

**Business eCargo Bike research project  
2020/21**  
Guidance and Information for Applicants

## Disclaimer

Applicants should be aware that, as the Business eCargo Bike research project 2020/21 is a developing programme, the submission process will be reviewed as the programme evolves and therefore may be subject to change. The Scottish Ministers and Transport Scotland reserve the right to amend the published guidance during the period of the programme.

Energy Saving Trust and/or Transport Scotland reserves the right to reject a submission where:

- a submission is completed incorrectly, is materially incomplete or fails to meet any submission requirements which have been notified to the applicant; and/or
- the applicant (including any partners) are guilty of a material misrepresentation or false statement in relation to its submission and/or the submission process.

Energy Saving Trust and/or Transport Scotland reserve the right at any time:

- not to consider submissions other than those submitted in accordance with the requirements of the required process;
- to issue amendments or modifications to the submission documents during the process;
- to require an applicant (including any partners) to clarify their application in writing and/or provide additional information (failure to respond adequately may result in an application being rejected);
- alter the timetable of any aspect of the process;
- to not award any ecargo bikes under the Business eCargo Bike research project 2020/21; and/or
- to cancel the research project process at any time.

Any costs or expenses incurred by an applicant (including any partners) or any other person in participating in the process will not be reimbursed by Energy Saving Trust and/or Transport Scotland. Energy Saving Trust, Transport Scotland and/or any of their representatives or advisors will not be liable in any way to any applicant (including any partners) or any other person for any costs, expenses or losses incurred by any applicant (including any partners) or any other person in connection with this application process.

## Background

EST is offering businesses the chance to have a free trial of an ecargo bike for a 12-month period. The eCargo bike should ideally replace the use of an ICE vehicle currently being used, however EST will consider business that demonstrate a good case for an ecargo bike to enhance their business needs and lower their emissions. EST will be the owner of the ecargo bike but the successful businesses gaining a free trial will be responsible for the insurance, public liability, maintenance and secure storage of the ecargo bike.

## About this document

This document provides an overview and guidance to help you complete an application for the Business eCargo Bike research project.

This document is one of two you will need in order to complete an application:

1. **Business eCargo Bike research project 2020/21 Application Form** - *(available on our website <https://energysavingtrust.org.uk/scotland/grants-loans/ebike-grant-fund>)*
2. **Business eCargo Bike research project Guidance and Information for Applicants** – *(this document)*

For any questions during the application process, please contact EST: [eBikeGrantsScot@est.org.uk](mailto:eBikeGrantsScot@est.org.uk) or contact 0131 555 8642.

The fund will remain open until all 10 ecargo bikes have been allocated. With 10 ecargo bikes to offer on long term trials, applications will be assessed as they are received, each applicant will be informed the outcome of their application. Once all 10 ecargo bikes have been allocated the fund will close.

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## Introduction to Business eCargo Bike research project

The Business eCargo Bike research project is for businesses and organisations in Scotland to have a long term free trial of an eCargo bike for 12 months, offering a sustainable transport solution for business use and deliveries, generating zero emissions and contributing to improved air quality.

In return, the successful businesses must provide Energy Saving Trust with data, reporting and feedback on how effective the eCargo bike is for this purpose. This is part of a research project, so that Energy Saving Trust and Transport Scotland can gain insight into how businesses across Scotland might use ecargo bikes in the future.

The Strategic aims of the Business eCargo Bike research project is to encourage businesses to realise the benefits of an ecargo bike, to support sustainable active business travel as an alternative to car and van use.

## Policy context of the Business eCargo Bike research project

### ***The national policy framework***

The Scottish Government's overarching '*Purpose*' is focussed upon '*creating a more successful country with opportunities for all to flourish, through increasing sustainable economic growth*'. The *National Transport Strategy* (updated by the refresh published in January 2016) contributes to this, establishing a vision of: '*An accessible Scotland with safe, integrated and reliable transport that supports economic growth, provides opportunities for all and is easy to use; a transport system that meets everyone's needs, respects our environment and contributes to health; services recognised internationally for quality, technology and innovation, and for effective and well-maintained networks; a culture where transport providers and planners respond to changing needs of businesses, communities and users, and where one ticket will get you anywhere*'.

Linked to five high level objectives, the *National Transport Strategy* sets out three strategic outcomes which are to:

- '*Improve journey times and connections, to tackle congestion and lack of integration and connections in transport which impact on our high level objectives for economic growth, social inclusion, integration and safety*'.
- '*Reduce emissions to tackle the issues of climate change, air quality and health improvement, which impact on our high level objective for protecting the environment and improving health*'.
- '*Improve quality, accessibility and affordability, to give people a choice of public transport, where availability means better quality transport services and value for money or an alternative to the car.*'

The *Long-Term Vision for Active Travel in Scotland 2030* recognises the important contribution that active travel makes towards: better health and safer travel for all; reducing inequalities; cutting carbon emissions and other pollution; delivering liveable, more pleasant communities; and supporting delivery of sustainable economic growth. Its vision is that in: *‘Scotland many more people are walking and cycling for everyday, shorter journeys and that active travel is seen as the norm, regardless of gender, ethnicity, age or background’*. In addition, the *Cycling Action Plan for Scotland (2017-2020)* states that: *‘by 2020 10% of everyday journeys taken in Scotland will be by bike’*.

The Scottish Government’s Programme for Government 2018/19 establishes a vision for the improvement of connectivity, access, and quality of transport within Scotland, including the development of active travel modes, which in turn includes ebikes.

### **Active travel**

*“We will work across all levels of government and with our NHS, businesses and communities to realise the potential of a shift to active travel including as a prescription for better health. In the past year we have supported the take up of e-bikes and e-cargo bikes. Our actions in the coming year include:*

- *promoting walking- and cycling-friendly businesses*
- *subsidising bike hire for jobseekers, modern apprentices, young people and students”*

The role that improvements in transport options play in a wider context is reflected throughout the document, including:

### **Empowered and thriving communities**

*“People, communities and place must be at the heart of sustainable and inclusive growth, so that economic benefits and opportunities can be spread and shared across Scotland’s people and communities. As we implement our community empowerment legislation, we will see alignment between national and local outcomes that will enable co-ordinated support across services and between places, at neighbourhood, town, city or regional levels, and a more joined-up, collaborative and participative approach to services, land, and buildings across all sectors within a place.”*

### **Active Travel Framework**

The Active Travel Framework brings together the key policy approaches to improving the uptake of walking and cycling in Scotland for travel. Drawing on the long-term shared vision and strategic objectives for active travel developed and set out in partnership in 2014, at its heart is an ambition that by 2030, Scotland’s communities are shaped around people and place, enabling walking and cycling to be the most popular mode of travel for short, everyday journeys.

### **Business eCargo Bike research project**

The Business eCargo Bike research project is for businesses and organisations in Scotland to have a long term free trial of an eCargo bike (purchased by EST) for 12 months to demonstrate how this could be used as an alternative to a vehicle, for deliveries or for general business purposes. In return, the business must provide reports of data and feedback to EST on how effective the ecargo bike is for this purpose.

## **Eligibility**

This fund is open to all businesses, social enterprises and charity based within Scotland. The organisation should ideally be replacing an ICE vehicle currently being used, however EST will consider business that demonstrate a good case for an ecargo bike to enhance their business needs and lower their emissions. The successful businesses gaining a free trial must demonstrate they can adequately provide the insurance, public liability, maintenance and secure storage of the ecargo bike.

## **Compliance – what you need to know**

### **Publicity**

All grantees will be encouraged to promote their project in order to raise awareness of active travel issues. This may be through local press articles, staff bulletin articles, social media, open days, educational links with schools and colleges, training courses etc.

Once projects have commenced, the role of Transport Scotland and Energy Saving Trust in providing the free trial equipment should be included in press releases, project literature general marketing activity.

This activity should be recorded as part of the mandatory project report, details of which can be found later on in this document.

### **Sustainability rule**

Applicants will be responsible for maintaining and providing safe storage of the ecargo bike for the 12 month trial period.

### **Reporting requirements**

If your application is successful and your business or organisation is given an ecargo bike on long term loan, you will be required to maintain regular communication with the Business eCargo Bike research project team at EST. Successful applicants will be expected to undertake their own monitoring with the support of the EST.

You will be required to agree to a monitoring process that will involve the collection of data to help inform Transport Scotland, Scottish Ministers and other key stakeholders on the impact of the programme.

As a minimum, successful projects will be required to provide quarterly data on the usage of the ecargo bike including distance travelled, number of trips, number of users and types of cargo. Surveys will also be distributed to users to monitor their experiences. This data will provide a valuable in-sight into how organisations might use ecargo bikes in the future and the main barriers they may face. At the end of the 12-month trial, a short final report detailing the outcomes of the trial will be required.

By signing the application form the applicant is agreeing to report this information when required by EST.

EST and/or Transport Scotland reserve the right to request additional reports beyond the initial project period. This is in order to further analyse the impact of the trials and assess the effectiveness of the Business eCargo Bike research project.

## **How to apply and who to contact**

Applications are available on the eBike Grant Fund website (<https://energysavingtrust.org.uk/scotland/grants-loans/ebike-grant-fund>)

Please ensure that you follow the guidance in this document regarding formatting and number of words per section.

All completed application forms and required attachments must be submitted electronically to [eBikeGrantsScot@est.org.uk](mailto:eBikeGrantsScot@est.org.uk)

## **Fund administration requirements**

The eCargo bike will only be purchased by EST after an agreement has been signed between the applicant and EST. Successful applicants will be responsible for monitoring and reporting on the trial period to Energy Saving Trust.

## **Intellectual property**

Energy Saving Trust and Transport Scotland reserve the right to share information about successful trials in reports, case studies and other channels as they reasonably consider appropriate from time to time. Content will enable readers to assess the viability of projects similar to the successful project.

Organisations that are successfully awarded a long term free trial of an ecargo bike through the Business eCargo Bike research project will need to ensure that Transport Scotland is able to share information without being constrained by intellectual property concerns. Organisations will therefore need to grant Transport Scotland a worldwide, non-exclusive, irrevocable and royalty free licence (with a right to grant sub-licences) to use, for such purposes as Transport Scotland thinks fit, any and all copyright, patents

and other intellectual property rights (whether registered or otherwise) which are created or acquired by the funded organisation or any of the partners in the project in the course of implementing the project.

Energy Saving Trust and Transport Scotland shall be entitled to publish and disclose to third parties, information relating to funded projects with a view to third parties setting up projects similar to the project, although in doing so Energy Saving Trust and Transport Scotland (as appropriate) shall have regard to the confidentiality of any detailed financial information provided by the organisation.

## Useful to know

ACRONYM / TERM	DEFINITION
Applicant	Person or organisation submitting an application to the Business eCargo Bike research project.
Application	An organisation's application to the Business eCargo Bike research project for funding for a project.
Assessment	Scoring and review of the application made prior to any offer of trial will be undertaken by Energy Saving Trust
eCargo	A cycle specially designed for carrying large or heavy loads of cargo.
EST	Energy Saving Trust
Monitoring and evaluation	The requirements for measuring the success of the outcomes.
Trial	A test, usually over a limited period of time, to discover how effective or suitable something is for a specific purpose.
Transport Scotland (TS)	An executive agency of Scottish Government which provided the funding for the Business eCargo Bike research project.

## Annexe 1 – Notes for applicants

The section below illustrates the content that will be required in the application form and entails useful information for applicants.

### 1. Self-assessment checklist

You must complete the checklist provided in the application form before proceeding. If you answer 'NO' to any of the questions in section 1 of the application form, you may be ineligible for the Business eCargo Bike Research Project - 2020/21 and we will therefore not be able to consider your application.

## 2. Applicant details

<b>2.1 Applicant details</b>	
Registered name	The name of your organisation
Legal status	Details of applicant organisations legal status are required for purposes of diligence and verification before any award of funding can be made.
UK company/charity/ public body or other registration no.	If applicable. This will also be used to provide the Scottish company number that for purposes of financial due diligence if your application is successful.
Establishment date	Date the organisation was founded.
Organisation has UK Bank account, published accounts and control over income and expenditure	Please indicate Yes or No.
<b>Address of registered office</b>	
Address	This should be the official registered office for your organisation rather than the office from which regular contact over the course of the project will be made.
Local authority area	Please note the local authority area should be where your registered office is located.
<b>Contact details for correspondence with applicant</b>	
<b>Lead Contact</b>	
Name	
Position	
Contact Number	
Email Address	
<b>Secondary Contact</b>	
Name	
Position	
Contact Number	
Email Address	
Email will be the primary method of contact use so please ensure that the email address is entered correctly and remains active during the application process.	

### 3. Project details

#### About your project:

<b>3.1 Project summary details</b>	
Project title / Reference Number	The title of the project that will be used throughout the award process. The reference number assigned to your project by EST.
Local authority area(s) affected	Local authority area(s) where the equipment for which grant funding is being applied for will operate.
Project Summary  Please provide details of your business and how you intend to use the ecargo bike to enhance your business.  (Max 500 words)	This will be used in press-releases and publicity materials should your application be successful.  Please answer the following questions in this section:  What will the ecargo bike's primary use be? Who will be its primary user? What journeys will it replace? Will it replace a vehicle that is currently doing those journeys?
<b>3.2 Description of eCargo bike and safety equipment</b>	
Please provide details of the ecargo bike you are requesting. Why you have chosen this specific type of ecargo bike?  Please provide website links to the ecargo manufacturer or retailer.	A detailed description of the ecargo bike, including make and model, and why this particular equipment has been chosen. Applicants can use this section to demonstrate how the planned expenditure represents good value for money.

### 3.3 Details of your organisation and wider sustainable transport Programmes

<p>What does your organisation do? Please provide details how/if the organisation provides social and environmental benefits. Does your proposed Business eCargo Bike research project 2020/21 support wider activities that aim to reduce transport emissions, encourage active travel, and improve air quality?</p> <p>(Max 600 words)</p>	<p>Please detail:</p> <ul style="list-style-type: none"> <li>• How the provision of an ecargo bike will reduce transport emissions, encourage active travel, and improve air quality.</li> <li>• Provide specific details of how the Business eCargo Bike research project can lead to a lasting impact beyond the initial ecargo loan period.</li> </ul>
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## 4. Project Scoring Elements

How does your project meet the four Business eCargo Bike research project - 2020/21 project impact criteria?

### 4.1 Needs assessment, general aims and specific objectives

<p>Please also provide a detailed of what journeys the ecargo bike will be making and what is the purpose of these journeys. Please also state the average number of miles the ecargo bike will be travelling on a daily/weekly basis.</p>	<p>Please answer the following questions in this section:</p> <ul style="list-style-type: none"> <li>• Why have you decided to launch an ecargo bike research project?</li> <li>• What are the aims and objectives of the project?</li> <li>• What are the expected outcomes of the project?</li> <li>• Will any model shift occur?</li> </ul> <p>Please try to identify measurable indicators where possible.</p> <p>This section of the application form will be scored.</p>
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(Max 600 words)

## 4.2 Employee Engagement

Please provide details of how you have engaged with your employees to promote the ecargo bike and its use. How will you encourage employees to be more active or sustainable in their business travel? Describe who/area of the business will be using the ecargo bike within your workplace.

(Max 600 words)

Please answer the following questions in this section:

- How was the demand for the project determined?
- Who has been engaged with in order to develop the project?
- Is the whole business aware/on-board with the project?
- Which area of the business will be using the ecargo bike and for what purpose?

This section of the application form will be scored.

## 4.3 Deliverability – timeline, roles and responsibilities

Please provide details of how your business will implement the ecargo bike as a fleet vehicle. What training will be in place for employees to feel comfortable to use the ecargo bike? Will this training be available to all employees? How and who will be responsible for

Please answer the following questions in this section:

- What is the timeline for delivery of the project? Please provide key dates and milestones.
- Who or which department has been identified to manage the project?
- How will reporting and monitoring be managed?
- What plans are in place to ensure maintenance of the ecargo bike?
- Who will facilitate the day to day running of the project?
- Where will the ecargo bike be stored when not in use?
- Have you considered public liability and insurance?
- Do you have ecargo training in place for the employees using the bike?

This section of the application form will be scored.

<p>collecting and reporting on the data collected as part of this trial? How will your business manage the maintenance of the ecargo bike? Can you provide secure storage for the ecargo bike when not in use?</p> <p><b>(Max 600 words)</b></p>	
<h4>4.4 Environmental benefit</h4>	
<p>Please provide details of how the ecargo bike will change travel behaviour within your business. What will the impact be on your carbon emissions? Will the ecargo bike replace a vehicle?</p> <p><b>(Max 500 words)</b></p>	<p>Please answer the following questions in this section:</p> <ul style="list-style-type: none"> <li>• Detail information on the ICE vehicle journeys the ecargo bike will replace.</li> <li>• Will this lead to behaviour change from staff within your business?</li> <li>• How will the business use of an ecargo bike benefit the environment?</li> </ul> <p>This section of the application form will be scored.</p>
<h4>4.5 Wider impact</h4>	
<p>Please provide details of any benefits for the wider community, employees and the community your business interacts with.</p> <p><b>(Max 500 words)</b></p>	<p>Please answer the following questions in this section</p> <ul style="list-style-type: none"> <li>• Does your business work with any communities? Please provide details how the project will benefit the community.</li> </ul> <p>This section of the application form will be scored.</p>

## 5. Monitoring and evaluation

### 5.1 Monitoring and evaluation

<input checked="" type="checkbox"/>	<p>Applicants should note that one of this project's overarching aims is to collect data and information on eCargo bike usage by organisations in Scotland. Successful applicants will be expected to produce and adhere to a monitoring and evaluation framework which will provide an agreed plan to monitor the outputs and outcomes that they will be reporting on. This will include quantitative data such as mileage, utilisation, cyclists etc along with qualitative information in the form of telephone interviews, photos and contribution to case studies and other promotional items.</p> <p>By ticking this box, applicants acknowledge and accept this requirement.</p>
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## 6. Usage

### 6.1 Usage

<input checked="" type="checkbox"/>	<p>Applicants should note that one of this project's overarching aims is to collect data and information on eCargo bike usage by organisations in Scotland. If a business is monitoring and reporting the eCargo bike use to EST as very low and are not using the bike for its intended purpose, EST reserve the right to remove the eCargo bike from the business and distribute to another business that will benefit from it.</p> <p>By ticking this box, applicants acknowledge and accept this requirement.</p>
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## 7. Finance

**How much will the project cost and how will Business eCargo Bike research project - 2020/21 funding be used?**

Please provide a dated quote(s) from supplier(s) of the eCargo bike.

Please fill in the summary table below.

### 7.1 Business eCargo Bike research project - 2020/21 funding request summary

<i>Cost of eligible eCargo bike</i>	£
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**Either the Chair or Chief Executive of the applicant organisation should sign the hard copy of this declaration. It must be a different person to the main contact given in Section 1.**

Signed:					
Title:		First name:		Surname:	
Position in organisation:					
Date:					

## 7.2 Data Protection

### **Data Protection Act 1998 and European General Data Protection Regulation Fair Processing Notice**

This section asks you to confirm your acceptance of the standard data protection terms and conditions applicable to applicants.

Applicants should read the detail of the fair processing notice and data protection statement included within the application. For additional information about how we use personal data, including your rights, please see Energy Saving Trust's privacy policy (<http://www.energysavingtrust.org.uk/privacy>).

#### **How we will use your information:**

Transport Scotland is the data controller in respect of any personal data that you provide when you complete Business eCargo Bike research project - 2020/21 application forms. The EST is Transport Scotland's appointed agents for the purposes of administering the scheme, and they will process the data on Transport Scotland's behalf.

#### **This information is necessary for the performance of a contract.**

We will use the information you provide to assess your application and carry out subsequent monitoring, including site visits, of successful projects under the Business eCargo Bike research project - 2020/21. Some information will be shared with other Government Departments, their agencies and appointed agents to enable the detection of fraudulent applications to the low carbon travel and transport fund and other grants schemes.

Transport Scotland may be required to release information, including personal data and commercial information, on request under the Environmental Information Regulations 2004 or the Freedom of Information Act 2000. However, Transport Scotland will not permit any unwarranted breach of confidentiality nor will we act in contravention of our obligations under the Data Protection Act 1998 and the European General Data Protection Regulation (GDPR).

What non-personal information will Scottish Government make publicly available?

- Details of applications.
- During the assessment stage, the number of applications received will be disclosed on request.
- Details of grant-funded projects.

It is important to the aims of the scheme that the grant-funded projects should act as encouragement for others. Once the applications have been assessed, summary details of the successful projects will be published and disseminated widely, including being published on a dedicated webpage and in press releases. Summary details may include:

- The name of the project.
- The names of the organisations, community groups etc who are members of the project.
- Location of the project.
- Expected benefits.
- eCargo bike allocated to the project under the Business eCargo Bike research project - 2020/21.
- Brief description of the project, including any key technical features (as supplied by applicants).

A final report (as specified in the Guidance Notes) which describes the benefits and performance of the equipment purchased, any difficulties encountered, lessons learned, and associated data may be published in full. Interim reports may also be published.

I confirm that I have read and understood the above data protection statement.

**[Please sign the application form only. This information is included here purely for reference.]**

## 8. Submitting your application

Please submit completed application forms and attachments electronically to [eBikeGrantsScot@est.org.uk](mailto:eBikeGrantsScot@est.org.uk).

The fund will remain open until all 10 ecargo bikes have been allocated. With 10 ecargo bikes to offer on long term trials, applications will be assessed as they are received, each applicant will be informed the outcome of their application. Once all 10 ecargo bikes have been allocated, the fund will close.

When we receive your application by email, we will respond with an acknowledgement. If you don't receive this, please contact us on 0131 555 8642.

#### **Checklist of documentation to enclose/attach**

	<b>Document</b>	<b>Enclosed</b>
<b>1</b>	Business eCargo Bike research project Application Form (signed)	<input type="checkbox"/>
<b>2</b>	Business eCargo Bike research project financial spreadsheet	<input type="checkbox"/>
<b>3</b>	Dated quote(s) from supplier(s) identified in the application form	<input type="checkbox"/>

We aim to notify you regarding the outcome of your application within 6 weeks of the application submission deadline.

If you have any questions regarding your application or would like to discuss any issues before submitting an application, please email [eBikeGrantsScot@est.org.uk](mailto:eBikeGrantsScot@est.org.uk).