

Office of Energy and Climate Change

Drive electric NSW EV fleets incentive

Bidding checklist – Round 2

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Contents

Document purpose	4
.....	
Tips for submitting your bid	5
.....	
Individual fleet stream	6
.....	
1. Information required to prepare your bid	6
2. Evidence requirements to support your bid	8
3. Type of evidence accepted	9
3.1 Expected mileage of the new electric vehicle (EV)	9
3.2 Purchase price (EV and benchmark vehicle)	10
3.3 Residual value (benchmark vehicle)	11
3.4 Servicing and tyres information (EV and benchmark vehicle)	12
3.5 Electricity rates (BEV charging)	12
3.6 Renewable energy source (BEV charging)	13
3.7 Monthly leasing cost (EV)	14
3.8 EV price above stipulated caps	14
4. Evidence checklist	15
Aggregator stream	17
.....	
5. Information required to prepare your bid	17
6. Evidence requirements to support your bid	18

Energy Saver website: energysaver.nsw.gov.au/EVfleets





Document purpose

This document should be read with the EV fleets incentive guidelines. This can be found at energysaver.nsw.gov.au/EVfleets alongside answers to frequently asked questions, information session details/recordings, and other useful information.

This document aims to help you:

- collect mandatory information you need to prepare your bid
- prepare evidence you need to support your bid
- understand evidence that is acceptable to the Office of Energy and Climate Change (the office)
- have the relevant information ready when going through the first 2 steps in the bidding platform (the platform).

In this document the terms 'EV' and 'eligible EV' refer to battery electric vehicles (BEVs) and fuel cell electric vehicles (FCEVs). The use of the term 'benchmark vehicle' refers to the vehicle that the fleet manager would have procured instead of the EV. The 'benchmark vehicle' may be an internal combustion engine vehicle (ICEV), hybrid electric vehicle (HEV) or a plug-in hybrid vehicle (PHEV).



Tips for submitting your bid

Do your homework: read this checklist, the funding guidelines, and other information as provided at energysaver.nsw.gov.au/EVfleets

- Remember that all figures entered in the platform must be exclusive of GST.
- Label all bid evidence clearly, making sure to mention the number plate of the benchmark vehicle (where applicable). Also ensure evidence is dated, e.g., 'VIN plate photo - CPX 567 - 06.06.2022'.
- If providing fuel data as evidence, ensure it is for the period of a typical year (i.e. not impacted by COVID-19).
- If you need help calculating the percentage of renewable energy that will be used to charge any BEVs, please refer to the renewable energy calculator available at energysaver.nsw.gov.au/EVfleets

Still have questions? Please email electric.vehicles@environment.nsw.gov.au



1. Information required to prepare your bid

To prepare your bid (step 1 of the bidding platform), you will need to collate the information listed below to address **mandatory fields**.

Information required	Check
Your fleet structure data:	
<ul style="list-style-type: none">• list of vehicle categories [passenger vehicles (PVs), sport utility vehicles (SUVs), light commercial vehicles (LCVs) and vehicle types (e.g. PVs small, PVs medium, PVs large)] included in your fleet.• for each applicable vehicle category (PVs, SUVs, LCVs):<ul style="list-style-type: none">○ estimated total number of vehicles registered and operating in NSW○ % of owned vehicles○ % of leased vehicles○ lessor's name (if leasing is applicable).	
Details on each BEV/FCEV that you plan to include in your bid, including:	
<ul style="list-style-type: none">• expected annual mileage• expected location (i.e. garaged in a metropolitan area or regionally)• expected typical use (operated in an urban context and/or used for intercity/regional travelling)• retention period, capped at 4 years• estimated percentage of time that the new BEV will be recharged at public charging facilities. Note: the current industry average is that BEVs access public charging sites to satisfy up to 8% of their charging needs. The remaining needs are satisfied by base charging infrastructure (i.e. the chargers at your facilities or at the employees' homes, if the vehicle is home-garaged overnight)• if applicable, expected type of renewable energy to support base charging at the site where the BEV will be garaged• if applicable, expected percentage of base charging supported by renewable energy• if you would like a contribution for a BEV smart charger for the vehicle.	
Using the total cost of ownership (TCO) gap calculated by the platform, the level of incentive that your organisation would like to request from the office.	

Information required**Check**

In the case where you are replacing a vehicle, the plate number of the vehicle(s) you intend to replace by procuring EVs.

In the case where you are expanding your fleet by procuring a new EV, the plate number of the vehicle(s) in your fleet with a similar operational profile to the new EV(s), i.e. same use and same expected mileage.

In the case where you are a subscription or rental car provider, the plate number of the vehicle(s) in your fleet that is representative of the average operational profile of the new EV(s).





2. Evidence requirements to support your bid

Before submitting your initial bid (step 2 of the bidding platform), you will be asked to provide some evidence to support the information included in step 1 of your bid.

The key things to understand with respect to evidence requirements are:

✓ **There is evidence required for all bids (mandatory evidence)**

All bids are required to provide evidence to prove the expected mileage of the new EV(s).

✓ **There is additional evidence required only for some bids (conditional evidence)**

You must provide adequate evidence if any of the following scenarios apply:

- you claim your new BEV(s) will be charged with renewable energy at the garaging location
- you include an EV in your bid that exceeds the price cap stipulated by the incentive guidelines
- you include monthly leasing payments in the TCO calculation
- you change any of the following pre-set TCO values:
 - purchase price
 - residual value
 - servicing and tyres
 - electricity rates (to calculate BEV charging costs).

✓ **The evidence may be specific to each vehicle, multiple vehicles or to your broader fleet policies**

Where possible, the office will only ask for evidence that relates to your entire fleet and/or can be applied to multiple vehicles. However, in some cases you will be required to provide evidence for every vehicle included in your bid.

✓ **There is no requirement for evidence if you select an alternative benchmark vehicle, but you may be asked for clarifications**

The bidding platform is designed to compare by default a selected BEV/FCEV against an ICE petrol benchmark vehicle from an **equivalent** vehicle category. However, you can change the benchmark to select other technologies (i.e. HEV, PHEV) or fuels (i.e. diesel) to match the vehicle you would have procured otherwise.

You can also choose a benchmark vehicle from another category. This is to address situations where fleet managers are using the transition to EVs to optimise their fleets (e.g. the procurement of an EV in a smaller category).



3. Type of evidence accepted

The bidding platform will track your responses in step 1 and prompt you to provide evidence in step 2. Please use the instructions below to ensure the evidence you provide is aligned to the office’s requirements.

Evidence that does not comply with the instructions below will not be accepted and may result in your bid not being considered.

3.1 Expected mileage of the new electric vehicle (EV)		
Evidence requirement	Evidence scope	Purpose
Mandatory	Vehicle specific/required for each vehicle.	<p>To demonstrate the robustness and reliability of the new BEV/FCEV mileage estimate.</p> <p>This reflects the assumption that the BEV/FCEV will perform a similar amount of km of the vehicle being replaced/proxy.</p>
Documents accepted as evidence:		

In the case of **fleet replacement**, one of the following options is required:

Option 1

Telematics data of the vehicle that will be replaced by the new BEV/FCEV for the period of a typical year (i.e. non Covid-impacted). For example, you could use FY 2019.

Option 2

Fuel data of the vehicle that will be replaced by the new BEV/FCEV for the period of a typical year (i.e. non Covid-impacted). For example, you could use FY 2019.

Option 3

Odometer readings of the vehicle that is being replaced. This can be:

- a photo of the actual odometer, or
- export from a vehicle logbook application, or
- a photo of a physical logbook.

Please ensure odometer data clearly shows the period covered (preferably at least 12 months), plus:

- a photo of the VIN plate, plus
- a proof of purchase from a dealer or manufacturer.

If the purchase proof has not been kept, a copy of the registration certificate **PLUS** a statement on letterhead indicating when the vehicle was purchased.

Documents accepted as evidence (continued):


UNDER ALL OPTIONS:

If you expect the mileage of the new BEV/FCEV will not match the mileage of vehicle replaced, please provide a short statement outlining the reasons for the expected differences.

If you are **expanding your fleet** by procuring a new BEV/FCEV, please provide evidence as described in one of the options listed above for a vehicle from your fleet that performs a similar duty, i.e. a vehicle that has an operational profile similar to the new EV you are adding to your fleet (proxy vehicle).

If you are a **subscription or rental car provider**, please provide evidence as described in one of the options listed above for a vehicle from your fleet that is representative of the average operational profile of the new EV(s).

3.2 Purchase price (EV and benchmark vehicle)

Evidence requirement	Evidence scope	Purpose
 Conditional Only required for each vehicle whose default purchase price value has been changed.	Vehicle specific/required for each vehicle.	To verify the validity of the proposed purchase price.


Documents accepted as evidence:

An up-to-date quote or a copy of communications from a relevant panel arrangement that shows pricing. The quote/communication must be for a vehicle in the same category as the selected EV and/or benchmark vehicle.

If changing the purchase price of a vehicle, do not include the registration fees in this purchase price. Registration fees are captured in a separate item in the bidding platform's TCO calculator.

Please make sure to input the purchase price exclusive of GST in the bidding platform.

3.3 Residual value (benchmark vehicle)

Evidence requirement	Evidence scope	Purpose
<p> Conditional</p> <p>Only required if default residual values for the benchmark vehicle(s) (ICEV/PHEV/HEV) are changed in the TCO calculation.</p> <p>Please note that you can change the residual value for the benchmark vehicle(s) only if you have also updated the purchase price and provided a quote for a specific vehicle.</p>	Fleet-wide.	To explain how you have calculated residual values for the benchmark vehicle.

Documents accepted as evidence:


A statement on the organisation's letterhead outlining the process for determining residual value within the organisation.

The statement should be short and clear (no more than 200 words) and cover the source of data for residual values and the date the data was accessed. Acceptable sources include:

- redbook or similar industry database
- internal re-sale value records
- feedback from an authorised dealership, particularly if there is a buy-back offered.

If you use different sources for different vehicles, your statement must be clear in describing which vehicle(s) the listed sources apply. You also must attach evidence of the used source (e.g. a copy of your internal re-sale value record). Please note the EV residual value has been fixed.

3.4 Servicing and tyres information (EV and benchmark vehicle)

Evidence requirement	Evidence scope	Purpose
 Conditional Only required if default servicing and tyres values for the selected BEV/FCEV and/or for the benchmark vehicle (ICEV/PHEV/HEV) are changed in the TCO calculation.	Fleet-wide.	To justify the source of servicing and tyres costings included for the BEV/FCEV and/or for the benchmark vehicle.

Documents accepted as evidence:

A short statement (max 200 words) on an organisation’s letterhead outlining the process for estimating servicing and tyres expenditure.

If the servicing and tyres value has been changed for both the BEV/FCEV and the benchmark vehicle, two separate statements, one for each technology, must be submitted.

Accepted methods you can reference in your statement are:


- service log books
- dealer servicing agreements.

Only a description of the process is needed, and no actual documentation is required.

However, if an audit is conducted in the future, documentation on real costs will need to be produced to support the claim.

If you use different processes for different vehicles, your statement should be clear in describing which vehicle(s) the listed processes apply to.

3.5 Electricity rates (BEV charging)

Evidence requirement	Evidence scope	Purpose
 Conditional Only required if default electricity rate values are changed.	Multiple vehicles.	To prove that the proposed electricity rates are applicable to the electricity consumed to charge the BEV(s).


Documents accepted as evidence:

A current electricity bill from a primary garaging location of the BEV(s).

It is understood that some vehicles may charge in multiple locations. The office is looking for the location where most of the charging will occur (which is usually the primary garaging location). This may be an office or depot location, or the home of an employee.

If the BEV(s) included in the bid have different primary garaging locations, multiple bills should be provided and supported by a short statement (max 200 words) on the organisation’s letterhead describing the expected primary garaging locations for each BEV.

3.6 Renewable energy source (BEV charging)

Evidence requirement	Evidence scope	Purpose
 Conditional Only required if you indicate the BEV(s) will be charged with renewable energy at a garaging location.	Vehicle specific or multiple vehicles.	To demonstrate the use of renewable energy for charging (from an eligible source) and properly calculate the carbon intensity of the BEV(s).

Documents accepted as evidence:

You will need to provide evidence of both the estimated percentage of renewable energy used for charging and the source of renewable energy.

Evidence about the percentage of renewable energy — a short statement (max 500 words) on an organisation's letterhead listing the BEVs charged with renewable energy and outlining the source and the process for estimating the percentage of renewable energy used to support charging requirements, at their garaging locations.

The office has developed a renewable energy calculator to help bidders estimate the percentage of renewable energy used to charge their BEVs. The calculator can be accessed at energysaver.nsw.gov.au/EVfleets

If you have not yet installed a renewable energy system (e.g. solar) but are intending to do so, please provide a short statement indicating the expected date the system will be installed and operational. Please also provide evidence to support your claim (e.g. a contract or declaration from the installer).

Statement examples:

1. 'We are procuring 3 Hyundai Ioniqs and we shall install a 7kW charger for each of them at our workplace. Each vehicle will travel on average 50 km per day. The new vehicles have a real range of 266 km which means 100% of the charging requirements can be covered by charging at the garaging location at our workplace. Since we are procuring 10% green power for our workplace, we have estimated that 10% of the new EV charging requirements will be supported by renewable energy.'
2. 'We will not be installing a charger at work for the new Tesla Model 3, and as such 92% of its charging will be at home and 8% at public charging stations as per national averages provided. The home of the employee has a large 10kW solar system on the roof and a smart charger, so we expect 20% of total home charging will be completed using solar energy. Therefore, 26% of the time this vehicle will be charged with renewable energy.'


Documents accepted as evidence (continued):

Evidence about the source of renewable energy – accepted evidence includes:

EVIDENCE	SPECIFICATION
Direct purchase of green energy	Bill for the National Meter Identifier (NMI) that will feed the garaging/charging location for the vehicle.
Renewable energy power purchase agreement (PPA)	PPA documentation for the purchase of renewable energy – and evidence of its applicability to the NMI that will feed the garaging/charging location for the vehicle.
On site renewables	Bill for the NMI linked to the installation and to the vehicle(s) garaging/charging location.

If the BEVs included in the bid have multiple charging/garaging locations served with renewable energy, evidence should be provided to address all vehicles and locations.

3.7 Monthly leasing cost (EV)

Evidence requirement	Evidence scope	Purpose
 Conditional Only required if you are leasing the vehicle.	Vehicle specific.	To verify the validity of the proposed monthly leasing cost.


Documents accepted as evidence:

A leasing quote addressed to your organisation issued after the opening of the bidding round.

The leasing quote should be for the new EV.

The quote should clearly specify what is included in the monthly cost and the estimated mileage used for the quotation.

3.8 EV price above stipulated caps

Evidence requirement	Evidence scope	Purpose
 Conditional Only required if you are proposing to procure a passenger/SUV EV above the \$100,000 price cap.	Vehicle specific.	To demonstrate that the model is needed for business operations and there is no fit-for-purpose alternative under the price cap.











Documents accepted as evidence:

A statement on the organisation's letterhead outlining your business operations and business needs and demonstrating there are no other vehicles available on the market that are suitable for your specific circumstances that fall under the cap.



4. Evidence checklist

The following can be used as a simple checklist to ensure all evidence is provided. Please note you will not be able to progress in the bidding platform if you do not complete mandatory fields. You will also be prompted to upload evidence in the bidding platform. This checklist is provided for information purposes only and does not need to be included.

Item	Evidence requirement	Check	Evidence scope	Check
EV expected mileage	 Mandatory		Included for each vehicle?	
EV vehicle purchase price	 Include, if you have changed the pre-set value(s)		Included for each pre-set value changed?	
Benchmark vehicle purchase price	 Include, if you have changed the pre-set value(s)		Included for each pre-set value changed?	
Benchmark vehicle residual value	 Include, if you have changed the pre-set value(s)		Does your evidence cover all vehicles affected?	
EV servicing and tyres information	 Include, if you have changed the pre-set value(s)		Does your evidence cover all vehicles affected?	
Benchmark vehicle servicing and tyres information	 Include, if you have changed the pre-set value(s)		Does your evidence cover all vehicles affected?	
Electricity rates	 Include, if you have changed the pre-set value(s)		Does your evidence cover all vehicles affected?	
Renewable energy sources	 Include, if applicable		Does your evidence cover all vehicles supported by renewable energy?	
Monthly EV leasing payment	 Include, if applicable		Included for each vehicle?	
Declaration for EV(s) exceeding price cap	 Include, if applicable		Included for each vehicle?	

Key:  Mandatory  Conditional





5. Information required to prepare your bid

To prepare your bid (step 1 of the bidding platform), you will need to collate the information listed below to address **mandatory fields**.

You may not yet have full commitment from your customers, so you will need to use averages and estimate. However, you are encouraged to carefully investigate your customers' plans and readiness to include more EVs in their fleets while preparing your bid.

Information required

Check

Details of EV models you plan to include in your bid, including:

- total number (e.g. 10 Hyundai Kona Highlanders, 20 Nissan Leafs)
- the annual average driving distance estimated for the selected EV models
 - for example, you are including 10 Hyundai Konas to support 3 customers and you know that these 3 customers will drive the vehicles on average 22,000 km per annum, based on previous arrangements.
- the average monthly lease cost you will apply to your customers for the selected EV model(s)
- typical location (i.e. garaged in a metropolitan area or regionally) of the selected EV model
- typical use (operated in an urban context and/or used for intercity/regional travelling) of the selected EV model(s)
- expected public charging requirements of the selected EV model(s)
- if your customers would like a contribution for a smart charger for the selected EV model(s).

You can include a model twice to reflect different needs and manage different scenarios (e.g. 30 Hyundai Konas @ 22,000 km based regionally and 20 Hyundai Konas @ 15,000 km based in a metropolitan area).

Renewable energy expectations across all vehicles included in your bid:

- expected type of renewable energy to support charging at the site where the BEVs will be garaged
- expected average percentage of charging undertaken using renewable energy across the BEVs included in your bid.

With a consideration of the TCO gap calculated by the bidding platform, the estimated average level of incentive you will pass on to your customers.



6. Evidence requirements to support your bid

You are not required to provide evidence before submitting your initial bid (step 2 of the bidding platform).

However, you will need to provide evidence if your organisation is successful in the bidding process, as per the requirements below.

Requirement	Check										
1. A TCO gap report for the EVs you have ordered, with assumptions, and including the estimated emissions abated based on the final mix of vehicles.											
<ul style="list-style-type: none"> • Please use the TCO gap report downloadable from the Energy Saver website. • The TCO gap report includes an emissions calculator that uses the office’s methodology. • You need to provide a TCO gap report for each customer and every vehicle. 											
2. Evidence to support the TCO gap report and emissions calculations:											
<table border="1"> <thead> <tr> <th style="background-color: #f4a460;">EVIDENCE REQUIRED</th> <th style="background-color: #f4a460;">ACCEPTED DOCUMENTS</th> </tr> </thead> <tbody> <tr> <td>Expected mileage of the new BEV/FCEV</td> <td>Refer to acceptable evidence under 3.1.</td> </tr> <tr> <td>Renewable energy</td> <td>Refer to acceptable evidence under 3.6.</td> </tr> <tr> <td>Monthly lease cost</td> <td>Refer to acceptable evidence under 3.7.</td> </tr> <tr> <td>Vehicle above price cap</td> <td>Refer to acceptable evidence under 3.8.</td> </tr> </tbody> </table>		EVIDENCE REQUIRED	ACCEPTED DOCUMENTS	Expected mileage of the new BEV/FCEV	Refer to acceptable evidence under 3.1.	Renewable energy	Refer to acceptable evidence under 3.6.	Monthly lease cost	Refer to acceptable evidence under 3.7.	Vehicle above price cap	Refer to acceptable evidence under 3.8.
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Monthly lease cost	Refer to acceptable evidence under 3.7.										
Vehicle above price cap	Refer to acceptable evidence under 3.8.										
3. Fleet structure information on each of the customers you will lease EVs to. Please use the TCO gap report downloadable from the Energy Saver website to collate this information.											
4. Sign-off declaration by the customer, confirming the number of EVs and BEV smart chargers procured, and the value of the incentive included in the leasing package. Please use the declaration template downloadable from the Energy Saver website.											



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