
Changes to legislation: There are outstanding changes not yet made to Commission Implementing Regulation (EU) 2020/1001. Any changes that have already been made to the legislation appear in the content and are referenced with annotations. (See end of Document for details) [View outstanding changes](#)

ANNEX I

Information about investment proposal to be submitted to the EIB and to the Investment Committee

1. **All investment proposals**
 - 1.1. specification of the investment area in accordance with Article 10d(1) or (2) of Directive 2003/87/EC, as appropriate;
 - 1.2. general description of the investment, including the objectives and targeted beneficiary(ies), technology (if relevant), capacity (if relevant), and estimated duration of the investment;
 - 1.3. justification for the Modernisation Fund support, including the confirmation of the compliance of an investment with Article 10d(1) of Directive 2003/87/EC;
 - 1.4. specification of costs to be covered from the Modernisation Fund;
 - 1.5. description of the support instrument(s) used;
 - 1.6. requested amount of the financing from the Modernisation Fund;
 - 1.7. contribution(s) from other Union and national instruments;
 - 1.8. existence of State aid (within the meaning of Article 107(1) of the Treaty), and indication of the following, as applicable:
 - (a) reference to the Commission decision clearing national aid measure;
 - (b) reference under which the block-exempted measure has been registered (State aid number attributed by the Commission's electronic notification system referred to in Article 11 of Regulation (EU) No 651/2014);
 - (c) expected date for notification of the aid measure to the Commission;
 - 1.9. Member State's declaration of compliance with the applicable Union and national laws;
 - 1.10. when the investment aims at implementation of a territorial just transition plan, information about the expected contribution of the investment to that plan.
2. **Additional information about schemes**
 - 2.1. name of the managing authority;
 - 2.2. indication whether the proposal concerns an existing scheme;
 - 2.3. total volume of the scheme.
3. **Additional information about proposals other than schemes**
 - 3.1. name of the project proponent;
 - 3.2. location of the project;
 - 3.3. total investment costs;
 - 3.4. development stage of the project (from feasibility to operation);
 - 3.5. list of mandatory permits obtained or to be obtained.

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4. **Additional information about non-priority proposals**

- 4.1. quantitative data on the construction and operation phases, including proposal's contribution to the objectives of the Modernisation Fund, the Union's 2030 climate and energy policy framework and the Paris Agreement;
- 4.2. certified financial forecast, including intended financial contribution from private sources;
- 4.3. description of any other targeted performance indicator, as requested by the EIB;
- 4.4. other relevant information related to the project proponent, the investment, the general market conditions and environmental issues.

ANNEX II

Information to be provided by the beneficiary Member State in the annual report to the Commission

1. **Overview of investments**

- 1.1. number of investments financed from the Modernisation Fund to date;
- 1.2. number of on-going, completed and discontinued investments;
- 1.3. overall ratio of the financing provided to priority investments against non-priority investments, if any, in the beneficiary Member State.

2. **Information on each investment**

- 2.1. total investment triggered (total investment costs);
- 2.2. dates and amounts of payments from the Modernisation Fund to the project proponent or the scheme managing authority;
- 2.3. amounts received from the Modernisation Fund by the beneficiary Member State but not yet paid to the project proponent or the scheme managing authority;
- 2.4. any amounts recovered by the beneficiary Member State from the project proponent or the scheme managing authority, and the dates of recovery;
- 2.5. an assessment of the added value of the investment in terms of energy efficiency and modernisation of the energy system, including information on the following:
 - (a) the energy saved in MWh;
 - (b) expected cumulative MWh saved by the end of the investment lifetime;
 - (c) the greenhouse gas emissions saved in tCO₂;
 - (d) expected cumulative tCO₂ saved by the end of the investment lifetime;
 - (e) the additional renewable energy capacity installed, if applicable;
 - (f) achieved leverage of funds (total amount invested in relation to the contribution from the Modernisation Fund);

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- 2.6. when the investment aims at implementation of a territorial just transition plan, information about the expected contribution of the investment to that plan.
- 2.7. for schemes, the reporting data specified shall be presented in aggregated form.
3. **Additional information about investments other than schemes**
 - 3.1. milestones achieved since the previous annual report;
 - 3.2. expected entry into operation;
 - 3.3. identified or expected delays in implementation;
 - 3.4. identified or expected changes in eligible costs, technology applied or results of an investment.
4. **Additional information about non-priority investment**
 - 4.1. confirmation of co-financing from private sources.

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Changes and effects yet to be applied to :

- [Regulation revoked by 2023 c. 28 Sch. 1 Pt. 2](#)