

Application Notes  
(AN-LIMSS(2)(EOO))



# Second Round Lift Modernisation Subsidy Scheme

(Applicable to Elderly Owner-Occupier)

Enquiry  
**3188 1188**



發展局  
Development Bureau

機電工程署  
EMSD



# AN-LIMSS(2)(EOO)

## Introduction

The Government has partnered with the Urban Renewal Authority (URA) to implement the "Lift Modernisation Subsidy Scheme" (LIMSS), to promote lift modernisation <sup>Note 1</sup> in the community through provision of financial incentive and appropriate professional support to owners of private residential or composite (commercial and residential) in need, thereby enhancing lift safety.

Note 1: Applicable to traction lifts only.

## 1. Eligibility Criteria

- 1.1 **The Applicant must be** a holder of valid Hong Kong identity card; and
- 1.2 The Applicant must be **aged 60** or above (as indicated on Hong Kong identity card) on or before the application deadline specified in Paragraph 6.7 of this Application Notes; and
- 1.3 The Applicant must be the **alive** owner of a residential unit in an approved building under the LIMSS <sup>Note 2</sup> at the date of the application deadline as specified in Paragraph 6.7 of this Application Notes and the unit is solely for the purpose of self-occupation by him/her or his/her immediate family members <sup>Note 3</sup>; and

Note 2: For a building owned by a Civil Servants' Co-operative Building Society, members of the society may apply for subsidy for elderly owner-occupiers under the LIMSS.

Note 3: "Immediate family members" mean spouse, parents, children, dependent brothers and sisters, grandparents, grandchildren, spouse's parents.

- 1.4 The target building has been granted the "Approval-in-Principle Letter" for the LIMSS; and
- 1.5 The Applicant must not at the same time be a recipient of any public housing benefits, subsidies or allowances (e.g. holding public housing tenancy or public housing ownership with alienation restrictions (except building owned by Civil Servants' Co-operative Building Society)), except the unit in application for the LIMSS.
- 1.6 The Steering Committee comprising the Development Bureau, Electrical and Mechanical Services Department and URA ("Steering Committee") shall review the particular circumstances of each special case to determine the eligibility and subsidy level.
- 1.7 Regardless of the number of residential units owned by an Applicant for the purpose of self-occupation by him/her or his/her immediate family members, the Applicant may only apply for subsidy for any one of his/her occupied residential units. If the Applicant has received subsidy for elderly owner-occupiers under the LIMSS for a certain unit, he / she shall not be entitled to any subsidy for elderly owner-occupiers under the LIMSS again if he/she subsequently moves to another unit in a building under the LIMSS owned by him/her. The Applicant is only entitled to subsidy for elderly owner-occupiers under the LIMSS once. After the application is approved, the Applicant is not eligible for applying subsidy for elderly owner-occupiers under the LIMSS by his/her other residential units. In case of dispute, the case shall be passed to Steering Committee for handling.

# AN-LIMSS(2)(EOO)

## 2. Definition of Residential Unit

“Residential Unit” means an independent unit as registered in the Land Registry records or shown on the approved building plans, and the unit is used for residential purpose. If the Applicant lives in a unit in a composite building and the use of which has been changed from non-residential to residential purpose, he/she shall make a statutory declaration in accordance with the Oaths and Declarations Ordinance declaring that the unit is entirely for residential use (not as shophouses or involving any forms of commercial use)<sup>Note 4</sup>.

Note 4: Such statutory declaration shall only be used for the purpose of the application for subsidy under the LIMSS and the owners or occupiers shall not regard the same as any formal application for change of uses of the unit concerned to the relevant government departments, nor a formal authorisation or approval for the change of use of such unit granted by the government departments concerned. The approved uses of such unit as indicated on the relevant Occupation Permit shall not be changed because of such statutory declaration.

## 3. Level of Subsidy

3.1 Eligible elderly owner-occupiers of residential units in those buildings approved under the LIMSS may apply for subsidy of full cost<sup>Note 5</sup> of their contribution of works that have complied with the requirements of the LIMSS<sup>Note 5</sup> and consultancy fee of consultant appointed by the owners’ organisation of the building concerned (if applicable), subject to a maximum of HK\$50,000 per unit<sup>Note 7</sup>.

3.2 If the residential unit is co-owned by elderly owner-occupier(s) and non-elderly person(s), so long as the elderly Applicant lives in such residential unit, the eligible elderly Applicant may apply for subsidy of full cost of their contribution of works that have complied with the requirements of the LIMSS<sup>Note 6</sup> and consultancy fee of consultant appointed by the owners’ organisation of the building concerned (if applicable), subject to a maximum of HK\$50,000 per unit<sup>Note 7</sup>.

Note 5: Please refer to Paragraph 7.15 of “AN-LIMSS(2)”.

Note 6: Please refer to Paragraph 4 of “AN-LIMSS(2)”.

Note 7: For examples of the calculation of the subsidy level, please refer to Annex I of “AN-LIMSS(2)”.

3.3 Eligible Applicants should **fill in the “Integrated Building Rehabilitation Assistance Scheme (IBRAS) Application Form for Owners of Individual Units” (“Application Form”)** by themselves and submit the Application Form to URA within the application period specified in Paragraph 6.7 of this Application Notes.

## 4. Other Terms

4.1 Even if the Applicant is only one of the co-owners of the unit, he/she may also apply for full subsidy for elderly owner-occupiers.

4.2 Once the Applicant is granted with the subsidy for elderly owner-occupiers under the LIMSS, the Applicant will not be entitled to other subsidies under the LIMSS. For examples of the calculation of the subsidy level, please refer to Annex I and Annex II of “AN-LIMSS(2)(EOO)”.

## **AN-LIMSS(2)(EOO)**

- 4.3 If there is any overlap of the subsidies received under the LIMSS for any items of works which have already been subsidised by other building rehabilitation assistance schemes provided by Hong Kong Housing Society or URA (including “Common Area Repair Works Subsidy”, “Operation Building Bright 1.0” and “Operation Building Bright 2.0”) and “Buildings Energy Efficiency Funding Scheme”, etc. , URA may withdraw the subsidy or deduct the amount of subsidy of such item under the LIMSS which has been granted with subsidies / grant under other schemes.
- 4.4 The Applicant or the related building may apply for “Building Maintenance Grant Scheme for Elderly Owners” provided by the Hong Kong Housing Society or “Building Safety Loan Scheme” provided by the Buildings Department or “CLP Eco Building Fund” or “Smart Power Building Fund” if in need. Nonetheless, the total amount of subsidy/loan received under the LIMSS, the “Building Maintenance Grant Scheme for Elderly Owners” ,the “Building Safety Loan Scheme” , “CLP Eco Building Fund” and “Smart Power Building Fund” shall not exceed the actual costs paid by the Applicant for the relevant works.
- 4.5 The Applicant agrees and understands that it is unavoidable to have discrepancies between the final costs of the lift modernisation works and the cost estimate provided by URA. The Applicant shall not raise any objection thereto.
- 4.6 URA reserves the right not to accept an application under the following situations:
- (a) the Applicant has engaged or is engaging in (or URA has reason to believe that the Applicant has engaged or is engaging in) any act or activity that is likely to constitute or cause the occurrence of any offence endangering national security or which would otherwise be contrary to the interest of national security; or
  - (b) such non-acceptance is in URA’s opinion necessary for safeguarding national security, or protecting public interest, public morals, public order or public safety.

## **5. Release of Subsidy**

- 5.1 URA will release the subsidy to the Applicant by phases ( maximum of 4 phases), according to the progress of works and the subsidy amount of the relevant lift modernisation works. The Applicant may apply for subsidy of consultancy fee (applicable to cases where the consultant is appointed by the owners’ organisation) together with the application for the subsidy mentioned above. Relevant owners’ organisation must distribute the subsidies to elderly owner-occupiers approved to join the LIMSS in accordance with the funding allocation form provided by URA.
- 5.2 Depending on the circumstances of individual cases, URA may disburse the subsidy for elderly owner-occupiers under the LIMSS directly to individual applicants if the applicants have obtained confirmation from the owners' organisations of their respective buildings that they have paid for the cost of the lift moderisation works.
- 5.3 In general, if the applicant’s application was vetted eligible with relevant grant agreement signed, URA will arrange for release of the subsidy within 30 days after receiving the claim form and all required documents from respective owners’ organisation.

## AN-LIMSS(2)(EOO)

### 6. Submission of Application Form and Vetting Procedures

- 6.1 The Applicant must fill in and submit the **Application Form** to URA before the application deadline as specified in Paragraph 6.7 of this Application Notes.
- 6.2 The Application Form must be submitted together with photocopies of the following supporting documents:
- 6.2.1 Hong Kong identity card of the Applicant;
  - 6.2.2 The latest demand note for rates of the self-occupied unit;
  - 6.2.3 Documentary proof of self-occupation of the unit under the application (e.g. public utility bills); and
- 6.3 The completed Application Form and the supporting documents specified in Paragraph 6.2 must be submitted by the Applicant to the URA within the application period by any of the following methods:
- (a) **Online application:**  
Website: <https://www.brplatform.org.hk/e-application>  
(The time of receipt of by URA of an on-line application will be adopted as the submission time of that application)
  - (b) **Submit in person** (the submission date is determined by the date of receipt of the Application Form acknowledged by URA) **or by post** (the date of the stamp chop will be taken as the submission date of the application) to URA Office:
- URA Office Address: Flat B, G/F, 777-783 Yu Chau West Street, Kowloon
- 6.4 If there are more than one eligible applicant for the same unit, all such eligible Applicants may make a joint application by submitting one Application Form.
- 6.5 URA will review all information submitted by the Applicant. In case of insufficient information, URA may request the Applicant to submit additional information to avoid any delay in the approval process.
- 6.6 Once the application is approved, URA shall require the Applicant to sign a grant agreement.
- 6.7 The Application Form must be submitted by the Applicant within two months from the date of issue of the LIMSS “Approval-in-Principle Letter” by URA to the relevant building, or within two months from the date of issue of the first demand notes for the contribution to costs of lift modernisation works issued by the owners’ organisation to the Applicant, **the later of which shall be regarded as the application deadline**. URA reserves the right to reject any application not submitted within the application period.
- 6.8 In case of any dispute relating to the eligibility for application or release of subsidy, the decision of URA shall be final and conclusive.
- 6.9 Notwithstanding any contrary provision contained in this Application Notes, URA reserves the right to reject the application, to stop release of subsidy, to recover any released subsidy

## AN-LIMSS(2)(EOO)

or to adjust the amount of subsidy at any stage on reasonable grounds or in reasonable circumstances and the Applicant shall raise no objection.

6.10 Irrespective of whether a consultant is arranged by URA or appointed by the owners' organisation of the building concerned (collectively referred to as 'such consultant' hereafter), such consultant does not represent the URA and has no right to make any statements or warranties on behalf of URA. Such consultant shall only provide co-ordination and consultancy services with regard to the LIMSS. The owners' organisation of the building concerned and the Applicant shall not hold URA responsible nor claim URA for damages or losses for any and all services provided by such consultant.

### Points to Note:

- (1) The contents in this Application Form and these Application Notes are not legally binding on URA. URA is not liable to any person for any loss or damages which may be incurred or sustained by relying on any information contained in the Application Form and these Application Notes and the Application Form.
- (2) URA reserves the right to modify the above contents at any time without prior notice. The web version shall prevail should there be any changes. Please refer to "Building Rehabilitation Platform" ([www.brplatform.org.hk](http://www.brplatform.org.hk)) for the latest version.
- (3) Any wilful misrepresentation or omission may lead to disqualification and court proceeding. The Applicant is reminded that it is a criminal offence to obtain any pecuniary advantage by deception.

Enquiry Hotline: 3188 1188
----------------------------

# AN-LIMSS(2)(EOO)

Annex I

## Calculation for Elderly Owner-Occupiers (EOO) Subsidy (Example 1)

Number of Lift	1
Amount for Lift Modernisation Works (lift works) used for calculation of Subsidy <sup>Note</sup>	\$900,000 <sup>Note</sup>
Number of residential unit owners (assuming each residential unit owner has the same undivided shares)	12
Amount of each unit owner has to bear for the lift works cost without subsidy Amount from the URA	$\$900,000 \div 12$ = \$75,000
Subsidy from the Lift Modernisation Subsidy Scheme (LIMSS) (for Building) (60% of the cost per elevator, up to a maximum of \$500,000)	\$500,000
Amount each unit owner has to bear the costs for the lift works with subsidy from the URA	$\$900,000 - \$500,000$ = \$400,000
<b>Regular residential unit owners (owners who do not eligible for the EOO Subsidy)</b>	
Amount of Subsidy receive from the lift works (Building)	$\$500,000 \div 12$ = <b>\$41,667</b>
Amount each regular unit owner has to bear for the cost of the lift works	$\$400,000 \div 12$ = \$33,333
<b>Eligible EOO</b>	
Subsidy Cap (maximum total EOO subsidy for lift works is \$50,000)	\$50,000
Amount of Subsidy receive from the LIMSS (for Building)	$\$500,000 \div 12$ = <b>\$41,667</b>
Additional Subsidy receive by EOO	$\$50,000 - \$41,667$ = <b>\$8,333</b>
Amount of each EOO owner has to bear for the lift works	$\$75,000 - \$41,667 - \$8,333$ = \$25,000

**Note:** The contract price or the valuation by the URA for the lift modernization works, whichever is lower, shall be used as the standard.

Based on the above assumptions:

- i. If all unit owners in the building (including regular owners and EOO owners) have paid \$75,000 to the owners' organization, the owners' organization should refund a total of \$41,667 to each owner in phases after receiving the subsidy from the URA in phases.
- ii. If an eligible elderly owner has paid \$75,000 to the owners' organization but has not made a special request, when the URA disburses the subsidy, including the EOO Subsidy (subject to a maximum of \$50,000 per unit), in phases according to the progress of the work, the owners' organization should refund a total of \$50,000 (\$41,667 plus \$8,333) to the eligible elderly owner in phases.
- iii. If an eligible elderly owner has paid \$75,000 to the owners' organization and made an application to the URA providing proof of the settlement of \$75,000 payment, the Authority may directly disburse the EOO subsidy of \$8,333 to the eligible elderly owner, while the remaining subsidy of \$41,667 will be released to the owners' organization. The owners' organization must then refund the \$41,667 to the eligible elderly owner in phases as described in paragraph i. above after receiving the subsidy from the URA.
- iv. The URA will release the subsidy to the eligible EOO owner-occupier by phases (maximum of 4 phases) according to the progress of the work and the subsidy amount of the relevant lift modernization works.

# AN-LIMSS(2)(EOO)

Annex II

## Calculation for Elderly Owner-Occupiers (EOO) Subsidy (Example 2)

Number of Lift	1
Amount for Lift Modernisation Works (lift works) used for calculation of Subsidy <sup>Note</sup>	\$900,000 <sup>Note</sup>
Number of residential unit owners (assuming each residential unit owner has the same undivided shares)	24
Amount of each unit owner has to bear for the lift works cost without subsidy Amount from the URA	$\$900,000 \div 24$ $= \$37,500$
Subsidy from the Lift Modernisation Subsidy Scheme (LIMSS) (for Building) (60% of the cost per elevator, up to a maximum of \$500,000)	\$500,000
Amount each unit owner has to bear the costs for the lift works with subsidy from the URA	$\$900,000 - \$500,000$ $= \$400,000$
<b>Regular residential unit owners (owners who do not eligible for the EOO Subsidy)</b>	
Amount of Subsidy receive from the lift works (Building)	$\$500,000 \div 24$ $= \mathbf{\$20,834}$
Amount each regular unit owner has to bear for the cost of the lift works	$\$400,000 \div 24$ $= \$16,666$
<b>Eligible EOO</b>	
Subsidy Cap (maximum total EOO subsidy for lift works is \$50,000)	\$50,000
Amount of Subsidy receive from the LIMSS (for Building)	$\$500,000 \div 24$ $= \mathbf{\$20,834}$
Additional Subsidy receive by EOO	$\$37,500 - \$20,834$ $= \mathbf{\$16,666}$
Amount of each EOO owner has to bear for the lift works	$\$37,500 - \$20,834 - \$16,666$ $= \$0$

**Note:** The contract price or the valuation by the URA for the lift modernization work, whichever is lower, shall be used as the standard.

Based on the above assumptions:

- If all unit owners in the building (including regular owners and EOO owners) have paid \$75,000 to the owners' organization, the owners' organization should refund a total of \$41,667 to each owner in phases after receiving the subsidy from the URA in phases.
- If an eligible elderly owner has paid \$75,000 to the owners' organization but has not made a special request, when the URA disburses the subsidy, including the EOO Subsidy (subject to a maximum of \$50,000 per unit), in phases according to the progress of the work, the owners' organization should refund a total of \$50,000 (\$41,667 plus \$8,333) to the eligible elderly owner in phases.
- If an eligible elderly owner has paid \$75,000 to the owners' organization and made an application to the URA providing proof of the settlement of \$75,000 payment, the Authority may directly disburse the EOO subsidy of \$8,333 to the eligible elderly owner, while the remaining subsidy of \$41,667 will be released to the owners' organization. The owners' organization must then refund the \$41,667 to the eligible elderly owner in phases as described in paragraph i. above after receiving the subsidy from the URA.
- The URA will release the subsidy to the eligible EOO owner-occupier by phases (maximum of 4 phases) according to the progress of the work and the subsidy amount of the relevant lift modernization works.