

Notice of Meeting and Agenda Scotland Excel Executive Sub-committee

Date	Time	Venue
Friday, 22 April 2022	09:30	Remotely by MS Teams ,

MARK CONAGHAN
Clerk

Membership

Provost Bill Howatson (Aberdeenshire Council); Councillor Angus Macmillan Douglas (Angus Council); Councillor Andrew Johnston (City of Edinburgh Council); Provost Norman A Macdonald (Comhairle Nan Eilean Siar); Councillor Stephen Thompson (Dumfries & Galloway Council); Councillor Altany Craik (Fife Council); Councillor Ruairi Kelly (Glasgow City Council); Councillor Jimmy Gray (Highland Council); Councillor Joe Cullinane (North Ayrshire Council); Councillor Paul Di Mascio (North Lanarkshire Council); Councillor John Shaw (Renfrewshire Council); Councillor Amanda Hawick (Shetland Islands Council) and Councillor Josh Wilson (South Lanarkshire Council)

Councillor John Shaw (Convener): Councillor Paul Di Mascio (Vice Convener)

Further Information

If you require further information in relation to this meeting please call 014 618 7111.

Items of business

Apologies

Apologies from members.

Declarations of Interest

Members are asked to declare an interest in any item(s) on the agenda and to provide a brief explanation of the nature of the interest.

- | | | |
|-------------|---|------------------|
| 1 | Minute | 5 - 12 |
| | Minute of meeting of the Executive Sub-committee held on 18 March 2022. | |
| 2 | Annual Audit Plan 2021/22 | 13 - 26 |
| | Report by Treasurer. | |
| 3 | Operating Plan Update 2021/22 | 27 - 38 |
| | Report by Chief Executive of Scotland Excel. | |
| 4(a) | Contract for Approval: Supply of Digital Publications and Services | 39 - 50 |
| | Report by Chief Executive of Scotland Excel. | |
| 4(b) | Contract for Approval: Supply and Delivery of Library Books and Textbooks | 51 - 66 |
| | Report by Chief Executive of Scotland Excel. | |
| 4(c) | Contract for Approval: Electric Vehicle Charging Infrastructure | 67 - 94 |
| | Report by Chief Executive of Scotland Excel. | |
| 4(d) | Contract for Approval: Supply and Delivery of Personal Protective Equipment (PPE) including Pandemic Recovery Items and Workwear | 95 - 112 |
| | Report by Chief Executive of Scotland Excel. | |
| 5(a) | Request for Associate Membership: Scottish Enterprise | 113 - 114 |
| | Report by Chief Executive of Scotland Excel. | |

5(b)	Request for Associate Membership: Scottish Natural Heritage	115 - 116
	Report by Chief Executive of Scotland Excel.	
5(c)	Request for Associate Membership: Shire Housing Association Limited	117 - 118
	Report by Chief Executive of Scotland Excel.	
5(d)	Request for Associate Membership: The Skills Development Scotland Company Limited	119 - 120
	Report by Chief Executive of Scotland Excel.	
5(e)	Request for Associate Membership: MYtown MYcommunity Limited	121 - 122
	Report by Chief Executive of Scotland Excel.	
5(f)	Request for Associate Membership: Fife Resource Solutions LLP	123 - 124
	Report by Chief Executive of Scotland Excel.	
6	Employee Supporting Attendance Report	125 - 128
	Report by Chief Executive of Scotland Excel.	
7	Date of Next Meeting	
	Note that the next meeting of the Executive Sub-committee will be held at 9.30 am on 17 June 2022.	



Minute of Meeting Scotland Excel Executive Sub-committee

Date	Time	Venue
Friday, 18 March 2022	09:30	Remotely by MS Teams,

Present

Councillor Charles Buchan (substitute for Provost Bill Howatson) (Aberdeenshire Council); Councillor Angus Macmillan Douglas (Angus Council); Provost Norman Macdonald (Comhairle Nan Eilean Siar); Councillor Stephen Thompson (Dumfries & Galloway Council); Councillor Altany Craik (Fife Council); Councillor Ruairi Kelly (Glasgow City Council); Councillor Jimmy Gray (Highland Council); Councillor Paul Di Mascio (North Lanarkshire Council); and Councillor John Shaw (Renfrewshire Council).

Chair

Councillor Shaw, Convener, presided.

In Attendance

J Welsh, Chief Executive, H Carr, Head of Strategic Procurement, L Campbell, Corporate Services Manager, L Richard, Strategic Procurement Manager, L Cairns, Senior Procurement Specialist and K Forrest, Office Manager, (all Scotland Excel); and L Mitchell, Managing Solicitor (Contracts and Conveyancing), C McCourt, Corporate Business Manager, L Belshaw, Democratic Services Manager and R Devine, Senior Committee Services Officer (all Renfrewshire Council).

Apologies

Provost Bill Howatson (Aberdeenshire Council); Councillor Andrew Johnston (City of Edinburgh Council); and Councillor Joe Cullinane (North Ayrshire Council).

Declarations of Interest

Councillor Di Mascio declared an interest in item 5(a) of the agenda for the reason that he was an owner/occupier in the industry. Councillor Di Mascio indicated that as he had declared an interest, he would leave the online meeting during any discussion and voting on the item.

Councillor Craik declared an interest in items 6(a) and 6 (c) of the agenda for the reason that they related to Fife Council. Councillor Craik indicated that as he had declared interests, he would leave the online meeting during any discussion and voting on the items.

Order of Business

In terms of Standing Order 12, the Convener intimated that he proposed to alter the order of business to facilitate the conduct of the meeting by considering item 6 in the following order, item 6(b), then 6(d), then 6(a) and then 6(c).

1 Minute

There was submitted the Minute of the meeting of the Executive Sub-committee held on 18 February 2022.

DECIDED: That the Minute be approved.

Sederunt

Councillor Di Mascio joined the meeting during consideration of the following item of business.

2 Chief Executive's Update Report to Chief Executive Officers Management Group (CEOMG) - February 2022

There was submitted a report by the Chief Executive of Scotland Excel relative to the Chief Executive's update report considered at the meeting of the Scotland Excel Chief Executive Officers Management Group (CEOMG) held on 16 February 2022, covering the period from November 2021 to February 2022, a copy of which was appended to the report.

The report intimated that the CEOMG met quarterly and that as part of the regular governance process, the Chief Executive of Scotland Excel provided an update on the work of Scotland Excel. Following discussions with the Convener, it had been agreed that future reports, be shared with members of the Scotland Excel Executive Sub-committee, following CEOMG meetings.

DECIDED: That the report be noted.

3 Revenue Budget Monitoring

There was submitted a joint revenue budget monitoring report by the Treasurer and the Chief Executive of Scotland Excel for the period 1 April 2021 to 4 February 2022.

The report intimated that at the end of period 11, Scotland Excel was projecting a break-even position by year-end in its core activities and a £52,000 contribution to project reserves by year-end within projects. It was noted that both core and projects budgets would be monitored closely in order to mitigate any significant variances. Further detail was provided in section 3 of the report.

The appendices to the report provided an analysis of the actual spend to date along with projected net expenditure for 2021/22 and included a summary of movement in both the revenue reserve and the project reserves.

DECIDED: That the report be noted.

4 **Update on the Contract Delivery Plan**

There was submitted a report by the Chief Executive of Scotland Excel providing a progress update on the 2021/22 contract delivery plan.

The report intimated that the contract delivery plan detailed new framework developments and renewals, framework extensions and frameworks with ongoing contract management only and appendices 1 to 4 to the report provided further details.

The report highlighted that there were 72 current frameworks in the Scotland Excel portfolio with six further new frameworks to be added and 32 of these frameworks to be renewed before 30 June 2023. A further 19 of these frameworks had extension options that were likely to be exercised, with 12 of these extensions already approved.

The estimated forecast value of the Scotland Excel framework portfolio by 31 March 2022 would be approximately £2 billion. It was noted that overall, efficiencies delivered to date in 2021/22 were 2.3%, which was within the forecast range.

The report advised that in addition to the activity detailed in appendices 1 to 4, Scotland Excel was exploring the benefits of further collaborative procurement across high spend, critical service areas in the construction, corporate, ICT and social care teams.

A summary of spend and forecast savings per Council for the period October 2020 to September 2021 was detailed in Appendix 5 to the report, with an average forecast efficiency of circa 1.60%.

DECIDED: That the progress made to date be noted.

Declaration of Interest

Councillor Di Mascio having previously declared an interest in the following item, left the meeting and took no part in the discussion or voting thereon.

5(a) **Contract for Approval: Pest Control Services and Associated Products (Update)**

Under reference to item 3 of the Minute of the meeting of this Sub-committee held on 18 February 2022, there was submitted a report by the Chief Executive of Scotland Excel relative to the award of the renewal framework for pest control services and associated products for the period 1 February 2022 until 31 January 2025, with the option to extend for up to 12 months until 31 January 2026.

It was noted that this report superseded the recommendations contained in the report approved by the Sub-committee on 18 February 2022 and subject to approval and completion of a standstill period, it was intended that the framework would commence on or around 1 April 2022.

The framework covered the removal of rats and mice, crawling insects, flying insects and the supply of pest control chemicals and accessories.

The report summarised the outcome of the procurement process for the framework which had been divided into two lots, as detailed in table 1 of the report.

The report advised that the framework had been advertised at a total value of £1 million per annum, which equated to an estimated spend of £4 million over the maximum four-year term of the framework and Appendix 1 to the report detailed the participation, spend and savings summary of those councils participating in the framework.

Tender responses had been received from 11 suppliers and Appendix 2 to the report provided a summary of the offers received. It was noted that all respondents had passed the first-stage qualification/selection assessment, however, one bidder was non-compliant having failed to upload a pricing schedule and had been advised accordingly. Further, that one bid had been withdrawn.

Based on the criteria and scoring methodology set out in the tender document, a full evaluation of the compliant offers had been carried out and Appendix 3 to the report confirmed the scoring achieved by each bidder.

Based on the evaluation undertaken, and in line with the advertised criteria and weightings set out in the report, it was recommended that a multi-supplier framework arrangement be awarded to seven suppliers across the two lots, as outlined in Appendix 3 to the report.

It was noted that a 'standstill' procedure commenced on the basis of recommendations approved at the meeting of the Executive Sub-committee held on 18 February 2022. Following enquiries raised by contractors, the standstill procedure expired without any awards being made.

Appendix 4 to the report detailed the approach taken by suppliers in relation to fair work practices and their position on the payment of the Real Living Wage.

The report intimated that, in accordance with Scotland Excel's established contract and supplier management programme, the framework had been classified as class D in terms of risk and spend, as detailed in Appendix 5 to the report.

DECIDED: That the award of the multi-supplier framework for pest control services and associated products, as detailed in Appendix 3 to the report, be approved and that it be noted that this superseded the recommendations brought before members on 18 February 2022.

Sederunt

Councillor Di Mascio rejoined the meeting prior to consideration of the following item of business.

Councillor Gray left the meeting during consideration of the following item of business.

5(b) **Contract for Approval: Vehicle and Plant Hire**

There was submitted a report by the Chief Executive of Scotland Excel relative to the award of a fourth-generation framework for vehicle and plant hire for the period 21 February 22 to 20 February 2024, with the option to extend for a further two 12-month periods until 20 February 2026.

The framework covered the hire of vehicles and plant equipment on a variety of hire periods to support the requirement of councils' fleet and roads departments. It was noted that the use of hired equipment supplemented existing council assets and assisted with seasonal and intermittent demands as well as assisting with the increased demand for vehicles to support ongoing social distancing measures.

The report summarised the outcome of the procurement process for the framework which had been divided into 12 lots, as detailed in table 1 of the report.

The report advised that the framework had been advertised with an estimated value of £60 million per annum, over the four-year term of the framework, and Appendix 1 to the report detailed the participation, spend and savings summary of those councils participating in the framework together with Tayside Contracts.

Tender responses had been received from 64 suppliers and Appendix 2 to the report provided a summary of the offers received. It was noted that two responses were deemed non-compliant for all lots in which they tendered and had been advised that their offers would not be considered further. Further, that one response had been deemed partially non-compliant and had been advised their offer would not be considered further for one lot and that they had been recommended for partial award to the framework.

Based on the criteria and scoring methodology set out in the tender document, a full evaluation of the compliant offers had been carried out and Appendix 3 to the report confirmed the scoring achieved by each bidder.

Based on the evaluation undertaken, and in line with the advertised criteria and weightings set out in the report, it was recommended that a multi-supplier framework arrangement be awarded to 56 suppliers across the 12 lots, as outlined in Appendix 3 to the report.

Appendix 4 to the report detailed the approach taken by suppliers in relation to fair work practices and their position on the payment of the Real Living Wage.

The report intimated that, in accordance with Scotland Excel's established contract and supplier management programme, the framework had been classified as class D in terms of risk and spend, as detailed in Appendix 5 to the report.

DECIDED: That the award of the multi-supplier framework for vehicle and plant hire, as detailed in Appendix 3 to the report, be approved.

6(a) **Request for Associate Membership: Clyde Gateway URC Limited**

There was submitted a report by the Chief Executive of Scotland Excel advising that Clyde Gateway URC Limited had submitted an application to become an associate member of Scotland Excel.

The report provided details of the organisation and the legislative position in relation to the application.

DECIDED: That the application by Clyde Gateway URC Limited to become an associate member of Scotland Excel, with no annual membership fee, be approved subject to completion and signing of the agreement documentation.

6(b) **Request for Associate Membership: Scottish Ministers acting through Social Security Scotland**

There was submitted a report by the Chief Executive of Scotland Excel advising that Scottish Ministers, acting through Social Security Scotland, had submitted an application to become an associate member of Scotland Excel.

The report provided details of the organisation and the legislative position in relation to the application.

DECIDED: That the application by Scottish Ministers, acting through Social Security Scotland, to become an associate member of Scotland Excel, with no annual membership fee, be approved subject to completion and signing of the agreement documentation.

Declaration of Interest

Councillor Craik having previously declared interests in the next two items left the meeting and took no part in the discussion or voting thereon.

6(c) **Request for Associate Membership: Cireco (Scotland) LLP**

There was submitted a report by the Chief Executive of Scotland Excel advising that Cireco (Scotland) LLP had submitted an application to become an associate member of Scotland Excel.

The report provided details of the organisation and the legislative position in relation to the application.

DECIDED: That the application by Cireco (Scotland) LLP to become an associate member of Scotland Excel, with no annual membership fee, be approved subject to completion and signing of the agreement documentation.

6(d) **Request for Associate Membership: Fife Golf Trust**

There was submitted a report by the Chief Executive of Scotland Excel advising that Fife Golf Trust had submitted an application to become an associate member of Scotland Excel.

The report provided details of the organisation and the legislative position in relation to the application.

DECIDED: That the application by Fife Golf Trust to become an associate member of Scotland Excel, with no annual membership fee, be approved subject to completion and signing of the agreement documentation.

7 **Date of Next Meeting**

DECIDED: That it be noted that the next meeting of the Executive Sub-committee would be held at 9.30 am on 22 April 2022.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
The Treasurer**

Report on the Annual Audit Plan 2021/22

1. Summary

- 1.1 The Annual Audit Plan 2021/22 for Scotland Excel is submitted for Members' information. It outlines Audit Scotland's planned activities during their audit of the 2021/22 financial year.

2. Recommendations

- 2.1 It is recommended that the Executive Sub-Committee notes the Annual Audit Plan 2021/22 by Audit Scotland, as attached.

3. Background

- 3.1 Based on its analysis of the risks facing Scotland Excel, Audit Scotland has submitted an Audit Plan that outlines its approach to the audit of the 2021/22 annual accounts. This will assess whether the accounts provide a true and fair view of the organisation's financial position, and also whether they have been prepared in accordance with proper accounting practice, i.e. the Code of Practice on Local Authority Accounting in the UK 2021/22.
- 3.2 The Audit Plan outlines the responsibilities of the Joint Committee and Treasurer and of Audit Scotland; its assessment of key challenges and risks and the approach and timetable for completion of the audit.
- 3.3 The Annual Audit Plan 2021/22 includes a section on Audit Risks. Within this section, the identified risks are included in the audit plans of many bodies that Audit Scotland work with and their inclusion is not a reflection of any specific risk within Scotland Excel.
- 3.4 The audit of financial year 2021/22 is the last year of the current audit appointment.

Scotland Excel

Annual Audit Plan 2021/22



 AUDIT SCOTLAND

Prepared for Scotland Excel
March 2022

Contents

Introduction	3
Financial statements audit planning	5
Audit dimensions and Best Value	8
Reporting arrangements, timetable, and audit fee	10
Other matters	12

Introduction

Summary of planned audit work

1. This document summarises the work plan for our 2021/22 external audit of Scotland Excel. The main elements of our work include:

- an audit of, and provision of an Independent Auditor's Report
- an audit opinion on other statutory information published within the annual accounts including the Management Commentary, the Remuneration Report and Annual Governance Statement
- consideration of arrangements in relation to financial sustainability and the annual governance statement
- consideration of Best Value arrangements.

Impact of Covid-19

2. The coronavirus disease (Covid-19) pandemic has had a significant impact on public services and public finances, and the effects will be felt well into the future.

3. The Auditor General for Scotland, the Accounts Commission and Audit Scotland continue to assess the risks to public services and finances from Covid-19 across the full range of our audit work, including annual audits and the programme of performance audits. The well-being of audit teams and the delivery of high-quality audits remain paramount. Changes in our approach may be necessary and where this impacts on annual audits, revisions to this Annual Audit Plan may be required.

Adding value

4. We aim to add value to Scotland Excel through our external audit work by being constructive and forward looking, by identifying areas for improvement and by recommending and encouraging good practice. In so doing, we will help Scotland Excel promote improved standards of governance, better management and decision making and more effective use of resources. Additionally, we attend committee meetings and actively participate in discussions.

Respective responsibilities of the auditor and Scotland Excel

5. The [Code of Audit Practice \(2016\)](#) sets out in detail the respective responsibilities of the auditor and Scotland Excel. Key responsibilities are summarised below.

Auditor responsibilities

6. Our responsibilities as independent auditors are established by the Local Government (Scotland) Act 1973 and the [Code of Audit Practice](#) (including

[supplementary guidance](#)) and guided by the Financial Reporting Council's Ethical Standard.

7. Auditors in the public sector give an independent opinion on the financial statements and other information within the annual accounts. We also review and report on the arrangements within the audited body to manage its performance, regularity and use of resources. In doing this, we aim to support improvement and accountability.

Scotland Excel responsibilities

8. Scotland Excel is responsible for maintaining accounting records and preparing financial statements that give a true and fair view.

9. Also, Scotland Excel has the primary responsibility for ensuring the proper financial stewardship of public funds, compliance with relevant legislation and establishing effective arrangements for governance, propriety and regularity that enable them to deliver their objectives.

Managing the transition to 2022/23 audits

10. Audit appointments are usually for five years but were extended to six years due to Covid-19. 2021/22 is the final year of the current appointment and we will work closely with our successors to ensure a well-managed transition.

Financial statements audit planning

Materiality

11. Materiality is an expression of the relative significance of a matter in the context of the financial statements as a whole. We are required to plan our audit to determine with reasonable confidence whether the financial statements are free from material misstatement. The assessment of what is material is a matter of professional judgement over both the amount and the nature of the misstatement.

Materiality levels for the 2021/22 audit

12. We assess materiality at different levels as described in [Exhibit 1](#). The materiality values for Scotland Excel are set out in [Exhibit 1](#).

Exhibit 1

2021/22 Materiality levels for Scotland Excel

Materiality	Scotland Excel
Planning materiality – This is the figure we calculate to assess the overall impact of audit adjustments on the financial statements. It has been set at 2 per cent of gross expenditure for the year ended 31 March 2022 based on the latest audited financial statements for 2020/21.	£127,000
Performance materiality – This acts as a trigger point. If the aggregate of errors identified during the financial statements audit exceeds performance materiality, this would indicate that further audit procedures should be considered. Using our professional judgement, we have assessed performance materiality at 75% of planning materiality.	£95,000
Reporting threshold (i.e. clearly trivial) – We are required to report to those charged with governance on all unadjusted misstatements more than the 'reporting threshold' amount. Using our professional judgement, we have assessed this as 5% of planning materiality.	£6,000

Source: Audit Scotland

Significant risks of material misstatement to the financial statements

13. Our risk assessment draws on our cumulative knowledge of Scotland Excel, its major transaction streams, key systems of internal control and risk management processes. Also, it is informed by our discussions with management, meetings with internal audit, attendance at boards and a review of supporting information.

14. Based on our risk assessment process, we identified the following significant risks of material misstatement to the financial statements. These are risks which have the greatest impact on our planned audit procedures. [Exhibit 2](#) summarises the nature of the risk, the sources of assurance from management arrangements and the further audit procedures we plan to perform to gain assurance over the risk.

Exhibit 2

2021/22 Significant risks of material misstatement to the financial statements

Significant risk of material misstatement	Sources of assurance	Planned audit response
<p>1. Risk of material misstatement due to fraud caused by the management override of controls</p> <p>As stated in International Standard on Auditing (UK) 240, management is in a unique position to perpetrate fraud because of management's ability to override controls that otherwise appear to be operating effectively.</p>	<p>Owing to the nature of this risk, assurances from management are not applicable in this instance</p>	<ul style="list-style-type: none"> • Make inquiries of individuals involved in the financial reporting process about inappropriate or unusual activity relating to the processing of journal entries and other adjustments. • Test appropriateness of journal entries recorded in the general ledger and other adjustments made in the preparation of the financial statements. • Evaluate significant transactions outside the normal course of business. • We will assess any changes to the methods and underlying assumptions used to prepare accounting estimates compared to the prior year. • Substantive testing of income and expenditure transactions around the year-end to confirm they are accounted for in the correct financial year. • Focussed testing of accounting accruals and prepayments.

Source: Audit Scotland

15. As set out in International Standard on Auditing (UK) 240: *The auditor's responsibilities relating to fraud in an audit of financial statement*, there is a presumed risk of fraud over the recognition of income. There is a risk that income may be misstated resulting in a material misstatement in the financial statements. We have rebutted this risk for Scotland Excel because a significant element of the body's income is requisition income from member authorities which have predictable income patterns which limits the potential for manipulation. We therefore do not incorporate specific work into our audit plan in this area, over and above our standard audit procedures.

16. In line with Practice Note 10: *Audit of financial statements and regularity of public sector bodies in the United Kingdom*, as most public-sector bodies are net spending bodies, the risk of material misstatement due to fraud related to expenditure recognition may in some cases be greater than the risk relating to income recognition. We have rebutted this risk for Scotland Excel as our assessment of the expenditure transaction streams has confirmed that many are low risk, for example, staff costs, depreciation, pensions IAS 19 charges and our standard audit procedures will involve focused testing on accruals in any higher risk areas.

17. Practice Note 10 also introduces the concept of external fraud risk and we have assessed the levels of fraud in the public sector per the National Fraud Initiative and this, as well as the analysis of expenditure, indicates that there is not a high risk of fraud across payment streams.

18. We have not, therefore, incorporated specific work into our audit plan in these areas over and above our standard audit procedures.

Other areas of audit focus

19. As part of our assessment of audit risks, we have identified other areas where we consider there are also risks of material misstatement to the financial statements. Based on our assessment of the likelihood and magnitude of the risk, we do not consider these to represent significant risks. We will keep these areas under review as our audit progresses. If our assessment of risk changes and these risks become significant, we will communicate this to management and those charged with governance and revise our planned audit approach accordingly. The area of specific audit focus is:

- **Measurement and judgements applied to the valuation of pension liabilities:** As at 31 March 2021, Scotland Excel recognised a net liability of £4.578 million relating to its share of the Strathclyde Pension Fund liability. There is a significant degree of subjectivity in the measurement and valuation of the pension fund liability. The valuation is based on specialist assumptions and estimates.

Audit risk assessment process

20. Audit risk assessment is an iterative and dynamic process. Our assessment of risks set out in this plan may change as more information and evidence becomes available during the progress of the audit. Where such changes occur, we will advise management and where relevant, report them to those charged with governance.

Audit dimensions and Best Value

Introduction

21. The [Code of Audit Practice](#) sets out the four dimensions that frame the wider scope of public sector audit. The Code of Audit Practice requires auditors to consider the adequacy of the arrangements in place for the audit dimensions in audited bodies.

Audit dimensions

22. Our standard audits are based on four audit dimensions that frame the wider scope of public sector audit requirements. These are: financial sustainability, financial management, governance and transparency, and value for money.

23. The Code of Audit Practice includes provisions relating to the audit of small bodies. Where the application of the full wider audit scope is judged by auditors not to be appropriate to an audited body then the annual audit work can focus on the appropriateness of the disclosures in the Annual Governance Statement and the financial sustainability of the body and its services. In the light of the nature of operations and arrangements for processing transactions, we plan to apply the small body provisions of the Code of Audit Practice to the 2021/22 audit of Scotland Excel.

Financial sustainability

24. As auditors, we consider the appropriateness of the use of the going concern basis of accounting as part of the annual audit. We will also comment on financial sustainability in the longer term. We define this as medium term (two to five years) and longer term (longer than five years).

Annual Governance Statement

25. Governance and transparency is concerned with the effectiveness of scrutiny and governance arrangements, leadership and decision making and transparent reporting of financial and performance information. We will review, conclude and report on the appropriateness of disclosures in the Annual Governance Statement.

Best Value

26. The Best Value work planned this year will focus on Scotland Excel's own self-evaluation work for achieving Best Value. Our findings will be reported through our Annual Audit Report.

Audit dimension risks

27. We have identified audit risks in the areas set out in [Exhibit 3](#). This exhibit sets out the risks, sources of assurance from management arrangements and the further audit procedures we plan to perform to gain assurances over the risks.

Exhibit 3

2021/22 Audit dimension risks

Description of risk	Sources of assurance	Planned audit response
<p>1.Financial Sustainability</p> <p>As part of the budget setting process, revenue estimates are prepared for a three-year period. This allows management and members to identify pressures and take early actions to mitigate against these pressures.</p> <p>The audited annual accounts for 2020/21 confirm a useable reserve balance of £1.019 million. Forecasts up to 2023/24 were included within the 2021/22 budget. The forecasts estimate a breakeven position in 2021/22 through to 2023/24. This position is based on a three per cent increase in requisition income for 2021/22 and two per cent in subsequent years. This position also assumes a project deficit of £0.152 million in 2021/22, with use of project reserves of £0.404 million.</p> <p>It is important that Scotland Excel updates its medium-term financial plan as soon as more clarity on the financial impacts of Covid-19 is obtained.</p>	<ul style="list-style-type: none"> • In December 2021 the Joint Committee approved revenue estimates for 2022/23 and indicative figures were also presented for 2023/24 and 2024/25. In each of the three years presented a 3% uplift in requisition was proposed. • A break-even position is forecast for Core activities in each of the three years presented. • The approach for Project activities differs, as income generated from project work often spans financial years. This is reflected in each year's estimate as a planned net draw from Project Reserves. • Core reserves are forecast at 4.8% of operating income by 31 March 2025. • Projects reserves are forecast at 23.1% of operating income by 31 March 2023. 	<ul style="list-style-type: none"> • Review of the Scotland Excel's annual budget setting arrangements. • Review and assessment of budget monitoring arrangements on financial position. • On-going review of the Scotland Excel's financial position and delivery of planned savings.

Source: Audit Scotland

Reporting arrangements, timetable, and audit fee

Reporting arrangements

28. Audit reporting is the visible output for the annual audit. All Annual Audit Plans and the outputs, as detailed in [Exhibit 4](#), and any other outputs on matters of public interest will be published on our website: www.audit-scotland.gov.uk.

29. Matters arising from our audit will be reported on a timely basis and will include agreed action plans. Draft management reports will be issued to the relevant officers to confirm factual accuracy.

30. We will provide an independent auditor's report to Scotland Excel and the Accounts Commission setting out our opinions on the annual accounts. We will provide Scotland Excel and the Accounts Commission with an annual report on the audit containing observations and recommendations on significant matters which have arisen during the audit.

31. Covid-19 has had a considerable impact on the conduct and timeliness of the audit. We recognise that it is in the best interests of public accountability to get the reporting of audited accounts back to pre-pandemic timelines. To this end, 2021/22 is a transition year with the reporting deadline brought forward by one month relative to the two prior years. We are identifying ways to work more efficiently to expedite the 2021/22 audits whilst at the same time maintaining high standards of quality.

32. [Exhibit 4](#) outlines the target dates for our audit outputs. Due to pressures associated with the Covid-19 pandemic we have agreed an audit timetable consistent with the prior year. This means that we will not meet the Audit Planning Guidance deadline of 31 October 2022.

Exhibit 4

2020/21 Audit outputs

Audit Output	Target date	Executive Sub-committee date
Annual Audit Plan	31 March 2022	18 March 2022
Independent Auditor's Report	31 October 2022	18 November 2022
Annual Audit Report	31 October 2022	18 November 2022

Source: Audit Scotland

Audit fee

33. The proposed audit fee for the 2021/22 audit of Scotland Excel is £6,320 (2020/21: £6,150). In determining the audit fee, we have taken account of the risk exposure of Scotland Excel, the planned management assurances in place and the level of reliance we plan to take from the work of internal audit.

34. Where our audit cannot proceed as planned through, for example, late receipt of unaudited annual report and accounts, the absence of adequate supporting working papers or being unable to take planned reliance from the work of internal audit, a supplementary fee may be levied. An additional fee may also be required in relation to any work or other significant exercises out with our planned audit activity.

Other matters

Internal audit

35. From our initial review of the internal audit plans, we do not plan to place formal reliance on internal audit's work for our financial statements' responsibilities. We do plan to consider the findings of Internal Audit work undertaken in the year.

Independence and objectivity

36. Auditors appointed by the Auditor General for Scotland or Accounts Commission must comply with the [Code of Audit Practice](#) and relevant supporting guidance. When auditing the financial statements, auditors must also comply with professional standards issued by the Financial Reporting Council and those of the professional accountancy bodies. These standards impose stringent rules to ensure the independence and objectivity of auditors. Audit Scotland has robust arrangements in place to ensure compliance with these standards including an annual '*fit and proper*' declaration for all members of staff. The arrangements are overseen by the Director of Audit Services, who serves as Audit Scotland's Ethics Partner.

37. The engagement lead (i.e. appointed auditor) for Scotland Excel is Mark Ferris, Senior Audit Manager. Auditing and ethical standards require the appointed auditor to communicate any relationships that may affect the independence and objectivity of audit staff. We are not aware of any such relationships pertaining to the audit of Scotland Excel.

Quality control

38. International Standard on Quality Control (UK) 1 (ISQC1) requires a system of quality control to be established, as part of financial audit procedures, to provide reasonable assurance that professional standards and regulatory and legal requirements are being complied with and that the independent auditor's report or opinion is appropriate in the circumstances.

39. The foundation of our quality framework is our Audit Guide, which incorporates the application of professional auditing, quality and ethical standards and the [Code of Audit Practice](#) (and supporting guidance) issued by Audit Scotland and approved by the Auditor General for Scotland. To ensure that we achieve the required quality standards, Audit Scotland conducts peer reviews and internal quality reviews. Additionally, the Institute of Chartered Accountants of Scotland (ICAS) have been commissioned to carry out external quality reviews.

40. As part of our commitment to quality and continuous improvement, Audit Scotland will periodically seek your views on the quality of our service provision. We welcome feedback at any time, and this may be directed to the engagement lead.

Scotland Excel

Annual Audit Plan 2021/22

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Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Operating Plan Update 2021-22

1. Summary

- 1.1 In June 2018, Scotland Excel's Joint Committee approved a new five-year corporate strategy supported by annual operating plans. Due to the impact of the Covid-19, the annual planning process was suspended and an interim operating plan created to guide activities until the end of 2020.
- 1.2 In December 2020, the Joint Committee approved a new operating plan which covers the fifteen-month period from January 2021 to March 2022. To simplify reporting, the number of commitments in the plan was reduced from 68 detailed commitments to 30 broader commitments. These align to more than 120 specific actions that have been cascaded to staff as part of Scotland Excel's Performance Review and Development (PRD) programme.
- 1.3 This report presents an update on the activity undertaken by the organisation between January and March 2022 to conclude the final quarter of the Operating Plan 2021-22.
- 1.4 The Joint Committee approved a new one-year operating plan in December 2021 which takes effect from 01 April 2022. The Operating Plan 2022-23 will form the basis of future committee reports updating members on the organisation's progress.






2. Recommendations

- 2.1 The members of the Joint Committee are invited to note Scotland Excel's progress in delivering the commitments contained within the Operating Plan 2021-22.
- 2.2 Twenty-seven commitments in the operating plan have progressed in line with plans and are indicated as green within the report.

- 2.3 Two commitments are indicated as amber within the report. This status was selected to reflect the progress made whilst also recognising the commitment was not completed within the anticipated timeline. The roll out of stakeholder mapping tools and a competitor analysis model have been delayed until 2022-23. However, these tools are already being used successfully by some teams within the organisation.
- 2.4 One commitment is indicated as black within the report. Due to restrictions on holding national and regional events, the Coaction project is now being implemented on a project-by-project basis.

3. Background

- 3.1 Progress reports are produced quarterly to track Scotland Excel's activity against annual operating plan commitments. Reports are produced at the end of each quarter and submitted to Executive Sub-Committee meetings. Half yearly and annual reports are also submitted to Joint Committee meetings.
- 3.2 The reports summarise the progress made against operating plan commitments and uses a 'traffic light' symbol to provide a guide to the status of each activity. This guide has been revised to include symbols to indicate projects or activities which have not yet started, and projects or activities which have been completed:

	Project or activity not yet started
	Project or activity is currently stalled or significantly behind schedule
	Project or activity is progressing at a slower pace than anticipated and/or results have been weaker than expected
	Project or activity is progressing in line with expected/agreed timelines and results
	Project or activity completed

- 3.3 Due to continuing uncertainty in relation to Covid-19 and Brexit, reporting against key performance indicators (KPIs) is currently on hold pending a review of appropriate measures.










Operating Plan





2021 – 2022

Year End Report






Goal 1: Shaping the delivery of innovative public services


Strategic Objective	Commitment	RAG status	Progress summary
1.1 Deliver a programme of collaborative procurement to support early intervention and the delivery of public services	<ul style="list-style-type: none"> Continue to engage directly with local authority services on the collaborative procurement opportunities pipeline and identify opportunities to lead and/or participate in national cross-sector opportunities and initiatives with partners in health, further and higher education, and central government. 		<ul style="list-style-type: none"> A Commercial User Intelligence Group Steering Group meeting with procurement stakeholders took place in February. Scotland Excel is continuing to participate in several cross-sectoral initiatives including the Scottish Government-led Supply Chain Development Programme, the Public Sector Food Forum, and the Scottish Organic Stakeholders Group which is supporting the government's Scottish Organic Action Plan.
	<ul style="list-style-type: none"> Continue to develop and deliver a contract and supplier management (CSM) programme which monitors and enhances the performance of Scotland Excel contracts, incorporating new environmental performance measurements 		<ul style="list-style-type: none"> Contract and supplier management activity has focused on mitigating the impact of global supply chain disruptions and price volatility. Measures have also been implemented to identify supply chains with connections to Russia following the invasion of Ukraine. Work is ongoing to develop a new CSM reporting model which incorporates environmental performance measures in line with the Scottish Government's climate change goals.
	<ul style="list-style-type: none"> Open the Adult Care and Support flexible framework to allow new providers to join, ensuring a diverse range of services and providers are available to meet the varying needs of people across the country, and promote choice for people who need support. 		<ul style="list-style-type: none"> Following the reopening of the Adult Care and Support flexible framework, 21 new providers covering 26 services are being awarded to the framework. Local authorities will be able to use the new providers by the end of April 2022.
1.2 Deliver programmes which lead and develop professional, organisational and commercial capability	<ul style="list-style-type: none"> Develop a portfolio of accredited and non-accredited Academy programmes based on member and wider public sector requirements whilst progressing other strategic areas such as apprenticeships and becoming a credit rating body. 		<ul style="list-style-type: none"> The Scotland Excel Academy is currently delivering 9 cohorts of accredited programmes, with a further 10 programmes planned. Several courses have been delivered through the Scottish Government's national procurement training framework, and a full programme of open and closed courses will be launched across the public sector in April.

	<ul style="list-style-type: none"> • Deliver sector and local initiatives which support Scottish Government national policy objectives, such as flexible and affordable solutions. 		<ul style="list-style-type: none"> • A third tranche of Stay Connected free online seminars for procurement practitioners was launched in February. Following discussions with council procurement leads, the third cycle of the national Procurement Commercial Improvement Programme (PCIP) assessments has been postponed until 2022-23. Plans are underway for the Scotland Excel Annual Conference which will take place on 18-19 May as a hybrid online and in-person event.
	<ul style="list-style-type: none"> • Continue to deliver chargeable consultancy and transformation programmes, responding to any requests for these types of services and building the Scotland Excel knowledge bank to retain the intellectual property of improvement methodologies and resources within the local government sector 		<ul style="list-style-type: none"> • Scotland Excel is continuing to deliver a range of chargeable and consultancy services to councils, partners and associate members, including flexible procurement, consultancy, and bespoke learning and development programmes. Following the successful delivery of a similar programme for the Scottish Government, the Department of Health for Northern Ireland has commissioned Scotland Excel to administer their £500 payments to personal assistants to recognise their work during Covid.
	<ul style="list-style-type: none"> • Engage with members, suppliers and providers to understand the impact of Covid-19 and BREXIT to support the delivery of frameworks, services and knowledge to meet Local Authority and national objectives. 		<ul style="list-style-type: none"> • Scotland Excel is continuing to closely monitor the impact of Covid-19, Brexit and other global events on the pricing and availability of key framework commodities, and is providing regular updates to stakeholders. The invasion of Ukraine has had a significant impact on the availability of bitumen which was predominantly sourced from Russia. Rising energy prices have impacted most framework suppliers, and all frameworks are being reviewed to develop recommendations which will help councils manage their sourcing challenges.






	<ul style="list-style-type: none"> • Drive the next generation development of the National Care Home Contract (NCHC) and continue negotiations with providers on rates of return to enable implementation of the NCHC Cost Model © which supports the delivery of affordable and sustainable social care services. 		<ul style="list-style-type: none"> • The national care home contract fees for 2022-23 have been agreed and work is underway to roll out the new rates which take effect from 6th April. A meeting with stakeholders interested in participating in the redesign of the national care home contract has been scheduled for April.
1.3 Harness the potential of digital technology and data insight to support the delivery of public services	<ul style="list-style-type: none"> • Continue to develop The Academy's online learning platform, to support engagement and learning, and to deliver national coaction events, video content and programmes. 		<ul style="list-style-type: none"> • The Scotland Excel Academy online platform continues to be developed, and now incorporates automated reminders for student assessment tasks.
	<ul style="list-style-type: none"> • Continue to provide ICT procurement services for the Digital Office for Scottish Local Government, engaging proactively with stakeholders to accelerate a collaborative approach to the adoption of digital technologies. 		<ul style="list-style-type: none"> • Scotland Excel is continuing to work on a range of collaborative ICT solutions including Artificial Intelligence (AI)/robotics, and procurement routes to establish a National Security Operating Centre (SOC), and National Shared Digital Alarm Receiving Centre.
1.4 Use our insight and experience to shape policy and meet the challenges of future public service delivery	<ul style="list-style-type: none"> • Continue to work with the Scottish Government and other partners to support the development and/or delivery of national policy objectives across the SXL portfolio including guidance, tools and reporting. 		<ul style="list-style-type: none"> • Work is continuing with the Scottish Government and other partners across a range of policy areas. Scotland Excel is taking part in the Key Stakeholder Reference Group informing the implementation of the National Care Service, and has contributed to the Construction Industry Inquiry Group and Fair Work Convention's review of review of working practices in Scotland's construction industry.


Goal 2: Being sustainable in everything we do

Strategic Objective	Commitment	RAG status	Progress summary
2.1 Deliver positive and measurable social value through our contracts and services	<ul style="list-style-type: none"> Work with partners and secure care providers to support the implementation of the new National Standards and Pathways for Secure Care Centres. 		<ul style="list-style-type: none"> The new national standards have been built into secure care contracts. Scotland Excel continues to liaise with key partners on future plans for secure care and will contribute to a national consultation on the forthcoming Children's Care and Justice Bill.
	<ul style="list-style-type: none"> Continue to monitor the proportion of Scotland Excel suppliers paying their staff the Real Living Wage and identify any opportunities to increase this 		<ul style="list-style-type: none"> More than 80% of suppliers have confirmed payment of the Living Wage, and commitments continue to be monitored as part of ongoing contract management activity. Scotland Excel is continuing to work with the Scottish Government and other stakeholders on remuneration for the social care workforce.
	<ul style="list-style-type: none"> Continue to embed community benefit models which enable councils to achieve direct benefits for their areas and the participation of supported businesses and the third sector within our supply chain 		<ul style="list-style-type: none"> Scotland Excel has been engaging with councils to review its community benefits model. Feedback from two workshops will be used improve data gathering procedures and reporting.
2.2 Deliver positive and measurable local economic impact through SME and third sector participation in our contracts	<ul style="list-style-type: none"> Support the continued application of community wealth building including living wage Scotland Excel suppliers and work with partners including Scottish Government and the Supplier Development Programme (SDP) 		<ul style="list-style-type: none"> A practice sharing workshop took place in February with Scotland Excel, Scottish Government and the four pilot councils to discuss the outcomes of the community wealth-building project. A suite of templates has been developed and a toolkit is being created which will provide a model to be share with councils in support of their own community wealth-building journeys.
2.3 Deliver positive and measurable environmental benefits through our contracts	<ul style="list-style-type: none"> Continue to deliver and promote environmental sustainability goals including Scotland Excel and supplier carbon footprint and consider "best value" and 'whole life' costing within tender evaluations 		<ul style="list-style-type: none"> Scotland Excel is reviewing all frameworks to identify how they support council net zero ambitions. This includes working with external bodies to review policy impacts, low carbon innovations, and changes to working practices. A new tool is being developed to calculate the levels of embodied carbon in construction materials.






<p>2.4 Lead and develop sustainable procurement knowledge and practice</p>	<ul style="list-style-type: none"> • Explore the development of progressive, sustainable learning pathways to support career development within the sector, co-chairing the Scottish Government professional practice and development framework, and work with educational partners and/or suppliers to establish workforce needs and promote the benefits of procurement as a career. 		<ul style="list-style-type: none"> • The Scotland Excel Academy is continuing to co-chair the cross-sector Professional Practice and Development (PPD) forum to explore national initiatives to attract and develop procurement talent. In March, Scotland Excel launched a recruitment campaign for a graduate recruitment programme which has attracted a pool of high-quality candidates.
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Goal 3: Placing people at the heart of our business






Strategic Objective	Commitment	RAG status	Progress summary
3.1 Ensure our customers continue to receive maximum value from our services	<ul style="list-style-type: none"> Continue to deliver Scotland Excel's account management services to ensure and demonstrate value to members and support a positive customer experience 		<ul style="list-style-type: none"> Scotland Excel's Project and Account Managers continue to provide support to council procurement teams including quarterly business reviews, change projects, and workshops.
	<ul style="list-style-type: none"> Continue and refresh Scotland Excel's stakeholder engagement activity including understanding priorities and assessing satisfaction 		<ul style="list-style-type: none"> Scotland Excel's stakeholder engagement and mapping tools are being used by several teams in support of income generating frameworks and services. Further plans to roll out use across the organisation are planned for 2022-23.
3.2 Engage stakeholders in the delivery of effective local solutions	<ul style="list-style-type: none"> Continue to engage directly with service users and the wider community, where appropriate, to ensure their needs are met and incorporated into the development of procurement strategies 		<ul style="list-style-type: none"> Scotland Excel is investigating options for engaging with care home residents and their families as part of the national care home contract redesign project.
	<ul style="list-style-type: none"> Continue to engage directly with partners to ensure that national social care contracts meet the needs of all care groups and align with national strategy 		<ul style="list-style-type: none"> Scotland Excel is continuing to engage with The Promise and other key stakeholders to ensure policy direction is reflected in contracts for children's services. Representatives from advocacy groups, providers, provider bodies, unions and Scottish Government have agreed to work with Scotland Excel on the redesign of the national care home contract.
3.3 Represent the collective views of stakeholders at a national level	<ul style="list-style-type: none"> Continue to collect, review and represent the views of members, customers and communities at appropriate fora 		<ul style="list-style-type: none"> Scotland Excel is continuing to represent the local government sector within Scottish Government national initiatives including the Climate Change Forum, the Professional Practice and Development Forum, and the Supply Chain Development Forum. In March, Scotland Excel took part in a round table meeting with the UK Department of Education and other devolved nations to discuss the issues, priorities and challenges arising from educational budgets.

<p>3.4 Implement policies which develop, empower, value and engage our workforce</p>	<ul style="list-style-type: none"> • Continue to implement the Scotland Excel organisational development strategy, developing initiatives to inspire and develop staff, increase Scotland Excel's capability, and support succession planning 		<ul style="list-style-type: none"> • Scotland Excel's new People Strategy is close to completion and will be launched in early 2022-23. A flexible and dynamic approach to recruitment has been implemented to mitigate the challenges of a fast-moving and competitive job market. An online careers event, digital marketing campaigns and expanded website content has been successful in attracting interest from candidates.
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Goal 4: Delivering sustainable and scalable growth

Strategic Objective	Commitment	RAG status	Progress summary
4.1 Implement a new governance model which supports scalable business growth	<ul style="list-style-type: none"> Promote the concept of Coaction to senior stakeholders and explore opportunities where creation, delivery and production of high-quality national cost effective learning is jointly undertaken 		<ul style="list-style-type: none"> Due to ongoing restrictions in bringing people together for a Coaction event, the concept will now be rolled out through partnership working on a project-by-project basis.
	<ul style="list-style-type: none"> Continue to implement appropriate funding routes through the delivery of new and existing services, monitoring income and providing regular reports to the joint committee whilst recognising the impact of the pandemic 		<ul style="list-style-type: none"> Income from chargeable services and rebates continues to grow and is expected to account for c.15% of operating income in 2021-22. A healthy pipeline is in place for 2022-23 when this income is expected to account for c.21% of the total.
4.2 Continue to maintain a robust business infrastructure to support our growth ambitions	<ul style="list-style-type: none"> Continue to develop and support a robust working environment and infrastructure that includes the use of digital technology, agile working and emerging technology to benefit staff and customers 		<ul style="list-style-type: none"> Plans for rolling out hybrid working have continued during Q4 to support a return to office working within the next few months. Scotland Excel is working with the Digital Office to review cyber security and disaster recovery provision across its ICT infrastructure to ensure it is in line with National Cyber Security Centre guidance.
4.3 Use our knowledge and insight to identify new services and/or sectors which provide growth opportunities	<ul style="list-style-type: none"> Research collaborative procurement and leading change solutions available in other public sector markets to identify potential business opportunities, reporting on the findings to inform future growth plans 		<ul style="list-style-type: none"> A competitor analysis model was developed and successfully piloted during 2021-22, including an analysis of key framework competitors. Roll out of the model across the organisation are planned for 2022-23.
	<ul style="list-style-type: none"> Continue to grow and develop Scotland Excel's associate membership programme to maximise its commercial potential for the organisation including framework spend whilst providing demonstrable benefits for members 		<ul style="list-style-type: none"> Seven new associate members were approved in Q4 with a total annual income of £4,461k. Scotland Excel presented at the Scottish Federation of Housing Associations (SFHA) development conference in March to promote a new procurement improvement assessment service which will be developed in 2022-23 to help housing associations meet Scottish Government funding criteria for new build development.

4.4 Explore opportunities to work with partners on the development and delivery of new business opportunities	<ul style="list-style-type: none"> Continue to market Scotland Excel through traditional and social media, targeted communications activity and political engagement to support new business opportunities and promote our knowledge and experience in support of policy and public affairs goals 		<ul style="list-style-type: none"> Marketing and communications activity for Q4 has included a significant recruitment campaign and online event, the launch of the EEC framework, marketing support for the launch of Scotland Excel's Annual Conference, press releases and case studies. Preparations have been taking place for a number of imminent campaigns including promotion of Academy programmes, and an engagement plan for new committee members.
	<ul style="list-style-type: none"> Explore new Scotland Excel partnership opportunities and continue to develop partnerships e.g., Crown Commercial Services (CCS) to ensure most effective delivery of Scotland Excel and customer objectives 		<ul style="list-style-type: none"> Scotland Excel is continuing to build positive relationships with growing number of partners including Scottish Enterprise, Construction Scotland Innovation Centre, Zero Waste Scotland and the Competition & Markets Authority (CMA). Work with Scottish Enterprise to identify opportunities to join up public sector demand with business investment is progressing well.

Report Key	
	Project not yet started
	Project or activity is currently stalled or significantly behind schedule
	Project or activity is progressing at a slower pace than anticipated and/or results have been weaker than expected
	Project or activity is progressing in line with expected/agreed timelines and results
	Project completed

Report issued: April 2022

Scotland Excel

To: Executive Sub-Committee

On: Friday 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Tender: Supply of Digital Publications and Services

Schedule: 10/21

Period: 1 August 2022 until 31 July 2025 with an option to extend for up to 12 months until 31 July 2026

1. Introduction and Background

This recommendation is for the award of the second-generation renewal framework for the Supply of Digital Publications and Services.

This proposed renewal framework was advertised for the period from 1 August 2022 until 31 July 2025 with the option to extend for up to 12 months until 31 July 2026.

This framework will provide councils with a mechanism to procure a range of services including but not limited to e-Books, e-Audiobooks and e-Magazines, e-Comics and e-Newspapers.

2. Scope, Participation and Spend

As part of the strategy development, the User Intelligence Group (UIG) endorsed the inclusion of five lots as summarised in Table 1.

Table 1: Lotting Structure

Lot No.	Description	Estimated % spend through lot
1	e-Books	44%
2	e-Audiobooks	35%
3	e-Magazines	15%
4	e-Comics	4%
5	e-Newspapers	2%

This lotting structure recognises the current landscape of the marketplace and is designed to align with council requirements, as well as maximising opportunities for Small and Medium Enterprises (SMEs).

The framework was advertised to enable access by all councils in Scotland. As detailed in Appendix 1, all 32 councils have confirmed their intention to participate in this framework.

The forecast annual spend for participating councils and associate members, with contingency, is £1 million per annum. This equates to an estimated spend of £4 million over the maximum 4-year term of the framework.

3. Procurement Process

A Prior Information Notice (PIN) was released on the Public Contracts Scotland portal on the 16th of July 2021 to inform the marketplace of Scotland Excel's intention to tender an opportunity for the supply of Digital Publications and Services. Prospective bidders were given the opportunity to participate in a preliminary market consultation exercise in accordance with Regulation 41 of the Public Contracts (Scotland) Regulations 2015. This involved engagement in meetings and provision to Scotland Excel of information in relation to, but not limited to, market intelligence, market trends, sustainability initiatives and community benefits to help inform the strategy. Subsequently, 11 organisations noted interest in the market consultation meetings. The meetings concluded on the 7th of August. Two online meetings with different companies were held.

A User Intelligence Group (UIG) consisting of representatives from participating councils endorsed the procurement strategy (September 2021). In addition, a working group consisting of technical and procurement representatives was formed to review technical specifications and participate in the evaluation of offers submitted.

Scotland Excel has taken cognisance of the current situation and impact during the tender exercise of the Coronavirus pandemic. Balancing the current situation with the need to provide a route to market for councils seeking the continuation of supply for Digital Publications and Services in order to meet their statutory functions and considering those council projects that may require to be undertaken in the future, Scotland Excel determined it was appropriate to undertake this renewal tender exercise and to recommend the establishment of this framework.

The Contract Notice was published via the Find A Tender and Public Contracts Scotland (PCS) portal on 1 March 2022, with the tender documentation being immediately available via the Public Contracts Scotland Tender (PCS-T) system.

As such, the tender exercise commenced after the UK withdrawal from the European Union and was conducted and concluded in accordance with the law and procedures currently in force.

The procurement process followed the open tender process to ensure maximum competition and the inclusion for all potential suppliers to service the framework. All bidders were examined against advertised selection criteria, using the Single Procurement Document (SPD), and award criteria, concurrently. The award criteria included technical and commercial sections that were evaluated against the following criteria and weightings:

Technical: 25%

Commercial: 75%

Within the technical section, bidders were required to evidence their knowledge and experience by responding to method statements which covered areas including Fair Work First, Community Benefits, Supplier Platform Operation, Methods of Access, Stock Ranges and Contract Implementation and Management. Bidders were also assessed in terms of their ability to provide Community Benefits. These are detailed below within Table 2.

Table 2: Technical Section Weighting

Question	Description	Weighting
1	Fair Work First	4
2	Community Benefits	3
3	Supplier Platform Operation	3
4	Methods of Access	3
5	Stock Ranges	7
6	Contract Implementation and Management	5
Total Score		25

Within the commercial section, bidders were invited to offer on a lot-by-lot basis for the lots outlined in Table 1, and fixed pricing for 24 months was required for all lots.

4. Report on Offers Received

The tender document was downloaded by 14 organisations, with 6 tender responses received by the specified closing date and time. A summary of all offers received is provided in Appendix 2.

Based on the criteria and scoring methodology set out in the tender document, a full evaluation of the compliant offers received was completed. Appendix 3 confirms the scoring achieved by each bidder.

5. Recommendations

Based on the evaluation undertaken, and in line with the advertised criteria and weightings summarised above, it is recommended that a multi-supplier

framework arrangement is awarded to 6 suppliers across five lots as outlined in Appendix 3.

The 6 recommended suppliers offer best value and represent a mix of small, medium and large organisations. By taking an inclusive approach this will provide members with a greater variety of content.

The range of suppliers recommended provides coverage for all awarding framework lots and competitive options for all participating councils as well as offering a degree of choice and capacity.

6. Benefits

Savings

Scotland Excel has conducted a benchmarking exercise comparing current fees against the fees submitted within the renewal tender. The result of this benchmarking is listed in Appendix 1. The projected average saving across all councils is 12%, which equates to an estimated total saving of approximately £114k per annum based on current forecast spend levels.

Price Stability

The framework applies 24 months fixed pricing for all lots. Thereafter, all requests for price increases will be evaluated according to the Terms and Conditions of the framework and require to be supported by documentary evidence.

Rebate

A rebate of 0.25% payable to Scotland Excel and 1.75% payable to councils will be applied to framework spend above £150,000 (excluding the initial £150,000) and will be calculated based upon total framework spend with the supplier reported through management information returns.

Sustainability

The framework offers many benefits in sustainability, namely environmental factors with no production required, no published material and no deliveries being made.

Community Benefits

Scotland Excel is committed to maximising community benefit delivery for our members and local communities. Suppliers were asked to commit to the delivery of community benefit initiatives, against pre-agreed spend thresholds outlined within the community benefits method statement. These aim to be reflective of the National Indicators outlined within the Scottish Government's National Performance framework, and their underlying vision and goals. Councils will accrue 'community benefit points' based on their level of spend with a supplier. These 'points' correlate to a negotiable benefit that the council can elect to

receive at any given point throughout the lifetime of the framework. Of the recommended suppliers, 4 have committed to delivering these benefits. Scotland Excel will continue to engage with all appointed suppliers to drive maximum adoption and delivery of community benefits where appropriate

Within the published tender documents, suppliers were given a list of indicative community benefits that could be agreed with councils. Examples of these are:

- employability workshop or events in schools, college or community groups
- sponsorship of local sports teams and community events
- donations of products and vouchers
- recruitment of full-time employees

Scotland Excel will monitor delivery of these commitments during the lifetime of the framework, and this will also be reported through ongoing contract management returns. Results reported on community benefits will be disseminated to councils on a 6 monthly basis.

Fair Work Practices including the Real Living Wage

Scotland Excel and its members are committed to the delivery of high-quality public services and recognise that this is dependent on a workforce that is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and skills development, are diverse and is engaged in decision making. Within the technical section of the tender, bidders were assessed on their approach to fair work practices and payment of the Real Living Wage to their workforce. Of the 6 recommended bidders, 5 pay the Real Living Wage, as detailed in Appendix 4 - List of Recommended Suppliers with Living Wage Status.

Scotland Excel will continue to monitor Fair Work Practices, including encouraging further uptake by suppliers committing to paying staff the Real Living Wage, during contract and supplier management activity.

7. Contract Mobilisation and Management

As part of the mobilisation process, all suppliers will be offered a contract mobilisation meeting to outline the operation of the framework, including roles and responsibilities, management information and community benefit commitments. Both suppliers and participating members will be issued with a mobilisation pack containing all required details to utilise the framework.

In accordance with Scotland Excel's established contract and supplier management programme, in terms of risk and spend as detailed in Appendix 5, this framework is classified as class D. As such, it will require annual supplier meetings and surveys, and annual user group reviews as appropriate. During the current market conditions Scotland Excel will continue to engage with suppliers on a regular basis to manage the response to the pandemic and ensure continuity of this essential service delivery for our members.

Meetings and engagement undertaken with suppliers will adhere to all applicable health and safety guidelines.

8. Summary

This second-generation framework for the Supply of Digital Publications and Services continues to maximise collaboration, promote added value and deliver best value. A range of benefits can be reported in relation to savings, price stability, sustainability and community benefits.

The Executive Sub Committee is requested to approve the recommendation to award this framework agreement as detailed in Appendix 3 (Scoring and Recommendations).

Appendix 1 – Participation, Spend and Savings Summary

Supply of Digital Publications and Services 1021

Member Name	Participation in Contract	Participation Entry Date	Estimated Annual Spend (£)	Source of Spend Data	Indexation (%)	% Estimated Forecast Savings	Estimated Annual Savings (£)	Basis of Savings Calculation
Aberdeen City Council	YES	01 August 2022	£14,646	Suppliers MI	7.0%	12.0%	£1,758	Benchmarked current framework
Aberdeenshire Council	YES	01 August 2022	£13,405	Suppliers MI	7.0%	12.0%	£1,609	Benchmarked current framework
Angus Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Argyll & Bute Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
City of Edinburgh Council	YES	01 August 2022	£38,554	Suppliers MI	7.0%	12.0%	£4,626	Benchmarked current framework
Clackmannanshire Council	YES	01 August 2022	£7,462	Suppliers MI	7.0%	12.0%	£895	Benchmarked current framework
Comhairle nan Eilean Siar	YES	01 August 2022	£775	Suppliers MI	7.0%	12.0%	£93	Benchmarked current framework
Dumfries & Galloway Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Dundee City Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
East Ayrshire Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
East Dunbartonshire Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
East Lothian Council	YES	01 August 2022	£16,235	Suppliers MI	7.0%	12.0%	£1,948	Benchmarked current framework
East Renfrewshire Council	YES	01 August 2022	£2,040	Suppliers MI	7.0%	12.0%	£245	Benchmarked current framework
Falkirk Council	YES	01 August 2022	£8,341	Suppliers MI	7.0%	12.0%	£1,001	Benchmarked current framework
Fife Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Glasgow City Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Highland Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Inverclyde Council	YES	01 August 2022	£2,937	Council Provided	7.0%	12.0%	£352	Benchmarked current framework
Midlothian Council	YES	01 August 2022	£985	Suppliers MI	7.0%	12.0%	£118	Benchmarked current framework
Moray Council	YES	01 August 2022	£5,783	Suppliers MI	7.0%	12.0%	£694	Benchmarked current framework
North Ayrshire Council	YES	01 August 2022	£9,477	Suppliers MI	7.0%	12.0%	£1,137	Benchmarked current framework
North Lanarkshire Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Orkney Islands Council	YES	01 August 2022	£1,444	Suppliers MI	7.0%	12.0%	£173	Benchmarked current framework
Perth & Kinross Council	YES	01 August 2022	£4,420	Suppliers MI	7.0%	12.0%	£530	Benchmarked current framework
Renfrewshire Council	YES	01 August 2022	£9,302	Suppliers MI	7.0%	12.0%	£1,116	Benchmarked current framework
Scottish Borders Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Shetland Islands Council	YES	01 August 2022	£4,128	Suppliers MI	7.0%	12.0%	£495	Benchmarked current framework
South Ayrshire Council	YES	01 August 2022	£8,046	Suppliers MI	7.0%	12.0%	£966	Benchmarked current framework
South Lanarkshire Council	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Stirling Council	YES	01 August 2022	£19,157	Suppliers MI	7.0%	12.0%	£2,299	Benchmarked current framework
West Dunbartonshire Council	YES	01 August 2022	£941	Suppliers MI	7.0%	12.0%	£113	Benchmarked current framework
West Lothian Council	YES	01 August 2022	£4,057	Suppliers MI	7.0%	12.0%	£487	Benchmarked current framework
Tayside Contracts	YES	01 August 2022	£0	Suppliers MI	7.0%	12.0%	£0	Benchmarked current framework
Totals			£172,135			12.0%	£20,656	
Associate Members	YES	01 August 2022	£774,978	Suppliers MI	7.0%	12.00%	£92,997	Benchmarked Current Framework
Totals			£947,113			12.00%	£113,654	

Appendix 2 – Summary of Offers Received

Name of Tenderer	SME Status	Location	Lot(s) Tendered	Lot(s) Awarded
Bibliotheca Limited	Medium	Cheadle, Cheshire	1, 2, 4	1, 2, 4
Bolinda UK Ltd	Small	London, England	1-5	1-5
EBSCO International Inc.	Large	Enfield, England	3	3
OverDrive Global Limited	Large	Leicestershire, England	1-5	1-5
Ulverscroft Limited	Medium	Leicestershire, England	1, 2	1, 2
Wheelers eplatform Limited	Small	Mitcheldean, England	1, 2	1, 2

Appendix 3 - Scoring and Recommendations

Lot 1 e-Books	Total Score	Recommended for Award
Ulverscroft Limited	96.50	Yes
Bolinda UK Ltd	89.74	Yes
Wheelers eplatform Limited	86.30	Yes
OverDrive Global Limited	76.33	Yes
Bibliotheca Limited	68.14	Yes

Lot 2 e-Audiobooks	Total Score	Recommended for Award
OverDrive Global Limited	96.00	Yes
Bolinda UK Ltd	82.26	Yes
Bibliotheca Limited	80.89	Yes
Ulverscroft Limited	76.08	Yes
Wheelers eplatform Limited	56.31	Yes

Lot 3 e-Magazines	Total Score	Recommended for Award
OverDrive Global Limited	96.00	Yes
EBSCO International Inc.	48.90	Yes
Bolinda UK Ltd	26.66	Yes

Lot 4 e-Comics	Total Score	Recommended for Award
Bibliotheca Limited	98.25	Yes
OverDrive Global Limited	39.07	Yes
Bolinda UK Ltd	24.70	Yes

Lot 5 e-Newspapers	Total Score	Recommended for Award
OverDrive Global Limited	96.00	Yes
Bolinda UK Ltd	24.77	Yes

Appendix 4- List of Recommended Suppliers with Living Wage Status

Tenderer	Accredited	Currently progressing through Real Living Wage accreditation process	Pay Real Living Wage to all employees, and committed to gaining accreditation over the initial 2 years of framework	Pay Real Living Wage to all employees, but not accredited	Neither accredited nor paying Real Living Wage, but do commit to pay the Real Living Wage to all employees over the initial 2 years of the framework	Neither accredited nor paying Real Living Wage
Bibliotheca Limited				Yes		
Bolinda UK Ltd	Yes					
EBSCO International Inc						Yes
OverDrive Global Inc.				Yes		
Ulverscroft Limited				Yes		
Wheelers eplatform Limited				Yes		

Appendix 5 – Segmentation classifications

1220 Supply of Digital Publications and Services is classified as class D.

There are five segmentation classifications and these classifications are rated from Class A to Class E. Each classification has contract and supplier management activities associated with it based on pre-determined weighted criteria.

Class A

Due to the unique and bespoke nature of the frameworks that fall within this class, a contract management plan to be developed and agreed with CSG.

Class B

Quarterly supplier contact, six monthly surveys, annual UIG, frequent support to councils, suppliers and external stakeholders requiring high level of procurement expertise, extensive contract monitoring.

Class C

Six monthly supplier contact, six monthly to annual surveys, annual UIG, regular support to councils, suppliers and external stakeholders requiring procurement expertise, high contract monitoring.

Class D

Annual supplier contact, annual surveys, optional annual UIG, ad-hoc support to councils, suppliers and external stakeholders potentially requiring procurement expertise, regular contract monitoring.

Class E

Annual supplier contact (if required), optional annual surveys, no requirement for annual UIG, straightforward ad-hoc support to councils, suppliers and potentially requiring procurement assistance, basic contract monitoring.



Scotland Excel

To: Executive Sub-Committee

On: Friday 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Tender: Supply and Delivery of Library Books and Textbooks

Schedule: 09/21

Period: 1 August 2022 until 31 July 2025 with an option to extend for up to 12 months until 31 July 2026

1. Introduction and Background

This recommendation is for the award of the third-generation renewal framework for the Supply and Delivery of Library Books and Textbooks.

This proposed renewal framework was advertised for the period from 1 August 2022 until 31 July 2025 with the option to extend for up to 12 months until 31 July 2026.

This framework will provide councils with a mechanism to procure a range of library books including but not limited to adult and children fiction and non-fiction books, reference books, foreign language books, audio books and large print books. Councils will also be able to procure a wide range of educational textbooks from various publishers. Users of the framework are likely to include public libraries, schools, nurseries and community centres.

2. Scope, Participation and Spend

As part of the strategy development, the User Intelligence Group (UIG) endorsed the inclusion of nineteen lots as summarised in Table 1.

Table 1: Lotting Structure

Lot No.	Description	Estimated % spend through lot
1	Adult Fiction and Non Fiction	22%
2	Childrens Fiction and Non Fiction	21%
3	Reference and Foreign Language Books	10%
4	General Books	20%
5	AudioBooks	2%
6	Large Print Books	5%
7 - 19	Educational Textbooks	20%

This lotting structure recognises the current landscape of the marketplace and is designed to align with council requirements, as well as maximising opportunities for Small and Medium Enterprises (SMEs).

The framework was advertised to enable access by all councils in Scotland. As detailed in Appendix 1. All 32 councils, the Advanced Procurement for Universities and Colleges (APUC) and National Health Service Scotland (NHSS) have confirmed their intention to participate in this framework.

The forecast annual spend for participating councils and associate members, with contingency, is £14 million per annum. This equates to an estimated spend of £56 million over the maximum 4-year term of the framework.

3. Procurement Process

A Prior Information Notice (PIN) was released on the Public Contracts Scotland portal on the 16th of July 2021 to inform the marketplace of Scotland Excel's intention to tender an opportunity for the supply and delivery of Library Books and Textbooks. Prospective bidders were given the opportunity to participate in a preliminary market consultation exercise in accordance with Regulation 41 of the Public Contracts (Scotland) Regulations 2015. This involved engagement in meetings and provision to Scotland Excel of information in relation to, but not limited to; market intelligence, market trends, sustainability initiatives and community benefits to help inform the strategy. Subsequently, 30 organisations noted interest in the market consultation meetings. The meetings concluded on the 7th of August. Six online meetings with different companies were held.

A User Intelligence Group (UIG) consisting of representatives from participating councils endorsed the procurement strategy (September 2021). In addition, a working group consisting of technical and procurement representatives was formed to review technical specifications and participate in the evaluation of offers submitted.

Scotland Excel has taken cognisance of the current situation and impact during the tender exercise of the Coronavirus pandemic. Balancing the current situation with the need to provide a route to market for councils seeking the continuation

of supply for Library Books and Textbooks in order to meet their statutory functions, and considering those council projects that may require to be undertaken in the future, Scotland Excel determined it was appropriate to undertake this renewal tender exercise and to recommend the establishment of this framework.

The Contract Notice was published via the Find A Tender and Public Contracts Scotland (PCS) portal on 24 February 2022, with the tender documentation being immediately available via the Public Contracts Scotland Tender (PCS-T) system.

As such, the tender exercise commenced after the UK withdrawal from the European Union and was conducted and concluded in accordance with the law and procedures currently in force.

The procurement process followed the open tender process to ensure maximum competition and the inclusion for all potential suppliers to service the framework. All bidders were examined against advertised selection criteria, using the Single Procurement Document (SPD), and award criteria, concurrently. The award criteria included technical and commercial sections that were evaluated against the following criteria and weightings:

Technical: 25%
Commercial: 75%

Within the technical section, bidders were required to evidence their knowledge and experience by responding to method statements which covered areas including Supply Chain, Added Value and Innovation, Service Delivery and Contract Management, Fair Work First, Sustainability, Library Staff Training and Processes and Relationships. Bidders were also assessed in terms of their ability to provide Community Benefits. These are detailed below within Table 2.

Table 2: Technical Section Weighting

Question	Description	Lot 1 – 6 Weighting	Lot 7 – 19 Weighting
1	Supply Chain, Added Value and Innovation	5	5
2	Service Delivery and Contract Management	4	4
3	Fair Work First	4	4
4	Sustainability	6	6
5	Community Benefits	3	3
6	Library Staff Training	3	-
7	Processes and Relationships	-	3
Total Score		25	25

Within the commercial section, bidders were invited to offer on a lot by lot basis for the lots set out in Table 1.

Commercial evaluations were undertaken on the basis of the percentage discount tenderers offered from the Recommended Retail Price ("RRP").

4. Report on Offers Received

The tender document was downloaded by 20 organisations, with 15 tender responses received by the specified closing date and time. A summary of all offers received is provided in Appendix 2.

Based on the criteria and scoring methodology set out in the tender document, a full evaluation of the compliant offers received was completed. Appendix 3 confirms the scoring achieved by each bidder.

5. Recommendations

Based on the evaluation undertaken, and in line with the advertised criteria and weightings summarised above, it is recommended that a multi-supplier framework arrangement is awarded to 15 suppliers across nineteen lots as outlined in Appendix 3.

The 15 recommended suppliers offer best value and represent a mix of small, medium and large organisations.

The range of suppliers recommended provides coverage for all awarding framework lots and competitive options for all participating councils as well as offering a degree of choice and capacity.

6. Benefits

Savings

Scotland Excel has conducted a benchmarking exercise comparing current prices paid with the prices submitted against the new framework. The result of this benchmarking is listed in Appendix 1. The projected average saving across all councils is 0.12%, which equates to an estimated total saving of approximately £16k per annum.

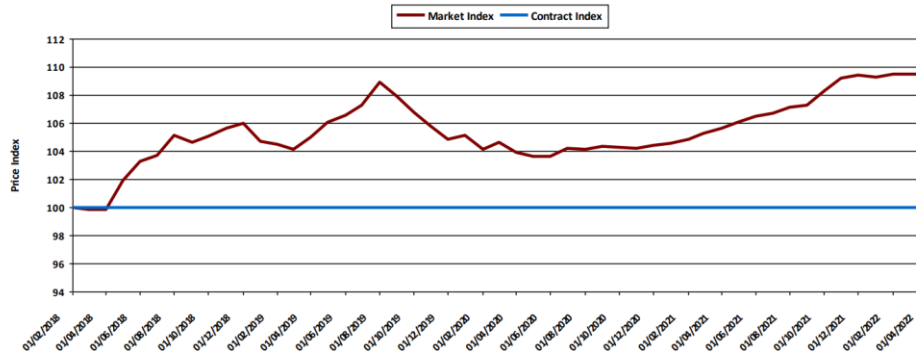
It should also be noted that the current framework contract is currently operating 9.5% under market conditions as detailed in the below indexation report. This saving is in addition to the conducted benchmarking exercise and is a result of tight contract management procedures.

Indexation Report - Library Books & Textbooks



Schedule No: 0617
Contract Title: Supply & Delivery Of Library Books & Textbooks
Contract Manager: Ewen MacLuskie
Start Date: 01/02/2018

Index	Type	Index Weighting (%)
Index Mundi - Wood Pulp	Standard	45
Consumer Price Index	Standard	45
Road Fuel - Diesel	Standard	10



Rebate

A rebate of 0.25% payable to Scotland Excel and 1.75% payable to councils will be applied to framework spend above £400,000 (excluding the initial £400,000) and will be calculated based upon total framework spend with the supplier reported through management information returns.

This streamlined rebate mechanism will provide a committed, greater financial return for our members than previous framework generations.

Price Stability

The framework applies twenty-four-month fixed pricing for all lots. Thereafter, all requests for price increases will be evaluated according to the Terms and Conditions of the framework and require to be supported by documentary evidence.

Sustainable Procurement Benefits

Within the technical section of the tender, an environmental practices and sustainability method statement assessed suppliers in relation to their corporate approach to environmental practices sustainability and how they manage the reduction of unnecessary waste, ensure recycling and reuse of packaging is carried out where possible, intend to reduce the use of single use plastics (SUP's) and identify alternatives to these products. A range of sustainable measures were outlined by suppliers including:

- A 'zero waste to landfill' status.
- Reducing SUP's and moving to biodegradable packaging products where possible.

- Print-On-Demand processes for both Physical Audio and Large Print Books ensuring wastage through redundant stock is completely eradicated.

Community Benefits

Scotland Excel is committed to maximising community benefit delivery for our members and local communities. Bidders were asked to confirm whether they were willing to comply with our community benefits approach for the lifetime of the framework. This approach is designed to deliver local community benefits based on individual member spend thresholds and 13 of the 15 recommended suppliers have confirmed their acceptance.

The community benefits approach focused on supporting the Scottish Government's National Performance Framework, and the benefits delivered should support, but are not limited to, the following indicators:

- Improve the skill profile of the population
- Improve levels of educational attainment
- Increase the proportion of young people in learning, training or work
- Improve people's perception of the quality of public services
- Reduce children's deprivation
- Increase cultural engagement

Suppliers have agreed to report ongoing delivery of community benefits to Scotland Excel on a six-monthly basis.

Delivery of commitments made will be monitored throughout the lifetime of the framework.

Fair Work Practices including the Real Living Wage

Scotland Excel and its members are committed to the delivery of high-quality public services and recognise that this is dependent on a workforce that is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and skills development, are diverse and is engaged in decision making. Within the technical section of the tender, bidders were assessed on their approach to fair work practices and payment of the Real Living Wage to their workforce. Of the 15 recommended bidders, 11 pay the Real Living Wage, as detailed in Appendix 4 - List of Recommended Suppliers with Living Wage Status.

Scotland Excel will continue to monitor Fair Work Practices including further uptake by suppliers committing to paying staff the Real Living Wage, through contract and supplier management activity.

7. Contract Mobilisation and Management

As part of the mobilisation process, all suppliers will be offered a contract mobilisation meeting to outline the operation of the framework, including roles and responsibilities, management information and community benefit commitments. Both suppliers and participating members will be issued with a mobilisation pack containing all required details to utilise the framework.

The framework has been established using a % discount off publishers' price to ensure councils have access to the required variety and scope of content.

In accordance with Scotland Excel's established contract and supplier management programme, in terms of risk and spend as detailed in Appendix 5, this framework is classified as class D. As such, it will require annual supplier meetings and surveys, and annual user group reviews as appropriate. During the current market conditions Scotland Excel will continue to engage with suppliers on a regular basis to manage the response to the pandemic and ensure continuity of this essential service delivery for our members.

Meetings and engagement undertaken with suppliers will adhere to all applicable health and safety guidelines.

8. Summary

This third-generation framework for the Supply and Delivery of Library Books and Textbooks continues to maximise collaboration, promote added value and deliver best value. A range of benefits can be reported in relation to savings, price stability, sustainability and community benefits.

The Executive Sub Committee is requested to approve the recommendation to award this framework agreement as detailed in Appendix 3 (Scoring and Recommendations).

Appendix 1 – Participation, Spend and Savings Summary Supply and Delivery of Library Books and Textbooks 0921

Member Name	Participation in Contract	Participation Entry Date	Estimated Annual Spend (£)	Source of Spend Data	Indexation (%)	% Estimated Forecast Savings	Estimated Annual Savings (£)	Basis of Savings Calculation
Aberdeen City Council	Yes	01 August 2022	£429,720	Suppliers MI	9.5%	0.12%	£516	Benchmarked Current Framework
Aberdeenshire Council	Yes	01 August 2022	£515,573	Suppliers MI	9.5%	0.12%	£619	Benchmarked Current Framework
Angus Council	Yes	01 August 2022	£224,053	Suppliers MI	9.5%	0.12%	£269	Benchmarked Current Framework
Argyll & Bute Council	Yes	01 August 2022	£155,668	Council Provided	9.5%	0.12%	£187	Benchmarked Current Framework
City of Edinburgh Council	Yes	01 August 2022	£1,042,920	Council Provided	9.5%	0.12%	£1,252	Benchmarked Current Framework
Clackmannanshire Council	Yes	01 August 2022	£183,179	Suppliers MI	9.5%	0.12%	£220	Benchmarked Current Framework
Comhairle nan Eilean Siar	Yes	01 August 2022	£46,450	Suppliers MI	9.5%	0.12%	£56	Benchmarked Current Framework
Dumfries & Galloway Council	Yes	01 August 2022	£290,660	Suppliers MI	9.5%	0.12%	£349	Benchmarked Current Framework
Dundee City Council	Yes	01 August 2022	£339,088	Suppliers MI	9.5%	0.12%	£407	Benchmarked Current Framework
East Ayrshire Council	Yes	01 August 2022	£134,275	Suppliers MI	9.5%	0.12%	£161	Benchmarked Current Framework
East Dunbartonshire Council	Yes	01 August 2022	£264,402	Suppliers MI	9.5%	0.12%	£317	Benchmarked Current Framework
East Lothian Council	Yes	01 August 2022	£218,044	Council Provided	9.5%	0.12%	£262	Benchmarked Current Framework
East Renfrewshire Council	Yes	01 August 2022	£254,137	Suppliers MI	9.5%	0.12%	£305	Benchmarked Current Framework
Falkirk Council	Yes	01 August 2022	£472,330	Suppliers MI	9.5%	0.12%	£567	Benchmarked Current Framework
Fife Council	Yes	01 August 2022	£483,244	Council Provided	9.5%	0.12%	£580	Benchmarked Current Framework
Glasgow City Council	Yes	01 August 2022	£1,087,726	Suppliers MI	9.5%	0.12%	£1,305	Benchmarked Current Framework
Highland Council	Yes	01 August 2022	£240,758	Suppliers MI	9.5%	0.12%	£289	Benchmarked Current Framework
Inverclyde Council	Yes	01 August 2022	£106,461	Council Provided	9.5%	0.12%	£128	Benchmarked Current Framework
Midlothian Council	Yes	01 August 2022	£158,815	Suppliers MI	9.5%	0.12%	£191	Benchmarked Current Framework
Moray Council	Yes	01 August 2022	£192,979	Suppliers MI	9.5%	0.12%	£232	Benchmarked Current Framework
North Ayrshire Council	Yes	01 August 2022	£552,244	Suppliers MI	9.5%	0.12%	£663	Benchmarked Current Framework
North Lanarkshire Council	Yes	01 August 2022	£723,660	Suppliers MI	9.5%	0.12%	£868	Benchmarked Current Framework
Orkney Islands Council	Yes	01 August 2022	£66,831	Suppliers MI	9.5%	0.12%	£80	Benchmarked Current Framework
Perth & Kinross Council	Yes	01 August 2022	£279,306	Suppliers MI	9.5%	0.12%	£335	Benchmarked Current Framework
Renfrewshire Council	Yes	01 August 2022	£423,821	Suppliers MI	9.5%	0.12%	£509	Benchmarked Current Framework
Scottish Borders Council	Yes	01 August 2022	£149,297	Suppliers MI	9.5%	0.12%	£179	Benchmarked Current Framework
Shetland Islands Council	Yes	01 August 2022	£64,186	Suppliers MI	9.5%	0.12%	£77	Benchmarked Current Framework
South Ayrshire Council	Yes	01 August 2022	£150,523	Council Provided	9.5%	0.12%	£181	Benchmarked Current Framework
South Lanarkshire Council	Yes	01 August 2022	£829,748	Suppliers MI	9.5%	0.12%	£996	Benchmarked Current Framework
Stirling Council	Yes	01 August 2022	£162,640	Suppliers MI	9.5%	0.12%	£195	Benchmarked Current Framework
West Dunbartonshire Council	Yes	01 August 2022	£202,371	Suppliers MI	9.5%	0.12%	£243	Benchmarked Current Framework
West Lothian Council	Yes	01 August 2022	£347,403	Suppliers MI	9.5%	0.12%	£417	Benchmarked Current Framework
Tayside Contracts	Yes	01 August 2022	£0	Suppliers MI	9.5%	0.12%	£0	Benchmarked Current Framework
Totals			£10,792,512			0.12%	£12,951	
Associate Members	Yes	01 August 2022	£2,901,489	Suppliers MI	9.5%	0.12%	£3,482	Benchmarked Current Framework
Totals			£13,694,001			0.12%	£16,433	

Appendix 2 – Summary of Offers Received

Name of Tenderer	SME Status	Location	Lot(s) Tendered	Lot(s) Awarded
Askews and Holts Library Services Ltd.	Medium	Eastbourne, East Sussex	1-4	1-4
Blackwell UK Limited	Micro	Broad Street, Oxford	7-19	7-19
Bright Red Publishing Limited	Micro	City of Edinburgh	8	8
A.T. Little & Sons Limited t/a Browns Books	Medium	Melton, East Yorkshire	1-4, 7-18	1-4, 7-18
EBSCO International Inc.	Large	Enfield, England	1-4, 7-18	1-4, 7-18
Glowworm Books and Gifts Limited	Micro	West Lothian	7-19	7-19
Hodder & Stoughton Limited t/a Hodder Education	Large	London	11, 18	11, 18
Kelvin Books Limited	Small	Glasgow City	7-13, 15-18	7-13, 15-18
The Chancellor, Masters and Scholars of the University of Oxford - Trading as Oxford University Press	Medium	Oxford	7, 14, 15	7, 14, 15
Peters Limited	Medium	Birmingham	1, 2, 4	1, 2, 4
Scotia & Chameleon Books Ltd.	Micro	North Lanarkshire	2-5, 7-18	2-5, 7-18
Star Books, A Partnership	Micro	London	3	3
Ulverscroft Limited	Medium	Leicester, Leicestershire	5, 6	5, 6
Waterstones Booksellers Limited	Large	Piccadilly, London	7-16, 18	7-16, 18
W F Howes Limited	Medium	Leicester, Leicestershire	5, 6	5, 6

Appendix 3 - Scoring and Recommendations

LOT 1 – ADULT FICTION AND NON-FICTION BOOKS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	97.36	Yes
Askews and Holts Library Services Ltd.	91.33	Yes
Peters Limited	84.13	Yes
EBSCO International Inc.	61.32	Yes

LOT 2 – CHILDRENS FICTION AND NON-FICTION BOOKS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	97.36	Yes
Askews and Holts Library Services Ltd.	91.33	Yes
Peters Limited	84.13	Yes
EBSCO International Inc.	61.32	Yes
Scotia & Chameleon Books Ltd.	50.70	Yes

LOT 3 – REFERENCE AND FOREIGN LANGUAGE BOOKS		
Tenderer	SCORE	Awarded (Yes/No)
Star Books, A Partnership	92.33	Yes
A.T. Little & Sons Limited t/a Browns Books	72.08	Yes
EBSCO International Inc.	52.65	Yes
Askews and Holts Library Services Ltd.	50.50	Yes
Scotia & Chameleon Books Ltd.	26.53	Yes

LOT 4 – GENERAL LIBRARY BOOKS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	97.45	Yes
Askews and Holts Library Services Ltd.	91.33	Yes
Peters Limited	84.13	Yes
EBSCO International Inc.	56.32	Yes
Scotia & Chameleon Books Ltd.	50.70	Yes

LOT 5 – AUDIOBOOKS		
Tenderer	SCORE	Awarded (Yes/No)
Scotia & Chameleon Books Ltd.	77.50	Yes
W F Howes Limited	76.50	Yes
Ulverscroft Limited	70.75	Yes

LOT 6 – LARGE PRINT BOOKS		
Tenderer	SCORE	Awarded (Yes/No)
W F Howes Limited	90.50	Yes
Ulverscroft Limited	89.59	Yes

LOT 7 – GENERAL TEXTBOOKS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	87.79	Yes
Glowworm Books and Gifts Limited	87.77	Yes
Waterstones Booksellers Limited	62.35	Yes
EBSCO International Inc.	57.30	Yes
Blackwell UK Limited	54.69	Yes
The Chancellor, Masters and Scholars of the University of Oxford - Trading as Oxford University Press	45.04	Yes
Kelvin Books Limited	36.55	Yes
Scotia & Chameleon Books Ltd.	25.02	Yes

LOT 8 – BRIGHT RED PUBLISHING		
Tenderer	SCORE	Awarded (Yes/No)
Bright Red Publishing Limited	88.28	Yes
A.T. Little & Sons Limited t/a Browns Books	86.55	Yes
Glowworm Books and Gifts Limited	84.25	Yes
EBSCO International Inc.	80.33	Yes
Waterstones Booksellers Limited	78.98	Yes
Kelvin Books Limited	77.21	Yes
Blackwell UK Limited	71.57	Yes
Scotia & Chameleon Books Ltd.	33.46	Yes

LOT 9 – CAPSTONE GLOBAL LIBRARY		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Glowworm Books and Gifts Limited	80.92	Yes
EBSCO International Inc.	79.00	Yes
Waterstones Booksellers Limited	62.32	Yes
Blackwell UK Limited	58.24	Yes
Kelvin Books Limited	55.88	Yes
Scotia & Chameleon Books Ltd.	51.79	Yes

LOT 10 – HARPER COLLINS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	90.44	Yes
Glowworm Books and Gifts Limited	84.25	Yes
Waterstones Booksellers Limited	75.09	Yes
EBSCO International Inc.	63.22	Yes
Blackwell UK Limited	56.02	Yes
Scotia & Chameleon Books Ltd.	49.01	Yes
Kelvin Books Limited	45.32	Yes

LOT 11 – HODDER GIBSON		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Blackwell UK Limited	80.91	Yes
Hodder & Stoughton Limited t/a Hodder Education	72.75	Yes
Glowworm Books and Gifts Limited	70.25	Yes
Waterstones Booksellers Limited	69.65	Yes
Kelvin Books Limited	61.81	Yes
EBSCO International Inc.	43.00	Yes
Scotia & Chameleon Books Ltd.	38.13	Yes

LOT 12 – JOLLY LEARNING		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
EBSCO International Inc.	67.50	Yes
Waterstones Booksellers Limited	64.40	Yes
Blackwell UK Limited	59.91	Yes
Glowworm Books and Gifts Limited	58.00	Yes
Kelvin Books Limited	57.96	Yes
Scotia & Chameleon Books Ltd.	27.63	Yes

LOT 13 – MCGRAW HILL		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
EBSCO International Inc.	89.39	Yes
Waterstones Booksellers Limited	89.29	Yes
Blackwell UK Limited	79.81	Yes
Glowworm Books and Gifts Limited	69.15	Yes
Kelvin Books Limited	55.39	Yes
Scotia & Chameleon Books Ltd.	37.58	Yes

LOT 14 – NELSON THORNES		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Blackwell UK Limited	88.54	Yes
Glowworm Books and Gifts Limited	79.48	Yes
The Chancellor, Masters and Scholars of the University of Oxford - Trading as Oxford University Press	78.89	Yes
Scotia & Chameleon Books Ltd.	73.76	Yes
Waterstones Booksellers Limited	68.38	Yes
EBSCO International Inc.	44.91	Yes

LOT 15 – OXFORD UNIVERSITY PRESS		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Waterstones Booksellers Limited	78.98	Yes
EBSCO International Inc.	65.67	Yes
Blackwell UK Limited	58.24	Yes
The Chancellor, Masters and Scholars of the University of Oxford - Trading as Oxford University Press	48.58	Yes
Glowworm Books and Gifts Limited	48.42	Yes
Kelvin Books Limited	39.21	Yes
Scotia & Chameleon Books Ltd.	26.79	Yes

LOT 16 – PEARSON EDUCATION LTD		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Blackwell UK Limited	80.91	Yes
Kelvin Books Limited	70.21	Yes
Waterstones Booksellers Limited	69.65	Yes
Glowworm Books and Gifts Limited	64.65	Yes
EBSCO International Inc.	62.60	Yes
Scotia & Chameleon Books Ltd.	38.13	Yes

LOT 17 – PRIM-ED PUBLISHING		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Glowworm Books and Gifts Limited	84.25	Yes
EBSCO International Inc.	82.20	Yes
Blackwell UK Limited	80.91	Yes
Kelvin Books Limited	70.21	Yes
Scotia & Chameleon Books Ltd.	38.13	Yes

LOT 18 – RISING STARS UK		
Tenderer	SCORE	Awarded (Yes/No)
A.T. Little & Sons Limited t/a Browns Books	98.21	Yes
Glowworm Books and Gifts Limited	64.25	Yes
Waterstones Booksellers Limited	62.32	Yes
EBSCO International Inc.	60.67	Yes
Blackwell UK Limited	58.24	Yes
Scotia & Chameleon Books Ltd.	51.79	Yes
Hodder & Stoughton Limited t/a Hodder Education	50.08	Yes
Kelvin Books Limited	47.54	Yes

LOT 19 – P&N PUBLICATIONS		
Tenderer	SCORE	Awarded (Yes/No)
Blackwell UK Limited	94.91	Yes
Glowworm Books and Gifts Limited	66.75	Yes

Appendix 4- List of Recommended Suppliers with Living Wage Status

Tenderer	Accredited	Currently progressing through Real Living Wage accreditation process	Pay Real Living Wage to all employees, and committed to gaining accreditation over the initial 2 years of framework	Pay Real Living Wage to all employees, but not accredited	Neither accredited nor paying Real Living Wage, but do commit to pay the Real Living Wage to all employees over the initial 2 years of the framework	Neither accredited nor paying Real Living Wage
Askews and Holts Library Services Ltd.						Yes
Blackwell UK Limited						Yes
Bright Red Publishing Limited				Yes		
A.T. Little & Sons Limited t/a Browns Books				Yes		
EBSCO International Inc.						Yes
Glowworm Books and Gifts Limited				Yes		
Hodder & Stoughton Limited t/a Hodder Education				Yes		
Kelvin Books Limited	Yes					
The Chancellor, Masters and Scholars of the University of Oxford - Trading as Oxford University Press				Yes		
Peters Limited				Yes		
Scotia & Chameleon Books Ltd.				Yes		
Star Books International Ltd				Yes		
Ulverscroft Limited				Yes		
Waterstones Booksellers Limited						Yes
W F Howes Limited				Yes		

Appendix 5 – Segmentation classifications

0921 Supply and Delivery of Library Books and Textbooks is classified as class D.

There are five segmentation classifications and these classifications are rated from Class A to Class E. Each classification has contract and supplier management activities associated with it based on pre-determined weighted criteria.

Class A

Due to the unique and bespoke nature of the frameworks that fall within this class, a contract management plan to be developed and agreed with CSG.

Class B

Quarterly supplier contact, six monthly surveys, annual UIG, frequent support to councils, suppliers and external stakeholders requiring high level of procurement expertise, extensive contract monitoring.

Class C

Six monthly supplier contact, six monthly to annual surveys, annual UIG, regular support to councils, suppliers and external stakeholders requiring procurement expertise, high contract monitoring.

Class D

Annual supplier contact, annual surveys, optional annual UIG, ad-hoc support to councils, suppliers and external stakeholders potentially requiring procurement expertise, regular contract monitoring.

Class E

Annual supplier contact (if required), optional annual surveys, no requirement for annual UIG, straightforward ad-hoc support to councils, suppliers and potentially requiring procurement assistance, basic contract monitoring.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Tender: Electric Vehicle Charging Infrastructure

Schedule: 2119

Period: Two years from commencement date with an option to extend for up to two twelve-month periods.

1. Introduction and Background

This recommendation is for the award of the first-generation framework for Electric Vehicle Charging Infrastructure.

This proposed framework will be for a period of two years from the commencement date with an option to extend for up to two twelve-month periods. Subject to approval and completion of a standstill period, the framework is intended to commence on 12th May 2022.

This framework will provide participating members, councils and other bodies with a mechanism to procure a range of works, products and services, including the supply, installation and maintenance of electric vehicle charging equipment and associated items (e.g., feeder cabinets) for depots, fleets, on-street and off-street requirements.

The framework will provide councils and other participating bodies with a mechanism to develop and enhance electric vehicle charging infrastructure, which is required across Scotland to facilitate the uptake of ultra-low emission vehicles (ULEVs). It will support the Scottish Government Climate Change Plans' objective of eliminating the need for any new petrol and diesel light commercial vehicles in Scotland's public sector fleet by 2025 and, creates the conditions to eliminate the need for all new petrol and diesel vehicles by 2030¹.

This will contribute to the 2045 net-zero emissions target as defined by the Climate Change (Emissions Reduction Targets) (Scotland) Act 2019.

2. Scope, Participation and Spend

¹ <https://www.gov.scot/publications/securing-green-recovery-path-net-zero-update-climate-change-plan-20182032/pages/9/>

As part of the strategy development, the User Intelligence Group (UIG) endorsed the inclusion of 4 lots as summarised in Table 1.

Table 1: Lotting Structure

Lot No.	Description	Estimated % of Spend through lot
Lot 1	Supply, Installation and Maintenance of Electric Vehicle Charging Equipment and Associated Items	60%
Lot 2	Supply Only of Electric Vehicle Charging Equipment and Associated Items	20%
Lot 3	Installation of Electric Vehicle Charging Equipment and Associated Items	10%
Lot 4	Maintenance of Electric Vehicle Charging Equipment and Associated Items	10%

The lotting structure was designed to be representative of the marketplace as well as maximising opportunities for Small to Medium Sized Enterprises (SMEs) to bid.

Lots 1, 3 and 4 were evaluated on a region-by-region basis and will be awarded on a regional basis.

Six regions have been established for lots 1, 3 and 4. The regions are comprised of council areas grouped together by reference to geographical features. Tenderers had to indicate that they are able to service at least one council area in a region in order to be eligible for evaluation for that region.

The regions and their constituent council areas are shown below:

- **Region 1 – Central:** Clackmannanshire, Falkirk, Fife, Stirling, West Lothian
- **Region 2 - Highlands and Islands:** Argyll and Bute, Highland, Orkney, Shetland, Comhairle nan Eilean Siar, The Moray
- **Region 3 - North East:** Aberdeen City, Aberdeenshire, Angus, Dundee, Perth & Kinross
- **Region 4 - South East:** East Lothian, Edinburgh, Midlothian, Scottish Borders

- **Region 5 – South West:** East Dunbartonshire, East Renfrewshire, Glasgow, North Lanarkshire, Renfrewshire, West Dunbartonshire
- **Region 6 – South:** Dumfries & Galloway, East Ayrshire, South Ayrshire, South Lanarkshire, Inverclyde, North Ayrshire

As detailed in Appendix 1 – Participation and Spend Summary, all 32 councils are anticipated to participate in this framework.

In addition, NHS, APUC, Scottish Prison Service, Police Scotland and Scottish Ambulance Service have indicated their intention to participate.

The forecast annual spend for participating councils and associate members, with contingency for any unprojected spend is £20 million per annum. This equates to an estimated spend of £80 million in total over the maximum four-year term of the framework (if the extension options are exercised).

3. Procurement Process

A UIG consisting of representatives from participating members endorsed the procurement strategy. In addition, a technical group was formed to assist in the development of technical specifications and commercial offers and participate in the evaluation process.

Scotland Excel has taken cognisance of the current situation and the need to balance the impact of the Coronavirus pandemic during the tender exercise with the need to provide a route to market for councils seeking the supply, installation and maintenance of electric vehicle charging equipment and associated items. Following consultation with stakeholders, Scotland Excel determined it was appropriate to undertake this tender exercise and recommend the establishment of this framework.

A Prior Information Notice (PIN) was published on 28th April 2021, which resulted in expressions of interest from 192 suppliers. The Contract Notice was published via the Find A Tender and Public Contracts Scotland (PCS) portal on 23rd November 2021, with the tender documentation being immediately available via the Public Contracts Scotland Tender (PCS-T) system. The tender exercise was conducted and concluded in accordance with the law and procedures currently in force.

The procurement process followed the open tender process to ensure maximum competition and the inclusion for all potential suppliers to service the framework. All tenderers were examined against selection criteria, using the Single Procurement Document (SPD) and award criteria, concurrently.

The award criteria included technical and commercial sections that were evaluated against the following criteria and weightings for lots 1, 3 and 4:

Technical: 40%
Commercial: 60%

The award criteria included technical and commercial sections that were evaluated against the following criteria and weightings for lot 2:

Technical: 30%
Commercial: 70%

Within the technical section, tenderers were required to evidence their knowledge and experience by responding to method statements. These statements covered supply chain risk, sustainability and environment, service, expertise, project management, accessibility, risk mitigation and fair work practices. Tenderers were also assessed in relation to their conformance to an updated community benefit approach. These elements were scored in accordance with the published methodology, summarised in Table 2.

Table 2: Technical Section Scoring

Questions (ALL LOTS)	Lots 1, 3 and 4 - Max Score	Lot 2 - Max Score
Method Statement 1 – Supply Chain Risk	4	4
Method Statement 2 – Sustainability and Environment	12	12
Method Statement 3 – Service	6	6
Method Statement 4 – Expertise, Project Management, Accessibility and Risk Mitigation	10	N/A
Method Statement 5 – Community Benefits	4	4
Method Statement 6 – Fair Work First	4	4
Total	40	30

Within the commercial section, tenderers' commercial scores were evaluated on a lot-by-lot basis (and on a region-by region basis for lots 1, 3 and 4), in accordance with the published methodology.

Tenderers were required to indicate the lots for which they were bidding, and the council areas (or where appropriate geographical regions) which they had an ability to service.

Lots 1, 3 and 4 were evaluated on a region-by-region basis and will be awarded on a regional basis. Six regions have been established for lots 1, 3 and 4 and these are detailed above in Section 2 of this report. Each region offer was evaluated independently.

The evaluation of the commercial section involved different approaches in different lots. For lot 1, a scenario-based approach was adopted for each region; for lot 2, a line-by-line item evaluation was undertaken; and, for lots 3 and 4, a line-by-line evaluation was adopted for each region.

Certain minimum requirements were set for commercial submissions in relation to each lot, however, Scotland Excel reserved a discretion to consider offers which did not comply with the minimum requirements, all as detailed in the published tender documents.

4. Report on Offers Received

The tender was accessed by 147 organisations, with 42 tender responses received by the specified closing date and time. A summary of offers received is provided in Appendix 2.

Based on the criteria and scoring methodology set out in the tender document, a full evaluation of the offers received was completed. Appendix 3 confirms the scoring achieved by each tenderer in each lot and region.

5. Recommendations

Based on the evaluation undertaken, and in line with the criteria and weightings set out above, it is recommended that a multi-supplier framework arrangement is awarded to 33 suppliers across 4 lots as outlined in Appendix 3.

The recommended suppliers provide the choice, scope and range of works, products and services for the supply, installation and maintenance of electric vehicle charging equipment and associated items required by councils as well as representing best value and providing geographical coverage.

The above recommendation is subject to confirmation to Scotland Excel's satisfaction, that the recommended suppliers hold insurance in accordance with the published tender requirements.

6. Benefits

Savings

This framework will be used by councils to raise projects, given the bespoke nature of each works package no benchmarking was possible prior to recommendations being made.

Market analysis has highlighted adverse effects on the electric vehicle charging infrastructure market of the ongoing challenging conditions faced by manufacturers and suppliers over the course of the last twelve-months. The main drivers affecting costs and delivery lead times are a demand for raw materials employed in the manufacturing processes of electric vehicle chargers and related components, the global semiconductor chip shortage and a spike in product demand.

Throughout the lifetime of this framework, market conditions will be monitored and reported via the annual reporting process alongside regular review of market intelligence and use of the indexation tool to observe identified cost drivers and market trends.

Market analysis and stakeholder engagement suggest that councils will mainly use the competitive selection procedure to obtain best value as most procurements of this type are of a bespoke nature to meet specific council requirements.

Price Stability

The framework applies 12 months' fixed pricing for rates and people rates.

All future requests for price variances will be considered in line with annual increases in inflation and in accordance with established price variance process set out within the contract. In summary all price increase requests will require supporting documentary evidence, and inflation will be measured with reference to the Consumer Price Index as published by the Office for National Statistics and tracked in accordance with Scotland Excel's indexation model.

Rebate

A rebate of 0.5% payable to Scotland Excel will be applied to all work orders issued under the framework contract of £100,000 and above which will be tracked and managed with contractors through reporting of the management information returns.

Sustainable Procurement Benefits

Within the technical section of the tender, one of the method statements assessed tenderers in relation to their corporate approach to sustainability and how they promote recycle, reuse and reduce initiatives to minimise the impact of their activities on the environment and support the development of Scotland's circular economy. A range of sustainable measures were outlined by tenderers including:

- Waste management and reduction processes.
- Safe disposal of Waste, Electrical and Electronic Equipment (WEEE).
- Use of recyclable packaging and packaging take-back schemes.
- Transport strategies to reduce the environmental impact of transportation.
- Use of ULEVs for service delivery.
- Carbon monitoring and policy/strategy to reduce carbon footprint.

Community Benefits

Scotland Excel is committed to maximising community benefit delivery for our members. Tenderers were asked to confirm their willingness to comply with our community benefits approach for the lifetime of the framework. This approach is designed to deliver local community benefits based on individual member requirements. All 33 tenderers recommended for award confirmed their acceptance.

The community benefits approach focused on supporting the Scottish Government's National Performance Framework, and the benefits delivered should support, but are not limited to, the following indicators:

- Carbon footprint
- Entrepreneurial activity
- Waste generated

Tenderers have agreed to report ongoing delivery of community benefits to Scotland Excel on a six-monthly basis.

Delivery of commitments made will be monitored throughout the lifetime of the framework.

Fair Work First including the Real Living Wage

Scotland Excel and its members are committed to the delivery of high-quality public services and recognise that this is dependent on a workforce that is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and skills development, are diverse and is engaged in decision making.

Within the technical section of the tender, tenderers were assessed on their approach to fair work practices and asked to confirm their status in relation to the payment of the Real Living Wage to their workforce. Of the 33 recommended suppliers, 28 pay the Real Living Wage to their workforce with 15 being either accredited or working towards accreditation as detailed in Appendix 4 – List of Recommended Suppliers with Real Living Wage Status.

Scotland Excel will continue to monitor fair work practices including further uptake by suppliers committing to paying staff the Real Living Wage, through contract and supplier management activity.

7. Contract Mobilisation and Management

As part of the mobilisation process, all suppliers will be offered a contract mobilisation meeting to outline the operation of the framework, including roles and responsibilities, management information and community benefit

commitments. Both suppliers and participating members will be issued with a mobilisation pack containing all required details to utilise the framework.

In accordance with Scotland Excel's established contract and supplier management programme, in terms of risk and spend as detailed in Appendix 5, this framework is classified as class B. As such, it will require quarterly supplier contact, annual UIG and frequent support to councils, suppliers and external stakeholders. During the current market conditions Scotland Excel will continue to engage with suppliers on a regular basis to manage the response to the pandemic and ensure continuity of service delivery for our members.

Meetings and engagement undertaken with suppliers will adhere to all applicable health and safety guidelines.

8. Summary

This first-generation framework for Electric Vehicle Charging Infrastructure aims to maximise collaboration, and facilitate the procurement of a range of works, products and services, including the supply, installation and maintenance of electric vehicle charging equipment and associated items for depots, fleets, on-street and off-street requirements. Furthermore, it promotes added value in terms of sustainability and supports the public sector in meeting its net-zero targets.

The Executive Sub Committee is requested to approve the recommendation detailed in Section 5 of this report to award this framework agreement as detailed in Appendix 3 (Scoring and Recommendations).

Appendix 1 – Participation and Spend Summary
Electric Vehicle Charging Infrastructure 2119

COUNCIL	PARTICIPATION STATUS	PARTICIPATION ENTRY DATE	ESTIMATED ANNUAL SPEND	SOURCE OF SPEND DATA
ABERDEEN CITY COUNCIL	YES	Framework Start Date	£76,000	Council
ABERDEENSHIRE COUNCIL	YES	Framework Start Date	£500,000	Council
ANGUS COUNCIL	YES	Framework Start Date	£124,020	Council
ARGYLL & BUTE COUNCIL	YES	Framework Start Date	£200,000	Historical spend based on Spikes Cavell
CITY OF EDINBURGH COUNCIL	YES	Framework Start Date	£200,000	
CLACKMANNANSHIRE COUNCIL	YES	Framework Start Date	£50,000	Council
COMHAIRLE NAN EILEAN SIAR	YES	Framework Start Date	£100,000	Council
DUMFRIES & GALLOWAY COUNCIL	YES	Framework Start Date	£640,000	Council
DUNDEE CITY COUNCIL	YES	Framework Start Date	£100,000	Council
EAST Ayrshire Council	YES	Framework Start Date	£250,000	Council
EAST DUNBARTONSHIRE COUNCIL	YES	Framework Start Date	£250,000	Council
EAST Lothian Council	YES	Framework Start Date	£260,000	Council
EAST RENFREWSHIRE COUNCIL	YES	Framework Start Date	£150,000	Council
FALKIRK COUNCIL	YES	Framework Start Date	£90,000	Council
FIFE COUNCIL	YES	Framework Start Date	£50,000	Council
GLASGOW CITY COUNCIL	YES	Framework Start Date	£1,030,000	Council
HIGHLAND COUNCIL	YES	Framework Start Date	£200,000	Council
INVERCLYDE COUNCIL	YES	Framework Start Date	£115,000	Council
MIDLOTHIAN COUNCIL	YES	Framework Start Date	£30,000	Council
MORAY COUNCIL	YES	Framework Start Date	£200,000	Council
NORTH Ayrshire Council	YES	Framework Start Date	£510,000	Council
NORTH LANARKSHIRE COUNCIL	YES	Framework Start Date	TBC	Council
ORKNEY ISLANDS COUNCIL	YES	Framework Start Date	£145,000	Council
PERTH & KINROSS COUNCIL	YES	Framework Start Date	£216,430	Council
RENFREWSHIRE COUNCIL	YES	Framework Start Date	£250,000	Council
SCOTTISH BORDERS COUNCIL	YES	Framework Start Date	£200,000	Historical spend based on Spikes Cavell
SHETLAND ISLANDS COUNCIL	YES	Framework Start Date	£11,500	
SOUTH Ayrshire Council	YES	Framework Start Date	£75,000	Historical spend based on Spikes Cavell
SOUTH LANARKSHIRE COUNCIL	YES	Framework Start Date	£1,100,000	
STIRLING COUNCIL	YES	Framework Start Date	£1,477,500	Council
WEST DUNBARTONSHIRE COUNCIL	YES	Framework Start Date	TBC	Council
WEST Lothian Council	YES	Framework Start Date	£170,000	Council
TAYSIDE CONTRACTS	YES	Framework Start Date	TBC	Council
OTHER PARTICIPATING BODIES			£2,000,000	Other Participating Bodies
TOTAL			£10,770,450	

Appendix 2 - Summary of Offers Received

Where the lots and regions tendered/awarded are indicated by using a combination of a number, the letter R and a second number, the first number represents the lot number, while the second the region number.

For example, 3R4 means “lot **3**, Region **4**”.

Tenderer	SME Status	Location	Lots and Regions Tendered	Lots and Regions Awarded
Bmm Energy Solutions Ltd	Small	Scotland - Glasgow and Strathclyde	1R1, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R3, 3R4, 3R5, 3R6, 4R1, 4R3, 4R4, 4R5, 4R6	1R1, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R3, 3R4, 3R5, 3R6
Boyd Brothers (Fauldhouse) Ltd	Small	Scotland - Edinburgh and Lothians	3R1, 3R2, 3R3, 3R4, 3R5, 3R6	3R1, 3R2, 3R3, 3R4, 3R5, 3R6
Centregreat Limited	Medium	Scotland - Scotland South	1R1, 1R4, 1R5, 1R6, 3R1, 3R4, 3R5, 3R6, 4R1, 4R4, 4R5, 4R6	1R1, 1R4, 1R5, 1R6, 4R1, 4R4, 4R5, 4R6
Charge ELV Limited	Micro	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	-
Chargemaster Ltd t/a bp pulse	Large	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
Cherry & White Ltd*	Small	England	2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6	-
City Electrical Factors Limited	Large	England	2	2
Connected Kerb Limited	Medium	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
E&S Utilities Limited t/a Powertek Utilities	Medium	Scotland - Glasgow and Strathclyde	3R1, 3R3, 3R4, 3R5, 3R6	-
Easy Heat Systems Ltd	Medium	Scotland - Tayside, Central and Fife	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2
Edmundson Electrical Ltd	Large	Scotland - Glasgow and Strathclyde	2	2
EJ Parker Technical Services (Scotland South) Ltd	Medium	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	-
Enerveo Limited	Large	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
Entrust Smart Home Microgrid Ltd	Micro	England	2	2

Everwarm Ltd	Large	Scotland - Edinburgh and Lothians	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
Gilbarco Veeder-Root Limited	Large	England	2, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	2, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
GPH Builders Merchants Ltd	Medium	Scotland – Aberdeen and North East	2	2
James M Anderson Ltd	Small	Scotland - Glasgow and Strathclyde	2	-
John G. Mackintosh Limited	Medium	Scotland - Edinburgh and Lothians	2, 3R1, 3R4	3R1, 3R4
Jorro Ltd	Micro	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
Juuce Ltd t/a EO Charging	Medium	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2
Liberty Charge Limited	Large	England	1R1, 1R3, 1R4, 1R5, 1R6	1R1, 1R3, 1R4, 1R5, 1R6
MER FLEET SERVICES LIMITED	Medium	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	-
Metric Group Ltd	Medium	England	2	2
Morrison Energy Services Ltd	Large	England	1R1, 1R4, 1R5, 1R6, 3R1, 3R4, 3R5, 3R6	1R1, 1R4, 1R5, 1R6
MP Group U K Ltd	Small	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6
Munro Wilson Limited	Micro	Scotland – Scotland South	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
Phoenix Utilities Ltd	Small	Scotland - Glasgow and Strathclyde	3R1, 3R3, 3R4, 3R5, 3R6	-
Procast Energy Services Ltd	Small	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
Rexel UK Limited	Large	England	2	2

Ross-Shire Engineering Ltd	Large	Scotland – Highlands and Islands	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
Saltire Facilities Management Ltd	Medium	Scotland - Glasgow and Strathclyde	1R1, 1R4, 1R5, 1R6	1R1, 1R4, 1R5, 1R6
ScottishPower Energy Retail Limited	Large	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6
SSUK Ltd	Small	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
Story Contracting Ltd	Large	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2
SWARCO UK LIMITED	Medium	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6
The Aluminium Lighting Company Ltd.	Small	Wales	2	-
Valley Group Limited	Small	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6
W.G.M (ENGINEERING)LIMITED	Large	Scotland - Glasgow and Strathclyde	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 3R1, 3R2, 3R3, 3R4, 3R5, 3R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
WB Electrical Services Ltd	Micro	Scotland - Glasgow and Strathclyde	1R1, 1R4, 1R5, 1R6	-
Yunex Limited	Large	England	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 2, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6	1R1, 1R2, 1R3, 1R4, 1R5, 1R6, 4R1, 4R2, 4R3, 4R4, 4R5, 4R6
Zaptec U.K. Ltd	Large	England	2	2

*Consortium bid
composed of:

Cherry & White Ltd
(02468825)

Worldnetwork Ltd
(06977164)

Appendix 3 - Scoring and Recommendations

LOT 1 – SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 1 – Central (Clackmannanshire, Falkirk, Fife, Stirling, West Lothian)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	95.50	Yes
Jorro Ltd	80.34	Yes
Easy Heat Systems Ltd	75.14	Yes
Procast Energy Services Ltd	74.16	Yes
Ross-Shire Engineering Ltd	73.79	Yes
Everwarm Ltd	72.91	Yes
Liberty Charge Limited	69.79	Yes
Saltire Facilities Management Ltd	64.97	Yes
SWARCO UK LIMITED	64.61	Yes
Yunex Limited	63.96	Yes
SSUK Ltd	63.81	Yes
Story Contracting Ltd	63.76	Yes
Connected Kerb Limited	62.90	Yes
Juuce Ltd t/a EO Charging	62.58	Yes
Chargemaster Ltd t/a bp pulse	60.55	Yes
ScottishPower Energy Retail Limited	59.48	Yes
Centregreat Limited	58.22	Yes
Munro Wilson Limited	56.74	Yes
Enerveo Limited	56.41	Yes
Morrison Energy Services Ltd	56.37	Yes
W.G.M (ENGINEERING)LIMITED	56.20	Yes
MP Group U K Ltd	51.46	Yes
BMM Energy Solutions Ltd	51.37	Yes
EJ Parker Technical Services (Scotland South) Ltd	46.66	No
WB Electrical Services Ltd	36.89	No
Charge ELV Limited	27.62	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 1 - SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 2 - Highlands and Islands (Argyll and Bute, Highland, Orkney, Shetland, Comhairle nan Eilean Siar, The Moray)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	94.96	Yes
Jorro Ltd	90.11	Yes
Easy Heat Systems Ltd	86.30	Yes
Ross-Shire Engineering Ltd	82.31	Yes
Procast Energy Services Ltd	80.81	Yes
Everwarm Ltd	73.21	Yes
Juuce Ltd t/a EO Charging	70.21	Yes
SSUK Ltd	69.86	Yes
Connected Kerb Limited	67.78	Yes
SWARCO UK LIMITED	66.29	Yes
Yunex Limited	65.34	Yes
Chargemaster Ltd t/a bp pulse	63.92	Yes
Story Contracting Ltd	62.87	Yes
ScottishPower Energy Retail Limited	61.12	Yes
W.G.M (ENGINEERING)LIMITED	60.14	Yes
Munro Wilson Limited	58.69	Yes
Enerveo Limited	57.27	Yes
MP Group U K Ltd	54.14	Yes
EJ Parker Technical Services (Scotland South) Ltd	48.23	No
Charge ELV Limited	33.73	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 1 - SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 3 - North East (Aberdeen City, Aberdeenshire, Angus, Dundee, Perth & Kinross)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	95.50	Yes
Jorro Ltd	83.49	Yes
Ross-Shire Engineering Ltd	75.11	Yes
Everwarm Ltd	74.74	Yes
Procast Energy Services Ltd	73.82	Yes
Liberty Charge Limited	72.30	Yes
SSUK Ltd	68.24	Yes

SWARCO UK LIMITED	66.09	Yes
Yunex Limited	65.68	Yes
Juuce Ltd t/a EO Charging	64.99	Yes
Connected Kerb Limited	64.92	Yes
Story Contracting Ltd	63.54	Yes
Chargemaster Ltd t/a bp pulse	60.97	Yes
ScottishPower Energy Retail Limited	60.82	Yes
Munro Wilson Limited	59.18	Yes
Enerveo Limited	58.36	Yes
W.G.M (ENGINEERING)LIMITED	56.54	Yes
BMM Energy Solutions Ltd	53.86	Yes
MP Group U K Ltd	52.29	Yes
Easy Heat Systems Ltd	48.57	No
EJ Parker Technical Services (Scotland South) Ltd	48.08	No
Charge ELV Limited	30.03	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 1 - SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 4 - South East		
(East Lothian, Edinburgh, Midlothian, Scottish Borders)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	95.50	Yes
Jorro Ltd	83.49	Yes
Procast Energy Services Ltd	77.63	Yes
Everwarm Ltd	75.47	Yes
Ross-Shire Engineering Ltd	75.11	Yes
Liberty Charge Limited	72.30	Yes
Munro Wilson Limited	68.88	Yes
Saltire Facilities Management Ltd	67.63	Yes
SSUK Ltd	67.08	Yes
SWARCO UK LIMITED	66.49	Yes
Yunex Limited	65.80	Yes
Juuce Ltd t/a EO Charging	64.99	Yes
Connected Kerb Limited	64.73	Yes
Story Contracting Ltd	64.56	Yes
Chargemaster Ltd t/a bp pulse	62.07	Yes
ScottishPower Energy Retail Limited	61.19	Yes
Centregreat Limited	59.90	Yes
Enerveo Limited	58.36	Yes
W.G.M (ENGINEERING)LIMITED	57.96	Yes
Morrison Energy Services Ltd	57.51	Yes
BMM Energy Solutions Ltd	53.86	Yes

MP Group U K Ltd	52.29	Yes
Easy Heat Systems Ltd	48.57	No
EJ Parker Technical Services (Scotland South) Ltd	48.08	No
WB Electrical Services Ltd	38.61	No
Charge ELV Limited	30.03	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 1 - SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 5 - South West		
(East Dunbartonshire, East Renfrewshire, Glasgow, North Lanarkshire, Renfrewshire, West Dunbartonshire)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	95.50	Yes
Jorro Ltd	80.34	Yes
Procast Energy Services Ltd	74.09	Yes
Everwarm Ltd	72.73	Yes
Ross-Shire Engineering Ltd	71.05	Yes
Liberty Charge Limited	69.79	Yes
Saltire Facilities Management Ltd	64.97	Yes
SWARCO UK LIMITED	64.61	Yes
Story Contracting Ltd	64.34	Yes
Yunex Limited	64.07	Yes
SSUK Ltd	63.81	Yes
Connected Kerb Limited	62.98	Yes
Juuce Ltd t/a EO Charging	62.58	Yes
Chargemaster Ltd t/a bp pulse	60.70	Yes
ScottishPower Energy Retail Limited	59.48	Yes
Centregreat Limited	58.63	Yes
Morrison Energy Services Ltd	57.35	Yes
Munro Wilson Limited	56.74	Yes
Enerveo Limited	56.41	Yes
W.G.M (ENGINEERING)LIMITED	56.20	Yes
MP Group U K Ltd	51.46	Yes
BMM Energy Solutions Ltd	51.37	Yes
Easy Heat Systems Ltd	47.53	No
EJ Parker Technical Services (Scotland South) Ltd	46.66	No
WB Electrical Services Ltd	36.89	No
Charge ELV Limited	28.35	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 1 - SUPPLY, INSTALLATION AND MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 6 - South		
(Dumfries & Galloway, East Ayrshire, South Ayrshire, South Lanarkshire, Inverclyde, North Ayrshire)		
Tenderer	Score	Recommended for Award (Yes/No)
Valley Group Limited	95.50	Yes
Jorro Ltd	83.49	Yes
Procast Energy Services Ltd	77.63	Yes
Everwarm Ltd	75.23	Yes
Ross-Shire Engineering Ltd	75.11	Yes
Liberty Charge Limited	72.30	Yes
Saltire Facilities Management Ltd	67.43	Yes
SSUK Ltd	67.08	Yes
SWARCO UK LIMITED	66.49	Yes
Story Contracting Ltd	66.00	Yes
Yunex Limited	65.32	Yes
Juuce Ltd t/a EO Charging	64.99	Yes
Connected Kerb Limited	64.73	Yes
ScottishPower Energy Retail Limited	61.19	Yes
Chargemaster Ltd t/a bp pulse	60.97	Yes
Centregreat Limited	60.32	Yes
Munro Wilson Limited	59.22	Yes
Enerveo Limited	58.36	Yes
Morrison Energy Services Ltd	57.51	Yes
W.G.M (ENGINEERING)LIMITED	56.54	Yes
BMM Energy Solutions Ltd	53.86	Yes
MP Group U K Ltd	52.29	Yes
Easy Heat Systems Ltd	48.57	No
EJ Parker Technical Services (Scotland South) Ltd	48.08	No
WB Electrical Services Ltd	38.61	No
Charge ELV Limited	30.03	No
MER FLEET SERVICES LIMITED	Non Compliant	No

LOT 2 - SUPPLY ONLY OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	83.42	Yes
Edmundson Electrical Ltd	82.10	Yes
Rexel UK Limited	81.94	Yes
Zaptec U.K. Ltd	74.29	Yes
Jorro Ltd	73.13	Yes
BMM Energy Solutions Ltd	72.19	Yes
Story Contracting Ltd	71.71	Yes
Ross-Shire Engineering Ltd	70.32	Yes
Juuce Ltd t/a EO Charging	69.85	Yes
GPH Builders Merchants Ltd	68.65	Yes
Entrust Smart Home Microgrid Ltd	66.57	Yes
SWARCO UK LIMITED	62.20	Yes
City Electrical Factors Limited	59.38	Yes
Metric Group Ltd	58.13	Yes
SSUK Ltd	57.09	Yes
Gilbarco Veeder-Root Limited	56.51	Yes
Munro Wilson Limited	53.98	No
Charge ELV Limited	53.52	No
Yunex Limited	47.72	No
MER FLEET SERVICES LIMITED	47.60	No
Connected Kerb Limited	46.29	No
James M Anderson Ltd	42.00	No
John G. Mackintosh Limited	40.91	No
The Aluminium Lighting Company Ltd.	31.99	No
Cherry & White Ltd*	24.43	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 1 - Central		
(Clackmannanshire, Falkirk, Fife, Stirling, West Lothian)		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes
Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
BMM Energy Solutions Ltd	57.71	Yes
John G. Mackintosh Limited	57.30	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No
Centregreat Limited	48.96	No
E&S Utilities Limited t/a Powertek Utilities	45.09	No
Morrison Energy Services Ltd	42.69	No
Munro Wilson Limited	37.19	No
Phoenix Utilities Ltd	29.83	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 2 - Highlands and Islands		
(Argyll and Bute, Highland, Orkney, Shetland, Comhairle nan Eilean Siar, The Moray)		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes
Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No

Munro Wilson Limited	37.19	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 3 - North East		
(Aberdeen City, Aberdeenshire, Angus, Dundee, Perth & Kinross)		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes
Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
BMM Energy Solutions Ltd	57.71	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No
E&S Utilities Limited t/a Powertek Utilities	45.09	No
Munro Wilson Limited	37.19	No
Phoenix Utilities Ltd	29.83	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 4 - South East		
(East Lothian, Edinburgh, Midlothian, Scottish Borders)		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes

Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
BMM Energy Solutions Ltd	57.71	Yes
John G. Mackintosh Limited	57.30	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No
Centregreat Limited	48.96	No
E&S Utilities Limited t/a Powertek Utilities	45.09	No
Morrison Energy Services Ltd	42.69	No
Munro Wilson Limited	37.19	No
Phoenix Utilities Ltd	29.83	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
<p>REGION 5 - South West</p> <p>(East Dunbartonshire, East Renfrewshire, Glasgow, North Lanarkshire, Renfrewshire, West Dunbartonshire)</p>		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes
Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
BMM Energy Solutions Ltd	57.71	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No
Centregreat Limited	48.96	No
E&S Utilities Limited t/a Powertek Utilities	45.09	No
Morrison Energy Services Ltd	42.69	No
Munro Wilson Limited	37.19	No
Phoenix Utilities Ltd	29.83	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 3 - INSTALLATION OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 6 - South		
(Dumfries & Galloway, East Ayrshire, South Ayrshire, South Lanarkshire, Inverclyde, North Ayrshire)		
Tenderer	Score	Recommended for Award (Yes/No)
MP Group U K Ltd	80.60	Yes
Ross-Shire Engineering Ltd	72.40	Yes
Valley Group Limited	71.23	Yes
Boyd Brothers (Fauldhouse) Ltd	70.87	Yes
SWARCO UK LIMITED	67.48	Yes
BMM Energy Solutions Ltd	57.71	Yes
SSUK Ltd	57.10	Yes
Jorro Ltd	56.12	Yes
W.G.M (ENGINEERING)LIMITED	51.42	No
Centregreat Limited	48.96	No
E&S Utilities Limited t/a Powertek Utilities	45.09	No
Morrison Energy Services Ltd	42.69	No
Munro Wilson Limited	37.19	No
Phoenix Utilities Ltd	29.83	No
Charge ELV Limited	Non Compliant	No
Cherry & White Ltd*	Non Compliant	No
MER FLEET SERVICES LIMITED	Non Compliant	No

*Consortium bid composed of:

Cherry & White Ltd (02468825)

Worldnetwork Ltd (06977164)

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 1 - Central		
(Clackmannanshire, Falkirk, Fife, Stirling, West Lothian)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
Centregreat Limited	57.08	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No
BMM Energy Solutions Ltd	Non Compliant	No

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 2 - Highlands and Islands		
(Argyll and Bute, Highland, Orkney, Shetland, Comhairle nan Eilean Siar, The Moray)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 3 - North East		
(Aberdeen City, Aberdeenshire, Angus, Dundee, Perth & Kinross)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No
BMM Energy Solutions Ltd	Non Compliant	No

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 4 - South East		
(East Lothian, Edinburgh, Midlothian, Scottish Borders)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
Centregreat Limited	57.08	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No
BMM Energy Solutions Ltd	Non Compliant	No

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 5 - South West		
(East Dunbartonshire, East Renfrewshire, Glasgow, North Lanarkshire, Renfrewshire, West Dunbartonshire)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
Centregreat Limited	57.08	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No
BMM Energy Solutions Ltd	Non Compliant	No

LOT 4 - MAINTENANCE OF ELECTRIC VEHICLE CHARGING EQUIPMENT AND ASSOCIATED ITEMS		
REGION 6 - South		
(Dumfries & Galloway, East Ayrshire, South Ayrshire, South Lanarkshire, Inverclyde, North Ayrshire)		
Tenderer	Score	Recommended for Award (Yes/No)
W.G.M (ENGINEERING)LIMITED	72.97	Yes
Ross-Shire Engineering Ltd	70.11	Yes
Jorro Ltd	65.28	Yes
Gilbarco Veeder-Root Limited	63.32	Yes
Yunex Limited	61.24	Yes
Centregreat Limited	57.08	Yes
SSUK Ltd	55.56	Yes
MER FLEET SERVICES LIMITED	48.63	No
MP Group U K Ltd	47.83	No
SWARCO UK LIMITED	45.79	No
Munro Wilson Limited	41.36	No
Charge ELV Limited	12.24	No
BMM Energy Solutions Ltd	Non Compliant	No

Appendix 4 - List of Recommended Suppliers with Real Living Wage Status

Tenderer	Accredited	Currently progressing through the Real Living Wage accreditation process	Pay Real Living Wage to all employees, and commit to gaining accreditation over the initial 2 years of the framework	Pay Real Living Wage to all employees, but not accredited	Neither accredited nor paying the Real Living Wage, but do commit to pay the Real Living Wage to all employees over the initial 2 years of the framework	Neither accredited nor paying the Real Living Wage
Bmm Energy Solutions Ltd	YES					
Boyd Brothers (Fauldhouse) Ltd				YES		
Centregreat Limited	YES					
Chargemaster Ltd t/a bp pulse				YES		
City Electrical Factors Limited						YES
Connected Kerb Limited			YES			
Easy Heat Systems Ltd				YES		
Edmundson Electrical Ltd						YES
Enerveo Limited		YES				
Entrust Smart Home Microgrid Ltd				YES		
Everwarm Ltd	YES					
Gilbarco Veeder-Root Limited				YES		
GPH Builders Merchants Ltd				YES		
John G. Mackintosh Limited	YES					
Jorro Ltd		YES				
Juuce Ltd t/a EO Charging				YES		
Liberty Charge Limited	YES					
Metric Group Ltd						YES
Morrison Energy Services Ltd				YES		
MP Group UK Ltd	YES					
Munro Wilson Limited				YES		
Procast Energy Services Ltd	YES					
Rexel UK Limited						YES
Ross-Shire Engineering Ltd				YES		
Saltire Facilities Management Ltd	YES					
ScottishPower Energy Retail Limited				YES		
SSUK Ltd						YES
Story Contracting Ltd				YES		
SWARCO UK LIMITED			YES			
Valley Group Limited	YES					
W.G.M (ENGINEERING)LIMITED	YES					
Yunex Limited	YES					
Zaptec U.K. Ltd				YES		

Appendix 5 - Segmentation classifications

2119 Electric Vehicle Charging Infrastructure is classified as class B.

There are five segmentation classifications and these classifications are rated from Class A to Class E. Each classification has contract and supplier management activities associated with it based on pre-determined weighted criteria.

Class A

Due to the unique and bespoke nature of the frameworks that fall within this class, a contract management plan to be developed and agreed with CSG.

Class B

Quarterly supplier contact, six monthly surveys, annual UIG, frequent support to councils, suppliers and external stakeholders requiring high level of procurement expertise, extensive contract monitoring.

Class C

Six monthly supplier contact, six monthly to annual surveys, annual UIG, regular support to councils, suppliers and external stakeholders requiring procurement expertise, high contract monitoring.

Class D

Annual supplier contact, annual surveys, optional annual UIG, ad-hoc support to councils, suppliers and external stakeholders potentially requiring procurement expertise, regular contract monitoring.

Class E

Annual supplier contact (if required), optional annual surveys, no requirement for annual UIG, straightforward ad-hoc support to councils, suppliers and potentially requiring procurement assistance, basic contract monitoring.

End of Report

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

**Tender: Supply & Delivery of Personal Protective Equipment (PPE) including
Pandemic Recovery Items & Workwear**

Schedule: 0621

**Period: 1 June 2022 until 31 May 2025 with 1 x 12 month extension option
until 31 May 2026**

1. Introduction and Background

The current framework for PPE will expire on 31 May 2022 after an additional extension period. This was put in place to provide supplier relief and to ensure continuity of service to member councils during the first impacts of the coronavirus pandemic in line with applicable law and guidance and has been the subject of previous reporting to members. This proposed renewal framework is intended to operate from 1 June 2022 until 31 May 2025 with 1 x 12 month extension option until 31 May 2026.

This framework will provide councils with a mechanism to procure a wide range of personal protective equipment (PPE), workwear and pandemic recovery items.

This report summarises the outcome of the procurement process for this national framework arrangement, and presents recommendations for award.

2. Scope, Participation and Spend

As part of the strategy development and through consultation with the User Intelligence Groups (UIG), it was decided that given the impact of the coronavirus pandemic that the lotting structure would be altered compared to the previous framework. (Table 1)

Table 1: Lotting Structure

Lot No.	Lot Description
1	Ear, Eye and Head Protection
2	Safety Masks & Respirators
3	Gloves
4	Hi Viz Wear and Protective Workwear
5	Traditional Workwear
6	Footwear
7	Catering and Food Industry
8	Pandemic Recovery Items
9	One Stop Shop

Tenderers were able to bid for one, any or all lots. Each lot and each offer was evaluated on its own merit as discrete and independent tenders. Recommendations for award are made within each lot. Further information about the evaluation process applied to each lot is contained in section 3 of the report, below.

The framework was advertised to permit access by all 32 councils as well as Tayside contracts and all Associate Members. Also named within the contract notice were the NHS, Scottish Prison Service, Police Scotland, Scottish Ambulance Service, Advanced Procurement for Universities and Colleges (APUC Ltd). All 32 councils and Tayside Contracts have confirmed their intention to participate in this framework.

Historical spend data suggests a forecast framework spend of circa £10 million per annum, and this framework was advertised with a value of up to £15 million per annum. This is to account for increased participation from councils as well as any other permitted bodies. It will also take into consideration:

- The inclusion of workwear into the framework
- A pandemic recovery items lot

3. Procurement Process

(a) Preliminary Market Consultation

A Prior Information Notice (PIN) was published on 4th March 2021 relative to a preliminary market consultation exercise in accordance with Regulation 41 of the Public Contracts (Scotland) Regulations 2015. This resulted in expressions of

interest from 366 companies which led to 35 PIN meetings being held over four days.

The meetings covered a variety of subjects which included:

- an insight into the current demographic of the PPE marketplace due to the impact of COVID;
- innovation and product development;
- manufacturing capability;
- supported businesses;
- the development/engagement of SMEs;
- new PPE regulations;
- timescales;
- community benefits;
- workforce matters, and
- matters related to the UK's withdrawal from the EU.

A prominent outcome from these meetings was the suppliers' clear enthusiasm to work with and supply the councils via this framework.

Additionally, suppliers were given the option of completing an online survey. The survey was included in the PIN and the link was also sent out to interested suppliers, 133 responses were received. PIN survey feedback centered around the current challenges in the marketplace and potential approaches to ensure that the framework met the needs of the users and also the marketplace both currently and moving forward.

(b) Tender

Scotland Excel has taken consideration of the current situation relative to the Coronavirus pandemic when planning and proceeding with this tender. Balancing the situation with the need to provide a route to market for Councils to obtain a range of PPE, pandemic recovery items and workwear, Scotland Excel has determined to proceed with the tender exercise and award recommendations contained in this report to establish the framework for the Supply & Delivery of Personal Protective Equipment (PPE) including Pandemic Recovery Items & Workwear. Scotland Excel will continue to carefully monitor the situation throughout the mobilisation and award of the framework.

At the outset of the tender process, the User Intelligence Group (UIG), consisting of procurement and technical representatives from participating councils, endorsed the procurement strategy. A working group of technical representatives from the councils reviewed the specifications and the technical criteria to be adopted during the tender process.

The procurement exercise followed an open tender procedure to encourage maximum competition and participation. All bidders were evaluated against the advertised selection criteria using the Single Procurement Document (SPD), and the stated award criteria of:

- Technical 40%

- Commercial 60%

Within the technical section, bidders were required to evidence their knowledge and experience by responding to a series of technical areas which are detailed in table 2.

Table 2: Technical Scoring

Questions - Technical Section All LOTS	Points Available
Service, Delivery & Contract Management	8
Sustainability	12
Transport and Delivery Logistics	6
Environmental Practices	6
Supply Chain Innovation and Added Value	3
Fair Work First	3
Community Benefits	2
Overall Score	40

The commercial section of the tender was worth 60 points.

Lots 1 through 7 were evaluated on a basket of goods approach with each bidder required to meet a minimum threshold of items in order to return a compliant tender bid.

Lot 8 has a particular focus on selected pandemic recovery items and was evaluated on a line by line item basis. This enabled us to maximise the participation of suppliers who could offer individual or more specialist items as well as maximising the number of suppliers/manufacturers that would be able to submit offers. This in turn would provide a compliant route to an increased supply base for members, should there be a further pandemic/crisis during the period of this framework.

Lot 9 (One Stop Shop) is intended to be a “one-stop-shop” for councils that wish to consolidate their spend.

Only those Tenderers who meet the following requirements are eligible to be awarded a place on Lot 9 (One Stop Shop):

Tenderers have submitted a successful compliant bid for all lots listed below:

- Lot 1 – Ear, Eye and Head Protection;
- Lot 2 – Safety Masks & Respirators;
- Lot 3 – Gloves;
- Lot 4 –Hi Viz Wear and Protective Workwear ;

- Lot 5 – Traditional Workwear;
- Lot 6 – Footwear; and
- Lot 7 – Catering and Food Industry

4. Report on Offers Received

Offers were received from 46 tenderers, a summary of which is provided in Appendix 1 (List of Tenderers).

All respondents passed the first stage qualification/selection assessment. However, one bidder was non-compliant having failed to meet minimum percentage basket of goods relative to the lot for which they wish to tender. The bidder has been advised accordingly. A further 6 bidders had elements of non-compliance for particular lots and, similarly, have been advised of this. Where appropriate, they may have been recommended for appointment on other lots for which they submitted compliant offers.

Based on the criteria and scoring methodology set out in the tender documents, a full evaluation of the offers received was carried out. Appendix 2 outlines the scoring achieved by each bidder or (in the case of lot 9) the placing achieved.

5. Recommendations

Based on the evaluation undertaken, and in line with the advertised criteria and weightings summarised above, it is recommended that a multi-supplier framework arrangement is awarded to 44 suppliers across the nine lots as outlined in Appendix 2.

The recommended suppliers provide the choice, scope and range of products required by councils as well as representing best value. These suppliers also represent a mix of micro, small, medium and large organisations, with 35 of the recommended suppliers classified as SMEs, one of which is also a supported business.

The Executive Sub Committee is accordingly requested to approve the recommendation to award this framework to the suppliers detailed within Appendix 2 (Scoring and Recommendations)

6. Benefits

Savings

Scotland Excel has not conducted a benchmarking exercise on this tender due to the entirely different lotting structure for this new approach compared to the previous frameworks and also taking into consideration that buying patterns and costings have been so fluid over the past 2 years, the likelihood of any such evaluation would be flawed. The massive increase on pricing during the height of the COVID pandemic compared to now would result in unrealistic figures being

returned. Scotland Excel could potentially carry out a best price v average price for each lot but again this would not specifically address any potential saving or on cost.

Price Stability

Price Stability was not scored for this tender due to ongoing market uncertainty at the time of tendering. However, a 12 month price stability clause was included.

Subsequent pricing will then be held for a 12 month period with any price variance request within these windows being considered in accordance with the defined Scotland Excel process. All requests will be evaluated against market indices, pricing, fuel and packaging costs.

Rebate

A rebate of 0.3% payable to Scotland Excel and 0.7% payable to councils will be applied to framework spend above £300,000 (excluding the initial £300,000) and will be calculated based upon all framework spend with the supplier reported through management information returns.

Sustainable Procurement Benefits

Within the technical section of the tender, Scotland Excel included a number of sustainability related method statements, including :

- Reduction of single use plastics
- Take-Back Policy (Re-use)
- Products Sourced (Ethically, Sustainability and Environmental)
- Environmental Practices

Responses received highlight various approaches to reducing single use plastics in packaging, carbon offsetting and tracking, switching to electric vehicles as and when possible and the taking back of worn and used PPE to be recycled and used in the manufacture of new items.

Scotland Excel will continue to monitor any changes in legislation that may affect the framework during its lifetime and will work with successful suppliers and councils to implement these.

Community Benefits

Suppliers were asked to commit to the delivery of community benefit initiatives, against pre-agreed spend thresholds outlined within the community benefits method statement. These aim to be reflective of the National Indicators outlined within the Scottish Government's National Performance framework, and their underlying vision and goals. Councils will accrue 'community benefit points' based on their level of spend with a supplier. These 'points' correlate to a

negotiable benefit that the council can elect to receive at any given point throughout the lifetime of the framework.

Of the 44 recommended suppliers, 40 have committed to delivering these benefits.

Within the community benefit tender documentation, suppliers were given a list of indicative community benefits that could be agreed with councils. Examples of these are:

- Fundraising event for external charities / initiatives within the council
- Work placements to school students from councils
- Support local food banks and community pantry initiatives
- Support holiday hunger programmes
- Sponsorship of sports team or community event within the council to the value of £500
- Recruit a modern (or other approved) apprentice from within the council
- Recruit one person from with the council area

Scotland Excel will monitor delivery of these commitments during the lifetime of the framework and this will also be reported through ongoing contract management returns. Results reported on community benefits will be disseminated to councils on a 6 monthly period basis.

Fair Work First including Real Living Wage

Scotland Excel recognises the importance of fair work practices in the delivery of effective public services. Within the technical section of the tender, one of the method statements assessed bidders on areas such as how they will commit to fair work practices. These include payment of the Real Living Wage, a fair pay policy, improving wider diversity of staff and avoiding exploitative employment practices, such as no inappropriate use of zero hours contracts.

Within the technical section of the tender, bidders were assessed on their approach to fair work practices and payment of the Real Living Wage to their workforce. Of the recommended bidders 40 are paying the Real Living Wage, with 14 accredited, and a further 10 being either in the processes of achieving accreditation or working towards accreditation as detailed in Appendix 4 - List of Recommended Service Providers with Living Wage Status).

Scotland Excel will continue to monitor fair work practices, including further uptake by suppliers committing to paying staff the real Living Wage, through contract and supplier management activity.

7. Contract Mobilisation and Management

As part of the mobilisation process, all suppliers will be invited to a contract mobilisation meeting to outline the operation of the framework. This will include

roles and responsibilities, management information requirements and community benefits reporting. Suppliers and participating councils will be issued with a mobilisation pack containing all required details which will enable them to utilise the framework.

In accordance with Scotland Excel's established contract and supplier management programme, this framework had originally been classified as a category B framework. However, given the complexity around this area currently along with the increased number of awarded suppliers it has been decided that it should be re-classified to a category A framework. As such, a contract management plan is to be developed and agreed with CSG, whilst monitoring management information and community benefits associated with this framework. A summary of contract and supplier management classifications can be found in Appendix 4.

Supplier performance will be monitored by the contract supplier management process where surveys will be issued to councils for feedback on elements of the framework such as quality and service. This feedback will form the basis of contract management meetings with suppliers, who will be able to review the feedback and if required initiate an improvement programme.

Meetings and engagement undertaken with suppliers will adhere to all applicable health and safety guidelines.

8. Summary

This is the fourth generation framework for the Supply & Delivery of Personal Protective Equipment (PPE) including Pandemic Recovery Items & Workwear and aims to maximise collaboration, consolidate demand and deliver best value.

The Executive Sub Committee is requested to approve the recommendation detailed in Section 5 (Recommendations) of the report, to award this framework to the suppliers detailed within Appendix 2 (Scoring and Recommendations).

Appendix 1 - List of Tenderers with SME Status

Name of Tenderers	SME Status	Location	Lots Tendered	Lots Awarded
Arco Limited	Large	Hull	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Aspire Industrial Services Limited	Small	Glasgow	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
B.C.B. INTERNATIONAL LIMITED	Medium	Cardiff	8	8
BACA Workwear & Safety Ltd	Medium	Northampton	5 & 6	5 & 6
BGS UK 2019 Ltd	Small	Northampton	8	8
BLUETREE DESIGN AND PRINT LIMITED	Large	Rotherham	2 & 8	8
Bunzl UK Limited T/A Bunzl Greenham	Large	Glasgow	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Cleaning & Wiping Supplies Ltd.	Small	East Kilbride	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Corston Sinclair Limited	Small	East Kilbride	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
CREATIVE ACTIVITY GROUP LIMITED	Small	Londonderry	8	8
D.R. Caswell Limited	Medium	Middlesbrough	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Don & Low Limited	Large	Forfar	2	
Enviroclean Global Ltd	Small	Stirling	2, 3 & 8	2, 3 & 8
Eumar Technology Limited	Small	Hereford	8	8
Future Garments Limited T/A Eurox	Medium	Smethwick	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	Small	Fife	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Global Health & Safety Ltd	Small	London	8	8
GMC Corsehill Ltd.	Small	Irvine	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Healthy Bean Ltd	Micro	London	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Ilasco Limited	Medium	Glenrothes	4 & 5	4 & 5
James Boylan Safety (NI) Ltd T/A JBS Group	Medium	Derry	1, 2, 3, 4, 5 & 6	1, 2, 3, 4, 5 & 6
JW Brown Industrial Services, A Partnership	Micro	Irvine	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Lion Safety Limited	Small	Stirling	1, 2, 3, 4, 5, 6, 7, & 8	2, 3, 4, 5, 6, 7, 8
Lyreco UK Limited	Large	Telford	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Mi Hub Limited Trading as Alexandra	Large	Bristol	5 & 7	5 & 7
Morna Laird Ltd T/A McKinlay Workwear Supplies	Micro	Hamilton	1, 2, 3, 4, 5, 6, 7, 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Novum MedTech Limited	Micro	Birmingham	2 & 3	

Nuline Limited	Small	East Ayrshire	8	8
P.F. Cusack (Tools Supplies) Limited	Medium	Glasgow	1, 2, 3, 4, 5 & 6	1, 2, 3, 4, 5 & 6
PFG BRAND ATTRACTION EUROPE LIMITED	Small	Dublin	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 7 & 8
PLS Medical Limited	Micro	Peebles	3, 6 & 8	3, 6 & 8
Polypak Plastene Limited	Micro	Haddington	3	3
Protective Wear Supplies Ltd	Small	Plymouth	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Reliance Medical Ltd	Medium	Stoke-On-Trent	3 & 8	3 & 8
Rexel UK Limited	Large	Birmingham	1, 2, 3 & 6	1, 2, 3 & 6
RS Components Limited	Large	Corby	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Solar Medical & Chemical Limited	Micro	Avondale Way	2 & 8	8
Stax Trade Centres Limited	Small	Manchester	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Stiven Limited	Micro	DUNDEE	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Streamline Corporate Limited	Small	Edinburgh	1, 2, 3, 4, 5, 6 & 8	1, 2, 3, 4, 5, 6 & 8
Sunbelt Rentals Limited	Large	Warrington	1, 2, 3, 4, 5, 6 & 8	1, 2, 3, 4, 5, 6 & 8
T.R. Bonnyman, Son & Company Limited	Small	Beith	1, 2 & 8	8
The Guthrie Group Limited	Small	Livingston	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Thomas Graham & Sons Limited	Medium	EGREMONT	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Unico Limited	Medium	Falkirk	1, 2, 3, 4, 5, 6, 7, & 8	1, 2, 3, 4, 5, 6, 7, 8 & 9
Valmy SAS Ltd	Medium	Iuton	2 & 8	8

Appendix 2 - Scoring and Recommendations

Lot 1 - Ear, Eye & Head Protection				Lot 2 - Safety Masks & Respirators		
Supplier	Score	Awarded To Lot		Supplier	Score	Awarded To Lot
GMC Corsehill Ltd.	96.25	Yes		Protective Wear Supplies Ltd	91.75	Yes
Protective Wear Supplies Ltd	91.66	Yes		Arco Limited	89.21	Yes
The Guthrie Group Limited	88.34	Yes		The Guthrie Group Limited	86.37	Yes
D.R. Caswell Limited	86.34	Yes		Unico Limited	84.97	Yes
Future Garments Limited	84.81	Yes		Lion Safety Limited	81.85	Yes
Healthy Bean Ltd	78.84	Yes		Future Garments Limited	81.20	Yes
Arco Limited	77.53	Yes		Lyreco UK Limited	75.70	Yes
Aspire Industrial Services Limited	75.75	Yes		Thomas Graham & Sons Limited	75.49	Yes
Bunzl UK Limited	75.72	Yes		Morna Laird Ltd	70.79	Yes
Unico Limited	71.49	Yes		GMC Corsehill Ltd.	68.27	Yes
Morna Laird Ltd	69.72	Yes		D.R. Caswell Limited	67.47	Yes
Lyreco UK Limited	68.59	Yes		Stax Trade Centres Limited	67.41	Yes
Thomas Graham & Sons Limited	66.68	Yes		Bunzl UK Limited	66.85	Yes
JW Brown Industrial Services, A Partnership	62.41	Yes		Healthy Bean Ltd	66.48	Yes
RS Components Limited	61.77	Yes		Streamline Corporate Limited	64.90	Yes
Rexel UK Limited	61.06	Yes		Aspire Industrial Services Limited	63.63	Yes
Streamline Corporate Limited	60.93	Yes		JW Brown Industrial Services, A Partnership	62.47	Yes
PFG BRAND ATTRACTION EUROPE LIMITED	59.51	Yes		James Boylan Safety (NI) Ltd T/A JBS Group	61.20	Yes
Stax Trade Centres Limited	58.19	Yes		Sunbelt Rentals Limited	57.80	Yes
James Boylan Safety (NI) Ltd T/A JBS Group	57.60	Yes		Rexel UK Limited	57.52	Yes
Sunbelt Rentals Limited	55.90	Yes		GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	57.12	Yes
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	53.76	Yes		PFG BRAND ATTRACTION EUROPE LIMITED	55.04	Yes
Cleaning & Wiping Supplies Ltd.	53.69	Yes		RS Components Limited	54.68	Yes
P.F. Cusack (Tools Supplies) Limited	50.15	Yes		Enviroclean Global Ltd	54.08	Yes
Corston Sinclair Limited	46.02	Yes		Stiven Limited	53.36	Yes
Stiven Limited	45.31	Yes		Corston Sinclair Limited	50.01	Yes
Lion Safety	0.00	Non-compliant		P.F. Cusack (Tools Supplies) Limited	47.19	Yes
T.R. Bonnyman, Son & Company Limited	0.00	Non-compliant		Cleaning & Wiping Supplies Ltd.	46.55	Yes
				Novum MedTech Limited	37.66	No
				Solar Medical & Chemical Ltd.	0.00	Non-compliant
				Bluetree Design And Print Limited	0.00	Non-compliant
				T.R. Bonnyman, Son & Company Limited	0.00	Non-compliant
				Don and Low	0.00	Non-compliant
				Valmy Sas Ltd	0.00	Non-compliant

Lot 3 - Gloves				Lot 4 - Hi Viz wear & Protective Workwear		
Supplier	Score	Awarded To Lot		Supplier	Score	Awarded To Lot
Bunzl UK Limited	91.50	Yes		Arco Limited	97.46	Yes
GMC Corsehill Ltd.	90.60	Yes		Protective Wear Supplies Ltd	91.75	Yes
Lyreco Uk Limited	87.20	Yes		Lion Safety Limited	89.97	Yes
Arco Limited	85.83	Yes		Future Garments Limited	88.87	Yes
Unico Limited	84.24	Yes		Unico Limited	85.16	Yes
The Guthrie Group Limited	83.88	Yes		The Guthrie Group Limited	83.37	Yes
Healthy Bean Ltd	83.17	Yes		GMC Corsehill Ltd.	82.72	Yes
Protective Wear Supplies Ltd	82.92	Yes		Thomas Graham & Sons Limited	81.17	Yes
Streamline Corporate Limited	79.94	Yes		Bunzl UK Limited	80.73	Yes
Lion Safety Limited	77.35	Yes		James Boylan Safety (NI) Ltd T/A JBS Group	79.04	Yes
Thomas Graham & Sons Limited	76.87	Yes		Lyreco UK Limited	79.03	Yes
Morna Laird Ltd	76.45	Yes		Healthy Bean Ltd	78.03	Yes
Enviroclean Global Ltd	75.03	Yes		D.R. Caswell Limited	77.26	Yes
Aspire Industrial Services Limited	74.11	Yes		RS Components Limited	76.94	Yes
Future Garments Limited	72.93	Yes		Morna Laird Ltd	76.70	Yes
D.R. Caswell Limited	71.79	Yes		Streamline Corporate Limited	75.64	Yes
Rexel UK Limited	69.32	Yes		Stax Trade Centres Limited	73.59	Yes
James Boylan Safety (NI) Ltd T/A JBS Group	69.23	Yes		Aspire Industrial Services Limited	73.03	Yes
JW Brown Industrial Services, A Partnership	66.78	Yes		Cleaning & Wiping Supplies Ltd.	70.89	Yes
Cleaning & Wiping Supplies Ltd.	63.18	Yes		JW Brown Industrial Services, A Partnership	69.52	Yes
Polypak Plastene Limited	61.35	Yes		P.F. Cusack (Tools Supplies) Limited	62.21	Yes
Corston Sinclair Limited	57.87	Yes		GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	54.75	Yes
Stax Trade Centres Limited	57.83	Yes		Sunbelt Rentals Limited	54.17	Yes
Sunbelt Rentals Limited	56.86	Yes		Stiven Limited	52.30	Yes
PLS Medical Limited	55.94	Yes		PFG BRAND ATTRACTION EUROPE LIMITED	52.10	Yes
RS Components Limited	54.72	Yes		Corston Sinclair Limited	51.91	Yes
PFG BRAND ATTRACTION EUROPE LIMITED	54.40	Yes		Ilasco Limited	47.71	Yes
Reliance Medical Ltd	54.19	Yes				
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	53.77	Yes				
P.F. Cusack (Tools Supplies) Limited	50.73	Yes				
Stiven Limited	49.74	Yes				
Novum MedTech Limited	41.04	No				

Lot 5 - Traditional Workwear			Lot 6 - Footwear		
Supplier	Score	Awarded To Lot	Supplier	Score	Awarded To Lot
Lion Safety Limited	95.34	Yes	Protective Wear Supplies Ltd	91.75	Yes
Protective Wear Supplies Ltd	91.75	Yes	Lion Safety Limited	87.76	Yes
Arco Limited	90.86	Yes	The Guthrie Group Limited	87.22	Yes
GMC Corsehill Ltd.	85.08	Yes	Lyreco UK Limited	87.16	Yes
The Guthrie Group Limited	84.78	Yes	Bunzl UK Limited	86.49	Yes
Lyreco UK Limited	81.47	Yes	Arco Limited	83.71	Yes
Future Garments Limited	81.05	Yes	Healthy Bean Ltd	80.68	Yes
D.R. Caswell Limited	80.82	Yes	Thomas Graham & Sons Limited	79.97	Yes
Unico Limited	80.34	Yes	Unico Limited	79.84	Yes
Streamline Corporate Limited	79.91	Yes	D.R. Caswell Limited	79.68	Yes
Bunzl UK Limited	78.42	Yes	Future Garments Limited	79.44	Yes
RS Components Limited	75.86	Yes	GMC Corsehill Ltd.	78.47	Yes
Thomas Graham & Sons Limited	75.62	Yes	Aspire Industrial Services Limited	74.42	Yes
James Boylan Safety (NI) Ltd T/A JBS Group	74.25	Yes	Streamline Corporate Limited	72.71	Yes
Aspire Industrial Services Limited	73.16	Yes	Morna Laird Ltd	71.45	Yes
Healthy Bean Ltd	71.01	Yes	James Boylan Safety (NI) Ltd T/A JBS Group	71.28	Yes
JW Brown Industrial Services, A Partnership	70.62	Yes	RS Components Limited	70.41	Yes
Stax Trade Centres Limited	69.51	Yes	JW Brown Industrial Services, A Partnership	69.87	Yes
Morna Laird Ltd	64.54	Yes	GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	67.33	Yes
BACA Workwear & Safety Ltd	63.62	Yes	Rexel UK Limited	66.98	Yes
Cleaning & Wiping Supplies Ltd.	63.47	Yes	PLS Medical Limited	66.15	Yes
PFG BRAND ATTRACTION EUROPE LIMITED	63.02	Yes	BACA Workwear & Safety Ltd	65.61	Yes
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	60.09	Yes	Stiven Limited	63.17	Yes
P.F. Cusack (Tools Supplies) Limited	58.93	Yes	Cleaning & Wiping Supplies Ltd.	61.06	Yes
Mi Hub Limited Trading as Alexandra	58.01	Yes	Sunbelt Rentals Limited	60.49	Yes
Stiven Limited	55.99	Yes	P.F. Cusack (Tools Supplies) Limited	55.88	Yes
Sunbelt Rentals Limited	55.62	Yes	Stax Trade Centres Limited	50.56	Yes
Corston Sinclair Limited	50.14	Yes	Corston Sinclair Limited	50.53	Yes
Ilasco Limited	47.41	Yes	PFG BRAND ATTRACTION EUROPE LIMITED	0.00	Non-compliant

Lot 7 - Catering and Food Industry				Lot 8 - Pandemic Recovery Items	
Supplier	Score	Awarded To Lot		Supplier	Awarded to Lot
Arco Limited	97.75	Yes		Arco Limited	Yes
GMC Corsehill Ltd.	92.31	Yes		Aspire Industrial Services Limited	Yes
Lion Safety Limited	89.29	Yes		B.C.B. INTERNATIONAL LIMITED	Yes
The Guthrie Group Limited	88.92	Yes		BGS UK 2019 Ltd	Yes
Protective Wear Supplies Ltd	83.07	Yes		BLUETREE DESIGN AND PRINT LIMITED	Yes
Future Garments Limited	82.62	Yes		Bunzl UK Limited	Yes
RS Components Limited	80.09	Yes		Cleaning & Wiping Supplies Ltd.	Yes
Bunzl UK Limited	79.94	Yes		Corston Sinclair Limited	Yes
Lyreco UK Limited	78.18	Yes		CREATIVE ACTIVITY GROUP LIMITED	Yes
Morna Laird Ltd	73.78	Yes		D.R. Caswell Limited	Yes
D.R. Caswell Limited	73.45	Yes		GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	Yes
Unico Limited	73.40	Yes		Enviroclean Global Ltd	Yes
Aspire Industrial Services Limited	73.06	Yes		Eumar Technology Limited	Yes
Thomas Graham & Sons Limited	71.32	Yes		Future Garments Limited	Yes
JW Brown Industrial Services, A Partnership	70.12	Yes		Global Health And Safety Ltd	Yes
Healthy Bean Ltd	69.49	Yes		GMC Corsehill Ltd.	Yes
PFG BRAND ATTRACTION EUROPE LIMITED	64.01	Yes		Healthy Bean Ltd	Yes
Mi Hub Limited Trading as Alexandra	61.53	Yes		JW Brown Industrial Services, A Partnership	Yes
Stax Trade Centres Limited	60.67	Yes		Lion Safety Limited	Yes
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	58.56	Yes		Lyreco UK Limited	Yes
Cleaning & Wiping Supplies Ltd.	54.69	Yes		Morna Laird Ltd	Yes
Stiven Limited	54.41	Yes		Nuline Medical	Yes
Corston Sinclair Limited	47.67	Yes		PFG BRAND ATTRACTION EUROPE LIMITED	Yes
				PLS Medical Limited	Yes
				Protective Wear Supplies Ltd	Yes
				Reliance Medical Ltd	Yes
				RS Components Limited	Yes
				Solar Medical & Chemical Limited	Yes
				Stax Trade Centres Limited	Yes
				Stiven Limited	Yes
				Streamline Corporate Limited	Yes
				Sunbelt Rentals Limited	Yes
				T.R. Bonnyman, Son & Company Limited	Yes
				The Guthrie Group Limited	Yes
				Thomas Graham & Sons Limited	Yes
				Unico Limited	Yes
				Valmy Sas Ltd	Yes

Lot 9 - One Stop Shop	
Supplier	Awarded To Lot
Arco Limited	Yes
Aspire Industrial Services Limited	Yes
Bunzl UK Limited	Yes
Cleaning & Wiping Supplies Ltd.	Yes
Corston Sinclair Limited	Yes
D.R. Caswell Limited	Yes
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	Yes
Future Garments Limited	Yes
GMC Corsehill Ltd.	Yes
Healthy Bean Ltd	Yes
JW Brown Industrial Services, A Partnership	Yes
Lyreco UK Limited	Yes
Morna Laird Ltd	Yes
Protective Wear Supplies Ltd	Yes
RS Components Limited	Yes
Stax Trade Centres Limited	Yes
Stiven Limited	Yes
The Guthrie Group Limited	Yes
Thomas Graham & Sons Limited	Yes
Unico Limited	Yes

Detailed Breakdown of Lot 8

Lot 8 - Pandemic Recovery Items																				
Supplier	Lot 8 - 1	Lot 8 - 2	Lot 8 - 3	Lot 8 - 4	Lot 8 - 5	Lot 8 - 6	Lot 8 - 7	Lot 8 - 8	Lot 8 - 9	Lot 8 - 10	Lot 8 - 11	Lot 8 - 12	Lot 8 - 13	Lot 8 - 14	Lot 8 - 15	Lot 8 - 16	Lot 8 - 17	Lot 8 - 18	Lot 8 - 19	Lot 8 - 20
Arco Limited	71.37	50.44	66.23	66.16	75.06	97.75	54.47	56.08	50.13	45.57	45.39	45.84	53.56	58.67	46.92	50.72	59.02	50	77.46	54.62
Aspire Industrial Services Limited	88.25	51.63	85.11	93.11	46	73.87	93.85	62.65	96.25	84.55	51.98	51.25	73.94	96.25		59.94	64.9	59.69	96.25	62.68
B.C.B. INTERNATIONAL LIMITED	31.71		37.25	28.45			26.85	16.97	26.75	34.88	25.73	20.87		27.95	17.11	60.92				
BGS UK 2019 Ltd	38.96	38.63	24.61	23.73	13.4	33	24.85		20.53	24.63	61.93	19.84	72.25	24.43		15.83			25.42	
BLUETREE DESIGN AND PRINT LIMITED														65.94	42.5					
Bunzl UK Limited	73.72	44.97	70.54	70.44	59.06	67.91	73.24	57.9	55.5	79.8	78.7	91.5	43.87	55.83	39.44	36.67	91.5	91.5	65.92	47.72
Cleaning & Wiping Supplies Ltd.	40.54	35.13	54.33	35.48	38.7	61.07	44.25	32.84	36.36	38.59	35.74		50.68	52.5		50.24	61.36	45.7	73.08	37.6
Corston Sinclair Limited	30.25	35.19	49.06	46.16	28.66	46.89	57.53	33.75	32.25		29.35	26.93	37.01	36.41	24	47.52	49.48	49.48	57.75	27.68
CREATIVE ACTIVITY GROUP LIMITED			53.4	46.93		57.62	66.98	22.02	38.5	48.69	37.38	28.84	46.57	48.2	27.59	72.98	40.06	34.66	28.64	
D.R. Caswell Limited	76.30	46.23	49.41	83.13	53.82	64.44	51.25	60.63	44.48	47.57	43.83	46.16	53.71	51.75	42.3	38	52.67	52.67	87.51	45.55
Enviroclean Global Ltd	52.88	61.03	50.49	54.99	53.61	78.82	51.45	92.25	42.01	42.53	92.25	43.79	88.31	63.19	44.06	53.7	84.23	66.63	61.18	
Eumar Technology Limited														46.5						
Future Garments Limited	78.55	40.84	72.79	68.97	62.8	71.58	43.53	52.78	60.17	69.55	52.57	49.63	57.63	58.48	39.93	44.32	90.06	61.12	90.54	45.21
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED	69.05	42.83	56.22	61.09		35.21	36.66	52.91	38.98	40.98	38.13		41.57			32.4	54.93	54.93	74.39	53.41
Global Health And Safety Ltd														42.47						
GMC Corsehill Ltd.	64.31	74.97	69.45	74.37	86.36	76.66	73.65	66.25	63.17	62.41	54.06	51.33	64.11	72.25	39.78	85.78	92.79	68.81	84.18	62.68
Healthy Bean Ltd	74.83	91.30	80.22	80.1	46.45	68.38	66.28	59.71	56.5	58.33	49.54	45.79	58.23	81	42.44	86.87	69.87	63.1	82.64	70.36
JW Brown Industrial Services, A Partnership	57.15	45.2	58.99	64.19		62.32	39.14	54.25						55.53	40.09	34.72	36.03	36.03	54.37	51.68
Lion Safety Limited	70.61	46.31	78.43	74.5	43.34	81.49	44.58	66.78	91.75	76.87	61.93	49.47	70.82	74.15	44.99	96.25	82.3	72.95	81.66	48.89
Lyreco UK Limited	74.61	49.85	74.66	68.4	54.91	78.75	55.54	56.83	62.99	94.66	77.19	59.05	57.95	72.25	46.29	57.16	81.02	68.88	55.41	52.46
Morna Laird Ltd	61.80	68.62	58.7	63.88	42.61	64.18	47.57	55.15	39.16	37.23	39.06	34.33	46.56	43.17	36.78	41.97	58.37	58.37	78.03	55.71
Nuline Medical							54.75							51.04		36.37		29.2		
PFG BRAND ATTRACTION EUROPE LIMITED	31.96	37.88	42.04	41.99	47.73	49.69	39.32	44.22	38.94	38.04	35.85	32.71	43.86	34.6	29.97	42.03	42.6	51.42	40.45	31.1
PLS Medical Limited	52.42	59.69				62		54.53						42.63					47.52	40.81
Protective Wear Supplies Ltd	81.08	44.34	70.03	91.75	81.95	72.99	82.28	54.91	54.63	52.09	45.55	47.23	54.89	64.08	91.75	50.87	55.31	55.31	73.06	91.75
Reliance Medical Ltd			92.25	92.1		58.92	39.45	50.88	47.06		51.92			44.22				49.94		
RS Components Limited	66.79	66.22	33.42	46.21	36.28	61.78	39.07	34.57	39.41	33.39	31.08	30.61	71.52	52.89	28.57	36.51	70.67	43.55	45.94	51.17
Solar Medical & Chemical Limited	89.75	38.03	84.91	82.23	67.13		61.82	38.1	49.1		45.59	48.5	62.25	60.69	46.63	56.46	64.41	64.41	63.93	57.28
Stax Trade Centres Limited	57.70	41.35	54.71	59.58	60.94			51.35	38.5	77.7	76.54			40.64	34.06	30.9			50.66	51.87
Stiven Limited	59.83	54.94	45.88	50.96		49.1	22.82	42.38						41.88	25.76	21.08	48.18	47.42	64.71	42.93
Streamline Corporate Limited	63.35	44.1	67.04	70.23	70.81	65.38	66.03	40.63	54.92	55.05	49.67		62.01	77.62		65.87	70.79	61.72	59.48	46.57
Sunbelt Rentals Limited	60.01	36.28	60.91	46.33	41.01	60.1	47.4	37.04	48	46.45	46.07		58.04	46.31		33.43			49.59	
T.R. Bonnyman, Son & Company Limited	64.86	75.44				68.55	40.69	68.95	66.27	70.54	56.34	54.65	67.72	77.97		43.05	71.84	71.84	72.22	48.66
The Guthrie Group Limited	82.32	60.93	78.74	75.38	79.27	77.31	98.5	56.71	54.07	50.33	45.76	44.55	50.99	60.1	40.39	43.45	82.2	79.3	84.79	70.21
Thomas Graham & Sons Limited	70.60	92.50	49.99	49.95	92.5	66.52	45.68	55.23	58.59	92.5	73.54	41.34	47.25	66.93	40.72	71.42	61.77	61.77	74.18	50.18
Unico Limited	80.74	76.63	76.63	76.53	52.62	74.81	57.66	66.75	58.27	56.88	51.81	50.7	65.88	75.25	46.81	69.19	99.21	85.62	70.77	78.89
Valmy Sas Ltd				47.24	18.74		41.93							46.11	38.25		17.76		57.94	

Appendix 3 - List of Recommended Suppliers with Living Wage Status

Tenderer	Accredited	Currently Progresaing through Real Living Wage accreditation process	Pay Real Living Wage to all employees, and committed to gaining accreditation over the intital 2 years of framework	Pay Real Living Wage to all employees but not accredited	Neither accredited nor paying Real Living Wage, but do commit to pay the Real Living Wage to all employees over the initial 2 years of the framework	Neither accredited nor paying Real Living Wage
Arco Limited	Yes					
Aspire Industrial Services Limited	Yes					
B.C.B. INTERNATIONAL LIMITED			Yes			
BACA Workwear & Safety Ltd				Yes		
BGS UK 2019 Ltd				Yes		
BLUETREE DESIGN AND PRINT LIMITED	Yes					
Bunzl UK Limited T/A Bunzl Greenham				Yes		
Cleaning & Wiping Supplies Ltd.	Yes					
Corston Sinclair Limited					Yes	
CREATIVE ACTIVITY GROUP LIMITED				Yes		
D.R. Caswell Limited	Yes					
Enviroclean Global Ltd				Yes		
Eumar Technology Limited	Yes					
Future Garments Limited T/A Eurox			Yes			
GIBB & BEVERIDGE (ENGINEERING AGENCIES) LIMITED						Yes
Global Health & Safety Ltd		Yes				
GMC Corsehili Ltd.					Yes	
Healthy Bean Ltd			Yes			
Ilasco Limited				Yes		
James Boylan Safety (NI) Ltd T/A JBS Group				Yes		
JW Brown Industrial Services, A Partnership				Yes		
Lion Safety Limited	Yes					
Lyreco UK Limited		Yes				
Mi Hub Limited Trading as Alexandra				Yes		
Morna Laird Ltd T/A McKinlay Workwear Supplies				Yes		
Nuline Limited			Yes			
P.F. Cusack (Tools Supplies) Limited				Yes		
PFG BRAND ATTRACTION EUROPE LIMITED	Yes					
PLS Medical Limited	Yes					
Polypak Plastene Limited				Yes		
Protective Wear Supplies Ltd			Yes			
Reliance Medical Ltd				Yes		
Rexel UK Limited						Yes
RS Components Limited						Yes
Solar Medical & Chemical Limited				Yes		
Stax Trade Centres Limited	Yes					
Stiven Limited	Yes					
Streamline Corporate Limited	Yes					
Sunbelt Rentals Limited	Yes					
T.R. Bonnyman, Son & Company Limited		Yes				
The Guthrie Group Limited				Yes		
Thomas Graham & Sons Limited				Yes		
Unico Limited	Yes		Yes			
Valmy SAS Ltd			Yes			

Appendix 4 – Segmentation classifications

0621 Supply & Delivery of Personal Protective Equipment (PPE) including Pandemic Recovery Items & Workwear is classified as Class A.

There are five segmentation classifications and these classifications are rated from Class A to Class E. Each classification has contract and supplier management activities associated with it based on pre-determined weighted criteria.

Class A

Due to the unique and bespoke nature of the frameworks that fall within this class, a contract management plan to be developed and agreed with CSG.

Class B

Quarterly supplier contact, six monthly surveys, annual UIG, frequent support to councils, suppliers and external stakeholders requiring high level of procurement expertise, extensive contract monitoring.

Class C

Six monthly supplier contact, six monthly to annual surveys, annual UIG, regular support to councils, suppliers and external stakeholders requiring procurement expertise, high contract monitoring.

Class D

Annual supplier contact, annual surveys, optional annual UIG, ad-hoc support to councils, suppliers and external stakeholders potentially requiring procurement expertise, regular contract monitoring.

Class E

Annual supplier contact (if required), optional annual surveys, no requirement for annual UIG, straightforward ad-hoc support to councils, suppliers and potentially requiring procurement assistance, basic contract monitoring.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

**Request for Associate Membership of Scotland Excel by
Scottish Enterprise**

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for our members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 Scottish Enterprise is a public corporation established by statute, namely, the Enterprise and New Towns (Scotland) Act 1990 with Scottish Ministers setting their objectives. Scottish Enterprise is Scotland's national economic development agency committed to growing the Scottish economy for the benefit of all, helping create more quality jobs and a brighter future for every region.
- 2.2 Scottish Enterprise is an accredited real living wage employer.

3. Associate Membership Process

3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.

3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, Scottish Enterprise can be recommended for associate membership access in accordance with the Local Authorities (Goods and Services) Act 1970, section 1 (1B)(b) as a public authority or body. Namely, that it has functions that are public in nature or engages in activities of that nature so long as the purpose or effect of access to Scotland Excel's services is to facilitate its discharge of those functions or activities.

3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

4.1 It is recommended to committee that Scottish Enterprise application to join Scotland Excel as an associate member be approved, with no annual fee as part of the reciprocal agreement and subject to the agreement document.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

**Request for Associate Membership of Scotland Excel by
Scottish Natural Heritage**

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 Scottish Natural Heritage is a public authority that was established from the Natural Heritage (Scotland) Act 1991. Scottish Natural Heritage's purpose is to promote, care for and improve our natural heritage, help people to enjoy nature responsibly, enable greater understanding and awareness of nature and promote the sustainable use of Scotland's natural heritage.
- 2.2 Scottish Natural Heritage is an accredited real living wage employer.

3. Associate Membership Process

- 3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.
- 3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, Scottish Natural Heritage can be recommended for associate membership access in accordance with the Local Authorities (Goods and Services) Act 1970, section 1 (1B)(b) as a public authority or body.
- 3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee, e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

- 4.1 It is recommended to committee that Scottish Natural Heritage application to join Scotland Excel as an associate member be approved, with no annual fee as part of the reciprocal agreement and subject to the agreement document.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Request for Associate Membership of Scotland Excel by Shire Housing Association Limited

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 Shire Housing Association Limited is located in East Ayrshire and has housing stock of 960 properties with a vision of delivering great homes for people within a vibrant community. Shire Housing Association Limited is a Registered Society (under the Co-operative and Community Benefit Societies Act 2014), and a Registered Social Landlord.
- 2.2 Shire Housing Association Limited is a real living wage employer but are not accredited.

3. Associate Membership Process

3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.

3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, Shire Housing Association Limited can be recommended for associate membership on the basis of the Local Authorities (Goods and Services) Act 1970 section 1 (1B)(c). Namely, that it has functions that are public in nature or engages in activities of that nature so long as the purpose or effect of access to Scotland Excel's services is to facilitate its discharge of those functions or activities.

3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee, e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

4.1 It is recommended to committee that Shire Housing Association Limited application to join Scotland Excel as an associate member be approved, with an annual fee of £1,440 subject to the agreement document.



Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Request for Associate Membership of Scotland Excel by The Skills Development Scotland Company Ltd

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for our members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 The Skills Development Scotland Company Ltd (SDS) is a private company limited by guarantee without share capital. The company is an Executive Non-Departmental Public Body. It is the national skills body supporting the people and businesses of Scotland to develop and apply their skills.
- 2.2 The Skills Development Scotland Company Ltd is an accredited real living wage employer.

3. Associate Membership Process

3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.

3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, The Skills Development Scotland Company Ltd can be recommended for associate membership access in accordance with the Local Authorities (Goods and Services) Act 1970, section 1 (1B)(c) as a public authority or body. Namely, that it has functions that are public in nature or engages in activities of that nature so long as the purpose or effect of access to Scotland Excel's services is to facilitate its discharge of those functions or activities.

3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee, e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

4.1 It is recommended to committee that The Skills Development Scotland Company Ltd application to join Scotland Excel as an associate member be approved, with no annual fee as part of the reciprocal agreement and subject to the agreement document.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Request for Associate Membership of Scotland Excel by MYtown MYcommunity Ltd

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for our members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 MYtown MYcommunity Ltd is a social enterprise supporting local economic development. The business will provide a wide range of support to the local community in North Lanarkshire including access to volunteering, training, and personal development opportunities, provide environmentally sustainable and carbon neutral distribution channels and develop a digital ecommerce platform
- 2.2 MYtown MYcommunity Ltd is a small social enterprise with only one employee at the moment but are committed to paying the living wage as they grow, along with an aspiration of becoming accredited.

3. Associate Membership Process

- 3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.
- 3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, MYtown MYcommunity Ltd can be recommended for associate membership access in accordance with the Local Authorities (Goods and Services) Act 1970 section 1 (1B)(c). Namely, that it has functions that are public in nature or engages in activities of that nature so long as the purpose or effect of access to Scotland Excel's services is to facilitate its discharge of those functions or activities.
- 3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee, e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

- 4.1 It is recommended to committee that MYtown MYcommunity Ltd application to join Scotland Excel as an associate member be approved, with an annual fee of £500 subject to the agreement document.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Request for Associate Membership of Scotland Excel by Fife Resource Solutions LLP

1. Background

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for our members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

2. Organisation Background

- 2.1 Fife Resource Solutions LLP is a Limited Liability Partnership and arm's length external organisation supporting Fife Council. Fife Resource Solutions provide waste management services for and on behalf of Fife Council. The services provided on behalf of Fife council are material processing, recycling and disposal of household waste, anaerobic digestion plant and operating recycling centres and points.
- 2.2 Fife Resource Solutions LLP is an accredited real living wage employer.

3. Associate Membership Process

3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.

3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, Fife Resource Solutions LLP can be recommended for associate membership of Scotland Excel on the basis of the Local Authorities (Goods and Services) Act 1970 section 1 (1B)(c). Namely, that it has functions that are public in nature or engages in activities of that nature so long as the purpose or effect of access to Scotland Excel's services is to facilitate its discharge of those functions or activities.

3.3 Fees are determined in a number of ways:

Arm's Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee, e.g., Housing Associations pay based on the number of houses within their portfolio.

4. Recommendations

4.1 It is recommended to committee that Fife Resource Solutions LLP application to join Scotland Excel as an associate member be approved, with no annual fee subject to the agreement document.

No fee will be charged due to their status as an arms-length external organisation of a local authority as their associate membership is considered as part of the overall local authority membership.

Scotland Excel

To: Executive Sub-Committee

On: 22 April 2022

**Report by:
Chief Executive of Scotland Excel**

Employee Supporting Attendance Report

1. Introduction and purpose of the report

In response to the Renfrewshire Council Internal Audit team recommendation, this report on organisational supporting attendance is submitted on a quarterly basis highlighting the absence rate in the organisation. The report also highlights the support mechanisms that the organisation has implemented to support staff members.

2. Scotland Excel Absence Management Target

The Joint Committee has previously agreed that Scotland Excel should work to an absence rate of below 4%. This target aligns Scotland Excel with partner organisations, supports good practice in this area and demonstrates the ongoing commitment to supporting employee attendance.

3. Overview of Attendance

In line with audit recommendations, the attached report has been prepared for the Executive Sub Committee. The report details:

- Breakdown of current month, last six months and last 12 months absence figures
 - Illustration of 12 months in days
 - Illustration of last 12 months in percentages

The report includes the latest absence details for the 12-month period to 31 March 2022. The rate of absence across the organisation has generally been maintained at or below the 4% target, except for April 2021 where the absence rate rose to 4.2% due to several long-term absences. The absence rate reduced steadily throughout 2021/22 to a low of 0.4% in February 2022.

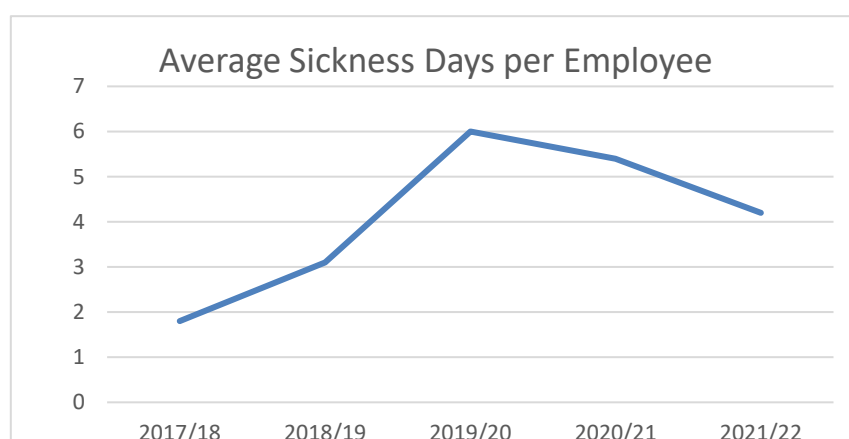
While Scotland Excel has been successful in reducing the absence rate during 2021/22, in March 2022 the rise in COVID-19 infections throughout the general population has been reflected in our own organisation with a number of employees reporting Covid-related illnesses. Those, together with some longer-term absences, resulted in a spike in the % rate to 3.1%.

However, overall, the rolling 6-month and 12-month average absence rates have been maintained at or below 3.1%. The absence rates for the reporting periods as shown in Appendix 1 are:

- previous 1 month to 3.1% (51 days)
- previous 6 months to 1.5% (152 days)
- previous 12 months to 2.2% (427days)

The graph below shows average sickness days per employee within Scotland Excel over the past 5 years.

Average sickness days reached a peak of 6 days per employee in 2019/20 which coincided with the rise of the Covid-19 pandemic and a number of long-term absences related to mental ill health. The rate has been steadily decreasing since then and the initiatives described below will continue to be utilised to support staff in maintaining attendance at work.



4. Overview of supporting attendance initiatives

In addition to actively supporting members of staff absent through ill health, Scotland Excel continues to implement positive early intervention practices including working with Occupational Health and other support services to maintain employee attendance and to support members of staff who may be experiencing difficulties while remaining at work.

Scotland Excel continues to support a range of interventions for staff including Occupational Health referral, confidential counselling services, and Cognitive Behavioral Therapy (CBT) sessions and issuing wellbeing emails with further information on health initiatives that can be accessed independently by all staff.

Scotland Excel recognises that positive mental health amongst staff members is an area that should be actively supported and encouraged. In addition to actively promoting good mental health practices and initiatives, the organisation has fifteen staff from across all operational areas and grades who have trained as accredited Mental Health First Aiders. In providing this confidential support opportunity to staff members it is hoped that any personal difficulties they may be experiencing can be addressed at an early stage with appropriate signposting to professional support.

Scotland Excel has also implemented a Mental Health at Work Commitment Action Plan which is recognised as a comprehensive tool for adopting best practice in promoting and maintaining positive mental health within the organisation.

5. Recommendation

The Executive Sub Committee is requested to note the contents of this report.

Appendix 1.

HR Report - Absence as at: March 2022

SCOTLAND
EXCEL

No of Employees During Period

101

Avg Absence Days per Employee

4.2

Absence Rate Last 12 Months

2.2%

Absences Current Month

Self Certified	Doctor Certified	Total Absences	Average Absence Rate
29.0	22.0	51.0	3.1%

Absences Last 6 Months

Self Certified	Doctor Certified	Total Absences	Average Absence Rate
70.0	82.0	152.0	1.5%

Absences Last 12 Months

Self Certified	Doctor Certified	Total Absences	Average Absence Rate
121.0	306.0	427.0	2.2%

