Conditions: guidance

Last updated version: October 2026

Introduction

As outlined in *Schedule 2* of your Phase 3 Scotland's Public Sector Heat Decarbonisation Fund Grant Offer Letter, there are a number of specific conditions relating to your project which must be resolved once the associated milestones are reached.

The purpose of this document is to provide guidance on what is required to resolve some of the common conditions, with examples of what is acceptable and templates for satisfying specific conditions. *Please note the examples provided are for generic conditions that will apply to the majority of projects. Your project may have bespoke conditions to resolve that are not covered here.*

The importance of conditions

Phase 3 Scotland's Public Sector Heat Decarbonisation Fund grant conditions help us and you – as stewards of public money – to ensure that projects are being well managed and remain compliant in line with the scheme criteria. This is critical in verifying that your project remains eligible for the full grant award.

Submitting conditions information at the associated milestone enables your relationship manager to understand your project and check eligibility as it progresses. We advise submitting this information as early as possible and by no later than the original expected due date. The evidence for resolving many of these conditions should already be provided to you by your contractors as part of efficient project delivery.

Failure to provide the information required to resolve conditions within a reasonable timeframe after the associated milestones are reached may result in grant payments being withheld or funding reclaimed at the end of the project.

Where can I find conditions?

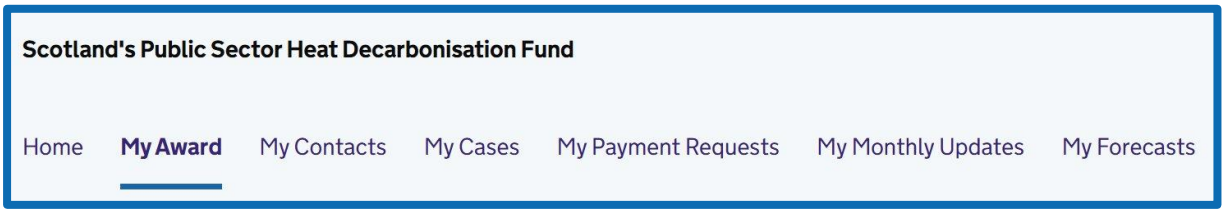
The specific conditions relating to your project can be found on the Fund's management portal and in *Schedule 2* of your Grant Offer Letter. Should you submit a change request, additional conditions may be listed in your Grant Amendment Letter following assessment and approval of the revised project scope.

When and how can I resolve conditions?

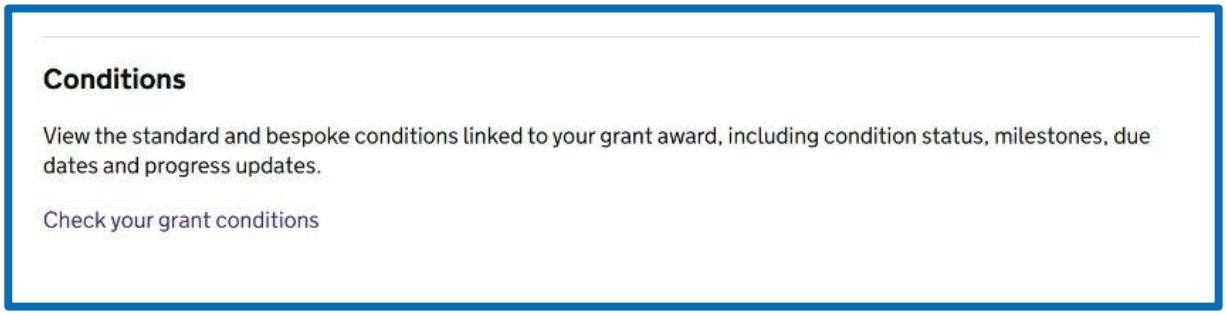
1. Use the Fund's management portal to check conditions

You can find all your conditions listed on the Fund's management portal conditions section, and while completing the monthly update section. You will also be able to see the date that you are expected to submit information to us to resolve each condition. Please review this every month and update as needed.

To access the conditions section, please got the 'My Award' tab, and scroll down to find the 'Conditions' section.



Clicking 'Check your grant conditions' will allow you to view all conditions associated with your project.

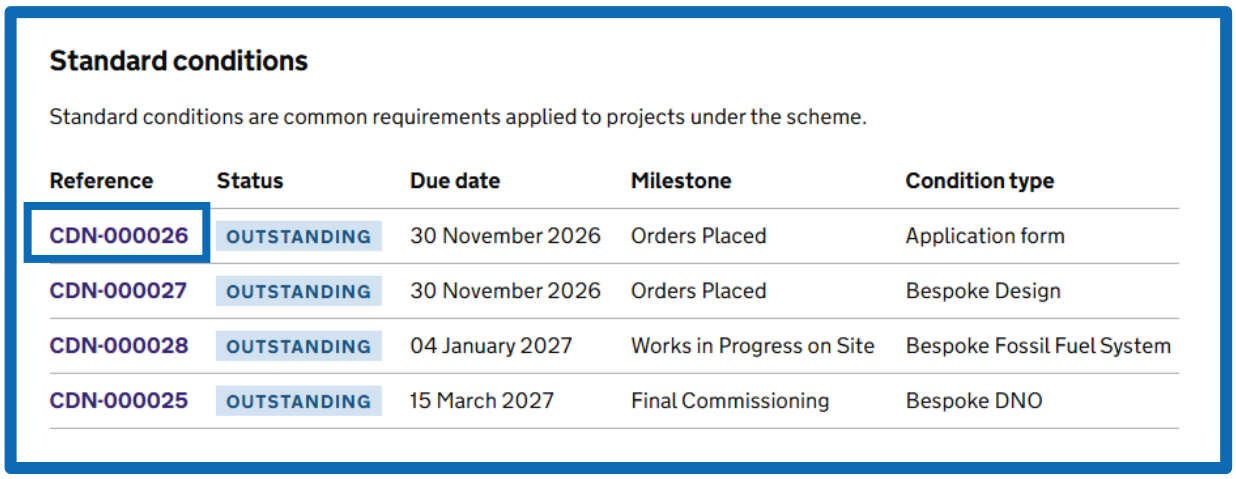


2. Submit information to your relationship manager

To enable conditions to be resolved, please send the required information via the Fund's management portal, or to your relationship manager via email as soon as possible after the associated milestone is reached. Your relationship manager will let you know once the condition has been reviewed and can be considered resolved. If you have any questions about what is required to satisfy a condition, please speak to your relationship manager.

Some conditions will require technical assessment, and you may be contacted by a member of our energy and carbon technical team with any queries or requests for clarification or further documentation.

To submit the information via the Fund's management portal, you should go to the individual condition record by clicking the reference number to the condition.

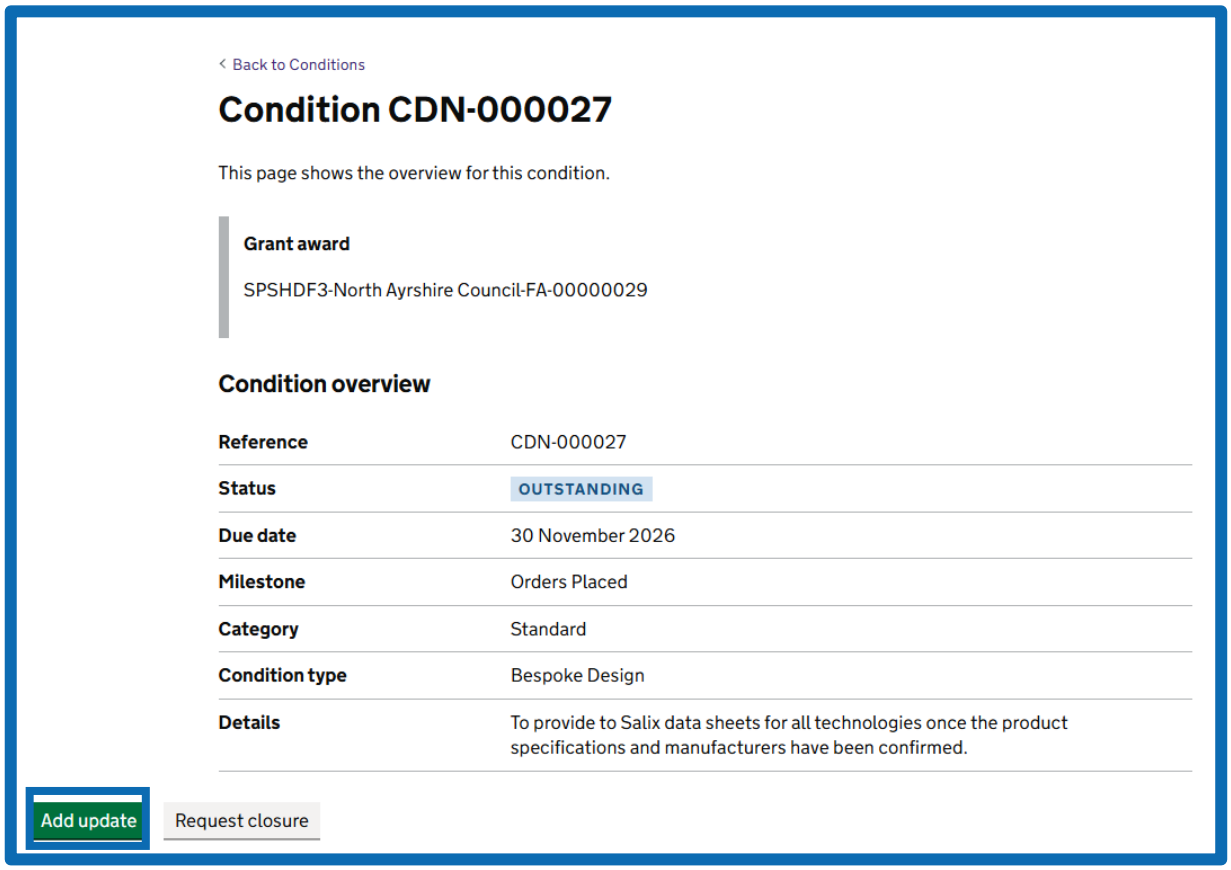


Standard conditions

Standard conditions are common requirements applied to projects under the scheme.

Reference	Status	Due date	Milestone	Condition type
CDN-000026	OUTSTANDING	30 November 2026	Orders Placed	Application form
CDN-000027	OUTSTANDING	30 November 2026	Orders Placed	Bespoke Design
CDN-000028	OUTSTANDING	04 January 2027	Works in Progress on Site	Bespoke Fossil Fuel System
CDN-000025	OUTSTANDING	15 March 2027	Final Commissioning	Bespoke DNO

By clicking 'add update', you will be able to provide commentary and upload files as supporting evidence. When you have done this, please remember to click 'save update'.



< Back to Conditions

Condition CDN-000027

This page shows the overview for this condition.

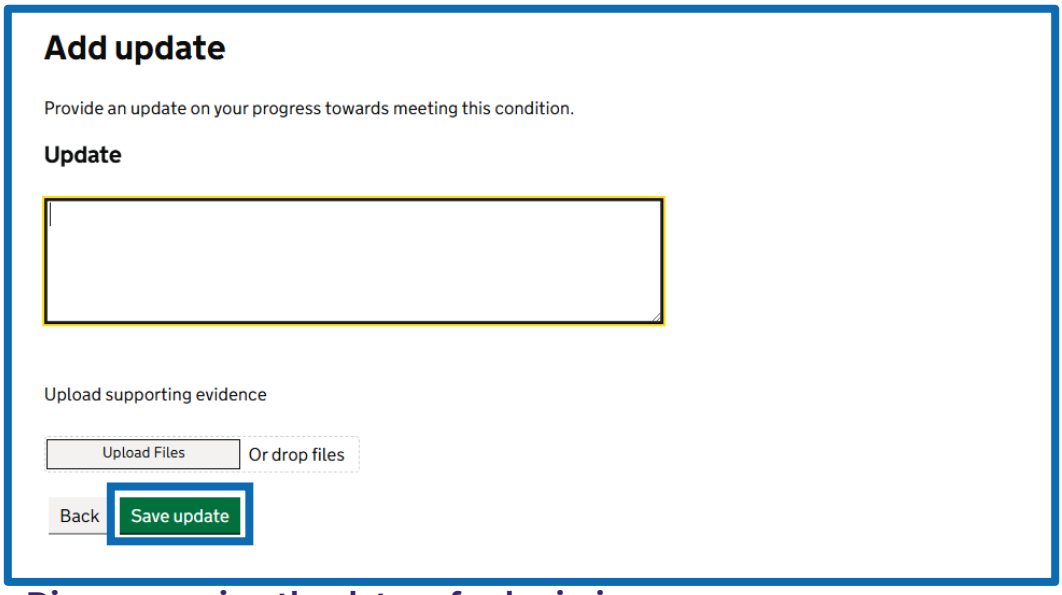
Grant award

SPSHDF3-North Ayrshire Council-FA-00000029

Condition overview

Reference	CDN-000027
Status	OUTSTANDING
Due date	30 November 2026
Milestone	Orders Placed
Category	Standard
Condition type	Bespoke Design
Details	To provide to Salix data sheets for all technologies once the product specifications and manufacturers have been confirmed.

Add update | Request closure



3. Discuss moving the dates of submission

If your project programme changes and you think the original due date is unachievable, please raise this with your relationship manager suggesting an alternative date. Please make sure you discuss the reasons for the new date with your relationship manager prior to changing this on the Fund's management portal and include these reasons or any other updates in the updates section of the conditions page.

If there are any changes to the project scope, you should inform us of these at the earliest opportunity and follow the change request process (please see the *change requests* webpage for guidance).

If you believe a condition is no longer relevant, please flag this with your relationship manager.

Common conditions

Please note the below examples are for generic conditions that will apply to the majority of Phase 3 Scotland's Public Sector Heat Decarbonisation Fund projects. Your project may have bespoke conditions to resolve that are not covered here.

1. Risk register

You are required to provide a detailed risk register once the project has been approved internally. This should identify potential risks to the project, which may range from delays to planning permission, unforeseen Distribution Network Operator (DNO) upgrade works required, noise pollution, delays in tender award or equipment lead times etc. The risk register should also include mitigation strategies, risk likelihood and level of risk.

Once you reach the post tender stage and have agreed a programme of works with your chosen contractors the risk register should be updated with their input, or an alternative version provided.

A template can be downloaded from the 'key documents' section on our website.

The Fund's management portal includes a section for providing regular updates on the key risks or issues affecting your project. This is limited to only key and most current risks. If there are any significant changes as your project progresses, we may also request that you provide an updated version of your detailed risk register.

2. Experience and governance

The purpose of this condition is to clarify who has worked on your project and the chain of decision making and accountability. If your project is audited, Salix or Scottish Government will need to know who is best placed to contact with any queries.

- **Internal:** this condition asks you to provide a written explanation of how the project will be effectively managed internally. This information cannot be provided by a third party (such as a contractor or consultant) as the purpose of this condition is to ensure your public sector body has adequate governance in place to effectively manage the project and are ultimately accountable for its delivery. This can be an organisation chart that shows the chain of decision making and reporting necessary for the project. You may also be asked to provide evidence to demonstrate which executive panel and/or board committee has oversight of the project through terms of reference or meeting minutes.

- **External:** please provide contractor details for each measure along with examples of their experience with similar projects of this type and scope and how your organisation will be holding third party consultants and contractors to account. Please also detail whether your organisation has an existing relationship with the contractor. This can be provided to your relationship manager in an email format.

3. Project approval

This will be bespoke to your organisation's approval process.

Minutes of a board meeting where the approvals were granted can be provided as evidence, or written confirmation from the board or an appropriate contact (such as the project authorising official or a director) can be provided by email.

Evidence of planning permission, or confirmation that this is not required, is another common approval condition. Again, acceptable evidence may be an email from the relevant planning authority.

4. Firm pricing

Once you reach the post-tender stage, we will require evidence that the cost of each measure listed on your approved application form (*the column 'Project cost' on the Step 4 Support Tool sheet*) are an accurate reflection of the project costs.

Alongside the above proof of costs, you should provide a summary spreadsheet to show how the final costs listed on your application form support tool have been calculated. For example, if project management fees have been split equally between all measures, then this should be shown.

Quotations for all the technologies must be provided from the appointed contractors to confirm final pricing for each technology. We require evidence of prices for all aspects of the project, ideally broken down by measure as well as by costs for equipment, installation, design etc.

The following can be used as evidence of firm pricing (this list is not exhaustive):

- Quotes (in date)
- Invoices
- Contracts – these should state the price
- Framework – the contract schedule should detail construction and payment milestones with costs per measure
- PFI, variation summary or service cost

5. Updated application form and energy saving calculations

Once the project is completed on site and you are able to provide the finalised figures for all data including costs and energy values, we will require a final revised application form confirming the scope of the project. This is essential for us to verify your total eligible grant value before final payment is made.

Prior to this, any changes to the energy savings calculations should be communicated as soon as these are identified. These figures are often updated following completion of detailed designs. Changes to the energy savings figures may result in a lower eligible grant value, requiring a higher contribution from your organisation to complete the project to the agreed scope. Higher costs following design changes or tender returns may also impact your decision to proceed with the project if additional capital is required.

Updated energy saving calculations should be provided in an unlocked Excel spreadsheet and must include all measures from the project scope including clean heating system(s) and energy efficiency measures. The values in the energy saving calculations should match your most recent application form, with a revised version provided if necessary.

Project changes and identifying the need for a change request

If there are any changes to the scope of your project at any stage during project design or delivery, a formal change request may be required. Please see below an overview of types of change which will require a formal change request and assessment by our energy and carbon technical team.

We only expect to receive a scope change request when there is reasonable confidence in the final design, specifically when designs and tenders are complete. For this reason, we expect each grant recipient to submit a maximum of one, good-quality change request to minimise queries.

As your project progresses, we encourage you to update your application form (in particular '*Step 3 Building Details*' and '*Step 4 Support Tool*'), to ensure that any minor changes do not have an impact on your eligible grant value. If you expect to submit a change request, or have any concerns about a change to your eligible grant value following a minor scope change, we ask that you contact your relationship manager as soon as possible.

6. Data sheets

We expect to see data sheets for all technologies that are to be installed once the final make and model is selected. This is required for the clean heating system(s) and energy efficiency measure(s).

The energy savings data you entered on the approved application form was calculated based on assumed performance. We need to verify that the assumptions were reasonable and that the energy savings on the approved application form will be achieved in practice by the exact equipment you choose to install. Data sheets should display key values that match both the energy saving calculations and the application form.

Heat pumps

To determine future electricity consumption, we need to see:

- Make and model
- Flow temperatures
- Capacity (kW)
- SCOP (Seasonal Coefficient of Performance)



DAIKIN

Technical Data Sheet

EWYT085B-SLA1+OP204

Performances calculated according to EN14511-3:2013

Cooling mode performances

Cooling capacity	75.11 kW	Chilled water IN/OUT	12.00 °C / 7.00 °C
Power input	28.01 kW	Chilled water flow	3.580 l/s
EER Cooling Efficiency	2.681 kW / kW	Water heat exchanger pressure drops	14.0 kPa
		Ambient temperature	35.0 °C
		Lw / Lp @ 1m	83 dB(A) / 65 dB(A)
SEER / ηs	3.90 / 153.0%	Fluid	Water
		Office Online Frame	0.000 m²°C/W

SEER declared according to EN14825, fan-coil application 12/7°C (inlet/outlet) water temperatures. Sound power level according to ISO 9614-1. SEER and IPLV.IP refer to standard unit without options

Heating mode performances

Heating capacity	62.93 kW	Heated water IN/OUT	48.00 °C / 54.00 °C
Power input	33.55 kW	Heated water flow	2.510 l/s
COP Heating Efficiency	1.876 kW / kW	Water heat exchanger pressure drops	7.78 kPa
SCOP / ηs	3.340 / 130.6%	Ambient temperature	-4.0 °C

SCOP declared according to EN14825, average climate, low temperature application Heating performances calculated with defrost effect

Unit information

Compressor type	Scroll	Refrigerant type	R32
Capacity control	STEP	Air heat exchanger type	HFP
Compressor N°	2	Air heat exchanger fans N°	4
Circuit N°	1	Air heat exchanger fans control	Phase cut
Refrigerant charge	11 kg	Altitude	000 MSL
		Water heat exchanger type	Plated Heat Exchanger

Actual refrigerant charge depends on the final unit construction, refer to unit nameplate.

Electrical information

Power supply	400 V / 50.0 Hz / 3 Ph	Max. inrush current	211 A
Running current	54.43 A	Compressor starting method	Direct on line
Max. Running current	68 A		
Max. current wires sizing	74.8 A		

Voltage tolerance ± 10%. Phase Voltage unbalance ± 3%. Electrical data referred to standard unit without options, refer to unit name plate data.

Insulation

To determine the energy savings we need to see evidence of the thermal performance of the insulating equipment:

- Type
- U-values (W/m2K)

or

- R-values are a reciprocal of U-values (m2K/W)

Product dimensions and information						
Thickness (mm)	Length (m)	Width (mm)	Pack Area (m^2)	R-Value (m^2K/W)	Packs per pallet	Code
100	10.10	1200/2x600/3x400	12.12	2.25	24	5774
150	6.65	1160/2x580/3x386	7.71	3.40	24	5773
170	5.80	1160/2x580/3x386	6.73	3.85	24	5772
200	4.85	1160/2x580/3x386	5.63	4.50	24	5771

Thermal Performance

Multi-Roll 44 has a declared thermal conductivity of 0.044W/mK.

Solar PV

Alongside the data sheet for the exact model of panel installed we would also expect a report showing the site-specific consumption. Within this report it should show:

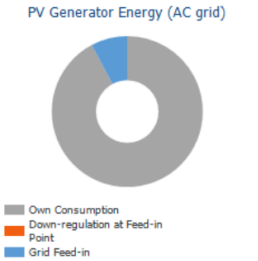
- Yield
- Export percentage

Simulation Results

Results Total System

PV System

PV Generator Output	111	kWp
Spec. Annual Yield	859.38	kWh/kWp
Performance Ratio (PR)	88.8	%
PV Generator Energy (AC grid)	95,436	kWh/Year
Own Consumption	87,986	kWh/Year
Down-regulation at Feed-in Point	0	kWh/Year
Grid Feed-in	7,450	kWh/Year
Own Power Consumption	92.2	%
CO_2 Emissions avoided	44,842	kg / year



Photovoltaic system – data sheet example	
Address	123 Example Lane
DNO	Northern PowerGrid Distribution
Commissioning Date	16/02/2023
Installed capacity (DC)	114.8 kWp
Declared Net Capacity (AC)	100 kWp
Solar modules	
Number of modules	287
Module brand and type	Trina 400W TSM 400DE09.08
Inverter	
Number of inverters	1
Inverter brand and type	1 x Huawei SUN2000 100 KTL
DC Isolators	Integrated into inverters
AC Isolators	Integrated into inverters and fitted adjacent
Predicted output	
Annual Yield	772.57 kWh/kWp or 88,721 kWh Annually
Systems communications	
Teltonika router RUT-950 to provide data connection for monitoring inverter and remote meter readings.	

Any questions?

Please see the 'frequently asked questions' webpage or ask your relationship manager for support.