

Energy Company Obligation (ECO4)

Summary of Updates

ECO4 Delivery Guidance & Measures Table

This document summarises the updates contained in each version of the above publications. Any references to paragraph numbers in this document apply to the version in question and may not be accurate references in other versions.

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1. ECO4 Delivery Guidance

Version 2.1

Publication date:	5 April 2024
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Version number:	2.1
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The new version contains general formatting and drafting improvements as well as specific updates described below.

DWP Data matching

Paragraph 3.134 to 3.145: Clarification of the two processes (EER/EST Data Matching) for cross checking a person's benefit status with DWP to confirm HTHG membership.

Child benefit income thresholds

Paragraph 3.146 to 3.165: Additional information and improved structure of the guidance on child benefit and evidencing income thresholds.

Customer contributions

Paragraph 4.24 to 4.27: Section added on the new requirement to collect the amount of customer contribution toward the installation of measures.

Loft Insulation

Paragraph 5.27: Addition that signed declarations 'should be present in all loft spaces, where a property has multiple'.

Paragraph 5.30: Additional guidance on when loft insulation is found to be present.

Insulation Preconditions

Paragraph 5.58 to 5.96: Additional information and clarity on demonstrating the insulation preconditions are met, including a new section on the 15 Year Simple Payback.

Evidencing a gas connection

Amendments to table 14 Evidencing a gas connection, including the removal of the need to evidence the property was connected on the start day of the ECO4 project (day of pre-retrofit assessment) as well as additional acceptable evidence.

Paragraph 5.106: New paragraph stating on-gas evidence not necessary for the installation of stand-alone heating controls.

Electric Storage Heaters & Electric Heating Systems

Paragraph 5.155 to 5.161: Additional information and clarity in the definition of these products and the circumstances that they can be installed under.

Signatures

Paragraph 8.36 to 8.48: Rules around signature application have been expanded and additional clarity has been provided on acceptable and unacceptable signature practices relating to copy and pasting.

New domestic premises

Throughout the document references to “new buildings” have been changed to “new domestic premises”.

Rural

Paragraphs 3.70 and 3.72: Clarification on the correct datasets to use to determine rural premises.

Measures Table

Paragraph 5.1 to 5.3: Updated text to signpost to revised full measures table.

Table 9: Measures table updated to improve accessibility and reflect updates to measures which are eligible under certain conditions. Row added to differentiate guidance on ESH – Upgrades to an HHR electric storage heater in homes with and without solar PV.

Matched WHD Core Group Notice

Paragraph 3.133: Additional wording to clarify WHD Core Group evidencing for HTHG eligibility.

Flex Audits

Removal of Table (previously Table 7): Non-exhaustive list of evidence examples for Routes 1-4.

Paragraph 3.209: Information on flex mismatches and remediation steps moved into Flex audit section from declarations section.

Innovation measures

Paragraph 5.108: Addition to paragraph that 'Innovation measures must meet the eligibility requirements for their underlying measure type'.

Paragraph 6.156: New paragraph emphasizing innovation measures must meet the eligibility requirements for their underlying measure type.

Hybrid heat pumps

Paragraph 5.151 and 5.152: Additional wording on the definition of hybrid heat pumps and their installation.

First time central heating

Paragraph 5.191: Additional wording on the definition of a central heating system and a wet central heating system.

Electric boilers

Removal of references to electric boilers throughout the document and as an acceptable post-main heat source from Table 22.

DHC installations and heating controls

Paragraph 5.225: Removal of requirement for properties following DHC installations to be left with a full set of functioning heating controls.

Paragraph 5.226: Addition that programmers and room thermostats installed alongside new DHCs are included in the DHC measure and suppliers must not notify a P&RT measure to Ofgem.

Condensing and non-condensing LPG Boiler as pre-main heat source

Paragraph 6.56: Additional information on when these can be used as a pre-main heat source.

Boilers

Paragraph 6.115: New paragraph on boiler measures and POPT.

Version 2.0

Publication date: 14 August 2023

Version number: 2.0

These updates reflect changes made by part 10 of The Electricity and Gas (Energy Company Obligation) Order 2023, which applies to measures installed from 14 August 2023. The new version contains general formatting and drafting improvements as well as specific updates described below.

Renewable heating systems

The definition of renewable heating system now allows for heating systems to be partly fuelled by a renewable source of energy or technology. This enables solar PV alongside electric heating and some hybrid heat pump systems (excluding coal, oil and LPG) to be installed as ECO4 measures.

Solar PV

Solar PV may be installed in both on-gas and off-gas homes that either already have a hydronic heat pump, electric storage heater (ESH), or an electric heating system (EHS). If the home has none of these measures, one must be installed as part of the ECO4 project. This still applies in scenarios where one of these measures is to be installed alongside solar PV. Installation of solar PV alongside such ESH or EHS will be allowed as a separate installation or as part of an ECO4 project.

ESH/ESH

An ESH or EHS measure may be installed to off-gas premises where:

- it replaces an existing EHS,
- one or more ESH is already installed, and
- the premises has neither an efficient nor inefficient heating system

Off-gas homes & DHS

As is already the case for on-gas homes, off-gas homes are able to connect to district heating systems fuelled wholly or partly by gas. An off-gas home that receives a connection to a gas fuelled DHS will still be considered an off gas home post installation.

Signatures

Version 2.0 also reflects that signatures are no longer required on local authority declaration forms, and introduces an example scenario of notifying projects with smart thermostat measures.

Version 1.1

Publication date:	3 February 2023
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Version number:	1.1
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The new version contains general formatting and drafting improvements as well as specific updates described below.

About this guidance

- Footnote 4: Added link to ECO4: Supplier Administration V1.0 Guidance,
- Footnote 5: Added link to ECO4: Local Authority Administration Guidance,
- Footnote 6: Added link to ECO4: New Measures and Products Guidance,
- Footnote 7: Added link to Ofgem ECO webpage: Contacts, guidance and resources,
- Footnote 8: Added link to Ofgem ECO webpage: Contacts, guidance and resources.
- Page 13: Updated links to guidance documents added to page.

Chapter 1: Introduction

- Paragraph 1.10. Formatting changes.

Chapter 2: Obligations

- Paragraph 2.5. Formatting changes.
- Paragraph 2.7. Formatting changes.
- Paragraph 2.14. Amended "draft ECO4 Guidance: Interim Delivery" to "ECO4 Guidance: Interim Delivery".
- Footnote 12: Added link to Ofgem ECO webpage: Contacts, guidance and resources.
- Footnote 13: Added link to Ofgem ECO webpage: Contacts, guidance and resources.
- Footnote 14: Updated cross reference.

Chapter 3: Eligibility

- Paragraph 3.36: Updated wording to say "Where a building is pre-existing before 1

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April 2022, a declaration in the ECO4 Pre-Installation Project Survey should be completed and signed to confirm that the building was pre-existing before 1 April 2022”.

- Paragraph 3.37: Amended “Pre-Project Declaration” to “declaration”.
- Paragraph 3.40: Amended “Pre-Project Declaration” to “declaration”.
- Paragraph 3.43: Amended “Pre-Project Declaration” to “ECO4 Post Installation Customer and Installer Declaration (under section A)”.
- Paragraph 3.44: Amended “Pre-Project Declaration” to “ECO4 Post Installation Customer and Installer Declaration Form”.
- Paragraph 3.67: Updated cross references.
- Footnote 32: Updated cross references.
- Paragraph 3.75: Updated cross references.
- Paragraph 3.84: Updated cross reference.
- Paragraph 3.99: Additional information added on which shared ground loops go through TrustMark and need an RdSAP assessment.
- Footnote 47: Added link to ECO4: Supplier Administration V1.0 Guidance.
- Paragraph 3.109: Updated cross reference.
- Paragraph 3.113: Amended “in each of the three ECO4 projects” to “each in a different ECO4 project” when discussing in-fill.
- Paragraph 3.115: Updated cross references.
- Paragraph 3.116: Amended “Figure 5: in-fill houses” to just “Figure 5”.
- Paragraph 3.133: Amended sentences on HTHG evidence eligibility to clarify that documents must be dated no more than 12 months before the day on which the measure is completed, and the evidence cannot be dated after the day of completed installation.
- Paragraph 3.134: Added sentence on HTHG evidence stating that suppliers should take particular care reviewing letters provided for benefits included in matching.
- Paragraph 3.140: Additional information added on suitable evidence for Child Benefit

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and when new evidence requirements come in from.

- Paragraph 3.141: Additional information added on how to confirm single or couple household and the number of children within the household.
- Paragraph 3.142: Amended sentences to clarify that evidence should be dated no more than 12 months before the day on which the measure is completed, and the evidence cannot be dated after the day of completed installation.
- Table 3: Formatting changes.
- Paragraph 3.146: Amended guidance title to ECO4 Guidance: Local Authority Administration.
- Table 4: Formatting changes.
- Table 4: Added and amended text for further clarity on ECO4 Flex Routes.
- Footnote 49: Added link to ECO4: Local Authority Administration Guidance.
- Table 5: Added that Route 2 Proxy 5 is for the purposes of NICE Guidelines.
- Paragraph 3.149: Amended text to “pre-project SAP bands E-G for both owner occupied and private rented households”.
- Paragraph 3.150: Amended text to clarify that suppliers should collect and retain declarations and have access to LA evidence.
- Paragraph 3.153: Amended text and added information on the standard referral letter for Citizen’s Advice, installer verification letter and the household application form.
- Footnote 51: Added link to the NHS referral letter template.
- Footnote 52: Added link to ECO4: Local Authority Administration Guidance.
- Footnote 53: Added link to the Citizen’s advice referral letter template.
- Footnote 54: Added link to the installer verification letter.
- Footnote 55: Added link to the household application form.
- Paragraph 3.154: Added that the SoI should only reflect ECO4 criterion.
- Paragraph 3.155: Added sentence “Only one SoI should be used when referring all households in the four years that ECO4 Flex is operating”.
- Paragraph 3.156: Amended sentence on which cohort of people the LA-run scheme is

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helping.

- Paragraph 3.157: Added paragraph on signature requirements.
- Paragraph 3.159: Amended text and added information on LA declarations.
- Footnote 56: Added link to ECO4 Flex Data Dictionary
- Paragraph 3.160: Amended and added text on declaration notifications to clarify that the declaration itself should be sent to the supplier, but that the declaration notification should be sent to Ofgem by the LA.
- Paragraph 3.161: Amended text on the declaration notification template and updated cross reference.
- Footnote 57: Added link to the declaration notification template.
- Footnote 58: Added link to ECO4: Local Authority Administration Guidance.
- Paragraph 3.162: Amended text on LA declaration processing.
- Paragraph 3.164: Amended text on the declaration notification template.
- Footnote 60: Added link to the declaration notification template.
- Paragraph 3.165: Amended text on the register for use by LAs.
- Paragraph 3.167: Amended "declaration" to "declaration notification".
- Table 6: Amended "notified" to "submitted" and "declaration" to "declaration notification".
- Paragraph 3.172: Added sentence clarifying that "There cannot be multiple declarations from the same LA with the same number; each household will need a unique number".
- Paragraph 3.178: Amended text to clarify that where the supplier works together with the LA, they must consult with the LA prior to any work commencing.
- Paragraph 3.180: Amended text to "the LA signs and sends the declaration to the supplier, and sends a LA declaration notification to Ofgem".
- Paragraph 3.186: Amended "to retain" to "have access to" and updated cross reference.
- Paragraph 3.189: Amended "collect" to "be able to provide".
- Table 7: Added and amended text on non-exhaustive evidence examples for Routes 1-

4. New evidence requirements for route 1 come in from 1 April 2023.

- Paragraph 3.195: Added “they”.

Chapter 4: Projects

- Paragraph 4.19: Added clarifying text on shared ground loops.
- Paragraph 4.22: Added clarifying text on shared ground loops.
- Paragraph 4.23: Amended text on non-ECO energy efficiency measures.
- Paragraph 4.26: Updated cross references.
- Paragraph 4.36: Added sentence “Exemptions from the off-gas hierarchy or insulation requirements are not subject to this cap, only exemptions from the MR”.
- Paragraph 4.44: Updated cross reference.
- Paragraph 4.47: Formatting change.
- Paragraph 4.63: Added text on Building Fabric Repair.
- Paragraph 4.72: Added and amended text on extraction.
- Paragraph 4.74: Removed text on skilled technician.
- Paragraph 4.75: Removed text on skilled technician.

Chapter 5: ECO Measures

- Paragraph 5.3: Added sentence on the light version of ECO4 Measures Table.
- Paragraph 5.5: Formatting change.
- Paragraph 5.10: Amended text so clarify that a measure may be rejected if there is evidence that it has been preceded by an extraction that does not comply with the guidance.
- Paragraph 5.11: Formatting change.
- Paragraph 5.14: Formatting change and amended text to “the same approach to partial project scores”.
- Table 12: Formatting change.
- Paragraph 5.17: Amended “score” to “partial project score”.
- Table 13: Formatting change.

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- Paragraph 5.20: Removed sentence "However, this information should remove the need for bespoke U value calculations in most cases".
- Paragraph 5.23: Removed sentence "In these situations, suppliers may calculate the U value of the wall. Suppliers must contact us if they intend to notify a measure with a calculated post installation U value".
- Paragraph 5.24: Amended text on EPR conventions and U values.
- Footnote 79: Added link to TrustMark webpage: Quality Assurance Monitoring Government Funded Schemes.
- Footnote 80: Removed text on U value calculation.
- Paragraph 5.26: Amended text on loft insulation.
- Paragraph 5.30: Formatting change.
- Paragraph 5.37: Formatting change.
- Paragraph 5.38: Formatting change.
- Footnote 82: Amended "conventions" to "Conventions".
- Paragraph 5.44: Formatting change.
- Paragraph 5.46: Formatting change.
- Paragraph 5.49: Formatting change.
- Paragraph 5.58: Added "in paragraph" and updated cross references.
- Paragraph 5.60: Amended text on prescribed standards for insulation measures.
- Footnote 89: Added link to Building regulations.
- Paragraph 5.64: Amended text on prescribed standards.
- Paragraph 5.66: Amended text on prescribed standards.
- Footnote 91: Added link to ECO4 project forms and tables.
- Paragraph 5.76: Updated cross reference.
- Paragraph 5.90: Updated cross reference.
- Paragraph 5.106: Added sentence "in respect of level 3 measures, the home does not have a relevant pre main heat source".
- Paragraph 5.107: Amended "PAS IOE" to "PAS Improvement Options Evaluation

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report”, and “pre-insulation” to “pre-installation”.

- Paragraph 5.109: Updated cross reference.
- Paragraph 5.117: Updated cross reference.
- Paragraph 5.123: Updated cross reference.
- Paragraph 5.128: Updated cross reference.
- Paragraph 5.130: Formatting change.
- Paragraph 5.134: Amended “an efficient heating system or renewable heating system” to “a heating system”.
- Paragraph 5.136: Added paragraph “A hybrid heat pump refers to a system that uses a heat pump alongside another heat source. Integrated gas hybrid air source heat pumps may be delivered through ECO in on-gas premises. A gas hybrid heat pump is not considered to be a renewable heating measure”.
- Paragraph 5.143: Amended text on ESH and electric heating systems.
- Paragraph 5.144: Amended text on ESH and electric heating systems.
- Paragraph 5.145: Removed text listing non-renewable electric heating systems and added “For a heat source to be considered as an electric heating system, it must meet the definition of central heating (ie a system which provides heat for the purpose of space heating through a boiler)”.
- Paragraph 5.146: Added text on solar PV.
- Paragraph 5.150: Amended text on ‘preHCs’.
- Paragraph 5.151: Amended “property” to “pre-installation RdSAP assessment”.
- Paragraph 5.160: Updated cross references.
- Paragraph 5.164: Amended “TTZC scores” to “TTZC partial project scores” which assume the property already has a full set of functioning heating controls as a baseline.
- Paragraph 5.165: Amended text on TTZC measures.
- Table 17: Amended text on heating control score examples.
- Paragraph 5.177: Updated cross reference.
- Paragraph 5.181: Updated cross reference.

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- Paragraph 5.183: Added "Gas hybrid air source heat pump".
- Paragraph 5.185: Updated cross reference.
- Paragraph 5.186: Updated cross reference.
- Paragraph 5.187: Updated cross reference.
- Paragraph 5.195: Updated text on solar PV.
- Paragraph 5.198: updated cross references.
- Paragraph 5.199: Removed text "when it is installed as part of an ECO4 project" and updated cross reference.
- Paragraph 5.200: Amended text on solar PV.
- Paragraph 5.201: Amended text on ESH / electric heating systems that are installed alongside solar PV.
- Paragraph 5.209: Updated cross reference.
- Paragraph 5.212: Amended text on shared ground loops GSHPs.
- Paragraph 5.215: Amended text on shared ground loops GSHPs.
- Paragraph 5.231: Amended text on DHC measures.
- Paragraph 5.236: Amended text on shared ground loops GSHPs.
- Paragraph 5.242: Updated cross reference.

Chapter 6: Scores

- Paragraph 6.25: Added text "(and no exemption applies)" where a project is completed but does not meet the minimum requirement.
- Paragraph 6.37: Added paragraph on EPR.
- Paragraph 6.49: Added text "and TrustMark EPR Conventions".
- Footnote 141: Amended text on RdSAP Conventions link.
- Footnote 142: Added link to TrustMark webpage: Quality Assurance Monitoring Government Funded Schemes.
- Paragraph 6.52: Amended "RdSAP conventions" to "RdSAP Conventions".
- Table 22: Added "Gas hybrid ASHP".

- Paragraph 6.66: Updated cross reference.
- Table 23: Updated cross references.
- Paragraph 6.101: Updated cross reference.
- Table 24: Updated cross reference.
- Table 25: Updated cross reference.
- Table 27: Formatting changes.
- Paragraph 6.139: Updated cross references.

Chapter 7: Notifications

- Paragraph 7.7. Heading amended to “Timing of measure and project notifications”.

Chapter 8: Monitoring, audit and fraud prevention

- Paragraph 8.5: Amended text on shared ground loops GSHPs.

Appendices

- Index: Page numbers updated.
- Table 28: Amended text on templates for ECO4.
- Paragraph 13.1: Formatting change.
- Table 31: Formatting change.
- Table 32: Added text “(cost savings value + innovation uplift)”.
- Appendix 6: Flow-chart amended

Version 1.0

Publication date: 14 October 2022

Version number: 1.0

The new version contains formatting and wording updates to sub-headings, as well as reference to definition of householder documents showing Help to Heat Group (HTHG) eligibility updated to “no more than 12 months prior to the beginning of a project” under ECO4.

About this guidance

- Footnote 3: Added link to ECO4 Order,
- Footnote 4: Added link to Ofgem ECO webpage,
- Footnote 5: Added link to ECO4 Flex: Local Authority Administrative Guidance,
- Footnote 6: Added link to ECO4: New Measures and Products Guidance,
- Footnote 7: Added link to ECO4: Draft Interim Delivery Guidance,
- Footnote 8: Added link to Ofgem ECO webpage: Monitoring.
- Page 13: Final links to other guidance documents added to page.

Chapter 1: Introduction

- Paragraph 1.10. Formatting changes.

Chapter 2: Obligations

- Paragraph 2.5: Added “excluding mobile homes” to the types of premises that are eligible to count towards the Solid Wall Minimum Requirement (SWMR).
- Paragraph 2.14: Added paragraph on Interim Delivery in between ECO3 and ECO4 measures.
- Footnote 12: Added footnote to the draft ECO4 Interim Delivery Guidance.
- Footnote 13: Added footnote to Ofgem’s ECO Contacts, Guidance and Resources page.
- Paragraph 2.16: Added bullet point defining “MIR” as an acronym for “Minimum

Insulation Requirement”.

- Table 1: Changed cross-reference in HTHG, Measures box.
- Table 1: Updated HTHG Insulation Requirements box to say: “these requirements are met if all insulation is already installed in the home to the required standard”.
- Table 1: Removed last sentence from HTHG, Insulation Requirements box.
- Table 1: Updated Social Housing (SH), Insulation Requirements box to say: “These requirements are met if all insulation is already installed in the home to the required standard”.
- Table 1: Updated SH Measures box to refer to District Heating Connection by its acronym, “DHC”.
- Table 1: Changed cross-reference in ECO4 Flex: Route 1, Measures box.
- Table 1: Removed last sentence from ECO4 Flex: Route 1 Insulation Requirements box.
- Table 1: Changed cross-reference in ECO4 Flex: Route 2, Measures box.
- Table 1: Changed cross-reference in ECO4 Flex: Route 3, Measures box.
- Table 1: Changed cross-reference in ECO4 Flex: Route 4, Measures box.
- Table 1: Added information concerning Band D and Bands E-G properties receiving measures in the Primary ECO flat for in-fill, Insulation Requirements box.
- Table 1: Changed sentence to say “this requirement is met if all insulation is already installed in the home to the required standard” in Primary ECO house for in-fill, Insulation Requirements box.
- Table 1: Changed last sentence in the Off-Gas, Insulation Requirements box to say “these requirements are met if all insulation is already installed in the home to the required standard”.

Chapter 3: Eligibility

- Paragraph 3.3: Added information on the private and domestic and premises requirements.
- Paragraph 3.6: Added “the ECO4 data dictionary” and added footnotes to the ECO

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Order, ECO4 Data Dictionary, and Appendix 2 in the ECO4 Guidance: Delivery.

- Paragraph 3.13: Removed sentence.
- Figure 1: Updated asterisk information on proof of residence dated before or within 12 months prior to completion of the first measure in a project.
- Figure 3: Updated asterisk information on proof of residence dated before or within 12 months prior to completion of the first measure in a project.
- Paragraph 3.26: Added reference to mobile homes as also park homes.
- Paragraph 3.27: Added "RdSAP (Reduced Data SAP)" to sentence.
- Paragraph 3.30: Additional information added on the definition of 'dwelling' in England and Wales and Scotland Regulations.
- Paragraph 3.36: Updated wording to say "the ECO4 Pre-Installation Project Survey should be completed and signed to confirm that the building was pre-existing before 1 April 2022".
- Paragraph 3.37: Added reference to the Pre-Project Declaration.
- Paragraph 3.59: Added paragraph on care homes and student halls' non-eligibility for ECO4.
- Paragraph 3.67: Cross references updated.
- Paragraph 3.70: Rural Urban Indicator Codes updated for Wales.
- Paragraph 3.71: Rural Urban Classification updated for Scotland.
- Paragraph 3.73: Added reference in paragraph about full project scores (FPS).
- Paragraph 3.75: Update to cross-references.
- Paragraph 3.76: Amended sentence.
- Paragraph 3.77: Amended sentences and additional information on a renewable heating system.
- Paragraph 3.79: Amended sentence and added reference to the ECO4 Eligibility Requirements Form.
- Paragraph 3.80: Removed sentence.
- Paragraph 3.81: Amended sentence.

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- Paragraph 3.82: Acronyms added.
- Paragraph 3.84: Update to cross-references.
- Paragraph 3.93: Update to cross-references.
- Paragraph 3.97: Added sentence on the definition of a house, according to the ECO4 Order.
- Paragraph 3.99: Amended sentence.
- Paragraph 3.101: Added sentence on the type of measure installed into an in-fill property.
- Paragraph 3.104: Amended sentence.
- Paragraph 3.111: Additional wording added on social housing for innovation measures.
- Paragraph 3.115: Amended sentence.
- Paragraph 3.117: Update to cross-references.
- Paragraph 3.118: Update to HTHG evidence eligibility.
- Paragraph 3.122- 3.123: Added information on data-matching HTHG evidence.
- Table 2: Additional information added to 'Child Benefit'.
- Paragraph 3.129: Amended sentence.
- Paragraph 3.133: Amended sentence on HTHG evidence eligibility.
- Paragraph 3.135: Added sentence on when suppliers notify unmatched or unverified measures on the ECO register.
- Paragraph 3.138: Amended sentence.
- Paragraph 3.141: Added sentence on the restriction of customer self-declarations for Child Benefit, without further evidence supporting their household income threshold.
- Paragraph 3.143: Amended sentence.
- Table 4: Added information on the ECO4 Flex routes.
- Table 5: Divided and renamed proxy 7 into '7(a)' and '7(b)'.
- Paragraph 3.150: Added information on evidence retention for ECO4 Flex.
- Paragraph 3.152: Amended sentence.
- Paragraph 3.153: Added sentence on Ofgem's standard referral letters for doctors and

GPs.

- Paragraph 3.156: Added information on the mandatory Statement of Intent (SoI)

fields.

- Paragraph 3.157: Added sentence on the responsibilities of delegating local authorities.
- Paragraph 3.159: Amended sentence.
- Paragraph 3.160: Added sentence on declaration timings.
- Paragraph 3.161: Added sentence to Ofgem's response time from receiving declarations.
- Paragraph 3.165: Amended sentence.
- Paragraph 3.167- 3.168: Updates to URN format.
- Paragraph 3.171: Update to Appendix number.
- Paragraph 3.174: Update to Non-Pre-Payment meter and Pre-Payment meter definitions.
- Paragraph 3.183: Update to cross-reference.
- Table 7: Update to the non-exhaustive list of evidence types under ECO4 Flex.
- Paragraph 3.189: Added "and measures may be rejected" to sentence.
- Paragraph 3.192: Amended sentence.

Chapter 4: Projects

- Paragraph 4.2: Updating wording on an ECO4 Packages.
- Paragraph 4.14: Updated wording to specify "ECO4 Projects".
- Paragraph 4.22: Amended sentence to outline the actions that a supplier should take when they have a project consisting only of DHC measures, DLMS or IMs that are not installed in accordance with PAS 2030:2019 or MCS standards, and where PAS 2035 is not relevant.
- Paragraph 4.25: Amended sentence on deflated Partial Project Scores, (PPS).
- Paragraph 4.27: Updated bullet points on the circumstances that may prevent the installation of a measure under ECO4.

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- Paragraph 4.28: Updated sentence on exceptions.
- Paragraph 4.29: New paragraph added on exemption requirements.
- Paragraph 4.30: New paragraph added on exemption requirements.
- Paragraph 4.33: New paragraph added on when details contained within the measure name are not available for exempt measures.
- Paragraph 4.36: Updated paragraph on when a supplier requests an exemption from the MR through the completed project notification.
- Paragraph 4.40: Updated paragraph on non-compliant measures.
- Paragraph 4.41: Updated paragraph and bullet points on where a measure has been found non-compliant through TrustMark's Quality Assurance framework.
- Paragraph 4.42: New paragraph added on DHC measures that fall outside of TrustMark's Quality Assurance framework.
- Paragraph 4.43: New paragraph added on when a rejection occurs within a project where an exemption applies.
- Paragraph 4.44: Updated paragraph.
- Figure 8: Updated flowchart covering the scenarios for projects with non-compliant measures.
- Paragraph 4.48: Updated paragraph wording on the date of completed installation, (DOCI).
- Paragraph 4.59: Update to cross-reference.
- Paragraph 4.65: Added sentence on new insulation installation.
- Paragraph 4.67: Added sentence on appropriate insulation guarantee.
- Paragraph 4.69: Updated paragraph on the relevant health and safety procedures for extraction.
- Paragraph 4.71: Updated paragraph and bullet points on extraction checks and procedures.
- Paragraph 4.72: Added paragraph on the definition of "defective".
- Paragraph 4.74: Added paragraph on when and how a skilled technician, that could

include a Chartered Surveyor, visit and inspect a property for the purposes of completing the extraction survey.

- Paragraph 4.75: Updated paragraph on extraction of insulation, including standards, requirements, and property inspections.
- Paragraph 4.76: Added sentence on non-ECO measures affecting a property's SAP rating and restrictions on installation.
- Paragraph 4.84: Updated paragraph on blended funding with the Boiler Upgrade Scheme (BUS).

Chapter 5: ECO Measures

- Table 10: Update to formatting and content of the measures table
- Paragraph 5.3: Paragraph moved to minimum insulation pre-conditions
- Paragraph 5.6: Added sentence (from paragraph 5.11) on CWI installed to partially filled cavity.
- Paragraph 5.8: Reworded sentence on test certificates.
- Paragraph 5.9: Reworded sentence on CWI installation. Sentence added on when measures may be rejected if preceded by a non-compliant extraction.
- Paragraph 5.11: Paragraph moved to paragraph 5.6.
- Paragraph 5.15: Inserted wording on partial project score variants.
- Paragraph 5.23: Amended sentence so that the correct table (Table 14) is cross-reference. 'Deemed Scores' matrix amended to 'Partial Project' matrix.
- Paragraph 5.24: Rules regarding loft insulation measures reworded into bullet points.
- Paragraph 5.25: Reworded sentence regarding pre-existing loft declaration.
- Paragraph 5.28: Sentence on pre-existing loft insulation exceptional circumstances removed.
- Paragraph 5.29: Sentence added on definition of room-in-roof.
- Paragraph 5.35: Deleted sentence on insulation of pipework with RIRI.
- Paragraph 5.36: Amended footnote.

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- Paragraph 5.43: 'Roof' replaced with 'ceiling'. Removed sentence regarding PAS standards for park home insulation measures.
- Paragraph 5.44: Reworded sentence on PHI measure technical guide.
- Paragraphs 5.48 – 5.51: Inserted section entitled Solid Wall Insulation including definition, rules and guidance on SWI measures.
- Paragraph 5.56: Amended wording and formatting on minimum insulation preconditions.
- Paragraph 5.57: Amended sentence.
- Paragraph 5.59: Amended wording regarding prescribed standards.
- Figure 11: Wording updated to reflect chapter 4 rather than paragraph 4.23.
- Paragraph 5.61: Sentence added regarding pre-conditions.
- Paragraph 5.62: Sentences added regarding operatives overseeing a project and Pre-Installation Heating Checklist.
- Paragraph 5.63: Paragraph added on demonstrating meeting the pre-conditions.
- Paragraph 5.64: Paragraph regarding wall insulation reworded.
- Paragraph 5.65: Paragraph and bullet list amended.
- Paragraph 5.67: Paragraph and bullet list amended.
- Paragraphs 5.68 – 5.69: New section added on party cavity wall insulation pre-conditions.
- Paragraph 5.74: Paragraph regarding meeting the roof insulation pre-condition separated into bullet points.
- Paragraph 5.75: New section added on park home insulation pre-conditions.
- Paragraphs 5.78 – 5.79: New section added on pre-condition 2 for loft, roof and room in-roof insulation.
- Paragraph 5.84: Sentence added on on-gas connection.
- Paragraph 5.85: Paragraph added on satisfying the criteria for a gas connection.
- Table 15: Table added on evidencing a gas connection.
- Paragraph 5.86: Paragraph added on demonstrating a gas connection.

Summary of Updates | ECO4 Delivery Guidance & Measures Table

- Paragraph 5.87: Sentence added regarding off-gas properties.
- Paragraph 5.88: Paragraph added regarding gas connection evidencing.
- Paragraph 5.89: Paragraph added regarding pre-installation heating checklist.
- Paragraph 5.90: Reworded sentence.
- Figure 12: On-gas measures flowchart content amended.
- Paragraph 5.91: Sentence deleted regarding solar PV and ESH.
- Paragraph 5.93: Paragraph updated to include pre-installation heating checklist, and bullet list removed.
- Paragraph 5.94: Paragraph reworded.
- Paragraph 5.95: Paragraph reworded.
- Paragraph 5.96: Paragraph reworded regarding measures installed to off-gas homes.
- Figure 13: Off-gas measures requirement moved.
- Table 16: Table on off-gas measure restrictions moved and amended.
- Figure 14: Off-gas hierarchy moved, and format amended.
- Paragraph 5.99: Paragraph added on hydronic heat pumps.
- Paragraph 5.100: Paragraph added on broken heating systems.
- Paragraph 5.101: Paragraph added on DHC measures and pre-installation heating checklist.
- Paragraph 5.102: Sentence added on biomass systems.
- Paragraph 5.103: Amended paragraph and bullets referring to measures that are not possible to install.
- Paragraph 5.104: Sentence amended.
- Paragraph 5.105: Paragraph added regarding pre-installation heating checklist.
- Paragraph 5.106: Paragraphs regarding repairs merged and amended.
- Paragraph 5.109: Sentence amended.
- Paragraph 5.110: Paragraph amended.
- Paragraph 5.111: Sentence amended.
- Paragraph 5.113: Cross-reference amended.

Summary of Updates | ECO4 Delivery Guidance & Measures Table

- Paragraph 5.115: Paragraph amended.
- Paragraph 5.116: Sentence amended.
- Paragraph 5.117: Section renamed (Replacement of efficient heating systems) and paragraph amended.
- Paragraph 5.118: Paragraph amended.
- Paragraph 5.119: Paragraphs merged and amended.
- Paragraph 5.120: Paragraph amended.
- Paragraph 5.121: Paragraph added regarding renewable heating systems.
- Paragraph 5.122: Paragraph added regarding IMs and heating controls.
- Paragraph 5.123: Sentence amended.
- Paragraph 5.125: Cross-references updated.
- Paragraph 5.129: Sub-heading amended (Hydronic heat pumps)
- Paragraph 5.131: Paragraph amended.
- Paragraph 5.132: Paragraph added regarding installation of a heat pump as an upgrade measure.
- Paragraph 5.133: Sentence amended.
- Paragraph 5.134: Sentence amended.
- Paragraph 5.136: Sentence added regarding HHR ESH.
- Paragraph 5.137: Sentence amended.
- Paragraph 5.139: Paragraph added regarding eligibility of efficient ESH and electric heating.
- Paragraph 5.142: Paragraph added regarding list of non-renewable electric heating systems.
- Paragraph 5.129: Sentence amended (smart thermostats added).
- Paragraph 5.130: Heading amended (TRVs and Programmer & room thermostats).
- Paragraph 5.145: Sentence amended (smart thermostats added).
- Paragraph 5.146: Paragraph added regarding boiler upgrade measures.
- Paragraph 5.147: Paragraph amended.

Summary of Updates | ECO4 Delivery Guidance & Measures Table

- Paragraph 5.148 – 5.156: Section added containing detailed guidance regarding smart thermostats.
- Paragraph 5.162: Paragraphs merged and amended to include reference to smart thermostats.
- Paragraph 5.163: Paragraph added regarding compensation score.
- Table 17: Table added containing heating control score examples.
- Paragraph 5.166: Paragraph amended.
- Paragraph 5.186: Declaration amended.
- Paragraph 5.172: Sentence amended.
- Paragraph 5.173: Sentence added regarding upgrade eligibility of broken inefficient central heating systems.
- Paragraph 5.174: Sentence added.
- Paragraph 5.175: Paragraph amended.
- Paragraph 5.176: Paragraph amended to include range cooker boilers.
- Paragraph 5.177: Cross-reference updated.
- Paragraph 5.178: Sentence amended to include range cooker boilers (rather than Agas).
- Paragraph 5.181: Sentence amended to refer to DHC measures.
- Paragraphs 5.181 – 5. 183: Cross-references updated.
- Paragraph 5.186: Paragraph amended to reflect biomass rules.
- Paragraph 5.187: Paragraph amended to reflect biomass rules.
- Paragraphs 5.191 – 5.192: Paragraphs amended to specify eligible heating measures.
- Paragraphs 5.195 – 5.197: Paragraphs added regarding solar PV.
- Paragraph 5.199: Sentence amended.
- Paragraph 5.200: Paragraph amended, and cross-reference updated.
- Paragraph 5.201: Paragraph amended.
- Paragraph 5.203: Paragraph amended to exclude shared ground loop GSHPs.
- Paragraph 5.204: Paragraph added regarding shared ground loop GSHPs.

- Paragraph 5.205: Cross-reference updated.
- Paragraph 5.206: Paragraph amended to reference pre-installation heating checklist in more detail.
- Paragraph 5.207: Sentence amended.
- Paragraph 5.208: Paragraph added regarding shared ground loop DHC measures.
- Paragraph 5.218: Sentence amended.
- Paragraph 5.222: Paragraph amended.
- Paragraph 5.223: Paragraph amended.
- Paragraph 5.232: Sentence amended (regarding shared ground loop DHC measures).

Chapter 6: Scores

- Paragraph 6.5: Sentence added regarding penalties.
- Paragraph 6.13: Paragraph amended.
- Paragraph 6.14: Paragraph added regarding floor area used to calculate SAP/RdSAP.
- Paragraph 6.15: Paragraph amended, and cross-references updated.
- Paragraph 6.17: Sentence deleted regarding use of RdSAP/Sap 2012.
- Paragraph 6.18: Sentence added regarding use of RdSAP 2012 v9.94.
- Paragraph 6.19: Sentence added regarding use of SAP 2012 v9.92. SAP 10.
- Paragraph 6.27: Sentence added regarding Partial Scores Matrix.
- Paragraph 6.28: Updated cross-reference.
- Paragraph 6.36: Updated cross-reference.
- Paragraph 6.38: Paragraph amended.
- Paragraph 6.39: Paragraph amended.
- Paragraph 6.40: Paragraph added on notification of DLM and SAM measures.
- Paragraph 6.41: Paragraph added on deemed SAP improvement for SAMs and DLMs.
- Paragraph 6.42: Sentence amended.
- Paragraph 6.43: Sentence amended.
- Paragraph 6.44: Sentence added on POPT late penalties.

Summary of Updates | ECO4 Delivery Guidance & Measures Table

- Paragraphs 6.46 – 6.47: Paragraphs added on example late penalty added calculations.
- Paragraph 6.51: Paragraph added on ESH and FTCH eligibility.
- Table 18: Table amended.
- Table 19: Table amended.
- Paragraph 6.61: Sentence amended.
- Paragraph 6.74: Updated cross-references.
- Paragraph 6.76: Updated cross-references.
- Paragraph 6.81: Sentence amended.
- Paragraph 6.85: Paragraph amended.
- Paragraph 6.109: Sentence amended to specify partial project score.
- Paragraph 6.112: Paragraph amended.
- Paragraph 6.114: Sentence amended.
- Paragraph 6.131: Paragraphs amended.
- Paragraph 6.137: Sentence amended regarding BFR uplift.
- Paragraph 6.139: Updated cross-references.
- Paragraph 6.147: Paragraph amended to specify broken boiler replacement.
- Paragraph 6.149: Paragraph added on standard alternative methodology.
- Paragraph 6.150: Paragraph added on data light measures.
- Paragraph 6.151: Paragraph added on innovation measures.

Chapter 7: Notifications

- Paragraph 7.7: Heading and paragraph amended.
- Paragraph 7.8: Paragraph amended.
- Paragraph 7.11: Paragraph amended regarding project notifications.
- Paragraph 7.15: Paragraph amended regarding notification of late measures.
- Paragraph 7.16: Paragraph added regarding example notification of late measures.
- Paragraph 7.20: Heading amended to 'Late projects'.
- Paragraph 7.25: Sentence added on measures installed beyond extended deadline.

Chapter 8: Monitoring, audit and fraud prevention

- Paragraph 8.27: Sentences added on evidence tampering.
- Paragraph 8.36: Sentences added on signature duplication.
- Paragraph 8.37: Sentence amended regarding document signatories.
- Paragraph 8.46: Sentence amended regarding signature forgery.
- Paragraph 8.49: Sentence added regarding copying and pasting.
- Paragraph 8.51: Sentence amended regarding copying and pasting.
- Paragraph 8.54: Sentence amended regarding photocopying.

Appendices 9-15

- Table 26: Table amended regarding ECO4 templates.
- Paragraph 10.6: Paragraph amended.
- Paragraph 10.42: Paragraph amended.
- Paragraph 10.50: Paragraph amended.
- Paragraph 10.61: Paragraph amended.
- Example 3: Image updated.
- Paragraph 11.18: Paragraph amended.
- Paragraph 11.21: Paragraph amended.
- Paragraph 11.27: Paragraph amended.
- Paragraph 11.30: Updated cross-reference.
- Paragraph 11.31: Paragraph amended.
- Paragraph 11.31: Paragraph amended regarding rejected measures.
- Paragraph 11.38: Paragraph amended regarding warranty requirement.
- Paragraph 12.3: Paragraph amended regarding replacement ESHs.
- Paragraph 12.4: Paragraph amended regarding eligible ESH measures.
- Paragraph 12.7: Sentence added regarding broken efficient and not economically repairable ESH.
- Paragraph 12.9: Sentence added regarding high heat retention ESH.

Summary of Updates | ECO4 Delivery Guidance & Measures Table

- Paragraph 12.15: Updated cross-reference.
- Paragraph 12.19: Updated cross-reference.
- Paragraph 12.29: Paragraph amended regarding repair or replacement of ESH.
- Appendix 7: Rows amended referring to EHS, PICI and SAP rating

2. ECO4 Measures Table

Version 3.0

Publication date: 5 April 2024

Version number: 3.0

The new version contains the following changes:

- Added a row (11) to the table to accurately express electric storage heaters (ESH) with and without solar PV scenarios.
- Footnote 8 has been removed and new footnote 3 of the “Key” added to express that ESH without solar PV can be installed in private rented sector (PRS), provided listed measures are part of the same project and it doesn’t replace an ESH, an electric heating system (EHS) or a boiler.
- Added footnote 3 for upgrading to non-renewable heating system in PRS.
- Boiler upgrade to renewable heating system and non-renewable heating system in social housing with SAP bands E to G corrected and expressed in footnote 6.
- Introduction content moved to another tab and content significantly streamlined.
- Footnotes have been reworded to be clearer more consistent.
- Changed the two “Owner-Occupied” columns to just one column for SAP Band D to G.
- Social Housing columns swapped so that the increase in SAP band is from left to right.
- “ECO4 Measure Name” corrected to “Measure Type” to be consistent with [PPS Matrix](#). “Measure Type” corrected to “Measure Description”.
- Removed “boiler-” and “ESH-” prefixes in the now “Measure Description” column as not necessary for description.
- Other general formatting and drafting improvements

Version 2.0

Publication date: 9 August 2023

Version number: 2.0

Under the first ECO4 legislative amendments on 14 August 2023, electric storage heaters and Electric Heating Systems are classed as renewable heating systems when installed in a home which has solar PV or receives solar PV as part of the same project. We updated the measures table to reflect this.

Version 1.1

Publication date: 10 November 2022

Version number: 1.1

Some corrections and updates were made. We:

- updated footnotes 3 and 6 to correct misinterpretations
- added footnote 7 to clarify boiler installations in social housing SAP band E-G
- updated the eligible heating measures which can be carried out to social housing SAP band D
- updated the footnote in PWI cavity in private rented sector SAP bands E to G
- split external / internal wall insulation into solid and cavity wall types
- Updated the labels in the boiler measure type section for greater clarity
- clarified the footnote relating to solar PV
- removed the requirements table

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