

APPENDIX 3

Modalities of the investment proposal submission process

MODERNISATION FUND
Accelerating the transition to climate neutrality

**Modalities of the investment
proposal submission process**

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MODERNISATION FUND – Accelerating the transition to climate neutrality

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<https://modernisationfund.eu/>

Appendix 3 Modalities of the investment proposal submission process

This document aims to provide instructions for submitting investment proposals to the Modernisation Fund or exchanging documents with EIB's Modernisation Fund Unit.

Proposal forms

To submit investment proposals to the Modernisation Fund, Beneficiary Member States (BMS) must provide the information relating to the proposal in the investment proposal forms available on the Modernisation Fund website:

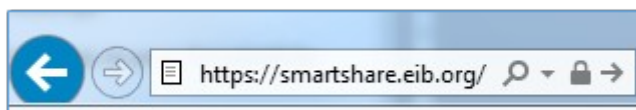
<https://modernisationfund.eu/documents/>

Once filled out, the proposal forms and the supporting documents must be sent to the EIB through the file sharing platform **Smartshare**.

Once the investment proposal has been received, you will receive a **receipt confirmation email** from the EIB.

What is Smartshare

- **Smartshare is** the EIB Group platform to access and share files, in a secure manner;
- **A platform accessible from a browser;**



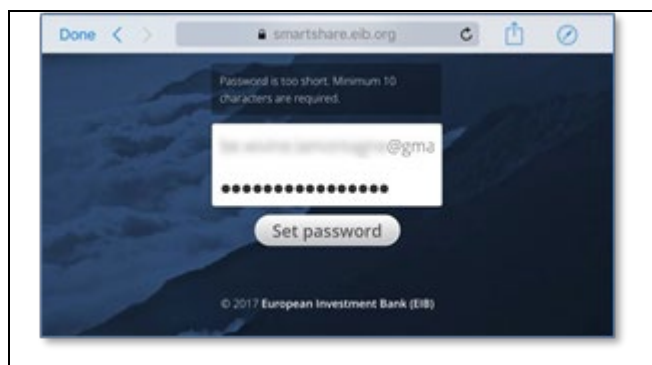
Compatible browsers are:

- ❖ Edge (current version on Windows 10)
 - ❖ IE11+ (except Compatibility Mode)
 - ❖ Firefox 62 or 60.2 ESR
 - ❖ Google Chrome 68+
 - ❖ Safari 11
- **Less restrictive than email attachments:** files of all formats, up to a size of 2 GB, can be shared;
 - **For the submission of Investments Proposals to the Modernisation Fund, one Guest account has**

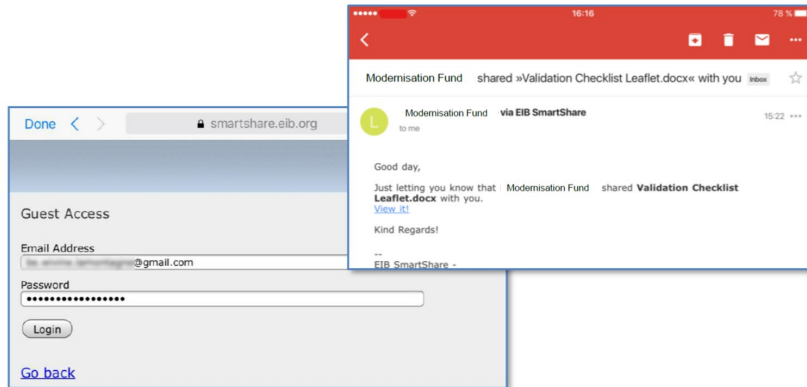
been created for each BMS. The Guest account gives access to a folder specific to each BMS where investment proposals and supporting documents can be securely uploaded.

How to use Smartshare

- Once the folder is shared, you will receive 2 emails notifications to:
 - 1) **Setup your password** – The first time you have been shared an item, you are notified and invited to set up the account:
 - ❖ In the email received, click the link **setting a password** valid for 12 hours. If the link has expired, please type <https://smartshare.eib.org> and create your account.
 - ❖ The login is your email address to whom the notification was sent.
 - ❖ Please create your password. **The password must have at least:**
 - **10 characters,**
 - **1 uppercase letter,**
 - **1 number, and**
 - **1 special character.**
 - ❖ Click on **Set password.**



- 2) **Access your Guest account** – Once the password is set up, you are redirected to the SmartShare login page. You can also click on the link provided in the second notification email, notifying that an item had been shared with you.
 - From the email, click on **View it!**
 - Fill in the email address and password



• **Uploading files:**

Upload files	
<ul style="list-style-type: none"> ⚙️ Click the Upload menu item. ⚙️ Select the item(s) to upload ⚙️ or drag & drop into the SmartShare window (not possible with Internet Explorer). 	

• **Downloading files and folders:**

Download files and folders	
Single file	Multiple files or folders
<ul style="list-style-type: none"> ⚙️ Click the document name or ⚙️ click the 3 ⋮ dots. ⚙️ Click the download menu item. 	<ul style="list-style-type: none"> ⚙️ Select the check box of the each item. ⚙️ Click the download button. ⚙️ A folder will be downloaded as zip file.

- **Manage the files wisely:**

- ❖ consider protecting confidential files with an additional password before uploading them (for example within Office 2016 or with the password field within 7-Zip); the password should be shared via separate communication;
- ❖ do not delete any shared file;
- ❖ do not share your password for the Smart Share account.

How to organise the files:

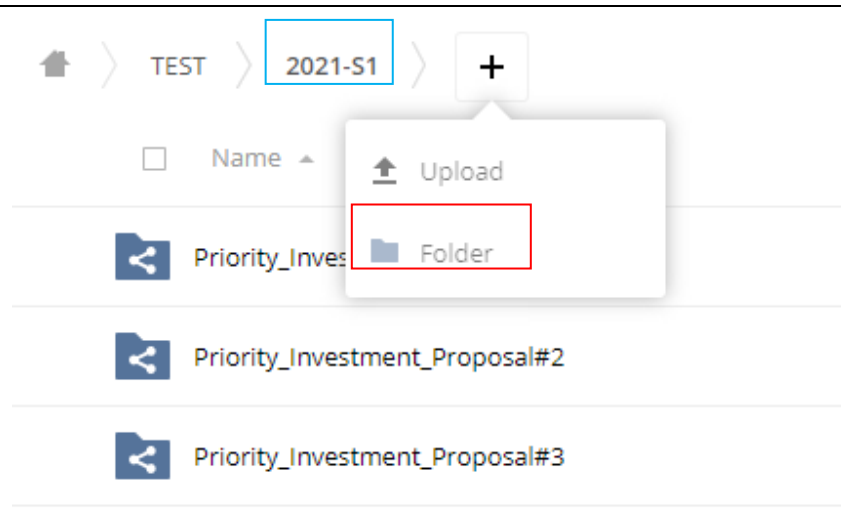
- In your shared folder, a subfolder is created for each investment cycle where you can upload the investment proposals for the respective investment cycle.



- Create a separate folder for each investment proposal

Create a folder for each Investment Proposal

- ❖ Go to the folder corresponding to the selected investment cycle (e.g. 2021-S1)
- ❖ Select the **+** menu item
- ❖ Click the **Folder** menu item

A screenshot of a file explorer interface. The breadcrumb path is 'TEST > 2021-S1 > +'. The '2021-S1' folder is highlighted with a blue box. A context menu is open over the '+' button, showing 'Upload' and 'Folder' options. The 'Folder' option is highlighted with a red rectangular box. Below the menu, there are three files: 'Priority_Inves...', 'Priority_Investment_Proposal#2', and 'Priority_Investment_Proposal#3', each with a blue folder icon.

Re-set your password:

- You can reset your password:
 - ✦ When you access Smartshare, log on the Guest account using <https://smartshare.eib.org>
 - ✦ If you insert the wrong password, you are invited to try again or you can click on **Forgot password?**
 - ✦ By clicking on **Forgot your password?** the system sends an email to your email address.