



SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

Lot 2: Administration of the Royal Mail Statutory Pension Scheme (RMSPS)

SQ Response Deadline - 12 noon on 10/03/22

Selection Questionnaire

Potential Supplier Information and Exclusion Grounds: Part 1 and Part 2.

The Selection Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet one or more of the grounds for exclusion¹. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (referred to as self-cleaning). Failure in respect of any of the Pass/Fail sections detailed below will result in your SQ Response being non-compliant and excluded from the procurement process.

A completed declaration of Part 1 and Part 2 below provides a formal statement that the organisation making the declaration has not breached any of the exclusion grounds. Consequently the Contracting Authority requires all the organisations that you will rely on to meet the selection criteria and to provide a completed Part 1 and Part 2. For example these could be parent companies, affiliates, associates, or essential subcontractors, if they are relied upon to meet the selection criteria. This means that where you are joining in a group of organisations, including joint ventures and partnerships, each organisation in that group must complete one of these self-declarations. subcontractors that you rely on to meet the selection criteria must also complete a self-declaration (although subcontractors that are not relied upon do not need to complete the self-declaration).

When completed, this form is to be returned in accordance with the instructions provided in the Instructions for Selection Stage along with the selection information requested.

Supplier Selection Questions: Part 3

The SQ Instructions for Selection Stage document will provide instructions on the selection questions you need to respond to and how to submit those responses. If you are bidding on behalf of a group (consortium) or you intend to use subcontractors, you should complete all of the selection questions on behalf of the consortium and/or any subcontractors.

If the relevant documentary evidence referred to in the Selection Questionnaire is not provided upon request and without delay the Contracting Authority reserves the right to discontinue your participation in the procurement process.

Consequences of Misrepresentation

If you seriously misrepresent any factual information when completing the Selection Questionnaire, which influences the Contracting Authority to enter into a contract, there may be significant consequences. You may be excluded from the procurement procedure, and from bidding for other contracts for three years. If a contract has been entered into you may be sued for damages and the contract may be rescinded. If fraud, or fraudulent intent, can be proven, you or your responsible officers may be prosecuted and convicted of the offence of fraud by false representation, and you must be excluded from further procurements for five years.

Important notice

1. This Selection Questionnaire (“SQ”) has been issued by the Contracting Authority for use in a competitive procurement conducted in accordance with the Competitive with Negotiation Procedure under the Public Contracts Regulations 2015 (“the Regulations”).

¹ For the list of exclusions please see https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf

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2. This SQ is for use by organisations who are interested in providing the Future Administration of the Royal Mail Statutory Pension Scheme (RMSPS) (the “Contract”), their professional advisers and other parties essential to preparing responses to the SQ and for no other purpose.
3. The Contracting Authority provides this SQ, and any other documentation that it sends to you for this tender process on the basis that they remain the Contracting Authority’s property and you must treat the contents as confidential. If you are unable or unwilling to comply with this you must:
 - 3.1. delete/destroy this SQ and all associated documents at once; and
 - 3.2. not keep any electronic or paper copies and delete/destroy any versions stored on any form of media.
4. This SQ is made available in good faith. The Contracting Authority gives no warranty as to the accuracy or completeness of the information contained in it, and disclaims any liability for any inaccuracy or incompleteness contained in it.
5. The Contracting Authority reserves the right to reject SQs which are not submitted in line with the instructions given.
6. The Contracting Authority reserves the right to cancel the tender process at any point. The Contracting Authority is not liable for any costs resulting from any cancellation of this process or for any costs incurred by an organisation that participates in the tender process.
7. SQs must be completed in the English language.
8. Organisations are deemed to fully understand the processes that the Contracting Authority must follow under relevant UK legislation, particularly the Public Contracts Regulations 2015.

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Notes for completion

1. The “Contracting Authority” refers to the Cabinet Office which is seeking to invite suitable candidates to participate in this procurement process.
2. “You / you” / “Your / your” refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the “Regulations”) and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.
4. The Contracting Authority recognises that arrangements set out in section 1.2 of the standard Selection Questionnaire, in relation to a group of economic operators (for example, a consortium) and/or use of subcontractors, may be subject to change during the procurement process. The lead contact should notify the Contracting Authority immediately of any change in the proposed arrangements and ensure a completed Part 1 and Part 2 is submitted for any new organisation relied on to meet the selection criteria. The Contracting Authority will make a revised assessment of the submission based on the updated information. Information in relation to changes to the use of subcontractors and / or consortium membership will not be considered by the Contracting Authority if submitted after the deadline for receipt of Final Tenders (“**Tender Return Deadline**”).
5. **Part 1 and Part 2 - Every** organisation that is being relied on to meet the selection criteria must complete and submit the Part 1 **and** Part 2 of this self-declaration.
6. All subcontractors are required to complete Part 1 and Part 2².
7. **Part 3** - If you are bidding on behalf of a group, for example, a consortium, or you intend to use subcontractors, you should complete all of the questions on behalf of the consortium and/ or any subcontractors, providing one composite response and declaration.
8. The Contracting Authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact (including those named in response to Question 6.1), other than to the Cabinet Office and/or contracting authorities defined by the Regulations, or pursuant to an order of the court or demand made by any competent authority or body where the Contracting Authority is under a legal or regulatory obligation to make such a disclosure.

² See PCR 2015 Regulations 71 (8)-(9)

Part 1: Potential Supplier Information

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

| Section 1 Potential Supplier Information | | |
|--|---|---|
| Question number | Question | Response |
| 1.1(a) | Full name of the potential supplier submitting the information | |
| 1.1(b) – (i) | Registered office address (if applicable) | |
| 1.1(b) – (ii) | Registered website address (if applicable) | |
| 1.1(c) | Trading status a) public limited company b) limited company c) limited liability partnership d) other partnership e) sole trader f) third sector g) other (please specify your trading status) | |
| 1.1(d) | Date of registration in country of origin | |
| 1.1(e) | Company registration number (if applicable) | |
| 1.1(f) | Charity registration number (if applicable) | |
| 1.1(g) | Head office DUNS number (if applicable) | |
| 1.1(h) | Registered VAT number | |
| 1.1(i) - (i) | If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established? | Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> |
| 1.1(i) - (ii) | If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s). | |
| 1.1(j) - (i) | Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 1.1(j) - (ii) | If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this. | |
| 1.1(k) | Trading name(s) that will be used if successful in this procurement | |
| 1.1(l) | Relevant classifications (state whether you fall within one of these, and if so which one) | |

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|--------|--|---|
| | <p>a) Voluntary Community Social Enterprise (VCSE) b) Sheltered Workshop c) Public service mutual</p> | |
| 1.1(m) | Are you a Small, Medium or Micro Enterprise (SME) ³ ? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 1.1(n) | <p>Details of Persons of Significant Control (PSC), where appropriate: ⁴</p> <ul style="list-style-type: none"> - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met; <ul style="list-style-type: none"> - Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more. <p>(Please enter N/A if not applicable)</p> | |
| 1.1(o) | <p>Details of immediate parent company:</p> <ul style="list-style-type: none"> - Full name of the immediate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) <p>(Please enter N/A if not applicable)</p> | |
| 1.1(p) | <p>Details of ultimate parent company:</p> <ul style="list-style-type: none"> - Full name of the ultimate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) <p>(Please enter N/A if not applicable)</p> | |

Please note: A criminal record check for relevant convictions may be undertaken for the preferred supplier(s) and the persons of significant in control of them.

Please provide the following information about your approach to this procurement:

³<https://www.gov.uk/government/publications/life-of-a-company-annual-requirements/life-of-a-company-part-1-accounts>

⁴ UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. [See PSC guidance.](#)

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| Section 1 | | Bidding model | | | | | |
|------------------|---|---|--|--|--|--|--|
| Question number | Question | Response | | | | | |
| 1.2(a) - (i) | Are you bidding as the lead contact for a group of economic operators? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please provide details listed in questions 1.2(a) (ii), (a) (iii) and to 1.2(b) (i), (b) (ii), 1.3, Section 2 and 3. If no, and you are a supporting bidder please provide the name of your group at 1.2(a) (ii) for reference purposes, and complete 1.3, Section 2 and 3. | | | | | |
| 1.2(a) - (ii) | Name of group of economic operators (if applicable) | | | | | | |
| 1.2(a) - (iii) | Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure. | | | | | | |
| 1.2(b) - (i) | Are you or, if applicable, the group of economic operators proposing to use subcontractors? | Yes <input type="checkbox"/> No <input type="checkbox"/> | | | | | |
| 1.2(b) - (ii) | If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well. | | | | | | |
| | Name | | | | | | |
| | Registered address | | | | | | |
| | Trading status | | | | | | |
| | Company registration number | | | | | | |
| | Head Office DUNS number (if applicable) | | | | | | |
| | Registered VAT number | | | | | | |
| | Type of organisation | | | | | | |
| | SME (Yes/No) | | | | | | |
| | The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables | | | | | | |
| | The approximate % of contractual obligations assigned to each sub-contractor | | | | | | |

Contact details and declaration

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I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.

I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement.

I understand that the Contracting Authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

I am aware of the consequences of serious misrepresentation.

| Section 1 | Contact Details and Declaration | |
|------------------|--|----------|
| Question number | Question | Response |
| 1.3(a) | Contact name | |
| 1.3(b) | Name of organisation | |
| 1.3(c) | Role in organisation | |
| 1.3(d) | Phone number | |
| 1.3(e) | E-mail address | |
| 1.3(f) | Postal address | |
| 1.3(g) | Signature (electronic is acceptable) | |
| 1.3(h) | Date | |

Part 2: Exclusion Grounds

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

| Section 2 | Grounds for Mandatory Exclusion | |
|-----------------|---|--|
| Question number | Question | Response |
| 2.1(a) | <p>Regulations 57(1) and (2) The detailed grounds for mandatory exclusion of an organisation are set out on this webpage, which should be referred to before completing these questions.</p> <p>Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the webpage.</p> | |
| | Participation in a criminal organisation. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| | Corruption. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| | Fraud. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| | Terrorist offences or offences linked to terrorist activities | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| | Money laundering or terrorist financing | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| | Child labour and other forms of trafficking in human beings | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b) |
| 2.1(b) | If you have answered yes to question 2.1(a), please provide further details. Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction, Identity of who has been convicted If the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents. | |
| 2.2 | If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self-Cleaning) | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 2.3(a) | Regulation 57(3) | Yes <input type="checkbox"/> |

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| | <p>Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?</p> | <p>No <input type="checkbox"/></p> |
| <p>2.3(b)</p> | <p>If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.</p> | |

Please Note: The Contracting Authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

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| Section 3 | | Grounds for Discretionary Exclusion |
|------------------|--|---|
| Question number | Question | Response |
| 3.1 | <p>Regulation 57 (8)</p> <p>The detailed grounds for discretionary exclusion of an organisation are set out on this webpage, which should be referred to before completing these questions.</p> <p>Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation.</p> | |
| 3.1(a) | Breach of environmental obligations? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1 (b) | Breach of social obligations? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1 (c) | Breach of labour law obligations? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(d) | Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation’s assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(e) | Guilty of grave professional misconduct? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(f) | Entered into agreements with other economic operators aimed at distorting competition? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(g) | Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(h) | Been involved in the preparation of the procurement procedure? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |
| 3.1(i) | Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2 |

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| 3.1(j) | Please answer the following statements | |
| 3.1(j) - (i) | The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2 |
| 3.1(j) - (ii) | The organisation has withheld such information. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2 |
| 3.1(j) –(iii) | The organisation is not able to submit supporting documents required under Regulation 59 of the Public Contracts Regulations 2015. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2 |
| 3.1(j)-(iv) | The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award. | Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2 |

| | | |
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| 3.2 | If you have answered Yes to any of the above, explain what measures have been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self-Cleaning) | |
|-----|--|--|

Part 3: Selection Questions

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| <p>Section 4: Economic and Financial Standing Suppliers (and Contract Guarantors if applicable) are required to provide financial information by completing <i>SQ Schedule 5: Financial Viability Risk Assessment Tool</i>.</p> <p>Where a Supplier indicates that it intends to rely on the economic and financial standing of a Contract Guarantor then it must ensure that such Contract Guarantor completes the Financial Viability Risk Assessment Tool (“FVRAT”) instead.</p> <p>Further details on completing this section and <i>SQ Schedule 5: Financial Viability Risk Assessment Tool</i> can be found in <i>Section 14 of the SQ Instructions for Selection Stage – Future Services Lot 2: RMSPS</i>.</p> | | |
| Question number | Question | Response |

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| 4.1 | <p>Are you able to provide a copy of your audited accounts for the last three years, if requested?</p> <p>If yes please go directly to question 4.2</p> <p>If no, can you provide one of the following:</p> <p>(answer with Y/N in the relevant box).</p> | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| | (a) A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/ Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| | (b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| | (c) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| | | |
| 4.2 (a) | <p>Please complete the <i>SQ Schedule 5: Financial Viability Risk Assessment Tool</i>.</p> <p>Completion instructions can be found on the “Supplier’s instructions” tab of the FVRAT.</p> <p>Please Note:</p> <p>Where the potential supplier is not the ultimate parent in a group structure, financial information should be provided in the FVRAT for immediate and ultimate parent companies as well as for the potential supplier. Where the potential supplier is the holding company of a group and prepares consolidated financial statements, the consolidated figures should be used.</p> <p>Where the potential supplier is a Lead Supplier for a consortium, separate financial information for other economic operators in the consortium should be provided in the FVRAT where it is proposed they will be assigned responsibility to deliver services worth 10% or more of the total contract value as well as for the potential supplier.</p> <p>Where the potential supplier proposes to sub-contract part of the Contract, separate financial information for subcontractors should be provided in the FVRAT where it is proposed they will be assigned responsibility to deliver services worth 10% or more of the total contract value.</p> | |

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| 4.2 (b) | Has the FVRAT calculated one or more red/amber-rated metrics? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 4.2 (c) | <p>If yes, please provide supporting statements for identified red/amber metrics.</p> <p>Supporting statements should be provided within the FVRAT document for each red and amber rated metric (tabs 3.1 to 3.6) and should contain a maximum of 300 words per supporting statement.</p> <p>Please confirm that the required document(s) has been provided.</p> <p>Supporting statements should be provided for all red/amber rated metrics. This includes those calculated by the FVRAT based on the financial information provided over two financial years for:</p> <ul style="list-style-type: none"> ● the Lead Supplier; and ● ultimate and immediate parents of the Lead Supplier where the potential supplier is not the ultimate parent in a group structure; and ● subcontractors where it is proposed they will be assigned responsibility to deliver services worth 10% or more of the total contract value; and ● economic operators in a consortium where it is proposed they will be assigned responsibility to deliver services worth 10% or more of the total contract value. <p>Where the potential supplier is the holding company of a group and prepares consolidated financial statements, the consolidated figures should be used.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| Section 5 | Group/Consortium Information | |
| | If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below: | |
| Question number | Question | Response |

| | | |
|--|--|--|
| | Name of organisation | |
| | Relationship to the Supplier completing these questions | |

| | | |
|-----|---|---|
| 5.1 | Are you able to provide parent company accounts if requested to at a later stage? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 5.2 | If yes, would the parent company be willing to provide a guarantee if necessary? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 5.3 | If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| Section 6 | Technical and Professional Ability |
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| 6.1 | <p>Relevant Experience and Contract Examples</p> <p>Please provide following details of all Relevant Contracts used as examples in the Section 8 responses, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE):</p> <ul style="list-style-type: none"> • scheme size (including number of members) • scheme complexity and status (including, but not limited to, the number of schemes managed, the diversity of scheme membership, the diversity of the scheme stakeholders, the complexity of rules, the complexity of wider delivery ecosystem and the level of statutory and political scrutiny) • describe the start and end date and duration of the contract. <p>Please note that the responses to questions in Section 8 require reference to the examples given in this Section 6. Examples in this Section 6 are the “Relevant Contracts” referred to in the Section 8 questions. Suppliers should bear this in mind when completing this Section.</p> <p>Contracts should have been performed during the past three years, and Suppliers should provide details of the start, end (if relevant) and duration of these contracts.</p> <p>The named contact provided below should be able to provide written evidence to confirm the accuracy of the information provided below.</p> <p>Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle is to be created for this contract)</p> |
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| | <p>then separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle.</p> <p>Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the main intended provider(s) or sub-contractor(s) who will deliver the contract.</p> |
|--|---|

| | Contract 1 | Contract 2 | Contract 3 |
|---|------------|------------|------------|
| Name of customer organisation | | | |
| Point of contact in the organisation | | | |
| Position in the organisation | | | |
| E-mail address | | | |
| Description of contract | | | |
| Contract Start date | | | |
| Contract completion date | | | |
| Estimated contract value | | | |

| | |
|-------------------|---------------------|
| Section 6a | Supply Chain |
|-------------------|---------------------|

| Question number | Question | Response |
|-----------------|--|---|
| 6.2 | <p>Please confirm if you intend to use a supply chain for this contract. If you answer “No” you do not need to complete the rest of this section.</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6.3 | <p>Please confirm that you have systems in place to ensure that those in your supply chain are paid within your agreed contractual terms.</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6.4 | <p>Please confirm you have procedures for resolving disputed invoices promptly and effectively with those in your supply chain.</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6.5 | <p>For all contracts entered into pursuant to a procurement carried out under the PCR 2015, please confirm you include 30 day payment terms in all of your sub-contracts (and you require your supply chain to do so) on all such contracts.</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |

SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

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| 6.6 | <p>Please provide the percentage of invoices paid by you to those in your immediate supply chain on all contracts within 60 days of the receipt of the invoice in each of the last two six month periods. This should include the percentage of invoices paid within each of the following categories:-</p> <ul style="list-style-type: none"> ● within 30 days ● in 31 to 60 days ● in 61 days or more. <p>Please include the total volume of invoices in each category. It is acceptable to cross refer to information that has previously been submitted or is publicly available (provided it covers the requested period), in which case, please provide details and/or insert link(s):-</p> <p>If you are unable to demonstrate that 95% of invoices payable to your supply chain on all contracts have been paid within 60 days of the receipt of the invoice in each of the last two six month periods, please explain why and if applicable what remedial steps you have taken and/or are planning to take.</p> | <p>Please provide details within this box and refer to any attachments where appropriate.</p> |
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| Section 7 | Modern Slavery Act 2015 |
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| Question number | Question | Response |
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| 7.1 | <p>Are you a relevant commercial organisation as defined by Section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act") this means do you have a total turnover of £36m or more?</p> | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| 7.2 | <p>If you have answered yes to question 7.1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015? www.legislation.gov.uk/ukpga/2015/30/section/54/enacted</p> <p>Please provide the relevant URL</p> | <p>Yes <input type="checkbox"/></p> <p>Please provide the relevant URL below: _____</p> <p>No <input type="checkbox"/></p> |
| | <p>If No please provide an explanation as to why your organisation is not compliant with the annual reporting requirements contained within section 54 of the Act 2015</p> | |

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| Section 8 | Additional Questions |
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SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

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| | Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage. |
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| 8.1 Environmental Management | | |
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| Question number | Question | Response |
| 8.1(a) | <p>Has your organisation been convicted of breaching environmental legislation, or had any notice served upon it, in the last three years by any environmental regulator or authority (including local authority)?</p> <p>If your answer to this question is “Yes”, please provide details in a separate Appendix of the conviction or notice and details of any remedial action or changes you have made as a result of conviction or notices served.</p> <p>The Contracting Authority will not select bidder(s) that have been prosecuted or served notice under environmental legislation in the last 3 years, unless the Contracting Authority is satisfied that appropriate remedial action has been taken to prevent future occurrences/breaches.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.1(b) | If you use subcontractors, do you have processes in place to check whether any of these organisations have been convicted or had a notice served upon them for infringement of environmental legislation? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

| 8.2 Compliance with Equality Legislation (For organisations working outside of the UK please refer to equivalent legislation in the country that you are located). | | |
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| Question number | Question | Response |
| 8.2 (a) | In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.2 (b) | <p>In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds or alleged unlawful discrimination?</p> <p>If you have answered “yes” to either 8.6(a) or 8.6 (b) please provide, as a separate Appendix, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |

SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

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| | <p>If the investigation upheld the complaint against your organisation, please use the Appendix to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the Contracting Authority’s satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.</p> | |
| 8.2 (c) | If you use subcontractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| 8.3 | Health and Safety | |
| Question number | Question | Response |

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| 8.3 (a) | <p>Has your organisation or any of its Executive Officers been in receipt of enforcement/remedial Orders/action in relation to the Health and Safety Executive (or equivalent body) in the last three years?</p> <p>If Yes, please provide details in a separate Appendix of any enforcement/remedial orders/action served and give details of remedial action or changes to procedures you have made as a result.</p> <p>The Contracting Authority will exclude bidder(s) that have been in receipt of enforcement/remedial action/orders unless the bidder(s) can demonstrate to the Contracting Authority’s satisfaction that appropriate remedial action has been taken to prevent future occurrences or breaches.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.3 (b) | <p>Please self-certify that your organisation is an accredited/registered member of a Safety Schemes in Procurement (SSIP) members scheme (e.g. CHAS etc.).</p> <p>If No, please answer questions 8.3 (c) through to 8.3 (f) below.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| | If Yes please state which scheme; | |
| 8.3 (c) | <p>Please self-certify that your organisation has a Health and Safety policy in place that complies with current legislative requirements.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| | <p>If no, is this because your organisation has less than 5 employees?</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.3 (d) | Please self-certify that your organisation has access to competent Health and Safety advice appropriate to the delivery of this contract. | Yes <input type="checkbox"/> No <input type="checkbox"/> |

SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

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| 8.3 (e) | Please self-certify that your organisation has appropriate arrangements in place to adequately comply with Health and Safety and Fire Safety legislation and to identify, control, monitor and review the significant risks associated with the delivery of this contract. | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.3 (f) | Do you have processes in place to check whether any of the above circumstances apply to subcontractors employed by you? If No, is this because you don't use subcontractors? | Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> |

| 8.4 | Data Protection | |
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| Question number | Question | Response |
| 8.4(a) | Please confirm that you have in place, or that you will have in place by contract award, the human and technical resources to perform the contract to ensure compliance with the General Data Protection Regulations and the Data Protection Act 2018 and to ensure the protection of the rights of data subjects. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 8.4(b) | Please provide details of the technical facilities and measures (including systems and processes) you have in place, or will have in place by contract award, to ensure compliance with the General Data Protection Regulation and the Data Protection Act 2018 and to ensure the protection of the rights of data subjects. Your response should include, but should not be limited to facilities and measures: <ul style="list-style-type: none"> ● To ensure ongoing confidentiality, integrity, availability and resilience of processing systems and services; ● To comply with the rights of the data subjects in respect of receiving privacy information, and access, rectification, deletion and portability of personal data; ● To ensure that any consent based processing meets standards of active, informed consent, and that such consents are recorded and auditable; ● To ensure legal safeguards are in place to legitimise transfers of personal data outside the UK (if such transfers will take place); ● To regularly test, assess and evaluate the effectiveness of the above measures. | |

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Please provide details within this box and refer to any attachments where appropriate.

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| 8.5 | Skills and Apprentices | |
| Question number | Question | Response |

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| 8.5 (a) | Public procurement of contracts with a full life value of £10 million and above and duration of 12 months and above should be used to support skills development and delivery of the apprenticeship commitment. This policy is set out in detail in Procurement Policy Note 14/15. Please confirm if you will be supporting apprenticeships and skills development through this contract. | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.5 (b) | If yes, can you provide at a later stage documentary evidence to support your commitment to developing and investing in skills, development and apprenticeships to build a more skilled and productive workforce and reducing the risks of supply constraints and increasing labour cost inflation? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| 8.6 | Project Specific Questions | |
| | <p>Suppliers must provide responses to a series of technical and security questions in the context of the case studies provided in Section 6.1 (“Relevant Contract(s)”)</p> <p>Questions are a mix of pass/fail and scored questions.</p> <p>For a bid to be successful all Pass/Fail questions must respond with a Pass. Suppliers may be asked for evidence to support their Pass response.</p> <p>For scored questions, details of the evaluation criteria can be found in <i>INSTRUCTIONS FOR SELECTION STAGE - FUTURE SERVICES LOT 2 RMSPS</i></p> <p>Note: For each scored question there is a 2 page limit per response. Further details including consequences for exceeding this page limit are set out in paragraph 7 SQ (Response Requirements) the Instructions for Selection Stage.</p> | |

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| Technical Questions | | |
| In the context of these case studies provided in Section 6.1 please provide responses to the following Technical Questions. | | |
| Question number | Question | Response |

SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

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| <p>8.6 (a)</p> | <p>Resource Management Please provide details of how the Supplier (or consortium (JV) members or material subcontractors if applicable) attracted, retained and developed staff who worked on the Relevant Contract(s) cited in section 6.1</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Ensured staff capacity and capability met delivery needs. ● Grew the delivery team at pace when required. ● Ensured up-to -date staff capability. ● Maintained staff wellbeing and satisfaction. <p><i>This question is scored</i></p> | |
| <p>8.6 (b)</p> | <p>Multi-Party Stakeholder Relationships In relation to the Relevant Contract(s) cited in section 6.1 please provide details how the Supplier (or consortium (JV) members or material subcontractors if applicable) successfully managed multiple stakeholders, such as members, employers and associated organisations.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Their approach on how stakeholders were identified and how plans reflected levels of engagement. ● How stakeholder engagement was prioritised and managed throughout the contract. ● How feedback mechanisms were established with stakeholders to understand issues/challenges and aligned plans with outputs. ● Their approach to securing a wider understanding of stakeholder landscape, to ensure all engagement was aligned to other relevant factors impacting stakeholder groups. <p><i>This question is scored</i></p> | |
| <p>8.6 (c)</p> | <p>Innovation and Digitisation In relation to the Relevant Contract(s) cited in section 6.1 please provide details of how the Supplier (or consortium (JV) members or material subcontractors if applicable) approached introducing innovation and digitisation into a service.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Identify opportunities to innovate/digitise and how the solution is derived through discovery work, prototyping and user engagement. ● Apply innovation throughout any area of the business, including communications and engagement or integration with the wider business, as well as data and the use of digital platforms. | |

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| | <ul style="list-style-type: none"> ● Ensure all clients benefit from innovation innovation and improved digitisation, and how proprietary solutions with a limited lifespan are avoided. ● Make use of market leading products and stay updated with new technological advancements and releases as they become available. <p><i>This question is scored</i></p> | |
| 8.6 (d) | <p>Knowledge Management (Transfer) In relation to the Relevant Contract(s) cited in section 6.1 please provide details of how the Supplier (or consortium (JV) members or material subcontractors if applicable) approached knowledge transfer from an incumbent service provider.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Have actively sought out detailed knowledge from the incumbent and other sources, including the client and online resources. ● What has worked effectively when it comes to knowledge transfer and what has been less successful. ● Used technology or other methods for collecting and storing information that can be indexed and used across the service provision. ● Prioritised knowledge transfer from particular areas of the service to facilitate the successful delivery from one supplier to the next. <p><i>This question is scored</i></p> | |
| 8.6 (e) | <p>Transition In relation to the Relevant Contract(s) cited in section 6.1 please provide details of how the Supplier (or consortium (JV) members or material subcontractors if applicable) approached a previous pension scheme transition.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Planned the transition and organised themselves into an effective project team incorporating a range of project and business professionals through a programme of workstreams to meet clearly articulated delivery milestones. ● Prioritised each functional area, including, but not limited to, payroll, calculation configuration, workflow management and data interfaces. ● Worked with the client to ensure a continuous dialogue was maintained throughout the programme and clear reporting provided visibility at all stages. <p><i>This question is scored</i></p> | |
| 8.6 (f) | Issue Management | |

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| | <p>In relation to the Relevant Contract(s) cited in section 6.1 and following on from the answer provided to question 8.6 (e) please provide details of how the Suppliers (or consortium (JV) members or material subcontractors if applicable)) approached risk and issue management within the transition.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Established risk management protocols, including the use of registers and escalation routes, and how they may have kept the client updated on issues as they arose. ● Resolved an example of a risk that became an issue, including what lessons were learned from the experience and how any conflict was resolved. <p><i>This question is scored</i></p> | |
| 8.6 (g) | <p>Data Migration</p> <p>In relation to the Relevant Contract(s) cited in section 6.1 please provide details of how the Supplier or consortium (JV) members or material subcontractors if applicable) approached data migration within the transition.</p> <p>The response should include how they:</p> <ul style="list-style-type: none"> ● Established the volume, scope, type and source of data from the incumbent service provider. ● Approached the data migration in terms of resource allocation and whether the migration was a single migration or phased over the transition period. ● Addressed data quality issues that were identified and handled, either by the incumbent service provider or the Supplier. ● Carry out testing including any data reconciliation. ● Establish data quality targets and monitor data quality throughout the migration process. <p><i>This question is scored</i></p> | |
| <p>Security Questions</p> <p>In relation to the services being requested as outlined in SQ - SCHEDULE 2 – SERVICES OVERVIEW, please tell us if you are willing to comply with the following Security requirements</p> | | |
| Question number | Question | Response |
| 8.6 (h) | <p>Are you certified to, or are willing to obtain by contract award, ISO 27001:2013 Certification by a UKAS approved certification body.?</p> <p>Do you hold a current and valid Cyber Essentials Plus certificate which has been awarded by one of the government approved Cyber Essentials accreditation bodies or commit to obtaining certification by contract award.?</p> | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |

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| | Both certifications must be relevant to the solution provided for delivering this service. <i>This question is a Pass/Fail</i> | |
| 8.6 (i) | Where subcontractors are used and are involved in handling sensitive and personal information does the Supplier ensure that ISO 27001:2013 Certification and contractual security requirements flow down to the subcontractors before any live member data is transferred into the Supplier's systems. If this does not currently occur, do you commit to this should you be successful in this procurement? <i>This question is a Pass/Fail</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8.6 (j) | Please provide details of how software development or configuration management progresses from test to live environments. Evidence should include a diagram of the software development life cycle (SDLC), quality assurance testing at each stage, segregation of roles and how data is secured during testing. <i>This question is scored</i> | |
| 8.6 (k) | Do you have a dedicated security/cyber security specialist resources, or commit obtaining such resources, who perform a full information security risk assessment and produce the associated and contract-controlled risk management documentation detailing the security controls in place. <i>This question is a Pass/Fail</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| Section 9 | Non-Disclosure Agreement |
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| 9 | Have you previously signed a Non-Disclosure Agreement related to this procurement, and reflects the legal entity completing this SQ, and submitted this to the Authority? If your answer is "No", have you uploaded a completed Non-Disclosure Agreement in the format set out in Schedule 4? | Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> |
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| Section 10 | Carbon Reduction Public procurement of contracts with a full life value of £5,000,000.00 and above should take into account suppliers' carbon reduction plans and |
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SCHEDULE 1– STAGE 1: SELECTION QUESTIONNAIRE

| | <p>commitment to Net Zero by 2050. This Policy is set out in detail in Policy Procurement Note 06/21.</p> <p>https://www.gov.uk/government/publications/procurement-policy-note-0621-taking-account-of-carbon-reduction-plans-in-the-procurement-of-major-government-contracts</p> <p>The requirement is that you will have in place and provide a link to your Carbon Reduction Plan published to your website (using the template provided within the PPN) confirming your commitment to achieving Net Zero by 2050 in the UK, and setting out the environmental management measures that you have in place and which will be in effect and utilised during the performance of the contract.</p> <p>*If you are a new supplier and have been trading for less than 12 months, you must still confirm your commitment to achieving Net Zero by 2050 by publishing a full Carbon Reduction Plan (CRP) as soon as possible.</p> <p>*If you do not have a website where you can evidence a published Carbon Reduction Plan containing the minimum required information as per the PPN guidance, you must provide an electronic copy of your Carbon Reduction Plan to CCS containing the minimum required information (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/991623/Guidance_on_adopting_and_applying_PPN_06_21_Selection_Criteria_3.pdf)</p> | |
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| Question number | Question | Response |
| 10.1 | Are you a new supplier and have been trading for less than 12 months? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <p>Questions 10.2 to 10.5 are evaluated PASS/FAIL.</p> <p>PASS =</p> <p>Carbon Reduction Plan submitted and/or published to your website which;</p> <ul style="list-style-type: none"> ● confirms the supplier’s commitment to achieving Net Zero by 2050, ● contains emissions for the sources included in Scope 1 and 2 of the GHG Protocol, and a defined subset of Scope 3 emissions, OR not reported for any Scopes or only for some Scopes, but you have provided an acceptable explanation why at question 1.30.5 ● sets out the environmental management measures in effect, including certification schemes or specific carbon reduction measures you have adopted, and that you will be able to apply when performing the contract ● reporting period is less that 12 months from the date of commencement of the procurement, OR <p>reporting period is more than 12 months from the date of commencement of the procurement, but you have provided an acceptable explanation why at question 1.30.5</p> <ul style="list-style-type: none"> ● is published on your website or If you do not have a website, you have provided an electronic copy of your Carbon Reduction Plan to CCS and you confirm that you will provide a copy of the Carbon Reduction Plan in writing to anyone who requests one within 30 days in future. ● has been signed off by a director (or equivalent) or designated member (for LLPs). | | |
| 10.2 | <p>Please confirm that you have detailed your environmental management measures by completing a Carbon Reduction Plan which meets the required reporting standard</p> <p>Your bid will fail if you do not select Yes to this question.</p> | Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| 10.3 | <p>Upload an attachment containing a link to your most recently published Carbon Reduction Plan here or If you do not have a website, you must attach a copy of your Carbon Reduction Plan to this question and confirm that you are willing to provide your plan upon request to Buyers under the framework who may request it in future within 30 days of the request being made.</p> <p>As detailed in the evaluation guidance, if you are unable to report emissions in the Carbon Reduction Plan for any Scopes or only for some Scopes, or if the reporting period is more than 12 months from the date of commencement of the procurement, you must provide an acceptable explanation as to why in question 10.4</p> | The applicable attachment must be uploaded |
| 10.4 | <p>If in question 10.3, you are unable to report emissions in the Carbon Reduction Plan for any Scopes or only for some Scopes, or if the reporting period is more than 12 months from the date of commencement of the procurement, you must provide an acceptable explanation as to why at this question and provide a copy of your draft plan at question 10.3.</p> <p>Enter N/A if you were able to provide the above in question 10.3.</p> | |
| 10.5 | <p>Please confirm that your organisation is taking steps to reduce your GHG Emissions over time and is publicly committed to achieving Net Zero by 2050</p> <p>Your bid will fail if you do not select Yes to this question.</p> | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| <p>Questions 10.6 to 10.11 are for information only.</p> <p>You are required to provide the below data from your Carbon Reduction Plan.</p> | | |
| 10.6 | Baseline Year Scope 1 - Text in tCO2e | |
| 10.7 | Baseline Year Scope 2 - Text in tCO2e | |
| 10.8 | Baseline Year Scope 3 - Text in tCO2e | |
| 10.9 | Reporting Year Scope 1 - Text in tCO2e | |
| 10.10 | Reporting Year Scope 2 - Text in tCO2e | |
| 10.11 | Reporting Year Scope 3 - Text in tCO2e | |
| <p>Question 10.12 is evaluated PASS/FAIL. Your bid will fail if you do not answer yes to this question.</p> | | |
| 10.12 | <p>Do you confirm your commitment to achieving Net Zero by 2050 and commit to publishing a full Carbon Reduction Plan (CRP) on your website as soon as possible.</p> | <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| 10.13 | <p>Please confirm the date by which you will be able to provide a full Carbon Reduction Plan.</p> | Enter a valid Date |