

Scotland Excel

To: Joint Committee

On: 17 June 2022

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

Annual Procurement Report

1. Introduction

The Procurement Reform (Scotland) Act 2014 (the Act) works alongside procurement regulations to provide a national legislative framework for sustainable public procurement.

The purpose of the Act is to support Scotland's economic growth through improved procurement practice. The Act focuses on a small number of general duties on contracting authorities regarding their procurement activities and some specific measures aimed at promoting good, transparent and consistent practice.

Since the introduction of the Act public bodies with an estimated procurement spend of £5 million or more must publish an annual procurement strategy (or a published revision of the previous strategy) and an annual procurement report. The Act sets out what, as a minimum, each annual procurement report must contain.

The annual procurement report provides relevant and proportionate information to provide transparency of purchasing activities in the preceding financial year. The report must be published as soon as reasonably practicable after the end of the financial year, which for Scotland Excel was 31st March 2022.

The statutory guidance on the publication of an annual procurement report states that it must address all matters contained in an organisation's procurement strategy.

2. Annual Reporting on Procurement in Scotland

The 2014 Act also requires Scottish Ministers to publish an annual report on procurement activity in Scotland. It provides a collated overview of public procurement activity and is informed by the individual annual procurement reports published by contracting authorities in Scotland.

Annual procurement reports are expected to be published no later than five months following the end of the contracting authority's financial year. For Scotland

Excel this means the annual procurement report for the financial year 2021/22 should be published no later than the end of August 2022, subject to approval from this committee.

The Scotland Excel annual report will then be considered along with those of other public bodies subject to this requirement and be included in the overview when the Scottish Ministers produce the national report.

3. Legislative Requirements

The Procurement Reform (Scotland) Act 2014 lists the minimum requirements that the annual procurement report must contain, as follows:

- (a) a summary of the regulated procurements that have been completed during the year covered by the report,
- (b) a review of whether those procurements complied with the authority's procurement strategy,
- (c) the extent that any regulated procurements did not comply, a statement of how the authority intends to ensure that future regulated procurements do comply,
- (d) a summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report,
- (e) a summary of any steps taken to facilitate the involvement of supported businesses in regulated procurements during the year covered by the report,
- (f) a summary of the regulated procurements the authority expects to commence in the next two financial years,
- (g) such other information as the Scottish Ministers may by order specify

4. Scotland Excel's Annual Procurement Report

The Scotland Excel Annual Procurement Report has been prepared, meeting the requirements of the Procurement Reform (Scotland) Act 2014 and is presented to the committee as Annex A. The presented content will be uploaded into an interactive format for publication.

5. Recommendation

Committee members are requested to note the content of this report and approve publication, on the Scotland Excel Website, of the Annual Procurement Report as provided at Annex A.

Annex A

**Scotland Excel
Annual Procurement Report
(1 Apr 2021 – 31 March 2022)**

Prepared May 2022

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Scotland Excel Annual Procurement Report 2020/21

Introduction

Scotland Excel is the Centre of Procurement Expertise for the local government sector, established in 2008. We are a non-profit shared service governed by a joint committee made up of elected representatives from Scotland's 32 local authorities.

The 32 local authorities share around 80% of the costs associated with operating Scotland Excel with the balance being generated by working with the sector, offering collaborative procurement support and commercial expertise.

Central to our operating model is the delivery of effective commercial solutions for our members. We offer a contract portfolio, with a value of c £2bn, which provides support to a wider range of local government services. Included in the portfolio solutions for social care services, construction and property management, roads, transport and fleet operations, environmental services, and a wider range of goods required for corporate and educational settings. We also provide in partnership with SEEMiS and The Digital Office a range of ICT services.

Contracts are developed in consultation with local government representatives, from procurement, commissioning and technical backgrounds, to ensure our services meet the needs of Scottish communities. The structure of the contractual arrangements is always designed to encourage innovation, facilitate policy delivery, support local economic priorities and enhance social value in communities.

Scotland Excel provides value to members by ensuring our contracts meet the duties laid down in the Procurement Reform (Scotland) Act 2014 ("the Act"). Section 18 of the Act requires public bodies that publish a procurement strategy to prepare an annual procurement report.

This annual procurement report will set out the performance of Scotland Excel against the organisational Strategy and summarise the value delivered through procurement activity. The report documents our performance against our objectives and strategic targets including those associated with Fair Work First and Community Benefit.

Scotland Excel publishes annually a revised Strategy which sets out the strategic direction for its procurement activity and details the context in which Scotland Excel will work to ensure value for money is achieved. In addition to the overarching Strategy, Scotland Excel also works with partners to articulate its approach to delivering an effective contract portfolio through its Sustainable Procurement Strategy and a suite of Category Strategies.

These targeted and specific approaches ensure Scotland Excel's portfolio has been developed with consideration to the wider social, economic and environmental priorities in a manner consistent the sustainable procurement duty under the Act.

Scotland Excel publishes the Annual Procurement Report via our website <http://www.scotland-excel.org.uk/>.

Section 1 Summary of Regulated Procurements Completed

Section 18(2) of the Procurement Reform (Scotland) Act 2014 requires organisations to include: “a summary of the regulated Procurements that have been completed during the year covered by the report”.

A regulated procurement is completed when the award notice is published or where the procurement process otherwise comes to an end. This includes contracts and framework agreements. Appendix 1- Part 1 provides a high-level summary of the regulated procurements Scotland Excel has completed between 1 April 2021 and 31 March 2022. The appendix includes the following:

- date the framework was awarded
- title of the arrangement, giving the subject matter of the procurement
- estimated value of the spend for the full life of the framework
- date from which the contract starts and is available for use
- date on which the contract ends
- names of each of the suppliers awarded a place on the framework

Scotland Excel also operates a small number of dynamic purchasing systems (DPS) which are unique in that new suppliers can apply to be added to these arrangements at any time. Appendix 1 – Part 2 shows suppliers appointed to the DPS for the Treatment and Disposal of Recyclable and Residual Waste between 1 April 2021 and 31 March 2022. During 2021/22 there were no additional suppliers appointed to the DPS for Bikeability Scotland Training Providers. Work began on a DPS to support Employability Services which will be awarded in 2022/23.

Section 2 Review of Regulated Procurement Compliance

Section 17 of the Act requires all regulated procurements to be carried out in line with the organisational procurement strategy. Section 18(2) states that an annual procurement report must include *“a review of whether those procurements complied with the authority’s procurement strategy”* and *“the extent to which any regulated procurements did not comply, and a statement detailing how the organisation will ensure that future regulated procurements do comply”*.

Scotland Excel’s approach to all procurement exercises is to construct the tender documents in line with a contract strategy. These strategies are developed with the User Intelligence group for the procurement exercise, ensuring it fulfils the requirements at point of use.

Contract Strategies also reflect and adhere to the values and principles set out in the overall Procurement Strategy. A review of each Contract Strategy is carried out as part of Scotland Excel’s established governance procedures. Throughout the Procurement Journey individual procurement exercises are reviewed, evaluated and monitored at Contract Steering Groups before proceeding to the next stage in the procurement process.

Commodity strategies reflect the Scotland Excel Procurement Strategy and ensure that procurement exercises follow a journey that embeds Scotland Excel’s principles, values and objectives. Templates used in each exercise ensure relevant factors are captured and recorded against each framework.

The Contract Steering Group is responsible for governance of each appointed milestone of the procurement process from contract initiation through to contract termination/expiration in line with the Governance Gateways. These Governance Gateways are designed to ensure all Regulated Procurements are carried out in a manner compliant with the Act and with the organisational goals. A summary of how this process is used operationally is presented at Appendix 2, including a table that sets out how the process was applied to live frameworks during the financial year 2021/22.

Our approach to strategic procurement maximises the added value potential in each procurement exercise. We conduct extensive market research and stakeholder consultation to establish the most effective blend of customer need to market capacity.

Key success factors are agreed in consultation with our members. Financial savings targets for each procurement exercise are projected at the strategy stage and suppliers are obliged to provide detailed spend information. Through effective contract management quantitative and qualitative aspects are monitored and reviewed.

Performance against our strategy and objectives for 2020/21 is given at Appendix 3. This part of the report summarises the progress made against operating plan commitments and uses a ‘traffic light’ symbol to provide a guide to the status of each activity.

Section 3 – Community Benefits and Fair Work Practices Summary

Section 18(2) of the Act states that it is mandatory for an annual procurement report to include “a summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report”.

Community benefit clauses in contracts and frameworks provide a means of achieving sustainability in public contracts. They can include, as examples, targeted recruitment and training, working with community enterprises and engagement with local interest groups. The requirement to include community benefits when awarded to Scotland Excel frameworks is universal. Achieving additional social value across Scotland through public spend with suppliers in the delivery of goods, services or works packages is integral to procurement good practice.

Scotland Excel incorporates community benefits in its procurement activities to drive greater sustainability. In doing so we contribute to the delivery of social, economic and environmental benefits delivered in our local authority areas. Tenderers are required to make a community benefits submission in respect of the spend they will receive through the relevant framework and this is monitored throughout the duration of the framework agreement. Through our contract management practices we promote and encourage the most impactful benefits available.

Benefits delivered are recorded through a return from each supplier. During 2021/22 further work was undertaken to consider how this process can be improved to ensure the benefits delivered are aligned to the needs of local communities and that the supplier base is able to report in an efficient manner. Presently Community Benefits information is collected from suppliers on a six-monthly basis. Scotland Excel’s process requires suppliers who receive spend greater than £50,000 over the preceding two quarters to produce a detailed breakdown of the community benefits they have provided.

The community benefits delivered are routinely reported to each meeting of Scotland Excel’s Joint Committee in June and December.

The information provided for the period 1st April 2021 to 31 March 2022 has been collated from those reported in December 2021 and new information gathered for the period from 1 October 2021 to 31 March 2022 and is as follows:

Total Monetary Value (£) of Other Community Benefits	Total Number of Hours of Work Experience for School Pupils, College and University Students	Total Number of Apprenticeships Recruited to Deliver Contract	Total Number of Work Placements For Adults	Total Number of Volunteering Hours	Total Number of full time Employees Recruited to Deliver Contract
£400,917	1292	41	39	607	432

Table 1.

‘Other Community Benefits’ encompass a range of benefits including donations and sponsorships of local clubs and community organisations. During the Covid 19 pandemic our community benefit return results continue to be positive and demonstrate the effective partnership Scotland Excel has created with framework suppliers which in turn maximises community benefits delivery. We gather many examples of community work undertaken by our suppliers during the previous financial year and early in 2021/22 that were in support of groups affected by lockdowns and additional to the contractual obligations of the framework.

Scotland Excel recognises that Community Benefits have a considerable social, environmental and economic impact within local communities and we continue to encourage and grow awareness in this regard. Scotland Excel uses a Community Benefit menu. This approach is widespread in public procurement and offers a focused approach to delivering benefit across the Scotland Excel portfolio. Included in Appendix 4 is a table summarising community benefits delivered and recorded against Scotland Excel frameworks since reporting started in 2013/14.

Furthermore, the management process encourages suppliers and providers to deliver Community Benefits within the awarding local authority area. During 2022/23 further work is planned to ensure all opportunities for delivery of community benefits to carried out are taken up by our members.

Another important aspect of our framework development is the inclusion of Fair Work practices, in August 2021 the Scottish Government updated guidance and aligned recommendations with Fair Work First policies. This saw an expansion of the guidance from five elements to seven. Fair Work First asks that businesses bidding for a public contract commit to adopting the following:

- appropriate channels for effective voice, such as trade union recognition
- investment in workforce development
- no inappropriate use of zero hours contracts
- action to tackle the gender pay gap and create a more diverse and inclusive workplace
- providing fair pay for workers (for example, [payment of the real Living Wage](#))
- offer flexible and family friendly working practices for all workers from day one of employment
- oppose the use of fire and re-hire practices.

Public bodies were asked to apply the new guidance to procurement exercises starting after 31 October 2021. In addition, on 15th October 2021 the Scottish Government published a statement in which they outlined their intention to mandate the payment of the Real Living Wage where legally possible.

Scotland Excel has included formal consideration of the payment of the Living Wage in tenders issued since early 2015. Each Contract for Approval report to Scotland Excel's Executive Sub Committee includes information on the respective position of all bidders work practices, including payment of the Living Wage. In February 2022 the Executive Sub Committee were invited to note an update on matters relating to the payment of the Real Living Wage in which Scotland Excel confirmed intent to seek means of improving the level of commitment suppliers make to paying the Real Living Wage and to mandate wherever legally possible.

Of the 213 suppliers appointed to Scotland Excel framework agreements between 1 April 2021 and 31 March 2022, 84% notified that they pay the Living Wage.

There are 958 unique suppliers appointed to Scotland Excel framework agreements, each have provided data on their Living Wage accreditation status. The breakdown of the status of these suppliers is set out in Table 2 below, recorded in the following categories, recognising the accreditation of some suppliers and the self-assessment of others. Overall 86% of Scotland Excel suppliers are paying the Living Wage with a further 4% committed to paying the Living Wage within 2 years.

Accredited	Progressing towards accreditation	Committed to gaining accreditation over the first 2 years of the framework	Not accredited but paying the Living Wage	Not accredited or paying the Living Wage but committed to doing so within 2 years	Neither accredited nor paying Living Wage
211	56	89	467	38	97

Table 2

Scotland Excel currently has a total 1076 unique suppliers across all supply agreements. Living Wage accreditation status is not asked of suppliers being qualified for a place on a DPS, nor is it gathered when working in partnership with Crown Commercial Services (UK Government collaborative procurement body).

Scotland Excel continues to ensure its policy is set out within the tender process and that relevant aspects of fair work are referenced in each framework. Scotland Excel continues to monitor and encourage the implementation of fair working practices during the active period of frameworks and to work closely with suppliers to enhance performance.

Appendix 4 includes the breakdown of the council areas in which the figures presented in Table 1. above have been achieved.

Section 4 – Supported Businesses Summary

Section 18(2) of the Act requires organisations to summarise steps taken to facilitate the involvement of supported businesses in regulated procurement. Scotland Excel recognises that supported businesses provide a crucial contribution to the Scottish economy.

Supported businesses are defined as: *“an economic operator whose main aim is the social and professional integration of disabled or disadvantaged persons where at least 30% of the employees are disabled or disadvantaged”*. Contracts may be reserved for those businesses meeting these criteria.

At Scotland Excel the involvement of supported businesses in regulated procurements is considered at the strategy development stage. As commodity strategies are mandatory for all regulated procurements undertaken by Scotland Excel, the involvement of supported businesses is therefore considered in all regulated procurements.

Within the portfolio of contracts reviewed in 2021/22 no contracts were reserved for supported businesses. However, in line with the sustainable procurement duty and procurement strategy all procurement exercises undertake a sustainability assessment. Due diligence in this way means evaluations are conducted to determine ways in which sustainability, including the use of supported businesses can be maximised.

We explore appropriate ways to include supported businesses in our frameworks as demonstrated by the appointment Scotland's Bravest Manufacturing Company within our Roads Signage Materials Framework. During 2021 a potential opportunity was explored when tendering for Personal Protective Equipment (PPE). The market for PPE has evolved since the Coronavirus pandemic created the need for items of PPE associated with infection control. Scotland Excel aimed to offer opportunities to the widest supply base possible to ensure new entrants and smaller, more socially constituted businesses could bid. One mechanism explored was the inclusion of a lot within the framework being reserved to attract any support businesses with PPE products to offer. This approach could not be developed into a legally compliant model. A separate reserved contract alone for PPE would not have met the needs of the customer base in terms of range or volumes of products so the tender was issued without reservation. However, to ensure we continue to support this developing market Scotland Excel has included a reserved framework for supported businesses offering PPE products in our planned procurements scheduled for 2022/23 (see Appendix 4).

Scotland Excel offers a domestic furnishing framework which supports new tenancies and welfare support for those with housing needs. In recognition of the prevalence of supported businesses operating in the domestic furniture and furnishings market Scotland Excel has listed a small number of items, which can be sourced from supported businesses. These are labelled “Supported Business” under the category column and include bedroom and living room items. These items are introduced as an opportunity to establish supply chain relations which can be developed over the lifetime of the framework.

We also work with our framework suppliers to drive partnership relationships with supported businesses. Our New Build Residential framework has clauses within it which seek the involvement in the supply chains of the awarded construction companies.

Scotland Excel understands supported businesses can make a key contribution to local impact, are vital to the Scottish economy and that they provide essential job opportunities for disabled and disadvantaged people within our communities which enable them to become more independent, while also delivering a range of excellent goods and services. Scotland Excel will continue to work with councils and suppliers to promote working relationships with their local supported businesses.

Section 5 – Future Regulated Procurements Summary

Section 18(2) of the Act states it is mandatory that an annual procurement report must include “a summary of the regulated procurements the authority expects to commence in the next two financial years.”

Scotland Excel provides information on its portfolio to appropriate levels of transparency and proportionality, to encourage competition and to achieve better value for money. Scotland Excel will continue to engage and communicate with our framework users and potential suppliers. Each framework process is started with the issue of a Prior Information Notice consistently providing advance notice of future opportunities.

Scotland Excel has fifty-four regulated procurements due for renewal (or subject to contract extension) over the next two financial years. In addition, Scotland Excel plans to complete regulated procurements for four new contract areas in financial year 2021/22. Details of these anticipated contract requirements are shown in Appendix 4.

Section 6 – Additional Considerations

At Scotland Excel, we are leaders of change in the way commercial activities within the Scottish public sector are undertaken. An ongoing driver of our development has been to raise the profile of procurement in our sector.

Our vision is: To provide innovative, transformative solutions for local and national public services across Scotland.

Our Mission is: To make the most of our strategic procurement expertise and our experience of developing collaborative solutions which support better outcomes for Scotland's people and communities through early intervention and the delivery of sustainable public services

The following principles, which were developed by staff from across the organisation, guide our approach to our work.

- Professional - We establish goals and objectives to achieve excellence and demonstrate leadership in everything we do.
- Courageous - We listen with an open mind and respond honestly and constructively.
- Respectful - We achieve the best possible outcomes through our determination, resilience and innovation.
- Integrity - We are transparent and fair in all our actions securing trust and building confidence.

Since Scotland Excel was formed in 2008 local authorities have worked with us to realise the potential of procurement and associated disciplines to shape markets, support policy priorities and ensure the delivery of sustainable services, needed in every community.

Our services are designed to help councils meet the twin challenges of reducing budgets and growing demand. Scotland Excel and councils working jointly can maximise social, economic and environmental benefits in an efficient and collaborative manner. Working together ensures money is saved to protect front line services.

Scotland Excel also offers an award-winning learning and development programme, and provides assessment, consultancy and improvement services to help councils transform their procurement capability.

We represent the sector at a national level on matters relating to public procurement and provide procurement support for a range of national sector initiatives.

At Scotland Excel, we are committed to demonstrating innovation and continuous improvement in everything we do. We are delighted to have won several awards for our work. We also hold accreditations which reflect our commitment to best practice in procurement, organisational development and workforce matters.

CIPS Corporate Certification Standard - This award signifies that we have all the procurement governance mechanisms in place for effective supply assurance and compliance.

Investors in People (IIP) - IIP is a UK government initiative, providing a best practice people management standard, and is regarded as an indication that Scotland Excel is a great employer, an outperforming place to work and has a clear commitment to sustainability.

Chartered Management Institute Approved Centre- Scotland Excel is an approved centre for the delivery and assessment of CMI leadership and management qualifications.

Living Wage - Scotland Excel is proud to be a Living Wage employer. Living wage is a voluntary hourly rate set independently and updated annually, calculated according to the basic cost of living in the UK

Appendix 1 – Part 1

Procurements Completed

1 April 2021 to 31 March 2022

Award Date	Short Contract Title	Total Contract Value	Contract Start Date	Contract End Date	Supplier Name	Schedule Number
01/04/2021	Supply Teacher And Other Bookings	£1,200,000	01/04/2021	31/03/2025	Alvius Limited	0421
					Cloud Cover It Services Ltd	0421
					Eteach Uk Ltd	0421
					Just Education Ltd	0421
					Teacher Booker Ltd	0421
26/05/2021	Vehicle Parts	£48,000,000	26/05/2021	31/03/2024	A M Phillip Trucktech Limited	0720
					Aebi Schmidt Uk Ltd	0720
					Alliance Automotive Uk Lv Limited	0720
					Arnold Clark Automobiles Ltd (T/A Arnold Clark)	0720
					Autoparts Stornoway Ltd	0720
					Bowen Fluid Engineering Limited	0720
					Brush Technology Ltd	0720
					Cartwright Fleet Services (glasgow) Ltd	0720
					DAF Trucks Ltd	0720
					Dennis Eagle Limited	0720
					Dingbro Ltd.	0720
					Econ Engineering Ltd	0720
					Farid Hillend Engineering Limited	0720
					Faun Zoeller Uk Limited	0720
					Fleet Factors Ltd	0720
					Fluidtek Services Limited	0720
					George Parker Hoses	0720
					Highland Motor Parts Limited	0720
					Highland Windscreen Services	0720
					Hydrasun Limited	0720

08/06/2021	Waste Composition Analysis	£3,000,000	09/06/2021	08/06/2025	Hydraulink Ltd	0720
					Masterparts (Bellshill) Ltd	0720
					Mgm Hoses Ltd T/a Pirtek Paisley	0720
					National Windscreens (Replacements) Ltd.	0720
					Plant Glazing Ltd	0720
					Prime Industrial & Janitorial Supplies Ltd	0720
					Robert Innes T/a Southwest Windscreens	0720
					Scotia Bearings & Hydraulics Ltd	0720
					Strathclyde Windscreens Limited	0720
					Volvo Group Uk Ltd T/a Volvo Truck And Bus Centre North & Scotland	0720
01/07/2021	Fostering	£136,000,000	01/07/2021	30/06/2024	Windscreen Services (argyll) Ltd	0720
					Albion Environmental Limited	1520
					Alfred H Knight Energy Services Limited	1520
					Integrated Skills Limited	1520
					Resource Futures Limited	1520
					RPS Consulting Services Ltd	1520
					Aberlour Child Care Trust	1020
					Action For Children	1020
					Barnardo's	1020
					Carevisions Fostering Limited	1020
14/07/2021	Organic Waste	£48,000,000	14/07/2021	30/06/2024	Carolina House Trust	1020
					Dean And Cauvin Trust	1020
					Foster Care Associates Scotland Limited	1020
					Foster Care Connect Ltd.	1020
					Fostering People Scotland Limited	1020
					Fostering Relations Limited	1020
					Fosterplus (Fostercare) Ltd	1020
					St Andrew's Children's Society Limited	1020
					Swiis Foster Care Scotland	1020
					The Adolescent And Children's Trust	1020
14/07/2021	Organic Waste	£48,000,000	14/07/2021	30/06/2024	The National Fostering Agency (scotland) Ltd	1020
					Brewster Brothers Limited	0220
					Cireco Scotland Llp	0220
					Earnside Energy Ltd	0220

25/08/2021	Education Materials	£70,000,000	25/08/2021	31/07/2024	Energen Biogas	0220
					Enva Organics Recycling (formerly Gp Green Recycling)	0220
					Forth Resource Management Ltd	0220
					Keenan (recycling) Limited	0220
					Levenseat Ltd	0220
					Scottish Water Horizons	0220
					Bishop Sports and Leisure Limited	1220
					Clyde Paper & Print	1220
					Collaborate & Innovate Ltd T/a Cosy Direct	1220
					Espo Joint Committee Of Local Authorities	1220
					Findel Education Limited T/a Hope Education	1220
					Foams 4 Sports Ltd	1220
					Grosvenor House Papers Ltd	1220
					Hamelin Brands Limited	1220
					Inc Dot Com Limited	1220
					Inivos Limited T/a Edulab	1220
					Kent County Council T/a Kcs	1220
					Muddy Faces Ltd	1220
					Newitt & Co Ltd	1220
					Rm Educational Resources Ltd T/a Consortium Tts	1220
13/08/2021	Education And Office Furniture	£32,000,000	01/09/2021	31/08/2025	Scientific & Chemical Supplies Ltd	1220
					Scientific Laboratory Supplies Limited	1220
					Seawhite Of Brighton Limited	1220
					Tts Group Ltd	1220
					W. Enterprises (Abdn) Ltd	1220
					Wf Education Group Limited	1220
					Yorkshire Purchasing Organisation	1220
					Active Office Scotland Ltd	0620
					Alpha Marketing Scotland Limited	0620
					Azzurro Ltd	0620
					Caley Print & Stationery Ltd T/a The Caley Group	0620
					Claremont Office Furniture Ltd	0620
					Community Playthings (Community Products (UK) Ltd)	0620
					Complete Business Solutions Group Limited	0620

13/09/2021	Telecare DPS	£40,000,000	13/09/2021	10/01/2031	Eightspace Llp	0620
					Equip4work Ltd T/a Office Furniture Online	0620
					Findel Education Limited T/a Hope Education	0620
					Langstane Press Limited	0620
					Mclaughlin & Harvey Limited	0620
					Morleys (bicester) Ltd	0620
					North Central Office Ltd.	0620
					Rm Educational Resources Ltd T/a Consortium Tts	0620
					Saxen Ltd	0620
					Sharp Business Systems Uk Plc	0620
					Spaceright Europe Ltd	0620
					Spaces Taylored Ltd	0620
					Wagstaff Bros., Limited T/a Wagstaff Interiors Group	0620
					Yorkshire Purchasing Organisation	0620
					Alcuris Ltd	1620
					Appello Smart Living Solutions Limited	1620
					Chiptech International Limited	1620
					Chubb Fire & Security Limited	1620
					Doccla UK Limited	1620
					Doro Care (UK) Limited	1620
29/10/2021	Online School Payments	£8,000,000	29/10/2021	19/09/2025	Legrand Electric LTD	1620
					Masimo Europe Limited	1620
					Possum LTD	1620
					Salveas Ltd trading as Synaptik	1620
					SECOM plc	1620
					Secure Meters (UK) Ltd	1620
					Secureshield Ltd	1620
					TeleAlarm Europe GmbH	1620
					Tunstall Healthcare (UK) Limited	1620
					Cash Registers (Buccleuch) Limited	0520
					Civica UK Ltd	0520
					Nutritics Limited	0520
					Parentpay Ltd	0520
					Sf Software Ltd T/a Pebble	0520

17/01/2022	Recycle And Refuse Containers	£50,000,000	17/01/2022	08/12/2024	Bio Pack Limited	0721
					Broxap Limited	0721
					Contenur (uk) Ltd	0721
					Coral Products (Mouldings) Ltd	0721
					Craemer Uk Limited	0721
					Cromwell Polythene Limited	0721
					Egbert H. Taylor And Company Limited	0721
					Ese World Limited	0721
					Imperial Polythene Products Limited	0721
					J & H.m. Dickson Limited	0721
					Leaffield Environmental Limited	0721
					One51 Es Plastics (uk) Limited T/a Mgb Plastics	0721
					Opalion Plastics Limited	0721
					Orwak Easi Uk Ltd	0721
					Ridley Recycling Limited T/a Peter Ridley Waste Systems	0721
					Sai-pac (uk) Limited	0721
					Ssi Schaefer Limited	0721
					Storm Environmental Limited	0721
					Straight Manufacturing Limited	0721
					The Compost Bag Company Ltd	0721
					Uk Container Maintenance Limited	0721
					Weir & Carmichael Ltd	0721
					Wybone Limited	0721
16/02/2022	Energy Efficiency Contractors	£800,000,000	16/02/2022	31/01/2025	A.c. Whyte & Co. Ltd	1320
					Ailsa Building Contractors Limited	1320
					Alternative Heat Limited	1320
					BCA Insulation Ltd	1320
					Brb Electrical Limited	1320
					British Gas Social Housing Limited	1320
					C R Smith Glaziers (dunfermline) Limited	1320
					Ccg (scotland) Limited	1320
					Changeworks Resources For Life	1320
					City Building (Contracts) LLP	1320
					City Technical Services (UK) Ltd	1320

E.on Energy Solutions Ltd	1320
Easy Heat Systems Ltd	1320
Ecd Architects Ltd	1320
Ej Parker Technical Services (scotland South) Ltd	1320
Emtec Energy Ltd	1320
Energy Agency	1320
Epc Scotland Limited	1320
Everwarm Ltd	1320
Fes Support Services Ltd	1320
G.m.g. (contractors) Limited	1320
Gep Environmental Limited	1320
Green Home Systems Limited	1320
Hardies Llp	1320
Hyperion Zero Ltd	1320
Insulated Render Systems (scotland) Ltd.	1320
Insulation Solutions (scotland). Limited	1320
Jonathan Mcfarlane T/a Home Energy Lanarkshire	1320
Kensa Contracting Limited	1320
Momentum 4 Ltd	1320
Mp Group U K Limited	1320
Ovo (s) Energy Solutions Limited	1320
Procast Building Contractors Ltd.	1320
Reheat (renewable Technologies) Ltd	1320
Renewable Energy Consultants (scotland) Limited	1320
Sers Energy Solutions (Scotland) Ltd	1320
Shire Energy Services Limited	1320
Shs Heating And Renewables Limited	1320
Story Contracting Limited	1320
Sustainable Building Services (UK) Ltd	1320
The Wise Group	1320
Tighean Innse Gall Limited	1320
Union Technical Services Ltd	1320
Valley Group Limited	1320
Vital Energi Utilities Limited	1320

					Warmworks Scotland Llp	1320
18/02/2022	Tyres for Vehicles and Plant	£26,000,000	21/02/2022	31/01/2026	Alba Tyre Management Ltd	0221
					Angus Tyres Ltd	0221
					Direct Tyre Management Ltd	0221
					H & S Group 1 Ltd T/a Go Mobile	0221
					Kenway Tyres Ltd	0221
					McConechy's tyre service Ltd	0221
					Michelin Tyre Public Limited Company	0221
					R&J Strang Tyre Services	0221
					Redpath Tyres Ltd	0221
					Soltyre Ltd	0221
					Tructyre Fleet Management Limited	0221
					Vaculug Limited	0221
					D J Campbell & Son	0521
					Grahams the Family Dairy Ltd	0521
					Müller UK & Ireland Group Llp T/a Müller Milk & Ingredients	0521
					Swansons Fruit Company Limited	0521
02/03/2022	Heavy Vehicles	£100,000,000	02/03/2022	31/12/2023	A M Phillip Trucktech Limited	0321
					Aebi Schmidt Uk Ltd	0321
					Ballard Motive Solutions Ltd.	0321
					Bls Commercials Ltd T/a Bls Truck & Van	0321
					BMI Trailers Ltd	0321
					Bucher Municipal Ltd (previously Johnston Sweepers Ltd)	0321
					C P Davidson & Sons Ltd	0321
					Ciceley Commercials Ltd	0321
					Daf Trucks Limited	0321
					DAF Trucks Ltd	0321
					Dennis Eagle Limited	0321
					Econ Engineering Ltd	0321
					Farid Hillend Engineering Limited	0321
					Faun Zoeller Uk Limited	0321
					Geesink Norba Ltd	0321
					Harsh Limited	0321
					Hiab Ltd	0321

James A. Cuthbertson, Limited	0321
John G. Russell (transport) Limited	0321
Karcher (u.k.) Limited	0321
Lothian Vehicle Bodybuilders Ltd	0321
Macpac Refuse Bodies Ltd	0321
MAN Truck & Bus UK Ltd	0321
Mellor Coachcraft (Woodall Nicholson Ltd)	0321
Mercedes-Benz Trucks Uk Ltd	0321
Multevo Limited Trading As Multihog Uk Limited	0321
Ntm-gb Ltd*	0321
Nu-Track Ltd	0321
Renault Truck Commercials Limited T/a Renault Trucks Scotland	0321
Riverside Truck Rental Ltd	0321
Romaquip Ltd	0321
Scania (G.B.) Ltd	0321
Scarab Sweepers Ltd	0321
Stock Sweepers Limited	0321
Treka Bus Ltd	0321
Volvo Group Uk Ltd T/a Volvo Truck And Bus Centre North & Scotland	0321
Whale Tankers Ltd	0321
Woodall Nicholson Ltd T/a Mellor Coachcraft	0321

Appendix 1 – Part 2 Appointments to DPS for

Treatment and Disposal of Recyclable and Residual Waste

New Entrants

Service Provider Name	Lots Approved	Effective Date
VIRIDOR DUNBAR WASTE SERVICES LIMITED	Lots 4,5,7,8,10,11,16,19,21 and 22	1st April 2021
MKD32 Ltd	Lot 3	8th April 2021
DALTON GROUP LIMITED	Lot 4,7 and 10	28th May 2021
SIBELCO UK LIMITED	Lot 3	15th July 2021
TAYLORS INDUSTRIAL SERVICES LIMITED	Lots 11-14 and 16-22	8th November 2021
Wm Hamilton & Sons Limited	Lot 17	2nd December 2021
Henry Waste Management Limited	Lot 8 and 13	10th January 2022

New Offers

Service Provider Name	Additional Lots Approved	Effective Date
Hamilton Waste Recycling Limited	Lot 3	21st April 2021

Removed from DPS

Service Provider Name	Lots	Effective Date
Viridor Waste Management Limited	Lots 1,2,4,5,8,10,11,13,21,22	29/11/2021

Appendix 2

Governance (Procurement Process) Gateways and application to contracts in 2021/22

	Process Stage
1	Contract Initiation
2	Market Research and Analysis
3	Communicate Strategy Pack to UIG for Review
4	Strategy Approved
	4a Initial Approval
	4b. Alignment with overall corporate objectives
	4c Approach for Participation & Benchmarking
	4d. Sustainable Procurement Duty
	4e. Authorise release to UIG & CPMs for information with benchmarking requests
5	Draft PQQ
6	PQQ Approved (sub -stages subject to use of Restricted Process)
7	Tender Documents Approved
	7a Overall Tender Approved
	7b Approved that Strategy Requirements met
	7c Evaluation Methodology and Weightings Approved
8	ITT Issued via PCS and benchmarking templates to Councils
9	Tender Period (Incl Clarifications)
10	Tender Return Date - Any Extension?
11	Tenders Opened and Recorded
12	Tender Analysis Evaluation
13	Tender Evaluation Approved (includes 5 substages)

	Process Stage
14	Prepare Sub Executive Committee Report
15	PTN Approved
16	Conduct PTN
17	Executive Sub-Committee Report Approved
18	Executive Sub-Committee Authorisation to Award
19	Prepare and Issue Standstill Letters
20	Standstill Period
21	De-brief Unsuccessful Tenderers
22	Standstill Period Expired
23	Prepare Contract Award Letters
24	Contract Award Letters Issued
25	Contract Award Notice Approved
26	Contract Award Notice Published
27	Mobilisation Implementation Plan
28	Contract Start Date
29	Contract Management Annual Review
	29a Overall CM Report Approved
	29b Approved Strategy Requirements/Agreed Variations met
	29c Next Steps Plans Approved
30	Extension Reports subject to terms of F/work (incl Approval Requests)






Contract	Report Type						
	Option Appraisal	Strategy	Evaluation Methodology	Recommendations	Exec Sub Committee Report	Annual Report	Extension Report
Asbestos							20/05/2021
Boiler Maintenance							26/08/2021
Books							27/01/2022
Building and Timber							08/03/2022
Building Consultancy		01/07/2021	26/08/2021				
Children Residential	08/11/2021 & 13/12/2021	24/02/2022	28/03/2022				08/03/2022
Community Meals						27/07/2021	24/02/2022
Demolition and Deconstruction Services							24/02/2022
Digital Publications		30/11/2021	14/12/2021				
Education & Office Furniture				25/05/2021	01/06/2021		
Education Materials				25/05/2021	01/06/2021		
Electrical Materials							08/03/2022
Employability Services		01/02/2022	01/02/2022				
Energy Advice							29/07/2021
Energy Efficiency Contractors				25/11/2021	18/11/2021		08/04/2021 & 13/09/2021
EV Charging Infrastructure		03/06/2021	25/10/2021	28/03/2022			
First Aid Materials							06/07/2021
Fostering				04/05/2021	20/05/2021		
Fresh Bread & Rolls							18/01/2022
Fresh Fruit & Veg							18/01/2022
Fresh Meat							06/07/2021
Frozen Foods			12/08/2021	16/12/2021	13/01/2022		
Grounds Maintenance Equipment							01/02/2022
Heavy and Municipal Vehicles		09/07/2021	08/09/2021	11/01/2022	13/01/2022		
Hot Beverages							27/07/2021
Janitorial Products						30/11/2021	
Library Books and Textbooks		30/11/2021	14/12/2021				
Milk		01/07/2021	20/07/2021	04/11/2021	04/11/2021	21/10/2021	
Musical Instruments		09/09/2021	09/09/2021	23/11/2021	23/11/2021		
Online School Payments			22/04/2021	12/08/2021	24/08/2021		
Organic Waste				27/05/2021	01/06/2021		
Outdoor Play			14/10/2021				14/10/2021
Pest Control		24/08/2021	21/09/2021	27/01/2022	03/02/2022		
Plumbing Materials							08/03/2022
Power Tools							08/11/2021
PPE		08/10/2021	20/01/2022				12/08/2021
Recycle and Refuse Containers		01/07/2021	22/07/2021	04/11/2021	18/11/2021		
Repair and Maintenance of Catering Equipment		08/12/2021					
Secure Care							09/07/2021
Social Care Agency Workers		24/02/2022					28/03/2022
Trade Materials							08/11/2021
Treatment and Disposal of Recyclable and Residual Waste						19/10/2021	
Tyres for Vehicles and Plant		06/05/2021	09/09/2021	14/12/2021	11/01/2022		
Vehicle and Plant Hire			04/11/2021	01/03/2022	03/03/2022		
Vehicle Parts				06/04/2021	08/04/2021		
Washroom Solutions						19/10/2021	
Waste Composition Analysis				08/04/2021	22/04/2021		
Working at Heights		29/07/2021					

Appendix 3

Review of Regulated Procurement - Performance against our strategy, operating plan and objectives for 2021/22

Progress reports are produced quarterly to track Scotland Excel's activity against 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.

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




The following report provides an update on activities undertaken during financial year to 31 March 2021. The majority of activities have progressed in line with plans and are indicated by a green symbol. A small number of project-based activities have not been fully delivered in line with plans and are indicated as amber or red. (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

Progress Report (2021/22)






Goa1 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






			<p>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.</p>
	<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.


Goa1 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






			<p>innovations, and changes to working practices. A new tool is being developed to calculate the levels of embodied carbon in construction materials.</p>
<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.



Goa1 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 come 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.
3.4 Implement policies which develop, empower, value and engage our workforce	<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.

Goa1 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

Appendix 4

Community Benefits and Fair Work

	2013/ 2014	2014/ 2015	2015/ 2016	2016/ 2017	2017/ 2018	2018/ 2019	2019/ 2020	2020/ 2021	2021/22	Total
No of Apprentices	9	92	49	18	52	34	37	26	41	358
No of New Jobs	78	43	29	53	146	280	249	340	432	1,650
No of Work Placements	0	5	6	17	30	107	43	47	39	294
Hours of Volunteering & Mentoring	95	377	1279	1570	1637	803	853	608	607	7,829
Hours of Work Experience	5305	28214	16734	7852	2541	667	10,360	19	1292	72,984
Value of Other Community Benefits	£2,474	£16,550	£46,140	£87,814	£311,549	£437,443	£901,410	£858,590	£400,917	£3,062,887

Community Benefits by Council 1 October 2021 to 31 March 2022

Council	Total Monetary Value (£) of Other Community Benefits	Total Number of Hours of Work Experience for School Pupils, College and University Students	Total Number of Apprenticeships Recruited to Deliver Contract	Total Number of Work Placements For Adults	Total Number of Volunteering Hours	Total Number of Employees Recruited to Deliver Contract
TOTAL	£165,503	624.26	15.56	10.13	180.98	218.50
Aberdeen City Council	£4,638	0.00	0.00	0.00	0.00	6.00
Aberdeenshire Council	£11,298	0.00	0.00	0.00	0.00	3.26

Angus Council	£0	0.00	0.00	0.00	0.00	0.00
Argyll & Bute Council	£1,200	0.00	0.00	0.00	0.00	0.00
Associate Member	£0	0.00	0.00	0.00	0.00	0.00
City Of Edinburgh Council	£30,729	282.00	3.00	0.50	4.48	3.40
Dumfries & Galloway Council	£1,643	0.00	0.20	0.00	0.00	0.00
Dundee City Council	£2,900	0.00	0.00	0.00	0.00	8.00
East Ayrshire Council	£2,500	0.00	0.00	0.00	0.00	1.20
East Dunbartonshire Council	£2,112	0.00	0.00	0.00	0.00	0.20
East Lothian Council	£200	2.00	0.00	0.00	3.00	2.00
East Renfrewshire Council	£1,203	0.00	0.00	0.00	0.00	0.80
Falkirk Council	£12,674	0.00	0.00	0.00	0.00	0.00
Fife Council	£23,779	0.00	0.25	1.00	0.00	3.00
Glasgow City Council	£8,919	0.00	3.00	0.80	173.50	15.00
Highland Council	£4,825	0.00	3.00	0.00	0.00	1.00
Inverclyde Council	£0	0.00	0.00	0.00	0.00	0.25
Midlothian Council	£0	0.00	0.00	0.00	0.00	1.25
North Ayrshire Council	£5,423	0.00	0.00	0.00	0.00	1.20
North Lanarkshire Council	£6,356	56.00	0.00	0.00	0.00	6.60
Orkney Islands Council	£0	0.00	0.00	0.00	0.00	3.85
Perth & Kinross Council	£9,450	0.00	0.00	0.00	0.00	1.00
Renfrewshire Council	£250	0.00	1.00	0.00	0.00	79.20
Scottish Borders Council	£1,400	0.00	0.00	0.00	0.00	0.80
South Ayrshire Council	£4,684	0.00	0.00	0.00	0.00	1.65
South Lanarkshire Council	£11,657	284.18	5.00	7.70	0.00	69.40
Stirling Council	£1,000	0.08	0.00	0.08	0.00	0.00
The Moray Council	£7,520	0.00	0.00	0.00	0.00	0.00
West Dunbartonshire Council	£626	0.00	0.11	0.05	0.00	0.50
West Lothian Council	£8,519	0.00	0.00	0.00	0.00	8.94

The preceding six months of delivery was reported to the December 2021 meeting of the Scotland Excel Joint Committee and can be reviewed [here](#)

The total by Council for the full financial year is presented in the table below and summarised in Section 3 of this report.

Council	Total Monetary Value (£) of Other Community Benefits	Total Number of Hours of Work Experience for School Pupils, College and University Students	Total Number of Apprenticeships Recruited to Deliver Contract	Total Number of Work Placements For Adults	Total Number of Volunteering Hours	Total Number of Employees Recruited to Deliver Contract
TOTAL	£400,917	1,292	40.8	39	607	431
Aberdeen City Council	£10,647	64			5	12
Aberdeenshire Council	£23,352	24				14
Angus Council	£2,508					
Argyll & Bute Council	£4,056					
City Of Edinburgh Council	£48,761	408	5.0	2	114	13
Clackmannanshire Council	£2,075					4
Dumfries & Galloway Council	£3,607		0.2			6
Dundee City Council	£5,487				24	12
East Ayrshire Council	£8,626					2
East Dunbartonshire Council	£9,418				20	1
East Lothian Council	£5,734	62	1.3		3	6
East Renfrewshire Council	£5,150					1
Falkirk Council	£18,146		2.0		4	17
Fife Council	£38,937	360	1.3	3		14
Glasgow City Council	£25,401	34	7.4	10	291	104
Highland Council	£14,578		4.4			4
Inverclyde Council	£7,795					
Midlothian Council	£5,856		1.0			2
North Ayrshire Council	£21,650		2.5	16		2
North Lanarkshire Council	£13,476	56	1.0	1	56	9
Orkney Islands Council	£418					4

Perth & Kinross Council	£18,528				10	2
Renfrewshire Council	£7,142		3.0		8	82
Scottish Borders Council	£3,672					1
Shetland Islands	£1,624					
South Ayrshire Council	£30,905		0.1			2
South Lanarkshire Council	£22,768	284	10.3	8	72	95
Stirling Council	£3,650		0.2			3
The Moray Council	£9,411					
West Dunbartonshire Council	£3,566		0.1			1
West Lothian Council	£22,964		1.0			18
Western Isles	£1,011					
Associate Members	£5,072					

Appendix 5

Planned Procurement

Frameworks due for renewal or extension by 31 March 2024

Short Contract Title	Schedule Number	End Date of Current Framework
Personal Protective Equipment	0416	31/05/2022
Outdoor Play Equipment and Artificial Surfaces	0215	30/06/2022
Technology Enabled Care	3117	31/12/2022
Library Books & Textbooks	0617	31/07/2022
Fire Safety Products	1617	15/04/2022
Boiler Maintenance	2217	13/09/2022
Trade Materials	0717	31/03/2023
Power Tools	0218	31/03/2023
Asbestos	2418	30/06/2022
Street Lighting Materials	2617	31/07/2022
New Build Residential	1518	31/07/2022
Fresh Meat, Cooked Meats & Fresh Fish	0118	30/09/2022
First Aid Materials	1018	30/09/2022
Commercial Catering Equipment	1118	31/10/2022
Road Signage Materials	1418	30/11/2022
Hot Beverages	1618	13/01/2023
Energy Advice	1718	13/01/2023
Grounds Maintenance Equipment	0918	28/02/2023
Building & Timber	0318	31/03/2023
Secure Care	0219	31/03/2023
Electrical Materials	0919	31/03/2023

Fresh Fruit & Veg	1019	31/03/2023
Children's Residential	0517	30/09/2022
Cleaning Equipment	1818	30/04/2023
Vending Machines	2118	30/04/2023
Groceries & Provisions	1219	30/04/2023
Roadstone	2817	30/06/2022
Salt for Winter Maintenance	2917	30/06/2022
Social Care Agency Workers	2017	31/07/2022
Alcoholic Beverages	0119	31/07/2022
Demolition	1119	31/07/2022
Catering Sundries	1919	31/07/2022
Road Maintenance Materials	3017	31/08/2022
Community Meals	2018	31/08/2022
Washroom Solutions and Sanitary Products	3217	30/09/2022
Fresh Bread, Rolls & Bakery Products	0419	30/09/2022
Plumbing And Heating Materials	2318	30/11/2022
Sheriff Officers	0619	30/11/2022
Vehicle Purchase RM6060	0201	01/12/2022
Vehicle Purchase RM6060 (Leasing)	0201b	01/12/2022
Light and Heavy Plant	0818	28/02/2023
Janitorial Products	1218	28/02/2023
Audio Visual	0618	31/03/2023
Bikeability Scotland Training Providers	0319	31/07/2023
Care Homes For Adults LD Inc Autism	1918	15/09/2023
Security Services and Cash Collection	0719	15/09/2023
Heavy Vehicles	0321	31/12/2023
Domestic Furniture and Furnishings	2019	31/01/2024
Recyclable & Residual Waste	2717	10/02/2024
Recyclable & Residual Waste	2717b	10/02/2024

Bitumen Products	0320	29/02/2024
Care & Support	1318	31/03/2024
Waste Disposal Equipment	1419	31/03/2024
Vehicle Parts	0720	31/03/2024

New Contract Areas

Contract Title	Forecast Delivery date
Personal Protective Equipment (Supported Businesses)	August 2022
National Shared Digital Alarm Receiving Centre	August 2022
Building Construction Consultancy	October 2022
Property Repair, Maintenance and Refurbishment	December 2022

