

This document provides the questions contained in the Stage 2 LEVI Capital fund application form.

This document should be used for *INFORMATION ONLY* when ready, applicants should draft and submit their applications via the LEVI application portal.

Here: - [LEVI Funding Application Portal \(est.org.uk\)](https://est.org.uk)

Step 1: Application Form

Strategic Fit

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How does your project deliver on the objectives of the Local EV Infrastructure Fund?

The LEVI Fund aims to:

- Deliver a step-change in the deployment of local, primarily low power, on-street charging infrastructure across England.
- Accelerate the commercialisation of, and investment in, the local charging infrastructure sector.

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

The LEVI Fund conditions will be used to assess LEVI projects to ensure they align with the LEVI Fund objectives.

1. Describe existing local EV infrastructure, including current charging device availability for residents without off-street parking and any existing chargepoint operators in the proposed project area.

0/300 words

2. Describe the challenges with existing local EV infrastructure provision in your authority, your understanding of potential future needs and what needs to be done to fill the service gap.

0/500 words

Please include any future public charging infrastructure demand estimates e.g. to 2030.

3. Explain how LEVI funding will help to address these challenges, with a particular focus on residents without off-street parking.

Please explain how far LEVI goes to support your estimated public charging demands e.g. to 2030, especially local charging, and how you expect estimated provision beyond LEVI will be met.

0/500 words

4. Describe how this project supports your local and/or regional long-term EV charging strategy and broader organisation objectives, programmes and/or projects, as set out in the relevant Local Transport Plan.

0/300 words

Spending Assessment

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Provide information based on estimated pre-procurement figures. Please refer to nevis.cenex.co.uk/repository/funding-evi and nevis.cenex.co.uk/repository/private-funding

Information about charging device technology, definitions and terminology is available here: [Just Starting Out - National EV Insight & Strategy | Delivered by Cenex](#)

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

1. Indicate how many charging devices of each technology type you anticipate installing with LEVI funding support:

In your answer, please detail the number of charging devices you anticipate to install through your LEVI project rather than the number of sockets.

The majority of costs in your LEVI Project should be going to charging devices less than 22kW which are best suited to slower-powered local charging.

Charging device type is one of:

- Gullies/ **Cross Pavement Solutions**
- Lamppost charging device
- Wall-mounted charging device
- Bollard charging device (split out 7.4 and 22kW)
- Flush-fitting charging device
- Residential rapid charging device
- Other (please outline)

* Total Costs refer to Total Hardware and Installation Costs

** Per CP Costs refer to Per CP Hardware and Installation costs

2. Describe the charging devices listed as other

3. Explain why this is the best split of charging infrastructure for your area. 0/500 words

The majority of costs from your proposed LEVI project should be used to support charging devices rated lower than 22kW which are best suited to slower powered, residential charging. If you anticipate installing $\geq 22\text{kW}$ or rapid (50kW +) charging devices, justify how they will support residents to charge equitably and why public subsidy is required to support this infrastructure.

If you do not anticipate installing lamp column charging devices or gullies (particularly in urban areas) your answer should explain why these are unsuitable.

4. What is your total predicted project cost?

5. What is your total LEVI funding request?

Where applicable, provide a breakdown of the expected sources of other public funding e.g. council budget

Find more information about [funding electric vehicle infrastructure](#).

6. Where applicable, detail the expected sources of private funding and a breakdown of the estimated amount of funding e.g. CPO investment, loan finance, infrastructure banks

Find more information about [private funding](#).

7. Describe how your project leverages private funding or finance to benefit drivers without off-street parking 0/500 words

Your answer must reference:

- Your predicted public: private funding ratio and a rationale for this
- What the private funding will be used for
- The benefits of utilising public funding for this project

0/500 words

8. Outline why your LEVI charging devices wouldn't have been installed by the private sector without government support

0/500 words

Find out more information about [passive infrastructure \(or passive provision\) required for EV charging](#)

9. Do you plan to install passive infrastructure (i.e. underground cabling and electrical capacity without above ground charging equipment)?

Do you plan to install passive infrastructure (i.e. underground cabling and electrical capacity without above ground charging equipment)?

Yes No

10. If yes, how many charging devices do you plan to provide for?

Low speed (0 - <3.7kW)

Standard (3.7kW - <8kW)

Fast (8kW - 49kW)

Rapid (50kW - 149kW)

Ultra-rapid (150kW and over)

Gullies/Cross Pavement Solutions

Other charging devices

11. Outline the rationale for installing passive infrastructure

0/300 words

Summary guidance on inclusion of other tech types.

E.g., Supporting technologies, such as energy generation and battery storage, may be considered for LEVI funding where there is a clear rationale, cost benefit and/or long term additionality to the project.

Find out more information about [supporting technologies for electric vehicle infrastructure](#).

12. Does your project plan include any supporting/complementary technology to reduce overall costs?

For example, energy generation and/or storage

Does your project plan include any supporting/complementary technology to reduce overall costs?

Yes No

13. If yes, select which technology types do you plan to install

If yes, select which technology types do you plan to install

Describe any technology listed as other

14. Provide an overview of the rationale and cost savings for any supportive technology you plan to install, explaining why this is essential to make the project viable

0/300 words

15. Outline how you will ensure potential suppliers have considered carbon reduction within the installed charging devices lifecycle. This should include, but not be limited to, charging device design, manufacture, transport, installation, operation and decommissioning

Expected Commercial Arrangements

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[More information](#)

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

1. Summarise any relevant market engagement activities that have been carried out and how this engagement has shaped your project design, including commercial arrangements and procurement approaches.

If you are planning further market engagement before your LEVI procurement, please outline when you anticipate this will take place and what you will be testing.

0/500 words

2. What is the proposed commercial arrangement for the project?

What is the proposed commercial arrangement for the project?

Own & Operate

Public - Private Commercial Partnership (concession)

Public - Private Commercial Partnership (external operator)

Joint Venture

Land Lease

Other/none of the above

3. Please describe other

4. Provide further detail on your proposed commercial arrangement and reasoning

This should include:

- Why you have chosen this commercial arrangement
- Other options you considered and discounted, and the reasoning behind this
- How this commercial arrangement will work within your project
- How you have developed a competitive procurement plan to maximise charging provision in return for your LEVI subsidy

Find out more about [commercial arrangements](#).

0/500 words

Find out more information about [concession Heads of Terms for commercial arrangements](#)

5. Outline your approach to exclusivity and how you will ensure a competitive and consistent service for end-users.

Your answer should explain whether you plan to procure in lots and, if so, how these will be organised (technology, geography etc). If you intend to procure a single

supplier, please outline how you will manage the risk of monopolistic behaviour to ensure a competitive and consistent service for end-users. 0/500 words

Heads of Terms recommendation: A justification of the approach to local market competition and exclusivity should be developed by the LA. This should take into account the short and long-term consequences including effect on end-users. The LA should form its position based on this justification report.

0/300 words

6. Outline your proposed approach to revenue / profit share and explain why it has been chosen.

Heads of Terms Recommendation: The LA should not agree a profit share, which is difficult to audit and reduces near-term income for the LA.

Where there is not enough public funding in place to cover contract management, the LA should receive a fixed indexed annual charge to cover only contract management and administration costs.

Once utilisation reaches a sufficient threshold, a small additional revenue should be added to the fixed charge to share upside value with the LA (this could be a proportion of the % Gross Margin calculated under Tariff Administration).

In exceptional circumstances, the LA should reserve the right to waive its share of the revenue, with the reduction in costs being passed directly to the end-user.

0/300 words

7. Outline how the local authority/authorities will retain appropriate influence or control over tariffs throughout the duration of the contract

Heads of Terms Recommendation: There are two recommendations, which can be implemented independently or together.

Firstly, a p/kWh Margin Cap. In this instance, the service provider should have full control to change their tariffs, without having to seek approval from the LA.

The margin cap will be agreed at the beginning of the contract with reference to the wholesale cost of energy.

If the service provider exceeds the cap in a given period, clawback clauses would apply to that period - this approach is expanded in more detail in the sections, below.

Secondly, a Benchmarking Review. In this instance, the service provider must apply to the LA to change its tariff, supplying appropriate information on the tariffs currently being charged for similar EVI.

The LA would have a set period of time within which to review this request to agree or decline the tariff change, after which the service provider can implement it (or not).

Thirdly, a hybrid approach could apply the p/kWh margin cap over the length of the contract with benchmarking reviews for specific tariff changes.

0/300 words

8.Explain how you have considered time of use tariffs and smart charging, and how you determined whether these are appropriate

0/300 words

9. What is the proposed contract length for the project?

Heads of Terms recommendation: 15 years starting from contract signature.

10. Explain the reasoning for this approach and outline proposed details of relief clause proposals0/300 words

Heads of Terms recommendation: The LA offers some opportunities for relief, including:

- Material delay in obtaining necessary Permits, consents and permissions, provided the service provider has complied with all relevant processes; and/or
- Material delay caused by the Grid Connection, provided the service provider has complied with all relevant processes.
- Downtime caused by grid operational problems (i.e power cut).
- Material delay caused by slow response to Approvals by the LA.

The LA should not extend the Term for any Relief events that occur during the contract Term.

11. Explain your proposed approach to ownership of the charging assets, during and at the end of the contract?

Heads of Terms recommendation: The Service Provider owns, maintains and operates the assets for the duration of the Term. At the end of the Term, the Exit Strategy should apply.

If Charging Assets are to be transferred to the LA, this should be at nil cost to the LA and at the discretion of the LA.

Else, the Charging Assets should be decommissioned at nil cost to the LA.

12. Explain your proposed approach to ownership of the local connection assets, during and at the end of the contract?

Heads of Terms recommendation: Ensure responsibility for Local Connection Assets is transferred to the LA at nil cost at the end of the contract.

13. Outline the proposed division of responsibility, control and risk for operational and maintenance costs0/300 words

14. How do you plan to identify and dispose of any redundant assets?

Meeting Consumer Needs

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One of the aims of LEVI is to ensure access to charging infrastructure is widely available to residents, including those who live in areas currently deemed non-commercial by the market. In the sections below, please outline how your project plans to address this.

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

- 1. Describe your approach to site selection.**
- 2. Outline the proposed responsibilities the local authority/authorities and chargepoint operators have in deciding charging device locations, including how you will incorporate areas which are not yet commercially viable.**

Point 4 in the LEVI Heads of Terms contains recommendations on site selection.

- 3. Describe how you will ensure charging devices benefit residents without off-street parking. This should include an estimated percentage of charging devices that will be installed on and off-street e.g. in car parks.**

Note the majority of LEVI funded charging devices should be installed on-street in line with the fund's objectives.

- 4. Where you propose to install charging devices off-street, please explain how these locations will support residents without access to off-street parking and why on-street infrastructure is not more suitable.**
- 5. Outline any measures you will take to ensure local residents have access to charging devices installed in this project. This may include:**
 - How residents in the area can make permanent or temporary use of controlled parking zones
 - Resident parking schemes
 - Permits and/or parking charges

Find out more about [preferential charging for residents](#).

0/300 words

- 5. Where known, provide a list of postcodes or areas for the proposed charging device locations.**

0/300 words

- 6. What type of land will the proposed charging devices be installed on? Tick all that apply**

What type of land will the proposed charging devices be installed on? Tick all that apply

- Highway authority maintained land
- Local authority-owned land (e.g. public car parks)

Private-owned land

7. Name all anticipated landowners

0/300 words

8. Include details of lease agreements where appropriate

0/300 words

Learn more about [climate risks and mitigations](#)

9. Outline any considerations you have made for the impact of weather and climate events, such as heavy rainfall and flooding, at proposed charging device locations. If locations could be impacted by these hazards, include any measures you will take to mitigate against this risk

0/300 words

Find out more information about [accessible site design](#) and meeting [consumer needs](#)

10. Does your project plan include the installation of charging devices which conform to the requirements of Public Accessibility standard for charge points PAS 1899?

Does your project plan include the installation of charging devices which conform to the requirements of Public Accessibility standard for charge points PAS 1899?

Yes all

Yes some

No

12. What steps will you take to conform to the requirements contained in the PAS 1899 standard for accessible charging? If you are not installing PAS 1899 compliant charging devices explain why

0/500 words

Save Changes [Back](#)

Strength of the Delivery Plan

Click here for 'excellent' examples from Tranche One

Find out more about [working groups](#), [resourcing for EV infrastructure programmes](#) and [DNO engagement](#) on the Knowledge Repository.

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

1. Describe your expected project team and how this is structured

- Explain how this project team will work with governance and project boards, working groups, district authorities and contractors. 0/800 words

2. Outline your project management arrangements including governance arrangements, roles and responsibilities

0/300 words

3. Optional: provide supporting documents

Add Another File

4. Outline the allocation of operational responsibility between the local authority, Chargepoint Operator (CPO), Distribution Network Operator (DNO) and other third parties.

0/300 words

5. Outline your stakeholder communication and engagement plans for this project

0/300 words

6. Optional: upload any supporting documents

7. How have you engaged DNOs during the development of your charging infrastructure strategy and in project planning?

Find out more about [DNO engagement](#).

0/300 words

8. Attach evidence of engagement

- Evidence of engagement can include email correspondence or a letter of support from the DNO relating to the charging infrastructure strategy and project planning
- Engagement should include connection cost estimations e.g. through an estimation tool. Full quotes are not required at this stage

9. Provide an overview of the project assurance arrangements (independent and impartial reviews) you will put in place at different stages of the project lifespan

0/300 words

10. Upload your risks, assumptions, issues and dependencies register

This should clearly outline the top 3 risks

11. How will risk be managed throughout the project?

Describe your risk, issue and change management arrangements and plans

0/300 words

12. Provide a project timeline, including month/year of installation, highlighting any dependencies. Please upload any supporting evidence

Add Another File

13. Outline any additional KPIs that you will be using for the project, in addition to the required KPIs as outlined below

- Number of sockets installed
- Number of charging devices installed
- Power of charging devices installed
- Location of charging devices
- Month/year of anticipated installation
- LEVI funding request
- Private investment

Save Changes

Step 2: Criteria Compliance

Draft Tender Document Review

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A key objective of the LEVI fund is to accelerate the commercialisation of, and investment in, the local infrastructure sector. A key indicator for this is that the proposed approach to procurement maximises the charging provision secured in areas of need for the subsidy available. As such, we expect local authorities to go out to open competition with their allocated LEVI funding to determine the best offer from the open market for the funding available. As set out in the [LEVI Capital Fund Conditions](#), the lead authority should provide evidence of a new competitive procurement through the tendering process.

Top tip: check that your responses align with the recommendations in LEVI [Heads of Terms](#) for commercial arrangements

Where local authorities do not plan to carry out a new competitive procurement for part of their project, they must provide clear reasoning and evidence of value for money and additionality. Existing contracts will only be considered by exception and reviewed on a case-by-case basis. Any such contract will need to have been openly tendered and align with the LEVI capital fund conditions. LAs who have stated a preference to use an existing contract should already be in discussion with the LEVI Support Body about this.

1. Please upload your draft tender documents for review

Add Another File

If you have an existing contract that you wish to use as part of your LEVI plans, and you have not already supplied this to the LEVI Support Body, please upload it now

2. Where your preference is to use an existing contract for any part of your LEVI plans, provide clear reasoning and evidence value for money and additionality, and explain how the contract aligns with the LEVI Fund conditions

0/500 words

3. Explain how the procurement was openly tendered and why a new procurement with LEVI funding would not lead to a better value for money outcome in a rapidly developing market

0/500 words

4.If you intend to offer any exclusivity (whether in a new or existing extract), provide details and justify your approach, accounting for the short and long-term consequences including the effect on end-users.

0/500 words

5.Explain your evaluation approach.

This should test the market on the number of charging devices it can deliver for your LEVI subsidy. Bids should be evaluated accordingly in order to maximise rollout. Please refer to the LEVI Heads of Terms [Evaluation Guidance](#) for more information.

Step 3: Compliance with Ongoing Commitments

Compliance with Ongoing Commitments

Confirm that the following ongoing commitments will be met

Top tip: check that your responses meet the LEVI Fund conditions as outlined in the [Capital Fund Information Pack](#)

1. I agree to share the contracts with CPOs and any other project partners with the Support Body and OZEV for feedback and review

I agree to share the contracts with CPOs and any other project partners with the Support Body and OZEV for feedback and review

Yes No

2. I agree to provide more information on any aspect of the application if requested

I agree to provide more information on any aspect of the application if requested

Yes No

3. I agree to provide charging device usage data according to this template.

Yes No

4. Upon completion of the project, I agree to provide a project completion report as per the required template

Upon completion of the project, I agree to provide a project completion report as per the required template

Yes No

5. I agree to keep the Support Body updated with any changes to the staff lead and contact details for this project

I agree to keep the Support Body updated with any changes to the staff lead and contact details for this project

Yes No

6. I agree that any installations will be carried out in line with procurement responsibilities and within subsidy control rules

[Refer to Knowledge Repository](#)

I agree that any installations will be carried out in line with procurement responsibilities and within subsidy control rules

Yes No

7. I agree to complete an Equalities Impact Assessment when appropriate

I agree to complete an Equalities Impact Assessment when appropriate

Yes No

8. I agree to provide quarterly reporting against the KPIs

I agree to provide quarterly reporting against the KPIs

Yes No