

Energy Company Obligation (ECO4) Summary of updates in the ECO4 Project Forms

Introduction

This document outlines the changes that we have made to our ECO4 Project Forms following the ECO4.1 legislative amendments and feedback received from industry from our workshop on 15 February 2023.

Throughout all ECO4 Projects Forms formatting and wording updates have been made.

In all ECO4 Project Forms the following statement is added to ensure data protection laws:

“Ofgem also recommends that any additional evidence collected as part of these forms be handled as the final step in the process to adhere to Data Protection Act 2018 requirements”.

ECO4 Project Forms are now under version 2.0, except for the ECO Reporting and Evidencing Forum Terms of Reference, which is under version 1.0 (Former ECO4 Reporting Working Group). The reason for this is that we aim to streamline the forms version 2.0 with the ECO4 Delivery Guidance version 2.0.

Please note that the combined ECO4 and Great British Insulation Scheme forms are under different version control. However, we would like to assure you that there are no changes between them.

A. ECO4 Eligibility Requirements v2.0

1. Eligibility route formatting updated to make it look more streamlined.
2. Added clarity throughout forms clarity throughout as to form number and signatory.
3. Increased address box size.
4. Added declaration for occupier (tenant or owner occupier) to sign off that their details are correct.
5. Updated wording regarding EPCs to reference SAP and RdSAP assessments.
6. Changed formatting of landlord sign off to improve formatting and make it consistent with GBIS forms.
7. Removed the repeated sections of Details of Social Landlord.
8. Added reference to ECO4 requirement for additional evidence for eligibility through Child Benefit.
9. Added customer declaration to Data Use Declaration.

B. ECO4 Pre-Installation Project Survey v2.0

1. **Guidance:** Word “filled” is replaced by “completed”.
2. **Guidance Section A:** The completion of some questions in this section is optional for ECO4 Projects within the scope of PAS.
3. **Guidance Section E:** The completion of some questions in this section is optional for ECO4 Projects within the scope of PAS.
4. **Section A Question D13:** “No” tick box option is removed.
5. **Section C 2A:** The following are added to align with Great British Insulation Scheme heating controls section.
 - The existing number of radiators with TRVs:
 - The existing number of towel rails with TRVs:
6. **Section C 2B:** Smart meter advice question is moved from the ECO4 Post Installation Customer and Installer Declaration Form to this form to align with the Great British Insulation Scheme Pre-Retrofit Eligibility and Premises Declaration form.
7. **Section C 3:** Space is added to support capture of details where more than one ESH exist in premise.
8. **Section D:** Floor plan is added.
9. **Section E1:** Spelling error is rectified.

C. ECO4 Pre-Installation Heating Checklist v2.0

1. **General changes:** Section G in version 1.1 is removed. Customer involvement and signature is no longer necessary in this form. Customer FTCH declaration is moved to section B in the ECO4 Eligibility Requirement form.
2. **Guidance Section A:** Section A is redesigned and simplified.
3. **Section A:** "No" tick box option is added.
4. **Section B Questions 4 and 5:** Questions are re-designed to simplify the data recorded.
5. **Section B Question 7:** PCDB option is added.
6. **Section B Questions 12 and 13:** Questions are added for future audit purposes.
7. **Section E:** Air Source Heat Pump (ASHP) preheating source option is added, including repair cost table in section Iiii.
8. **Section F Questions 1 and 2:** Box is added to record relevant details.
9. **Section F Footnote 15:** Footnote is updated to reflect the latest ECO4.1 legislative amendments.
10. **Section G Question 3:** Name of Retrofit Coordinator or DHC Operative box is added.
11. **Section G Question 1:** N/A tick box is added.

D. ECO4 Post Installation Customer and Installer Declaration Form v2.0

1. **General changes:** Word “filled” is replaced by “completed”.
2. **Guidance Section F:** The completion of some questions in this section is optional for ECO4 Projects within the scope of PAS.
3. **Section B Question 4:** Footnote 12 is added to clarify what should be selected when multiple standards apply to ECO4 Projects.
4. **Section C Loft Insulation:** The following tick boxes are updated to ≤ 100 or > 100 .
5. **Section C Heating Measures:** Issue with footnotes that were not aligning properly is rectified.
6. **Section C:** Pitched roof insulation PAS annex is updated to B10 as well as Room In Roof Insulation PAS annex to B12.
7. **Section C ESH:** Footnote 21 is added to clarify when you have more than one ESH installed in a premise where this should be recorded.
8. **Section C Solar PV:** This section is redesigned to capture more than one array.
9. **Section D:** More space and numbering are added throughout this section. Moreover, word “relevant” is updated by “appropriate”.
10. **Section D Question 3:** More space is added to enter details.
11. **Section D Question 2:** The following statement is removed to reflect the latest legislative amendments “Heat wholly or mainly from gas”.
12. **Section E Question 2:** Instead of using circles, tick boxes are included to choose the appropriate standards.
13. **Section E:** We have added more details to Footnote 26 to clarify what type of information needs to be recorded.
14. **Section F:** This section is redesigned to simplify the process of recording data.

E. ECO4 and The Great British Insulation Scheme and ECO4 Reporting Working Group Privacy Notice 2.0

Following the recent feedback received from both Great British Insulation Scheme Consultation and Forms circulation with industry we combined the ECO4 and Great British Insulation Scheme Privacy Notice document which is optionally used by members of the ECO Reporting and Evidencing Forum (Former ECO4 Reporting Working Group).

The version 2.0 of the ECO4 and The Great British Insulation Scheme and ECO4 Reporting Working Group Privacy Notice does not have any changes when compared to the version published on 24 May 2023 alongside the set of The British Insulation Scheme forms.

F. Pre-Existing Loft Insulation Declaration v2.0

Following the recent feedback received from both Great British Insulation Scheme Consultation and Forms circulation with industry we combined the loft form for both schemes in order to simplify the process. The Pre-Existing Loft Declaration v2.0 can now be used for both schemes.

G. ECO4 Measures Table v2.0

1. In version 1.1, ESH and Electric Heating Systems were not considered as renewable heating systems even if they were installed along with Solar PV. However, version 2.0 has been revised to comply with the latest ECO4.1 legislative updates. Hence, ESH and Electric Heating Systems will now qualify as renewable heating systems when installed in a home which has Solar PV or is receiving Solar PV as part of the same project.
2. The following statement is removed to reflect the recent ECO4.1 legislative amendments: "Electric room heaters to electric storage heaters is not an eligible measure in ECO4".
3. The following statement is added to reflect the recent ECO4.1 legislative amendments: "ESH and electric heating systems can be installed in homes with neither an efficient nor inefficient heating system. This also includes if a home uses only plug in room heaters or wall mounted electric heaters. For off-gas homes this is the last option in the off-gas heating hierarchy"
4. PAS Annex column is added following industry feedback.
5. Footnote 8 is added for ESH measures carried out in PRS E-G tenure type.

H. ECO4 and the Great British Insulation Scheme -Templates to Evidence Private Domestic Premises and Social Housing v2.0

Following the recent feedback received from both Great British Insulation Scheme Consultation and Forms circulation with industry we combined this form for both schemes in order to simplify the process.

Furthermore, we updated the following statement to 12 months instead of 18 in accordance with our ECO4 Delivery Guidance.

"to be dated no earlier than 12 months prior to the date of completion of the first measure in the project".

I. ECO Reporting and Evidencing Forum Terms of Reference v1.0¹ (Former ECO4 Reporting Working Group)

At our event held on 15 February 2023, we made an important announcement regarding the updating of the ToR for this group.

We have been diligently working to enhance the group's structure, and one of our main focuses has been to encourage more participation and increase benefits from the structure of it to all members.

After careful consideration we have chosen to rename our group to the “**ECO Reporting and Evidencing Forum**” as this name better aligns with our overall vision for the future of our forum.

We believe that the changes outlined in the forum ToR will aid us and industry members in achieving goals and missions as a collective group.

¹ [ECO Reporting and Evidencing Forum : Terms of Reference | Ofgem](#)