

## Energy Company Obligation (ECO3) Summary of updates in the ECO3 Guidance: Delivery v1.5

### Introduction

This document outlines the amendments we have made to our ECO3 Guidance: Delivery v1.4 (draft for comment) that was initially published on 11 February 2020. All amendments are included in Version 1.5 of the document.

### Overview of amendments to ECO3 Guidance: Delivery

#### Throughout document

- Added reference to the UFI guidance as published by BEIS
- Updated warranty requirements for certain boiler and ESH repair or replacement measures from 'at least one' to 'at least two' years.

#### About this guidance

- Revised date to show that measures installed from 1 October 2020 should follow guidance v1.5

#### Chapter 1

- Paragraph 1.19: Capitalised the 'M' in 'TrustMark'

#### Chapter 2

- Paragraph 2.33: Added 'a short-stay apartment or hostel, where occupants usually stay for periods of less than 3 months' to point b).
- Paragraph 2.34: Removed 'short-stay hostel, where occupants usually stay for periods of less than 3 months.'
- Paragraph 2.51: Reworded the paragraph to improve clarity
- Paragraph 2.63: Added TV licence as evidence of occupancy for consistency with paragraph 10.50
- Paragraph 2.72: Reworded first sentence to explain that 'measures must be installed by, or under the responsibility of, a person who is registered with TrustMark (or equivalent)'

- Paragraph 2.76: Reworded to explain the persons of appropriate skill and experience necessary to install measures than are not referred to in PAS
- Paragraph 2.77: Amended paragraph to explain the suitable qualifications for installers of DHS measures
- Footnote 22 of v1.4 removed
- Paragraph 2.83: Added paragraph to explain PAS transition period in response to Covid-19
- Paragraph 2.85: Reworded paragraph and added "installed in accordance with"
- Paragraph 2.89: Reworded paragraph to explain the installation standards for ECO measures and capitalised the 'M' in 'TrustMark'.
- Paragraph 2.90 (b): Added caveat about demonstrating compliance with building regulations, highlighting that the approach may alter subject to the finalised outcome of the EU (Withdrawal Agreement) bill
- Paragraph 2.96-2.97: Reworded the paragraphs to improve clarity about installation standards for ECO measures and gaining permission to access certain areas

### Chapter 3

- Paragraph 3.11: Reworded paragraph to improve clarity
- Paragraph 3.13: Added paragraph to clarify the tenure of a property under liferent
- Paragraph 3.44: Rephrased for improving clarity on HTHG eligibility, acceptable benefits and benefit date.
- Paragraph 3.45: Added 'or no more than 31 days after the completion of the measure'
- Paragraph 3.98: Removed "appropriate local authority has provided any LA declaration used"
- Paragraph 3.128: Reworded example to explain how multiple measures can be installed in a single premises
- Paragraph 3.129: Added '(C where this is a demonstration action or innovation measure)'
- Paragraph 3.131: Added '(C for innovation)'
- Paragraph 3.133: Added 'after the measure is installed'
- Paragraph 3.134: Added '(D, E, F or G for innovation)'

### Chapter 4

- Paragraph 4.6: Reworded to improve clarity
- Paragraph 4:12: Added phrase 'as it will not automatically be considered a solid wall', for clarity

- Paragraph 4.13: Removed 'In addition, in cases where a wall of system built construction is treated with IWI or EWI as this is the most appropriate method of insulation, savings for that measure will also count towards a supplier's SWMR'
- Paragraph 4:18: Included cross-reference to paragraph 4.44-4.46 to support guidance
- Footnote 93: added footnote to explain the qualifications required for a Chartered Surveyor
- Paragraph 4.31: Added paragraph to explain the installation standards for suspended underfloor insulation
- Footnote 102: Added footnote for the *Guide to Best Practice: Retrofit Floor insulation – Suspended Timber Floors*
- Paragraph 4.32-4.47: Rearranged, moved from 4.17-4.24 and expanded guidance on removing and replacing insulation measures for ECO purposes. The information now applies to all insulation measures and guides when and how we will accept the removal and replacement of insulation measures
- Paragraph 4.55: Added paragraph to describe how a broken heating system that does not meet the definition of a boiler can be notified under ECO
- Paragraph 4.90-4.114: Replaced 4.86-4.107 with new guidance for First Time Central (FTCH) Heating measures
- Table 15: Added table to describe the non-technical reasons for not installing the FTCH pre-conditions
- Footnote 119: Added footnote to explain where to find information about chartered surveyors
- Footnote 120: Added footnote to explain where to find information about chartered ecologists
- Paragraph 4.123: Added clarification to define the qualifications required to install a microgeneration measure
- Paragraph 4.133: Added 'Heating controls must be notified separately using the proxy for DHS as the pre-main heat source'
- Footnote 134 of version 1.4 removed
- Paragraph 4.185-4.186: Added paragraphs to describe note interaction with Green Homes Grant scheme

## Chapter 5

- Paragraph 5.35: Added clarification 'Applications should propose a general description of the measure type, for example by reference to function, product standards or

performance. A score or scoring methodology cannot be reserved for a specific named product'

- Paragraph 5.8: Reference added to clarify how demonstration actions are scored and that bespoke formula is 'detailed in section 4 of the ECO3 Guidance: Innovation'.

## Chapter 6

- Paragraph 6.12 b): Added clarification to confirm that a room-in-roof is not considered a separate storey
- Paragraph 6.12 f): Reworded to improve clarity
- Paragraph 6.26: Reworded to improve clarify that the guidance refers to all pre-main heating sources
- Paragraph 6.28: Amended reference to '4.109 to 4.126' to refer to the paragraphs on identifying the main heating system
- Paragraph 6.61: Removed "and alternative wall areas such as tile hung areas"
- Paragraph 6.62: Added new paragraph to explain circumstances where insulation should be installed
- Paragraph 6.67-6.68: Added 'non-separate' before conservatory / conservatories to insist that the wall between a separate conservatory and the rest of the house is a heat loss wall and therefore cannot require the outer wall of a separate conservatory to be insulated
- Paragraph 6.86: Added clarification to explain that we would not consider fixed room heaters to be the main heating system when they are present at the same premises as another main space heating system
- Paragraph 6.102-6.103: Amended and expanded to clarify the position on using a U value calculations to determine the appropriate score.
- Footnote 160: Added footnote to explain a suitable qualification that can be used to qualify a person carrying out U-value calculations
- Paragraph 6.123: Added a new paragraph to clarify position where a heating system already has a full set of functioning heating controls
- Paragraph 6.134: Expanded paragraph to explain what the POMI would be for the example described
- Paragraph 6.139: Rearranged and expanded paragraph to provide another example in which a Solar PV measure should not be installed
- Paragraph 6.148: Reworded to clarify the focus on new build extensions and cross referenced 2.65-2.70

## Chapter 7

- Paragraph 7.2: Amended the deadline to 29 February 2020
- Paragraph 7.49: Added paragraph to be consistent with information on automatic lates section

## Chapter 8

- Paragraph 8.1: Amendment made to confirm the flexibility given to account for COVID-19 lockdown
- Paragraph 8.7: Added “Innovation measures are considered a separate measure type for the purposes of technical and score monitoring from 1 October 2020”

## Chapter 9

- Table 27 Row 3: Added lines to explain the information required for microgeneration measures including shared ground loops, and DHS measures
- Table 27 Row 4: Added that it must be demonstrable that a product is compliant with ‘Agrément certificate’
- Table 27 Row 6: Amended lines on PAS to correct citation and added citation of PAS2030:2019
- Table 27 Row 14: Added confirmation that a declaration will need to be provided alongside a warranty
- Table 27 Row 21: Added last sentence to signpost the FTCH checklist
- Table 27 Row 22: Reworded text to clarify when an EPC RRN can be provided for a FTCH measure and when it must be provided to demonstrate eligibility for in Social E, F and G properties.
- Table 27 Row 23: Reworded text to clarify when an EPC RRN can be provided for a FTCH measure and when it must be provided to demonstrate eligibility for in Social E, F and G properties.

## Chapter 10

- Paragraph 10.18: Added new paragraph to introduce the circumstances where paragraphs 10.19-10.25 should be followed.
- Paragraph 10.31: Updated link to the new Scottish Housing Regulator webpage
- Paragraph 10.32: moved under “Determining market rate” subheading
- Paragraph 10.33: Removed paragraph of v1.4

- Paragraph 10.36: removed 'equal to or lower' and replaced with 'equal to or greater' to reflect that the paragraph defines where a property meets the definition of market rate

## Chapter 11

- Paragraph 11.4: Added further clarification for the inclusion of air based heating systems
- Paragraph 11.5: Added paragraph to explain the eligibility of an air based heating system
- Paragraph 11.7: Added paragraph to explain the circumstance where the broken central heating uplift cannot be applied
- Paragraph 11.8: Added "(note that this does not apply in the case of properties which are temporarily without a heating system as the old one has been removed in anticipation of the replacement)"
- Paragraph 11.13: Added paragraph to explain how air based heating systems can be replaced by a boiler measure
- Paragraph 11.25: Added paragraph to explain how boiler age should be assessed
- Paragraph 11.28: Removed "in order to demonstrate to us whether or not the boiler is qualifying and"
- Paragraph 11.32: Reworded paragraph to explain who is responsible for completing the boiler assessment checklist.
- Paragraph 11.37: Reworded paragraph to explain that boiler measures should be accompanied by a warranty as per the TrustMark requirements
- Paragraph 11.38: Amended paragraph to clarify that suppliers should collect the installation warranty
- Paragraph 11.49: Added 'that meets the TrustMark requirements'

## Chapter 12

- Paragraph 12.3: Reworded paragraph to improve clarity
- Paragraph 12.11: Cross-referenced paragraphs 12.23-12.26 from the guidance for clarity.
- Paragraph 12.19: Rephrased to make clear that a person with "appropriate skills and experience" must assess the ESH to determine whether it should be repaired or replaced.
- Paragraph 12.23: Added clarification for the ESH checklist requirements where ESH is replaced by a FTCH measure
- Paragraph 12.27-12.29: Added paragraphs to clarify the warranty requirements for electric storage heater measures

## **Chapter 13**

- Revision of chapter number

## **Chapter 14**

- Revision of chapter number

## **Chapter 15**

- Revision of chapter number