



Data Retention Policy 2026

1. Purpose

The purpose of this policy is to set out how Roman Electrical LTD. ("the Company") manages the retention, storage, and disposal of personal data and business records in line with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and relevant industry regulations.

As an electrical contractor, the Company handles personal data relating to customers, employees, subcontractors, and suppliers. This policy ensures that data is kept only as long as necessary and securely destroyed once it is no longer required.

2. Scope

This policy applies to:

- All staff, contractors, and third parties who handle personal data on behalf of the Company.
 - All records held electronically (emails, databases, cloud systems) and physically (paper files, job sheets, invoices, certificates).
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3. Principles

In accordance with the UK GDPR's storage limitation principle, the Company will:

- Retain personal data only for as long as necessary for the purposes it was collected.
 - Periodically review the need to retain specific records.
 - Securely delete or destroy personal data once it is no longer required.
 - Maintain accurate records of retention and destruction activities.
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4. Retention Schedule

The following table outlines how long different types of data are retained by the Company:

Category of Data	Examples	Retention Period	Legal / Business Basis
Customer Records	Contact details, job sheets, invoices, service history, certificates, electrical installation reports	7 years after last job completion	Required for tax, warranty, and contract reference purposes
Quotes & Estimates	Job quotations, correspondence	2 years (if not converted to a job)	Legitimate business interest
Financial Records	Invoices, receipts, VAT returns, payroll records	7 years	HMRC and Companies Act 2006
Employee Records	Personal details, contracts, right-to-work documents, payroll, training and certification records	6 years after employment ends	Employment law; potential claims limitation
Subcontractor Records	Contact details, insurance, certifications, payment details	6 years after last engagement	Legal and business requirement
Health & Safety Records	Risk assessments, accident reports, site inspection records	3 years (or 40 years if related to hazardous exposure)	Health & Safety Executive (HSE) requirements
Training and Competency	Qualifications, trade certificates (e.g., NICEIC, ECS)	Duration of employment + 6	Verification and compliance

Category of Data	Examples	Retention Period	Legal / Business Basis
Records	cards)	years	
Supplier Records	Contact details, contracts, purchase orders	6 years after end of contract	Contractual and audit requirement
Marketing Data	Email lists, consent forms	Until consent withdrawn or 2 years after last contact	Consent basis under GDPR
CCTV or Security Footage (if applicable)	Recorded footage from premises	30 days (unless required for investigation)	Security and legitimate interest

5. Secure Disposal

When data reaches the end of its retention period, it will be securely destroyed using appropriate methods:

- Paper records: cross-cut shredding or certified confidential waste disposal service.
- Electronic records: permanent deletion from systems, including backups and cloud storage.
- Devices: secure wiping of hard drives and memory cards before disposal.

A Data Destruction Log will be maintained to evidence compliance.

6. Archiving

Data that must be retained for legal or regulatory purposes but is no longer in active use will be archived securely with restricted access.

Archived data will be reviewed periodically to confirm it remains necessary.

7. Responsibilities

- Data Protection Officer / Responsible Person: [Insert name/contact]
 - o Oversees implementation and compliance with this policy.
 - o Ensures staff are aware of retention obligations.
 - All Employees and Subcontractors:
 - o Must adhere to this policy when handling records.
 - o Report any discrepancies or suspected breaches.
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8. Policy Review

This policy will be reviewed annually or sooner if:

- Legal or regulatory requirements change,
 - There is a change in business operations or data processing, or
 - A data breach or audit identifies improvements.
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9. Breach of Policy

Failure to comply with this policy may result in disciplinary action and could expose the Company **to legal or financial penalties.**

Signed: **Sebastian Botiz**

Roman Electrical LTD

Director

January 2026