|  |  |  |
| --- | --- | --- |
| **Background information** | | |
| Business name and trading address: |  | |
| Company registration number: |  | |
| VAT registration number: |  | |
| SIC Code |  | |
| Website: |  | |
| Current Directors and Roles: |  | |
| Major shareholders:  (including respective shareholdings) |  | |
| Principal activities – main products/services and locations: |  | |
| Current Full-Time Jobs in Scotland & locations: |  | |
| Has the company engaged with Scottish Enterprise or Business Gateway in the last 12 months? | Yes/ No? If **yes,** please provide details & contacts. | |
| **Details of the purpose for which you would like funding support** | | |
| **Summary** | | |
| Description, rationale and timescales to complete growth plan:  (including expected benefits to business) |  | |
| Current status (in terms of planning/ commitment/funding). |  | |
| What element of the funding will be used for Research & Development/Innovation in new products/services? |  | |
| Amount of company contribution & source. |  | |
| Amount of private sector funding secured (amount, type, provider, & terms). If none, provide details of all enquiries made and responses. |  | |
| Amount of funding support required from Scottish Enterprise & why, including repayment preference. |  | |
| Available security? | Yes, No? If **yes,** please provide details | |
| Why would the investment not go ahead without Scottish Enterprise support? |  | |
| **Planned Expenditure** | | |
| **Expenditure** | £ | Details & Dates |
| Land and buildings |  |  |
| Plant and machinery |  |  |
| IT & office equipment |  |  |
| Other |  |  |
| **Total** |  | Over \_\_\_\_\_ years |

|  |  |
| --- | --- |
| **Economic impact**: need to demonstrate that any new jobs are not at the expense of a local competitor i.e. job displacement | |
| **Markets served** | |
| 1. existing:  * industry sectors * geographical coverage * growth prospects |  |
| (b) post investment:   * industry sectors * geographical coverage * growth prospects |  |
| **Main customers** | |
| 1. five largest existing customers: |  |
| 1. post investment: |  |
| **Main competitors (including locations)** | |
| 1. existing: |  |
| 1. post investment: |  |
| (c) impact on competitors of undertaking your investment |  |
| (d) how is your product/service different from that offered by competitors? |  |

**Please provide details regarding the current position and at the end of 3 years post funding**

**(or end of the funded business plan if shorter) for the following areas**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **ECONOMIC APPRAISAL - Markets and Employment** | | | | | | |
|  | **Area** | **Current** | **Next 3 years\*** | **Movement** | | |
| % of Business in: | Scotland |  |  | 0% | | |
| Rest of UK |  |  | 0% | | |
| Europe |  |  | 0% | | |
| Others |  |  | 0% | | |
| % of Competitors in: | Scotland |  |  | 0% | | |
| Rest of UK |  |  | 0% | | |
| Europe |  |  | 0% | | |
| Others |  |  | 0% | | |
| % of Suppliers in: | Scotland |  |  | 0% | | |
| Rest of UK |  |  | 0% | | |
| Europe |  |  | 0% | | |
| Others |  |  | 0% | | |
| Number of jobs (FTE) | Scotland |  |  | 0 | | |
| Rest of UK |  |  | 0 | | |
| Europe |  |  | 0 | | |
| Others |  |  | 0 | | |
| **Total** | **0** | **0** | 0 | | |
|  | |  |  |  | | |
| *\* or end of funding period if shorter* | |  |  |  | | |
| Projected Measures for **3 years** **following funding\*** (£’000s): | | | | | | |
| Total forecast increase in Turnover as a result of this support | | | | | £ | |
| - of the total above what is the value of international sales\*\* | | | | | £ | |
| - of the total above what is the value of domestic UK sales | | | | | £ | |
| *\*\*International sales are classified as ex-UK sales* | | | | |  | |
|  | | | | | | |  |
| The total number of **Scottish** jobs (FTE) which: | | **Current** | **Next 3 years\*** |  | | |
| How many FTE do you currently employ | |  |  | Full time equivalents (FTE is defined as working more than 30 hours a week - ASHE definition). As a broad rule of thumb, 2 part time jobs = 1 full time . | | |
|
| * Percentage of staff currently paid the Real living wage (£12.00 per hour, Oct 2023) | |  |  | Pay at least £12.00 per hour (Oct 2023), equivalent to an annual salary of at least £23,400 based on a 37.5 hr week | | |
|
| - Percentage of staff currently on Zero Hours contracts | |  |  | No guaranteed hours of work | | |
|
| How may new / additional FTE employees will be created as a result of this funding round? | |  |  |  | | |
| - of these FTE above how many Scottish jobs are paid the ‘Real living wage’ (£12.00 per hour , Oct 2023) | |  |  | Pay at least £12.00 per hour (Oct 2023), equivalent to an annual salary of at least £23,400 based on a 37.5 hr week | | |
|
| - of the FTE above how many are Green Jobs | |  |  | Jobs in businesses that produce goods / provide services that benefit the environment or conserve natural resources; or  Jobs in which workers duties involve making their establishment production processes more environmentally friendly or use few natural resources. | | |
| - of the FTE above how many of these are on zero hour contracts? | |  |  | No guaranteed hours of work | | |
|
|  | | | | | | |  |
| **Do you apply Fair Work First Practises** | | | | | | | Yes/No |
| ttps://www.gov.scot/publications/fair-work-first-guidance | | | | | | |  |
| The Company pays the Real Living Wage to all employees | | | | | | | Yes/No |
| The company use zero hours contracts​ appropriately or does not use zero hours contracts | | | | | | | Yes/No |
|
| The Company has appropriate channels for employees to have an effective voice | | | | | | | Yes/No |
|
| The Company takes action to tackle the gender pay | | | | | | | Yes/No |
|
| The Company invests in workforce development​ | | | | | | | Yes/No |
| The Company creates a more diverse and inclusive workplace | | | | | | | Yes/No |
|
| Flexible and Family friendly working practises | | | | | | | Yes/No |
|
| The Company opposes Fire and Rehire practices | | | | | | | Yes/No |
|
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| --- | --- | --- |
| Planned R&D expenditure (total amount) as a result of the funding round | | £ |
| Planned capital expenditure as a direct result of the funding round. | | £ |
| Summarise R&D/Capital investment activity, start and finish dates and planned result, as well as details of any new markets entered: | | |
|
|  | | |
| Does your business have a plan in place to reduce operational greenhouse gas emissions by 2045? | Yes/No | |
| Are there significant CO2 savings as a direct result of this support? | Yes/No | |
| Is the Company active in the Circular Economy? | Yes/No | |

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| **Other Company Information** |

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| --- | --- |
| Company’s current external funding (lenders, facilities, security granted) |  |

|  |  |
| --- | --- |
| Details of all professional advisors assisting with the investment. |  |

|  |  |
| --- | --- |
| Details of any internal funding i.e. shareholder/investor/Director/inter-company loans (amounts, terms, security granted) |  |

|  |  |
| --- | --- |
| Is the company fully up to date with all funding and HMRC obligations ? | Yes/No. If **no**, please provide details |

|  |  |
| --- | --- |
| Has the company had a “Time to Pay” Arrangement with HMRC over the last two years, including permitted deferrals relating to Covid-19? | Yes/No. If **yes**, please provide details |

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| --- | --- | --- |
| Is your company part of a group? | Yes/No | Parent company name: |
| * Group turnover from latest year end accounts |  | |
| * Group net assets from latest year end accounts |  | |
| * Group employees |  | |

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| --- | --- | --- |
| All companies which are provided with Scottish Enterprise funding will have the opportunity to work with our specialist teams to review their approach to Fair Work. This will include:   * ensuring transparency on the gender pay gap and developing an action plan to close the gender pay gap if appropriate * only using fairly negotiated zero-hour contracts * developing an Invest in Youth policy, which includes setting a target for youth employment as a percentage of the workforce. | Please confirm that you would be willing to work with our teams in these areas? | |
| **Supporting Information** | | |
| **Please include copies of:** |  |  |
| Latest year end financial statements |  |  |
| Management accounts |  |  |
| Aged Creditor/Debtor lists |  |  |
| Supporting information already prepared e.g. business plan and financial forecasts |  |  |
| Parent company accounts if applicable. |  |  |
|  |  |  |
| **Contact Information** | | |
| **Contact details:** | **Applicant** | **Advisor (if applicable)** |
| Contact name |  |  |
| Position |  |  |
| Telephone number |  |  |
| Email address |  |  |
|  |  |  |
| Scottish Enterprise Account Manager/ Business Gateway Advisor (if applicable) |  |  |

**The information provided in relation to this Enquiry may be shared with the Scottish Government**

**PLEASE SUBMIT TO:**

**ScottishLoanScheme@scotent.co.uk**