

**PLEASE NOTE:**

If you are applying for a part loan and you elect to fund the balance from a third party financier you should avoid entering into any agreement that removes your title to the assets in question since this would contravene the terms and conditions of the loan scheme.

After we have received your completed application a consultant from the Carbon Trust will contact you, and possibly your supplier(s), by telephone. The consultant is acting on behalf of the Carbon Trust and their role is to gain a sufficient understanding of your energy saving project in order to verify the Energy Saving Assessment in this Step. When this has been accomplished your application will be processed by the Carbon Trust.

We will also use the figures you provide to calculate the Carbon Threshold. This is our way of checking that the savings from your project will result in a reduction in emissions of carbon into the atmosphere.

The size of the loan that can be applied for will be determined by energy saving costs and carbon savings only. Other savings, for example, in maintenance and labour cannot be taken into account.

## DECLARATION

**Declaration:**

In providing the information contained within this application form and subsequently in applying for an Energy-Efficiency Loan as provided by the Carbon Trust's Energy-Efficiency Loan scheme, the Applicant hereby declares that:

- it is the responsibility of the Applicant to obtain quote(s) for the project and accept responsibility for checking that the proposed equipment is fit for the purpose required and capable of both installation at the proposed location and integration into the existing works/processes;
- it accepts that neither the Carbon Trust, Atkins Limited, DEFRA, the Welsh Assembly Government nor Invest NI shall be liable for the results of any consultancy or assistance provided during the application process or any negligence or default of any consultant engaged by the Carbon Trust;
- all information provided throughout this application process and subsequently is true and agrees that this shall form the basis of any subsequent loan contract;
- it accepts that further searches may be required and in the future details of how the associated Energy-Efficiency Loan account is conducted may be provided to credit reference agencies for input to a central register where other institutions may cross reference for future credit assessment purposes;
- it has no known connections with the Carbon Trust, Atkins Limited, or any Consultant from the Carbon Trust;
- it accepts that to proceed with this Energy-Efficiency Loan application a declaration will be required that the Applicant has not received state aid exceeding the 'de minimis' level (e.g. certain grants, reduced rate loans, subsidies etc) the benefit of which exceeds €100,000 (approximately £70,000) in the previous three years, including this loan application. The amount of state aid your loan would represent is up to 34.1% of its value.
- if this application is successful, you will be sent a formal Loan Agreement for signature.

**I have enclosed the following:**

1. Fully completed application form  tick
2. Quote(s) from equipment suppliers  tick

**Signed for and on behalf of:**

Company name \_\_\_\_\_

Your name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

This should be returned using the pre-paid address label provided to:  
Energy-Efficiency Loans, The Carbon Trust, 3200 Century Way, Thorpe Park, Leeds LS15 8ZB.

**DATA PROTECTION**

As a result of applying for this service, you consent to your details being stored on a database which may be used to send you information on other programmes and services from the Carbon Trust. If you wish to update your record or have it deleted or you have any questions, please contact the Carbon Trust Advice Line on 0800 085 2005.

**COMPLAINTS PROCEDURE**

If you have a complaint about the service, please contact the Carbon Trust Advice Line on 0800 085 2005 and you will be put in contact with the Energy-Efficiency Loan scheme manager.

Registered at: 8th Floor, 3 Clement's Inn, London WC2A 2AZ. © The Carbon Trust, November 2006.

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# 3 YOUR STEP APPLICATION TO AN INTEREST FREE LOAN



### BEFORE YOU START:

- You must have returned an Eligibility Checklist to us and been contacted by us regarding your eligibility
- All steps of this application form must be completed fully and returned with all required supporting information
- You are responsible for filling in the form correctly; but your equipment supplier(s) must help you with Step 3
- Your application will not be processed until it is complete and we have received all necessary information

### YOU MUST RETURN:

All of the following to us, using the pre-paid address label provided:

- Fully completed application form
- Quote(s) from equipment suppliers

## 1 YOUR DETAILS

Contact name: \_\_\_\_\_

Job title: \_\_\_\_\_

Telephone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

Company name: \_\_\_\_\_

Company address: \_\_\_\_\_

Postcode: \_\_\_\_\_

## 2: PROJECT DETAILS

### YOU MUST INCLUDE: SUPPLIER QUOTES WITH YOUR APPLICATION

What is the TOTAL annual energy bill for your entire site? £ \_\_\_\_\_

Description of the existing system to be replaced/updated: \_\_\_\_\_

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Description of the proposed project: \_\_\_\_\_

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Company name of supplier(s) with whom you will need to place an order for the proposed project?  
You must send us an itemised quotation from each supplier. However we do not require multiple quotations for the same work.

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When do you expect to place the order(s) for the project? \_\_\_\_\_

What is the TOTAL cost of your project (excluding VAT)? £ \_\_\_\_\_

What is the expected structure and timing of payments to your supplier?

Eg, will you pay the supplier in full after completion of the works; or will you make staged payments; if so when will they take place.

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## 3: ENERGY SAVING ASSESSMENT

### YOUR SUPPLIER SHOULD HELP YOU WITH STEP 3

#### PLEASE NOTE:

- If it is likely your operation will change significantly after the proposed energy saving project is complete you will need to complete a supplementary sheet in place of Step 3, which can be obtained via the Loans Team by calling 0113 306 6222. For example, will your operating hours change; will your output units increase or decrease? You will need to take this into account when calculating your savings and the size of your loan. Your supplier must use the additional sheet to record this data and supporting assumptions.
- If your project involves power factor correction you must complete a supplementary sheet in place of this Energy Usage Table. Please contact the Loans Team for this supplementary sheet on 0113 306 6222.

#### Energy Usage Table:

- Your supplier(s) should provide the necessary support and information to complete the three areas indicated by: **S**
- Complete the table below giving details of your existing system and proposed project, split by fuel type.
- 'Energy Usage' here means the proportion of your total annual energy bill directly attributable to the project.

Now calculate the Energy Usage for your project:

FUEL TYPE	EXISTING SYSTEM <sup>1</sup>			POST COMPLETION <sup>2</sup>		
	Unit Price <sup>3</sup> p/kWh	Annual Usage kWh <b>S</b>	Annual Cost £	Unit Price <sup>3</sup> p/kWh	Annual Usage kWh <b>S</b>	Annual Cost £
Electricity						
Natural Gas						
Gas Oil						
LPG						
Wood						
Other (specify)						

#### NOTES

1. Existing System: enter actual current data (a full year to date or nearest 12 month period available) prior to starting the energy saving project.

2. Post Completion: enter the projected average annual data that will result after completion of your energy saving project.

3. Unit Price: this should include the Climate Change Levy if applicable.

#### Standard Calorific Values, kWh per unit fuel

Natural Gas	Gas Oil	LPG
10.97 kWh/m <sup>3</sup>	10.83 kWh/litre	7.42 kWh/litre
29.310 kWh/therm	12,670 kWh/tonne	13,720 kWh/tonne

#### Additional information:

List any assumptions made or conditions required for the projected energy savings to be achieved as calculated above.

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#### **S** Information provided by:

Supplier company: \_\_\_\_\_ Telephone: \_\_\_\_\_

Suppliers contact: \_\_\_\_\_ Mobile: \_\_\_\_\_

Position in company: \_\_\_\_\_ Email: \_\_\_\_\_

#### Energy Payback Ratio Table:

- Use the table below to calculate your Energy Payback Ratio. This will be used to determine the loan amount you can apply for.
- Energy Payback Ratio must be LESS THAN, or EQUAL TO, FIVE, to qualify for a full Energy-Efficiency Loan.  
For example, for the minimum loan amount of £5,000 the project would require a saving of at least £1,000 a year.
- If the Energy Payback Ratio EXCEEDS FIVE you may still apply for part funding.  
In such a case the maximum loan size is 5 x annual saving, provided the total is greater than £5,000 and less than £100,000.

Now calculate the Energy Payback Ratio for your project:

Desired Loan Amount: i.e. exact loan amount you wish to borrow.	£
Annual Savings: using the figures given in the Energy Usage Table, subtract the Post Completion Annual Costs from the Existing System Annual Costs.	£
Energy Payback Ratio: divide the Desired Loan Amount by the Annual Savings figure you have entered above to give you the payback ratio of your project.	