

Invest NI Energy Efficiency Capital Grant Scheme

Guidance notes for applicants



Overview

This document provides guidance for the Energy Efficiency Capital Grant (EECG). It covers eligibility criteria, application process and information required. If you are considering applying for the EECG, please read this document carefully before submitting your application.

This scheme will operate continuously over a 5-year period or until all funding is allocated. The first funding year (2024-25) of EECG is funded by the UK government through the UK Shared Prosperity Fund. The remaining four years are funded by Invest Northern Ireland.

Invest Northern Ireland (Invest NI) has launched the EECG to help Northern Ireland businesses reduce energy costs and build resilience through green efficiency. The EECG provides grant support for the purchase and installation of energy efficient equipment that reduces the use of energy and carbon emissions.

Examples of energy efficiency projects that will be considered for the EECG include:

- Heating and cooling equipment
- Motors and drives
- Manufacturing or processing
- Lighting
- Onsite renewable generation

The EECG is a reimbursement grant, managed and administered by Invest NI.

The aim of this funding is to encourage businesses to reduce energy consumption, cost, and carbon emissions by installing equipment that will result in energy efficiency and/or carbon savings by providing a capital grant of up to £150,000.

Grant support will depend on business size and turnover according to De-Minimis Aid and UK Subsidy guidelines and a proportionate appraisal. (See Appendix A).

Up to 3 projects can be included within one application. The maximum grant per application each company is entitled to claim is £150k. A Letter of Offer will be issued to successful applicants, who may begin to implement the project.

EECG is a reimbursement grant; the applicant must complete the project and pay the costs in full. They can then submit their claim for reimbursement. When Invest NI confirms the project is complete the eligible grant amount be paid to the applicant.

Only one entity within a group structure of companies can apply for EECG at any one time.

Companies are limited to 2 applications across a 5-year period and there must be a minimum of 2 years between applications. (Invest NI reserves the right to amend this based on funding availability).

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These guidance notes have been developed to provide details on eligibility criteria and are split into the following sections:

1. Business eligibility
2. Maximum grant
3. Project eligibility
4. How to apply (including timescales)
5. Assessment process
6. Submitting a claim

1. Business eligibility

Invest NI is limited to providing support to organisations that are engaged in industry, business and commerce. As part of the EECG application process, you must provide evidence to Invest NI of business eligibility. To be eligible for this support you must provide evidence of the criteria below:

- Have been trading for at least 2 years.
- Be a registered business trading in Northern Ireland (e.g., Companies House Registration or HMRC Registration).
- The premises where the project will be implemented is registered for business rates with Land and Property Services (property type - non domestic). This can be checked at the following link: <https://valuationservices.finance-ni.gov.uk/Property/Search>
- For businesses that do not own their premises, a Rental Agreement must be in place for the premises where the energy efficiency technology will be implemented. The length of time remaining on the Rental Agreement must be greater than the payback period of your project.
- A copy of 2 years audited accounts. If these are not available, please advise why they are not available and provide a copy of your unaudited accounts or recent management accounts covering the last 2 financial years.
- Information on your business, such as details on the number of employees and your turnover.
- More detailed information may be requested in addition to the above.

It is important that in the administration of public funds that Invest NI is diligent in its checks and knows sufficient detail about the applicant before proceeding with an offer of financial support. The business eligibility process will review the following:

- Photographic ID & identity documentation.
- Credit check on the applicant and named company individuals and the company itself.
- Information provided in your application form to confirm it is aligned to publicly held information and is not misleading.
- Your business and any member of senior management within the business are not subject to a current bankruptcy order, Individual Voluntary Arrangement, Company Voluntary Arrangement (CVA), County Court Judgement, or Company Director Disqualification.
- You (the applicant) are not currently involved in a CVA either through the applicant company or a linked company.

We will complete a credit check, searches on Companies House, web searches and any other due diligence that is required to satisfy our business eligibility process.

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If misleading information or elevated risk factors are found in your application, Invest NI reserves the right to escalate such matters to its Senior Management Team for review and it will issue a final decision on whether to proceed with your application.

Non-eligible businesses

Invest NI is limited to providing support to organisations that are engaged in industry, business and commerce.

The following businesses are not eligible to apply:

- Organisations whose activities are by their nature sporting, social or charitable.
- Health care providers delivering core services on behalf of the NHS or health trusts.
- Education – Schools, higher and further education.
- Franchises which are not autonomous enterprises as defined by [Commission Recommendation 2003/361/EC](#)
- Businesses involved in primary agricultural production, fisheries, and aquaculture (production and processing), steel, coal, shipbuilding, synthetic fibres, transport and its infrastructure, energy generation, distribution and infrastructure.
- Businesses that are fully or part funded by government.
- Businesses already in receipt of or intending to gain other government support for the project.
- Businesses that have an outstanding liability to Invest NI brought about through grant clawback proceedings. If a satisfactory repayment plan is in place, the business may apply for consideration.
- Businesses or any member of senior management within the business that are subject to a current bankruptcy order, Individual Voluntary Arrangement, Company Voluntary Arrangement, County Court Judgement, or Company Director Disqualification.
- Industries or businesses which may cause Invest NI unacceptable reputational risk, such as gambling, tobacco products, cannabis-based products which are not authorised as medicines, adult entertainment.
- Government organisations and bodies and government funded bodies.
- Government part owned/supported businesses.
- Invest NI reserves the right at its absolute discretion to refuse to support businesses that bring Invest NI, the Department for the Economy or the Minister for the Department for the Economy into disrepute.

This scheme operates under [Article 3 of the Energy Efficiency \(Northern Ireland\) Order 1999](#)

2. Maximum grant

The rate of support is dependent on company size, as per State Aid rules, (see Appendix A):

1. Small company:

For a small company, the grant rate will not exceed 50% of eligible project costs, up to a maximum of £150,000 in grant support per application.

2. Medium company:

For a medium company, the grant rate will not exceed 40% of eligible project costs, up to a maximum of £150,000 in grant support per application.

3. Large company:

For a large company, the grant rate will not exceed 30% of eligible project costs, up to a maximum of £150,000 in grant support per application.



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Subsidy control and state aid

Invest NI's Energy Efficiency Capital Grant Scheme provides financial assistance in accordance with the [UK's Subsidy Control Act 2020](#) or, where such financial support could affect the trade in goods between Northern Ireland and the EU, in line with [Commission Regulation \(EU\) 2023/2831 – the de minimis aid regulation](#).

The maximum amount of de minimis aid a company can receive in any period of three years is €300,000. If EECG support results in a breach of this ceiling or there is any contravention of de minimis or State Aid rules, irrespective of whether this was a deliberate or otherwise deception or error, or as a result of any misleading statements given on the application, this grant will be recoverable in full and may be subject to legal action.



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3. Project eligibility - Your project will be eligible if it meets criteria 1, 2 either 3a, 3b, 3c or 3d.																					
Criteria 1: Eligible project spend	Your application has a total eligible project(s) combined spend of at least £4,000 (excluding VAT) .																				
Criteria 2: Project implementation	You can fully implement your project , including the full installation of equipment, payment of costs in full and submission of your grant claim to Invest NI.																				
Criteria 3: Payback, energy and carbon savings Projects must meet one of the following from this section: <ul style="list-style-type: none"> Criteria 3a Criteria 3b Criteria 3c Criteria 3d 	<p><u>Energy efficiency projects</u></p> <p>Criteria 3a: Your project can achieve the following payback, energy and carbon savings:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr style="background-color: #d9ead3;"> <th style="width: 33%;">Payback</th> <th style="width: 33%;">Energy savings</th> <th style="width: 33%;">Carbon savings</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1 – 8 years</td> <td style="text-align: center;">≥ 25%</td> <td style="text-align: center;">≥ 25%</td> </tr> </tbody> </table> <p><i>Note, for payback period, this should be a simple financial payback (before any grant is applied) based on <u>energy cost savings achieved on-site</u>.</i></p> <p>Criteria 3b: Your project can achieve the following payback, energy and carbon savings:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr style="background-color: #d9ead3;"> <th style="width: 33%;">Payback</th> <th style="width: 33%;">Energy savings</th> <th style="width: 33%;">Carbon savings</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">8 – 10 years</td> <td style="text-align: center;">≥50%</td> <td style="text-align: center;">≥50%</td> </tr> </tbody> </table> <p><i>Note, for payback period, this should be a simple financial payback (before any grant is applied) based on <u>energy cost savings achieved on-site</u>.</i></p> <p><u>Renewable energy projects</u></p> <p>Criteria 3c: Your project can achieve the following payback and carbon savings:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr style="background-color: #d9ead3;"> <th style="width: 50%;">Payback</th> <th style="width: 50%;">Carbon savings</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1 – 8 years</td> <td style="text-align: center;">≥ 10%</td> </tr> </tbody> </table> <p><i>Note, for payback period, this should be a simple financial payback (before any grant is applied) based on <u>energy cost savings achieved on-site, export payments should not be included</u>.</i></p> <p>Criteria 3d: Your project can achieve the following payback and carbon savings:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr style="background-color: #d9ead3;"> <th style="width: 50%;">Payback</th> <th style="width: 50%;">Carbon savings</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">8 – 10 years</td> <td style="text-align: center;">≥ 50%</td> </tr> </tbody> </table> <p><i>Note, for payback period, this should be a simple financial payback (before any grant is applied) based on <u>energy cost savings achieved on-site, export payments should not be included</u>.</i></p>	Payback	Energy savings	Carbon savings	1 – 8 years	≥ 25%	≥ 25%	Payback	Energy savings	Carbon savings	8 – 10 years	≥50%	≥50%	Payback	Carbon savings	1 – 8 years	≥ 10%	Payback	Carbon savings	8 – 10 years	≥ 50%
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Points to note for projects:

- All expenses must be linked to the business (e.g., business must be covering all energy bills).
- For businesses who do not own their premises and have a rental agreement in place, the length of time remaining on the rental agreement must be greater than the payback period of your project.
- Written consent should be provided from the landlord to complete the project where the project includes structural or external alternations of the business premises. These projects will be assessed on a case-by-case basis.
- Clawback procedures will be implemented where projects are not agreed/permited by the landlord. If the project is stopped/removed, support must be paid back in full to Invest NI.

Three energy efficiency projects can be included in one application as long as each project fulfils the eligibility criteria and total combined spend for the multiple projects is at least £4,000 (excluding VAT). All projects must be located at one site.

Projects that can complete prior to March 2025 will be prioritised.

Eligible projects

Eligible projects, based in Northern Ireland, can use the EECG to contribute toward the costs of energy efficient technologies such as:

Heating and cooling

- Heating systems – electrification of heating
- Air source heat pump and ground source heat pump
- Recirculation – destratification fans
- Heat exchanger

Building fabric

- Building energy management systems (including sensors and controls)
- Building insulation (projects will be eligible only if upgraded to at least the current building regulations for non-domestic new builds)
- Energy efficient glazing (projects will be eligible only if upgraded to at least the current building regulations for non-domestic new builds)
- Process and pipe insulation

Manufacturing and processing

- Energy efficient manufacturing equipment and clean technology
- Variable speed motor
- Compressed air systems, compressors, piping, distribution etc
- Refrigeration equipment
- Auxiliary equipment – extractor fans, conveyors etc
- Industrial heating, cooling, /recovery

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Lighting

- Low energy lights (LEDs)
- Lighting controls – sensors and PIRs

Renewables projects

- Battery storage equipment for renewable energy storage
- Solar PV

Other

- Other energy efficiency measures and innovations (these projects will be assessed on a case-by-case basis).

Points to note:

- This technology list will be reviewed on an annual basis and updated as necessary with additions for new technology advances or, removals where technology has become obsolete.
- Eligible costs are the capital costs directly associated with the third-party design, purchase, delivery, installation and commissioning of equipment that saves energy and carbon and reduces costs.

Project exclusions

The following will not be eligible for support:

- Projects that solely meet compliance or other legislative energy efficiency requirements.
- Fossil fuel projects, e.g., oil to gas heating system conversions.
- Combined Heat and Power (CHP) technologies and biomass burners.
- Any technologies that are used offsite, i.e. mobile projects.
- Projects where the applicant is not the direct energy user.
- New builds - only replacement projects will be eligible. However, some projects relating to relocation of premises (other than new builds) may be permitted, these should be discussed with a Technical Advisor and will be assessed on a case-by-case basis.
- Projects that cover on-going software licencing costs.
- Subscription based equipment and projects.
- In-house personnel costs associated with the project.
- Transport related projects, for example, relating to vehicles, charging points, etc.
- Equipment leasing or hire purchase agreements. A company is permitted to use company funds, or other unsecured lending, but we do not permit other finance to be secured on the equipment.
- Second-hand equipment.
- Ancillary works or additional infrastructure works. For example, should a premises need wiring to accommodate LED lighting, the costs associated with the wiring would not be eligible under this grant scheme. For onsite generation projects, grid connection costs, etc are not eligible under this grant scheme. Eligible costs are the capital costs directly associated with the purchase, delivery, installation and commissioning of the equipment.
- Projects where indirect energy savings occur as a result of predominately material efficiency improvements. Where a project creates material savings, please contact Invest NI's Energy and Resource Efficiency Team for information on the Resource Efficiency Capital Grant: <https://www.investni.com/support-for-business/reduce-waste-and-save-energy>
- If funding from other support schemes or incentives has already been granted or is being applied for.



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- Projects that relate to business expansion will not be covered.
- Application forms will not be issued if an existing project is still active.

Please note, supplying false or misleading information may result in the rejection of your application for Invest NI assistance and we may withhold or recover assistance given.

The capital cost for equipment cannot be offset by using the part exchange or trade in value of any existing equipment as per the acceptable methods of payment outlined in the Invest NI Claims Policy: <https://www.investni.com/support-for-business/claims/eligible-costs>

Other support

Applicants can access free Technical Consultancy Support through Invest NI's Energy and Resource Efficiency team. This support can help identify suitable projects and provide the information required for the Energy Efficiency Capital Grant application.

We encourage you to speak with our Technical Advisors about completing a Technical Consultancy project before submitting an EECG application.

Details of all support available from the Energy and Resource Efficiency team can be found on our website at: <https://www.investni.com/support-for-business/save-energy-reduce-resource-consumption>

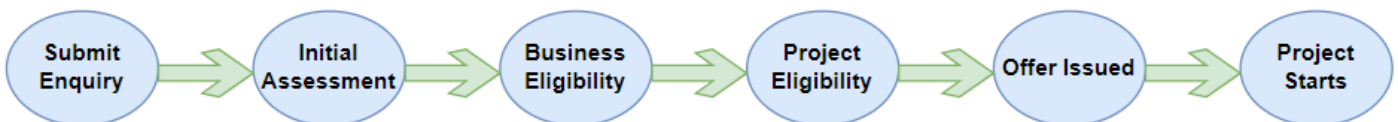
4. How to apply and timescales

The EECG will be administered to eligible businesses on a first-come first-served basis throughout the year.

The grant will operate in accordance with available annual budget.

Projects must be completed within one year from date of offer, as stated on the Letter of Offer. (If a project is not completed within the offer period, the offer may be rescinded and cancelled at Invest NI's discretion). Invest NI encourages all applicants to inform Invest NI's Energy and Resource Efficiency team at the earliest opportunity if the completion period for the project may not be met.

How to apply



- **Submit enquiry:** The first step is to complete the business and project eligibility checker.
- **Initial assessment:** Your details will be submitted to Invest NI and a Technical Advisor will contact you to discuss your business and project eligibility further.
- **Business eligibility:** If you have a potential eligible project, you may then be directed to complete a business eligibility application. At this stage you will be required to provide evidence to satisfy eligibility criteria as set out in Section 1 above.
- **Project eligibility:** Eligible businesses will have their project feasibility assessed.
- An Invest NI Technical Advisor will provide guidance at this stage.

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Grant approval is not guaranteed at this stage.

If you meet the eligibility criteria, you will need the following information to complete the project eligibility application form:

- Information on your business background.
- Proposed project description, including the purpose and benefits of your proposed project(s).
- Accurate calculations of proposed energy and carbon savings using 12 months of typical energy consumption data for your specific project and how energy consumption will reduce as a result of implementing the energy efficient equipment.
- Information on project costs, including itemised expenditure.
- Information on how you plan to fund the project.
- A completed cost and carbon saving calculator sheet must be attached with the application, ensuring the proposed energy efficiency equipment fulfils the eligibility criteria as set out above.

You must download a template of Invest NI's cost and carbon saving calculator to include as part of your application.

Quotations

All applications must include supplier quotation(s) for all the project costs included in the application form.

Quotations supplied with applications should:

- Be addressed to the company making the application. Please note that proforma invoices will not be accepted.
- Clearly identify the supplier. (Purchasing goods or services from associated companies will not be permitted).
- Be clearly related to the project costs provided in the application, as this will form the basis of any successful grant offer.
- Include sufficient detail to identify tax and VAT and itemised expenditure.
- Include sufficient detail to allow Invest NI to determine the eligibility of cost and equipment.
- Be in pounds sterling, or, if another currency, be supplemented with a screenshot of the exchange rate from XE.com showing the date of the conversion.
- Quotes must be obtained within 2 months of date the application is submitted. Please be aware, the grant amount will be based on the original price within the application, any increase in eligible costs will not be covered but note, this may have an impact on your project payback and eligibility.

Invest NI reserves the right to seek further information relating to quotations, if necessary.

Any changes to your project may invalidate your Letter of Offer and you may not receive funding. It is essential you contact Invest NI at the earliest opportunity to seek approval, before making any changes to your project.

Online application – Invest NI Customer Portal

Your EECG application must be submitted on Invest NI's Customer Portal; this is our official online application and administration system. You can save your application and return to it at any time.

An example application to the EECG is available at Annex B. This is purely an example to support applicants in the layout of their submission. Applicants are responsible for ensuring that all relevant information for their project is included in their application on the Invest NI Customer Portal. Invest NI's Energy and Resource Efficiency Team can provide guidance during the application stage.



5. Assessing Applications

Once your application form and supporting documentation have been submitted, these will then be checked to ensure your project(s) meets the eligibility criteria.

To ensure your project meets the eligibility criteria Invest NI may seek further clarification or information to help support your application, this may include:

- the level of energy use by a specific technology or system.
- the efficiency of the existing or proposed technology or equipment.
- cost of the proposed technology or equipment.

Notification of funding decision

If an application is approved, we will issue a Letter of Offer. You must not begin your project until you receive your Letter of Offer. If you incur costs because you have signed contracts, given permission to start work, raised invoices or made payments before you have received your Invest NI EECG Letter of Offer, the entire project will no longer be eligible for support.

A full outline of conditions will be provided in the Invest NI Letter of Offer and must be signed and returned by the applicant for the support to be available.

Your responsibilities

You are responsible for providing accurate and true information on your application.

Providing incorrect or misleading information is an offence and any such information may be used against you in any subsequent criminal investigation. The information provide on your EECG application form may be made available to other departments or agencies for the purposes of preventing or detecting crime.

Invest NI may release information relating to the participation of your business in this programme, in line with the [Invest NI Privacy Notice](#) and statutory obligations under [Freedom of Information](#).

You are responsible for obtaining any legal consents and complying with any legal requirements for the implementation of your project. This may include but is not limited to requirements in relation to building controls, planning permission, and landlord consents.

Invest NI will not accept responsibility for your failure to comply with any legal requirements relating to your project.

For successful projects, Invest NI will conduct a Post Project Evaluation (PPE) 18 months after project completion. This may include additional site visits to your premises, and you will be required, where applicable to provide information on equipment performance.

6. Submitting a claim

Once the equipment for your project has been purchased and fully installed, you must submit your grant claim to Invest NI via the [Invest NI Claim Pack](#) by the date detailed within your Letter of Offer. Proof of Invest NI receiving this claim must be retained by the applicant.

Please note that all costs must be incurred and paid for by the business that is named on the Letter of Offer.

If an application contains multiple separate projects these projects can be claimed independently of others.

For individual projects, part claims will not be accepted, and projects will only be considered complete once all relevant project equipment is paid for, installed, commissioned and equipment is operational.

If the grant claim is for more than £25,000, it must be accompanied by an Auditor's certificate in the form provided by Invest NI.

Project technical vouch

Before any claim is paid, the newly installed equipment will be vouched by an Invest NI Technical Advisor, this will involve:

- A site visit to the location of the equipment to witness the equipment generating the efficiencies detailed within the application form.
- Photographing the equipment including serial numbers and equipment details will be taken.

Data protection and handling

The EECG is managed and administered by Invest NI. We will access to the information you provide as part of your application to assess your eligibility and to conduct post scheme governance assessments.

As this financial support is sourced from public funds Invest NI will, in the interest of openness and transparency, proactively publish limited information on the fund including:

- name of applicant
- application title
- amount of assistance.

Invest NI will handle your data in compliance with applicable laws including the General Data Protection Regulation (GDPR) and the Data Protection Act 2018 (DPA).

For further details on the data handling practices please see the [Invest NI Privacy Notice](#).

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Other

Right to amend

Dependant on future funding availability and uptake, Invest NI reserves the right to amend the scheme eligibility criteria, which may include grant rates, eligible technologies and funding priorities.

General enquiries

If you have any enquiries about the EECG [Contact Us](#)

You can also call Invest NI's Business Support Team on 0800181 4422. Lines are open Monday to Friday 09.30 to 16:30.



Appendix A

European Union Notification and Business Size Definitions

State Aid Notification:

For all businesses the scheme will be delivered under De Minimis aid, Commission Regulation (EU) No.1407/2013 of 18 December 2013.

Business size definitions:

A small enterprise is defined as:

- An enterprise that has fewer than 50 employees, and
- Has either an annual turnover and/or an annual balance sheet total not exceeding €10m.

A medium sized enterprise is defined as:

- An enterprise that has between 50 employees and 249 employees, and
- Has either an annual turnover not exceeding €50m or an annual balance sheet total not exceeding €43m.

A Large Enterprise will be anything else that does not fall into either the smaller or medium-sized categories.

If a company is part of a group, then the employee, turnover, annual balance sheet and ownership limits apply to the group.

In all cases, if the enterprise is more than 25% owned by one or more enterprises or itself has a holding of more than 25% in any other enterprise, it will be necessary to consult the full definition in the Official Journal (see *below).

Excluded from the holding company threshold in the above definition are public investment corporations, venture capital companies and institutional investors provided that they do not exercise control. However, an enterprise cannot be considered as meeting either definition if 25% or more of the capital or voting rights are directly or indirectly controlled, jointly or individually, by one or more public bodies.

*For the full definition, see the “Official Journal of the European Commission (L 124/36) 20th May 2003 – Commission Recommendation of 6th May 2003 concerning the definition of micro, small and medium-sized enterprises.” <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ%3AL%3A2003%3A124%3ATOC>

Appendix B – Example of a completed project feasibility application

The following pages detail an example application to support applicants in submitting their application. This is included to help applicants layout of their submission correctly. Applicants are solely responsible for ensuring that all relevant information for their project is included within their application on the Invest NI Customer portal.

1 - Guidance	2 - Your Details	3 - Project Details	4 - Purpose & Benefits	5 - Project Risks	6 - Project Costs	7 - Viability	8 - Why Invest NI Funding	9 - De Minimis	10 - Declaration
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Application Information

Energy Efficiency Capital Grant (EECG) - Project Eligibility

The **Energy Efficiency Capital Grant (EECG)** provides financial support for the installation of equipment that offers greater efficiency in the use of energy, providing cost savings and carbon savings, for project costs from £4,000 upwards. The maximum grant is set at 50% of eligible project costs and capped at £150,000 of capital grant.

The level of grant support will depend on company size. Support for all businesses is set in line with De-Minimis Aid rules. (See Guidance Notes for a full definition of Small, Medium and Large company categories)

You will need the following information to complete this application.

- Information about your business (such as company background information, details of the Project Manager and current costings of your energy use).
- Information about the project you will undertake (such as current energy usage and the energy, cost and carbon savings you hope to achieve and any operational risks).
- Quotations from any suppliers about the equipment you propose to purchase, along with exchange rate information if the quote is not in GBP.
- Details of any other publicly funded support your business may have received over the last three years.
- Data from your completed Cost and Carbon Calculator. **(We would strongly advise you download and calculate this before completing the application to ensure any project is eligible.)**

Download Cost and Carbon Calculator

Once you have your project information and evidence collated, the online application process takes approximately 1 to 1.5 hours to complete.

Who is eligible to apply?

Support will be available to current Invest NI clients and non clients who are deemed as 'eligible businesses' who meet the programme criteria. Non Invest NI clients will be required to complete a business eligibility check as detailed in the grant Guidance Notes. Please note that businesses considering an application will be required to have discussed potential projects with an Invest NI Technical Advisor before an application is submitted.

Important Information

- The submission of an application does not guarantee project funding.
- Any expenditure incurred prior to receiving a letter of offer from Invest NI will not be eligible for support.
- Support is paid net of VAT.
- Support paid is subject to [Invest NI Eligible Costs policies](#) (eligible costs and payment methods).
- Please note, technical support for your application is available from the Invest NI Energy and Resource Efficiency Team.
- To allow other people to access the application, please click the 'Add Contributors' button to the right and add them to the list of authorised contacts.
- For further details on costs which are eligible to be claimed back, please see the programme [Guidance Notes](#)
- You should have read and understood the guidance notes:

Download Guidance Notes

Privacy

For details on how we use your personal data, including your rights, please see Invest NI's [privacy notice](#).

As this financial support is sourced from public funds Invest NI will, in the interest of openness and transparency, proactively [publish limited information](#) on the scheme including:

- Name of applicant
- Application title
- Amount of assistance

Accessibility

If you require an application form in an alternative format, please contact equality@investni.com or see our [Equality Statement](#) for further details.

A response is required for all questions marked with *

* I have read the guidance notes

Next

Please remember to save your work using the buttons on the top right hand side.

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Energy Efficiency Capital Grant (EECG) - Project Eligibility

Closing Date: N/A Project Owner: N/A Status: Draft

Application Details Related Documents

- 1 - Guidance
- 2 - Your Details
- 3 - Project Details
- 4 - Purpose & Benefits
- 5 - Project Risks
- 6 - Project Costs
- 7 - Viability
- 8 - Why Invest NI Funding
- 9 - De Minimis
- 10 - Declaration

General Company Information

* Company Name
invest Northern Ireland

Trading Name
Company A

* Product Service Description
Food Production

* Type of Business
Sole Trader

* Trading Status
Trading

* Date Established in NI
01/12/2011

* Financial Year End Date
31/03/2024

* Country of Ownership
Northern Ireland

* Industry Sector
Agri-Food Services

* Is the Organisation a Social Enterprise?
 No Yes

* Company Background
Company A is a food production business based in NI. Over the past number of years the business has grown significantly and now provides food products to large supermarkets across UK and ROI and throughout Europe.

- Save draft
- Download
- Submit application
- Add Contributors
- Withdraw application

SME Status

When making the calculations, you should use the data contained in the last approved annual accounts. Newly established enterprises that do not yet have approved annual accounts should make a declaration that includes a bona fide estimate (in the form of a business plan) made over the course of the financial year. This business plan should cover the entire period (financial years) until the entity will generate turnover.

- [EU SME Definitions](#)
- [EU SME Calculator](#)

* Annual turnover
All income generating from the sales of products and/or supply of services. If pre-trading this may be 0.
£ 5,000,000.00

* Staff headcount
15

* Current Employment in NI (FTE)
15.00

* Annual balance sheet total
The annual balance sheet summarises an organisation's assets, liabilities and equity at the end of its financial year. Your answer should consist of the value of the total assets or, the value of the total liabilities and total equity. i.e. the balance sheet total is the sum of the fixed and current assets before deduction of current and long-term liabilities. (It is NOT the "net asset" value).
If your business is pre-trading, this figure may be 0.
£ 1,000,000.00

Group Structure

* Does the company, its owners or a major shareholder own 25% or more of any other business? (This includes any business interests in the name that you have submitted on this form or under any other name)

Yes No

Business Locations

You can add a new location using the 'Add Location' button below.

Please note: For data security reasons, you cannot change existing locations. Should you wish to do this, you will need to contact your Invest NI Contact/Client Executive. Their details can be found on your [Dashboard](#).

Click to Add a Location

Location Name ↑	Address Line 1	County	Post Code
Bedford Street	1 Bedford Square		BT2 7ES

* Headquarters
After adding a location, or multiple locations, in the table above; please select the location where your business is headquartered.
Bedford Street

Business Contacts

You can add a new contact using the 'Add Contact' button below. You should ensure that Partners and/or Directors and the Company Secretary (where appropriate) are included in this list. Key staff contacts can also be listed here.

Please note: For data security reasons, you cannot change existing contacts. Should you wish to do this, you will need to contact your Invest NI Contact/Client Executive. Their details can be found on your [Dashboard](#). Not all contacts listed here may have access to the MyINI portal.

Click to Add a Contact

First Name ↑	Last Name	Job Title	Login Enabled
Smith	John		Yes

* Main Contact
Mr John Smith

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Energy Efficiency Capital Grant (EECG) - Project Eligibility

Closing Date: N/A Project Owner: N/A Status: Draft

Application Details Related Documents

- 1 - Guidance
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Project Details

*** Main Project Contact**
Select the Main Project Contact. If the Contact does not exist please [click here](#) to add.

*** Project Title**
Please enter a descriptive name for your application title (between 3-20 words). This application title, alongside limited details of your participation, may be [published](#) or [discoverable](#). Therefore we recommend you choose a title that will not disclose commercially sensitive information about your project.

Word Count: 5 of 20

*** Please confirm the mix of goods/services that your business sells.**

- Goods only
- A mix of goods and services
- Services only

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Current Costs

* How much does the business spend annually on electricity? (£)

£ 75,000.00

* How much does the business spend annually on gas? (£)

If this is not applicable, please enter 0.

£ 40,000.00

* How much does the business spend annually on oil? (£)

If this is not applicable, please enter 0.

£ 0.00

* How much does the business spend annually on energy, as a whole? (£)

You should include the figures above in your total calculation and any other energy costs.

£ 150,000.00

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Proposed projects

Please give details on your project(s) including your existing technology, the new technology to be implemented and an explanation of why this is beneficial to your business.

Details of these figures must be included in the [Cost and Carbon Calculator](#).

You can apply for up to 3 energy efficiency projects in the application and you should list each individual project in the table below.

To add a new project, please click on the "Add Project" button at the top right of the Project table. Once you have added a project, you can edit or delete this by clicking the drop down arrow to the right of each row.

Projects Add Project

Project Number	Project Title	Description	Project Cost (£)	Project Location
1	EECG Solar PV Project	We are a food company who would like to install a 50kW Solar PV system to reduce our energy costs and carbon emissions. The 50kW Solar PV system will be installed on our factory roof (126 PV modules covering 242.2m2 and 1 inverter). At present, all our electricity is supplied via the mains electricity grid. Our weekly production hours are Monday 8am – 8pm, Saturday and Sunday 9pm – 4pm. It is expected that all electricity generation from the Solar PV system will be utilised onsite during the operational hours of the factory. By implementing this project, we will be displacing/replacing a portion of our current grid electricity consumption (approximately 16.93%) with a renewable fuel source and will therefore be reducing their carbon footprint and environmental impact. Baseline energy consumption and carbon emissions These figures have been taken from our electricity bills for January – December 2023 and are representative of our electricity consumption, costs and carbon emissions within the factory. Baseline annual electricity consumption: 250,000kWh Baseline annual energy cost: kWh x £0.30/ kWh = £75,000 Carbon emissions: 80.75 tonnes CO2/yr Future energy consumption and carbon emissions Once the 50kW Solar PV system has been installed at our factory, solar production, annual energy consumption, costs and carbon emissions are estimated as the below: Estimated annual solar production for the 50kW solar PV system = 42,313kWh (This figure was estimated using the online tool PV GIS). Future annual energy consumption: 42,313kWh (solar electricity) + 207,687kWh (grid electricity) = 250,000kWh Future annual energy cost: = 42,313kWh (solar electricity) @ £0.00/ kWh + 207,687kWh (grid electricity) @ £0.30/ kWh = £62,306.10. Carbon emissions: 67.08 tonnes CO2/yr Future savings from project implementation By installing the 50kW Solar PV system at the factory, the below estimated annual savings have been projected: There is no energy reduction, but 42,313kWh will come from a renewable source now. Total annual cost savings: £75,000 - £62,306.10 = £12,693.90 Total annual carbon emissions savings: 13.67 tonnes CO2/yr (16.93%) (80.75 tonnes CO2/yr – 67.08 tonnes CO2/yr) Payback Period: The total project cost is £35,888.00. Based on an annual energy cost savings of £12,693.90 the payback period will be 2.83 years.	£35,888.00	Bedford Street

Total costs of all projects (£)

35,888.00

Project(s) Item Costs

Please list any costs associated with the project(s) for which you are seeking support, including those that you believe will be ineligible.

As part of this application you will need to provide information on the proposed costs for the overall, and even multiple projects for which you are seeking support.

Please use this table to separately itemise each cost associated with your project(s). These costs should directly match your quotation e.g. Item 1 - Technology, Item 2 - Delivery, Item 3 - Installation.

Items Add Item Cost

Project Number	Item	Cost	Currency	Exchange Rate	Item total cost	Project Location
1	50kW Solar PV System	35,888.00	£	1.00	35,888.00	Bedford Street

Total costs of items (£)

35,888.00

Project Impacts

* Has the business had discussions with, made applications to, or received offers from Invest NI staff about any other projects related to the one that you have detailed in this application?

Yes No

* Do you understand the requirements at claims stage and can you provide all the requested information?

For more information on the Claims process and the requirements, please see the Guidance Notes or, if applicable, contact your Client Executive.

Yes No

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Proposed Project

*** Project Number**

Please add a number to each project you are submitting.

*** Project Title**

Please add a Project Title for each project you are submitting.

*** Project Description**

Please provide detailed information on your existing technology and associated energy use and spend. Please also provide detailed information on the proposed project including the benefits from estimated energy reduction, cost and carbon savings.

This information should explain how you derived the figures in your cost and carbon calculator.

We are a food company who would like to install a 50kW Solar PV system to reduce our energy costs and carbon emissions. The 50kW Solar PV system will be installed on our factory roof (126 PV modules covering 242.2m² and 1 inverter). At present, all our electricity is supplied via the mains electricity grid.

Our weekly production hours are Monday 8am – 8pm, Saturday and Sunday 9pm – 4pm.

It is expected that all electricity generation from the Solar PV system will be utilised onsite during the operational hours of the factory. By implementing this project, we will be displacing/replacing a portion of our current grid electricity consumption (approximately 16.93%) with a renewable fuel source and will therefore be reducing their carbon footprint and environmental impact.

Baseline energy consumption and carbon emissions

These figures have been taken from our electricity bills for January – December 2023 and are representative of our electricity consumption, costs and carbon emissions within the factory.

Baseline annual electricity consumption: 250,000kWh

Baseline annual energy cost: kWh x £0.30/kWh = £75,000

Carbon emissions: 80.75 tonnes CO₂/yr

Future energy consumption and carbon emissions

Once the 50kW Solar PV system has been installed at our factory, solar production, annual energy consumption, costs and carbon emissions are estimated as the below:

Estimated annual solar production for the 50kW solar PV system = 42,313kWh (This figure was estimated using the online tool PV GIS).

Future annual energy consumption: 42,313kWh (solar electricity) + 207,687kWh (grid electricity) = 250,000kWh

Future annual energy cost: = 42,313kWh (solar electricity) @ £0.00/kWh + 207,687kWh (grid electricity) @ £0.30/kWh = £62,306.10.

Carbon emissions: 67.08 tonnes CO₂/yr

Future savings from project implementation

By installing the 50kW Solar PV system at the factory, the below estimated annual savings have been projected:

There is no energy reduction, but 42,313kWh will come from a renewable source now.

Total annual cost savings: £75,000 - £62,306.10 = £12,693.90

Total annual carbon emissions savings: 13.67 tonnes CO₂/yr (16.93%) (80.75 tonnes CO₂/yr – 67.08 tonnes CO₂/yr)

Payback Period:

The total project cost is £35,888.00. Based on an annual energy cost savings of £12,693.90 the payback period will be 2.83 years.

*** Project Cost (£)**

Please add the capital costs for your project.

*** Project Location**

Please add the Location of the Project.

Submit

Item Cost

*** Project Number**

Please select the project number, as outlined in the Project table above.

*** Item Description**

This item description should match directly with your valid quotation.

*** What is the cost of the item?**

Please note:

- You do not need to include a currency symbol.
- You can provide the cost in a foreign currency value.

*** What is the currency of the item cost above?**

*** What is the exchange rate of the currency listed above compared to British Pounds (GBP)?**

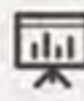
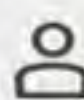


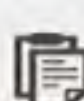

Please note:

- If the cost is already in British Pounds (GBP), please input 1.
- You should provide the exchange rate for the currency value compared to 1 British Pound (GBP), as this rate will be used to calculate the item's equivalent cost in British Pounds (GBP).

*** Project Location**

Please add the Location of the Project.

Submit

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Energy Efficiency Capital Grant (EECG) - Project Eligibility

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Project Risks

List the key project risks which you believe have a medium to high impact and medium to high probability of happening. You do not need to include information on risks which have a low probability of happening or that would have a low impact on the project. You should consider:

- **Technical risks** (e.g. Knowledge gaps, new/untested technology, skills availability)
- **Business risks** (e.g. Strategic, compliance, financial, staffing) and;
- **Operational risks** (e.g. legislation, funding, cost control)
- **Project risks** (e.g. lack of supplier expertise)

For more information on understanding different types of risk that your business faces, click [here](#).

Are there any medium to high impact and medium to high probability risks to your project?



Yes No

Add Risk

Description ↑	Impact	Probability	Mitigation
Financial Risk associated with delays in installation of equipment that could result in missing the deadline for claiming grant funding.	Medium	Medium	We have identified a reputable solar PV supplier/installer and have agreed project milestones with them to mitigate against this
Risk associated with not being able to obtain export grid connection for the solar PV system.	Medium	Medium	We have engaged with the DNO to explore our options, if there is no option to connect to the grid we have been advised that we could explore a zero export connection.. We have started enquiring on this process to ensure enough time is available to sort this.
Supply Chain delays associated with the increased demand in the product due to the drive towards decarbonisation in industry.	Medium	Medium	We have engaged with a reputable supplier who has produced project milestones for project implementation, we have allocated extra time to the project completion date to mitigate against any minor delays.

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Attachments and supplementary information

To help support your application, you will also need to attach supporting documentation such as quotations, or exchange rate evidence. You can upload these documents along with the Cost and Carbon Calculator for your project as outlined in the introduction of this application. If you have not already downloaded the template, you can download it below. Your Technical Advisor may require you to provide further supporting documentation in order to verify project eligibility.

Download Cost and Carbon Calculator

- * Have you attached your Cost and Carbon Calculator?
 Yes No
- * Have you attached quotations that are valid, as per the guidance notes?
 Yes No
- * If applicable, have you included a screenshot of the Xe.com exchange rate for costs incurred that are not in Pounds Sterling?
Please note, if including exchange rate information, it is important that both the amount and date are visible in the same screenshot.
 Yes No Not Applicable

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Invest NI Cost and Carbon Savings Calculator (2024-2025) Please use 2023 energy data for your baseline



1. Baseline Scenario Information

Energy Source	Energy Source	Unit of Measurement	Units Consumed (units/yr)	Energy Cost		Energy Content (kWh/unit)	Energy Usage (kWh/yr)	Carbon Emission Factor (kg CO ₂ /kWh)	Carbon Emissions (tonnes CO ₂ /yr)
				(£/unit)	(£/yr)				
1	Electricity - Mains	kWh	250,000	£0.30	£75,000.00	1.00	250,000	0.32	80.75
2					£0.00	0.00	0	0.00	0.00
3					£0.00	0.00	0	0.00	0.00
4					£0.00	0.00	0	0.00	0.00
5					£0.00	0.00	0	0.00	0.00
6					£0.00	0.00	0	0.00	0.00
7					£0.00	0.00	0	0.00	0.00
8					£0.00	0.00	0	0.00	0.00
9					£0.00	0.00	0	0.00	0.00
10					£0.00	0.00	0	0.00	0.00
11					£0.00	0.00	0	0.00	0.00
12					£0.00	0.00	0	0.00	0.00
Sub Total			250,000		£75,000.00		250,000		80.75

Other Category - This section is for manual entry of project information

Project	Energy Source	Unit of Measurement	Units Consumed (units/yr)	Energy Cost		Energy Content (kWh/unit)	Energy Usage (kWh/yr)	Carbon Emission Factor (kg CO ₂ /kWh)	Carbon Emissions (tonnes CO ₂ /yr)
				(£/unit)	(£/yr)				
1					£0.00		0		0.00
2					£0.00		0		0.00
3					£0.00		0		0.00
4					£0.00		0		0.00
5					£0.00		0		0.00
Sub Total			0		£0.00		0		0.00

2. Future Scenario Information

Project Type	Renewable Energy	<small>Please select from the drop down list</small>
Project Description	Solar PV	<small>Please enter a description</small>
Project Capital Cost (£)	£35,888.00	<small>Please enter the project capital cost</small>

Energy Source	Energy Source	Unit of Measurement	Units Consumed (units/yr)	Energy Cost		Energy Content (kWh/unit)	Energy Usage (kWh/yr)	Carbon Emission Factor (kg CO ₂ /kWh)	Carbon Emissions (tonnes CO ₂ /yr)
				(£/unit)	(£/yr)				
1	Electricity - Mains	kWh	207,687	£0.30	£62,306.10	1.00	207,687	0.32	67.08
2	Electricity - Solar PV	kWh	42,313	£0.00	£0.00	1.00	42,313	0.00	0.00
3					£0.00	0.00	0	0.00	0.00
4					£0.00	0.00	0	0.00	0.00
5					£0.00	0.00	0	0.00	0.00
6					£0.00	0.00	0	0.00	0.00
7					£0.00	0.00	0	0.00	0.00
8					£0.00	0.00	0	0.00	0.00
9					£0.00	0.00	0	0.00	0.00
10					£0.00	0.00	0	0.00	0.00
11					£0.00	0.00	0	0.00	0.00
12					£0.00	0.00	0	0.00	0.00
Sub Total			250,000		£62,306.10		250,000		67.08

Other Category - This section is for manual entry of project information

Project	Energy Source	Unit of Measurement	Units Consumed (units/yr)	Energy Cost		Energy Content (kWh/unit)	Energy Usage (kWh/yr)	Carbon Emission Factor (kg CO ₂ /kWh)	Carbon Emissions (tonnes CO ₂ /yr)
				(£/unit)	(£/yr)				
1					£0.00		0		0.00
2					£0.00		0		0.00
3					£0.00		0		0.00
4					£0.00		0		0.00
5					£0.00		0		0.00
Sub Total			0		£0.00		0		0.00

3. Summary Information

	Baseline Scenario <small>This is your current total energy usage</small>	Future Scenario <small>Forecast energy usage after project installation</small>	Project Savings <small>Baseline Scenario - Future Scenario</small>
Energy Cost (£/yr)	£75,000.00	£62,306.10	£12,693.90
Energy Usage (kWh/yr)	250,000	250,000	0
Carbon Emissions (tonnes CO ₂ /yr)	80.75	67.08	13.67

	Criteria	Your Project
Project Capital Cost	£4,000.00	£35,888.00
Carbon Emissions (%)	10.00%	16.93%
Energy Savings (%)	-	-
Payback (years)	Between 1 - 8 years	2.83
Eligible for Funding?	Yes / No	Yes

QUOTATION

**Buyer Company Name
and full address**

**Seller Company Name
and full address**

**Dated – Quotes older than 2 months
from application submission date
will not be accepted**

- **Be addressed to the company making the application.**
- **Clearly identify the supplier. (Purchasing goods or services from associated companies will not be permitted).**
- **Proforma invoices will not be accepted.**
- **Be clearly related to the project costs provided in the application, as this will form the basis of any successful grant offer.**
- **Include sufficient detail to identify any tax/VAT and itemised expenditure.**
- **Include sufficient detail to allow Invest NI to determine the eligibility of cost and equipment.**
- **Be in pounds sterling, or, if another currency, be supplemented with a screenshot of the exchange rate from XE.com showing the date of the conversion.**
- **Quotes must be obtained within 2 months prior to the date the application is submitted.**
- **The grant amount will be based on the original price within the application, any increase in eligible costs will not be covered but note, this may have an impact on your project payback and eligibility.**

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Energy Efficiency Capital Grant (EECG) - Project Eligibility

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Viability

*** Is there a project plan in place with milestones and timeframes?**
 Yes No

*** Is there sufficient finance available to the business to complete the project, prior to claiming back the funding?**
As outlined in the Claims guidance information, funding for projects can only be claimed back after completion of the project. Businesses must initially provide the outlay for the project costs and then claim these back in arrears.
 Yes No

*** What is the source of the finance that will be used to complete the project, prior to claiming back the funding?**
Please note: Project expenditure obtained via hire purchase or trade-in is not eligible for financial support.
 Own funds Loan

*** Do you accept that only fully installed, commissioned and paid projects are able to be claimed for?**
 Yes No

*** Are you able to claim all expenditure by the end of the claim period?**
The claim period for this scheme is detailed in the [Guidance Notes](#).
 Yes No

*** Estimated date for ordering equipment**
12/06/2024

*** Estimated date for delivery and installation**
12/08/2024

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Why is Invest NI funding required?

* Without Invest NI funding:

Please select most relevant option.

- The project will go ahead regardless
- The project will go ahead, at a later date, at a similar scale
- The project will go ahead, but will take longer to complete
- The project will go ahead, but at a reduced scale
- The project will go ahead, but at a lower quality
- The project will be abandoned

* Without Invest NI funding:

Please select the relevant option.

- Without the project we probably won't continue trading
- If successful, the project will account for a significant cost saving
- The project outcome is important to the business, but we have a number of other products or services in the pipeline
- The project outcome is of modest importance to the business
- The project outcome is of minor importance to the business







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De Minimis Aid Declaration

Has the company or any company within the Group (if applicable) received any form of public support or grant that was classed as De Minimis in the current and previous 2 fiscal (accounting) years? If 'Yes', please provide detail in the table below.

Please note that it is your responsibility to check whether the support you have received was classed as 'De Minimis' aid. If in doubt, please check with whoever provided you with the support.

Why do I need to declare De Minimis Aid? [?](#)

You have received £0.00 (€0.00) of De Minimis support from Invest NI over the last 3 years.

• Is the company active in any of the following industry sectors?

Fishery and Aquaculture; Primary Production of Agricultural Products; or Road Freight transport? These sectors have specific lower ceilings of de minimis aid.

Yes No

Assistance Not Provided by Invest NI Within the Past 3 Years (e.g. Local Council, DAERA, etc.):

[+ Create](#)

Date Support Offered ↑	Purpose Scheme	Funding Body	Amount (£)	Historical Rate	Euro Equivalent (€)
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There are no records to display.

De Minimis Assistance Provided by Invest NI Within the Past 3 Years:

Date Support Offered ↑	Purpose Scheme	Funding Body	Amount (£)	Historical Rate	Euro Equivalent (€)
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Energy Efficiency Capital Grant (EECG) - Project Eligibility

Closing Date: N/A Project Owner: N/A Status: Draft

Application Details

Related Documents

- 1 - Guidance
- 2 - Your Details
- 3 - Project Details
- 4 - Purpose & Benefits
- 5 - Project Risks
- 6 - Project Costs
- 7 - Viability
- 8 - Why Invest NI Funding
- 9 - De Minimis
- 10 - Declaration**

Declaration

By signing and electronically submitting this application, you confirm the following:

- I have not applied, and will not apply, to any other government department / local authority / research council / public body in respect of the costs of undertaking this project outlined in this application, unless otherwise detailed in this application.
- I will allow access to the business, to any authorised person, for the purpose of carrying out an inspection, in order to verify the accuracy of the information in this application.
- I will notify Invest NI in advance of carrying out any changes to the nature of this project.
- I understand that any expenditure incurred on this project outside of written approvals from Invest NI will not be eligible for financial assistance.
- I understand that Invest NI may release select information, relating to the participation of my business in this programme, in line with their [Privacy Notice](#) and their statutory obligations under [Freedom of Information](#).
- I understand that copies of all or some of the information provided in this application form may be provided to accountants, individuals and organisations, including governmental bodies, who Invest NI may consult with when assessing applications, administering a programme and evaluating the award of a grant or for research purposes. I authorise any enquiries necessary to be made (including using personal information to conduct appropriate checks with credit reference agencies) to confirm the information contained in this form and assess the proposal.
- I will provide any further information as may be required by Invest NI.

Authorisation

All applications must be authorised in the case of a Limited company, by a Director or the Secretary. In the case of a Sole Trader or Partnership, by a Proprietor or Partner. This cannot be signed by a consultant working on behalf of the company.

By electronically signing and submitting this application you declare the following: **"I confirm that the information contained in this form is true, accurate and not misleading as at the date of this form, and that Invest NI is entitled to rely on that information. I am authorised to apply for this scheme."**

* Authorised Signatory Name

Mr John Smith

* Position in Organisation

Director

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