BAFA application checklist for individual energy measures

Prepare your application for funding for an individual energy renovation measure in Germany (BEG EM). Check the funding route, documents, contract and sequence. Tick off completed checks and record any open questions.

1. Funding route and technical suitability

- ☐ Record the existing building, building type and planned energy improvement.
- ☐ Identify the measure: building envelope, building services other than heating, heating optimisation or a building network administered by BAFA.
- ☐ Check responsibility: Funding for replacing the heat generator is generally administered by KfW.
- ☐ Have technical minimum requirements such as U-values, efficiency and installation standards checked before ordering.
- ☐ Confirm the required specialist: An energy efficiency expert is needed for the building envelope and services other than heating; confirmation for heating optimisation depends on the funding case.

2. Applicant, building and agreed services

- ☐ Prepare the applicant's name, address and contact details, plus the address of the property receiving the investment.
- ☐ Clarify ownership or usage rights and authority to act; for an owners' association (Wohnungseigentümergemeinschaft, WEG), check responsibilities and resolutions.
- ☐ Record building use, construction year or building application/notification date and number of residential units.
- ☐ List funding already applied for or received for the same measure.
- ☐ Agree the scope of services, responsibilities, deadlines and costs of changes with your adviser and contractor.

Notes / missing documents

Pegasus Energieberatung · pegasus-energieberatung.de
Phone +49 40 645 335 90 · kontakt@pegasus-beratung.de

BAFA / BEG EM: Documents and process

3. Quotation and technical documents

- ☐ Obtain an itemised quotation; clearly allocate costs to the energy measure, associated works and the relevant trades.
- ☐ Collect product data, technical sheets and required calculations; provide a traceable breakdown of eligible expenditure.
- ☐ Agree the intended implementation period with everyone involved.
- ☐ Identify any existing individual renovation roadmap (individueller Sanierungsfahrplan, iSFP) and the corresponding measure if iSFP benefits are to be assessed.
- ☐ For work you intend to do yourself, clarify material evidence, invoice requirements and confirmation of proper execution in advance.

4. Contract and application sequence

- ☐ Before applying, have a signed supply or service contract with the required suspensive or resolutory condition linked to the funding approval.
- ☐ Agree the funding condition in time: Adding it later, or including only a right to withdraw if funding is refused, is insufficient.
- ☐ Include the expected implementation date within the approval period; where several trades are involved, have the appropriate conditional contract checked.
- ☐ Do not start delivery, installation or construction yet. Distinguish this from planning, advice and the required conditional contract.
- ☐ Prepare the technical project description (Technische Projektbeschreibung, TPB) and valid TPB-ID where required; submit the application online yourself or through an authorised representative and check all details.

Notes / missing documents

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BAFA / BEG EM: Completion and open questions

5. Approval and implementation

- ☐ Wait for the acknowledgement of receipt and check when work may start. Starting before the grant decision is at your own financial risk.
- ☐ Read the decision, conditions and applicable deadlines; record them and coordinate with everyone involved.
- ☐ Carry out the measure as applied for and to the technical requirements; check changes for funding consequences before implementation and document them.
- ☐ Have itemised invoices issued to the applicant and pay them in full.
- ☐ Collect payment evidence and the required contractor declarations.

6. Evidence and completion

- ☐ Have the responsible energy-efficiency professional or authorised contractor prepare the technical project verification (TPN) and TPN-ID; check the ID's validity before submitting.
- ☐ Submit proof of use of funds (Verwendungsnachweis), required invoices and confirmations through the BAFA portal within the applicable deadline.
- ☐ Keep the submission confirmation and respond to the funding body's questions by the specified deadline.
- ☐ Retain original documents, approvals and recorded changes for possible checks.
- ☐ Check the final grant assessment and payment: An acknowledgement or approval is not yet a payment.

Notes on use

This checklist helps prepare common BEG EM applications. Record missing documents; owners' associations, mixed use, listed buildings, self-performed work and building networks need individual review. The programme documents in force when applying and the individual grant decision govern the case. Complete documents do not guarantee approval or a grant amount. Funding for residential energy advice (EBW) is a separate procedure.

Sources and online checklist

BEG FAQ: Contract before application (German)

BEG FAQ: Funding condition and sample wording (German)

BAFA: General BEG EM application guidance (German)

BEG FAQ: Technical project verification (German)

Back to the Pegasus online checklist

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Phone +49 40 645 335 90 · kontakt@pegasus-beratung.de