

# Why and how to achieve PAS 2030 certification and TrustMark registration for your business

Green Heat Installer  
Engagement Programme

23 October 2024



# Presenters

|                 |  |                      |
|-----------------|--|----------------------|
| Pilar Rodriguez | Green Heat Installer Engagement Programme Manager, <b>Energy Saving Trust</b>  | Presenter, Q&A Panel |
| Simona Marcucci | Head of Customer Operations, <b>The Installation Assurance Authority (IAA)</b> | Presenter, Q&A Panel |
| Ron Fenwick     | Head of Certification, <b>The Installation Assurance Authority (IAA)</b>       | Presenter, Q&A Panel |

# Questions

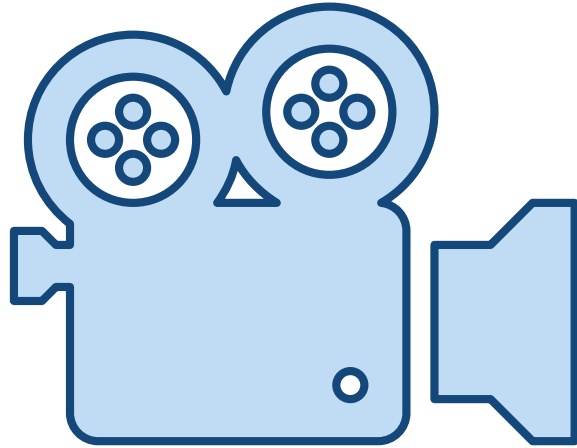
Type questions into the Questions pane of the control panel.

You can send in your questions at any time during the presentation.

These will be collected and addressed during the Q&A session at the end of the presentations.



# Recording



This presentation is being recorded but your name and attendance are hidden from the recording.

The recording will be uploaded and will be made available to watch again.

Details of how to do this will be shared with you via email after the webinar has ended.

# Have Your Say



There will be a brief anonymous poll at the end of our presentation and a short feedback survey after the webinar has finished.

Please complete this if you can so we can continue to improve the webinars we offer.

# Thermal insulation sector – challenges and opportunities

Pilar Rodriguez

23 10 24





# Green Heat Installer Engagement Programme



## Resources hub

Support hub for small businesses working on energy efficiency, heating systems and micro generation. Find research, case studies and online tools to...



## Skills, funding and certification

Discover the certification requirements as an installer or assessor looking to carry out work under various schemes.



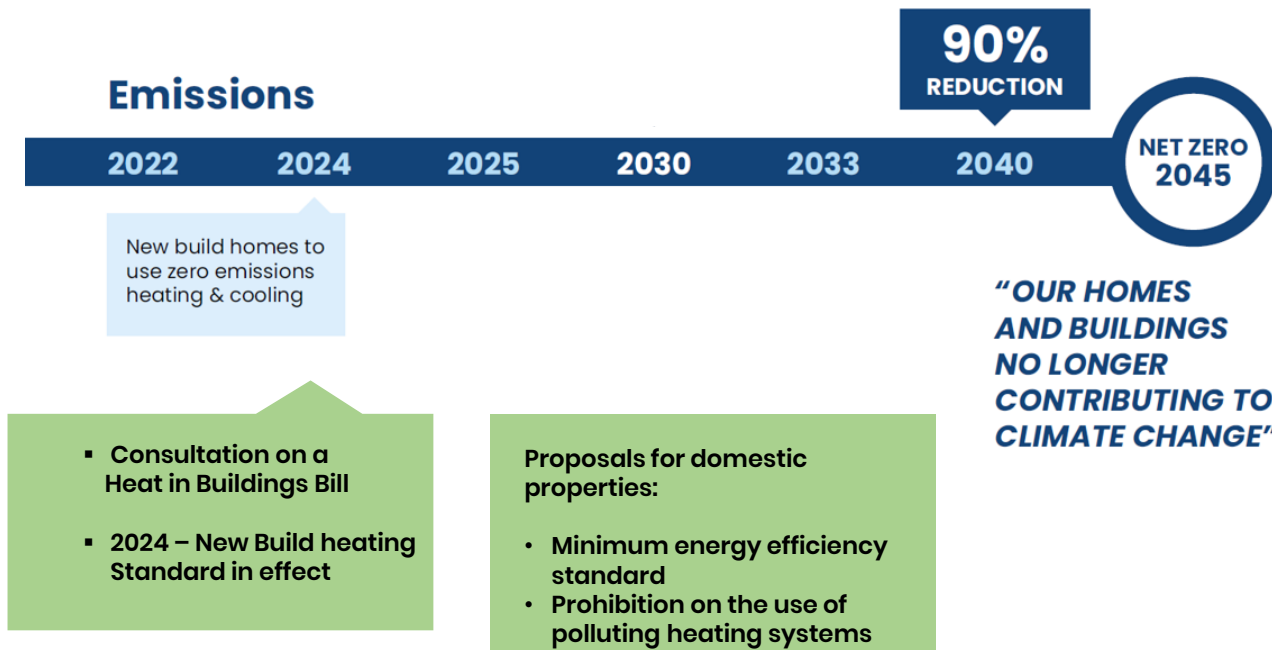
## Green heat installer events

We organise networking events, webinars, workshops and information sessions. All free of charge. Find out more about our upcoming sessions.



## Funding for your customers

Energy Saving Trust helps consumers access funding to make energy efficiency improvements and renewable energy additions to their property.





# Heat in Buildings Bill Consultation

## Domestic properties:

Proposals include setting a "Heat in Buildings Standard, which consists of two main parts:

- **Prohibition on the use of polluting heating systems** after 2045 and progressively at certain 'trigger' points before then
- Make sure that homes meet a reasonable **minimum energy efficiency standard** by the end of 2028 (private rented sector) and end of 2033 (owner-occupiers).

(separate consultation on an equivalent standard for social housing is also underway)



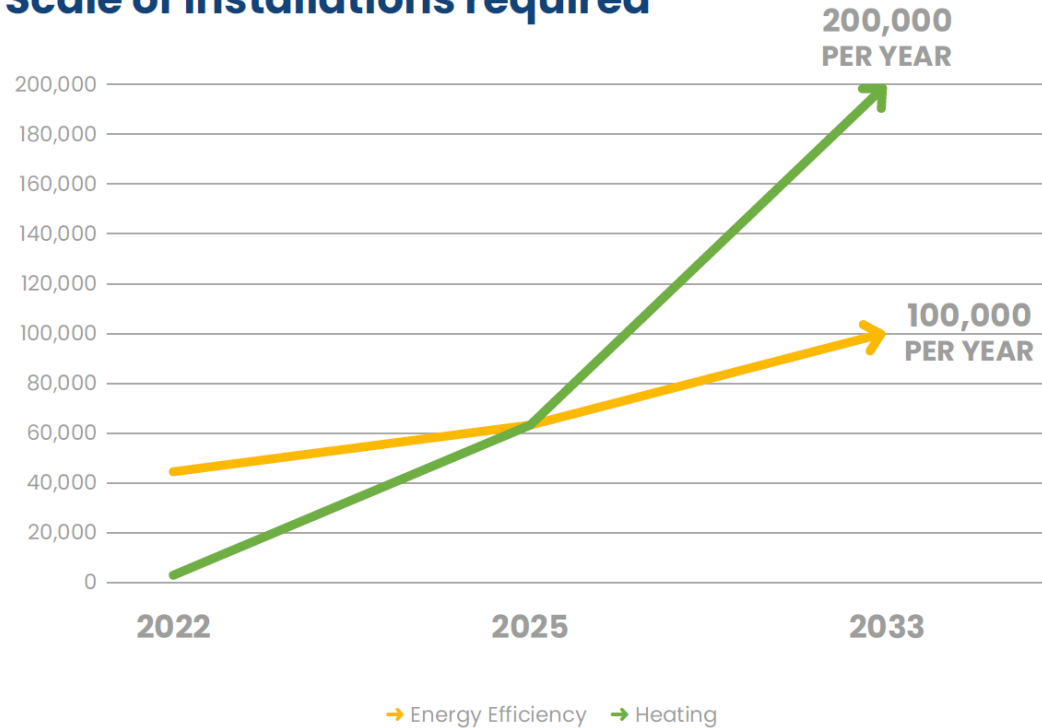
# Heat in Buildings Standard for energy efficiency

- For the **private rented sector**, the property should meet this energy efficiency standard **before the end of 2028** even if it has a clean heating system installed.
- For all other **privately owned homes**, the property should meet this energy efficiency standard **by the end of 2033** – unless the property has installed a clean heating system by then.



# Domestic energy efficiency installations

## Scale of installations required



# Funding in Scotland for the retrofit market

- [Home Energy Efficiency Programmes for Scotland: Areas Based Schemes](#)
- [Warmer Homes Scotland](#)
- [Home Energy Scotland Grant and Loan scheme](#)
- [Private Rented Sector Landlord loans](#)
- [SME loan](#)
- [Local Heat and Energy Efficiency Strategies \(LHEES\)](#)

# Green Heat Installer support – Insulation toolkit

## Insulation toolkit

### Contents

- 1 Why do homes and commercial buildings need insulation?
  - 1.1 Heat loss
  - 1.2 Typical insulation measures
  - 1.3 Policy landscape
  - 1.4 The business opportunity
  - 1.5 Frequently asked questions
- 2 Installation
  - 2.1 Product standards and selection
  - 2.2 Installation standards
  - 2.3 Pre-installation inspections
  - 2.4 Other considerations
  - 2.5 Further information
- 3 Qualifications and upskilling
  - 3.1 Typical roles
  - 3.2 Training providers
- 4 Installation certifications
  - 4.1 Requirements for TrustMark registration
  - 4.2 Achieving and maintaining TrustMark registration
  - 4.3 Consumer protection
  - 4.4 TrustMark registration checklist
- 5 Wider business considerations
  - 5.1 Potential sector risks
  - 5.2 Opportunities
- 6 Government-funded schemes and ECO4
- 7 Further resources

[insulation toolkit](#) / [1. Why do homes and commercial buildings need insulation?](#)  
/ 1.4. The business opportunity

## 1.4. The business opportunity

Why consider insulation work?

[Copy page link](#)

The energy efficiency of Scotland's homes has been improving. Since 2010, the share of the most energy efficient homes (rated EPC C or better) has increased. In 2019, 45% of Scotland's homes were rated EPC C or better. However, this leaves around 1.3 million homes still to be upgraded.

Due to Scottish Government initiatives, high energy costs, and a growing awareness of climate change, more people are now willing to invest in improving the energy efficiency of their homes. Those making improvements either use savings or take advantage of green mortgage and green loan schemes.

Lenders are increasingly willing to offer these incentives. They see energy efficient properties as a lower risk, as they are more likely to hold their value. If a homeowner is spending less on their energy bills, they are less likely to struggle to make their mortgage repayments.

Based on the 2021 Scottish house condition survey, a significant number of homes require upgrading including:

- 522,000 uninsulated cavity walls
- 529,000 uninsulated solid walls
- 694,000 uninsulated or partially insulated lofts

Based on a Scottish Government survey, levels of loft and wall insulation are higher in the social sector than in the private sector:

- 55% of homes in the private sector have wall insulation compared to 70% in the social sector.
- 63% of lofts are insulated in the private sector to 200mm or more compared to 79% in the social sector.

[← Previous section](#)  
[1.3. Policy landscape](#)

[Next section →](#)  
[1.5. Frequently asked questions](#)

# Green Heat Installer support – Procurement guide

- [Procurement guide](#)
- [Recorded webinar](#)– Procurement guidance – bid better for public sector contracts on 21 February 2024. Provides a step by step on how to develop a bid to access public contracts



# Green Heat Installer Engagement Programme – useful links



Email: [GreenInstallerScotland@est.org.uk](mailto:GreenInstallerScotland@est.org.uk)



LinkedIn Group: [www.linkedin.com/groups/5139242](https://www.linkedin.com/groups/5139242)



Email updates and quarterly newsletter subscription: [bit.ly/2PSatKL](https://bit.ly/2PSatKL)



Website: [energysavingtrust.org.uk/business/energy-efficiency/green-installer](https://energysavingtrust.org.uk/business/energy-efficiency/green-installer)



**energy**  
saving  
trust



# Thank you





# Energy Saving Trust Webinar

The Installation Assurance Authority

Simona Marcucci  
Ron Fenwick

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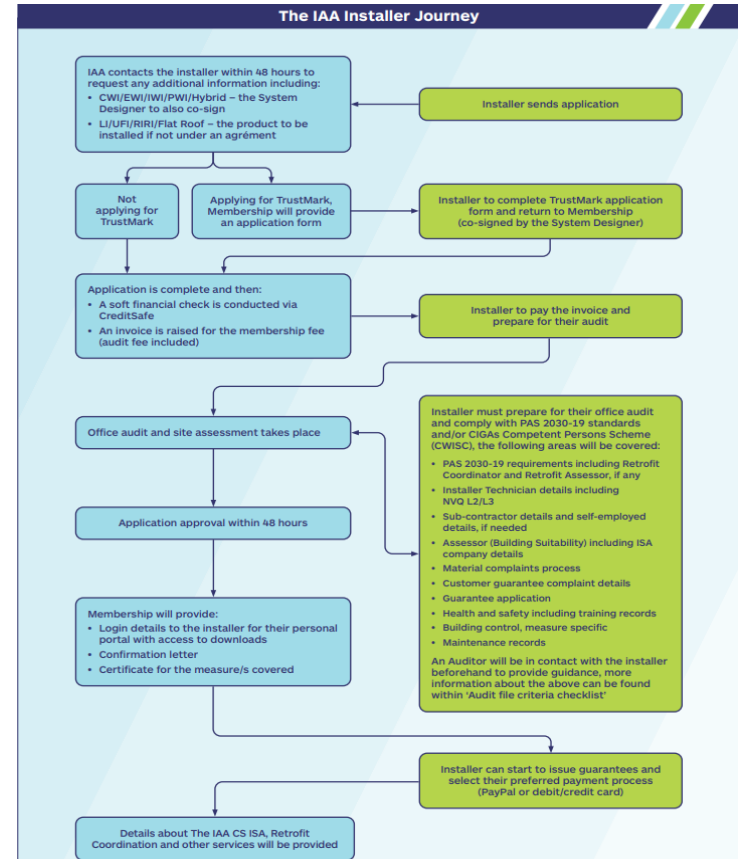
# Agenda

- Onboarding
- Membership Services
- PAS2030:2023
- TrustMark
- Insight into PAS2030:2023
- The Route to PAS2030 Certification

# IAA Membership

## How to become a member of The IAA in just 12 days!

- Complete application forms
- PL (£5M) & EL (£10M) insurance documents
- The IAA carries out due diligence to include finance checks
- Invoice raised for annual membership fee
- Application moved to audit



# IAA Member Benefits

## 'Right First Time'



# Available PAS & ATP Guarantees

The range of PAS compliant guarantees are available for both domestic retrofit and new build housing for the following measures:

- IWI - 25 years
- EWI - 25 years
- RIRI - 25 years
- UFI - 25 years
- FR – 6 years

The range of ATP guarantees are available for domestic retrofit, new build housing and commercial buildings for the following measures:

- IWI - 25 and 10 years
- EWI - 25 and 10 years
- RIRI - 25 and 10 years
- UFI - 25 and 10 years
- FR – 6 years



External Wall  
Insulation PAS  
25 years & ATP  
25 and 10 years



Internal Wall  
Insulation PAS  
25 years & ATP  
25 and 10 years



Room in Roof  
Insulation PAS 25  
years & ATP  
25 and 10 years



Underfloor  
Insulation PAS  
25 years & ATP  
25 and 10 years



Flat Roof  
PAS 6 years &  
ATP  
6 years

# How to apply



&



The TrustMark Scheme operates as an extension to IAA PAS Certification, so it is only available to companies that are also applying for/or are already registered to The IAA's PAS Certification Scheme.

Cover for all Energy Efficiency Measures when registered with The IAA as a TrustMark Scheme provider, meaning no need to go elsewhere.

You can apply in 3 easy steps.



Complete our application form and ask that your SD countersigns before returning to our membership department



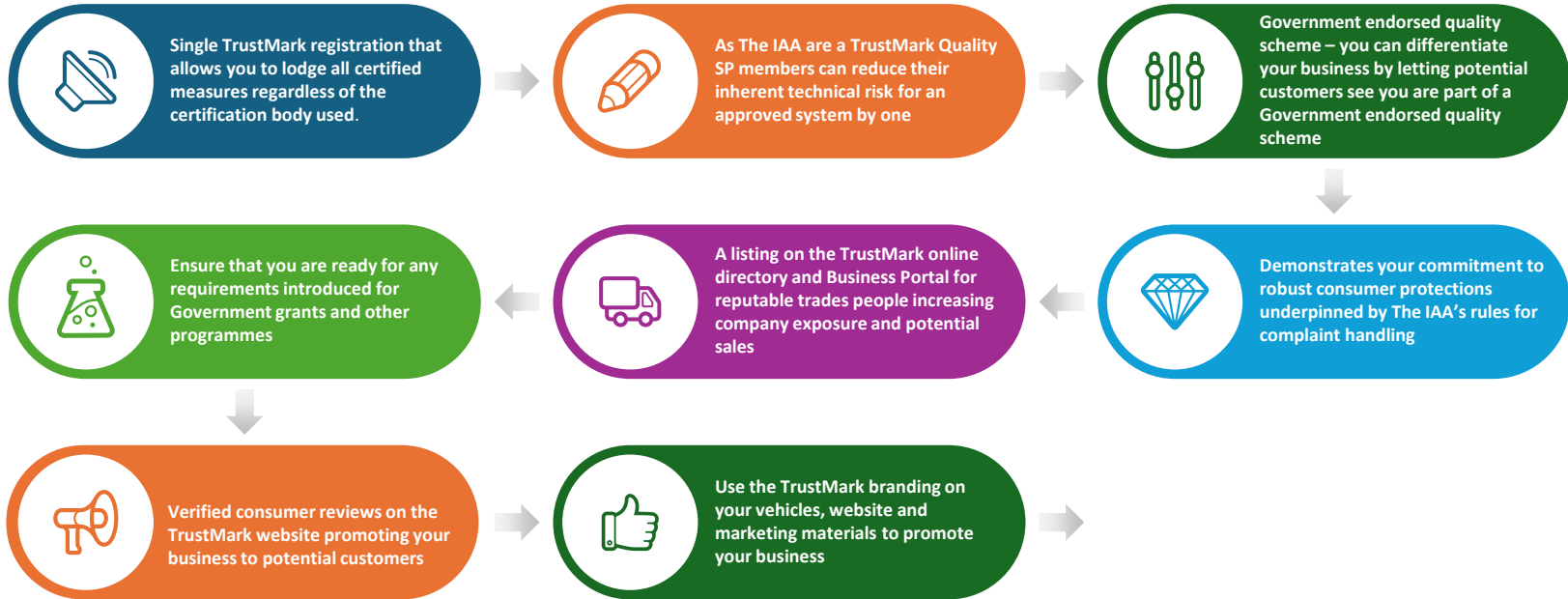
On completion of successful finance checks and receipt of payment for the annual fee an audit is scheduled



TrustMark Sub License agreement to be signed and IAA TM certificate to be issued



# Benefits of TrustMark Registration with The IAA



# Non-compliance notifications

## CAT1

This requires your urgent attention



## Failed Reinspection

TrustMark should advise why this inspection has failed which in turn will highlight what remedial work is required to ensure a PASS.



## Insufficient Engagement

It is important to ensure that your business communicates with TrustMark regarding any N/C's that you are notified of.



## Pending Remedy

Awaiting remedial works that will result in a PASS



# Final outcomes



Voiding of the individual lodgement within the data warehouse



Increased frequency / depth of audit

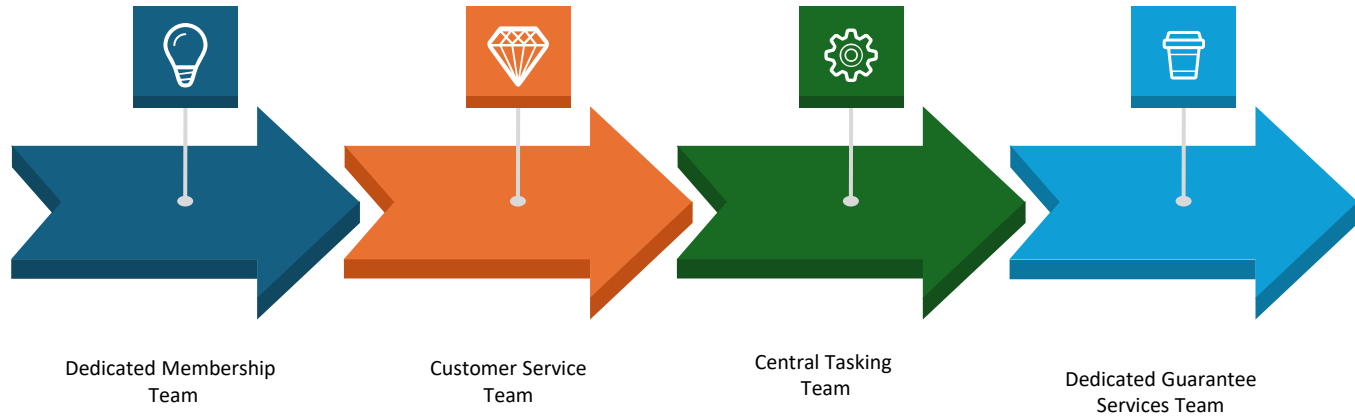


The application of bespoke conditions to the registration

Where a lodgement becomes voided TrustMark will report the outcome to Ofgem, who will act accordingly

TrustMark urges Scheme Providers to consider substantive action when their registered businesses have not demonstrated improvement from when TrustMark first raised concerns about the quality of workmanship.

# Summary





Accredited to ISO/IEC  
17065:2012 to provide product  
conformity certification

## PAS 2030 (publicly available specification)

PAS 2030 is a British Standards Institute (BSI) standard which sets out the requirements for installing, commissioning and handover of Energy Efficiency Measures (EEM's) in domestic retrofit projects. The primary objective of PAS is to assist installers to comply with its requirements for EEMs, providing installation specification for a measure specific Annex. Compliance with the PAS standard requires each installation to meet all of the requirements of PAS 2030.



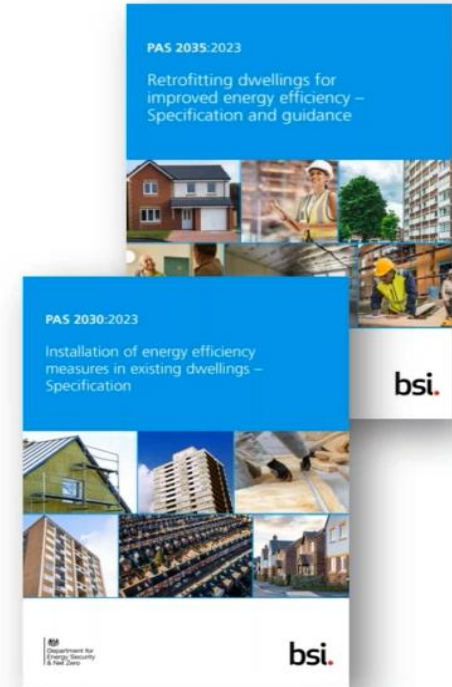


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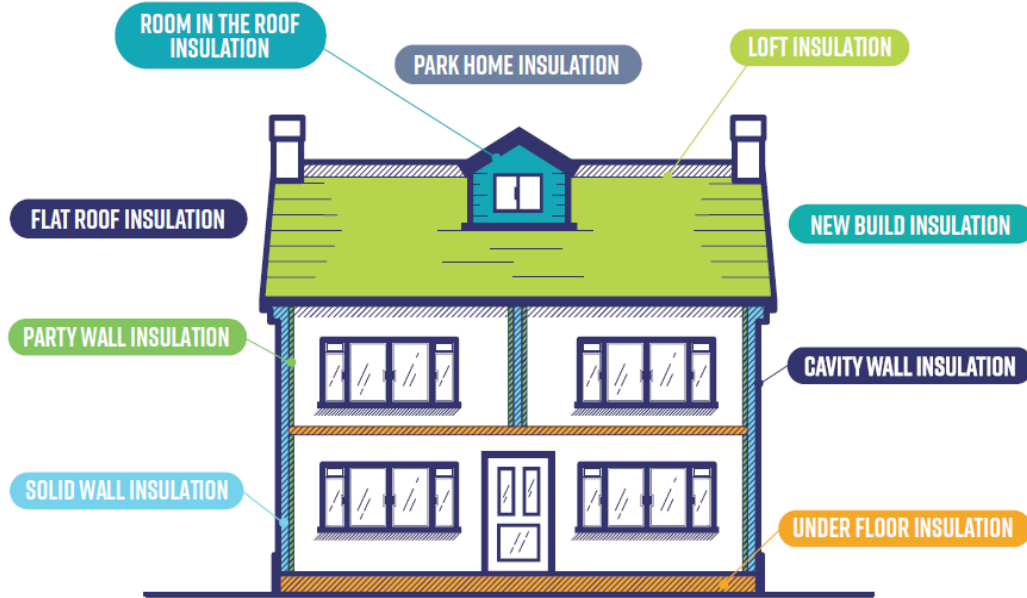
## PAS 2030 (publicly available specification)

It covers three primary types of installations:

- Building Fabric Measures (BFM) which include insulation, glazing, and doors.
- Building Services Mechanical (BSM) which include boilers and heating systems.
- Building Services Electrical (BSE) which includes lighting and lighting controls.



# The Route to PAS2030:2023



## Audit File Criteria Checklist

| Evidence for file – prior to audit   | Tick |
|--|------|
| Public and employer liability insurance certificates   |      |
| SBA/KIWA membership number and certificate (measure specific and where required)   |      |
| Green deal sub-sub license (measure specific and where required)   |      |
| PAS2030 certificate  |      |
| Evidence for file – for office audit   |      |
| <b>PAS2030-13 requirement - All measures</b> <ul style="list-style-type: none"> <li>Details of the Retrofit Coordinator (evidence required)</li> <li>Details of Retrofit Assessor (if any)</li> </ul>  |      |
| <b>Installer Technician details to include - All measures.</b> <ul style="list-style-type: none"> <li>Register of Installer Technicians</li> <li>Installer team visit records</li> <li>System Designer team visit reports (where applicable)</li> <li>Training records (NVQ L2/L3 obtained/working towards) and System Designer approval (where applicable)</li> </ul>   |      |
| <b>Sub-contractor/self-employed details (if any) - All measures</b> <ul style="list-style-type: none"> <li>Sub-contractor details</li> <li>SBA/KIWA registration details</li> <li>CIGA membership details</li> <li>Sub-contractor (NVQ L2/L3 obtained/working towards) and System Designer approval</li> <li>Installer company team visit inspection reports</li> <li>System Designer team visit inspection reports</li> <li>Assessor inspection reports (employed)</li> </ul> |      |
| <b>Assessors (building suitability) - All measures</b> <ul style="list-style-type: none"> <li>ISA company details or another recognised provider (ISCA)</li> <li>Assessment report - company and self-employed/sub-contractor reports</li> <li>Register of employed and self-employed Assessors</li> <li>Record of training/inspection</li> </ul>  |      |
| <b>Material complaints (if any) - All measures</b> <ul style="list-style-type: none"> <li>Nature of complaint, remedial action taken and sign off</li> </ul>   |      |
| <b>Customer guarantee complaint details - All measures</b> <ul style="list-style-type: none"> <li>Complaint records, remedial action taken and sign off</li> </ul>   |      |
| <b>Guarantee application - All measures.</b> <ul style="list-style-type: none"> <li>Guarantee application record system/file</li> </ul>  |      |
| <b>Health and safety - All measures</b> <ul style="list-style-type: none"> <li>Health and safety policy</li> <li>Health and safety manual</li> <li>Gas safety awareness training records</li> <li>Health and safety training records</li> <li>Equipment/PPE distribution list</li> </ul>   |      |
| <b>Building control (measure specific and where applicable) - All measures</b> <ul style="list-style-type: none"> <li>Building control details</li> <li>Record of application of building control application</li> </ul>   |      |
| <b>Maintenance - CW1 only</b> <ul style="list-style-type: none"> <li>Record of machine maintenance</li> </ul>  |      |

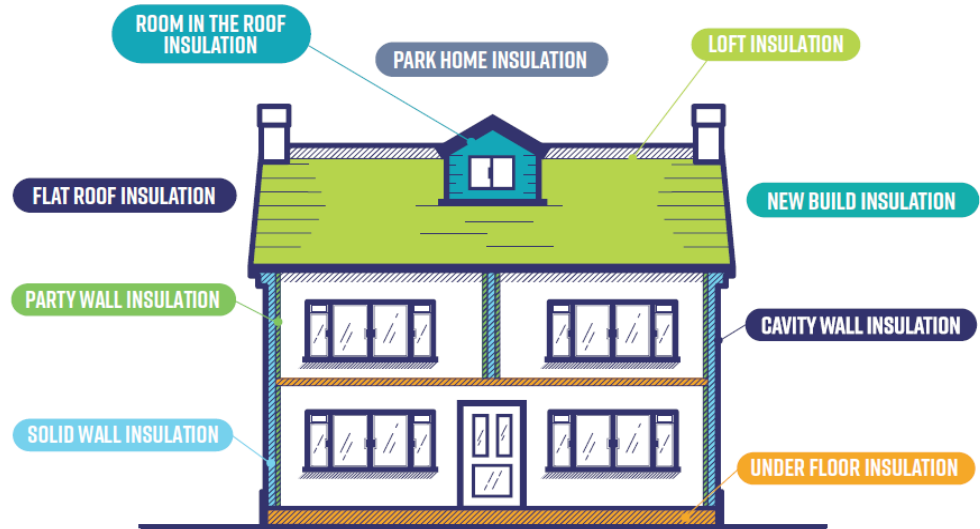


# Office Assessment for Insulation Measure

Office Audit will be against the PAS2030:2023 Standard.

‘Right First Time’

- BFM.1 Cavity Wall Insulation
- BFM 9.1&2 Loft Insulation
- BFM 12 Room In Roof
- BFM 6 Underfloor Insulation
- BFM 4.1&2 External wall Insulation
- BFM 8 Internal Wall Insulation
- BFM 7 Hybrid Wall Insulation
- BFM 13 Park Homes Insulation
- BFM 5 Flat Roof Insulation.
- BSM.5.1 Heating System Controls



## **Site Assessment for Insulation Measure**

Site Assessment will be against the PAS2030:2023 Standard.

Installation assessed to ensure compliance.

**Each Energy Efficiency Measure**



### **Compliant**

- Recommended for Certification
  - PAS2030:2023

### **Non-Compliant – Recommended actions**

- Improvement action notice
  - Supporting Evidence
  - Review process



# • IAA & IAA CS Member Benefits

- PAS2030 2023 Certification body and guarantee provider for fabric measures
- Microgeneration Certification Scheme & Guarantees
- IAA Guarantee Scheme
- Background Ventilation Assessor registration scheme
- CWISC
- Guarantee Search Facility
- Route to arbitration
- Training
- Design and evaluation
- Testing
- Remediation services
- ISA
- Nonstandard systems
- Card services



# PAS Awareness Course

Guidance on becoming PAS ready to fast track your business for certification

- Introduction to PAS
- Requirements for your business
- Resourcing your business
- Getting audit ready



# Any questions?



## Follow us



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company/installation-assurance-authority/

You can ask questions by typing them into the **questions** box of the control panel

## Panellists:

|                 |  |
|-----------------|--|
| Pilar Rodriguez | Green Heat Installer Engagement Programme Manager, <b>Energy Saving Trust</b>  |
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# energy saving trust

- **Email:**  
[GreenInstallerScotland@est.org.uk](mailto:GreenInstallerScotland@est.org.uk)
- **LinkedIn Group:**  
<https://www.linkedin.com/groups/5139242/>
- **Email updates and quarterly newsletter subscription:**  
[bit.ly/2PSatkl](https://bit.ly/2PSatkl)
- **Website:**  
<https://energysavingtrust.org.uk/business/energy-efficiency/green-installer/>
- **Heat pump and insulation installer toolkits:**  
<https://greenheattoolkit.energysavingtrust.org.uk/>







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