

eBike Grant Fund – 2021/22
Guidance and Information for Applicants
Category A and B

Disclaimer

Applicants should be aware that, as the eBike Grant Fund is a developing programme, the application 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.

The Energy Saving Trust and/or Transport Scotland reserves the right to reject an application where:

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

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

- not to consider applications other than those submitted in accordance with the requirements of the application process;
- to issue amendments or modifications to the application documents during the application 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 application process;
- to not award any grant funding under the eBike Grant Fund; and/or
- to cancel the application process at any time.

Any costs or expenses incurred by an applicant (including any partners) or any other person participating in the application process will not be reimbursed by the Energy Saving Trust and/or Transport Scotland. The 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

Transport Scotland announced £900,000 of grant funding is available to assist local authorities, public sector agencies, further and higher education institutions, active travel hubs and community groups to adopt ebikes, ecargo bikes, etrikes, adapted bikes, cargo bikes, tandems and trailers on a large scale as an alternative to car journeys and promote sustainable travel.

The newest commitment builds on three previous rounds of funding; year 1 allocated over £932,000 to 46 projects, year 2 allocated over £1,050,000 of funding to 58 projects and year 3 in 2020/21 allocated £543,000 to 41 projects. Alongside the eBike Grant Fund in 2020/21, £223,000 was allocated to 12 ebikes for key worker projects and ecargo research bike projects, with costs totalling £78,000.

Details are available here: [eBike Grant Fund available in Scotland - Energy Saving Trust](#)

The programme is split into two separate streams:

Category A offering up to £25,000 of funding, to which applications can be submitted at any time up until December 2022.

Category B, offering up to £200,000 in funding for larger scale projects, with two 14-week defined application periods throughout the year. The fund will close if all funds get allocated before deadlines stated.

Energy Saving Trust and Transport Scotland will continue to encourage applicants to apply for extra funding (limited to 5% of the overall project costs) to provide subsidised access to ebike hires for targeted groups. This is to ensure that these target groups, such as those on low incomes, with disabilities or mobility issues, jobseekers, modern apprentices, young people, and students have equal access to these ebike opportunities.

Transport Scotland has committed to running a competitive grant funding process and has appointed Energy Saving Trust (EST) to administer the programme.

About this document

This document provides an overview and guidance to help you complete an application for the eBike Grant Fund.

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

1. **eBike Grant Fund Application Form – (available on request)**
2. **eBike Finances Spreadsheet – (available on request)**
2. **eBike Grant Fund Guidance and Information for Applicants – (this document)**

Please contact eBikeGrantsScot@est.org.uk for an application providing the following information:

- Organisation type (i.e. Local Authority, Community Group etc)
- Estimated total project cost (i.e. including all match funding)

Energy Saving Trust will be running an ongoing application process, with panel assessment dates at various points throughout the year.

The following dates have been set for “Category A Funding” submission deadlines:

- Friday, 23 July 2021
- Friday, 24 September 2021
- Friday, 3 December 2021

The following dates have been set for “Category B Funding” submission deadlines:

- Friday, 6 August 2021
- Friday, 8 October 2021

Please note, dates are provisional and subject to funds remaining from previous rounds. Up to date details will be posted on the [eBike Grant Fund available in Scotland - Energy Saving Trust](#)

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1 Introduction to the eBike Grant Fund

Transport Scotland announced £900,000 of grant funding has been made available to continue supporting local authorities, public sector agencies, further and higher education institutions, active travel hubs and community groups to adopt ebikes¹ and ecargo bikes on a large scale as an alternative to car journeys.

The Strategic aims of the eBike Grant Fund are to:

- encourage the large scale uptake of ebikes, ecargo bikes, etrikes, adapted bikes, cargo bikes, tandems and trailers to support sustainable active business travel as an alternative to car and van use.
- Provide opportunities to trial ebike, ecargo and adaptive cycle equipment and promote their use within the consumer and business sectors.
- Facilitate subsidised access to ebike hire/loan schemes for people with mobility issues, jobseekers, modern apprentices, young people, and students.

2 How much is available?

The eBike Grant Fund is a capital fund. A total of £900,000 has been made available by Transport Scotland in 2021/22 of the eBike Grant Fund.

The Category A fund is open to community groups, third sector, and public sector organisations looking for up to £25,000 (per application) towards projects that will provide opportunities to trial ebikes.

The Category B fund is available to community groups, third sector, and public sector organisations and local authorities for the purposes of providing large scale fleets of pool bikes, bikeshare/hire schemes, ecargo bike share schemes and promoting large-scale uptake of ebikes/ecargo bikes as an alternative to car and van travel. Up to £200,000 towards project costs is available per application.

It is the aim of the fund to support the uptake of ebikes for functional journeys, therefore this should be the focus for both streams of funding. Non-ebike equipment purchased with eBike Grant Fund money should be in support of ebikes i.e. safety equipment numbers should be in-line with the number of ebikes being purchased and is limited to equipment normally used by a rider during operation of an ebike.

In both cases, match funding is required. This must not come from any Transport Scotland derived funds², but may include contributions from the private sector or other public sector bodies.

¹ebikes – refers to ebikes, ecargo bikes, etrikes, adapted bikes, cargo bikes, tandems and trailers

² Cycling Walking Safer Streets funding will be accepted.

For community groups and third sector organisations applying for Category A funding, match funding of 25% of the total project cost is required, and in-kind match funding will be considered.

For public sector organisations applying for Category A funding, and any organisation applying for Category B funding, cash match funding of 50% of the total project cost is required.

Policy context of the eBike Grant Fund

The National Policy Framework

The National Policy Framework vision is for a sustainable, inclusive, safe, and accessible transport system helping to deliver a healthier, fairer, and more prosperous Scotland for communities, businesses and visitors.

This Delivery Plan brings together for the first time the actions across Scottish Government to support delivery of the Strategy to help to realise their vision for transport and support the transformation to more sustainable options. It sets out the actions over the next couple of years, as part of delivering a transport system that is sustainable, inclusive, safe and accessible.

Scotland's National Transport Strategy 2 sets out an ambitious and compelling vision for Scotland's transport system for the next 20 years. There are four priorities to support that vision, each with three associated outcomes:

[Reduces inequalities](#)

'We will ensure active, public and sustainable travel access to employment, education and training locations, continuing to engage with those who have lived experience of transport inequalities, including delivering of our commitment to engage with young people on the future of transport.'

- will provide fair access to services we need.
- will be easy to use for all.
- will be affordable for all.

[Takes climate action](#)

'We face a global climate emergency. We need to aim for a transport system that encourages people to make travel choices that minimise the long-term impacts on our climate and that will increase the wellbeing of future generations. Scotland must transition to a net-zero emissions economy for the benefit of our environment, our people and our future prosperity.'

- will help deliver our net zero target.
- will adapt to the effects of climate change.
- will promote greener, cleaner choices.

[Help deliver inclusive economic growth](#)

'The transport system plays a crucial role in the successful performance of Scotland's economy and ensuring regional cohesion. It enables people to get to work and ensures firms are able to get their goods and services to markets in Scotland and beyond. It is an important contributory factor in Scotland's competitiveness, impacting on productivity

of our labour force and the efficiency of businesses. A thriving Scotland needs an effective transport system’.

- will get people and goods where they need to get to.
- will be reliable, efficient, and high quality.
- will use beneficial innovation.

Improves health and wellbeing

‘We will fund active travel partners, including local authorities and Regional Transport Partnerships to deliver active travel infrastructure projects, and sustainable and active behaviour change work, through our grant funded programmes and where the projects are clearly aligned to the active travel outcomes framework.’

- will be safe and secure for all.
- will enable us to make healthy travel choices.
- will help make our communities great places to live.

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 (2017-2021)* states that, *‘by 2021 10% of everyday journeys taken in Scotland will be by bike’*.

The Scottish Government’s Programme for Government 2020/21 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. *We will restart our work (post lockdown) on tackling air pollution through the low emissions zones in our cities and commit to over £500m investment over the next five years in active travel infrastructure, access to bikes and behaviour change schemes to promote walking, cycling and wheeling. We will also work with local government to rethink how we can build-in these quality of life, and health enhancing improvements to the communities we live in. Delivering on our health goals, climate goals, and economic goals’*.

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.

The eBike Grant Fund

The eBike Grant Fund 2021/22 has been designed to support the above objectives by providing funding for the creation of ebike/ecargo bike fleets, as an active travel, low-carbon transport option.

Evaluation of the fund has shown that users have favoured a longer-term trial of the ebike as opposed to renting the bike for a few hours. Applicants should take this into consideration when applying. All trials would preferably be offered free of charge for a minimum of 3 days but ideally for a longer period of time.

In addition to enabling everyday functional journeys to be taken by cycling, the eBike Grant Fund is intended to address wider themes: recognising the potential that active travel has in supporting social inclusion and health and connectivity in the public transport system. By widening the range of bikes available, applicants should consider more vulnerable groups and demonstrate how the project will ensure schemes are accessible to these groups within the community.

In 2021/22, the eBike Grant Fund will continue to ensure schemes are accessible to more vulnerable groups within communities:

Firstly, by encouraging organisations with public ebike hire projects to apply for subsidy funding in their project proposal, allowing them to offer subsidised ebike hire for those on low incomes, with disabilities or mobility issues, jobseekers, modern apprentices, young people, and students. Subsidised access to ebike hire can be facilitated by “user credit” to cover the cost of accessing hire schemes. This will be limited to 5% of the overall project cost (including match-funding contribution), and evidence of the established cost of hire will need to be provided at the point of application.

Secondly, by encouraging organisations to expand their ebike trial offers to be more inclusive by widening the range of ebikes they can offer and including ecargo bikes, ordinary cargo bikes, tandems, trailers and adapted cycles and trikes. We would like applicants to consider more vulnerable groups at this stage and demonstrate how they will ensure schemes are accessible to these groups within their community.

Projects can target those who are at risk of health issues due to lack of physical activity, people with mobility issues who require an adaptive cycle, or those who are excluded from employment opportunities in areas which lack adequate transport links. In return this will increase user numbers and the range of people with access.

These additional aims should sit alongside a primary focus of encouraging active and sustainable travel via cycling and wheeling for functional journeys.

3 Eligibility

Bodies

Applicants must meet all of the following criteria to be eligible for funding under the eBike Grant Fund:

- Public, community or third sector organisations with a governing body, a democratically elected management committee and a governing document that has been formally adopted.
- Organisations must provide sufficient match funding from an eligible source: other Transport Scotland funding will not be eligible. 50% cash match funding for Public Sector bodies, 25% for Community and Third sector organisations, with in-kind funding only considered for the latter groups.
- Organisations with a proven record in delivering and running capital projects of similar scale to the eBike Grant Fund.
- Organisations with the capacity to sustain the use of purchased equipment beyond the initial project period.

Costs

Grant funding will only be offered for 'pedal assist' or 'pedelec' ebikes and ecargo bikes. 'Throttle assist' ebikes and ecargo bikes will not be eligible to be funded. Please see <https://www.gov.uk/electric-bike-rules> for further details on defining 'Electric Assist Pedal Cycles'.

As the fund encourages equality and equal access opportunities, non-electrified cargo bikes and adaptive cycles can be purchased.

Non-ebike purchases should be limited to equipment that is directly related to the operation of ebikes, limited to the following equipment: bells, helmets, high-visibility clothing, panier bags and racks, lights, pumps, weather covers and security locks. Applicants must seek authorisation from Energy Saving Trust to include any additional items. Please see Annexe 4 for a comprehensive list of eligible equipment.

Additional funding is available to help subsidise public ebike hire for those on low incomes, with disabilities or mobility issues, jobseekers, modern apprentices, young people, and students to encourage uptake. Subsidised access to ebike hire schemes can be facilitated by inclusion of "user credit" to cover the cost of accessing established or new hire schemes. This will be limited to 5% of the overall project cost (including match-funding contribution), and evidence of the established cost of hire will need to be provided at the point of application.

Cycle Storage equipment should not be included in eBike Grant Fund projects as Transport Scotland funding is already available via Cycling Scotland's Cycle Friendly

Employer, Cycle Friendly Campus, Cycle Friendly Community, and Social Housing Development Funds for such equipment.



Please visit <https://www.cycling.scot/our-programmes/cycle-friendly> for further information on the support available from Cycling Scotland, including wider project promotion, community engagement, and cycle skills training.

Addition sources of support

CoMoUK offer free impartial support, expertise, and advice on operational guidance, engaging with target audiences, ebike specifications, project costings and budgets, procurement, app-accessed booking platforms, marketing, and general experience of launching and developing e-bike schemes. They are a charity that supports the development of shared transport: shared bikes, shared cars and shared rides.

CoMoUK have created a guide to support the development of community bike share schemes, split into seven easy to digest sections. The information is designed to support groups on their journey all the way from the early planning stage through to delivery.

More information and guides can be found on their webpage: <https://como.org.uk/shared-mobility/community-schemes/community-bike-share/>

Find out more at www.como.org.uk
Please contact scotland@como.org.uk for support.

Match Funding

Transport Scotland's eBike Grant Fund is designed to promote the uptake of ebikes and ecargo bikes across Scotland, and to have maximum impact match funding is required, allowing more projects to be funded and tying projects in with existing capital expenditure.

Category A:

Public Sector Bodies

A maximum of 50% of the total project cost can be covered by the eBike Grant Fund. Match funding can be covered by organisations own funds, additional public funding (excluding Transport Scotland funds²), or private sector investment.

Community and Third Sector Organisations

A maximum of 75% of the total project cost can be covered by the eBike Grant Fund. Match funding can be covered by organisations own funds, additional public funding (excluding Transport Scotland funds), or private sector investment.

In-kind funding will be considered if there is a shortfall in financial contributions for Category A funding only. Annexe 3 provides additional guidance as to what constitutes in-kind match funding, as well as guidance on ascribing value to resources such as volunteer time.

To discuss eligibility of in-kind contributions please contact a member of the application team on 0131 555 8642 or at eBikeGrantsScot@est.org.uk.

Category B:

A maximum of 50% of the total project cost can be covered by the eBike Grant Fund. Match funding can be covered by organisations own funds, additional public funding (excluding Transport Scotland funds), or private sector investment.

In all cases, match funding must be secured before any project expenditure to be covered by the eBike Grant Fund is incurred.

4 Compliance – what you need to know

Procurement

Procurement of equipment and works (limited to on-street docking stations, excluding grid connection costs) is eligible. Contracts must either be competitively tendered or procured in line with an organisation's standing orders and/or procurement policy to ensure value for money.

Publicity

All grantees will be encouraged to promote their projects in order to raise awareness of active travel issues, and to encourage utilization of the equipment. 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 awarding funding to the project 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 in this document.

Sustainability rule

Applicants should ensure that equipment purchased through the fund should have a long-term prospect of being utilised. Plans should be formulated for the storage and maintenance of equipment that will allow for regular use and long-term integration into the organisation's fleet or community offering. For instance, if you are planning to offer a public hire scheme, you must consider how the distribution and maintenance of bikes will be managed. In cases where items of equipment have been purchased, an inventory or asset register must be retained for audit purposes.

Compliance audit

Applicants should be aware that Energy Saving Trust will manage the audit, compliance, and monitoring processes to ensure the projects are fulfilling their original aims and objectives and progress is in line with their project plans and that work is completed in compliance with eBike Grant Fund requirements. Transport Scotland will also have the right and opportunity to undertake audits on the applicant's project as required. In order to assist with meeting these requirements it is important that applicants have a compliance and audit plan in place which will allow them to plan and resource requirements to meet the compliance standards needed.

The plan should cover aspects of the project such as:

- Good governance.
- Monitor, reporting, and audit financial information.
- Maintenance of financial records and managing financial performance including a separate accounting system or an adequate accounting code for all project transactions.
- Risk identification and management.
- Establish reliable systems for the retention and retrieval of all appropriate documentation, for the auditable life of the operation.

Asset Retention

Organisations must notify EST of any intention to dispose of assets procured with eBike Grant Fund within three years of the award date.

Reporting requirements

If your application is successful and you are awarded funding, you will be required to maintain regular communication with the eBike Grant Fund team at EST.

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

It is important that applications and ultimately funded projects address the following areas:

- The baseline data to be used (or how and when baseline data will be gathered) and whether this will rely upon surveys, national data, or any previous research.
- The desired outcomes of the project including influence on behaviours and attitudes.
- What the outputs of the project will be.
- How you plan to monitor and evaluate success in the medium to longer term.
- What target population(s) this will relate to and impact upon.
- What data will be used to track impact against desired outcomes.
- When will outcomes be measured.
- What processes and systems will be in place to ensure that all reported outcomes are accurate and evidenced appropriately.
- What systems will be in place to ensure retention of appropriate documentation.
- Who will be responsible for these activities.

Successful applicants will be expected to undertake their own project monitoring with the support of EST and will be expected to provide reports on their project's progress.

As a minimum, EST will require successful projects to provide usage data collection, first ride questionnaires of users, and a final report detailing the outcomes of the full project.

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 fund and assess the effectiveness of the eBike Grant Fund.

Please note: Final dates are indicative subject to volume of applications, and satisfactory results from the completion of due diligence processes.

5 How to apply and who to contact

Applications are available upon request from EST at eBikeGrantsScot@est.org.uk. We will not consider applications submitted in any other format.

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

6 The assessment process

Broadly, it is anticipated that all applications will be subject to a three-stage assessment process comprising:

Stage 1. Initial sift to ensure eligibility conditions are satisfied

This will consider type of organisation, eligible costs, match eligibility, financial viability, and total project cost. As part of this stage, there will be a short, designated window (estimated to be three weeks) when Energy Saving Trust will seek clarification or any omission from applicants.

Stage 2. Scoring of all applications against the criteria by Assessors

Transport Scotland and Energy Saving Trust will be inviting representatives from a range of relevant sectors and backgrounds to take part in an assessment process. Bids that satisfy eligibility criteria, including project rationale, strategic fit, community engagement, community benefit, deliverability, sustainability, accessibility, and match funding will proceed to be scored and ranked against the criteria set out in these sections individually by the panel. See section 'Notes for Applicants' for details of which sections will be scored. Scores will be used to produce a ranking of applications and this will help to inform the next stage of the process.

Stage 3. Ratification by an Assessors

The Assessment Panel will convene to consider the individual scoring on ranked bids balanced against priorities for the eBike Grant Fund. Final decision will be subject to Transport Scotland approval.

7 Fund administration requirements

Grant payments

Successful applicants will be responsible for:

- Monitoring, reporting, and auditing financial information on project related costs to Energy Saving Trust.

- Establishing systems for the retention of all appropriate documentation to evidence expenditure, all outcomes and to fulfil compliance obligations.

Payments will be only made by EST after an agreement has been signed between the applicant and EST. Grant funding will then be provided on a reimbursement basis, grantees must submit claims with recipients of purchased project equipment and evidence of defrayment from the organisation's accounts to Energy Saving Trust in order for the grant funds to be claimed. Upfront payments will only be considered in exceptional circumstances and on a case-by-case basis. Evidence will be required from organisations to prove requirement of upfront payments and proof of grant spend after purchase of equipment. Further details on payments and financial requirements will be provided by EST as part of any grant agreement. These will include the requirement for detailed statements of expenditure and requests for funds in the format that will be specified by EST.

Intellectual property

Energy Saving Trust and Transport Scotland reserve the right to share information about projects 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 funded project.

Organisations that are successfully awarded funding through the eBike Grant Fund will need to ensure that Transport Scotland is able to share information without being constrained by intellectual property concerns. Funded 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 funded organisation.

8 Useful to know

ACRONYM / TERM	DEFINITION
Adaptive cycle	A modified bike that fits the individual user's special needs.
Applicant	Person or organisation submitting an application

	to the eBike Grant Fund.
Application	An organisation's application to the eBike Grant Fund for funding for a project.
Assessment	Scoring and evaluation of the application made prior to any offer of grant. Initial screening and scoring of applications will be undertaken by Energy Saving Trust and all applications will then be made available for review and ratification by an independent assessment panel.
Category A Fund	Stream of the eBike Grant Fund offering up to £25,000 of funding towards project costs. Open to constituted community groups as well as public sector bodies.
Category B Fund	Stream of the eBike Grant Fund offering up to £200,000 in funding towards project costs. Open to public sector, community and third sector organisations for the purposes of providing fleets of pool ebikes, ebike hire schemes, and promoting large-scale uptake of ebikes as an alternative to car and van travel.
Conflicts of interest	Any issue or scenario that is incompatible with the aims, eligibility, or legality of the project.
eBike	A cycle assisted by an electric motor. See https://www.gov.uk/electric-bike-rules for further guidance
eCargo	A cycle specially designed for carrying large or heavy loads.
Eligible costs	Costs associated with eligible activities that may be funded under the eBike Grant Fund. These will be capital costs only.
EST	Energy Saving Trust
Match funding	The funding required and secured from other non Transport Scotland eligible sources in order to deliver the project. Eligible sources of match funding are set out in section 4 of this guidance document.
Monitoring and evaluation	The requirements for measuring the success of the outcomes.
Project	The activity, or activities, to be funded by the eBike Grant Fund to deliver any approved purpose(s).
Stakeholders	Those individuals or organisations with potential to be involved with or affected by the project.
Transport Scotland (TS)	An executive agency of Scottish Government

	which provided the funding for the eBike Grant Fund.
The project	The activity for which the application is requesting eBike Grant Fund support.
Vulnerable groups	Individuals or groups of people that are at risk of exclusion from accessing services, activities, opportunities, and events due to a variety of factors.

Annexe 1 – Notes for applicants

The section below illustrates the content taken from the application form that entails useful information for applicants on how to complete the document.

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 eBike Grant Fund - 2021/22 funding and we will therefore not be able to consider your application.

Applicant details

About your organisation:

4.1 Applicant details	
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.
VAT Registration Number (if applicable)	If applicable.
Is your organisation able to reclaim VAT?	If applicable.
Establishment date	Date the organisation was founded.
Organisation has UK Bank account, published accounts	Please indicate Yes or No.

and control over income and expenditure	
Address of registered office	
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.
Contact details for correspondence with applicant	
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.	
Are there any potential conflicts of interest? (Max 150 words)	Please declare any potential conflicts of interest and describe how any conflicts of interest will be addressed. For example, please list any other links between the applicant's team who are involved with or have a stake or any other interest in organisations or individuals involved in the delivery and completion of the activities applied for in this application.
4.2 Previous eBike Grant funding	
Please detail any previous ebike grant funding your organisation has received.	
<i>ebg__ / 20__</i>	
<i>ebg__ / 20__</i>	<i>Name of organisation</i>
<i>ebg__ / 20__</i>	<i>Name of organisation</i>
<i>ebg__ / 20__</i>	<i>Name of organisation</i>

5. Project details

About your project:

5.1 Project summary details	
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.
Breakdown of ebikes, ecargo bikes or adapted cycles. If you do not have	A detailed description of the ebikes, ecargo bikes and adapted cycles and any safety equipment for which funding is being sought, including make and model, and why this particular equipment has been chosen. Applicants can use

(Max 400 words)	
5.3 Details of wider activities	
<p>Please provide details of any additional sustainable transport activities/projects that your organisation is undertaking. Is your proposed eBike Grant Fund project supporting wider activities that aim to reduce transport emissions, encourage active travel, and improve air quality?</p> <p>(Max 400 words)</p>	<p>Please detail:</p> <ul style="list-style-type: none"> • How the provision of ebikes will increase the impact or complement the current activities your organisation is supporting. • Provide specific details of outcomes from other projects, and how the eBike Grant Fund can lead to a lasting impact beyond the initial funding period.

6. Project Scoring Elements

How does your project meet the six eBike Grant Fund - 2021/22 project impact criteria?

6.1 Needs assessment, general aims and specific objectives	
<p>Please give details of who you are targeting and why, how it will be implemented, what types of services will you offer your community. Please state the aims and objectives of the project.</p> <p>Have you considered equal opportunities and working with vulnerable groups within the</p>	<p>Please answer the following questions in this section:</p> <ul style="list-style-type: none"> • Who is the target audience for this project? How will your ebike scheme work? How does this suit your target audience? Evaluation evidence shows that participants prefer longer term trials of ebikes, how have you assessed the need of your community and what conclusions have been drawn from this? • Why have you decided to launch an ebike, ecargo bike, and/or adapted cycle project? • Is the project inclusive of vulnerable groups? • If you are not including adaptive cycles or ecargo bikes, please provide justification for this decision and the ebike

<p>community? If your organisation is not applying for adaptive cycles or ecargo bikes, please provide the reasoning behind this decision and justification for ebike choices. Please also provide a detailed description of any modal shift that will occur as a result of the adoption of ebikes/ecargo bikes.</p> <p>(Max 600 words)</p>	<p>choices.</p> <ul style="list-style-type: none"> • What are the aims and objectives of the project? • What are the expected outcomes of the project? • Will any model shift occur? <p>Please try to identify measurable indicators where possible.</p> <p>This section of the application form will be scored.</p>
<p>6.2 Community/Staff Engagement and partnership working</p>	
<p>Please provide details of how you have engaged with your community or workplace to establish the demand for ebikes/ecargo bikes. Detail how the project has been developed with your community/staff. Detail any partnerships that have formed to support the project development or delivery.</p> <p>(Max 500 words)</p>	<p>Please answer the following questions in this section:</p> <ul style="list-style-type: none"> • How was the demand for the project determined? • How have you assessed the need of your community and what conclusions have been drawn from this? • Who has been engaged in order to develop the project? • Can you provide evidence of demand? • Is the whole organisation aware/on-board with the project? • What partnerships have been established to support the project? <p>This section of the application form will be scored.</p>

6.3 Deliverability – timeline, roles and responsibilities

Please provide evidence of your organisational capacity to deliver this project including implementation timelines, project management structure, commitment to on-going reporting, and ebike maintenance. Have you considered cycle training?

(Max 400 words)

Please answer the following questions in this section:

- What is the timeline for delivery of the project? Please provide a timeline with 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 ebikes?
- What budget do you have for ebike maintenance?
- Who will facilitate the day to day running of the project?
- How will people access the bike(s)?
- How have you assessed training needs of your community?

This section of the application form will be scored.

6.4 Sustainability

Please provide details of how you will maintain the impact of your project over a prolonged period.

E.g. Maintenance and running cost, staff time.

(Max 400 words)

Please answer the following questions in this section:

- Post funding how will the project be managed and by who? E.g. Staff time, ongoing marketing of the scheme.
- How will the project fund insurance, maintenance, and repairs to the bikes?
- How will the project support ongoing activities that encourage ebike usage?
- Will the project be absorbed into existing projects that you manage?

This section of the application form will be scored.

6.5 Community Benefit

Please provide details of how your project will promote equal opportunities and social inclusion within your community. Have you considered vulnerable groups?

Please answer the following questions in this section:

- Has the organisation considered vulnerable groups such as those on low incomes, with disabilities or mobility issues, jobseekers, modern apprentices, young people, those in public transport deprived areas and students?
- Detail how the project will promote equal opportunities within the community.
- If you have not considered social inclusion, please provide details on this decision.

(Max 500 words)	This section of the application form will be scored.
6.6 Subsidised funding	
<p>The eBike Grant Fund encourages applying for subsidised ebike hire scheme access for vulnerable groups within communities. Please provide details of subsidised funding being applied for.</p> <p>If your organisation is not applying for subsidised funding, please provide an outline of what services you will offer your community and if any costs will be attached.</p> <p>(Max 250 words)</p>	<p>Please answer the following questions in this section:</p> <ul style="list-style-type: none"> • Please provide information on the funding requested to help subsidise ebike hire for those on low incomes, with disabilities or mobility issues, jobseekers, modern apprentices, young people, those in public transport deprived areas and students. • How will subsidies be managed if being applied for? • If subsidies have been applied for what will happen at the end of the funding period? • If your organisation is not applying for subsidised access, please provide details explaining why. <p>This section of the application form will be scored.</p>

7. Monitoring and evaluation

7.1 Monitoring and evaluation

How will you monitor and evaluate the impacts of your project?

Applicants are required to acknowledge and accept that they will be required to produce and adhere to a monitoring and evaluation plan by ticking the box in section 7.1 of the application form.

8. Finance

How much will the project cost and how will eBike Grant Fund - 2021/22 funding be used?

Before completing this section, please refer to the eBike Grant Fund - 2021/22 Guidance and Information for Applicants for information on the availability of Transport Scotland funding.

Please provide dated quote(s) from supplier(s) and other additional supporting evidence of all costs.

Please fill in the summary table below.

8.1 eBike Grant Fund - 2021/22 funding request summary	
Cost of eligible equipment	£
Amount requested from the eBike Grant Fund	£
Cash Match Funding	£
In-Kind Match Funding (if applicable)	£
Total Project Costs	£
8.2 Match Funding	
<p>You must attach to this application signed letters from each organisation providing or intending to provide match funding to confirm their intention. These letters must specify the amount of funding they intend to provide.</p> <p>All organisations must be able to demonstrate that their match funding does not originate in any way from a Transport Scotland source. As part of the eBike Grant Fund award process organisations will need to sign a grant offer letter which contains a declaration to this fact and a requirement to produce evidence to support the compliance of all match funding.</p> <p>Please note, whilst confirmation of match funding is not required by the application deadline, full confirmation will be required before any grant funding will be released. If confirmation is not received before costs are incurred, grant funding may not be released to cover these costs.</p> <p>If you are a 3rd sector organisation applying for Category A Funding, in-kind contributions will be considered. For the purposes of the eBike Grant Fund we will be</p>	

using the following definition of 'in-kind': *In-kind contributions are non-cash contributions to a project, typically donated goods and services, which are necessary for the project and would otherwise have to be purchased for the project to go ahead.* Please ensure that you ascribe a monetary value to any in-kind contributions that you are proposing.

9. Supplementary information

Assessment will be based on the answers that are provided in the application form.

Supplementary documents may be used to expand or illustrate your answers which are provided (e.g. licencing and certification documentation, letters of support, detailed fleet vehicle data including make, mode, age, total and annual mileage, total and annual fuel consumption, emissions standard, route(s) operated, etc), however, please be aware that these documents will not be assessed independently. You may submit a maximum of 10 additional pages as supplementary information.

10. Declarations

10.1 Credit Check

All lead applicants will be subjected to a financial check once they have submitted an application. The company number provided in section 3.1 will be used for the purposes of requesting the credit check. Annual accounts covering the last three years, a business plan or a bank reference may also be required before applications are approved.

In order to complete your application process, EST may make searches about you at credit reference agencies who will supply EST with information about the conduct of any accounts you hold, as well as information from the Electoral Register or Companies House. The agencies will record details of the search whether or not this application proceeds. This could affect your ability to get credit elsewhere within a short period.

EST may use credit-scoring methods to assess this application and to verify your identity. Credit searches and other information which is provided to us and/or the credit reference agencies, about you and those with whom you are linked financially may be used by EST and other companies if credit decisions are made about you. This information may also be used for debt tracing and the investigation and prevention of fraud and money laundering as well as the management of your account. Information held about you by the credit reference agencies may already be linked to records relating to others, if you have previously made a joint application.

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 2.

Signed	
Title	
Full name	
Position in organisation	

10.2 Public Subsidy Rules

The grant may constitute a public subsidy in terms of the law, regulations, rules, and guidance applying in the UK and/or the UK's international obligations in relation to public subsidies ("the Public Subsidies Rules"). The grant is being provided in accordance with Article 3.2(4) of Chapter 3 of Title XI of the Trade and Cooperation Agreement between the European Union and the UK. This allows single economic actors to receive less than 325,000 Special Drawing Rights (approximately £344,600) (the "Value Threshold") of public subsidies over any three-year fiscal period without the subsidy having to comply with the other provisions set out in that Chapter.

Your organisation must be eligible to receive the grant in accordance with the Value Threshold and we may be required to withhold payment of, or reclaim all or any part of the grant from you, to the extent necessary to ensure that the grant, either on its own or when taken together with any other financial assistance given or to be given to you by us or any third party, complies with the Public Subsidies Rules.

To confirm that you are eligible to receive this assistance you must declare the full amount of any public subsidies you have already received in the last two and the current fiscal years, and any public subsidies for which you have applications outstanding. Potentially any assistance from a public body might be a public subsidy.

This may include grants, loans, guarantees or other forms of assistance from central or local government, economic development agency, a devolved administration, or a Business Link. If you are unsure as to whether any assistance that you have received is public subsidy, please contact the body from which the assistance was received for confirmation. Please set out below the total amount of

public subsidies received by the organisation (including outstanding applications and public subsidies received by other group companies) in the last two and current fiscal years. *

*** For each item of public subsidies please provide details of the identity of the funder and the value of public subsidy received.**

Fiscal year	Funder	Value

10.3 Data Protection

Data Protection Act 1998

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 eBike Grant Fund - 2021/22 application forms. 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 eBike Grant Fund - 2021/22. 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.

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.
- Grants allocated to the project under the eBike Grant Fund – 2021/22.
- 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.

Signed:|

Date:|

11. Submitting your application

All completed application forms and required attachments must be submitted electronically to eBikeGrantsScot@est.org.uk by the following dates:

The following dates have been set for “Category A Funding” submission deadlines:

- Friday, 23 July 2021
- Friday, 24 September 2021
- Friday, 3 December 2021

The following dates have been set for “Category B Funding” submission deadlines:

- Friday, 6 August 2021
- Friday, 8 October 2021

Applications submitted after these deadlines will be considered at the next available date. Please note, the latter dates are subject to funds remaining available after the initial round of applications.

Checklist of documentation to enclose/attach:

	Document	Enclosed
1	eBike Grant Fund Application Form (signed)	<input type="checkbox"/>
2	eBike Grant Fund financial spreadsheet	<input type="checkbox"/>
3	Dated quote(s) from supplier(s) identified in the application form	<input type="checkbox"/>
3	Confirmation or letter of intention from supplier of match funding	<input type="checkbox"/>
4	Any further supplementary information (limit 10 pages)	<input type="checkbox"/>

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

Annexe 2 – Scoring guidance

The following scoring framework will be used to assess applications. There are five project impact criteria that will be scored out of five – the total score for a project will be out of 25.

0: Does not meet the requirements or cover points for consideration, no evidence provided

1: Minimal relation to strategic aims and consideration points, minimal evidence provided

2: Meets basic strategic aims and covers some consideration points, lacks compelling evidence

3: Meets the majority of strategic aims and covers majority of points of consideration, provides basic evidence

4: Covers all or most strategic aims, with points of consideration covered, and evidence provided on most points

5: Covers all strategic aims and points for consideration, with compelling evidence or examples for most or all points.

Please note that the ‘what will assessors consider’ column provides an indication of the sorts of questions assessors will consider. It is **not** exhaustive, nor will every question be relevant to every application.

Project impact criteria				
Application Form Section	Key Question	What will assessors consider.	Score	Comments and Justification
Needs assessment/general aims and project specific objectives				
6.1	Does the proposed project fit with the strategic aims of the eBike Grant Fund – 2021/22?	<p>How do the project aims align with the eBike Grant Fund – 2021/22? I.e. has the application demonstrated how the project will promote the use of ebikes or ecargo bikes on a wide scale?</p> <p>Is the proposed project likely to achieve these stated aims based on the project description?</p> <p>Have the following questions been answered:</p> <p>Who is the target audience(s)?</p>	/5	

		What are the expected outcomes of the project?		
		Will any model shift occur?		

Community/Staff Engagement and Partnerships

6.2	Is there evidence that potential users of the equipment have been consulted and potential partners have been sought out.	<p>Evidence of target audience engagement.</p> <p>How will the target audience benefit from the project?</p> <p>How was the target audience involved in identifying the project?</p> <p>Has the project identified partners that will add value?</p> <p>Is the whole organisation aware/behind the project?</p>	/5	
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Deliverability

6.3	Can the project be delivered by March 2022?	<p>Does the application provide realistic costs and targets?</p> <p>Have all aspects of the project such as storage, maintenance and training of participants been considered?</p> <p>Is there sufficient management buy-in and project oversight to ensure implementation of any change to working practices?</p> <p>Have the following questions been answered:</p> <p>What is the timeline for delivery of the project? Has a delivery plan been provided?</p> <p>Who or which department has been identified to manage the project?</p> <p>How will reporting and monitoring be managed?</p> <p>What plans are in place to ensure maintenance of the ebikes?</p>	/5	
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		Who will facilitate the day to day running of the project?		
		How will people access the bike(s)?		
Sustainability				
6.4	Is there a commitment to fully engage in the reporting requirements and also maintain the use of the equipment in the long term?	<p>Has the applicant detailed their plans for collection of relevant data that will demonstrate achievement of their stated outcomes?</p> <p>Does the project demonstrate how the equipment fits into the long term transport strategy or community plans within the applicant organisation?</p> <p>How will the organisation maintain the assets?</p> <p>Have the following questions been answered:</p> <p>Post funding how will the project be managed and by who? E.g. Staff time, ongoing marketing of the scheme.</p> <p>How will the project support ongoing activities that encourage ebike usage?</p> <p>Will the project be absorbed into existing projects that you manage?</p>	/5	
Community Benefit				
6.5	Is there evidence of the project practically addressing issues such as access to employment, disability, community development, and reducing inequalities.	<p>Has the project identified specific vulnerable or disadvantaged groups that could benefit from access to ebikes/ecargo bikes?</p> <p>What benefit will any identified groups derive from access to ebikes/ecargo bikes? E.g. improved access to centres of employment, increased physical activity levels, improved community facilities.</p>	/5	
Subsidised funding				

6.6	Has the applicant applied for subsidised funding?	If so, does it meet the criteria for the subsidies, will it reach the right people? If they have not applied, will there be any charges related to service they offer.	/5	
Risks				
	<p>Please describe any significant risks that you have identified that may impact on the deliverability of this project.</p> <p>E.g. match funding status, timeline issues, sustainability plan.</p>			

Annexe 3 – In-kind Match Funding

Where applicants are applying for the Community Fund, “in-kind” funding may be considered in addition to or as an alternative to a direct cash contribution.

For the purposes of the eBike Grant Fund, the following definition will be used:

In-kind contributions are non-cash contributions to a project, typically donated goods and services, which are necessary for the project and would otherwise have to be purchased for the project to go ahead.

While we will assess each offer of in-kind contributions on a case-by-case basis, the following guidance is intended to provide insight into the type of contribution that could be accepted and the required level of evidence and justification that will be required. The following list is not exhaustive and is for exemplar purposes only.

Storage facilities

We expect ebikes/ecargo bikes purchased via the eBike Grant Fund to be stored in a suitable facility. This could be a dedicated cycle storage locker/shelter or garage/room within a building. Applicants can attribute the cost of providing this facility to the project as a match funding contribution if it can be demonstrated that part or all of the provided facility is being utilised solely for the purpose of storing the ebikes. Calculating the value of this can be done in a number of ways. For example, if storing equipment within a building, the standard hire rate for the room in question during standard operational hours (minus costs for heating, lighting, and other costs usually associated with use by people) could be considered a project contribution. Evidence of standard room hire rates for the facility in question would need to be provided. If a dedicated cycle storage facility has been arranged (but NOT from Transport Scotland derived funding) then the cost of this facility (or part being used for ebikes) can be considered as a contribution.

Staff/Volunteer Resource

Whilst the fund will not cover the cost of staffing a project, any direct staff or volunteer time allocated to operating the intended programme (e.g. maintenance, hire supervisor, fleet manager) can be counted as a match-funding contribution. If allocating volunteer hours, please use the current Living Wage (<https://www.livingwage.org.uk/what-real-living-wage>) to calculate the value of their contribution, unless you can demonstrate another appropriate way of determining value.

Appropriate records of staff and volunteer time spent on ebike projects must be kept, as Energy Saving Trust and Transport Scotland reserve the right to request evidence of participation throughout the duration of the project. Details of volunteer and staff duties relating to the project should be disclosed at the point of application, with justification of need required at this time also. Any major disparity between planned and actual volunteer/staff hours should be notified to Energy Saving Trust at the earliest point possible.

Time constraints for in-kind contributions

All in-kind contributions should be provided within twelve months of the project funding award date. Applicants should take this, alongside seasonal variances in potential uptake of ebikes, into consideration when calculating any staff or volunteer resource being provided for their project.

Evidence

Grantees will be required to provide evidence of match funding contributions alongside their claims for grant moneys. This will take the form of invoices for equipment being provided, timesheets/records for staff/volunteering hours, or statements declaring the value of contribution signed by a relevant director or executive.

Annexe 4 – List of Eligible Equipment

The following list of equipment has been deemed eligible for funding from the 2021/22 eBike Grant Fund. Whilst this list is extensive, it is not exhaustive and additional equipment may be considered on a case-by-case basis. Applicants should contact the eBike Grant Fund team eBikeGrantsScot@est.org.uk to discuss the inclusion of any items that are not included in this list in their application.

Category A and B Projects:

- eBikes (as defined by <https://www.gov.uk/electric-bike-rules>)
- eCargo Bikes
- Helmets
- Lights (front and rear)
- Locks
- Hand pumps
- Track pumps (1 per project location)
- Puncture repair kits (1 per bike)
- Multitool (1 per bike)
- Hi-vis vests/jackets
- Panniere racks
- Panniere bags
- Mud-guards
- Trailer (capable of carrying children or cargo)
- Trip computer
- Weather cover
- Hire/Membership fee subsidy (capped at 5% of overall project cost). Must be in addition to other measures.

Category B projects only:

- On street docking and charging station (excluding grid connection charges)
- Battery charging infrastructure
- Back-office system license (on a per-bike basis)