

InvestEU Advisory Hub Operational Reporting (KPI&KMI) Methodology for Advisory Partners

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1. Legal provisions

The purpose of the indicators developed in relation to the operational reporting under the InvestEU Advisory Hub is to provide a basis for the monitoring of performance of the programme (operational reporting) and its evaluation. They feed into the annual report by the Commission (COM) to the European Parliament and Council on the progress of the InvestEU Programme (Article 28.3), and the bi-annual reports of all Advisory Partners (APs) to the Commission (Article 28.5).

The Commission may establish additional and/or revised indicators through delegated acts, including for the purpose of the evaluations referred to in Article 29 (Article 28.5).

In addition, more detailed indicators may be included in the advisory agreements signed by the APs on the basis of the specific Advisory Initiatives to be deployed and to satisfy further data requirements of the Commission.

Additional specific indicators may be still developed with respect to any Advisory Initiatives that might be implemented with a contribution under the Member State (MS) compartment. The respective contribution agreement will specify any additional annual reporting obligations towards the contributing Member State, subject to the agreement of the parties.

Based on the policy steer and/or a periodic review of the pipeline foreseen under the InvestEU Advisory Hub, reporting of the more detailed indicators referred to above could be elaborated and included in the Advisory agreement with each AP, where justified.

2. Basic elements of reporting under the InvestEU Advisory Hub

The operational reporting data provided by each AP feeds into the reporting of the progress of the InvestEU Programme. The APs are required to report on the basis of a common set of indicators for all Advisory Initiatives they are implementing under the InvestEU Advisory Hub. Specific reporting requirements may be established for better monitoring the processes, outputs and outcomes under the different Advisory Initiatives offered under the InvestEU Advisory Hub, which will be subject to agreement with the AP.

In case of implementing Advisory Initiatives supported by EU MS under the MS compartment, the AP and the Commission shall submit to the contributing Member State the monitoring information agreed in the contribution agreement in time, so that the Member State can integrate the respective information in its monitoring exercise as required by the regulatory framework of the contributing EU fund.

Reports from all APs are collected on the basis of standardised templates as part of a comprehensive InvestEU Management Information System (InvestEU MIS). The Commission uses the information stored and regularly reported in the InvestEU MIS to aggregate and analyse the data on the statistics and performance of the InvestEU Advisory Hub initiatives. This ensures that reporting is to the maximum extent based on automated processes and that the information/data submitted as part of these different processes is coherent. Such an IT solution also provides for an automated pre-verification of that data

submitted by APs, in order to reduce the risk of error and administrative burden for the Commission services (InvestEU Secretariat)¹.

The APs report aggregated figures on the basis of the InvestEU Advisory Hub KPI&KMI Methodology. On request of the Commission and in agreement with the APs, they may need to specify the assumptions, calculations and data underlying the aggregate figures².

The APs report on the indicators based on information provided by its counterparts or produced by its experts, which in turn is received from the project promoters, final beneficiaries or service providers in the case of sub-contracted activities.

3. Recording of advisory requests

An advisory request is the initial input coming from an external potential project promoter or other relevant potential beneficiary/promoter seeking advisory support. It consists of certain initial information to help the InvestEU Advisory Hub central entry point to pre-select the most suitable Advisory Initiative and/or AP. The InvestEU MIS aggregates the data received through the central entry point that is available within the InvestEU Advisory Hub and that manages the advisory requests.

Requests can be provided through the central entry point via a Q&A Wizard or relevant counterparty can directly contact an AP of their choice. In the latter case, the AP registers all received advisory requests into the front office of the InvestEU Advisory Hub in order to provide for monitoring on the type of advisory requests received and to allow for further allocation by the Commission, if necessary. These can be submitted via Front Desk or once available, via a structured file.

Such requests should contain the following information:

- Type of request: Project or non-project specific request.
- Assigned Advisory Initiative, if relevant.
- Reference ID.
- Sector of the advisory request (NACE 2 code).
- Type of support needed (e.g. project advisory, capacity building, market development) as outlined in Annex I.
- Description of the advisory need.
- The type of requestor (Private company; Public Entity; Public-Private Partnership; NPBI, IFI; EC Service).
- Actions or steps taken (in case of project advisory related request), where applicable.
- Project readiness (in case of project advisory related request).
- Estimated investment project cost (in case of project advisory related request).

¹ For the predecessor programmes, the Commission received data typically in the form of PDF and Excel files. These files were then recorded by the various Commission recipients in different locations. Extraction and consolidation of data were normally carried out manually by the various Commission services.

² It should be noted that the protection of submitted information, and personal data is governed by the respective section of the terms and conditions of MIS and the MIS privacy statement, the principles of which similarly apply in the exceptional circumstance of MIS unavailability. The Commission keeps information submitted on a confidential basis and securely stored on its own servers and does not disclose any such information for commercial or any other purposes unless prescribed by court or law.

- InvestEU eligible area of the advisory request, if available.
- Possible consideration of other funding schemes, if available.
- Financial support details, if available.
- Country of location of the potential advisory support.
- Region of location of the potential advisory support, when available.
- Date of submission of the request.
- Requester contact information (last name; first name; email; organisation name; address; country; and if available phone number; business partner; position in the organisation; National ID Number; VAT Number; website).

To proceed from the request stage of an advisory support the following information need to be submitted:

- Short description of the assignment and the deliverables.
- Additional description of the underlying project (in case of project advisory).
- Expected allocated budget of the potential advisory assignment related to the request.

For assignments, where no validation is required, an automatic process shall be established. This will skip the previous step but will require the completion of the following information to be filled in the registration process:

- i. Advisory Initiative as per Annex III.
- ii. InvestEU eligible area Level 1 as per Annex II.
- iii. Expected allocated budget of the potential advisory assignment related to the request.

The expected allocated budget of the potential advisory assignment should provide an estimate of the InvestEU Advisory Hub's required budget, in order to implement the possible validation rules agreed in the advisory agreement with the AP. The actions and deliverables listed in the assignment should identify the underlying costs which could be identified by a number of full-time experts (FTEs) multiplied by a unit cost, mission and consultancy costs.

Once the Advisory Partner decides to proceed with an advisory request, the assignment will be fully developed and pass necessary approvals and where applicable EC validation. From this stage on, the assignment is included in the regular reporting cycle with the applicable key performance and monitoring indicators. In MIS, the assignment will change its status to "Support in Progress" indicating the final approval date as a start date and an estimated duration. An assignment is typically completed once the advisory service with the Beneficiary has been concluded. This should be recorded in the MIS by the Advisory Partner, who must request the completion of the relevant assignment and specify its end date.

4. InvestEU Advisory Hub key performance and monitoring indicators

4.1. Operational reporting for all advisory assignments under the InvestEU Advisory Hub

The following indicators are required to be reported by the APs for all advisory assignments implemented under all Advisory Initiatives of the InvestEU Advisory Hub.

4.1.1. Number, size, type and distribution of advisory assignments (Indicator 1.1)

Methodology: This indicator measures the number and type of advisory assignments under the InvestEU Advisory Hub. The following information is reported as part of the Assignment update reporting:

- 1) Name of advisory assignment and assigned Advisory Initiative.
- 2) Short description of the assignment including objectives and expected output.
- 3) Type of assignment final beneficiary (public authorities/ SMEs/ corporates/COM services/financial intermediaries).
- 4) Type of advisory support (e.g. project advisory, capacity building, market development) as outlined in Annex I in the most granular level of detail available.
- 5) Estimated allocated budget of the advisory assignment taking into account the actions and deliverables listed in the assignment, identifying the number of FTEs multiplied by a unit cost, incl. mission and consultancy costs and beneficiary contribution, where applicable.
- 6) Country and region /EU-wide [(NUTS 2/3)].
- 7) Sectors (NACE 2).
- 8) InvestEU eligible area as per Annex II provided in the most granular level of detail available.
- 9) Expected link to the InvestEU Programme, where applicable, i.e. potential of the assignment to generate projects that are eligible to receive financing supported by the InvestEU Fund and/or AP's own resources but aligned with InvestEU priorities.
- 10) Expected link/potential to be supported from other EU programmes incl. co-financing from ERDF, CF, JTF, PSLE, ReactEU, CEF, Horizon Europe, RRF, Programme for Environment and Climate Action (LIFE), Digital Europe Programme, European Space Programme; EU4Health; European Social Fund+; European agricultural guarantee fund (EAGF); European agricultural fund for rural development (EAFRD); European Maritime, Fisheries and Aquaculture Fund; European Defence Fund; Overseas Countries and Territories; where applicable.

Unit of measurement: Number

4.1.2. Number of advisory assignments contributing per specific EU objectives (Indicator 1.2)

Methodology: This indicator is reported in the technical report and measures the number of advisory assignments per specific headline objectives/targets of the EU objectives. The AP reports on the contribution of each advisory assignment to:

- **Climate action**

The AP is to mark each assignment that provides advisory support related to the climate objective, using as reference the intervention fields contributing to climate change, as defined in the Methodology for InvestEU Key Performance and Monitoring Indicators related to the InvestEU financial and investment operations. The intervention fields would be used for determining whether an assignment contributes to the climate objective and not for quantitative dimension of the contribution.

- **Digitalisation**

The AP is to mark each assignment providing advisory support related to investments in digitalisation, using as reference the intervention fields, as defined in Methodology for InvestEU Key Performance and Monitoring Indicators.

- **Just transition**

The AP is to mark each assignment:

- that provides advisory support in territories located in or benefitting territories with an approved Territorial just transition plan as defined in Art. 7 of the Regulation of the European Parliament and of the Council establishing the Just Transition Fund.
- that is aimed at supporting the sectors and thematic areas set out therein.

- **Strategic investment, i.e. contributing to the provision of critical infrastructure and cybersecurity, space and defence**

The AP is to mark each assignment providing advisory support related to strategic investments, using as reference the intervention fields, as defined in Methodology for InvestEU Key Performance and Monitoring Indicators.

- **Cohesion Policy objective, as defined in Article 5 of the Common Provisions Regulation (Regulation (EU) 2021/1060)**

The AP is to mark each assignment that provides advisory support related to the Cohesion policy objectives, using as reference the intervention fields, as defined in Article 5 of the Common Provisions Regulation (Regulation (EU) 2021/1060).

- **Gender equality:** The AP has to earmark each assignment that has for an objective to contribute to gender equality.

- **Circular economy:** The AP has to earmark each assignment that has for an objective to contribute to circular economy.
- **Biodiversity and ecosystems:** The AP has to earmark each assignment that has for an objective to contribute to biodiversity and ecosystems.

Unit of measurement: Number

Number of assignments contributing to:

- Climate action
- Digitalisation
- Just transition
- Strategic investment
- Cohesion policy objective
- Gender equality
- Circular economy
- Biodiversity and ecosystems

Other objectives may be included and further developed, aligned with InvestEU Programme objectives, as agreed between the Parties.

4.1.3. Beneficiary's overall satisfaction with the advisory support received (Indicator 1.3 - KMI)

Methodology: This indicator measures beneficiary's overall satisfaction with the advisory support received under the InvestEU Advisory Hub for completed assignments as part of the technical report. The AP needs to collect the required data and report for each completed advisory assignment through a feedback form with specific questions on their perception of the 1) usefulness 2) relevance 3) quality and 4) impact of the provided advisory support, as well as 5) overall satisfaction of the beneficiary.

In case feedback is not received, the AP reports accordingly on this indicator for the respective advisory assignment. Closing the advisory assignment will not be dependent on getting the feedback from the beneficiaries of the advisory support.

Unit of measurement: Scale of satisfaction from 1(low) to 5(high) for each of the criteria

4.1.4 Status of the advisory support and actual costs of completed assignments (Indicator 1.4 - KMI)

Methodology: The AP is to report on the status of the assignments as part of the technical report. In addition, an updated aggregate cost figure is required upon completion of the assignments, reflecting the total expenses financed from InvestEU Advisory Hub Agreement budget. This should be based on the

underlying costs for providing advisory support, such as: number of FTEs multiplied by a unit cost, mission and consultancy costs including beneficiary contribution, where applicable.

#	Name of the indicator	Values	Comments
1	Status of the assignment or grant-financed advisory assistance	Ongoing Completed Completed over 12 months	Status of the assignment to record its lifecycle
2	Actual cost of the assignment or Grant-financed advisory assistance	Amount in EUR	After completion, an updated figure is required for the total aggregate cost (incurred cost) of the assignment financed from the budget of the InvestEU Advisory Hub Agreement, based on the underlying costs to provide the advisory support, such as: number of FTEs multiplied by a unit cost, mission and consultancy costs including beneficiary contribution, where applicable.

4.2. Operational reporting for specific type of advisory support

A. Project advisory support

The following indicators are reported for project advisory type of support as part of the technical report.

4.2.1. Expected mobilised investments as a result of the received advisory support for projects supported (Indicator 2.1)

Methodology: The AP is to report on the expected/estimated mobilised investments as a result of the received InvestEU Advisory Hub support for completed project-specific assignments.

Where relevant, the estimated amount of grant financing to be provided for the implementation of the investment project is required.

Unit of measurement: EUR

- Estimated mobilised investment, where relevant, estimated amount of grant financing mobilised.

4.2.2. Project maturity and progress to financing/ investment stage (Indicator 2.2 - KMI)

Methodology: This indicator tracks the progress/project maturity of each project advisory assignment towards reaching financing/ investment readiness stage. As part of the technical report the AP is to categorise maturity of underlying/supported project(s) at the start of each ongoing assignment and again at the end for all completed assignments following the scale of maturity below.

Maturity of projects:

- Policy need (Study/policy work)

- Project identification (project pipeline identification within masterplans, Investment Platform creation, etc.)
- Project development (support to feasibility studies, business plans, etc.)
- Investment ready (financial structuring, last mile advisory)
- Project implementation (support during the implementation phase, procurement, support to the project implementation unit, etc.)

4.2.3. Follow-up on investment/ financing status of completed advisory assignments (Indicator 2.3)

Methodology: This indicator provides follow-up on the project's investment/financing status including source of financing, obtained through annual surveys of relevant counterparts 12 months after the completion of each project advisory assignment. This shall be done, inter alia, to measure and confirm the link between the supported assignments by the InvestEU Advisory Hub and financing support through the InvestEU Fund and other sources of financing. The financing status should be reported as part of the technical report by the following categories:

Sources of financings

- InvestEU IP financing
- Non-InvestEU IP financing
- Public financing
- Private financing (banks, etc.), investment platforms, where relevant
- EU and/or MS programmes (e.g. ERDF, CF, JTF, PSF, ReactEU, CEF, Horizon Europe, RRF, MS, EIC contribution)
- Beneficiary's own resources
- Abandoned project/ changed scope
- No progress/information available

Unit of measurement: EUR

The AP should aim at receiving the status of financing of each supported project advisory assignment. However, in the event of failure to receive such information, no progress/information available can be reported.

a. Reporting requirements for specific project advisory assignments

The following indicators apply only to specific project advisory assignments, only where relevant.

4.2.4. Estimated contribution to the greenhouse gas reduction of the projects receiving advisory support, where relevant (Indicator 2.4)

To be reported for advisory assignments related to providing advisory support to projects, where such data is provided in a comprehensive analysis, such as feasibility study, cost-benefit analysis, etc.

Methodology: This indicator measures the contribution of the project supported by the InvestEU Advisory Hub to the greenhouse gas (GHG) emission reduction. The AP is to report in the technical report at the end

of the project advisory assignment, where data is available from a comprehensive analysis, such as feasibility studies/ cost-benefit or other analyses.

Unit measurement: CO2 ton eq. / y

4.2.5. Estimated contribution to renewable energy production or energy savings for projects that received advisory support, where relevant (Indicator 2.5)

To be reported for assignments where advisory support is provided to projects mainly but not limited to the energy sector, and where such data is provided in a comprehensive analysis, such as feasibility study, cost-benefit analysis, etc.

Methodology: The indicator measures the estimated reduced energy consumption and energy produced from RES. The AP is to report in the technical report at the end of the project advisory assignment, where data is available from feasibility studies/ cost-benefit or other analyses.

Unit of measurement:

Estimated energy savings (GWh/y)

Estimated renewable energy produced (GWh/y)

4.2.6. Estimated contribution to the NOx emission reduction, modal shift and saved time for projects that received advisory support, where relevant (Indicator 2.6)

To be reported for advisory assignments where advisory support is provided to projects in the transport sector and where such data is provided in a comprehensive analysis, such as feasibility study, cost-benefit analysis, etc.

Methodology: The indicator measures the estimated contribution of the project supported by the InvestEU Advisory Hub to the NOx emission reduction, modal shift and saved time. The AP is to report in the technical report at the end of the project advisory assignment in the transport sector, where data is available from feasibility studies/ cost-benefit or other analyses.

Unit of measurement:

- Estimated contribution to the NOx reduction (ton eq./y)
- Estimated change in modal share (% trips by less polluting transport mode)
- Estimated saved time due to the project (hours/y)

4.2.7. Number of investment platforms supported and established with InvestEU Advisory Hub support (Indicator 2.7)

To be reported only for advisory support provided to the establishment of investment platforms.

Methodology: The indicator measures the total number of investment platforms supported and/or established with the InvestEU Advisory Hub support. The AP is to report in the technical report on the

number of investment platforms advised by the AP in providing advisory support for establishment or deployment of investment platforms.

Unit of measurement: Number

Number of Investment Platforms supported

Number of Investment Platforms established and/or implemented

B. Capacity building support

The following indicators are reported only for capacity building type of support.

4.2.8. Number of capacity building activities by type (Indicator 3.1 - KMI)

Methodology: This indicator measures the number of capacity building activities organised by the AP, distinguishing where a clearly identifiable audience is available. AP report on this indicator in the technical report.:

- Trainings/workshops/seminars/webinars and e-learning (identified audience).
- Focus and working groups for discussion and exchange, incl. roundtables and coaching sessions.
- Multimedia and Online tools, manuals and guidelines (wider audience - not identified).

Measurement unit: Number

4.2.9. Participants' satisfaction in capacity building activities, (Indicator 3.2 - KMI)

Methodology: The indicator tracks the participants' satisfaction of the quality of capacity building activities, such as trainings/workshops/seminars/ webinars and e-learning with identified audience.

Feedback forms to be filled in by the participants after each capacity building activity, such as trainings/workshops/seminars/ webinars and e-learning with identified audience with questions on their perception of satisfaction regarding 1) topics covered; 2) delivery method chosen; 3) quality of delivery; 4) quality of teaching material; 5) organization/logistics; 6) overall.

The data is to be provided in the technical report by each AP for each capacity building activity.

Unit of measurement: Scale of satisfaction from 1(low) to 5(high) for each of the criteria

In case feedback is not received or not applicable "Feedback not received (FBNR)" value can be submitted.

4.2.10. Number of final beneficiaries, people trained, and training days delivered by type of final beneficiary (Indicator 3.3 - KMI)

Methodology: The indicator measures the total number of final beneficiaries (e.g. NPBs, financial and non-financial intermediaries, MS authority, etc.), people trained by type of final beneficiary and number of training days delivered. These indicators are only related to capacity building activities, such as trainings, seminars, workshops where the audience is clearly identified. APs report on these indicators in the technical report.

#	Name of the indicator	Values	Comments
1	Type of beneficiaries	NPB (Non-) Financial intermediary MS authority Other	Multiple values possible
2	Number of beneficiaries	Number of beneficiaries for each type NPB (Non-) Financial intermediary MS authority Other	To be provided as an aggregate in the format Number type 1/Number type 2/Number type 3/Number type 4
3	Number of people trained	Number of people trained for each beneficiary type: NPB (Non-) Financial intermediary MS authority Other	To be provided as an aggregate in the format Number type 1/Number type 2/Number type 3/Number type 4
4	Training days delivered	Total number of training days delivered.	Number of days the training lasted. Days the trainer delivered content.

C. Market development activities

The following indicators are reported only for market development type of advisory support.

4.2.11. Number of awareness raising events by location and number of participants registered and attending (Indicator 4.1 - KMI)

Methodology: The indicator measures the total number of awareness raising events organized by the AP by location and number of participants attended. APs report on these indicators in the technical report.

Unit of measurement: Number

- Number of awareness raising events by location.
- Number of participants registered and attending.

4.2.12. Participants' satisfaction in awareness-raising events (Indicator 4.2 - KMI)

Methodology: The indicator measures participants' satisfaction of the quality and reach of an awareness-raising event related to a specific assignment and can be used in planning of subsequent events.

Feedback forms to be filled in by the participants during and after each awareness-raising event with questions on their satisfaction regarding 1) topics covered; 2) delivery method chosen; 3) quality of delivery; 4) quality of provided material (where applicable); 5) organization/logistics; 6) overall.

The data is to be provided in the technical report by each AP for each awareness-raising event by location.

Unit of measurement: Scale of satisfaction from 1(low) to 5(high) for each of the criteria.

In case feedback is not received or not applicable “Feedback not received (FBNR)” value can be submitted.

4.3. Types and frequency of reporting

Unstructured reports are typically in PDF format and their content is not automatically processed. They contain an overview of updates and trends on the various Advisory Initiatives, descriptive and graphical representation of the KPI data submitted in the annual structured report, financial information on the implementation of the initiatives and success stories on flagship assignments.

Structured reports are in XML format and their content is automatically processed. Content of structured reports is provided by the Commission to APs through data dictionary and XML templates. The table below summarizes the required frequency and deadlines for reporting under the InvestEU Advisory Hub.

Report name	Frequency	Deadline	Format
Annual technical report	Annual	15/02	Structured
Annual technical report ³	Annual	End of reporting period + max. 60 days	Unstructured
Semi-annual technical report	To be discontinued after amendment of IEU Regulation	31/07	Structured
Request and Assignment update	Bi-monthly from April 2025 ⁴	Bi-monthly from April 2025. First report due 15 May 2025 (covering March-April), then due within 15 days after each period.	Structured
Success stories	Ad-hoc	Not applicable	Unstructured

³Progress or final report (operational and financial narrative) in accordance with Articles 3 and 17.2 of the General Conditions – Annex II to the Contribution Agreement.

⁴ Bi-monthly reporting starts with the first report due on 15 May 2025 (covering March-April).

Annex 1 Types of advisory support

1. Project Advisory

1.1 Project identification/generation

- Advice in relation to sector strategic investment planning (incl. conducting related market studies).
- Advice in the identification of investment opportunities, development of a pipeline of projects, development of project concepts.
- Provide opinions on project proposals.

1.2 Project preparation & development

- Advice on project feasibility, including guidance and comments on master plans, pre-feasibility and market studies, project feasibility studies, including legal, social and environmental aspects.
- Review of project applications before submission for funding/financing.
- Advice on project structuring, including review of business plans, eligibility criteria, project-financing structure.
- Advice on Public-Private Partnerships in relation to legal and regulatory aspects, advice on preparing, approving and managing PPPs.
- Advice on ex-ante and ex-post environmental impact assessments, monitoring and evaluation.
- Guidance and support with environmental assessments and permits stemming from the EU environmental legislation (e.g. Environmental Impact Assessment, Appropriate Assessment under the Habitats Directive, Assessment under the Water Framework Directive, permit required under the Industrial Emissions Directive etc.).

1.3 Planning & implementation of investment projects

- Implementation, management and operation of investment projects.
- Monitoring during and post implementation of investment projects.
- Closure phase of projects.
- Evaluation and optimization of investment projects.

1.4 Financial structuring

- Advice on structuring projects for improving their access to finance, including advice on the business model, funding sources and financing structure, capital structure, debt and risk allocation.
- Advice on improving investment conditions for non-project activities such as developing business cases for new financing schemes, improving the availability of financial services.
- Support to fund structuring, implementation and management of financial instruments.

- Support in how to combine different types of European funding/financing with other sources of financing.

1.5 Establishment of investment platforms and blending facilities

- Advisory support in designing, structuring and setting up of investment platforms for aggregating projects, including cross-border and macro-regional investment platforms.
- Support for the establishment of investment platforms that bundle small and medium-sized projects in one or more Member States by theme or by region.
- Support in setting up blending facilities.

2. Capacity building

Can be provided in the form of specific training(s) or other type of capacity building activities to project promoters, financial and other intermediaries, including for the planning, development and implementation of investment projects.

2.1 Strengthening capacity and investment readiness of organizations

- Support in building institutional and administrative capacity in financial management, regulatory aspects and sector related technical expertise.
- Development of manuals, methodological guidance, factsheets, e-learning.
- Providing training, seminars, workshops and networking events.
- Exchange of expertise between MS or from the EU level to the national level.
- Exchange of expertise between sectors.
- Facilitate the establishment of collaborative platforms for peer-to-peer exchange.
- Share data, knowhow and best practices to support project pipeline and sector development.
- Develop organisational capacity, skills and processes and accelerate investment readiness of organisations.
- Support for financing and investment operations for the benefit of entities that face difficulties in obtaining access to finance, including through support to develop risk assessment capacity or sector specific knowledge.
- Mentoring for SMEs/micro-enterprises in terms of coaching and training in project delivery.
- Support for start-ups, including protecting their research and innovation investments by obtaining intellectual property titles, such as patents.
- Coaching and training in project identification and project preparation.

2.2 Environmental and/or social sustainability structuring and impact assessments

- Sustainability enhancing structured finance services, including for nature based and circular economy-based solutions.
- Guidance and support with environmental proofing and accounting standards.

- Coaching and training in ex-ante and ex-post environmental impact assessments, monitoring and evaluation, environmental assessments and permits stemming from the EU environmental legislation (e.g. Environmental Impact Assessment, Appropriate Assessment under the Habitats Directive, Assessment under the Water Framework Directive, permit required under the Industrial Emissions Directive etc.).

2.3 Procurement and compatibility with State aid rules

- Support with market analysis, developing tender documents and implementing procurement procedures, related to investment projects.
- Guidance on possible State aid implications including the proportionality of the envisaged intervention to minimize market distortions, compliance with *de minimis* regulation, block exemption regulations, notification procedures, related to investment projects.

3. Market development

3.1 Market development activities

- Market studies and ex-ante assessments

3.2 Communication and awareness raising

- Provision of workshops, seminars, networking events and conferences in MS and at the EU level.
- Web platforms for communication purposes and sharing best practices, help desks.