

# Applying Equality, Diversity, and Inclusion in the supply chain

## Supply chain advice pack

December 2025

Funded by:



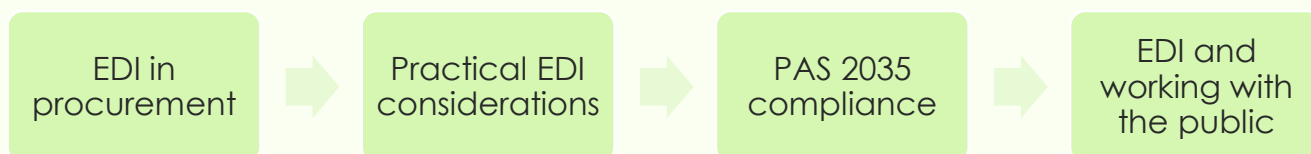
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# Overview

## About this pack

This pack provides practical guidance on embedding Equality, Diversity, and Inclusion (EDI) principles into procurement processes within retrofit projects. Procurement is a powerful lever for driving social value and creating inclusive supply chains. By adopting fair and transparent practices, organisations can ensure that suppliers reflect their EDI commitments and contribute to wider community benefits. PAS 2035 is a key retrofit standard, often used on grant funded schemes and working well with the public is essential for all retrofit projects.



## EDI in procurement

Procurement is a critical area where EDI can be embedded to drive meaningful change across the retrofit supply chain. Inclusive procurement practices involve engaging a diverse range of suppliers, supporting SMEs, and ensuring that all contractors align with the organisation's EDI values.

## Relevant legislations

### Public Contracts Regulations (PCR) 2015

- Establishes principles of fairness, transparency, and non-discrimination in public procurement.
- Encourages SME participation by requiring contracts to be divided into lots where appropriate and prohibiting excessive turnover requirements (cannot exceed twice the contract value).
- Mandates equal treatment of suppliers and clear, accessible tender documentation.

### Procurement Act 2023 & Procurement Regulations 2024

- Introduces a simpler, more flexible regime while embedding transparency and accountability.
- Requires contracting authorities to consider social value and inclusion objectives in procurement planning.
- Strengthens obligations for supplier diversity, including reserving contracts for supported employment providers and public service mutuals.

- Imposes publication and KPI requirements to monitor performance and compliance with equality objectives.

### Government SME target:


- The UK government aims for £1 in every £3 of public procurement to go to SMEs, supported by Procurement Policy Notes (PPN) and the National Procurement Policy Statement.

### How to embed EDI in procurement:

- Include EDI questions in tenders and assign meaningful weighting.
- Request suppliers to sign up to EDI commitments and demonstrate inclusive recruitment and training practices.
- Evaluate supplier's approaches to social value delivery, including local employment and SME.
- Partner with community organisations and EDI networks to bring underrepresented groups into the supply chain.
- Provide CPD-accredited EDI training for contractors and suppliers to ensure inclusive delivery.
- Funding streams linked to green jobs and the levelling up agenda can support SMEs in gaining PAS 2030 accreditation, enabling them to deliver retrofit works on government-funded schemes. This strengthens the local supply chain and ensures projects reflect the community they serve.
- Implement systems to monitor and verify delivery against the EDI commitments outlined in the tender.

## Practical internal EDI considerations

- **Strategy alignment:** Implementing EDI requires a strategic, systematic approach that spans all areas of an organisation's operations. The first step is to establish clear EDI goals that are aligned with broader organisational strategies and project outcomes. These goals should be specific, measurable, and focused on areas where the organisation can make the greatest impact.
- **EDI maturity assessments:** Organisations can use tools such as the [RISE EDI Maturity Assessment Tool](#) to baseline their current capabilities and identify areas for improvement. This assessment covers key themes including governance, resident engagement, project selection, procurement, workplaces, and data handling.
- **Senior buy-in:** Leadership commitment is essential for driving cultural change. Senior leaders must actively promote EDI, allocate resources, and model inclusive behaviours. Designating EDI champions within teams helps sustain momentum and ensures accountability.
- **Recruitment practices:** should be designed to attract and retain diverse talent. This includes targeted outreach, inclusive job descriptions, and partnerships with community organisations. Mentoring, apprenticeships, and alternative pathways



to qualifications can help individuals from less affluent backgrounds enter the sector.

- **Staff training:** is a cornerstone of EDI implementation. Organisations should offer CPD-accredited EDI training to retrofit teams, contractors, and resident liaison officers. Training should be accessible, considering timing, location, and learning needs. Providing opportunities for feedback and continuous learning helps build a culture of inclusion and respect.
- **Equality Impact Assessments (EIA):** An EIA evaluates how proposed actions may affect different groups, ensuring decisions are fair, inclusive, and compliant with the Equality Act 2010. This proactive approach reduces risk, improves outcomes for staff and residents, and demonstrates a genuine commitment to equality and diversity. Conducting an Equality Impact Assessment (EIA) helps organisations identify and address potential inequalities before implementing new policies, projects, or workplace changes.
- **Monitoring and reporting:** is critical for tracking progress and driving continuous improvement. Organisations can collect and analyse EDI data, including workforce diversity and supplier inclusivity. Transparent reporting on EDI achievements, including success stories and lessons learned, enhances accountability and demonstrates a genuine commitment to inclusive practice.

#### **Practical ways to do this:**

- Anonymous annual staff survey to measure perceptions of inclusion and identify areas for improvement.
- EDI dashboards tracking workforce demographics, recruitment data, and supplier diversity metrics.
- Quarterly progress reports shared internally and externally to show actions taken and outcomes achieved.
- Supplier audits to review compliance with EDI commitments in contracts.
- Feedback loops such as focus groups or resident engagement sessions to capture lived experiences.
- Public reporting on social value and EDI outcomes in annual sustainability or impact reports.

## PAS 2035 considerations

The **PAS 2035:2023** standard includes clause 12.1.3, which requires that all retrofit advice be delivered in a form that can be understood by the occupants. This means considering language barriers, age, hearing or sight difficulties, and cognitive needs. Compliance with this clause ensures that retrofit advice is inclusive and effective.

You should consider how this will be achieved when working on your retrofit project.

## Implementing EDI when working with the public

Embedding EDI in public-facing retrofit delivery ensures projects are inclusive, accessible, and responsive to diverse community needs. Engagement should reflect population diversity and use clear, culturally sensitive communication.

### Key actions:

- Align engagement plans with your EDI strategy and regulatory requirements.
- Provide EDI training for staff and contractors.
- Collect and analyse demographic data to tailor engagement.
- Offer feedback opportunities during design and handover stages.
- Train and employ local residents or trusted community members to build trust.
- Complying with PAS 2035, PAS requires resident advice to “be delivered in a form that can be understood by the occupants. This means considering language barriers, age, hearing or sight difficulties, and cognitive needs. Compliance with this clause ensures that retrofit advice is inclusive and effective” (PAS 1035:2023. The box below gives some suggestions on how that can be implemented.

### Practical considerations







To make engagement truly inclusive, organisations should anticipate and accommodate diverse needs. Consider these steps:

- **Working patterns:** Offer evening/weekend appointments.
- **Religious periods:** Avoid scheduling during major observances.
- **Medical conditions:** Provide alternative solutions (e.g., temporary heating, accessible routes).
- **Language barriers:** Use translators and translated materials.
- **Accessibility:** Offer large-print, audio, and braille formats.

## Conclusion

- Embed EDI at every stage of procurement to create fair, transparent processes that strengthen local supply chains and deliver social value.
- Align with legislation and policy drivers such as the Public Contract Regulations 2015 and the Procurement Act 2023 to ensure compliance and accountability.
- Use practical tools and monitoring systems to track supplier diversity, workforce inclusion, and progress against EDI commitments.
- Integrate EDI into wider organisational strategies – from recruitment and training to public engagement – to ensure retrofit projects reflect and respect the communities they serve.

## Resources

	<b>Podcast:</b> All RISE podcasts are available <a href="#">here</a> .	<b>Apprenticeship podcast:</b> “Apprenticeships in retrofit with Warmworks” available <a href="#">here</a> .	
	<b>Masterclass:</b> All RISE masterclasses are available <a href="#">here</a> .	<b>Apprenticeship masterclass</b> “Green Skills and teams for your project” available <a href="#">here</a> .	
	<b>Advice pack:</b> All RISE advice packs available <a href="#">here</a> .	<b>Apprenticeship advice pack:</b> “Apprenticeships in retrofit for the supply chain” available <a href="#">here</a> .	

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