**ELENA Application Form**

**Energy Projects**

(Sustainable Energy or Residential sector)

The EIB accepts proposals in English and French.

For the application of funding under the ELENA Facility the following form[[1]](#footnote-1) must be used.

**Content of ELENA application form:**

1. Applicant’s identification
2. Applicant’s situation
3. Presentation of the Investment Programme
4. Description of the Project Development Service
5. Overview table: Milestones presentation for measuring leverage factor
6. Estimated cost and finance
7. Declaration by the applicant

* *Note explanation boxes in each section are there for guidance only. The applicant should add further information if it is deemed relevant for the section.*
* *Similarly, the suggested lengths of section in number of pages are there for suggestion only and are not binding constraints.*
* *The references to third parties are only applicable to Residential sector projects.*

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| 1. **Applicant’s identification** | | |
| **Organisation Name** | | *[organization legal name incl. legal form SA, PLC, Ltd, etc. ]* |
| **Main activities** | | *[brief description of the main roles of the applicant, mission]* |
| **Legal Status** | | Please select  *[For a private entity, please provide a justification of your legal existence (e.g. certificate of registration) and profit and loss statement, balance sheet and accompanying notes for the two last, closed financial years.]* |
| **Nature** | | Please select  *If other:*  Please select |
| **Listed company** | | Please select  If yes, percentage of publicly tradable shares: ……% |
| **NACE activity** | | *[*Use *the* [*NACE Codes*](https://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=NACE_REV2&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC&IntCurrentPage=1) *nomenclature*  1-activity 1-letter code + 2-digit sub-activity code*]*   |  |  | | --- | --- | | Activity code | Sub-activity | |  |  | |
| **Address of the applicant** | | |
| **Address** |  | |
| **Zip Code** |  | | |
| **City** |  | | |
| **Country** |  | | |
| **Person in charge of the project** | | |
| **Gender**  (Ms, Mr) |  | | |
| **Title and Function** |  | | |
| **Family Name** |  | | |
| **First Name** |  | | |
| **Telephone No** |  | | |
| **E-mail** |  | | |

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| 1. **Applicant’s situation**   *[~2 pages, plus lists/tables]* |
| **2.1 Description of applicant, type of public authority/public body or private entity**  *(~0.5 page)* *[Describe the type of body e.g. Local, regional or national authority, municipality, public body, publicly owned body, groupings thereof. Present in short the number of person of the team/division presenting the application*  *Describe the applicant’s main responsibilities focusing on those relevant for the ELENA supported Investment Programme]* |
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| **2.2 Have you established a Sustainable Energy Action Plan or similar documents (e.g. climate action plan, national building renovation strategy, energy plan, etc.)?**  **For private** **entities please present the corporate strategy or any relevant document which refers to the planned investments.**  *(~0.25 page)* [*Please provide the title, web links (if available), date and short summary of what the plan aims at achieving.*  *1-2 sentences is sufficient for each]* |
| ***List of plans with short summaries. Please also provide web link if publicly available*** |
| **2.3. Local, regional and national targets relevant for the eligible components of the Investment Programme that are being requested to be supported by ELENA.**  **Please mention if the targets come from any of the above listed plans in Section 2.2**  *(~0.25 page) [These targets relate to those for energy savings, renewable energy source production, greenhouse gas emission reduction targets and any other energy saving or sustainable energy targets]* |
| ***Local targets***  ***Regional targets***  ***National targets*** |
| **2.4 Are you a member of the Covenant of Mayors?**  *(1 line)* [*Yes or No answer is sufficient. If yes, please state since when*] |
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| **2.5 Do you have previous experience with European Commission (EC) funded projects?**  *(table/ list)* [*If yes,* *list the projects where you have acted as a beneficiary of EU support including: the name of the EC support programme, amount of support received, dates, programme purpose, project website. For those involved in many programmes, prioritise the list to include only those relevant for ELENA]* |
| ***List of previous EC programme experience***   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | ***Project name*** | ***EC support programme*** | ***Amount received*** | ***Dates*** | ***Purpose of the programme*** | ***Project website*** | |  |  |  |  |  |  | |  |  |  |  |  |  | |
| **2.6 Experience with implementation of similar investment programmes**  (*table/ list) [If yes, list the investment programmes you have been involved in including: your role, programme size, dates, purpose of the programme, project website]* |
| ***List of previous investment programme experience***   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | ***Programme name*** | ***Role of the beneficiary*** | ***Size of the programme*** | ***Dates*** | ***Purpose of the programme*** | ***Project website*** | |  |  |  |  |  |  | |  |  |  |  |  |  | |
| **2.7 How did you get to know about the existence of the ELENA Facility** |
| ☐ Through professional network  ☐ Visiting the ELENA webpage  ☐ Participating in an event where the ELENA Facility was presented  ☐ Personal contacts  ☐ Other - please specify: |

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| 1. **Presentation of Investment Programme**   *[~6-8 pages, plus tables]* |
| **3.1 Location of the Investment Programme**  *(~0.5 page)* [*Brief overview of the location giving the country(ies), region(s) (NUTS II), municipality(ies) etc.; include population, size, and map if possible]* |
| |  |  |  | | --- | --- | --- | | **Location of the investment** | **Yes / No** | **Precise location** | | Multi-national |  |  | | National |  |  | | Sub-national |  |  | | Regional |  |  | | Municipality |  |  |   ***Overview of location***  ***Map*** |
| **3.2 Role of the applicant and other stakeholders in the Investment Programme**  *(~ 0.5 page) [Briefly describe the role of all stakeholders, including the applicant, in the Investment Programme*  *The inclusion of a simple diagram showing the relationships (e.g. contracts, partnerships, etc.) between all the stakeholders is recommended]* |
| ***Role of the applicant in the Investment Programme***  ***List and role of other stakeholders involved in the Investment Programme***  ***Diagram showing relationship between all parties*** |
| **3.3 Description of the planned Investment Programme, giving details on the eligible components that ELENA is being requested to support**  *(~2 pages plus tables) [Give an overview of the planned Investment Programme (note in some cases the overall Investment Programme is larger than that being supported by ELENA).*  *Technical details can be input in the table templates shown below for some common investments. For any type of investment not shown, just use a similar structure to provide the information]*  *Give details for each project separately (e.g. for 2 district heating projects present them separately).*  *You can delete tables not relevant to your application.]* |
| ***Overview of planned Investment Programme***  *Provide a description of each eligible component that ELENA is being requested to support. This means focusing on the investments that are related to the cost optimal energy efficiency measures, building-integrated renewable energy sources, district heating or a mix of the above.*  *Bear in mind that these components should be presented in such a way that they can be referred back to when outlining the Technical Assistance needs in Section 4.*  ***For Residential sector projects***   * *Please provide a brief description of the relevant market situation for the energy efficiency investments (e.g. current market, policy, drivers, risks, competitors, etc.)* * *Please describe the expected demand and your assumptions on how much of this demand you hope to capture in your investments programme. Outline your assumptions on which your investments programme is based on (e.g. how did you assess the volume of loans that you intend to disburse within the next 3 years?)* * *Please provide an overview of how you intend to deliver this programme (e.g. high-level step by step overview from application to loan disbursement and any foreseen monitoring).* * *For Financial intermediaries (e.g. commercial banks)* ***Please include your criteria of what is required from potential applicants in order to grant an EE related loan e.g. do you require an energy audit that contains details of the energy efficiency measures that can be implemented*** * *Please indicate your previous experience, if any, in financing similar sector investments* * *Expected overall investment cost (not only the loan part), indicating the share of investment dedicated to each component of the programme and in particular the share dedicated to improve the energy performance of the buildings.*   ***Description of each eligible component that ELENA is being requested to support***  ***Technical details - see table template below***  ***Energy Efficiency and RE in buildings:***  *Provide a description of what is proposed under the Investment Programme. Give known technical details in table.*  *Feel free to add other relevant details.*  *🡺 Delete the tables that are not relevant for your project:*   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | ***Energy Efficiency in buildings*** | | ***Details or Value*** | | | | | | | ***For representative building, where available*** | | | | | | | | | *Characteristics* | Floor Area to be retrofitted [m2] |  | | | | | | | Specific energy consumption  before [kWh/(m2a)] |  | | | | | | | Specific energy consumption  expected after [kWh/(m2a)] |  | | | | | | | Energy class of building before |  | | | | | | | Energy class of building expected after |  | | | | | | | Proposed measure | Type of proposed measure |  | | | | | | | **Summary of buildings** | | | | | | | | | *Characteristics* | Total number of buildings  to be retrofitted |  | | | | | | | Total Floor Area retrofitted [m2] |  | | | | | | | *Energy consumption* | Breakdown of energy consumption by energy use in the buildings (e.g. heating, cooling, lighting, domestic hot water, etc.) [MWh/%] | Heating | Cooling | Lighting | Hot water | Appliances | Other | |  |  |  |  |  |  | | ***Describe each proposed measure*** | Envelope insulation |  | | | | | | | Windows |  | | | | | | | HVAC |  | | | | | | | Lighting |  | | | | | | | etc. |  | | | | | |  |  |  |  | | --- | --- | --- | | ***PV in buildings*** | | ***Details or Value*** | | *Characteristics* | Number and Type of PV panels |  | | Surface of PV panels installed [m2] |  | | Total expected capacity [kWp] |  | | *Energy output* | Specific energy output expected [kWh/kWp] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of boilers in buildings*** | | ***Details or Value*** | | *Characteristics* | Number, type and efficiency of new boilers |  | | Number, type and efficiency of old boilers |  | | Total expected new capacity [kW] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of HVAC systems in buildings*** | | ***Details or Value*** | | *Characteristics* | Number, type and efficiency of new HVAC systems |  | | Number, type and efficiency of old HVAC systems |  | | Total expected new capacity [kW] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of lighting systems in buildings*** | | ***Details or Value*** | | *Characteristics* | Number, type and efficiency of new lighting systems |  | | Number, type and efficiency of old lighting systems |  | | Total expected new capacity [kW] |  |   ***Energy Efficiency in street lighting***  *Provide a description of what is proposed under the Investment Programme. Give known technical details in table. Feel free to add other relevant details.*   |  |  |  | | --- | --- | --- | | ***Energy Efficiency in street lighting*** | | ***Details or Value*** | | *Characteristics* | Number of lighting points retrofitted |  | | Installed capacity before energy efficiency measures [MWel] |  | | Installed capacity expected after energy efficiency measures [MWel] |  | | Specific average luminous efficacy before [lm/W] |  | | Specific average luminous efficacy expected after [lm/W] |  | | *Energy consumption* | Specific average energy consumption before [kWh/(lamp/a)] |  | | Specific average energy consumption expected after [kWh/(lamp/a)] |  | | *Details on measures* | Measures  (e.g. whole post replaced/upgraded; lighting fittings only, dimming etc.)  Outline the energy saving measures to be implemented |  |   ***District heating***  *Provide a description of what is proposed under the Investment Programme. Give known technical details in table.*  *Feel free to add other relevant details.*   |  |  |  | | --- | --- | --- | | *District heating* | | *Details or Value* | | *New or replacement* | Outline of new network or replacement works |  | | *Characteristics of the heat source:* | Fuel to be used |  | | (Old Fuel used, if applicable) |  | | Generation capacity [MWth] |  | | Efficiency [%] |  | | *Demand* | Size and details of clients connected / to be connected |  | | *Lines* | Length of transmission lines [km] |  | | Length of distribution lines [km] |  | | *Heat price and heat supply* | Average cost of current heat tariff [EUR/MWh] |  | | Expected future energy heat tariff for customer [EUR/MWh] |  | | Annual heat production [MWhth] |  | | Annual heat sold [MWhth] |  |   ***Smart Grid***  *Provide a description of what is proposed under the Investment Programme. Give known technical details in table.*  *Feel free to add other relevant details.*   |  |  |  | | --- | --- | --- | | ***Smart Grid*** | | ***Details or Value*** | | *Characteristics* | Capacity of any new small scale generation units [MW] |  | | Type of any new small scale generation units |  | | Expected annual energy production [MWh] |  | | New meters |  | | Demand connected/to be connected [MW] |  | | Energy demand side management expected (in MW and in MWh) |  | | Energy Storage options |  | | Control centre options |  | |
| **3.4 Description of the approach to implement the Investment Programme, including the proposed procurement plan**  *(~1-2 pages) [Focusing on the components that ELENA is being requested to support, present the main steps that will be taken to implement the Investment Programme and give an explanation of what needs to be done at each stage.]* |
| ***Main implementation steps, including the main decision-making steps and parties***  *Identify the relevant decision making parties and explain the different decision making steps that need to happen in order that the Investment Programme is implemented (e.g. is there oversight by a Steering Committee; mention if any one party/group of parties have a final decision making role).*  ***Proposed delivery mechanisms***  *Describe the proposed delivery mechanisms (e.g. if an ESCO or other party be involved).*  ***Proposed Procurement plan, including expected timeframe***  *Please also outline the type of planned procurement (e.g. what is expected to be tendered out, the total number of tenders foreseen, estimated timeframe, estimated size of each tender, type of tendering process etc.).*  *Please confirm all hiring will be done in accordance with EU/ national procurement regulations (if applicable).*  ***Monitoring and/or quality assessment procedures***  *Describe any monitoring and/or quality assessment procedures that are planned.* |

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| **3.5 Expected overall investment cost, indicating the share of investment dedicated to each component of the programme and the specific costs**  *[Give information on how the payback period has been calculated]* |
| *🡺 Delete the tables that are not relevant for your project:*  ***Summary*** *(list of individual investment programme components from below)****:***   |  |  |  |  | | --- | --- | --- | --- | | **Investment component** | **Total Investment cost (EUR)** | **% of total investment cost** | **Simple payback period** | |  |  |  |  |   ***Cost of individual investment programme components:***   |  |  |  | | --- | --- | --- | | ***Energy Efficiency in buildings*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost [EUR/ m2] |  | | Estimated cost of each measure to be implemented [EUR] | Envelope insulation | | Windows | | HVAC | | Lighting | | Other | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***PV in buildings*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost [EUR/kWp] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of boilers in buildings*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost [EUR/ kW] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of HVAC systems in buildings*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost [EUR/ kW] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***Replacement of lighting systems in buildings*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost [EUR/ kW] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***Energy Efficiency in street lighting*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost per lamp [EUR/lamp] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***District heating*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected average cost per linear meter installed pipeline [EUR/m] |  | | Simple payback period [years] |  |  |  |  |  | | --- | --- | --- | | ***Smart Grid*** | | ***Details or Value*** | | *Investment Cost* | Overall expected cost [EUR] |  | | Expected cost per Smart grid component [EUR/component] |  | | Simple payback period [years] |  | |
| **3.6 Preliminary financing plan for the Investment Programme**  *(~0.5 page)[Provide the current financing plan covering the expected Investment Cost outlined above. It is understood that not all financing arrangement will be in place at this time.]* |
| ***Preliminary Financing plan***  ***Summary:***   |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Total Investment cost**  **(EUR)** | **Investment costs financed by ESIF[[2]](#footnote-2)**  **(%)** | **Investment costs financed by equity[[3]](#footnote-3)**  **(%)** | **Investment costs financed by debt[[4]](#footnote-4)**  **(%)** | **European Funds for Structural Investment (EFSI) or InvestEU[[5]](#footnote-5)**  **(%)** | **Investment costs financed by ESCO/EPC[[6]](#footnote-6)**  **(%)** | **Investment costs financed by 3rd party financing[[7]](#footnote-7)**  **(%)** | **Investment costs financed by other grants/subsidies/tax rebates[[8]](#footnote-8)**  **(%)** | **Investment costs financed by other energy supplier obligations[[9]](#footnote-9) (%)** | |  |  |  |  |  |  |  |  |  | |
| **3.7 Information on subsidies or grants received or to be received for the planned Investment Programme**  *(~0.5 page) [if applicable]* |
| ***List of subsidies or grants available for the investor*** |
| **3.8 Preliminary implementation timetable for the Investment Programme**  *[Give the expected start and end-date of each component of the Investment Programme, and major milestones and decisions points for the program. Note that this does not have to be in line with the ELENA supported period as actual implementation may take longer.]* |
| |  |  |  | | --- | --- | --- | | **Investment component** | **Expected start date** | **Expected end date** | |  |  |  |   *For each of the investment component please provide the estimated date when you expect the investment tender to be published or an investment contract to be signed. Please be aware that those aggregated components can be referred back to when outlining the Estimated total costs (of energy saving investment measures) in Overview table: Milestones presentation for measuring leverage factor.*   |  |  |  | | --- | --- | --- | | **Milestones** | **Investment component**  **In unit numbers** | **Investment component**  **In investment costs** | | **Planned to be achieved after 12 months** |  |  | | **Planned to be achieved after 24 months** |  |  | | **Planned to be achieved after 36 months** |  |  | |
| **3.9 Main foreseen risks that could affect the implementation of the Investment Programme and risk mitigation measures planned**  *(~0.5 page)**[Examples of risks include regulatory or legal issues, upcoming elections, financing risks, demand risks, required approval risks, not getting required expertise etc.]* |
| ***Main foreseen risks and mitigation measures*** |
| **3.10 Please outline the expected results in terms of increases energy savings, renewable energy production and reduction of greenhouse gas emissions**  [*Estimation requested in absolute annual figures at final energy level (e.g. GWh purchased or generated divided up according to electric or thermal energy and according to which kind of fuel used and saved) before and after implementation of Investment Programme*. *Please see table below for a suggested template showing the various potential Investment Programme components. Applicants should feel free to add to these components and indicators if there are others used]*  *(The calculation of the CO2 emission reduction will be done by the ELENA team based on the EIB’s Project Carbon Footprint Methodologies (link to the guide :* [*https://www.eib.org/attachments/strategies/eib\_project\_carbon\_footprint\_methodologies\_en.pdf*](https://www.eib.org/attachments/strategies/eib_project_carbon_footprint_methodologies_en.pdf)*)*  *(In case of needs the ELENA team can give support for preparing this table)* |
| **Summary table:**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Physical impact of planned investment programme** | **Energy  (at final energy level)** | | | | |  | **Before** | **After** | **Delta** | **Savings** | |  | **in GWh** | **in GWh** | **in GWh** | **in %** | | **Energy savings** | | | | | | Electricity |  |  | 0 | - | | Thermal energy, Natural gas |  |  | 0 | - | | Thermal energy, LPG |  |  | 0 | - | | Thermal energy, Gas/Diesel Oil |  |  | 0 | - | | Thermal energy, Hard coal |  |  | 0 | - | | Thermal energy, District heating network XYZ |  |  | 0 |  | | Thermal energy, Other (please specify) |  |  | 0 | - | | **Sub-total** | **0** | **0** | **0** | **-** | |  | | | | | | **RES generation** | | | | | | RES Electricity |  |  | 0 |  | | RES thermal energy, replac. Natural gas |  |  | 0 |  | | RES thermal energy, replac. LPG |  |  | 0 |  | | RES thermal energy, replac. Gas/Diesel Oil |  |  | 0 |  | | RES thermal energy, replac. Hard coal |  |  | 0 |  | | RES thermal energy, DH network XYZ |  |  | 0 |  | | **Sub-total** | **0** | **0** | **0** | **-** |   **Summary table per investment component**   |  |  |  |  | | --- | --- | --- | --- | | **Investment component** | **Final energy consumption**  (GWh/year) | | | | **before** | **after** | **savings** | | **Buildings** |  |  |  | | **Public lighting** |  |  |  | | **District heating** |  |  |  | | **Other** |  |  |  | | **RES generation**  **electricity** | **0** |  | **0** | | **RES generation thermal energy** | **0** |  | **0** | | **TOTAL** |  |  |  | |
| **3.11 Other expected relevant results, if available**  (~0.5 page) [*Examples include increased* *capacity building, air quality, improved street lighting etc*.] |
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| **3.12 Description of previous preparatory assessments and studies carried out for the Investment Programme, if available**  *(~0.5-1 page)* [*If possible, please attach summaries of previous assessments/studies]* |
| ***Name and summary of study 1***  ***Name and summary of study 2***  ***Etc.*** |

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| 1. **Description of the requested assistance from ELENA**   *[3-4 pages, plus tables]* |
| **4.1 Name of ELENA operation** |
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| **4.2 Indicative work programme for the technical assistance ELENA activities to prepare the Investment Programme**  *(~1-2 pages) [Please present each required technical assistance activity and the expected outcome from each activity (e.g. typical technical assistance activities include energy audits, feasibility studies, procurement preparation, required expertise etc.).*    *Describe how the expected outcome from each activity is expected to prepare the Investment Programme activities as described in Section 3. There can be overlaps as one ELENA activity may contribute to more than one investment project]*  *Please include a description of any third party bodies that may be involved.* |
| **Activities to be performed by the Direct Staff (function by function):**  **Please describe the activities to be performed by the External Staff (subcontractors) and summarise these activities in the following table:**   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **Technical assistance activity** | **Investment component being supported** | **Details of how Technical assistance activity will support Investment component** | **Deliverables** | **Expected Person-days** | **Daily rates** | **Amount**  **In EUR** | |  |  |  |  |  |  |  |   ***Please describe the parties or types of parties that you will be working with to prepare the investment programme e.g. energy auditors/contractors/ESCOs that will be used to carry out energy audits or to provide technical advice to clients:*** |
| **4.3 Description of the existing or planned structure/organisation of the ELENA supported staff and any third parties who are managing the preparation of the Investment Programme**  *(~0.5 page) [Describe how the ELENA funded staff will be organised e.g. explain if they will be part of an existing organisation or if a new structure is being created (e.g. a Project Implementation Unit composed of ELENA funded staff) to manage the ELENA supported technical assistance.*  *Describe the decision makers and any approvals that are required from the different parties.*  *Please provide an organisational chart showing how all the parties interact]* |
| ***Organisational structure diagram***  ***Description of each party involved and their roles and interaction*** |
| **4.4 Planned procurement plan for staff and services to be financed with ELENA funding**  *(~0.5 page) [Please outline the type of planned procurement for the hiring of new staff funded under ELENA (e.g. what positions are expected to be tendered out, the total number of tenders foreseen, estimated timeframe, estimated size of each tender, type of tendering process etc.);*  *Please confirm all hiring will be done in accordance with EU/ national procurement regulations]* |
| ***Procurement procedures relevant for the country of application***  ***Planned procurement plan for ELENA funded staff and external expert services, if relevant***   |  |  | | --- | --- | | **Technical assistance activity** | **Type of procurement to be used** | |  |  | |
| **4.5 Indicative start date of the ELENA assistance and implementation timetable for the Project Development Services (including milestone setting after first, second and third year)** |
| ***Expected Start date of ELENA***  ***Implementation timetable and milestones***  *Indicative implementation timetable for the Project Development Services, indicating the link between the Project Development Services and the Investment Programme and including the deliverables presented in the section 4.2 and making reference to the milestones (e.g. after first year, second year and third year).*   |  |  |  | | --- | --- | --- | | **Milestones** | **PDS activity** | **PDS deliverables (e.g. number energy audits finalised etc.)** | | **Planned to be achieved after 12 months** |  |  | | **Planned to be achieved after 24 months** |  |  | | **Planned to be achieved after 36 months** |  |  | |
| **4.6 Please justify your request for assistance for ELENA**  *(~0.5 page) [Please explain how the technical assistance from ELENA is providing an additional benefit to the Investment Programme preparation e.g. is ELENA adding to what is currently existing (e.g. going beyond business as usual), such as allowing hiring of extra staff and external expertise or financing studies that need to be carried out, will ELENA allow programme to be realised faster; etc.]* |
| ***Justification for ELENA facilitating more than “business as usual”*** |
| **4.7 Indicate the requested funding from ELENA Facility and present the other funding sources**  *[in EURO; maximum ELENA participation is 90%]* |
| |  |  | | --- | --- | | ***Total eligible costs for project development services:*** | ***EUR*** | | ***Requested ELENA funding:*** | ***EUR*** | | ***Own funding:*** | ***EUR*** | | ***Other sources:*** | ***EUR*** | |
| **4.8 Applicants commitment to facilitate dissemination of experiences and results**  *(~0.5 page) [Please describe methods you will use to ensure that the lessons learnt through ELENA support can be shared with other interested parties e.g. conferences, workshops, publications, shared experience with other counterparts etc.]* |
|  |
| **4.9 Are you planning or have you already requested financial support for the preparation phase of your Investment Programme from one of the following EU programmes?** |
| ☐ ERDF (European Regional Development Fund) / Cohesion funds  ☐ JASPERS (Joint Assistance to Support Projects in European Regions)  ☐ IPA (Instrument for Pre-Accession Assistance)  ☐ Other EU financed programmes  If other, please give the name: |

1. **Overview table: Milestones presentation for measuring leverage factor (cumulative values)**

*(In case of needs the ELENA team can give support for preparing this table)*

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Reporting time**  (end of year) | **Estimated budget**  **Project Development Services** | | | | **Milestones for Investment Programme implementation**  (indicate here the part of the total Investment Programme which is planned to be launched at the indicated reporting time) | | | | | | **Cumulative Leverage factor** |
|  | **Staff costs**  **[in EUR]** | **External experts /**  **subcontracts**  **[in EUR]** | **Third parties**  (Residential sector only)  **[in EUR]** | **Annual**  **Sub-total**  **[in EUR]** | **Short description**  **of area,**  **technologies concerned[[10]](#footnote-10)** | **Identification of investor[[11]](#footnote-11)** | **Estimated total costs (of energy saving investment measures)**  **[in EUR]** | **Estimated annual final energy saved**  **for EE projects****[[12]](#footnote-12)**  **[in GWh]** | **Estimated annual final energy production by RES12**  **[in GWh]** | **Estimated annual reduction**  **of CO2eq**  **[in t]** | **(Estimated total costs)**  **/**  **(0.9 x Annual Sub-total)** |
| **Year 1** |  |  |  |  |  |  |  |  |  |  | *(Estimated total costs year 1)*  */ (0.9 x Annual Sub-total year 1)* |
| **Year 2** |  |  |  |  |  |  |  |  |  |  | *(Estimated total costs year 1+ year 2)*  */ (0.9 x (Annual Sub-total year 1 + Year 2))* |
| **Year 3** |  |  |  |  |  |  |  |  |  |  | *(Estimated total costs year 1+ year 2+ year 3) / (0.9 x (Annual Sub-total year 1 + Year 2 + year 3))* |
| **TOTALS[[13]](#footnote-13)** |  |  |  |  |  |  |  |  |  |  | *(same as leverage factor for year 3)* |
| **Interim report (month 18)** |  |  |  |  |  |  |  |  |  |  | *Estimated total costs month 18)*  */ (0.9 x Annual Sub-total month 18)* |

1. **Estimated costs and funding of project development services**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Direct staff costs** | | | | | | |
| Categories of staff to work on the project (e.g. senior expert, expert, junior expert; project assistant etc.) | | | Monthly salary (EUR) | | Number of work months on project | Direct Staff costs (EUR) |
| **(A)** | | **(B)** | **(A x B)** |
|  | | |  | |  |  |
|  |  | |  | |  |  |
|  | | |  | |  |  |
| **Total direct staff costs** | | |  | | |  |
| **External experts / subcontracts** | | | | | | |
| **Type of activities / support** | | | Expected Person-days (days) / Expected number of items\* | | Expected daily rates /  Expected cost per item\* (EUR) | Total (EUR) |
| **(A)** | | **(B)** | **(A x B)** |
|  | | |  | |  |  |
|  | | |  | |  |  |
|  | | |  | |  |  |
| **Subtotal external experts / subcontracts** | | | | | |  |
|  | | | | | | |
| **Financial Support paid to Third Party/ies** | | | | | | |
| **Type of activities / Third Party name** | | **Description of tasks to be carried out** | | | | **Total [EUR]** |
|  | |  | | | |  |
|  | |  | | | |  |
|  | |  | | | |  |
| **Subtotal Third Party** | | | | | | **0** |
| **ESTIMATED TOTAL ELIGIBLE COST** | | | | | | |
| **Direct staff costs** | | | | | |  |
| **External experts / subcontracts** | | | | | |  |
| **Third party financing** | | | | | |  |
| **TOTAL eligible costs [in EUR]** | | | | | |  |
| **FUNDING** | | | | | | |
| **Requested funding from ELENA Facility [in EUR]; maximum 90%** | | | | **in%** | |  |
| **Own funding [in EUR]** | | | | **in%** | |  |
| **Other sources [EUR]** | | | | **in%** | |  |
| **TOTAL funding [in EUR]** | | | | | |  |
| * For more information on eligible costs under the ELENA funding, please refer to our FAQ § 1.7:   <https://www.eib.org/attachments/documents/elena_faq_en.pdf>   * The total budget initially accepted at the start of the project cannot be increased. Overspending must be taken over by the beneficiary. | | | | | | |

\* For example: number of expected energy audits and expected cost per energy audit

1. **Declaration by the applicant**

Please use the standard “Declaration by the Applicant” that can be downloaded at: [www.eib.org/elena](http://www.eib.org/elena)

**Submission date of the Application:**

(dd/mm/yyyy)

**Name:**

**Signature:**

1. As an indication, chapters 3-5 could be presented in a sufficient way on around 10 pages [↑](#footnote-ref-1)
2. Financing provided by ESIF [↑](#footnote-ref-2)
3. Own financing sources [↑](#footnote-ref-3)
4. Financing provided by banks and other financial institutions (shall exclude the financing included in the following footnote) [↑](#footnote-ref-4)
5. Financing provided by the EIB under EFSI or InvestEU [↑](#footnote-ref-5)
6. Financing provided by ESCOs [↑](#footnote-ref-6)
7. Financing provided by other third parties than ESCOs, banks or financial institutions (e.g. crowdfunding) [↑](#footnote-ref-7)
8. Financing provided by national support schemes, namely grants, subsidies and tax rebates [↑](#footnote-ref-8)
9. Financing provided by energy efficiency obligations, as described in the Energy Efficiency Directive [↑](#footnote-ref-9)
10. Specifying which main area concerned (i.e. EE in residential buildings, EE in non-residential buildings, RES, street lighting, district heating and/or smart grids) [↑](#footnote-ref-10)
11. Indicate the final investor, the one who will order the work to be carried out [↑](#footnote-ref-11)
12. Indicate the main type of energy saved or produced (thermal or electrical) [↑](#footnote-ref-12)
13. Total of estimated budget should be the same as in budget table or in Investment Programme presentation [↑](#footnote-ref-13)