

# Guidance

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## Boiler Upgrade Scheme: Property owner guidance V4.1

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This guidance is for property owners who are looking to benefit from the Boiler Upgrade Scheme (BUS). The BUS offers upfront grants to reduce the installation cost of low carbon heating technologies.

This guidance details which low carbon heating technologies and properties should be eligible. It explains how property owners can find an installer who can make an application on their behalf, what is required from them, our approach to audit and compliance, and useful contacts.

**The regulations governing the Boiler Upgrade Scheme were updated by the Department for Energy Security and Net Zero and came into force on 8 May 2024. This guidance applies where an application has been properly made on or after 8 May 2024.<sup>1</sup> For any applications properly made before 8 May 2024, please refer to version 2.5 of this guidance. See paragraph 4.44 below for a definition of properly made.**

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<sup>1</sup>See Regulation 25 of the Boiler Upgrade Scheme (England and Wales) (Amendment) Regulations 2024

**This guidance applies to applications properly made on or after 8 May 2024.**

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## Contents

<b>Boiler Upgrade Scheme: Property owner guidance V4.1</b> .....	<b>1</b>
<b>1. Introduction</b> .....	<b>4</b>
BUS Overview .....	4
Air source heat pumps (ASHPs).....	5
Ground source heat pumps (GSHPs) .....	6
Biomass boilers.....	6
Further information on low carbon heating .....	6
BUS guidance .....	7
Related publications and useful links .....	8
<b>Contact information</b> .....	9
<b>2. Roles and responsibilities</b> .....	<b>10</b>
<b>Section summary</b> .....	10
Role of government .....	10
Role of Ofgem.....	10
Role of installers .....	11
Role of property owner.....	12
Role of MCS.....	12
Role of consumer codes .....	13
<b>3. Grants</b> .....	<b>14</b>
Section summary .....	14
Grant level changes – October 2023 .....	15
<b>4. Eligibility requirements</b> .....	<b>16</b>
Section summary .....	16
Summary of eligibility requirements .....	16
Heat pumps explained .....	19
Heat pumps – eligibility criteria .....	20
Air source heat pumps.....	20
Ground source heat pumps .....	20
Hybrid heat pumps.....	21
Cascade Systems.....	22
Biomass boilers.....	23
Biomass boiler fuel and maintenance.....	24
Heating system eligibility.....	24
Commissioning Date eligibility .....	25

**This guidance applies to applications submitted on or after 8 May 2024.**

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Further information on low carbon heating .....	26
Eligible properties.....	26
Requirements for retrofit properties .....	27
Existing heating system requirements .....	27
<b>5. How to benefit from the Boiler Upgrade Scheme – the application process .....</b>	<b>30</b>
Section summary .....	30
Choosing an installer and technology .....	31
Applying for the BUS voucher .....	31
What to give an installer .....	33
Self-build evidence.....	33
Property owner consent .....	34
What giving consent means.....	38
Assisted digital .....	38
Consent in error or fraud .....	39
Completing the project .....	40
Payment .....	40
<b>6. Audit &amp; compliance .....</b>	<b>40</b>
Section summary .....	41
Why we undertake audits.....	41
Audit types.....	41
After an audit is conducted.....	43
Fraud and scheme abuse .....	45
7. Consumer rights and protections .....	47
Section summary .....	47
What to do when things go wrong .....	47
8. Reporting .....	49
Section summary .....	49
Reporting frequency .....	49
Section summary .....	51
Queries .....	51
Right of review.....	51
Complaints .....	51
Complaints about policy and policy decisions .....	51
Complaints about scheme administration .....	51
Complaints about installers .....	52

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## 1. Introduction

### BUS Overview

- 1.1. Heating homes, businesses and industry is responsible for a third of the UK's greenhouse gas emissions. Switching to low carbon heating can help to reduce a building's greenhouse gas emissions. The government's ambition is to phase out the installation of new natural gas boilers beyond 2035 to ensure that almost all heating systems used in 2050 are low carbon. Heat pumps will play a major role in the pathway to net zero emissions as they are a well-established, proven technology which deliver effective heating and offer immediate and substantial carbon savings compared to fossil fuel heating.
- 1.2. The Boiler Upgrade Scheme (BUS) aims to incentivise and increase the deployment of low carbon heating by providing targeted support to the supply chain.
- 1.3. The BUS is an installer-led scheme which provides upfront capital grants to support the installation of heat pumps and, in limited circumstances, biomass boilers in domestic and non-domestic properties in England and Wales. Grants of £7500 are available for air source heat pumps (ASHPs) and ground source heat pumps (GSHP), and grants of £5000 are available for biomass boilers. The voucher application and redemption process is shown in Figure 1.
- 1.4. The scheme has a committed budget of £450 million over three years from 2022-2025, split equally giving an annual budget allocation of £150 million per financial year.
- 1.5. On 30 January 2025, the Department for Energy Security and Net Zero announced a further £25 million of funding will be made available for the 2024/2025 financial year, increasing the total BUS budget to £205 million. In addition, The Secretary of State has also given permission for Ofgem to over-allocate vouchers to a total of £280 million<sup>2</sup>, to provide certainty that vouchers will continue to be available. This

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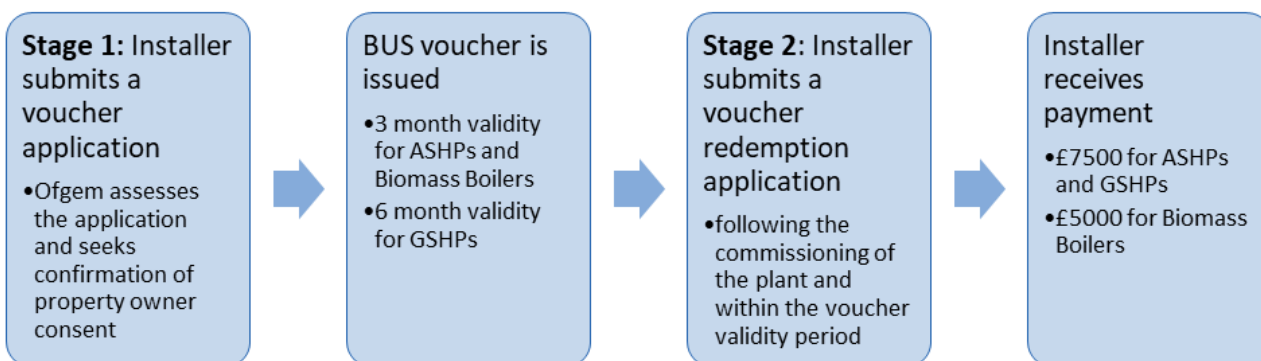
<sup>2</sup> [Approval to increase the budget and over-allocate vouchers for the Boiler Upgrade Scheme - GOV.UK](#)

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is an additional £75 million on top of the existing £205 million budget for this financial year.

- 1.6. On 21 November 2024, the government announced that the budget for 2025/2026 for the Boiler Upgrade Scheme will be £295 million.
- 1.7. In addition, between 1 April 2022 and 31 March 2027, there is a zero rate of VAT<sup>3</sup> on the installation of energy-saving materials including heat pumps and biomass boilers. This is another measure intended to incentivise the take up of energy saving materials in line with the government’s net zero objectives.
- 1.8. BUS is underpinned by the Boiler Upgrade Scheme (England and Wales) Regulations 2022<sup>4</sup>, as amended, referred to as “the BUS regulations”, laid on 22 May 2022 and amended on 8 May 2024.<sup>5</sup> Ofgem (on behalf of the Gas and Electricity Markets Authority) is the administrator of the BUS. We administer this scheme in line with the BUS regulations.

**Figure 1** – Application process overview<sup>6</sup>



### Air source heat pumps (ASHPs)

<sup>3</sup> [The Value Added Tax \(Installation of Energy-Saving Materials\) Order 2022 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/the-value-added-tax-installation-of-energy-saving-materials-order-2022)

<sup>4</sup> [The Boiler Upgrade Scheme \(England and Wales\) Regulations 2022](https://www.gov.uk/government/consultations/the-boiler-upgrade-scheme-england-and-wales-regulations-2022)

<sup>5</sup> This guidance only applies in respect of applications which were properly made after 8 May 2024

<sup>6</sup> Assuming eligibility criteria are met, and an application is successful.

**This guidance applies to applications submitted on or after 8 May 2024.**

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- 1.9. ASHP systems must be **hydronic (air-to-water)** to be eligible under BUS.<sup>7</sup> **Air-to-air systems are not eligible.**

### **Ground source heat pumps (GSHPs)**

- 1.10. GSHPs must generate heat using a thermodynamic cycle by transferring energy stored in the form of heat from the ground, including water in the ground or surface water or both, and use that energy to heat a liquid.
- 1.11. GSHPs use equipment called ground loops to harness heat energy from the ground or from water in the ground or surface water. In a **shared ground loop system**, two or more GSHPs receive the heat from the same loop through a hydraulic connection. The eligibility requirements for ground loops and shared ground loops (SGLs) are set out in Table 2 in Chapter 4.

### **Biomass boilers**

- 1.12. Biomass boilers are also supported under the scheme.<sup>8</sup> They burn solid biomass, usually wood chips or pellets, to deliver space heating and hot water to a property. Biomass boilers must deliver heat via a liquid to be eligible under the BUS.

### **Further information on low carbon heating**

- 1.13. More information and impartial advice on low carbon heating technologies and whether they might be suitable for a property can be found on the Energy Saving Trust website.<sup>9</sup>
- 1.14. Another tool property owners can use to judge whether their house might be suitable for a heat pump can be found on the GOV.UK website.<sup>10</sup> It is important to

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<sup>7</sup> The BUS regulations, Regulation 9(2)(a)(ii)

<sup>8</sup> The BUS regulations, Regulation 10

<sup>9</sup> <https://energysavingtrust.org.uk/energy-at-home/heating-your-home/>

<sup>10</sup> <https://www.gov.uk/check-heat-pump>

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note this is a general resource and not specific to the eligibility requirements of the BUS.

**BUS guidance**

1.15. This guidance is for property owners who wish to benefit from the BUS. It explains our administration of the BUS and includes details such as:

- eligibility requirements
- what is required from property owners
- how to apply for a BUS voucher
- who can apply for a BUS voucher
- our audit regime and compliance processes
- scheme reporting

1.16. This guidance does not anticipate every scenario that may arise. If a scenario arises that is not addressed in this guidance, we will adopt an approach that is consistent with the BUS regulations.

1.17. **It is the responsibility of each applicant (installers) to understand the requirements of the BUS regulations and how these apply. This guidance is not a definitive guide to the BUS regulations, and it does not constitute legal advice. The installer, with support from the property owner, is responsible for ensuring that the installation is eligible and the information on the BUS application they submit is correct. Where there is any ambiguity or conflict between the guidance and regulations, the regulations take precedence.**

1.18. Where there are future changes to the BUS regulations, we will revise our administrative arrangements accordingly.



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- 1.19. We previously sought views on our proposed administration of the BUS and published our resulting decisions here.<sup>11</sup> We are not currently seeking views on our administrative approach.
- 1.20. The underlying policy design of the BUS is set by the Department for Energy Security and Net Zero (DESNZ), formerly known as BEIS.

**Personal data**

- 1.21. Ofgem will process all personal data collected in accordance with the assimilated law version of the General Data Protection Regulation 2016/679 (UK GDPR) and the Data Protection Act 2018.
- 1.22. Ofgem uses the personal data collected to perform its statutory functions and may share this information with other organisations in line with our duties under the UK GDPR. The installer will provide you with a privacy notice which will explain the basis of the installer processing of personal data and Ofgem process.
- 1.23. For more information on how we process the personal information of installers on the BUS please refer to our installer information privacy policy.<sup>12</sup>
- 1.24. For more information on how we process the personal information of property owners on the BUS please refer to our property owner privacy policy.<sup>13</sup>

*Related publications and useful links*

- [Notice of approved grant categories and values for the Boiler Upgrade Scheme](#), (DESNZ, 21 May 2024)
- [The Boiler Upgrade Scheme \(England and Wales\) \(Amendment\) Regulations 2024](#), (Government, 17 April 2024)
- [Boiler Upgrade Scheme Regulations consultation: government response](#), (DESNZ, 14 March 2024)

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<sup>11</sup> <https://www.ofgem.gov.uk/publications/decision-administration-boiler-upgrade-scheme-bus>

<sup>12</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-privacy-notice-installers>

<sup>13</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-privacy-notice-property-owners>

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- [Boiler Upgrade Scheme: changes to grant levels](#) (DESNZ, 21 September 2023)
- [Boiler Upgrade Scheme fortnightly budget overview | Ofgem](#)
- [Boiler Upgrade Scheme fortnightly budget overview | Ofgem](#)
- [Boiler Upgrade Scheme \(BUS\)](#) (Ofgem)
- [Boiler Upgrade Scheme \(BUS\) - Guidance and resources | Ofgem](#)
- [Boiler Upgrade Scheme: Guidance for Installers](#) (Ofgem, November 2024)
- [Boiler Upgrade Scheme Regulations: approved standards](#) (DESNZ, April 2022)
- [The Boiler Upgrade Scheme \(England and Wales\) Regulations 2022](#) (UK Government, May 2022)
- [BEIS Guidance: Check if you may be eligible for the Boiler Upgrade Scheme](#) (BEIS, March 2022)
- [Future support for low carbon heat - BEIS consultation](#) (BEIS, April 2020)
- [Clean Heat Grant: further policy design proposals](#) (BEIS, February 2021)
- [Future Support for Low Carbon Heat: Boiler Upgrade Scheme - Government response to Clean Heat Grant proposals within 'Future support for low carbon heat' consultation](#) (BEIS, October 2021)
- [Consultation on Ofgem's Administration of the Boiler Upgrade Scheme](#) (Ofgem, December 2021)
- [Consultation response on Ofgem's Administration of the Boiler Upgrade Scheme](#) (Ofgem, April 2022)

## Contact information

- 1.25. Any questions on the BUS guidance or our administration of the BUS should be directed to the BUS Enquiries team at [BUS.Enquiry@ofgem.gov.uk](mailto:BUS.Enquiry@ofgem.gov.uk) or by phone on 0330 053 2006. Please note our Enquiries team is unable to provide pre-emptive assurance on applications or speculate on requests our review teams may make throughout the application or redemption journey.

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## 2. Roles and responsibilities

### Section summary

This chapter describes the roles and responsibilities of BUS stakeholders. This includes the government, Ofgem, installers, property owners, MCS and consumer codes. It sets out the requirements that the scheme places on these parties. The roles and responsibilities listed here are non-exhaustive.

### Role of government

2.1. The Department for Energy Security and Net Zero (DESNZ), formerly known as BEIS is responsible for the policy and scheme regulations. The Secretary of State also has a role in how the scheme runs and this is set out in the regulations, including but not limited to:

- approving and publishing the standards, including consumer codes<sup>14</sup> that installers and products must adhere to<sup>15</sup>
- publishing budget allocations for BUS vouchers on an annual, and potentially quarterly, basis if applicable<sup>16</sup>
- determining, publishing, and reviewing the value of BUS vouchers and, if required, altering their value<sup>17</sup>
- determining, publishing, and reviewing grant categories

### Role of Ofgem

2.2. We administer the scheme on behalf of the government. The BUS regulations describe our powers and functions for the BUS. Those functions include but are not limited to:

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<sup>14</sup> The BUS regulations, Regulation 4

<sup>15</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

<sup>16</sup> The BUS regulations, Regulation 12

<sup>17</sup> The BUS regulations, Regulation 13

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- publishing procedural guidance for prospective installers and property owners<sup>18</sup>
- processing voucher applications and voucher redemption applications<sup>19</sup>
- making payments to installers following successful voucher redemption applications<sup>20</sup>
- publishing reports on how the BUS is operating<sup>21</sup>
- monitoring and enforcing compliance with the requirements of the regulations<sup>22</sup>

## Role of installers

2.3. The obligations of installers are set out in the regulations. Installers play a key role in this scheme. Installers are responsible for:

- providing eligibility information and providing further information on request<sup>23</sup>
- being certified by the Microgeneration Certification Scheme (MCS) or an equivalent scheme<sup>24</sup>
- submitting voucher applications and voucher redemption applications on behalf of the property owner
- confirming that the information provided in relation to applications is accurate<sup>25</sup>
- informing us of any incorrect information provided
- retaining a copy of any information relied upon for the submission of voucher applications and voucher redemption applications for six years
- engaging with audit and compliance processes when requested by us<sup>26</sup>
- ensuring that the discount that the BUS grant provides is passed on to the property owner.<sup>27</sup>

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<sup>18</sup> The BUS regulations, Regulation 29

<sup>19</sup> The BUS regulations, Regulations 14, 15 and 16

<sup>20</sup> The BUS regulations, Regulation 16

<sup>21</sup> The BUS regulations, Regulation 30

<sup>22</sup> The BUS regulations, Part 5

<sup>23</sup> The BUS regulations, Regulations 14,16 and 17

<sup>24</sup> The BUS regulations, Schedule 2, Under Regulation 4 the DESNZ are responsible for determining whether a scheme is equivalent to MCS. There are currently no schemes determined by DESNZ to be equivalent to MCS.

<sup>25</sup> The BUS regulations, Regulations 14 and 16

<sup>26</sup> The BUS regulations, Regulation 17

<sup>27</sup> The BUS regulations, Regulation 14

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## Role of property owner

2.4. The regulations also set out the responsibilities of property owners. Property owners need to do the following:

- Confirm some eligibility details to us and ensure that any information or confirmation they provide to either their installer or Ofgem as part of the application process is accurate<sup>28</sup>
- Confirm their consent for a BUS voucher application to be made on their behalf by their chosen installer
- Confirm that they have read and understood their Energy Performance Certificate (EPC) and any recommendations present on the EPC
- Where a property owner is a landlord, confirming they have informed any tenant(s) of the impacts of the installation of the eligible system.
- Reply to us so that we can verify their identity when they are confirming their consent for a BUS voucher application be made on their behalf<sup>29</sup>
- Take part in audit and compliance processes when requested to by us<sup>30</sup>

2.5. If property owners need to amend any eligibility details provided to Ofgem, property owners should notify their installer, and they will convey that to Ofgem to make those changes.

## Role of MCS

2.6. MCS<sup>31</sup> is a certification scheme for microgeneration installation companies and products. It defines and maintains standards, providing confidence to consumers who wish to invest in small-scale technologies that produce electricity and heat from renewable sources.

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<sup>28</sup> See paragraph 5.35 on guidance regarding our assisted digital route for property owners that do not use emails or may not be able to access the online service to provide their consent.

<sup>29</sup> The BUS regulations, Regulation 14

<sup>30</sup> The BUS regulations, Regulation 14, 16, and 18

<sup>31</sup> <https://mcscertified.com/>

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- 2.7. Property owners should contact MCS if they have issues with the:
- installation process
  - installer
  - MCS certificate or product
- 2.8. MCS works through its certification bodies. When a case is under review, the relevant certification body may contact the property owner who submitted the case.

### **Role of consumer codes**

- 2.9. Consumer codes aim to guarantee a high-quality experience for consumers. MCS installation companies working with domestic customers must also be a member of a consumer code approved by the Secretary of State which can be found through the GOV.UK website<sup>32</sup>. MCS works closely with these consumer codes to help address complaints.
- 2.10. The two relevant consumer codes are the Home Insulation and Energy Systems Contractors Scheme (HIES)<sup>33</sup> and the Renewable Energy Consumer Code (RECC).<sup>34</sup>
- 2.11. To find out which consumer code an installer is signed up to, please check MCS's installer search.<sup>35</sup> Alternatively, property owners can check with HIES<sup>36</sup> or RECC<sup>37</sup> directly.

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<sup>32</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

<sup>33</sup> <https://www.hiesscheme.org.uk/>

<sup>34</sup> <https://www.recc.org.uk/>

<sup>35</sup> <https://mcscertified.com/find-an-installer/>

<sup>36</sup> <https://www.hiesscheme.org.uk/homeowners/find-a-hies-member/>

<sup>37</sup> <https://www.recc.org.uk/scheme/members>

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2.12. For more information and to contact the codes, please see their contact details below:

- Home Insulation and Energy Systems Contractors Scheme (HIES): <https://www.hiesscheme.org.uk/>, or telephone number: 0344 324 5242
- Renewable Energy Consumer Code (RECC): <https://www.recc.org.uk/>, or telephone number: 0207 981 0850

2.13. In the event of a dispute with an installer, consumers can access the dispute resolution service provided by the consumer codes. Code related issues are addressed directly by the consumer codes. Where there are technical aspects to a dispute, MCS works closely with the relevant consumer code to fully investigate the matter. In some cases, a dispute may need to be addressed by both organisations to ensure that they are fully resolved.

### 3. Grants

#### Section summary

This chapter sets out the voucher grant values and associated validity periods for different technology types.

3.1. The vouchers available for BUS installations have a set grant value and validity period based on the technology. Table 1 shows the total grant value and validity period for each eligible technology.

3.2. The value of the grants will not change based on the cost or size of the installation.

**Table 1 – Technology specific grant values and validity periods valid from 23 October 2023**

<i>Technology type</i>	<i>Voucher Validity Period</i>	<i>Grant Value (effective Monday 23 October 2023)</i>	<i>Grant Value (23 May - 22 October 2023)</i>
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**This guidance applies to applications submitted on or after 8 May 2024.**

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<i>Air source heat pump</i>	<i>3 months</i>	<i>£7500</i>	<i>£5000</i>
<i>Ground source heat pump</i>	<i>6 months</i>	<i>£7500</i>	<i>£6000</i>
<i>Biomass boiler</i>	<i>3 Months</i>	<i>£5000</i>	<i>£5000</i>

### **Grant level changes – October 2023**

3.3. On Thursday 21 September 2023, DESNZ issued a change notice<sup>38</sup> in accordance with the BUS Regulations to increase the BUS grant level for ASHPs and GSHPs<sup>39</sup>. These grant changes were active from Monday 23 October 2023 and the grant levels are set out in Table 1.

### **Grant Categories**

3.4. Currently, grant values are split by technology type only: ASHP, GSHP and biomass boilers.

3.5. The Secretary of State has the power to review and differentiate the current set of grant categories to provide more targeted support for certain eligible system types and properties.

3.6. The Secretary of State will publish a notice of grant categories on the Government website. 28 days later the new set of grant categories will come into effect. There will only be one set of grant categories with grant values at any one time. Once the new set of grant categories comes into force this will have the effect of deactivating the previously published set.

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<sup>38</sup> [Changes to the Boiler Upgrade Scheme, October 2023 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/changes-to-the-boiler-upgrade-scheme-october-2023)

<sup>39</sup> The BUS regulations, Regulation 13(4)



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## 4. Eligibility requirements

### Section summary

This chapter outlines the eligibility requirements for the Boiler Upgrade Scheme. It describes the criteria that, installers properties and installations must meet in order to be eligible to receive a BUS voucher and grant. It also sets out how these eligibility requirements must be evidenced.

### Summary of eligibility requirements

4.1. This section summarises the key eligibility requirements for the BUS. The chapter then discusses each one in turn in more detail. The installer will be able to help the property owner understand the requirements and verify whether their property and technology meets them.

4.2. Table 2 summarises the main eligibility requirements and Table 3 summarises additional technology specific requirements.

**Table 2 - Main eligibility requirements for the BUS**

Type of Eligibility	Description
Installers	Must be MCS <sup>40</sup> accredited and certified <sup>41</sup>
Location	Properties must be located in England or Wales
Type of building	<ul style="list-style-type: none"><li>• Domestic and non-domestic properties are eligible</li><li>• Social housing is not eligible</li></ul> <p>"Eligible self-builds" as defined in paragraph 4.63 are the only eligible new builds. New builds which form part of an "excluded property development" and/or which have been owned by a developer while they were built will not be eligible</p>

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<sup>40</sup> Or equivalent scheme to the MCS

<sup>41</sup> The BUS regulations, Schedule 4

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Type of Eligibility	Description
Energy Performance Certificate	<ul style="list-style-type: none"> <li>Properties must have a valid EPC (generated in the last 10 years), unless they are an eligible self-build as defined in paragraph 4.63</li> </ul>
Previous heating system requirements	<ul style="list-style-type: none"> <li>The previous heating system (where applicable) must have been a fossil fuel heating system or an electric system that does not include a heat pump</li> <li>Certain heat generating components must be replaced.<sup>42</sup></li> </ul>
Eligible technologies	<ul style="list-style-type: none"> <li>Air source heat pumps</li> <li>Ground source heat pumps</li> <li>Water source heat pumps</li> <li>Ground source heat pumps as part of a shared ground loop (SGL)</li> <li>Biomass boilers</li> </ul>
Commissioning date	<ul style="list-style-type: none"> <li>The date on which the voucher application is properly made must not be more than 120 days after the eligible system has been commissioned</li> </ul>
Capacity limit	<ul style="list-style-type: none"> <li>45 kWth<sup>43</sup> total capacity limit</li> <li>This limit covers the vast majority of domestic and small non-domestic properties</li> <li>The collective capacity limit for a BUS SGL system is 300kWth. Individual plants connected to the SGL must not exceed the 45kW limit.</li> </ul>
Heat pump or biomass boiler system requirements	<ul style="list-style-type: none"> <li>An installer will be able to advise the property owner of which technology is most suitable for their property and help them to understand the eligibility criteria.</li> <li>Must provide heating for the purpose of both space heating and water heating</li> <li>Must be capable of meeting the full space heating <b>and</b> hot water heating demands of the property</li> </ul>

<sup>42</sup> There are some exceptions to this requirement and an installer will be able to advise if they are relevant.

<sup>43</sup> kWth means kilowatt thermal. It is a unit of heat supply capacity used to measure the output from an installation.

**This guidance applies to applications submitted on or after 8 May 2024.**

Type of Eligibility	Description
	<ul style="list-style-type: none"> <li>Must use a liquid to distribute heat</li> </ul>
<b>Other funding</b>	<ul style="list-style-type: none"> <li>The installation cannot be funded by more than one source of public funds. BUS funding cannot be used in addition to other support from public funds or government schemes, such as the Energy Company Obligation (ECO) for the same new installation.</li> <li>There must not be a previous grant from public funds for a heat pump or biomass boiler installed at the same address.</li> <li>The installation of a GSHP on to an existing SGL (which has received separate non-BUS funding for its costs and/or installation) can be eligible under the scheme.</li> </ul>

**Table 3 - Technology specific requirements**

Requirement	Heat pumps	Biomass boiler
<b>Location</b>	Urban and rural properties in England or Wales	Rural properties only in England or Wales
<b>Properties</b>	Can be installed in an eligible self-build	Cannot be installed in an eligible self-build
<b>Gas grid connection</b>	Property can be on or off the gas grid	Cannot be installed in properties on the gas grid, this includes properties with

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		a clamped or capped gas supply
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### Heat pumps explained

- 4.3. Heat pumps use electricity to draw heat from the air, ground, or a nearby water-source and transfer it into a property to provide space heating and hot water. They are more efficient than natural gas boilers, producing several units of heat for every unit of electricity consumed.
- 4.4. Due to their superior efficiency compared to fossil fuel boilers, running costs for heat pumps can be comparable to existing heating systems when they are installed to the relevant standards and in a well-insulated property. This depends on the existing heating system, and the MCS certified installer<sup>44</sup> should provide the property owner with an estimation of the system performance before a contract is signed. Replacing a gas or oil boiler with a heat pump can help reduce exposure to volatile gas and oil prices.
- 4.5. The current higher cost of electricity relative to gas means that, in some properties, installing a heat pump may initially lead to higher running costs. However, the government is committed to rebalancing energy costs to ensure that heat pumps are no more expensive to operate than a gas boiler and will be comparatively cheaper to run over time.
- 4.6. It is important that property owners understand that heat pumps perform best in a well-insulated property. From 8 May 2024, we accept EPCs with insulation recommendations. However, we expect that installers have a discussion with property owners about the benefits of energy efficiency measures and potential measures the property owner could take.
- 4.7. Insulation measures, such as cavity wall and loft insulation, are relatively low-cost measures that could reduce energy bills and increase heat retention in a property. For

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<sup>44</sup> The BUS regulations, Regulation 2(1) and paragraph 1(b)(i) of Schedule 4.

**This guidance applies to applications submitted on or after 8 May 2024.**

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example, without loft insulation, around a quarter of heat is lost through the roof. These types of insulation help to keep heat inside the home, making it more comfortable and lowering heating costs.

- 4.8. More information around energy efficiency measures can be found on the government website.<sup>45</sup>

### **Heat pumps – eligibility criteria**

- 4.9. There is a minimum efficiency requirement for heat pumps<sup>46</sup> to ensure that the system is performing well and that significant carbon emission reductions are achieved. Heat pumps must have a seasonal coefficient of performance (SCOP) of at least 2.8. An installer will need to select a system that achieves this.

#### *Air source heat pumps*

- 4.10. ASHP systems must be **hydronic (air-to-water)** to be eligible under BUS. **Air-to-air systems are not eligible.**

#### *Ground source heat pumps*

- 4.11. GSHPs must generate heat using a thermodynamic cycle by transferring energy stored in the form of heat from the ground, including water in the ground or surface water or both, and use that energy to heat a liquid.
- 4.12. GSHPs use equipment called ground loops to harness heat energy from the ground or from water in the ground or surface water. This is the heat generating component of a GSHP and must be new (see Table 2 above).
- 4.13. In a shared ground loop system, two or more GSHPs receive the heat from the same loop through a hydraulic connection. Shared air loop systems are not eligible on the scheme. The eligibility requirements for ground loops and shared ground loops (SGLs)

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<sup>45</sup> [Energy Efficient Home - Invest To Save On Your Energy Bills \(energy-efficient-home.campaign.gov.uk\)](https://www.energy-efficient-home.org.uk)

<sup>46</sup> The BUS regulations, Regulation 9

**This guidance applies to applications submitted on or after 8 May 2024.**

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are set out in Table 2 above. The ground loop in relation to the second or subsequent GSHP forming part of the system does not have to be new.<sup>47</sup> The overall system capacity for any shared ground loop system must not exceed 300 kWth. The capacity of individual heat pumps connected to a shared ground loop must not exceed 45 kWth.

### *Hybrid heat pumps*

- 4.14. Some heat pumps can be categorised as “hybrid products”. These are heat pumps which are designed to work with or are integrated with another technology type. If your heat pump is installed as a hybrid, then it is unlikely to be eligible to apply for BUS. Some systems that can be installed as a hybrid may be eligible if they are installed as a standalone unit and replace an existing system. Upon receiving an application, we will assess the product against the criteria set out in the regulations to determine if it is eligible. While we cannot provide an up-front assessment of eligibility for each and every product, we have provided a non-exhaustive list of example hybrid systems below.
- 4.15. **Integrated fossil fuel hybrid systems:** Heat pump systems which include an integrated fossil fuel boiler do not meet the definition of air source or ground source heat pumps given in the regulations.<sup>48</sup> Therefore, they are ineligible for BUS. Examples include gas and oil boilers. This list is not exhaustive.
- 4.16. **Fossil fuel hybrid compatible systems:** Systems which comprise both a heat pump and a fossil fuel boiler are ineligible. Heat pump systems which have the capability to be installed alongside a fossil fuel boiler may be eligible for BUS where a fossil fuel boiler is not present.
- 4.17. **Solar photovoltaic (PV) compatible systems:** Heat pumps which can be installed to integrate a solar PV product may be eligible for BUS. Typically, the solar PV installation only contributes to the electrical input required of the heat pump and does not directly generate heat.

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<sup>47</sup> The BUS regulations – Regulation 9(1)(a)

<sup>48</sup> The BUS regulations, Regulation 2(1)

**This guidance applies to applications submitted on or after 8 May 2024.**

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### *Cascade Systems*

- 4.18. Cascade systems can be eligible under BUS, but **only one voucher maybe issued for a cascade system**. Cascade systems are systems that serve the hot water and space heating needs of a single eligible property (or that property and a related property) and are made up of more than one heat pump. For example, two hydraulically linked air source heat pumps serving just one property would constitute a cascade system. A related property includes adjoining properties such as an annex or swimming pool, which are available for the use of the owner of the first property, and which are not covered by the first property's EPC.
- 4.19. The following cascade system setups may be eligible on the BUS, **provided that they serve only an individual property (or an individual property and a related property)**.
- 4.20. **Air source and air source heat pumps:** Heat pump systems which are comprised of two or more air source heat pumps. The total capacity of the systems must not exceed 45kwth.
- 4.21. **Ground source and ground source heat pumps:** Heat pumps systems which are comprised of two or more ground source heat pumps are eligible for BUS if they serve an individual property (or an individual property and a "related" property). The total capacity of the system must be 45kwth. This set up is different from a shared ground loop system because all heat pumps are providing heat to the same property, as opposed to one property each.
- 4.22. **Air source and ground source heat pumps:** Heat pump systems which are comprised of both air-source and ground-source heating are eligible for BUS.<sup>49</sup> The total capacity of the systems must not exceed 45kwth.
- 4.23. Only one MCS certificate should be generated in respect of a cascade system application; this should be provided to Ofgem at the voucher redemption stage.

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<sup>49</sup> The BUS regulations, Regulation 2(1) - a heat pump means a plant which is an air source heat pump, **or** a ground source heat pump, or both

## **Biomass boilers**

- 4.24. Biomass boilers are also supported under the scheme.<sup>50</sup> They burn solid biomass, usually wood chips or pellets, to deliver space heating and hot water to a property.
- 4.25. Biomass boilers must deliver heat via a liquid.
- 4.26. Biomass boilers may include a cooking function, providing that cooking function cannot be controlled independently of the heating or hot water.
- 4.27. Biomass stoves which are designed and installed to burn wood pellets to generate heat which is radiated directly into the room in which it is installed are not eligible.
- 4.28. Biomass boilers may only be installed in properties located in rural areas with no mains gas connection.<sup>51</sup>
- 4.29. Property owners can check if their property is in a rural area by using the ONS database. There are websites that facilitate an easy search of the database for property owners,<sup>52</sup> and provide a 'Rural Urban Classification'. If the postcode is in an area designated as rural, the indicator will be D1, D2, E1, E2, F1, F2. If the postcode is in an urban area (A1, B1, C1, C2), then the property is not eligible for the installation of a biomass boiler under the BUS.
- 4.30. Biomass boilers installed in self-build properties are not eligible for support under BUS.<sup>53</sup> See paragraph 4.63 for the definition of an eligible self-build.
- 4.31. The installed biomass boiler must have an emissions certificate which demonstrates that polluting emissions are kept to a minimum.<sup>54</sup> The property owner does not have

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<sup>50</sup> The BUS regulations, Regulation 10

<sup>51</sup> The BUS regulations, Regulation 11

<sup>52</sup> [www.findthatpostcode.uk](http://www.findthatpostcode.uk)

<sup>53</sup> The BUS regulations, Regulation 11

<sup>54</sup> The BUS regulations, Regulation 10(1)(d)



**This guidance applies to applications submitted on or after 8 May 2024.**

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to source the emissions certificate; the installer will help to select a boiler which meets the emissions requirement.

*Biomass boiler fuel and maintenance*

- 4.32. Burning wood of the correct quality and sustainability standards is vital to minimise emissions and maximise system efficiency. Property owners can use the Biomass Suppliers List (BSL)<sup>55</sup> to find fuel that meets these standards. The BSL is a list of eligible wood fuels. Fuel types registered on the BSL include: logs, woodchip, wood pellets and wood briquettes.
- 4.33. The installer should provide written details of the specified fuel for the installed system along with fuel storage and handling requirements. The installer should also provide the property owner with the system’s maintenance requirements and maintenance services available. Many biomass boiler manufacturers require use of specific fuels and regular maintenance checks for the system warranty to remain valid. The property owner should check these requirements with their installer.

**Heating system eligibility**

- 4.34. The new low carbon heating system will need to completely replace an existing fossil fuel heating system or electric heating system which does not include a heat pump.<sup>56</sup> Certain heat generating components of the original heating system can be retained including immersion heaters, circulation pumps and solar thermal collectors. A full list of these retainable parts can be found in our installer guidance.<sup>57</sup>
- 4.35. The heat pump or biomass boiler must be capable of meeting the full space heating and hot water heating demands of the property or to a single house and any related property. A related property can include adjoining properties like an annex or swimming pool, which are available for the use of the owner of the first property, and which are not covered by the first property’s EPC.

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<sup>55</sup> <https://biomass-suppliers-list.service.gov.uk/>

<sup>56</sup> The BUS regulations, Regulation 5, Regulation 9(1)(a) and Regulation 9(2)(c)

<sup>57</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-guidance-installers>

**This guidance applies to applications submitted on or after 8 May 2024.**

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4.36. For heat pumps, fossil fuel heating systems include but are not limited to those fuelled by gas, oil, Liquefied Petroleum Gas (LPG) and coal. Biomass boilers may replace fossil fuel heating systems fuelled by oil, LPG, and coal, but may not replace the heating system in a property with a gas supply, including where the gas supply has been capped or clamped. Electric heating systems include storage heaters, electric panel radiators and electric boilers

4.37. The installation of some low-carbon technologies alongside the installation of the BUS funded plant is permitted so long as the heat pump or biomass boiler is capable of meeting the full space heating and hot water heating demands of the property. Other low-carbon technologies that may be permitted are supplementary electric heaters, including immersion heaters, circulation pumps or solar thermal collectors.

4.38. Existing low-carbon technologies such as solar panels may be retained, so long as they are not the main source for providing space heating or hot water to the property- this must be provided by the heat pump or biomass boiler.

*Commissioning Date eligibility*

4.39. We strongly encourage installers to wait until a voucher application has been made and the voucher issued before commissioning the eligible system at a property. However, we understand that in some circumstances, commissioning may occur prior to submitting a voucher application. Should this be the case, property owners should seek confirmation from their installer that their planned commissioning and application dates will still allow them to successfully apply for BUS.

4.40. "Commissioned", in relation to a heat pump or biomass boiler, means the completion by the installer of the tests and procedures that show it is operating correctly, producing heat, and that it complies with MCS standards. A system can only be commissioned when the whole heat pump or biomass boiler system, including every emitter included in the design, has been installed to MCS and manufacture requirements that the system will operate with. The installer is responsible for commissioning the system.

4.41. The "Commissioning date" is the date on which the tests in 4.38 have been completed, which must be recorded on the MCS certificate by the installer.

4.42. Where a system has been commissioned prior to submitting a voucher application, installers must ensure that the voucher application has been or will be, properly made within

**This guidance applies to applications submitted on or after 8 May 2024.**

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120 days of the commissioning date stated on the MCS certificate. A system that is commissioned more than 120 days before the date on which the voucher application is properly made will not be eligible on the BUS. This applies to applications that have re applied following a withdrawal, revocation or voucher expiry. The scheme is installer-led, and, it is the installer's responsibility to ensure the application meets the eligibility requirements.

4.43. The installer should only submit a redemption after the system has been fully commissioned in line with 4.41

4.44. A voucher application is only considered 'properly made' when we have received the voucher application, property owner consent and any additional information or evidence we require to assess eligibility.

4.45. Ofgem may, in very limited circumstances, grant an extension to the 120-day commissioning rule.

#### **Further information on low carbon heating**

4.46. More information and also impartial advice on low carbon heating technologies and whether they might be suitable for a property are available on the Energy Saving Trust website.<sup>58</sup>

4.47. An installer will also be able to advise which technology is most suitable for a property and help the property owner to understand the eligibility criteria.

#### **Eligible properties**

4.48. Only properties in England and Wales are eligible.<sup>59</sup>

4.49. Domestic and non-domestic properties are eligible.<sup>60</sup>

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<sup>58</sup> <https://energysavingtrust.org.uk/energy-at-home/heating-your-home/>

<sup>59</sup> The BUS regulations, Regulation 1(2)

<sup>60</sup> The BUS regulations, Regulation 5

**This guidance applies to applications submitted on or after 8 May 2024.**

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4.50. Properties must have a valid Energy Performance Certificate (EPC) unless they meet the definition of an eligible self-build set out in 4.63.

4.51. Domestic and non-domestic properties include, but are not limited to, owner-occupied properties, properties rented out to tenants, second homes and holiday homes.

4.52. Properties such as churches and park homes may be eligible if an EPC can be issued on the basis that it is a property, and all other eligibility requirements are met.

4.53. If an individual owns multiple properties, they are eligible to apply for a BUS voucher for each property. The BUS regulations permit one voucher to be redeemed per legally separate property.

*Requirements for retrofit properties*

4.54. Where a property has had any previous heating system installed and was first occupied or used before the BUS funded installation was commissioned, the following requirements will apply. Separate requirements for eligible self-builds are set out below at 4.63.

*Existing heating system requirements*

4.55. The previous heating system in the property, which is being replaced by the BUS funded installation, must have been **a fossil fuel-based heating system or an electric heating system** (not including heat pumps).<sup>61</sup>

**Energy Performance Certificates (EPCs)**

4.56. All applications will need to provide a valid EPC for the property at the voucher application stage only, unless the property is an eligible self-build.<sup>62</sup> A valid EPC means the most recent EPC issued for the property and one which is no more than 10 years old.<sup>63</sup> **An EPC is not required at the voucher redemption stage.**

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<sup>61</sup> The BUS regulations, Regulation 5(1)(c)(ii)

<sup>62</sup> The BUS regulations, Regulation 6

<sup>63</sup> The BUS regulations, Regulation 2(2)

**This guidance applies to applications submitted on or after 8 May 2024.**

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- 4.57. We will accept EPCs with insulation recommendations. However, we expect that property owners and installers will discuss the benefits of energy efficiency measures, such as cavity wall and loft insulation, and potential measures the property owner could take.
- 4.58. It is important to understand that heat pumps perform best in a well-insulated property.
- 4.59. Insulation measures, such as cavity wall and loft insulation, are relatively low-cost measures that could reduce energy bills and increase heat retention in a property. For example, without loft insulation, around a quarter of heat is lost through the roof. These types of insulation help to keep heat inside the home, making it more comfortable and lowering heating costs.
- 4.60. Property owners who do not occupy the property must discuss the impacts of installing a heat pump system with their tenants. Ensuring that they understand the implications of installing an ASHP, the advantages and disadvantages of addressing insulation.
- 4.61. More information around energy efficiency measures can be found on the government website<sup>64</sup>

### **Grant funding**

- 4.62. There are restrictions on previous grant funding. An application is not eligible for BUS where:
- There has been a previous grant from public funds for a heat pump or biomass boiler installed at the same address.
  - The eligible heat pump or biomass boiler being installed under BUS has also been promoted as a measure under the Energy Company Obligation (ECO) scheme.
  - The eligible heat pump or biomass boiler being installed under BUS has received another grant from public funds for any of the costs of the purchase or installation of the eligible system.

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<sup>64</sup> [Energy Efficient Home - Invest To Save On Your Energy Bills \(energy-efficient-home.campaign.gov.uk\)](https://www.energy-efficient-home.campaign.gov.uk)

**This guidance applies to applications submitted on or after 8 May 2024.**

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### **Eligible self-builds**

4.63. Properties which have not had any previous heating system installed and have not been occupied or used prior to commissioning of the eligible heat pump, will be assessed against self-build eligibility requirements.

4.64. Heat pumps installed in self-builds are eligible for BUS funding. Biomass boilers are not eligible for BUS funding in self-builds.

4.65. Eligible self-builds include properties where a builder is contracted by an individual to create a 'custom-build' or where a private individual builds it as a DIY 'self-build' project. Self-build buildings only meet the eligibility requirements where all of the following criteria are met:

- The building was built principally with the use of the labour or resources of the first owner (including where the resource was a loan which the first owner was liable to repay)
- The new building has not, while the building was built or at any subsequent time, been owned wholly or partly by a person who is not an individual
- The building is not part of an excluded property development. An excluded property development means a development of multiple buildings constructed on a plot acquired from a person who decided or offered the plans or specifications to which the buildings were wholly or mainly built<sup>65</sup>.
- Properties built by development companies as part of a wider development, or which were owned by a company while they were built, do not meet the requirements outlined in paragraph 4.65 and are therefore not eligible to receive BUS funding.<sup>66</sup>

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<sup>65</sup> The BUS regulations, Regulation 7(2)

<sup>66</sup> The BUS regulations, Regulation 5(1)(d)

**This guidance applies to applications submitted on or after 8 May 2024.**

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4.66. Where an installer is applying for a BUS grant for a self-build property, we require them to provide evidence on behalf of the property owner that the property is an eligible self-build.

4.67. Evidence provided must demonstrate that both the funding and ownership criteria noted in paragraph 4.65 have been satisfied.

### **Social housing**

4.68. Social housing is not eligible for BUS. Social housing is in part defined as accommodation made available for people whose needs are not served by the commercial housing market.<sup>67</sup> This could include rental accommodation made available below the market rate or shared ownership arrangements. Support for the decarbonisation of social housing is available through the Social Housing Decarbonisation Fund (SHDF) in England and the Optimised Retrofit Programme in Wales.

4.69. Properties that have undergone a sale through the “Right to Buy” scheme are not classified as social housing.

## **5. How to benefit from the Boiler Upgrade Scheme – the application process**

### **Section summary**

This chapter explains how property owners can take advantage of the Boiler Upgrade Scheme through their installer. It sets out the information and documentation that property owners may need to provide. It also describes how property owners should provide consent to their installer’s voucher application.

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<sup>67</sup> For the full definition, please refer to section 68 of the Housing and Regeneration Act 2008.

**This guidance applies to applications submitted on or after 8 May 2024.**

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5.1. The scheme is designed to provide a simple process for property owners to obtain the discount by minimising what they need to do to benefit from the grant. It is an 'installer-led' two stage application process, which means the property owner's chosen installer will apply for and then redeem the voucher themselves. We expect installers to discount the value of the grant from the total cost paid by the property owner and include this in their quote.

**Choosing an installer and technology**

5.2. An MCS installer applies to Ofgem for BUS grants on behalf of property owners. To be able to do this, MCS installers must create a BUS account.

5.3. MCS have a find an installer tool on their website<sup>68</sup> and the option to filter for installers that have created a BUS Account. Ofgem does not approve or accredit installers under BUS.

5.4. The property owner's chosen installer will need to be certified by MCS. This demonstrates that they are technically competent, and that the installation will be compliant with this aspect of scheme requirements. It will also ensure that the property owner is covered by consumer protection schemes governing the products and their performance, as well as the quality of the installation and service they receive from the installer. For more information on consumer codes, please see chapter 6.

5.5. As with all property improvements, we encourage property owners to obtain a quote from multiple installers. Comparing quotes should help property owners to decide if they're getting a fair price.

**Applying for the BUS voucher**

5.6. The voucher application will be led by the installer.<sup>69</sup> Once the property owner has selected their preferred installer, the installer should:

- apply to us for a voucher representing the grant amount. The property owner will likely need to assist the installer by sharing information and evidence to the installer demonstrating that the property and chosen technology are eligible

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<sup>68</sup> <https://mcs-certified.com/find-an-installer/>

<sup>69</sup> The BUS regulations, Regulation 14



**This guidance applies to applications submitted on or after 8 May 2024.**

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- provide the property owner’s contact details to us so the property owner can consent to the voucher application
- receive the voucher from us if the voucher application is successful
- complete the installation in line with industry standards and scheme requirements
- provide the property owner with the appropriate post-installation documentation such as the MCS certificate for the heat pump or biomass boiler and emission certificate for biomass boilers
- redeem the voucher following installation
- receive the grant payment from us, on behalf of DESNZ

5.7. All vouchers have a set validity period to ensure that installers only apply for vouchers when they need them. We are not able to extend validity periods under any circumstances. Vouchers for ASHPs and biomass boilers are valid for three months. Vouchers for GSHPs are valid for six months. If a voucher expires before work is complete and commissioned, the installer will be able to submit a new voucher application for the same installation.

5.8. Installers may apply for a voucher retrospectively after the installation has been commissioned. However, please note that if a system is installed and commissioned before applying for a voucher, the property owner and the installer will be doing so at additional risk.

5.9. We will issue a BUS voucher to the installer in the form of an email. BUS vouchers are issued by us on behalf of the Secretary of State.

5.10. Property owners will also be notified when we issue a BUS voucher to an installer. The notice will outline the voucher validity period. If the system is not installed within that validity period, a new application must be made, and consent will need to be re obtained. Please see section 4.41 regarding the 120-day commissioning rule.

Your chosen installer will be able to withdraw and reapply if necessary. This will allow installers to re-use data from withdrawn applications. Property owners will be required to submit their consent for any new application. Before withdrawing, please discuss with your installer and make sure you are familiar with paragraph 4.43 on the 120-day commissioning rule.

**This guidance applies to applications submitted on or after 8 May 2024.**

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*What to give an installer*

5.12. Property owners will need to provide evidence to the installer for them to be able to make a voucher application to us. This will include information about the property owner and their property. Where a property owner has a genuine concern or needs to provide evidence directly to us rather than via their installer, for example sensitive documents such as bank statements or mortgage documents, we will consider these situations on a case-by-case basis. Please contact us at [BUS.propertyowner@ofgem.gov.uk](mailto:BUS.propertyowner@ofgem.gov.uk) for assistance with this.

5.13. However, before doing this, the property owner should ensure they have obtained a reference for their application from the installer where possible. They must use this reference number in any correspondence they send us. The reference number will begin with "GID...".

*Self-build evidence*

5.14. If the property is a self-build, the property owner must provide evidence of this to their installer. The installer will provide this information to us during the application. Note that it is only necessary to provide sufficient evidence that the property satisfies the definition of self-build set out at paragraph 4.63. The list below is an indicative, non-exhaustive list of the types of evidence that could be used to demonstrate that a property is a self-build. It is unlikely that all of the evidence listed below will be required. Sensitive information on these documents that does not impact on us judging whether the definition has been met (eg bank details) can be redacted by the property owner if they so wish.

5.15. Acceptable evidence to prove a property is a self-build can include but is not limited to the below, but evidence provided must demonstrate that the property was principally funded using the labour/resources of the first owner, has never been owned by a non-individual, and is not part of an excluded property development:

- proof of property ownership (eg a copy of title deeds, contract of sale, letter from a solicitor, build contract)
- documents confirming you received a self-build VAT exemption, self-build loan or mortgage
- an invoice for substantial structural materials or labour (eg foundations or timber frame, smaller works such as re-wiring or kitchen-fitting will not be sufficient)

**This guidance applies to applications submitted on or after 8 May 2024.**

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- self-build insurance
- copies of bank statements demonstrating payment of invoices.
- trader and builders' invoices or contracts

5.16. Installers need this information to complete an application. The file upload feature on the BUS portal has a file size limit of 20MB and files must be uploaded in PDF format.

5.17. The evidence submitted must clearly show the name of the individual property owner associated with the voucher application, the site address, a description of the land and the date when the property ownership was transferred for us to be able to make an assessment on property eligibility.

5.18. If the eligible self-build does not yet have a confirmed address, we will accept a temporary address given by the local authority, approved planning reference number<sup>70</sup> or the coordinates of the property, provided that these details are used consistently throughout the process.

### **Property owner consent**

5.19. Once the installer has submitted an application for a voucher, the property owner will be contacted by us via email to provide their consent to the installer making an application on their behalf.<sup>71</sup> This email will come from [boiler.upgrade.scheme.ofgem@notifications.service.gov.uk](mailto:boiler.upgrade.scheme.ofgem@notifications.service.gov.uk).

5.20. Seeking consent is solely for Ofgem to confirm that an installer is applying on behalf of the property owner and the property owner has consented to this. It does not confirm that a property owner agrees to the installation of the low carbon heating system. It does not duplicate or recreate any contractual arrangements that an installer and property owner have in place.

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<sup>70</sup> Planning permission reference number and other planning evidence can only be used to confirm the address of the property. We will require additional evidence to confirm ownership and funding.

<sup>71</sup> The BUS regulations, Regulation 14 (2)

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5.21. Consent will be asked for only once and will be obtained at the voucher application stage and not at the voucher redemption stage.

5.22. Where the property is owned by an organisation, the property owner is anyone who can legally represent that organisation eg a director or company secretary. We have a Letter of Authorisation (LOA) on our website which must be used if the property is owned by an organisation that is not listed on Companies House. We will require consent from an individual. Table 4 shows the signatory of the LOA and the authority we will accept.

**Table 4 - Signatories of the LOA**

Property owner	Signatory
Company (if not listed on Companies House)	Director or Company Secretary
Charity	Trustee
School (if not Ltd company or charity)	Headteacher
Trust	Trustee
Place of worship (if not Ltd company or charity)	Religious leader of the place of worship
Housing association	Director

5.23. The property owner **must give their consent within 14 days** of the date we send the email to them. **Failure to provide consent may lead to the application being rejected.** Property owners **must provide consent via the validation link in the email** we send to them. We cannot accept consent via another medium unless the individual needs to use our assisted digital service, as described in paragraph 5.37.

5.24. Property owners will be required to confirm:

**This guidance applies to applications submitted on or after 8 May 2024.**

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- their full name<sup>72</sup>
- key project details, including the installation address, proposed low carbon heating system and quote details supplied by the installer
- that they own (or co-own) the property at the installation and where there are multiple owners of a property, that the person confirming consent is acting with the agreement of the other owners
- that they consent to the installer making a BUS application on their behalf
- that they will become the owner of the low carbon heating system upon completion of the installation
- that the property is not social housing
- that they have not received other support from public funds or government schemes, such as the Energy Company Obligation (ECO), for any of the costs of the purchase or installation of the eligible low carbon heating system in question
- that they have never had any previous funding or support from public funds or government schemes such as ECO and RHI for previous a low carbon heating system in the property.
- that they have read and understood the recommendations on their Energy Performance Certificate
- where the property owner does not occupy the property, has informed the tenant of the impact of the installation of the eligible system

5.25. We use the information provided in the voucher application to undertake a soft verification check for assurance purposes. Please note that these checks will not have an

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<sup>72</sup> Where the property is owned by an organisation this should be an individual who can legally represent the organisation eg a director or company secretary.

**This guidance applies to applications submitted on or after 8 May 2024.**

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impact on a property owner's credit rating. If we are unable to successfully complete these checks via our third-party provider, we may need to request additional documents to complete these checks.

5.26. In the event property owners are required to provide us with copies of ID documents, they will have 14 days to provide us with these. They must provide a clear, digital copy of one of the following:

- A valid UK driving licence (photocard or paper)
- The full signature and photo page of a valid passport
- A current UK firearms certificate or shotgun license
- A current national identity card
- A utility bill dated within the last 3 months. This can include a bank letter, a mortgage statement, or a bank/credit card statement

5.27. Where the EPC submitted as part of the voucher application has a loft or cavity wall insulation recommendation and the property does not meet any of the exemption criteria, we will also ask the property owner to confirm that they intend to:

- install the recommended insulation, and
- obtain a new EPC, with no recommendations for loft or cavity wall insulation to be installed, by no later than the date on which a voucher redemption application is made

5.28. The property owner will also be informed of the possibility that they may be contacted to ask for access to their property for audit purposes. Further information on the audit process is set out in chapter 6.

5.29. Where there are multiple owners of the same property, we will only need the details and confirmation of consent from one of the owners. However, that confirmation must state that the property owner giving consent on behalf of the other(s) has the authority to do so.

5.30. In cases of shared ground loop applications, where there are multiple properties being connected to a single ground loop, we will require the installer to submit a separate application for each property that intends to connect to the ground loop. We will require consent from the owner of each property that intends to connect to the loop.

**This guidance applies to applications submitted on or after 8 May 2024.**

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## **Power of attorney**

5.31. Where property owners have a lasting power of attorney (LPA) in place, the confirmation of consent for a BUS application being made should be provided by the attorney.

5.32. When applying for a BUS voucher, the installer should always provide the name of the property owner on the application alongside their residential address and installation address (if different).

5.33. However, if consent is to be confirmed by the attorney, the consent email field should be populated with the email address of the attorney. The installer must inform Ofgem that the consent will be provided by an attorney whereby we will seek further information.

5.34. For any LPA registered on or after 1 September 2019, we will require the surname of the property owner (the donor) and the LPA access code. If the LPA is registered before 1 September 2019, we will require a copy of the LPA. For more information on LPA, please see government portal.<sup>73</sup>

### *What giving consent means*

5.35. It's important to remember that the property owner is only consenting to an installer making a BUS application on their behalf. This is so that we have assurance that the application is being made in good faith.

5.36. It does not mean the property owner has committed to working with a particular installer. That's something that needs to be handled separately through the contract the property owner signs with the installer.

### *Assisted digital*

5.37. We realise that some property owners do not use emails or may not be able to access the online service to provide their consent. If the installer is unable to provide an email address for the property owner, we will contact them via an alternative channel such as telephone or post. As this might take longer, we will allow 28 days for the property owner to

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<sup>73</sup> <https://www.gov.uk/view-lasting-power-of-attorney>

**This guidance applies to applications submitted on or after 8 May 2024.**

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provide consent. As with the standard consent process, it is important that the property owner responds within the required deadline. Failure to do so may lead to the application being rejected and the application process will have to be started again.

5.38. Ofgem will provide a Welsh translated service where the installer requests this.

*Consent in error or fraud*

5.39. In situations where more than one installer has submitted a BUS application for one property, the property owner can only give their consent to one of them. Once consent is given, we'll reject any applications from other installers.

5.40. Where consent has been provided in error, please contact us at [BUS.application@ofgem.gov.uk](mailto:BUS.application@ofgem.gov.uk) so we can correct the situation.

Where we identify that consent has been provided fraudulently, we will reject an application or revoke the voucher and contact the property owner and the installer regarding the application. We will refer the matter to our counter fraud team who may be in further contacts and we may refer the case to the police. For more information on our action on fraud see sections 6.18-6.22.

5.41. We will verify the identity of property owners using the information we have received from installers as part of the application. This will be done using a third party providing an ID verification service. This verification will not impact the property owner's credit rating. Where we require additional information to verify the property owner's identity, we will request information directly from them. For more information on how we process your personal information, please see our Privacy Policy for Property Owners.<sup>74</sup>

5.42. If we require any further information from the property owner after they've confirmed their consent, we will get in touch. Otherwise, the property owner doesn't need to do anything else in relation to the BUS application.

5.43. Once the property owner has provided consent and subject to all eligibility criteria being met, a voucher will be issued to the installer. The property owner will also be informed.

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<sup>74</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-privacy-notice-property-owners>



**This guidance applies to applications submitted on or after 8 May 2024.**

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### *Completing the project*

5.44. Once a voucher for an ASHP or biomass boiler is issued,<sup>75</sup> the installer has three months from the date the application is approved to complete the installation in line with industry standards and scheme requirements, and to register the installation with MCS and to redeem the voucher. Installers will have six months to do this for GSHPs.<sup>76</sup> MCS may get in touch with the property owner regarding the quality of the installation.

5.45. If a voucher expires before work is complete, the installer will have to submit a new voucher application for the same installation.

5.46. When the new system has been installed and the installer has completed their checks, the installer must submit a voucher redemption application to us in order to claim the grant amount. When a redemption application is successful, we will notify the installer of this outcome.

### *Payment*

5.47. Once a redemption application has been approved, it will be processed for payment, along with all other redeemed vouchers, on the next scheduled payment day. We operate a weekly payment schedule, meaning we will seek to make several payments on the same day each week. Therefore, the gap between us approving a voucher redemption application and sending payment for it will be a maximum of five working days for most voucher redemption applications. Where the scheduled payment day is a public holiday, payments will be made on the following working day. We may make payments more frequently depending on our capacity. We understand it may take up to three to five additional working days for banks to clear funds and for the payment to appear in the installer's account.

## **6. Audit & compliance**

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<sup>75</sup> We will not issue BUS vouchers after 31 December 2027. The latest date a BUS voucher will expire is therefore 31 March 2028.

<sup>76</sup> The BUS regulations, Regulation 15 (2)

**This guidance applies to applications submitted on or after 8 May 2024.**

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### **Section summary**

This chapter explains our audit powers under the BUS. It explains why we audit, the types of audits we carry out, what an audit consists of and what to expect from audits. It also sets out how property owners can get help from consumer codes if they experience a problem with their heating system or installer.

### **Why we undertake audits**

6.1. To help ensure that the public money that funds the BUS has been used correctly and in line with the BUS eligibility criteria, we (and agents authorised on our behalf) run a comprehensive audit programme on properties, installations and installers that have made a BUS application or received a BUS grant. The regulations provide a range of powers that allow us to take action where non-compliance, fraud or abuse is suspected or discovered.

### **Audit types**

6.2. We carry out both site and desk audits. These are both done either on a statistical or a targeted basis.

6.3. **Desk Audits:** Desk audits can be by phone or email. In these cases, we may need additional information from the property owner or the installer as assurance that the installation is compliant with scheme eligibility. We may request that property owners send additional information to us via email. Alternatively, additional information may be sent to Ofgem via post.

6.4. **Site Audits:** We may request access at any reasonable hour to inspect a property which relates to a BUS voucher application, a BUS voucher redemption application or has had a BUS grant paid.<sup>77</sup>

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<sup>77</sup> The BUS regulations, Regulation 18

**This guidance applies to applications submitted on or after 8 May 2024.**

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6.5. We will give property owners no less than two days' notice ahead of a site audit taking place. Within the notice the following information will be provided:

- date of the audit
- the property owner's right to refuse the request.

6.6. If property owners refuse the request for an audit, this may contribute towards a decision to withhold payment, reject the voucher, or voucher redemption application, revoke a voucher, or seek to recoup any grant already paid out.

6.7. All our site auditors are Disclosure and Barring Service (DBS) checked. It is possible for a property owner to check that a request from us for access to their property is genuine by either e-mailing [BUS.enquiry@ofgem.gov.uk](mailto:BUS.enquiry@ofgem.gov.uk) or by telephoning our BUS Enquiry line on 0330 053 2006.

6.8. We are likely to request evidence from property owners when we carry out an audit. Evidence that may be requested includes but is not limited to:

- valid ID (eg passport or driving license or similar)
- proof of address (eg utility bill or council tax bill)
- proof that you own the property where the heating system is installed (eg register of title or mortgage statement/letter or any other legal document)
- copies of MCS certificate (provided by the installer)
- copies of EPCs

6.9. EPC site notes<sup>78</sup>

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<sup>78</sup> We ask that installers and property owners ensure that site notes from EPCs are retained going forward, and we will expect installers and property owners to be able to provide EPC site notes for EPCs

**This guidance applies to applications submitted on or after 8 May 2024.**

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- purchase receipts/quote for the low carbon technology (provided by the installer)
- total building heat loss calculations (provided by the installer)
- emission certificate if the system is a biomass boiler (provided by the installer)

6.10. If the property is an eligible self-build, we may require additional evidence. This includes but is not limited to:

- planning permission issued by your local authority
- building completion certificate
- HMRC VAT (Value Added Tax) exemption letter
- self-build mortgage/loan
- official invoices (with VAT number) for building materials/works addressed to the property owner. Invoice for substantial structural works (eg foundations, timber frame, large order of bricks, etc)

6.11. MCS undertake their own checks on the BUS-funded heating system installations completed by MCS installers. They will be contacting property owners directly to capture information to carry out these checks. They may contact property owners via [boilerupgradescheme@mcs-certified.com](mailto:boilerupgradescheme@mcs-certified.com) or 0333 103 8198. Property owners should aim to respond within seven days of receiving their communication. For further help, please contact MCS.<sup>79</sup>

### **After an audit is conducted**

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produced since the publication of guidance v1.1 in July 2022. We understand that it may not be possible to obtain EPC site notes for older EPCs, but we may request them and would expect to receive them if they are available.

<sup>79</sup> <https://mcs-certified.com/about-us/contact-us/>

**This guidance applies to applications submitted on or after 8 May 2024.**

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6.12. We will write to the installer and the property owner to outline the results of the audit. Where there are rectifiable issues identified by the audit, the letter will specify the actions required of the installer and if necessary, of the property owner. The installer or the property owner will be expected to address these issues and will be asked to report back to us when the necessary action has been taken. Instructions of how to report back will be contained within the communication from us. Depending on the nature of the issues identified and the response received, we may either launch a formal compliance investigation (which may involve a temporary withholding of a grant payment) or take other compliance action.

6.13. If, during our investigation or an investigation carried out by MCS or consumer codes, we come to believe that a non-compliance with the BUS regulations has occurred, we have the authority to take compliance actions against the installer. These could include withholding payments,<sup>80</sup> revoking vouchers,<sup>81</sup> offsetting payments due, or seeking repayment.<sup>82</sup>

6.14. Some examples of non-compliance are:

- the installer has failed or is failing to comply with an obligation
- the installer has been issued a voucher, or has been paid as a result of incorrect information in a grant application
- the installer is not an MCS-certified installer for the technology that was installed
- the property is not an eligible property
- the heating system is not eligible
- the heating system is not fully commissioned

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<sup>80</sup> The BUS regulations, Regulation 19 and 20

<sup>81</sup> The BUS regulations, Regulation 21

<sup>82</sup> The BUS regulations, Regulation 22

**This guidance applies to applications submitted on or after 8 May 2024.**

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- the property owner has not consented to the installation or that consent is falsified
- the property owner has previously received public funding for the low carbon heating system or for another low carbon heating system at the same address.

6.15. Where we decide to revoke a voucher or withhold or recoup a payment, we will inform the property owner and the installer of this.<sup>83</sup>

6.16. Where we believe installers and property owners have colluded in fraudulent activity, we may refer cases to the police.

6.17. Where information provided by the property owner to the installer is false or inaccurate and the installer has become aware, the installer must notify us of that fact no more than 14 days after becoming aware. Inaccurate information could lead to us revoking the voucher or withholding or recouping the grant payment from the installer. We do not have any role or responsibility relating to the contractual arrangements between installers and property owners.

### **Fraud and scheme abuse**

6.18. Fraud is a criminal offence, and we will take stringent action wherever this is suspected.

6.19. We take fraud and non-compliance within our schemes seriously. We have a dedicated Counter Fraud function that undertakes activity to detect, prevent and deter fraudulent activity on the environmental and social programmes that we deliver. Fraud or scheme abuse may be established where a person has acted dishonestly with the intention to make a gain, caused a loss, or exposed another person to risk or loss.

6.20. Irrespective of any action we may take in relation to non-compliance, there may be instances where we uncover evidence of possible criminal conduct such as fraud. In such cases, based on the nature of the information we hold, we may refer the case to law

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<sup>83</sup> In limited circumstances, where a redeemed voucher has been repaid to Ofgem, it may be possible for a subsequent BUS application to be made at the same address.

**This guidance applies to applications submitted on or after 8 May 2024.**

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enforcement agencies for investigation. There will be a suspension of payments during an investigation. This may lead to a criminal prosecution, possible loss of MCS accreditation, refusal of further BUS applications, suspending an installer account on the BUS in addition to other actions available to us.

6.21. Where we suspect fraud, we may require the installer to provide suitable evidence to prove that fraud has not occurred.

6.22. Report any concerns about suspected fraud to us by:

- emailing us at [counterfraud@ofgem.gov.uk](mailto:counterfraud@ofgem.gov.uk) or
- calling us on 0207 901 7373 where you will be invited to leave a voice message. If we require further information in order to consider the concern, we will call you back.

6.23. Our website page on counter fraud for environmental and social programmes<sup>84</sup> provides further information on what we do if we suspect fraud and what information must be provided when reporting suspected fraud.

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<sup>84</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/counter-fraud-environmental-and-social-programmes>

## 7. Consumer rights and protections

### Section summary

This chapter sets out who property owners should contact if they encounter issues related to consumer rights and protections.

### What to do when things go wrong

7.1. If a property owner experiences problems or has concerns with their new heating system, for example underperforming equipment, repairs, or safety issues, they should speak to their installer first.

7.2. All installers must be a member of MCS. If a property owner experiences problems with their installer, they should visit the MCS website and read 'What to do when things go wrong' for further advice and guidance.<sup>85</sup>As an installer-led scheme, your installer is responsible for ensuring that your application meets the eligibility requirements of the scheme.

7.3. Property owner rights are protected by the consumer codes, HIES<sup>86</sup> and RECC,<sup>87</sup> set up to promote the renewable energy sector and protect customers. MCS can advise on when and how to engage with them.

7.4. Members of HIES and RECC are from the renewable industry, and they are required to adhere to the code, which is certified by the Chartered Trading Standards Institute. A condition of MCS certification is membership to HIES or RECC. They can help deal with complaints about breaches of the consumer code, such as:

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<sup>85</sup> <https://mcscertified.com/complaints-compliance/>

<sup>86</sup> <https://www.hiesscheme.org.uk/>

<sup>87</sup> <https://www.recc.org.uk/>



**This guidance applies to applications submitted on or after 8 May 2024.**

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- where misleading information has been provided about the scheme or the renewable technology installed
- where the information in the contract and the actual service provided do not match up
- where the installer has inflated the costs provided in the quote

7.5. MCS and the consumer code organisations work closely together to address complaints for consumers. If a property owner does have a complaint or a concern, they should consider highlighting it to each organisation to make sure it can be fully investigated. These consumer codes exist to protect consumers from any harm they may face due to any MCS installer's misconduct.

## Reporting

### *Section summary*

In this chapter we set out the data we include in our regular reports, and the frequency of our reporting.

7.6. As part of our administrative responsibilities, we are required to publish reports on a quarterly and annual basis on our website.<sup>88</sup> Additionally, we will seek to publish monthly updates on the operation of the BUS. This aids transparency on how the scheme is progressing and how much budget remains available for installers to apply for on a property owners' behalf. These reports will consist of key information relating to the scheme, including the number of vouchers issued, number of vouchers redeemed, total value of grants paid and remaining budget.

### *Reporting frequency*

7.7. We will seek to publish monthly reports for each calendar month in the first week of the following month.<sup>89</sup>

7.8. Quarterly reports will be published by:

- Q1: 31 August
- Q2: 30 November
- Q3: 28 February
- Q4: 31 May

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<sup>88</sup> The BUS regulations, Regulation 30

<sup>89</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/boiler-upgrade-scheme-bus/guidance-and-resources>

**This guidance applies to applications submitted on or after 8 May 2024.**

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7.9. Annual reports will be published on the 31 July each year covering the preceding 12-month period ending with 31 March of that year.

7.10. We may also publish updates as needed when changes to our administration of the scheme occur.

8.5 All information will be published in an anonymised form.

## 8. Queries, feedback, and complaints

### Section summary

This section outlines how property owners can contact us about queries and raise complaints about the policy and the scheme administration.

### Queries

8.1. For general queries regarding the BUS please email us at: [BUS.enquiry@ofgem.gov.uk](mailto:BUS.enquiry@ofgem.gov.uk)

### Right of review

8.2. If the property owner thinks we have made an error in a decision relating to the BUS application that has been submitted on their behalf, they should talk to their installer as they are able to ask for a review of any decision we have made related to the scheme. Installers must submit a request for a review within 28 days from when we sent them the decision. Details of how they can do this are included within our separate guidance document for installers.<sup>90</sup>

### Complaints

#### *Complaints about policy and policy decisions*

8.3. Where the complaint is about the scheme's underlying policy, including the eligibility criteria, please contact DESNZ : [boilerupgradescheme@energysecurity.gov.uk](mailto:boilerupgradescheme@energysecurity.gov.uk)

#### *Complaints about scheme administration*

8.4. If a property owner has a complaint or recommendation about our administration of the scheme or concerns on how an application has been handled, they can email [feedback@ofgem.gov.uk](mailto:feedback@ofgem.gov.uk). Our Complaining About Ofgem webpage gives more information on our complaints process.<sup>91</sup>

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<sup>90</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-guidance-installers>

<sup>91</sup> <https://www.ofgem.gov.uk/about-us/contact-us/complaining-about-ofgem>

**This guidance applies to applications submitted on or after 8 May 2024.**

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*Complaints about installers*

8.5. If you have a complaint about an installer, you should raise it with them in the first instance. If you have already done so, but feel that it has not been resolved satisfactorily, you may be able to take the complaint to MCS,<sup>92</sup> HIES,<sup>93</sup> or RECC.<sup>94</sup>

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<sup>92</sup> <https://mcscertified.com/>

<sup>93</sup> <https://www.hiesscheme.org.uk/>

<sup>94</sup> <https://www.recc.org.uk/>