

# PAS 2030:2023

## Installation of energy efficiency measures in existing dwellings – Specification



Department for  
Energy Security  
& Net Zero

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# Contents

|   |           |   |           |
|---|-----------|---|-----------|
| Foreword .....  | iii       | <b>7 Installation process management.....</b>                     | <b>15</b> |
| Introduction.....   | v         | 7.1 Operation and process oversight .....                         | 15        |
| <b>1 Scope.....</b>   | <b>1</b>  | 7.2 Pre-installation building inspection .....                    | 15        |
| <b>2 Normative references .....</b>                               | <b>2</b>  | 7.4 Installation change.....                                      | 16        |
| Standards publications.....                                       | 2         | 7.5 Process continuity plan .....                                 | 16        |
| Other publications .....  | 4         | 7.6 Process control.....  | 17        |
| <b>3 Terms and definitions .....</b>                              | <b>5</b>  | 7.7 Internal audit and corrective action .....                    | 17        |
| 3.1 client .....  | 5         | 7.8 Installation process records.....                             | 17        |
| 3.2 commissioning.....  | 5         | 7.9 Business and financial probity.....                           | 17        |
| 3.3 dwelling.....   | 5         | <b>8 Service provision.....</b>                                   | <b>18</b> |
| 3.4 EAS compliance .....  | 5         | 8.1 Complaints procedure.....                                     | 18        |
| 3.5 EEM product .....   | 5         | 8.2 Complaints records.....                                       | 18        |
| 3.6 EEM proprietary system .....                                  | 5         | 8.3 Interaction with clients.....                                 | 18        |
| 3.7 energy efficiency measure (EEM) .....                         | 5         | <b>9 Claims of compliance .....</b>                               | <b>19</b> |
| 3.8 installation.....   | 5         | 9.1 Applicability of claims.....                                  | 19        |
| 3.9 installation location .....                                   | 5         | 9.2 Requirement to claim .....                                    | 19        |
| 3.10 installation method.....                                     | 5         | 9.3 Basis of claim .....  | 19        |
| 3.11 installation method statement.....                           | 5         | <b>10 Documents essential to the application of the</b>           |           |
| 3.12 Main Contractor .....  | 5         | <b>Annexes of this PAS.....</b>                                   | <b>20</b> |
| 3.13 operative.....   | 6         | 10.1 Use of the identified documents.....                         | 20        |
| 3.14 operative (experienced).....                                 | 6         | 10.2 Publicly Available Specification and British Standards ..... | 20        |
| 3.15 operative (new entrant) .....                                | 6         | 10.3 Institution of Gas Engineer and Managers – Standards ..      | 21        |
| 3.16 personal certificate of competence .....                     | 6         | 10.4 Energy Networks Association Engineering                      |           |
| 3.17 pre-installation building inspection.....                    | 6         | Recommendations.....  | 22        |
| 3.18 Recognition of Prior Experience and Learning (RPEL) .....    | 6         | 10.5 UKLPG .....  | 22        |
| 3.19 Register of Regulated Qualifications (RRQ) .....             | 6         | 10.6 Ministry of Housing, Communities and Local Government..      | 22        |
| 3.20 retrofit assessment .....                                    | 6         | 10.7 Other insulation installation guidance references.....       | 22        |
| 3.21 Retrofit Assessor.....                                       | 6         | <b>Annex A (informative)</b>                                      |           |
| 3.22 Retrofit Coordinator .....                                   | 7         | <b>Measure-specific annex selection and co-installation</b>       |           |
| 3.23 retrofit design .....  | 7         | <b>requirements .....</b>   | <b>23</b> |
| 3.24 Retrofit Designer.....                                       | 7         | A.1 Introduction .....  | 23        |
| 3.25 Retrofit Installer .....                                     | 7         | A.2 Efficiency measures and types arranged by measure             |           |
| 3.26 supervision.....   | 7         | category.....   | 23        |
| 3.27 vocational competence.....                                   | 7         | A.3 Explanation of PAS 2030 measure-specific annex                |           |
| 3.28 vocational competence (acquiring).....                       | 7         | referencing system .....  | 25        |
| 3.29 vocational competence ratio.....                             | 7         | A.4 Interactions between EEMs.....                                | 25        |
| 3.30 vocational qualification .....                               | 7         | A.5 Avoidance of thermal bridging and infiltration.....           | 27        |
| 3.31 vocational qualification currency.....                       | 7         | <b>Annex B (normative)</b>  |           |
| <b>4 Retrofit project management.....</b>                         | <b>8</b>  | <b>BFM energy efficiency measures .....</b>                       | <b>28</b> |
| <b>5 The retrofit design .....</b>                                | <b>9</b>  | B.1 Measure BFM.1 – Cavity wall insulation including that         |           |
| 5.1 Retrofit Installer responsibility to be in possession of a    |           | installed in party walls.....                                     | 28        |
| retrofit design .....   | 9         | B.2 Measure BFM.2 – Draught proofing .....                        | 31        |
| 5.2 Validation of the retrofit design .....                       | 9         | B.3 Measure BFM.3 – Energy efficient glazing and doors            |           |
| <b>6 Installation process .....</b>                               | <b>11</b> | including replacement Insulating Glass Units (IGU).....           | 33        |
| 6.1 Installation method statement.....                            | 11        | B.4 Measure BFM.4 – External wall insulation .....                | 35        |
| 6.2 Installation equipment and tools.....                         | 11        | B.5 Measure BFM.5 – Flat roof insulation.....                     | 41        |
| 6.3 Checking, handling and storage of materials and supplies..... | 12        | B.6 Measure BFM.6 – Floor insulation.....                         | 44        |
| 6.4 Provision of installation instructions to operatives.....     | 12        | B.7 Measure BFM.7 – Hybrid wall insulation .....                  | 47        |
| 6.5 People .....  | 12        | B.8 Measure BFM.8 – Internal wall insulation .....                | 52        |
| 6.6 Subcontract Installers.....                                   | 13        | B.9 Measure BFM.9 – Loft insulation .....                         | 57        |
| 6.7 Testing.....  | 13        | B.10 Measure BFM.10 – Pitched roof insulation.....                | 60        |
| 6.8 Commissioning .....   | 13        | B.11 BFM.11 – Solar blinds, shutters and shading devices          |           |
| 6.9 Handover .....  | 14        | (internal and external).....                                      | 63        |
| 6.10 Installation control.....                                    | 14        | B.12 BFM.12 – Room-in-roof insulation .....                       | 66        |
| 6.11 Installation documents and record keeping.....               | 14        | B.13 BFM.13: Insulation of existing park homes .....              | 68        |

**Annex C (normative)**

**BSM energy efficiency measures ..... 70**

C.1 Measure BSM.1 – Condensing boilers, natural gas-fired and liquefied petroleum gas-fired ..... 70

C.2 Measure BSM.2 – Oil-fired condensing boilers ..... 73

C.3 Measure BSM.3 – Flue-gas heat recovery devices ..... 76

C.4 Measure BSM.4: Heating system insulation (ducting, pipes and cylinders) ..... 78

C.5 Measure BSM.5 – Heating, hot water system, air conditioning or ventilation controls and components ..... 80

C.6 Measure BSM.6 – Hot water systems ..... 83

C.7 Measure BSM.8 – Mechanical ventilation with heat recovery ..... 86

C.8 Measure BSM.8 – Under-floor heating ..... 89

C.9 Measure BSM.9 – Warm-air heating systems ..... 92

C.10 Measure BSM.10 Water efficient taps and showers ..... 95

**Annex D (normative)**

**BSE energy efficiency measures ..... 97**

D.1 Measure BSE.1 – Electric storage heaters (including electric warm-air heating units that incorporate heat storage) ..... 97

D.2 Measure BSE.2 Lighting fittings, lighting systems and lighting system controls ..... 100

**Annex E (informative)**

**PAS 2030:2017 to PAS 2030:2019 – Substantive changes ..... 102**

**Annex F (informative)**

**Retrofit Installer guidance on the use and application of PAS 2030 ..... 105**

F.1 Overview ..... 105

F.2 A staged approach to installation ..... 105

**Annex G (informative)**

**Example installation project information collation form ..... 107**

G.1 Use of this form ..... 107

PAS 2030 Installation Process Record ..... 107

G.2 Location of installation ..... 107

G.3 Measure(s) to be installed ..... 107

G.4 Source of PAS 2035 compliant design (5.1) ..... 108

G.5 Validation of design (5.2) ..... 108

G.6 Products and/or system specified/to be installed ..... 109

G.7 Installation method statement ..... 109

G.8 Installation process ..... 110

G.9 Operation and process oversight ..... 113

G.10 Pre-installation building inspection ..... 113

G.11 Provision for any intermediate inspection required (7.3) ..... 115

G.12 Installation change (7.4) ..... 115

G.13 Process continuity (7.5) ..... 115

G.14 Process control records (7.6 & 7.8) ..... 115

G.15 Details of any problems encountered during installation, corrections agreed and remedial work undertaken ..... 116

G.16 Client complaints (8) ..... 116

G.17 Commissioning – EEM performance testing carried out ..... 117

G.18 Record of information left with client at handover ..... 117

G.19 Installation sign-off ..... 117

**Bibliography ..... 118**

Standards publications ..... 118

Other publications ..... 118

**List of tables**

Table A.1 – Category BFM (Building Fabric Measures) ..... 23

Table A.2 – Category BSM (Building Services Mechanical) ..... 24

Table A.3 – Category BSE (Building Services Electrical) ..... 25

Table B.1 – Measure-specific requirements for cavity wall insulation (BFM.1) ..... 28

Table B.2 – Measure-specific requirements for draught proofing (BFM.2) ..... 31

Table B.3 – Measure-specific requirements for energy efficient glazing and doors (BFM.3) ..... 33

Table B.4 – Measure-specific requirements for external wall insulation (BFM.4) ..... 35

Table B.5 – Measure-specific requirements for flat roof insulation (BFM.5) ..... 41

Table B.6 – Measure-specific requirements for floor insulation (BFM.6) ..... 44

Table B.7 – Measure-specific requirements for hybrid wall insulation (BFM.7) ..... 47

Table B.8 – Measure-specific requirements for internal wall insulation (BFM.8) ..... 52

Table B.9 – Measure-specific requirements for loft insulation (BFM.9) ..... 57

Table B.10 – Measure-specific requirements for pitched roof insulation (BFM.10) ..... 60

Table B.11 – Solar blinds, shutters and shading devices (BFM.11) ..... 63

Table B.12 – Room-in-roof insulation (BFM.12) ..... 66

Table B.13 – Insulation of existing park homes (BFM.13) ..... 68

Table C.1 – Measure-specific requirements for gas-fired condensing boilers (BSM.1) ..... 70

Table C.2 – Measure-specific requirements for oil-fired condensing boilers (BSM.2) ..... 73

Table C.3 – Measure-specific requirements for Flue-gas recovery devices (BSM.3) ..... 76

Table C.4 – Measure-specific requirements for heating system insulation (including ducting, pipes and cylinders) (BSM.4) ..... 78

Table C.5 – Measure-specific requirements for heating, hot water system, air conditioning or ventilation controls and components (BSM.5) ..... 80

Table C.6 – Measure-specific requirements for hot water systems (BSM.6) ..... 83

Table C.7 – Measure-specific requirements for mechanical ventilation with heat recovery (BSM.7) ..... 86

Table C.8 – Measure-specific requirements for under-floor heating (BSM.8) ..... 89

Table C.9 – Measure-specific requirements for gas and/or oil-fired warm-air heating systems (domestic and non-domestic) (BSM.9) ..... 92

Table C.10 – Measure-specific requirements for water efficient taps and showers (BSM.10) ..... 95

Table D.1 – Measure-specific requirements for electric storage heaters (BSE.1) ..... 97

Table D.2 – Measure-specific requirements for lighting fittings, lighting systems and lighting system controls (BSE.2) ..... 100

Table E.1 – Substantive changes introduced in PAS 2030:2019 ..... 102

**List of figures**

Figure 1 – EEM installation and validation system – Overview, indicating the relevant specifications and their areas of application .....vi

Figure A.1 – PAS 2030 and PAS 2035:2023 The Measures Interaction Matrix (Version G, 11 November 2018) ..... 26

# Foreword

## Publishing information

This PAS was sponsored by The Department for Energy Security and Net Zero (DESNZ). Its development was facilitated by BSI Standards Limited and it was published under licence from The British Standards Institution. It will come into effect on 30 March 2025.

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## Supersession

PAS 2030:2023 supersedes PAS 2030:2019+A1:2022 which remains current and will be withdrawn on 30 March 2025.

## Information about this document

This is a full revision of the document and introduces the following principal changes.

- PAS 2035 guidance clauses have been updated to:
  - a) reflect national policy; and
  - b) emphasise the role of PAS 2035 in protecting the consumer.
- Clauses have been included to facilitate scale retrofit by allowing retrofit design to commence based on assessments of archetypes.
- The BEIS retrofit technical guides have been included as references.
- The risk assessment process has been simplified to avoid unintended complexities.
- Reflecting the change of emphasis from measures-based retrofit to whole dwelling retrofit by including more reference to a Main Contractor.
- Clarification of the role of the Retrofit Coordinator, including site visits and recording of non-compliance.
- Contents of a Medium Term Improvement Plan is now a requirement rather than guidance.
- Requirements to produce an airtightness strategy for projects, which may include setting of an airtightness target and air leakage testing.
- Clarification of what happens in the PAS 2035 process if historic significance is identified. A new Annex E is included.

- Annex C has been simplified where possible and brought in line with the new Approved Document F.
- Further monitoring and evaluation references the new BS 40101 standard for Building Performance Evaluation, and Monitoring and Evaluation is now considered from inception through to completion.
- A process has been included whereby distressed replacement of heating appliances can retrospectively comply with PAS 2035.
- The guidance and requirements for climate resilience and adaptation in retrofit has been strengthened.
- The requirements and qualifications for independent inspection of the pre-installation building inspection (PIBI) some PAS 2030 Annexes has been strengthened.
- Requirements and guidance around moisture in buildings has been brought in line with language in BS 5250.

This publication can be withdrawn, revised, partially superseded or superseded. Information regarding the status of this publication can be found in the Standards Catalogue on the BSI website at [bsigroup.com/standards](https://www.bsigroup.com/standards), or by contacting the Customer Services team.

PAS 2030:2023 is published with the expectation that installers intending to claim compliance with it, will commence adoption of its provisions immediately following publication with a view to fully meeting its requirements and claiming compliance with PAS 2030:2023 and therefore also PAS 2035:2023, by 30 March 2025. During this period, PAS 2030:2019+A1:2022 will remain available for use where required but will be withdrawn on 30 March 2025.

Where websites and webpages have been cited, they are provided for ease of reference and are correct at the time of publication. The location of a webpage or website, or its contents, cannot be guaranteed.

## Relationship with other publications

PAS 2035:2023 is intended to be read and used in conjunction with PAS 2030:2023.

## Presentational conventions

The provisions of this document are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is "shall".

*Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.*

Where words have alternative spellings, the preferred spelling of the *Shorter Oxford English Dictionary* is used (e.g. "organization" rather than "organisation").

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**Compliance with a PAS cannot confer immunity from legal obligations.**

# Introduction

PAS 2030 continues to provide a specification for the installation of energy efficiency measures (EEM) in existing dwellings. This is in response to market changes that have altered the context in which it is applied and to align with the parallel introduction of PAS 2035, which is applicable only to dwellings. As a result, this PAS is no longer applicable to buildings used for purposes other than dwellings.

Although this PAS was originally developed with support for the United Kingdom Green Deal Financing Mechanism as a primary objective, it has always been appropriate for application in respect of any EEM installation, irrespective of how that installation is to be funded.

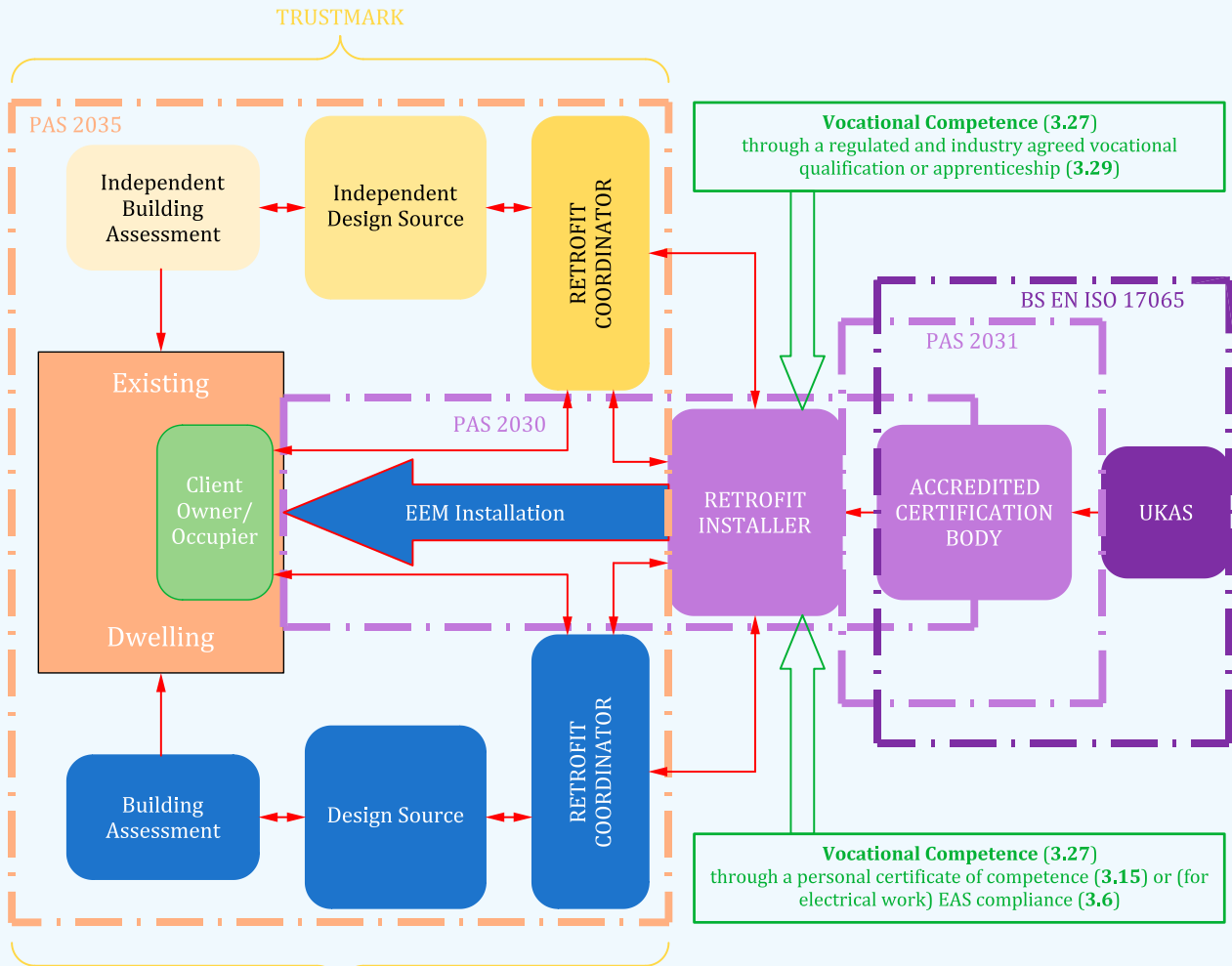
Attention is drawn to the fact that this PAS does not set out a specification for the design of EEM or for the assessment of dwellings undertaken to inform such designs – those topics are covered by PAS 2035. It does, however, set out critical aspects of retrofit design that Retrofit Installers expect to find addressed in the designs they work to and without which they should not commence installation.

The primary objective for the PAS remains the provision of a robust, uniformly applicable EEM installation process that can assist Retrofit Installers that comply with its requirements in full to demonstrate that their installation processes are capable of providing installation to specification and in accordance with the Client's expectations. Figure 1 shows how this PAS interacts with PAS 2035 and other standards for the installation and validation of EEMs.

Each of the energy efficiency measures covered by this PAS is provided for in a measure-specific annex. Compliance with this PAS requires that for each installation, the Retrofit Installer has to meet all the normative requirements of Clause 4 to Clause 9 of PAS 2030 together with those set out in the annex relevant to each measure to be installed.

This PAS specifies claims of compliance to be in respect of the core requirements and all annexes relevant to the installation undertaken by the claiming entity. The entity also identifies whether the claim is on the basis of self-assessment, other party assessment or independent third-party validation and to differentiate between installation undertaken on the basis of a Retrofit Installer provided retrofit design and that undertaken in accordance with a retrofit design provided by an independent third party.

**Figure 1 – EEM installation and validation system – Overview, indicating the relevant specifications and their areas of application**





# 1 Scope

This PAS specifies requirements for the installation of energy efficiency measures (EEM) in existing dwellings (not new build). It no longer covers buildings used for non-dwelling purposes. It is intended for use by any entity undertaking the installation of any products and/or systems designed to improve the energy efficiency of such dwellings in accordance with PAS 2035:2023.

As with previous editions, this PAS includes requirements in respect of installation processes, process management and service provision and includes criteria relating to installation methods, equipment, tools, product or system and material suitability, the commissioning of installed measures and the training, skills and vocational qualification of the people undertaking such installation. The PAS includes information provided to assist Retrofit Installers to fulfil their responsibility to ensure the effective co-functioning of EEM installed in the same dwelling.

This PAS consists of core requirements to be met by any entity claiming compliance with it, and normative measure-specific annexes setting out supplementary requirements for each included measure type.

Claims of compliance with this PAS will be in respect of the processes and procedures employed and their application in the installation of EEM in any given dwelling. Such claims do not reflect the quality or performance of the retrofit design, which will be the subject of claims of compliance with PAS 2035:2023.

Annex A provides detail of the PAS 2030 measure-specific annex structure and its relationship to the list of specified measures and includes information to assist Retrofit Installers to fulfil their responsibility for verifying the correct functional relationship between EEM installed in the same dwelling.

Annex B, Annex C and Annex D provide specific requirements relating to particular energy efficiency measures, or groups of measures, for application by Retrofit Installers undertaking installation of those measures. These annexes also include additional requirements in respect of the provision of information to clients.

Annex E identifies the points of substantive change between PAS 2030:2017 and PAS 2030:2019.

Annex F sets out guidance on the use and application of PAS 2030.

Annex G provides an example installation project information collation form that can be copied and used by Retrofit Installers to assist demonstration of their compliance with this PAS.

This PAS does not include requirements relating to the certification of PAS 2030 compliance by independent third parties, which is covered by PAS 2031.

***NOTE** Those undertaking the roles within this PAS might also have duties to comply with under the requirements of health and safety legislation. The installation of energy efficiency measures (EEM) in existing dwellings is construction work as defined in the Construction (Design and Management) Regulations 2015 [1]. Attention is also drawn to the Health and Safety at Work etc. Act 1974 [2] and other health and safety regulations. See <https://www.hse.gov.uk/construction/> for more information.*

## 2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes provisions, or limits the application, of this document<sup>1)</sup>. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

**NOTE** This PAS requires users to select measure-specific normative Annexes depending on the type of installation being undertaken. Clause 10 lists all documents that are considered indispensable for the application of particular Annexes.

### Standards publications

BS 3632:2015, *Residential park homes – Specification*

BS 5410-1, *Code of practice for oil firing – Part 1: Installations up to 45 kW output capacity for space heating and hot water supply purposes*

BS 5410-2, *Code of practice for oil firing – Part 2: Installations of 45 kW and above output capacity for space heating, hot water and steam supply service*

BS 5440-1, *Flueing and ventilation for gas appliances of rated input not exceeding 70 kW net (1st, 2nd and 3rd family gases) – Part 1: Specification for installation of gas appliances to chimneys and for maintenance of chimneys*

BS 5440-2, *Flueing and ventilation for gas appliances of rated input not exceeding 70 kW net (1st, 2nd and 3rd family gases) – Part 2: Specification for the installation and maintenance of ventilation provision for gas appliances*

BS 5482-1, *Code of practice for domestic butane and propane gas burning installations – Part 1: Permanent dwellings*

BS 5864, *Installation and maintenance of gas-fired ducted air heaters of rated heat input not exceeding 70 kW net (2nd and 3rd family gases) – Specification*

BS 5970, *Code of practice for thermal insulation of pipework and equipment in the temperature range of –100 °C to +870°C*

BS 6100-1, *Building and civil engineering – Vocabulary – Part 1: General terms*

BS 6262-2, *Glazing for buildings – Part 2: Code of practice for energy light and sound*

BS 6262-3, *Glazing for buildings – Part 3: Code of practice for fire security and wind loading*

BS 6262-4, *Glazing for buildings – Part 4: Code of practice for safety related to human impact*

BS 6262-6, *Glazing for buildings – Part 6: Code of practice for special applications*

BS 6262-7, *Glazing for buildings – Part 7: Code of practice for the provision of information*

BS 6644, *Specification for installation of gas fired boilers of rated inputs between 70 kW (net) and 1.8 MW (net) (2nd and 3rd family gases)*

BS 6798, *Specification for installation and maintenance of gas-fired boilers of rated input not exceeding 70 kW net*

BS 6891, *Installation of low pressure gas pipework of up to 35 mm (R1 1/4) in domestic premises (2nd family gas) – Specification*

BS 7386, *Draught-strips for the draught control of existing doors and windows in housing (including test methods)*

BS 7593, *Code of practice for treatment of water in domestic hot water central heating systems*

BS 7619, *Specification for extruded cellular unplasticized PVC (PVCU) profiles*

BS 7671, *Requirements for Electrical Installations – IET Wiring Regulations*

<sup>1)</sup> Documents that are referred to solely in an informative manner are listed in the Bibliography.

- BS 7880, *Draught control of existing doors and windows in housing using draught strips*
- BS 8000-0, *Workmanship on building sites – Part 0: Introduction and general principles*
- BS 8000-7, *Workmanship on building sites – Part 7: Code of practice for glazing*
- BS 8213-4, *Code of practice for the survey and installation of windows and external door sets*
- BS 81234, *Windows and doors – Code of practice for the survey and installation of windows and external door sets*
- BS 8558, *Guide to the design, installation, testing and maintenance of services supplying water for domestic use within buildings*
- BS 8660-1, *Gas-fired micro-cogeneration appliances of rated thermal input not exceeding 70 kW net – Part 1: Specification for selection, installation, inspection, commissioning, servicing and maintenance of Stirling engine micro-cogeneration appliances*
- BS EN 378-1, *Refrigerating systems and heat pumps – Safety and environmental requirements – Basic requirements, definitions, classification and selection criteria*
- BS EN 378-3, *Refrigerating systems and heat pumps – Safety and environmental requirements – Installation location and personal protection*
- BS EN 378-4, *Refrigerating systems and heat pumps – Safety and environmental requirements – Operation, maintenance, repair and recovery*
- BS EN 806-1, *Specifications for installations inside buildings conveying water for human consumption – General*
- BS EN 806-4, *Specifications for installations inside buildings conveying water for human consumption – Installation*
- BS EN 806-5, *Specifications for installations inside buildings conveying water for human consumption – Operation and maintenance*
- BS EN 1264-1, *Water based surface embedded heating and cooling systems – Part 1: Definitions and symbols*
- BS EN 1264-2, *Water based surface embedded heating and cooling systems – Part 2: Floor heating: Prove methods for the determination of the thermal output using calculation and test methods*
- BS EN 1264-3, *Water based surface embedded heating and cooling systems – Part 3: Dimensioning*
- BS EN 1264-4, *Water based surface embedded heating and cooling systems – Part 4: Installation*
- BS EN 1264-5, *Water based surface embedded heating and cooling systems – Part 5: Heating and cooling surfaces embedded in floors – Determination of the thermal output*
- BS EN 1670, *Building hardware – Corrosion resistance – Requirements and test methods*
- BS EN 12828, *Heating systems in buildings – Design for water-based heating systems*
- BS EN 12831, *Heating systems in buildings: Method for calculation of the design heat load*
- BS EN 13120, *Internal blinds – Performance requirements including safety*
- BS EN 13561, *External blinds and awnings – Performance requirements including safety*
- BS EN 13659, *Shutters and external venetian blinds – Performance requirements including safety*
- BS EN 14336, *Heating systems in buildings – Installation and commissioning of water based heating systems*
- BS EN 15316-4-8, *Heating systems in buildings – Method for calculation of system energy requirements and system efficiencies – Space heating generation systems, air heating and overhead radiant heating systems*
- BS EN 16484-1, *Building automation and control systems (BACS) – Project specification and implementation*
- BS EN 16883, *Conservation of cultural heritage – Guidelines for improving the energy performance of historic buildings*
- BS EN 62446-1, *Photovoltaic (PV) systems – Requirements for testing, documentation and maintenance – Grid connected systems – Documentation, commissioning tests and inspection*
- BS EN ISO 11600, *Building construction – Jointing products – Classification and requirements for sealants*
- G59/3, *Distributed Generation Connection Guide – A guide for connecting generation that falls under G59/3 to the distribution network*

G83/1-1, *Stage 1: Distributed Generation Connection Guide – A guide for connecting generation that falls under G83/1-1 STAGE 1 to the distribution network*

G83/2-1, *Stage 2: Distributed Generation Connection Guide – A guide for connecting generation that falls under G83/1-1 STAGE 2 to the distribution network*

IGEM UP/1, *Strength testing, tightness testing and direct purging of industrial and commercial gas installations*

IGEM UP/1A, *Strength/tightness testing/purging of small, low pressure industrial and commercial installations*

IGEM UP/1B, *Tightness testing and direct purging of small Liquefied Petroleum Gas/Air, NG and LPG installations*

IGEM/UP/2, *Installation of pipework on industrial and commercial premises*

IGEM/UP/7, *Gas installations in timber framed and light steel framed buildings*

PAS 2031, *Certification of energy efficiency measure installation in existing buildings and insulation in residential park homes*

PAS 2035:2023, *Retrofitting dwellings for improved energy efficiency – Specification and guidance*

UKLPG, *Code of practice 22 – Design, installation and testing of LPG piping systems*

## Other publications

[N1] HM GOVERNMENT. *The Domestic Building Services Compliance Guide*, London: 2018.

[N2] *External Wall Insulation Specification for Weathering and Thermal Bridge Control*.<sup>2)</sup>

[N3] *External Wall Insulation Pre-Installation Building Inspection Checklist*

[N4] *EWI Building Owner Maintenance Pack/Schedule*

[N5] DEPARTMENT FOR BUSINESS, ENERGY & INDUSTRIAL STRATEGY. *Retrofit Room in Roof Insulation Guide to Best Practice*. Jan 2022.<sup>3)</sup>

[N6] CONSTRUCTION INDUSTRY TRAINING BOARD. *General requirements and guidance for the installation of cold roof loft insulation (Version 2)*.<sup>4)</sup>

<sup>2)</sup> Available at <https://www.inca-ltd.org.uk/wp-content/uploads/2019/09/External-wall-insulation-specification-for-weathering-and-thermal-bridge....pdf>

<sup>3)</sup> Available at [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1045178/retrofit-room-in-roof-insulation-best-practice.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1045178/retrofit-room-in-roof-insulation-best-practice.pdf)

<sup>4)</sup> Available at: <https://qms.easy-greendeal.com/images/external/EX20%20-%20General%20Requirements%20and%20Guidance%20for%20Loft%20Insulation%20September%202013.pdf>

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 3.1 client

property owner, householder, landlord and/or tenant of a dwelling that is subject to retrofit, sometimes also including the funding body

**NOTE 1** *In this PAS, the term client refers to the recipient of a domestic retrofit project.*

**NOTE 2** *There might be more than one client to consider as part of this PAS process.*

### 3.2 commissioning

activities where an installed measure operates within the boundaries and conditions of the design specification

### 3.3 dwelling

self-contained unit of accommodation

**NOTE** *Examples of a dwelling include a house or flat or park home used by one household as a home.*

### 3.4 EAS compliance

holding a certificate of compliance with the EAS for the category of work relevant to the EEM to be installed

**NOTE 1** *The certificate is issued by a certification body in accordance with the requirements of BS EN ISO/IEC 17065, or being registered as an Approved Certifier of Construction as defined in EAS Appendix 7 (Particular requirements for Scottish Building Standards) [3].*

**NOTE 2** *EAS is Electrotechnical Assessment Specification for use by Certification and Registration Bodies [3].*

### 3.5 EEM product

item intended for installation in existing dwellings for the purpose of enhancing the energy efficiency of those buildings, that is not made available as an EEM system

### 3.6 EEM proprietary system

combination of particular products and materials together with any related installation method, design detailing, equipment requirements and performance objectives, placed on the market exclusively by a specific supplier, for installation in existing dwellings for the purpose of enhancing the energy efficiency of those dwellings

### 3.7 energy efficiency measure (EEM)

planned work undertaken to improve the energy performance of a dwelling by saving or generating energy

### 3.8 installation

location, placement and/or fixing of an energy efficiency measure in, or connected to, an existing dwelling excluding any related work to enable the installation of the measure

### 3.9 installation location

dwelling or group of dwellings that are the subject of EEM installation(s) under the supervision of a single, designated, competent person

### 3.10 installation method

sequence of actions to be undertaken in installing one or more EEM products or systems in accordance with their particular specification, in a safe manner at a particular dwelling

### 3.11 installation method statement

precise description of the installation method

**NOTE** *An installation method statement can be a single document prepared specifically for this purpose or could consist of a collection of documents, in the sequence of required application, contributing to the complete definition of the intended method.*

### 3.12 Main Contractor

lead organization managing the retrofit delivery of EEMs to dwelling(s) or project(s), typically on multi-EEM or large-scale retrofits

### 3.13 operative

person employed by the Retrofit Installer, either directly or under a subcontract arrangement, to undertake installation tasks on an energy efficiency measure in accordance with the relevant method statement

**NOTE 1** There are two categories of operative permitted under the provisions of this PAS; those who can demonstrate vocational competence (see 3.27) and those who are acquiring vocational competence.

**NOTE 2** Individuals employed to provide labouring, carrying or loading/unloading capability do not constitute operatives in the terms of this PAS.

### 3.14 operative (experienced)

operative who has been installing EEM relevant to the occupation in which they operate, prior to the requirements for a vocational qualification included in this PAS for new entrants

**NOTE** This term is not used in this PAS other than as part of the definition of personal certificate of competence (see 3.16).

### 3.15 operative (new entrant)

operative who is new to installing an EEM and who can therefore only demonstrate vocational competence by (acquiring) vocational competence (see 3.28)

### 3.16 personal certificate of competence

certificate, issued by a certification body, to an experienced operative who meets the certification scheme's competence criteria or as a means of on-going assessment for ensuring continues competence of an individual following the award for a vocational qualification.

**NOTE 1** See 3.14 for definition of experienced operative.

**NOTE 2** Certificates of competence may not be issued to new entrants (3.15) other than as a means of on-going assessment of individual competence following the award of a vocational qualification.

**NOTE 3** The period for re-confirming competence following a vocational qualification should be set by the industry sector.

**NOTE 4** The certificate is issued by the certification body in accordance with the requirements of BS EN ISO/IEC 17024.

### 3.17 pre-installation building inspection

inspection of an installation location (see 3.9) undertaken by or on behalf of the Retrofit Installer prior to commencement of installation

**NOTE 1** The inspection confirms that the retrofit design provided is complete, conforms to this PAS, can be fulfilled at the location specified and that the proposed installation does not result in noncompliance with statutory requirements and/or generally accepted industry good practice

**NOTE 2** The application of this inspection to particular measures is addressed through the pre-installation building inspection requirements and the inspector competence requirements in the relevant measure-specific Annex.

### 3.18 Recognition of Prior Experience and Learning (RPEL)

process by which prior experience and learning is assessed against relevant criteria to provide evidence for credit towards a vocational qualification

### 3.19 Register of Regulated Qualifications (RRQ)

register of nationally regulated qualifications

**NOTE 1** This register is maintained by:

- in England, the Office of the Qualifications Examinations Regulators;
- in Northern Ireland, the Council for Curriculum, Examinations and Assessment;
- in Scotland, the Scottish Qualification Authority; and
- in Wales, Qualifications in Wales.

**NOTE 2** For further information, visit: <https://register.ofqual.gov.uk/>.

### 3.20 retrofit assessment

survey, inspection and assessment of a dwelling to collate information for a retrofit design

### 3.21 Retrofit Assessor

person qualified to carry out a retrofit assessment

### 3.22 Retrofit Coordinator

person qualified as a specialist retrofit project manager, taking overall responsibility for overseeing the assessment of dwellings, the identification, specification and evaluation of energy efficiency measures for installation at a given dwelling as a single project, and their subsequent monitoring and evaluation

### 3.23 retrofit design

package of information prepared by a Retrofit Designer that determines the unique combination of EEM systems, products, materials and their inter-relationship, to be installed in a particular dwelling in order to achieve specified energy efficiency and other outcomes for that dwelling

### 3.24 Retrofit Designer

person qualified to prepare a retrofit design, in accordance with PAS 2035:2023

### 3.25 Retrofit Installer

specialist person or organization undertaking the physical placement of an energy efficiency measure(s) in an existing dwelling.

*NOTE Not all projects compliant with PAS 2035/2030 have a Main Contractor, but all projects should have a Retrofit Installer. In some projects, the Main Contractor and the Retrofit Installer may be the same organization. Compliance with this PAS is the responsibility of the PAS Certification holder who may be the Retrofit Installer; however where there is no Retrofit Installer, then this responsibility falls to the Main Contractor.*

### 3.26 supervision

provision of operational oversight by an operative who meets the threshold and/or specialist competence or vocational qualification level required for the installation of an EEM type in the type of building being improved and is appointed by the Retrofit Installer to do so

### 3.27 vocational competence

holding a regulated and industry agreed, occupational qualification or apprenticeship, or a personal certificate of competence relevant to the EEM to be installed, or for electrical work compliance with the EAS, all of which include assessment of ability to deliver required outcomes through the practical application of acquired knowledge and skills in a workplace environment

*NOTE In Scotland vocational competence guidance is available for relevant EEMs in the Scottish Matrix for Retrofit Skills and Competencies [4] developed by industry and the relevant Sector Skills Councils in Scotland.*

### 3.28 vocational competence (acquiring)

process of becoming vocationally competent through participation in a structured training and/or assessment programme

### 3.29 vocational competence ratio

quantitative relationship between the number of operatives working on any particular retrofit project with vocational competence and the number of operatives engaged on the same project who are acquiring vocational competence

### 3.30 vocational qualification

recognition of knowledge, understanding and skills relevant to a particular occupation or employment and to the EEM to be installed, necessary to deliver required outcomes safely through the practical application of that acquired knowledge and skills in a workplace environment as defined by the demands and outcome of a regulated, industry agreed, approved course or apprenticeship included in the RRQ

### 3.31 vocational qualification currency

period for which vocational competence is considered adequate without further training or knowledge acquisition specified in respect of the particular vocational qualification(s), personal certification scheme(s) or EAS compliance, relied upon for the demonstration of vocational competence

## 4 Retrofit project management

Prior to commencement of installation, the Retrofit Installer shall confirm that a Retrofit Coordinator has been appointed in accordance with the requirements of PAS 2035 and make the Retrofit Coordinator's identity and role responsibilities known to all personnel working on or in connection with the project. The Retrofit Installer shall provide the Retrofit Coordinator with access to work in progress (including pre-installation inspection, installation, testing, commissioning and handover), for the purpose of inspecting progress and quality.



## 5 The retrofit design

### 5.1 Retrofit Installer responsibility to be in possession of a retrofit design

For each planned installation of EEM, the Retrofit Installer shall obtain a location-specific retrofit design conforming to PAS 2035:2023 for the complete package of measures to be installed as part of that project. The Retrofit Installer shall not commence installation until the relevant design has been obtained and validated.

**NOTE** *The Retrofit Installer is entitled to rely on a claim of conformity of the retrofit design with PAS 2035:2023 provided by the Retrofit Coordinator unless they become aware of evidence to the contrary.*

### 5.2 Validation of the retrofit design

#### 5.2.1 General requirement

Before incorporating the retrofit design into the installation method statement and commencing installation, the Retrofit Installer shall confirm that the retrofit design is complete and suitable for the dwelling(s) for which it has been prepared by means of the pre-installation building inspection (see 7.2) and through application of 5.2.2 to 5.2.5.

If the retrofit design provided is found to be deficient or unsuitable for the dwelling(s) in which installation is to be undertaken, then clarification, further information or a revised retrofit design shall be obtained from the Retrofit Coordinator. Installation shall not proceed until both the Retrofit Installer and the Retrofit Coordinator are satisfied that the design is complete and suitable for the dwelling(s).

**NOTE 1** *Throughout this PAS, the primary relationship between design and installation is assumed to be between the roles of Retrofit Coordinator and Retrofit Installer. The Retrofit Coordinator may however designate members of their team e.g. the Retrofit Designer, to undertake communication.*

**NOTE 2** *Final responsibility for the suitability of the design remains with the Retrofit Coordinator.*

#### 5.2.2 Retrofit design documentation

The Retrofit Installer shall check that the retrofit design documents received from the Retrofit Coordinator include the items identified in this subclause, where relevant to the EEM installation to be undertaken:

- identification of the address and precise location of the dwelling(s) in which the EEM(s) are to be installed;
- identification of any access constraints and access instructions provided by the client or the occupants;
- a copy of the assessment report of the condition of the dwellings including identification of any repairs necessary before installation of EEMs;
- any assumptions on which the design is based, including assumptions that underpin the assessment of the dwelling(s);
- confirmation that the design conforms to the relevant standards;
- specifications of the materials, products and systems to be used, and of where and how they are to be installed, whether within the dwelling or on its exterior;
- construction details for all affected corners, junctions and edges of installed measures (whether prepared by the Retrofit Designer), or clear identification of any standards details that are to be used, and where;
- installation instructions for all new systems and equipment;
- testing requirements;
 

**NOTE 1** *Examples of testing requirements include testing of new gas systems and electrical installations, thermography to confirm the integrity of the insulated envelope, fan pressurization testing to demonstrate compliance with any airtightness standard, etc.*
- commissioning requirements;
- handover requirements;
- maintenance instructions; and
- guarantee and warranty requirements.

Where any of these elements are missing from the design documentation the Retrofit Installer shall consult the Retrofit Coordinator about whether this was intended.

**NOTE 2** *If elements are intentionally missed from the design documentation, then there needs to be a clear explanation as to why this is the case. If the Retrofit Installer asks for the missing documentation to complete the installation, then this should be communicated with the Retrofit Coordinator and an agreement put in place as to whom should produce the missing documentation.*

### 5.2.3 Scope, adequacy and suitability of the design

The Retrofit Installer shall check that the retrofit design includes, takes into account and makes provision for, the elements set out in this subclause:

- all interfaces between measures, both physical junctions and technical interactions as identified by the Measures Interaction Matrix (see Annex A);
- improvement of the airtightness of the building envelope, i.e. reduction of wind-driven air infiltration and air leakage; and
- management of moisture within the construction and the need for a dynamic moisture equilibrium to be maintained with materials, using vapour permeable and capillary active materials as appropriate to maintain a moisture-balanced construction, such that moisture would not become trapped within any construction leading to a risk of damp and deterioration;

**NOTE 1** *Retrofit Installers should be aware that retrofit designs for dwellings where moisture could be an issue is likely to make reference to BS 5250. Where necessary, dynamic modelling of moisture transfer should be carried out.*

- minimizing thermal bridging at the corners, junctions and edges of installed measures, and at interfaces between them;
- eliminating thermal bypass, i.e. the uncontrolled penetration of cold external air to the warm side of any insulation layer;
- resilience against rainwater ingress (including ingress due to failure of any critical element or construction detail);
- provision of combustion air supplies for any open-flued combustion appliances located within the dwelling;
- mitigation of the risk of summer overheating;
- maintenance requirements to verify the long-term integrity of the installation;
- protection of the dwelling against the risk of fire occasioned by the installation of EEM; and
- resilience of installed EEM to flood risk.

Where any of these elements have not been included the Retrofit Installer shall consult the Retrofit Coordinator about whether this was intended.

**NOTE 2** *If elements are intentionally missed from the design documentation, then there needs to be a clear explanation as to why this is the case. If the Retrofit Installer asks for the missing documentation to complete the install, then this should be communicated with the Retrofit Coordinator and an agreement put in place as to whom should produce the missing documentation.*

### 5.2.4 Provision of adequate ventilation

For any retrofit design in which one or more EEM with the potential to reduce the level of background infiltration in habitable rooms is included (e.g. wall insulation, floor insulation, roof and loft insulation, draught stripping or replacement windows), the Retrofit Installer shall check that the retrofit design includes details of how adequate ventilation is to be maintained or provided to confirm good internal air quality and minimize surface and interstitial condensation risk. Where such detail is not included or is perceived as being inadequate, the Retrofit Installer shall consult the Retrofit Coordinator about whether this was intended.

**NOTE 1** *When checking the design, the Retrofit Installer should also take account of any measure-specific ventilation related requirements in the applicable measure-specific annexes.*

**NOTE 2** *If ventilation details are intentionally missed from the design documentation, then there needs to be a clear explanation as to why this is the case. If the Retrofit Installer asks for the missing documentation to complete the install, then this should be communicated with the Retrofit Coordinator and an agreement put in place as to whom should produce the missing documentation.*

### 5.2.5 Testing and commissioning

The Retrofit Installer shall check that the retrofit design includes instruction about how installed EEM are to be tested and commissioned, and that such instructions take account of any relevant manufacturer's instructions and/or measure-specific requirements in the relevant Annex in this PAS. Where such information has not been included the Retrofit Installer shall consult the Retrofit Coordinator about whether this was intended.

**NOTE 1** *Where the retrofit design includes multiple EEMs that are required to be commissioned, PAS 2035:2023 requires the Retrofit Designer to specify that building services measures may be pre-commissioned individually but should be finally commissioned together at the same time, not separately.*

**NOTE 2** *If testing and commissioning information is missed from the design documentation, then there needs to be a clear explanation as to why this is the case. If the Retrofit Installer asks for the missing documentation to complete the installation, then this should be communicated with the Retrofit Coordinator and an agreement put in place as to whom should produce the missing documentation.*

## 6 Installation process

### 6.1 Installation method statement

#### 6.1.1 Inclusion of relevant installation process(es)

Prior to commencement of any installation work the Retrofit Installer shall define and record in a location-specific installation method statement the complete installation process to be followed for each energy efficiency measure to be installed (or package of measures), under the scope of this PAS and in accordance with the retrofit design. The method statement shall include and take account of the elements specified in 6.1.2 to 6.1.6.

*NOTE A generic method statement may be used, but if the installation method deviates from it in any way, then a location-specific method statement should be created either by editing the generic method statement or appending information to it to define the variation.*

#### 6.1.2 Reference to normatively referenced standards

In incorporating the retrofit design in the location-specific EEM installation method statement, the Retrofit Installer shall take account of all normatively referenced standards and any other relevant documents identified in this PAS, and where these are relevant to the installation to be undertaken shall be able to demonstrate how they have been incorporated in the installation method statement.

*NOTE If the Retrofit Installer be aware of potentially relevant standards or other similar documents that have not been referenced in the retrofit design, the Retrofit Installer should draw these to the attention of the Retrofit Coordinator.*

#### 6.1.3 Identification of the relevant measure-specific annexes

The Retrofit Installer shall identify from the measure-specific annex(es) included in this PAS (see A.1, Tables A.1 to A.3) the measures relevant to the retrofit design including any reference to EEM types, that could determine the scope of required competence for that installation. The Retrofit Installer shall make provision in the method statement for implementation of the requirements set out in the identified annexes.

#### 6.1.4 Inclusion of relevant installation methods

The method statement shall include method(s) and sequences for the installation of the EEM(s) as specified in the retrofit design or originating from the product/system specification sheets, from system certification documents or other such information provided by the product or system manufacturer(s) or supplier(s).

#### 6.1.5 Acquisition of missing method(s)

Where an installation method is not provided with a product or system, the Retrofit Installer shall, prior to commencing the installation, contact the manufacturer, supplier or Retrofit Coordinator, as applicable, to obtain the required information. In the event that installation methods cannot be obtained, commencement of the installation shall be deferred until the required alternative or customized method has been agreed with and issued to the Retrofit Installer by, the Retrofit Coordinator.

#### 6.1.6 Provision for intermediate inspection

The Retrofit Installer shall include in the method statement the necessary facility to accommodate any intermediate inspections required by external parties which includes site inspections by the Retrofit Coordinator.

### 6.2 Installation equipment and tools

#### 6.2.1 Availability

The Retrofit Installer shall determine and make available the equipment necessary for the installation process to be correctly undertaken, including any requirements/instructions for selection and/or use of that equipment.

#### 6.2.2 Maintenance

The Retrofit Installer shall provide resource to maintain all equipment and tools used for installation work such that they are in a fit for purpose and safe condition.

#### 6.2.3 Calibration

**6.2.3.1** Equipment requiring calibration shall be calibrated in accordance with the manufacturer's instruction or verified at intervals determined by the Retrofit Installer prior to use. The interval between such calibrations shall not exceed that recommended by the equipment manufacturer. Where equipment requiring calibration is hired, copies of calibration certificates shall be obtained and retained as a record.

**6.2.3.2** Calibration and verification records for equipment, gauges, measuring and test equipment shall include:

- equipment identification, including the measurement reference standard against which the equipment is calibrated;
- any out of specification readings when equipment is submitted for calibration; and
- a statement of conformity to specification after each calibration or verification.

**6.2.3.3** In the event that the Retrofit Installer has reason to believe that a calibrated item might be out of calibration (e.g. the item has been dropped or mistreated), the Installer shall have in place instruction that operatives cease using the item immediately and arrange for its recalibration or replacement at the earliest practicable time. The Installer shall record the date and time of all instances where recalibration or replacement is required during an installation, and take action to confirm any measurements that might have been made while the item was out of calibration.

## 6.3 Checking, handling and storage of materials and supplies

The Retrofit Installer shall operate a procedure to confirm that operatives are aware of any handling instructions and/or storage conditions for the products or systems that they are installing under the scope of this PAS, whether they are specified by the retrofit design, the manufacturer or the supplier, and that those instructions and conditions are followed.

## 6.4 Provision of installation instructions to operatives

The Retrofit Installer shall provide the following to the operative(s) so that every installation is completed in accordance with the retrofit design:

- the necessary product/system specifications;
- work instructions;
- installation methods; and
- relevant standards, repair requirements and location-specific information to enable the installation to be completed in accordance with the retrofit design.

Location-specific information shall include at least the following:

- briefing of operatives undertaking installation tasks about the importance of their installation activities and how they contribute to the achievement of the measure installation specified;

- installation times agreed by the client and any commitments made;
- known special needs or expectations of the client;
- notification of any inter-relationship between measures and measure installation at the same location, particularly in respect of the mutual efficiency and effectiveness of measures, working procedures and timing; and
- any guidance or restrictions about weather conditions in which the specified EEMs might be installed.

## 6.5 People

### 6.5.1 Operative selection, training and work assignment

The Retrofit Installer shall establish and operate procedures to:

- a) determine the vocational competence required by operatives to undertake the required installation tasks, and by others engaged on the project (e.g. for enabling work);
- b) verify the engagement of a sufficient number of vocationally competent operatives as specified in the relevant measure-specific annex;
- c) undertake periodic assessment of the individual vocational competence (see 3.27) of its skilled workforce (direct or sub-contracted) to verify that all individuals involved in skilled installation work are either vocationally competent or are acquiring vocational competence;
- d) verify that all operatives have access to any training required to maintain their skills and knowledge, including any relevant system-specific training;
- e) provide and arrange access to training (including any relevant system-specific training) and assessment, for any operatives acquiring vocational competence whilst working under the supervision of a vocationally competent operative;
- f) provide and arrange for training of new entrant operatives (see 3.15) via a measure relevant vocational qualification, apprenticeship or EAS compliance route, and not rely on personal certificates of competence other than as a means of on-going assessment of individual competence following the award of a vocational qualification;
- g) assign operatives to installation projects commensurate with the vocational competence specified in the relevant measure-specific annex and maintain a record of the operatives assigned to and working on each project;

- h) obtain and maintain evidence of the current capability, training, qualifications, competence and identified route to vocational competence for each operative; and
- i) periodically assess the effectiveness of procedures operated under a) to h).

*NOTE Attention is drawn to the fact that there may be requirements relating to the employment and registration of vocationally competent operatives engaged in EEM installations, under some funding schemes.*

### 6.5.2 Briefing

Before any work to install EEMs begins, the Retrofit Installer shall review the requirements for briefings (or “toolbox talks”) by the Retrofit Coordinator to explain the design intent and draw attention to key points including the intended installation sequence(s) where relevant. Briefings shall always be requested if:

- the project includes any building fabric insulation measures or replacement windows on a high-rise or system-built dwelling; or
- the building to be improved (or any part of it) is traditionally constructed<sup>5)</sup>, and the proposed EEMs are likely to have an impact upon the historic significance and/or building fabric of the building; or
- the retrofit design includes new or unusual materials, products or systems with which the Retrofit Installer(s) are not familiar; or
- the Retrofit Installer(s) have not installed the specified EEMs before; or
- the design is intended to achieve unusually challenging performance standards (e.g. with respect to air-tightness).

If a request for a briefing is refused, then the Retrofit Installer shall ask the Retrofit Coordinator to justify why a briefing need not or cannot be provided.

### 6.5.3 Installation supervision

**6.5.3.1** The Retrofit Installer shall assess the respective vocational competence of operatives assigned to the installation tasks required for each installation and provide a level of supervision in accordance with the vocational competence and vocational competence ratio provided in the relevant measure-specific annex.

**6.5.3.2** Supervision shall include monitoring and inspecting operatives and testing their work at the location of the work to verify that:

- they comply with the requirements of this PAS and that measures are installed at the designated location in accordance with the retrofit design and to the satisfaction of the Client; and

- no actions are taken during the installation that might be detrimental to the health or welfare of the occupants, the Retrofit Installer’s operatives or other members of the public, or detrimental to the integrity of the dwelling, even if specified in the retrofit design (and instead to bring such issues to the attention of the Retrofit Coordinator and request appropriate amendments).

**6.5.3.3** Supervision shall be continuous during working hours for the same situations as defined in the bullet points of **6.5.2**.

## 6.6 Subcontract Installers

Where the Retrofit Installer subcontracts any part of the installation, the Retrofit Installer shall include the contractual requirement that the subcontract installer complies with all requirements of the retrofit design that are relevant to the installation related tasks to be undertaken and verify that the subcontract installer has the necessary vocational competence for the installation tasks sub-contracted. The Retrofit Installer shall retain responsibility for compliance with the retrofit design and with this PAS for all work sub-contracted.

## 6.7 Testing

The Retrofit Installer shall arrange any testing of the improved dwelling (e.g. air-tightness testing) before, during and/or after installation of the EEMs, and of individual building systems (whether new or existing) to be carried out as specified by the retrofit design. The Installer shall supply copies of test results and certificates to the Retrofit Coordinator.

## 6.8 Commissioning

The Retrofit Installer shall be responsible for:

- the installed EEMs being commissioned in accordance with the retrofit design;
- a record being made of commissioning action undertaken, including any performance measurement results obtained; and
- commissioning certificates confirming satisfactory results being obtained or prepared as appropriate and copies supplied to the Retrofit Coordinator.

<sup>5)</sup> Building construction consisting of solid brick or stone external walls, or pre 1919 timber framed external walls with any infill.

## 6.9 Handover

### 6.9.1 Timing and extent of handover

When the EEMs are fully installed and commissioned and with any operationally material defects corrected, the Retrofit Installer shall undertake a handover procedure with the client in accordance with the instructions provided in the retrofit design and the relevant measure-specific annex, including the handover of any documentation identified by them.

The handover process shall, where possible, involve physical inspection of the installed measures and an explanation of their function and operation, including demonstrations of the operation of components, devices and controls. The use of any user guides, maintenance manuals and other documents necessary for the safe, efficient and effective care, operation and maintenance of the installed measures, shall also be explained. All guides, manuals, guarantee certificates and other relevant documentation shall be provided to the client(s) via the Retrofit Coordinator and/or located adjacent to the installed measures. The Retrofit Installer shall retain access to copies of these documents for future reference.

The handover shall include a visual check that the person receiving the instruction is able to operate components and controls, and information about:

- the safe operation of the installed measure including operable components (e.g. windows, including any restrictor hardware), electrical equipment, mechanical equipment and associated control devices (e.g. boilers and heating controls). Where practicable, this shall include both demonstration and a visual check that the person receiving the instruction is able to operate components and controls;
- the care of the installed measure to avoid detrimental effects (e.g. avoidance of penetrating air barriers);
- by inserting fixings into internally insulated walls, regular cleaning and replacement of air filters in mechanical ventilation systems;
- the maintenance of the installation so that it operates safely, efficiently and effectively, in accordance with the requirements of any guarantees or warranties provided by the manufacturer and/or the Retrofit Designer or the relevant measure-specific annex; and
- the efficient operation of the installation to facilitate the delivery of the expected reduction in energy use.

### 6.9.2 Personnel undertaking the handover

Prior to the handover process the Retrofit Installer shall verify that the operatives undertaking the handover are vocationally competent to do so and have access to adequate knowledge on the measures involved in the installation together with the behaviour required for their safe, efficient and effective operation and maintenance. Information provided to assist operatives in the handover process shall be clear, structured, relevant and appropriate.

## 6.10 Installation control

The Retrofit Installer shall operate a documented installation control procedure which validates that:

- the installations undertaken conform to the retrofit design and the location-specific method statement; and
- nothing has been done during the installation that could invalidate any manufacturer's or system supplier's guarantee or warranty.

Records of the installation control outcomes for each installation undertaken shall be made and signed by the Retrofit Installer.

## 6.11 Installation documents and record keeping

The Retrofit Installer shall operate a documented procedure to demonstrate that the information contained in the location-specific method statement (see 6.1) for each installation is available to, and has been used by, the operatives undertaking that installation.

The Retrofit Installer shall keep photographic records of all installation work that is subsequently covered up by later work, linings or finishes or was accessed via scaffolding or similar means such that it subsequently becomes inaccessible for inspection. Photographs shall be sufficiently numerous and detailed to demonstrate that the work has been completed in accordance with the retrofit design and the method statement. The date and location of each photograph shall be marked on the photograph automatically by the camera.

Records relating to the use of work instructions, relevant installation methods and constituent tasks shall include the nature and timing of any changes to installation related activities that might be authorized.

## 7 Installation process management

### 7.1 Operation and process oversight

The Retrofit Installer shall operate procedures designed to verify that pre-installation building inspection and installation processes in relation to the installation of EEM measures are undertaken and completed in accordance with the retrofit design, to the satisfaction of the Client(s) and in accordance with the requirements of this PAS, including:

- the measures installed;
- the use of specified installation methods;
- any required ventilation upgrade including the procurement and installation of any required ventilation upgrade from a ventilation specialist;
- avoidance of thermal bridging;
- testing;
- commissioning; and
- handover.

### 7.2 Pre-installation building inspection

#### 7.2.1 Undertaking the inspection

The Retrofit Installer shall undertake a pre-installation inspection of the designated location on the basis of the installation method statement prepared under 6.1, using a vocationally competent person as defined in the relevant measure-specific annex of this PAS.

The inspection shall be undertaken at a level of detail sufficient to confirm that the specified EEM can be safely and effectively installed at the designated location. Particular attention shall be given to potential moisture build up as a result of the installation and taking into account the fire safety of the dwelling and the functionality and/or safety of installed services (gas, electricity, water, telecommunications, etc.). The inspection shall include any specific pre-installation inspection requirements from the relevant measure-specific annex of this PAS.

As part of the pre-installation inspection the Retrofit Installer shall confirm to the Retrofit co-ordinator that the repair works identified by pre-installation assessment for the design have been undertaken.

#### 7.2.2 Notification of pre-installation building inspection

The Retrofit Installer shall provide information as to the location and timing of forthcoming pre-installation building inspections to the Retrofit Coordinator and to any relevant certification body, and make arrangements for the inspection to be assessed, upon request by that body if it wishes to do so.

#### 7.2.3 Suitability and completeness of the installation method statement

The suitability and completeness of the installation method statement (see 6.1) shall be checked as part of the pre-installation building inspection. In the event that the method statement is found to be inadequate, the findings of the pre-installation inspection shall be used to inform the correction or further development of the method statement.

#### 7.2.4 Suitability and completeness of the retrofit design

The suitability and completeness of the retrofit design (see Clause 5) shall be reviewed as part of the pre-installation building inspection and actions taken to bring to the attention of the Retrofit Coordinator:

- anything missing from the retrofit design that might reasonably be expected to be included (see Clause 5);
- anything that is contrary to the stated design assumptions (e.g. assumptions about areas that can only be examined after opening-up the construction); and
- any aspect of the design and specification that cannot be implemented.

The Retrofit Installer shall request appropriate amendment of the retrofit design or the provision by the Retrofit Coordinator with written confirmation that installation can proceed without amendment.

#### 7.2.5 Confirmation with the client

Before conclusion of the pre-installation building inspection, the Retrofit Installer shall confirm with the client that:

- the nature and extent of the specified installation is known to the client and is in line with that client's expectations;
- the arrangements made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken; and
- the intended days and hours of working are acceptable.

### 7.2.6 Pre-installation building inspection records

Records of the pre-installation building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the retrofit design and any Client-related issues, shall be made by the inspector and retained by the Retrofit Installer. A copy shall be made available to the Retrofit Coordinator and/or any relevant validation body, on request.

**NOTE 1** *For loft insulation and draught-proofing measures only, the pre-installation building inspection could be included as a first stage of an installation visit provided provision is made for actual installation not to proceed until any identified problems have been resolved.*

**NOTE 2** *Attention is drawn to the need to comply with applicable statutory requirements.*

**NOTE 3** *Attention is drawn to the need for the pre-installation building inspection to note any potential risk in relation to the on-going performance of installed services and enable liaison with the Retrofit Designer and/or service providers where relevant.*

**NOTE 4** *Retrofit Installers should encourage the persons appointed to undertake pre-installation inspections to familiarize themselves with BS 7913 and BS 5250.*

### 7.2.7 Presence of protected species

In the event that a species or plant that could be subject to special protection are found to be present at the designated location, the inspector shall include report of that presence in the inspection record and make the presence known to the Retrofit Installer and the Retrofit Coordinator.

**NOTE** *Such species could include bats, birds, butterflies or dormice.*

### 7.2.8 Action in response to inspection findings

In the event that the pre-installation building inspection reveals potential installation problems, the Retrofit Installer shall notify the Retrofit Coordinator and any relevant statutory authorities. The Retrofit Installer shall work with the Retrofit Coordinator, as necessary, to develop a mutually agreed solution. Installation shall not commence until such a solution has been agreed by the Retrofit Coordinator and confirmed with the client. The Retrofit Installer shall always obtain the written agreement of the Retrofit Coordinator to any introduction of changes to the defined installation process.

### 7.3 Action in respect of intermediate inspection

Where an intermediate inspection is required in respect of particular measures as part of the overall installation process, the Retrofit Installer shall establish and operate procedures so that any subsequent inspection cannot continue until the intermediate inspection has been completed and clearance to continue has been given.

## 7.4 Installation change

### 7.4.1 Introduction of new or modified materials, products, construction details or processes

Any proposed variation to the retrofit design or location-specific method statement shall be defined, documented and submitted to the Retrofit Coordinator for approval. Installation work shall not proceed until such approval has been obtained.

**NOTE** *Proposed variations include the substitution of alternative materials, products, construction details or processes.*

### 7.4.2 Compatibility of installation process change

Any change to an installation process shall be accompanied by a review of related tasks and methods to verify compatibility with the installation of other measures being installed at the same premises.

### 7.4.3 Internal feedback

The Retrofit Installer shall establish and operate a process to facilitate internal feedback on the installation process from inspectors and installation operatives. Any feedback received shall be documented and acknowledged prior to being investigated and corrected, where judged beneficial. Any decision not to take corrective action in relation to negative feedback shall be documented, including the reasons for reaching that decision.

### 7.4.4 Remedial works during construction

During the repair works, pre-installation works or the installation of the EEMs, the Retrofit Installer is responsible for reporting to the Retrofit Coordinator any defects (such as structural and moisture-related defects) that they identify during the works that were not identified in the assessment report, and seeking advice from the Retrofit Coordinator on how to proceed.

## 7.5 Process continuity plan

When not otherwise arranged by the Retrofit Coordinator, the Retrofit Installer shall operate arrangements that in the event of an unforeseen circumstance that prevents the Retrofit Installer from completing an installation, all uncompleted installations are transferred to another Retrofit Installer and completed in accordance with the retrofit design and with this PAS. Where the Retrofit Installer is providing sub-contracted services to a main contractor it shall be the responsibility of the main contractor to confirm that there is a process continuity plan in place.



## 7.6 Process control

The Retrofit Installer shall operate a documented installation process control procedure capable of demonstrating that the requirements of this PAS have been met for each installation undertaken, including the completion of the installation control procedure. Records of the application of the installation process control procedure shall be maintained for each installation and signed by Retrofit Installer.

## 7.7 Internal audit and corrective action

### 7.7.1 Procedure

The Retrofit Installer shall conduct a review of their operating system(s) at least once each year for each type of installation undertaken, to conform with the requirements of this PAS. Records of the review and any resulting actions taken to correct and prevent any future noncompliance shall be made and retained.

*NOTE Retrofit Installers carrying out large numbers of installations of the same type should consider undertaking audits more frequently on a percentage basis, in preference to the maximum interval specified above.*

### 7.7.2 Investigation

The cause and consequences of issues raised during internal audit (see 7.7.1) shall be identified, systematically examined and the findings documented.

### 7.7.3 Corrective action

Corrective action shall include rectification of the particular occurrences identified under 7.7.2 and initiation of measures to prevent recurrence.

### 7.7.4 Verification of corrective action

The effectiveness of corrective actions undertaken (see 7.7.3) shall be assessed by the Retrofit Installer and outcomes documented.

## 7.8 Installation process records

The Retrofit Installer shall establish and maintain records containing at least the information identified in a) to r), in relation to each installation undertaken for which compliance with this PAS is claimed:

- a) location of the installation;
- b) identification of the Retrofit Coordinator;
- c) identification of the Retrofit Designer;
- d) type of measure(s) installed;
- e) dates of installation commencement, completion, testing, commissioning and handover;
- f) identification of specific products/systems installed;

- g) the installation method statement including all related retrofit design documents;
- h) records of any assessments of exposure and wind load calculations;
- i) records of any pull-out tests carried out;
- j) details of any problems encountered, corrections agreed and remedial work undertaken;
- k) records of inclement weather and duration of delay or hold up experienced when installing EEM;
- l) name(s) of operatives undertaking the installation and their vocational competence levels;
- m) photographs as required by 6.11;
- n) results of performance testing carried out;
- o) commissioning records;
- p) relevant installation certificates;
- q) confirmation that the installation process has been undertaken in accordance with this PAS signed off by a vocationally competent person, authorized to do so on behalf of the Retrofit Installer; and
- r) confirmation of any claim of compliance with this PAS, issued to the client or funding body.

Installation process records shall be retained for six years or the term of any EEM guarantees (whichever is longer) and shall be made available to the Retrofit Installer's PAS 2030 certification body and to the Retrofit Coordinator, when requested.

## 7.9 Business and financial probity

### 7.9.1 Financial resource and insurance

The Retrofit Installer shall be able to demonstrate the financial stability and business resources likely to sustain the operation of an EEM installation service. The Retrofit Installer shall have adequate arrangements, including insurance, to underwrite the liabilities arising from any claims resulting from the following:

- deficiencies of product or system selection;
- design;
- detailing or installation; and
- appropriate guarantees and warranties of the work, as required by the retrofit design or by any applicable quality assurance scheme.

### 7.9.2 Clarity of contractual liability

Where the Retrofit Installer is contracted to the client on a "design and build" basis, the roles of the Retrofit Designer and Retrofit Installer shall be clearly defined and distinguished in the contract documentation to permit claims against either or both of them, in the event of a defective installation.

## 8 Service provision

### 8.1 Complaints procedure

The Retrofit Installer shall operate a documented complaints procedure for receiving, recording, acknowledging and resolving all complaints from clients.

### 8.2 Complaints records

The Retrofit Installer shall maintain records of all complaints and their resolution for six years or the duration of any EEM guarantees (whichever is longer). Copies of such records shall be made available to the Retrofit Installer's PAS 2030 certification body or to the Retrofit Coordinator, when requested.

### 8.3 Interaction with clients

The Retrofit Installer shall operate a procedure to instruct each operative likely to have direct contact with clients or the occupants of the dwellings being improved, as to how to act in response to an approach from clients especially, but not exclusively, in respect of:

- vulnerable occupants (e.g. elderly or disabled persons or children);
- pre-notified client requirements and expectations particularly issues of work timing and access;
- agreed client service requirements;
- client questions or requests for information;
- client request for additional measure-related work extending beyond the installation process definition; and
- client complaint or other client feedback in respect of some aspects of the installation or installation process.

## 9 Claims of compliance

### 9.1 Applicability of claims

Claims of compliance with this PAS shall be in respect of the processes and procedures employed and their application in the installation of EEM in any given dwelling. Such claims shall not be used to imply the quality or performance of the EEM installed, which is the subject of claims of compliance with PAS 2035:2023.

### 9.2 Requirement to claim

The installation of energy efficiency measures for which the processes, procedures and methods of application used and claim to comply with the requirements of this PAS shall be supported by a declaration of conformity to this PAS, expressed in the form provided in 9.3, issued to the client and to the Retrofit Coordinator. Where the claim is to 9.3.1, the certification body providing evaluation services in respect of the installation shall be notified.

### 9.3 Basis of claim

#### 9.3.1 Independent third-party certification

Where compliance with this PAS is confirmed by an independent third-party certification body, the following statement shall be used as the declaration of conformity:

- The installation of [energy efficiency measure(s)] at [location of installation] and handed over on [date of handover] has been undertaken by [name of Retrofit Installer] on the basis of a retrofit design claimed to comply with PAS 2035, using a process complying with PAS 2030, including Annex(es) [insert references to relevant measure-specific annex(es)]. [Insert unambiguous identification of the certification body].

#### 9.3.2 Other party confirmation

Where compliance with this PAS is confirmed by an alternative method other than those qualifying as an accredited independent third-party certification body, the following statement shall be used as the declaration of conformity:

- The installation of [energy efficiency measure(s)] at [location of installation] and handed over on [date of handover] has been undertaken by [name of Retrofit Installer] on the basis of a retrofit design claimed to comply with PAS 2035 using a process complying with PAS 2030, including Annex(es) [insert references to relevant measure-specific annex(es)]. [Insert unambiguous identification of the confirmation body].

#### 9.3.3 Retrofit Installer self-assessment

Where compliance with this PAS is assessed by the Retrofit Installer, the following statement shall be used as the declaration of conformity:

- The installation of [energy efficiency measure(s)] at [location of installation] and handed over on [date of handover] has been undertaken by [name of Retrofit Installer] on the basis of a retrofit design claimed to comply with PAS 2035, using a process complying with PAS 2030, including Annex(es) [insert references to relevant measure-specific annex(es)].

**NOTE** The inclusion of reference to PAS 2030 in relation to any particular installed measure or measures represents the Retrofit Installer's declaration that the process used meets the requirements of this PAS. The accuracy of the claim is solely the claimant's responsibility and is not to be confused with third-party certification of conformity.

# 10 Documents essential to the application of the Annexes of this PAS

## 10.1 Use of the identified documents

The documents listed in Clause 10.2 to Clause 10.9 are cited in the core text or one or more of the measure-specific annexes of this PAS and shall be used as required in the application of any Annex in which they are cited. For dated or edition-specific references, only the edition cited shall apply. For undated references or references that are not edition-specific, the latest edition of the referenced document (including any amendments) shall apply.

## 10.2 Publicly Available Specification and British Standards

PAS 2035, *Retrofitting dwellings for improved energy efficiency – Specification and guidance*

BS 5410-1, *Code of practice for liquid fuel firing – Part 1: Installations up to for space heating and hot water supply purposes for domestic buildings*

BS 5410-2, *Code of practice for oil firing – Part 2: Non-domestic installations*

BS 5440-1, *Flueing and ventilation for gas appliances of rated input not exceeding 70kW net (1st, 2nd, 3rd family gases) – Specification for installation of gas appliances to chimneys and for maintenance of chimneys*

BS 5440-2, *Flueing and ventilation for gas appliances of rated input not exceeding 70 kW net (1st, 2nd and 3rd family gases) – Part 2: Specification for the installation and maintenance of ventilation provision for gas appliances*

BS 5482-1, *Code of practice for domestic butane and propane gas burning installations – Part 1: Permanent dwellings*

BS 5864, *Installation and maintenance of gas-fired ducted air heaters of rated heat input not exceeding 70 kW net (2nd and 3rd family gases) – Specification*

BS 5970, *Thermal insulation of pipework, ductwork, associated equipment and other industrial installations in the temperature range of -100°C to +870°C – Code of practice*

BS 6100-1, *Building and civil engineering – Vocabulary – Part 1 General terms*

BS 6644, *Specification for the installation and maintenance of gas-fired hot water boilers of rated inputs between 70 kW (net) and 1.8 MW (net) (2nd and 3rd family gases)*

BS 6798, *Specification for installation and maintenance of gas-fired boilers of rated input not exceeding 70 kW net*

BS 6891, *Specification for the installation and maintenance of low-pressure gas installation pipework of up to 35 mm (R1 1/4) on premises*

BS 7386, *Specification for draught-strips for the draught control of existing doors and windows in housing (including test methods)*

BS 7593, *Code of practice for the preparation, commissioning and maintenance of domestic central heating and cooling water systems*

BS 7619, *Specification for extruded cellular unplasticized PVC (PVCU) profiles*

BS 7671, *Requirements for electrical installations – IET Wiring Regulations*

BS 7880, *Code of practice for draught control of existing doors and windows in housing using draught strips*

BS 8000-0, *Workmanship on building sites – Part 0: Introduction and general principles*

BS 8558, *Guide to the design, installation, testing and maintenance of services supplying water for domestic use within buildings and their curtilages – Complimentary guidance to BS EN 806*

BS 81234, *Windows and doors – Code of practice for the survey and installation of windows and external door sets*

- BS 8660-1, *Gas-fired micro-cogeneration appliances of rated thermal input not exceeding 70 kW net – Part 1: Specification for selection, installation, inspection, commissioning, servicing and maintenance of Stirling engine micro-cogeneration appliances*
- BS EN 378-1, *Refrigerating systems and heat pumps – Safety and environmental requirements – Part 1: Basic requirements, definitions, classification and selection criteria*
- BS EN 378-3, *Refrigerating systems and heat pumps – Safety and environmental requirements – Part 3: Installation site and personal protection*
- BS EN 378-4, *Refrigerating systems and heat pumps – Safety and environmental requirements – Part 4: Operation, maintenance, repair and recovery*
- BS EN 806-1, *Specifications for installations inside buildings conveying water for human consumption – Part 1: General*
- BS EN 806-4, *Specifications for installations inside buildings conveying water for human consumption – Part 4: Installation*
- BS EN 806-5, *Specifications for installations inside buildings conveying water for human consumption – Part 5: Operation and maintenance*
- BS EN 1264-1, *Water based surface embedded heating and cooling systems – Part 1: Definitions and symbols*
- BS EN 1264-2, *Water based surface embedded heating and cooling systems – Part 2: Floor heating: Prove methods for the determination of the thermal output using calculation and test methods*
- BS EN 1264-3, *Water based surface embedded heating and cooling systems – Part 3: Dimensioning*
- BS EN 1264-4, *Water based surface embedded heating and cooling systems – Part 4: Installation*
- BS EN 1264-5, *Water based surface embedded heating and cooling systems – Part 5: Heating and cooling surfaces embedded in floors – Determination of the thermal output*
- BS EN 1670, *Building hardware – Corrosion resistance – Requirements and test methods*
- BS EN 12828, *Heating systems in buildings – Design for water-based heating systems*
- BS EN 12831, *Heating systems in buildings: Method for calculation of the design heat load*
- BS EN 13120, *Internal blinds – Performance requirements including safety*
- BS EN 13561, *External blinds and awnings – Performance requirements including safety*
- BS EN 13659, *Shutters and external venetian blinds – Performance requirements including safety*
- BS EN 14336, *Heating systems in buildings – Installation and commissioning of water-based heating systems*
- BS EN 15316-4-8, *Heating systems in buildings – Method for calculation of system energy requirements and system efficiencies – Space heating generation systems, air heating and overhead radiant heating systems*
- BS EN 16484-1, *Building automation and control systems (BACS) – Project specification and implementation*
- BS EN 16883, *Conservation of cultural heritage – Guidelines for improving the energy performance of historic buildings*
- BS EN 62446-1, *Photovoltaic (PV) systems – Requirements for testing, documentation and maintenance – Grid connected systems – Documentation, commissioning tests and inspection*
- BS EN ISO 11600, *Building construction – Jointing products – Classification and requirements for sealants*

### 10.3 Institution of Gas Engineer and Managers – Standards

(Available from [www.igem.org.uk/technical-services/technical-gas-standards/](http://www.igem.org.uk/technical-services/technical-gas-standards/))

IGEM UP/1, 1A & 1B, *Strength testing, tightness testing and direct purging each standard covers industrial commercial and domestic testing and purging requirements*

IGEM/UP/2, *Installation of pipework on industrial and commercial premises*

IGEM/UP/7, *Gas installations in timber-framed and light steel buildings*

## 10.4 Energy Networks Association Engineering Recommendations

(Available from [www.energynetworks.org/electricity/engineering/distributedgeneration.html](http://www.energynetworks.org/electricity/engineering/distributedgeneration.html))

*G59/3, Distributed Generation Connection Guide – A guide for connecting generation that falls under G59/3 to the distribution network*

*G83/1-1, Stage 1: Distributed Generation Connection Guide – A guide for connecting generation that falls under G83/1-1 STAGE 1 to the distribution network*

*G83/2-1, Stage 2: Distributed Generation Connection Guide – A guide for connecting generation that falls under G83/1-1 STAGE 2 to the distribution network*

Recommendations for the Connection of Small-scale Embedded Generators (up to 16 A per phase) in Parallel with Public Low-voltage Distribution Networks

## 10.5 UKLPG

(Available from [www.uklpg.org/shop/codesofpractice/](http://www.uklpg.org/shop/codesofpractice/))

Code of Practice 22, *Design installation and testing of LPG piping systems*

## 10.6 Ministry of Housing, Communities and Local Government

Domestic Building Services Compliance Guide [N1]  
(available from [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/697525/DBSCG\\_secure.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/697525/DBSCG_secure.pdf))

## 10.7 Other insulation installation guidance references

### 10.7.1 External solid wall insulation

Specification for the installation of external wall insulation ensuring the safety and operation of fuel burning appliances, version 2

External Wall Insulation Specification for Weathering and Thermal Bridge Control [N2]

*External Wall Insulation Pre-Installation Building Inspection Checklist [N3]*

*EWI Building Owner Maintenance Pack/Schedule [N4]*

All available from the National Insulation Association (NIA), the Insulated Render and Cladding Association (INCA) or the Solid Wall Insulation Guarantee Agency (SWIGA)

### 10.7.2 Room in roof insulation (see B.12)

Retrofit room in roof insulation guide to best practice. Jan 2022<sup>6)</sup>. [N5]

<sup>6)</sup> Available at [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1045178/retrofit\\_room\\_in\\_roof\\_insulation\\_best\\_practice.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1045178/retrofit_room_in_roof_insulation_best_practice.pdf)

## Annex A (informative)

### Measure-specific annex selection and co-installation requirements

#### A.1 Introduction

The clauses of this annex provide:

- in A.2 and A.3, information to facilitate the inclusion of measures specified in each retrofit design in the installation method statement (see 6.1);
- in A.4, information in respect of the potential for relationship between installed measures and between installed measures and the dwelling in which they are installed; and
- in A.5, information to assist the avoidance of thermal bridging.

#### A.2 Efficiency measures and types arranged by measure category

**Table A.1 – Category BFM (Building Fabric Measures)**

| Measure   | Measure type                                      | Measure reference | Current annex clause |
|---|---|-------------------|----------------------|
| Cavity wall insulation including that installed in party walls                        | As measure  | BFM.1             | B.1                  |
| Draught proofing  | As measure  | BFM.2             | B.2                  |
| Energy efficient glazing and doors including replacement insulating glass units (IGU) | As measure  | BFM.3             | B.3                  |
| External wall insulation  | 1. Site rendered external wall insulation systems | BFM.4.1           | B.4                  |
|   | 2. Pre-finished external wall insulation systems  | BFM.4.2           |                      |
| Flat roof insulation  | As measure  | BFM.5             | B.5                  |
| Floor insulation  | As measure  | BFM.6             | B.6                  |
| Hybrid wall insulation  | As measure  | BFM.7             | B.7                  |
| Internal wall insulation  | As measure  | BFM.8             | B.8                  |
| Loft insulation   | 1. Roll insulation                                | BFM.9.1           | B.9                  |
|   | 2. Blown insulation                               | BFM.9.2           |                      |
| Pitched roof insulation   | As measure  | BFM.10            | B.10                 |
|   | 1. Mechanically operated devices                  | BFM.11.1          |                      |
| Solar blind, shutters and shading devices (internal and external)                     | 2. Electrically operated devices                  | BFM.11.2          | B.11                 |
|   | As measure  | BFM.12            |                      |
| Room-in-roof insulation   | As measure  | BFM.12            | B.12                 |
| Park homes insulation   | As measure  | BFM.13            | B.13                 |

Table A.2 – Category BSM (Building Services Mechanical)

| Measure   | Measure type   | Measure reference | Current annex clause |
|---|--|-------------------|----------------------|
| Condensing boilers, natural gas-fired and liquefied petroleum gas-fired                   | As measure   | BSM.1             | C.1                  |
| Condensing boilers, oil-fired   | As measure   | BSM.2             | C.2                  |
| Flue gas heat recovery devices  | Devices for use with gas-fired condensing boilers (domestic scale)   | BSM.3             | C.3                  |
| Heating system insulation   | As measure   | BSM.4             | C.4                  |
| Heating, hot water system, air conditioning or ventilation system controls and components | 1. Heating and hot water system controls (domestic)  | BSM.5.1           | C.5                  |
|   | 2. Air conditioning controls   | BSM.5.2           |                      |
|   | 3. Ventilation controls  | BSM.5.3           |                      |
|   | 4. Low energy circulator pumps   | BSM.5.4           |                      |
|   | 5. Low temperature radiators and fan convectors  | BSM.5.5           |                      |
| Hot water systems   | Domestic hot water systems   | BSM.6             | C.6                  |
| Mechanical ventilation with heat recovery   | Domestic ventilation systems with heat recovery  | BSM.7             | C.7                  |
| Under-floor heating   | Hydraulic (wet) systems*   | BSM.8             | C.8                  |
| Warm-air heating  | 1. Natural gas-fired and liquefied petroleum gas-fired warm-air heating systems                                  | BSM.9.1           | C.9                  |
|   | 2. Oil-fired warm-air heating systems  | BSM.9.2           |                      |
|   | <i>NOTE Electric warm-air heating systems are included under the measure electric storage heaters (see D.1).</i> |                   |                      |
| Water efficient taps and showers  | As measure   | BSM.10            | C1.0                 |



**Table A.3 – Category BSE (Building Services Electrical)**

| Measure  | Measure type  | Measure reference | Current annex clause |
|--|---|-------------------|----------------------|
| Electric storage heaters (including electric warm-air heating units that incorporate heat storage) | 1. Electric storage heaters                                 | BSE.1.1           | D.1                  |
|  | 2. Electric storage heaters with warm-air heat distribution | BSE.1.2           |                      |
| Light fittings, lighting systems and lighting system controls                                      | As measure  | BSE.2             | D.2                  |

### A.3 Explanation of PAS 2030 measure-specific annex referencing system

EEMs included in PAS 2030 are organized in three groups, building fabric measures (BFM), building services mechanical (BSM) and building services electrical (BSE). These groups are each presented in an annex referenced as Annex B for BFM, Annex C for BSM and Annex D for BSE. Within these annexes, the related measures are each allocated a separate clause e.g. **B.1**, **B.2**, **B.3**. Referencing within each clause is provided for as follows.

### A.4 Interactions between EEMs

#### A.4.1 Introduction

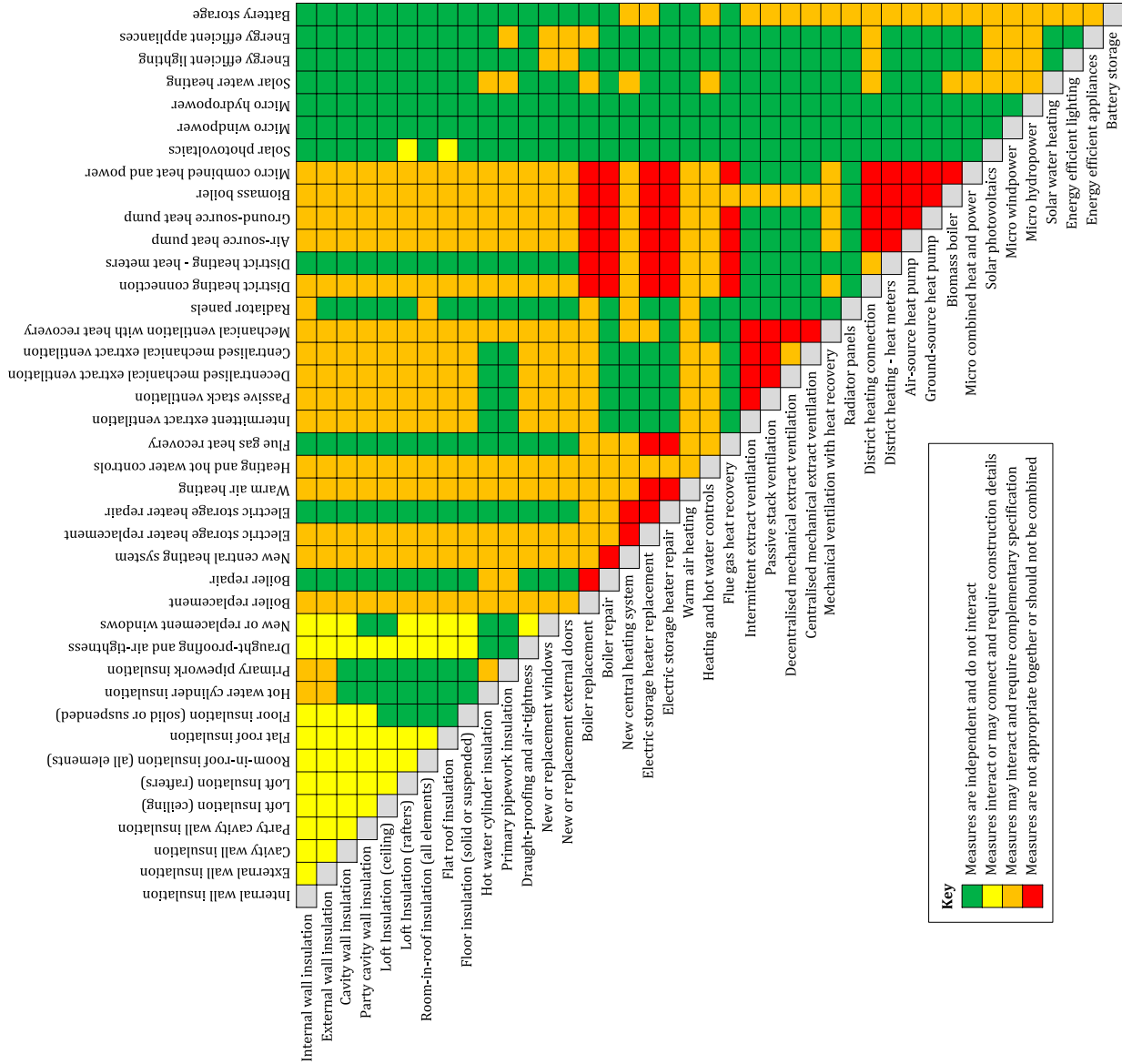
When EEMs are installed in any existing dwelling it is essential to take account of the fact that some measures can impact upon the performance of other measures or can themselves be impacted by those measures. There are also EEM that when installed in a dwelling without the correct level of care can significantly impair the functionality of the dwelling.

#### A.4.2 The Measures Interaction Matrix

Figure A.1 (which also appears in PAS 2035:2023) provides information about the nature of relationships between co-installed EEMs, identifying measures that are independent and do not interact, with measures that are not appropriate together and should not be combined. Other intermediate relationships (e.g. when a construction detail is required for an interface) are also identified. PAS 2035:2023 specifies that these relationships shall be taken into account by the Retrofit Designer when developing the retrofit design.

For this reason, PAS 2035:2023 emphasizes the need for the Retrofit Designer to make adequate provision for the interfaces between the EEMs in the retrofit design. PAS 2030 also imposes responsibilities on Retrofit Installers of EEMs to be alert to these potential issues and to closely follow the retrofit design. This extends to the requirement for Retrofit Installers to adhere to such matters during the pre-installation building inspection and to refer to the Retrofit Coordinator any issues that have been adequately provided for in the retrofit design.

Figure A.1 – PAS 2030 and PAS 2035:2023 The Measures Interaction Matrix (Version G, 11 November 2018)



## A.5 Avoidance of thermal bridging and infiltration

As required in 5.2.1, Retrofit Installers shall verify that the retrofit design provided by the Retrofit Designer includes construction details for eliminating thermal by-pass and minimizing thermal bridging at corners, junctions and edges of insulation layers either occurring as a consequence of geometry or resulting from discontinuity of the insulation or from insulation being thinner than in the adjacent area (e.g. around meter boxes, etc.).

**NOTE 1** *These construction details should be based on accepted industry guidance or standards. e.g. External Wall Insulation Specification for Weathering and Thermal Bridge Control [N2] (see 10.7.1) Alternatively, temperature factors for construction details should be calculated in accordance with BRE Information Paper IP1/06 [5]. Temperature Factors ( $f_{R3}$ ) should be not less than 0.75.*

Where the retrofit design does not include construction details for eliminating thermal by-pass and minimizing thermal bridging the Retrofit Installer shall obtain confirmation from the Retrofit Coordinator that this was intentional.

**NOTE 2** *The Retrofit Coordinator should provide in writing valid reasons why no such detail is required; the cost of preparing or constructing such details is not a valid reason.*

Where the retrofit design does not include construction details for a continuous air barrier, the Retrofit Installer shall obtain confirmation from the Retrofit Coordinator that this was intentional.

**NOTE 3** *An air barrier is not necessarily a membrane, but can be formed of other materials such as plaster (including insulated plaster), render, concrete, screed, air tightness board and airtight paint. In some cases, as the air barrier might be vapour-permeable in accordance with a vapour-open retrofit design, it is important that the air barrier material is not switched for vapour-impermeable alternative.*

# Annex B (normative) BFM energy efficiency measures

## B.1 Measure BFM.1 – Cavity wall insulation including that installed in party walls

**B, C, D** There are three annexes each presenting a single category of energy efficiency measures (e.g. *BFM, BSM, and BEM*).

**B.1, B.2, C.1, D.1 etc.** – Measure-specific clause reference, presented alongside title.

**B.1.1, B.1.2, B.1.3 etc.** – Measure focussed requirements clauses within each clause B1.

**Table B.1** – Table of required technical, competence and other requirements for clause B1.

**B1-11, B1-12, B1-13 B1-14 etc.** – line references within the Table B.1.

### B.1.1 Additional installation requirements

When installing cavity wall insulation, in addition to meeting the core requirements set out in Clauses 4 to Clause 10, the Retrofit Installer shall comply with any standards, specifications, instructions or guidance identified in B1-11 of Table B.1.

### B.1.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the cavity wall insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B1-12 of Table B.1.

### B.1.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of cavity wall insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B1-13 of Table B.1.

### B.1.4 Operative competence

When installing cavity wall insulation, the Retrofit Installer shall only employ or contract operatives with the required level of qualification attained through one of the permitted routes (B1-14 of Table B.1), with competence currency specified in B1-15 of Table B.1 at the competency ratio specified in B1-16 of Table B.1.

### B.1.5 Provision of information in respect of cavity wall insulation

The Retrofit Installer shall provide information identified at B1-17 of Table B.1 to the client as part of the handover process required in 6.9.

**Table B.1** – Measure-specific requirements for cavity wall insulation (BFM.1)

| Measure description  | Cavity wall insulation including that installed in party walls  |
|--|---|
| Measure type   | As measure description (no sub-division)  |
| <b>B1-11</b> Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement.</p> <p>The Retrofit Installers responsibilities include preparation of the site and finishing work, incorporating:</p> <ul style="list-style-type: none"> <li>• identification of essential ventilation openings that require sleeving or safeguarding before installation;</li> <li>• the position of all flues whether or not they are in service and measures that shall be taken to safeguard their proper functioning; and</li> <li>• verifying that upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings and flues.</li> </ul> <p><b>NOTE 1</b> Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body. The Installer should be aware that training from the supplier or training acceptable to the supplier might be necessary before an application for assessment/certification is made to a certification body.</p> |

Table B.1 – (continued)

|   |  |
|---|--|
|   | <p><b>NOTE 2</b> Attention is drawn to the need for all cavity wall insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> <p><b>NOTE 3</b> Where the installation is to include party walls, and the Retrofit Installer is not responsible for any necessary notices or agreements in respect of the work have been issued then the Retrofit Installer should confirm with the Retrofit Designer that any necessary notice of work to be undertaken has been issued (e.g. any notice required under the Party Wall etc. Act 1996 [11]).</p>   |
| <p><b>B1-12</b> Pre-installation building inspection requirements</p> | <ol style="list-style-type: none"> <li>1) As a minimum the Retrofit Installer shall: <ul style="list-style-type: none"> <li>• investigate and determine if the CWI installation work:</li> <li>• results in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture;</li> <li>• results in unsafe operation of a combustion appliances;</li> <li>• compromises the functionality of existing ventilation ducts/systems; and</li> <li>• compromise the functionality and/or safety of existing services (gas, electric, water, telephone, etc.);</li> <li>• identify:</li> <li>• if the proposed installation would be non-compliant with any requirements stated by the supplier;</li> <li>• if the type and condition of the dwelling structure is suitable for the works to commence;</li> <li>• the extent of the cavity to be filled;</li> <li>• if the site layout or conditions will impair the execution of the works; and</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> </ul> </li> <li>2) The Retrofit Installer shall verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see <b>B1-13</b>) prior to commencement of installation; <ul style="list-style-type: none"> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall: <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the CWI; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for cavity wall insulation, that has the features listed in <b>B.1</b> of PAS 2035:2023.</li> </ul> </li> <li>3) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</li> </ol> |

Table B.1 – (continued)

| Installation role   | The Retrofit Installer shall verify evidence of vocational competence for the listed roles as follows:  |
|---|---|
| B1-13 Building inspector  | Vocational competence as defined in 3.27 of this PAS.   |
| B1-14 Operative, (threshold)  | Vocational competence is being acquired as defined in 3.28.   |
| Operative, (specialist)   | Vocational competence as defined in 3.27.   |
| B1-15 Competence currency   | To be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| B1-16 Competence ratio  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a higher competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| B1-17 Measure-specific information to be handed over to the client in addition to 6.9 | <p>The Retrofit Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>• details of safe use and maintenance of the cavity wall insulation system, as specified by the supplier;</li> <li>• any relevant product warranty information and guarantees; and</li> <li>• Building Regulations compliance certificate where appropriate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).</li> </ul>   |

## B.2 Measure BFM.2 – Draught proofing

### B.2.1 Additional installation requirements

When installing draught proofing, in addition to meeting the core requirements set out in Clause 4 to Clause 10 the Retrofit Installer shall comply with any standards, specifications, instructions or guidance identified in B2-11 of Table B.2.

### B.2.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the draught proofing at location the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B2-12 of Table B.2.

### B.2.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of draught proofing, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B2-13 of Table B.2.

### B.2.4 Operative competence

When installing draught proofing, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B2-14 of Table B2), with competence currency specified in B2-15 of Table B.2 at the competency ratio specified in B2-16 of Table B.2.

### B.2.5 Provision of information in respect of draught proofing

The Retrofit Installer shall provide information identified at B2-17 of Table B.2 to the client as part of the handover process required in 6.9.

**Table B.2 – Measure-specific requirements for draught proofing (BFM.2)**

| Measure description  | Draught proofing  |
|--|---|
| <b>Measure type</b><br>As measure (no sub-division)  | As measure (no sub-division)  |
| <b>B2-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement. The Retrofit Installers responsibilities include preparation of the site and finishing work.</p> <p>When fitting draught-stripping products as a retrofit measure to hinged doors in wood, sliding windows in wood, hinged windows in wood and steel and domestic loft hatches, in houses that were not originally designed to incorporate draught-stripping, Retrofit Installers shall use products meeting the requirements of BS 7386 working in accordance with BS 7880.</p> <p><i>NOTE 1 Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body with respect to the product/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier might be necessary before an application for assessment/certification is made to a certification body.</i></p> <p><i>NOTE 2 Attention is drawn to the need, where relevant, for all draught proofing installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</i></p> |

Table B.2 – (continued)

|                                 |   |  |
|---------------------------------|---|--|
| B2-12                           | <p><b>Pre-installation building inspection requirements</b></p>                               | <p>The Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• pre-existing damage to the areas that are accessed by the installation operatives;</li> <li>• the extent of the area and elements to be draught-proofed;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the condition of the elements to be draught-proofed is suitable for the works to commence in relation to: <ul style="list-style-type: none"> <li>• timbers free from rot and/or infestation;</li> <li>• metal components being free from visible signs of corrosion; and</li> <li>• the surfaces that are to receive draught-proofing materials being free from grease, etc.;</li> </ul> </li> <li>• if the proposed installation would: <ul style="list-style-type: none"> <li>• be non-compliant with any requirements stated by the Retrofit Designer;</li> <li>• compromise the functionality of existing ventilation systems in relation to air movement within the dwelling; and</li> <li>• result in unsafe operation of combustion appliances (combustion ventilation and or cooling ventilation);</li> </ul> </li> <li>• if the site layout or conditions might impair the execution of the works in relation to appropriate access to the property and to the elements to be draught-proofed; and</li> <li>• if the installation to be undertaken would result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture.</li> </ul> |
| <p><b>Installation role</b></p> |   | <p><b>Vocational competence required</b></p>   |
| B2-13                           | <p><b>Building Inspector</b></p>  | <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| B2-14                           | <p><b>Operative, (threshold)</b></p>  | <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.</p>  |
| B2-14                           | <p><b>Operative, (specialist)</b></p>   | <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| B2-15                           | <p><b>Competence currency</b></p>   | <p>To be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.</p>   |
| B2-16                           | <p><b>Competence ratio</b></p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Installer in relation to the:</p> <ol style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ol> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied. For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p>  |
| B2-17                           | <p><b>Measure-specific information to be handed over to the client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>• any relevant product warranty information and guarantees.</li> </ul>  |



## B.3 Measure BFM.3 – Energy efficient glazing and doors including replacement Insulating Glass Units (IGU)

### B.3.1 Additional installation requirements

When installing energy efficient glazing and doors, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall comply with any standards, specifications, instructions or guidance identified in B3-11 of Table B.3.

### B.3.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the energy efficient glazing and doors at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance, as a minimum, with the requirements set out in B3-12 of Table B.3.

### B.3.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of energy efficient glazing and doors, the Retrofit Installer shall employ or contract only an inspector meeting the competence requirements of B3-13 of Table B.3.

### B.3.4 Operative competence

When installing energy efficient glazing and doors, the Retrofit Installer shall employ or contract only operatives with the required level of competence attained through one of the permitted routes (B3-14 of Table B.3), with competence currency specified in B3-15 of Table B.3 at the competency ratio specified in B3-16 of Table B.3.

### B.3.5 Provision of information in respect of energy efficient glazing and doors

The Retrofit Installer shall provide information identified at B9-17 of Table B.9 to the client as part of the handover process required in 6.9.

**Table B.3 – Measure-specific requirements for energy efficient glazing and doors (BFM.3)**

| Measure description   | Energy efficient glazing and doors including replacement insulating glass units (IGU)  |
|---|--|
| <b>Measure type</b>   | As measure description (no sub-division)   |
| <b>B3-11 Additional installation requirements to those in the core of this PAS (Clauses 4 to Clause 10)</b> | <p>Where relevant to the work to be undertaken, the Retrofit Installers shall take account of the guidance and information provided by:</p> <ul style="list-style-type: none"> <li>• BS 8213-4;</li> <li>• BS 6262-2;</li> <li>• BS 6262-3;</li> <li>• BS 6262-4;</li> <li>• BS 6262-6;</li> <li>• BS 6262-7; and</li> <li>• BS 8000-7.</li> </ul> <p><b>NOTE 1</b> Attention is drawn to the need for all energy efficient glazing and doors work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation; conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> <p><b>NOTE 2</b> For IGU replacements only safety glazing requirements are applicable.</p> |

Table B.3 – (continued)

|   |  |
|---|--|
| <p><b>B3-12</b> Pre-installation building inspection requirements</p>                               | <p>1) The Retrofit Installer shall investigate and report:</p> <ul style="list-style-type: none"> <li>• review of contract;</li> <li>• measurement check, include fire egress*;</li> <li>• assessment of structure*;</li> <li>• check for asbestos*;</li> <li>• safety glazing requirements;</li> <li>• requirements relating to fire-resistant glazing;</li> <li>• ventilation requirements;</li> <li>• check render and decorations condition*;</li> <li>• user access requirements (e.g. disabled access);</li> <li>• specialist access equipment; and</li> <li>• explanation to existing owner.</li> </ul> <p><b>NOTE *</b> indicates that this task is not applicable to IGU replacement.</p> <p>2) The Retrofit Installer shall investigate and assess if the installation to be undertaken would result in non-compliance with the Building Regulations, e.g. in relation to workmanship, materials, structural stability, fire safety, resistance to moisture.</p>   |
| <p><b>Installation role</b></p>   | <p>Vocational competence required</p>  |
| <p><b>B3-13</b> Building Inspector</p>  | <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>B3-14</b> Operative (threshold)</p>   | <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.</p>  |
| <p><b>Operative (specialist)</b></p>  | <p>Shall demonstrate vocational competence as defined in 3.26.</p>   |
| <p><b>B3-15</b> Competence currency</p>   | <p>Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.</p>  |
| <p><b>B3-16</b> Competence ratio</p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative per team of four operatives. For each installation, the vocational competence ratio over and above this minimum shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken;</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> It is recommended that vocationally competent operatives carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <p><b>B3-17</b> Measure-specific information to be handed over to the client in addition to 6.9</p> | <p>The Retrofit Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days);</li> <li>• relevant operating, maintenance, safety and security documentation relevant to the installation; and</li> <li>• any relevant product warranty information and guarantees.</li> </ul>   |

## B.4 Measure BFM.4 – External wall insulation

### B.4.1 Additional installation requirements

When installing external wall insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B4-I1 of Table B.4.

### B.4.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the external wall insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance, as a minimum, with the requirements set out in B4-I2 of Table B.4.

### B.4.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of external wall insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B4-I3 of Table B.4.

### B.4.4 Operative competence

When installing external wall insulation, the Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B4-I4 of Table B.4), with competence currency specified in B4-I5 of Table B.4, at the competency ratio specified in B4-I6 of Table B.4.

### B.4.5 Provision of information in respect of external wall insulation

The Retrofit Installer shall provide information identified at B4-I7 of Table B.4 to the client as part of the handover process required in 6.9.

**Table B.4 – Measure-specific requirements for external wall insulation (BFM.4)**

| Measure description   | External wall insulation  |  |
|---|---|--|
| Measure type  | BFM.4.1   | Site rendered external wall insulation systems |
| B4-I1   | BFM.4.2   | Pre-finished external wall insulation systems  |
| Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>Due to the high risk of thermal by-pass rendering the insulation ineffective, external wall insulation shall not be installed on walls of cavity construction that have unfilled cavities or have had cavity wall insulation removed and not replaced, unless the cavities have been sealed in accordance with specifications and construction details provided by the Retrofit Designer (see PAS 2035:2023 for further details).</p> <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement. In undertaking the installation, the Retrofit Installer's responsibilities shall include:</p> <p>a) before installation starts, confirming that the retrofit design has made provision for:</p> <ul style="list-style-type: none"> <li>the EWI system provided for installation is that recommended by the pre-design building survey and specified by the retrofit design;</li> <li>wind loads have been calculated and taken into account in the fixing requirements;</li> <li>all essential ventilation openings that require sleeving or safeguarding before installation are located and identified;</li> <li>the position of all flues whether or not they are in service is determined and the measures that shall be taken to safeguard their proper functioning is determined;</li> </ul> |  |

Table B.4 – (continued)

- any existing cables, pipework, ducting etc. that require it are removed or repositioned as/where necessary to accommodate the planned EWI system, with authorization from the relevant responsible body (where required) and undertaken by a person competent to undertake such work; the existing ground levels, paths or decking adjacent to the dwelling are 150 mm below the level of the damp proof course; and
  - other areas of the dwelling and surrounding area that could be at risk during installation are adequately protected to ensure they are not damaged; and in the event that any of these aspects is not adequately covered, liaising with the Retrofit Designer to provide for their undertaking.
- b) During installation, verifying that:
- all work is carried out in accordance with the site-specific retrofit design, drawings and method statement and that work is not permitted to progress unless copies of the site-specific specification documentation are accessible at location and all operatives are aware of the content and requirements relevant to their designated activities;
  - the system and all detailed interfaces with other parts of the dwelling or other planned EEMs to be undertaken in a manner and sequenced such, that all measures are fully effective, with optimized performance and junctions that are safe, durable and fully weatherproof for all expected exposure conditions. e.g. interface between EWI system and planned replacement windows; and
  - whether or not specifically required by the retrofit design, the items listed in i) to viii) below are given particular attention with regard to the efficacy and durability of the detail especially concerning the management and/or exclusion of moisture and/or the risk of fabric moisture accumulation, surface/interstitial condensation or rising damp. Mastic sealants shall always be supported by a primary seal below, and all details shall be fully weatherproof:
    - i) system base detail (including below dpc);
    - ii) interfaces with roofs at eaves and verges (where metal or plastic cappings and trims shall not be used); unless these are detailed within the document *External wall insulation specification for weathering and thermal bridge control* [N2] (see 10.7.1);
    - iii) window/door reveals/heads;
    - iv) system/cill interfaces (incl. overhang requirements/weepholes/thermal movement);
    - v) surface fixtures (structurally sound);
    - vi) penetrations through the system;
    - vii) interfaces with roof soffits, flat roofs, conservatory roofs etc.; and
    - viii) detailing and sealing around vents/flues, meters and other heating related structures/pipework.
  - all weather seals at the interface between EWI systems and other structures/finishes are installed with particular attention given to the soundness/cleanliness of contact surfaces, continuity and effectiveness around corners, bond to surfaces and the durability of the water seal;

Table B.4 – (continued)

- all details are installed to minimize the risks of thermal bridging, removing/relocating/extending to allow continuity of insulation in all cases e.g. rooflines, meter boxes, pipework, flues, ducts;
- photographic evidence of key stages of the installation is prepared and retained for the period of the guarantee, including close up photographs of representative examples of all moisture and thermally sensitive details; installations are undertaken in accordance with the specification for the installation of external wall insulation verifying the safety and operation of fuel burning appliances, taking account of the recommendations provided in the document *external wall insulation specification for weathering and thermal bridge control* [N2] (see 10.7.1);
- ventilation of the dwelling is assessed and if necessary upgraded in accordance with the retrofit design and with the requirements of PAS 2035:2023; and
- upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings and flues.

**NOTE 1** Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier is necessary before an application for assessment/certification is made to a certification body.

**NOTE 2** Attention is drawn to the need, where relevant, for all external wall insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-5 [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].

Table B.4 – (continued)

|  |   |
|--|---|
| <p><b>B4-12</b> Measure-specific pre-installation building inspection requirements supplementary to those in the core (Clause 7.2)</p> | <p>1) In meeting the requirements specified in Clause 7.2, the designated competent person shall confirm that:</p> <ol style="list-style-type: none"> <li>a) Full and detailed pre-design building assessment had been undertaken by a competent person (see B4-13 of this Table), prior to the retrofit design being undertaken; and</li> <li>b) The retrofit design relevant to the installation under inspection has been produced in accordance with Clause 5 of this PAS taking full account of the findings and recommendations of the pre-design building assessment, including:             <ul style="list-style-type: none"> <li>• thermal performance calculations;</li> <li>• moisture risk analysis;</li> <li>• ventilation requirements and standard/bespoke drawing details;</li> <li>• the main components of the system including the fixing type/method, the insulation type and thickness, the joint details and specifications, the reinforcing coat and type of reinforcement and the finish;</li> <li>• the proposed details for the main interfaces; (thermal bridging, meter boxes, reveals, roofline joists, party walls, base detail with particular reference to below dpc, base/floor details, seals at windows/doors, seals to penetrations, light fittings, sockets, fixing and sealing of surface mounted structures, interfaces with ceilings, interfaces with roof, junctions between the system and other finishes and/or other EEM) clearly demonstrate how the installation would avoid interstitial moisture risks particularly at moisture sensitive locations such as embedded timbers (e.g. timber joist ends) as well as surface condensation; and</li> <li>• the installation to the retrofit design is practical and achievable given the particular EWI system chosen for the project and the specific dwelling construction, site conditions and other EEMs planned for the property. (See also the Measures Interaction Matrix in Figure A.1).</li> </ul> </li> </ol> <p>2) As a minimum the Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• investigate and assess if the EWI installation work:             <ul style="list-style-type: none"> <li>• results in non-compliance with the Building Regulations, e.g. in relation to workmanship, materials, structural stability, fire safety;</li> <li>• provides resilience to moisture. Where possible, any areas of non-compliance shall be rectified by selection of another solution/detail, which shall be documented in the pre-installation building inspection and all contract documentation amended accordingly i.e. specification, drawings, method statement;</li> <li>• results in avoidable thermal bridging; where thermal bridging is avoidable by adaptation of the detail, such measures shall be taken and the contract documents amended to suit. Design details shall be such that they incorporate additional capacity, that for example, would provide water management within the system should surface or interstitial condensation occur;</li> <li>• results in unsafe operation of combustion appliances; unless an alternative safe detail can be found, EWI works shall not progress in the area causing the unsafe operation;</li> <li>• compromises the functionality of existing ventilation ducts/systems; unless an alternative safe detail can be found, EWI works shall not progress in the area causing the unsafe operation;</li> <li>• compromises the functionality and/or safety of existing services (gas, electric, water, telephone, etc.); unless an alternative safe detail can be found, EWI works shall not progress in the area causing the unsafe operation; and</li> <li>• results in the proposed installation being non-compliant with any requirements of the EEM supplier or of the retrofit design.</li> </ul> </li> </ul> |
|--|---|

Table B.4 – (continued)

|                                     |  |
|-------------------------------------|--|
|                                     | <ul style="list-style-type: none"> <li>include confirmation that the condition of the substrate is suitable for the works to commence and where all or any of the substrate does not fulfil the requirements for installation, preparation of proposals for adaptations to be made or additional preparation undertaken that will be necessary in order that works can commence.</li> <li>verify that all instances of potential non-compliance identified in the pre-installation building inspection shall be documented and referred to the Retrofit Coordinator for resolution. Any design adjustments, special adaptations and/or additional preparation requirements shall be confirmed as acceptable in writing, by the system supplier and/or the Retrofit Coordinator.</li> <li>amend the retrofit design documentation to include any specified changes to the installation, the installation method statement modified accordingly and the pre-installation building inspection records updated to provide documentary evidence that the intended modified installation will address all the issues identified in the pre-installation building inspection and meets the requirements of all parties.</li> </ul> <p><b>NOTE</b> In undertaking pre-installation building inspections it is recommended that Retrofit Installers use an industry recommended checklist (see 10.7.1).</p> <p>3) The Retrofit Installer shall</p> <ul style="list-style-type: none"> <li>verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B4-13) prior to commencement of installation;</li> <li>a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>the person undertaking the independent checks and inspection shall: <ul style="list-style-type: none"> <li>be independent of the inspector or the Retrofit Installer of the EWI; and</li> <li>not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>verify that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for external wall insulation, that has the features listed in B.1 of PAS 2035:2023.</li> </ul> <p>4) The Retrofit Installer shall confirm that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p> |
| <b>Installation role</b>            | <b>Vocational competence required</b>  |
| <b>B4-13 Building Inspector</b>     | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B4-14 Operative, (threshold)</b> | Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
| <b>Operative, (specialist)</b>      | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B4-15 Competence Currency</b>    | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |

Table B.4 – (continued)

|   |   |
|---|---|
| <p><b>B4-16</b>      <b>Competence ratio</b></p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised;</li> </ul> <p>but shall not be less than one carded operative per team of 4 (1 to 3), at the specified installation location at any time.</p> <p><i>NOTE 1 Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competence ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><i>NOTE 2 It is recommended that vocationally competent operatives carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p> |
| <p><b>B4-17</b>      <b>Measure-specific information to be handed over to the client in addition to 6.9</b></p> | <ul style="list-style-type: none"> <li>• The user manual shall include details on fixing to the system, drilling or cutting the system, repairs to damaged areas, avoiding damage (e.g. ladders), cleaning recommendations, importance of weather seals, name/contact details of both the Installer and system certificate holder, materials specification (name, colours etc.) and guidance on living in a highly insulated property, including the need for appropriate ventilation. The contents of the manual shall be explained to the client (not just left with them).</li> <li>• Where end-user maintenance is possible, details of how to undertake the maintenance including frequency and any product or tools that shall be used and where to obtain the required products and tools.</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).</li> <li>• It shall be explained to the client that repairs should be carried out by a competent person, but that maintenance is their responsibility.</li> <li>• Any relevant product warranty information and guarantees shall be included in the handover.</li> </ul>   |



## B.5 Measure BFM.5 – Flat roof insulation

### B.5.1 Additional installation requirements

When installing flat roof insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B5-11 of Table B.5.

### B.5.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the flat roof insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B5-12 of Table B.5.

### B.5.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of flat roof insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B5-13 of Table B.5.

### B.5.4 Operative competence

When installing flat roof insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B5-14 of Table B.5), with competence currency specified in B5-15 of Table B.5 at the competency ratio specified in B5-16 of Table B.5.

### B.5.5 Provision of information in respect of flat roof insulation

The Retrofit Installer shall provide information identified at B5-17 of Table B.5 to the client as part of the handover process required in 6.9.

**Table B.5 – Measure-specific requirements for flat roof insulation (BFM.5)**

| Measure description   | Flat roof insulation   |
|---|--|
| <b>Measure type</b>   | As measure description (no sub-divisions)  |
| <b>B5-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10).</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement. The Retrofit Installer's responsibilities shall include preparation of the site and finishing work incorporating:</p> <ul style="list-style-type: none"> <li>• identification of essential ventilation openings that require sleeving or safeguarding before installation;</li> <li>• the position of all flues whether or not they are in service and measures that shall be taken to safeguard their proper functioning and to prevent combustion of all newly installed adjacent materials; and</li> <li>• verifying that upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings and flues.</li> </ul> <p><b>NOTE 1</b> Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier of the insulation and where applicable the waterproofing products may be necessary before an application for assessment/certification is made to a certification body.</p> <p><b>NOTE 2</b> Attention is drawn to the need, where relevant, for all flat roof insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> |

Table B.5 – (continued)

|   |   |
|---|---|
| <p><b>B5-12</b>    <b>Pre-installation building inspection requirements</b></p> | <p>1) As a minimum the Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• pre-existing damage to the areas that will be accessed by the installation operatives;</li> <li>• the extent of the area and elements to be insulated;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the condition of the roof is suitable for the works to commence in relation to:             <ul style="list-style-type: none"> <li>• existence of appropriate roof internal ventilation arrangements;</li> <li>• the roof build up being free from rodents/pests and protected species, e.g. bats;</li> <li>• timbers free from rot and/or infestation;</li> <li>• the condition of the ceiling (if applicable);</li> </ul> </li> <li>• metal structural roof members being free from visible signs of corrosion;</li> <li>• electrical wiring is free from visible defects, e.g. damaged cables, trailing cables, exposed conductors;</li> <li>• no visible signs of water penetration;</li> <li>• no visible signs of leakage from water system components, e.g. pipework             <ul style="list-style-type: none"> <li>• if the proposed installation would:                 <ul style="list-style-type: none"> <li>• be non-compliant with any requirements stated by the designer/ specifier;</li> <li>• compromise the functionality of existing air supply/extract ventilation ducts/systems; and</li> <li>• result in unsafe operation of a combustion appliances.</li> </ul> </li> </ul> </li> <li>• if the site layout or conditions will impair the execution of the works in relation to appropriate access to the property and to the elements to be insulated; and</li> <li>• if the installation to be undertaken will result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture.</li> </ul> <p>2) The Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see <b>B5-13</b>) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall:             <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the flat roof insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>• verify that a recognised pre-notification process has been undertaken under an industry quality assurance scheme for flat roof insulation, that has the features listed in <b>B.1</b> of PAS 2035:2023.</li> </ul> <p>3) The Retrofit Installer shall confirm that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p> |
|---|---|

Table B.5 – (continued)

| Installation role  | Vocational competence required   |
|--|--|
| <b>B5-13</b> Building Inspector  | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B5-14</b> Operative, (threshold)  | Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
| <b>B5-14</b> Operative, (specialist)   | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B5-15</b> Competence currency   | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| <b>B5-16</b> Competence ratio  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>• range, scale geographical spread and complexity of the work being undertaken; and</li> <li>• supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it may be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency for production upon request.</p> |
| <b>B5-17</b> Measure-specific information to be handed over to the client in addition to 6.9 | <p>The Retrofit Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days); and</li> <li>• any relevant product warranty information and guarantees.</li> </ul>   |

## B.6 Measure BFM.6 – Floor insulation

### B.6.1 Additional installation requirements

When installing floor insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply to any standards, specifications, instructions or guidance identified in B6-11 of Table B.6.

### B.6.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the floor insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B6-12 of Table B.6.

### B.6.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of floor insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B6-13 of Table B.6.

### B.6.4 Operative competence

When installing floor insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B6-14 of Table B.6), with competence currency specified in B6-15 of Table B.6 at the competency ratio specified in B6-16 of Table B.6.

### B.6.5 Provision of information in respect of floor insulation

The Retrofit Installer shall provide information identified at B6-17 of Table B.6 to the client as part of the handover process required in 6.9.

**Table B.6 – Measure-specific requirements for floor insulation (BFM.6)**

| Measure description  | Floor insulation   |
|--|--|
| <b>Measure type</b>  | As measure description (no sub-division)   |
| <b>B6-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement.</p> <p><i>NOTE 1 Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the productsystem to be installed, against UK requirements and regulation and the Installer should be aware that training from the supplier or training acceptable to the supplier may be necessary before an application for assessment/ certification is made to a certification body.</i></p> <p><i>NOTE 2 Attention is drawn to the need, where relevant, for all floor insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England and Wales is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</i></p> |

Table B.6 – (continued)

|  |  |
|--|--|
| <b>B6-12</b> Pre-installation building inspection requirements | <ol style="list-style-type: none"> <li>1) As a minimum the Retrofit Installer shall investigate and determine:           <ul style="list-style-type: none"> <li>• pre-existing damage to the areas that will be accessed by the installation operatives;</li> <li>• the extent of the area and elements to be insulated;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the condition of the floor structure and the sub-floor void is suitable for the works to commence in relation to:               <ul style="list-style-type: none"> <li>• existence of appropriate floor void ventilation arrangements;</li> <li>• the under-floor area being free from rodents/pests;</li> <li>• timbers free from rot and/or infestation and with a wood moisture content of &lt;20% kg/kg;</li> <li>• metal structural floor support members being free from visible signs of corrosion;</li> <li>• electrical wiring is free from visible defects, e.g. damaged cables, trailing cables, exposed conductors;</li> <li>• no visible signs of water penetration or water accumulation in the under-floor area; and</li> <li>• no visible signs of leakage from water system components, e.g. pipework;</li> </ul> </li> <li>• if the proposed installation would:               <ul style="list-style-type: none"> <li>• be non-compliant with any requirements stated by the designer/specifier;</li> <li>• compromise the functionality of existing air supply/extract ventilation ducts/systems; and</li> <li>• result in unsafe operation of combustion appliances (floor vents, etc.);</li> </ul> </li> <li>• if the site layout or conditions will impair the execution of the works in relation to:               <ul style="list-style-type: none"> <li>• appropriate access to the property and to the floor to be insulated; and</li> <li>• the room being free from stored items, floor coverings, etc.;</li> </ul> </li> <li>• if the installation to be undertaken will result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resilience to moisture.</li> </ul> </li> <li>2) The Retrofit Installer shall           <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see <b>B6-13</b>) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall:               <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the floor insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>• verify that a recognised pre-notification process has been undertaken under an industry quality assurance scheme for floor insulation, that has the features listed in <b>B.1</b> of PAS 2035:2023.</li> </ul> </li> <li>3) The Retrofit Installer shall confirm that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</li> </ol> |
|--|--|

Table B.6 – (continued)

| Installation role   | Vocational competence required  |
|---|---|
| <b>B6-13</b><br>Building Inspector  | Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B6-14</b><br>Operative, (threshold)  | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| <b>B6-15</b><br>Operative, (specialist)   | Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B6-15</b><br>Competence currency   | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.  |
| <b>B6-16</b><br>Competence ratio  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B6-17</b><br>Measure-specific information to be handed over to the client in addition to 6.9 | <p>The Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).</li> <li>• any relevant product warranty information and guarantees.</li> </ul>   |

## B.7 Measure BFM 7 – Hybrid wall insulation

### B.7.1 Additional installation requirements

When installing hybrid wall insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B7-11 of Table B.7.

### B.7.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the hybrid wall insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance, as a minimum, with the requirements set out in B7-12 of Table B.7.

### B.7.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of hybrid wall insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B7-13 of Table B.7.

### B.7.4 Operative competence

When installing hybrid wall insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B7-14 of Table B.7), with competence currency specified in B7-15 of Table B.7 at the competency ratio specified in B7-16 in Table B.7.

### B.7.5 Provision of information in respect of hybrid wall insulation

The Installer shall provide information identified at B7-17 of Table B.7 to the client as part of the handover process required in 6.9.

**Table B.7 – Measure-specific requirements for hybrid wall insulation (BFM.7)**

| Measure description  | Hybrid wall insulation   |
|--|--|
| <b>Measure type</b>  | As measure description (no sub-division)   |
| <b>B7-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement.</p> <p>In undertaking the installation, the Retrofit Installer's responsibilities shall include:</p> <ol style="list-style-type: none"> <li>before installation starts, confirming that the retrofit design has made provision for verifying that: <ul style="list-style-type: none"> <li>the HWI system provided for installation is that recommended in the pre-design building survey and specified by the retrofit design;</li> <li>all essential ventilation openings that require sleeving or safeguarding before installation are located and identified;</li> <li>the position of all flues whether or not they are in service is determined and the measures that shall be taken to safeguard their proper functioning is determined;</li> <li>any existing cables, pipework, ducting etc. that require it are removed or repositioned as/where necessary to accommodate the planned EWI system, with authorization from the relevant responsible body (where required) and undertaken by a person competent to undertake such work;</li> <li>other areas of the dwelling and surrounding area that could be at risk during installation are adequately protected to confirm they are not damaged; and</li> <li>in the event that any of these aspects is not adequately covered, liaising with the Retrofit Coordinator to provide for their undertaking;</li> </ul> </li> </ol> |

Table B.7 – (continued)

- b) during installation, verifying that:
- all work is carried out in accordance with the site specific retrofit design, drawings and method statement and that work is not permitted to progress unless copies of the site specific specification documentation are accessible at location and all operatives are aware of the content and requirements relevant to their designated activities;
  - the system and all detailed interfaces with other parts of the dwelling or other planned EEMs to be undertaken in a manner and sequenced such, that all measures are fully effective, with optimized performance and junctions that are safe, durable and fully weatherproof for all expected exposure conditions, e.g. interface between EWI/IWI system and planned replacement windows;
  - whether or not specifically required by the retrofit design, the items listed in i) to ix) below are given particular attention with regard to the efficacy and durability of the detail especially concerning the management and/or exclusion of moisture and/or the risk of fabric moisture accumulation, surface/interstitial condensation or rising damp. Mastix sealants shall always be supported by a secondary seal and all details shall be fully weatherproof:
    - i) system base detail (including below Damp Proof Course (DPC));
    - ii) window/door reveals/heads;
    - iii) junctions of internal solid wall insulation with intermediate floors and suspended ground floors;
    - iv) locations where the thickness of internal wall insulation is reduced;
    - v) system/cill interfaces (incl. overhang requirements/weepholes/thermal movement);
    - vi) surface fixtures (structurally sound);
    - vii) penetrations through the system;
    - viii) interfaces with roof soffits, flat roofs, conservatory roofs etc.; and
    - ix) detailing and sealing around vents/flues, meters and other heating related structures/pipework.
  - all weather seals at the interface between HWI systems and other structures/finishes are installed with particular attention given to the soundness/cleanliness of contact surfaces, continuity and effectiveness around corners, bond to surfaces and the durability of the moisture seal;
  - all details are installed to minimize thermal bridging, removing/relocating/extending to allow continuity of insulation in all cases where feasible e.g. rooflines, meter boxes, pipework, flues, ducts;
  - photographic evidence of key stages of the installation is prepared and retained, including close up photographs of representative examples of all moisture and thermally sensitive details;
  - all installations are in accordance with industry good practice. Where conflict with the requirements of this PAS exists, this PAS takes precedence;
  - ventilation of the dwelling is no worse following the installation of the measure than prior to the installation of the measure (this may require additional ventilation); and
  - upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings and flues.

**NOTE 1** Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier may be necessary before an application for assessment/certification is made to a certification body.



Table B.7 – (continued)

|  |  |
|--|--|
|  | <p><b>NOTE 2</b> Attention is drawn to the need, where relevant, for all hybrid wall insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p>   |
| <p><b>B7-12</b> Measure-specific pre-installation building inspection requirements supplementary to those in the core of this PAS (Clause 7.2)</p> | <p>1) In meeting the requirements specified in Clause 7.2 of this PAS, the Retrofit Installer shall confirm that:</p> <ol style="list-style-type: none"> <li>a) a full and detailed pre-design building assessment had been undertaken by a competent person (see B7-13 of this Table), prior to the retrofit design being undertaken;</li> <li>b) the retrofit design relevant to the installation under inspection has been produced in accordance with Clause 4 of this PAS taking full account of the findings and recommendations of the pre-design building assessment, including: <ul style="list-style-type: none"> <li>• thermal performance calculations;</li> <li>• moisture risk analysis;</li> <li>• ventilation requirements and standard/bespoke drawing details;</li> <li>• the main components of the system including the fixing type/method, the insulation type and thickness, breather membrane vapour control layer (if required), board type and jointing and the finish;</li> <li>• the proposed details for the main interfaces; (thermal bridging, meter boxes, reveals, roofline joists, party walls, base detail with particular reference to below dpc, base/floor details, seals at windows/doors, seals to penetrations, light fittings, sockets, fixing and sealing of surface mounted structures, interfaces with suspended floors, intermediate floors and ceilings, interfaces with roof, junctions between the system and other finishes and/or other EEM) clearly demonstrate how the installation will avoid interstitial moisture risks particularly at moisture sensitive locations such as embedded timbers (e.g. timber joist ends) as well as surface condensation; and</li> <li>• the installation to the retrofit design is practical and achievable given the particular HWI system chosen for the project and the specific dwelling construction, site conditions and other EEMs planned for the property. (See also Measures interaction Matrix Figure A.1).</li> </ul> </li> </ol> <p>2) The Retrofit Installer shall investigate and assess if the HWI installation work:</p> <ul style="list-style-type: none"> <li>• results in non-compliance with the Building Regulations, e.g. in relation to workmanship, materials, structural stability, fire safety;</li> <li>• manages moisture. Any areas of non-compliance shall be rectified by selection of another solution/ detail, which shall be documented in the pre-installation building inspection and all contract documentation amended accordingly i.e. specification, drawings, method statement;</li> <li>• results in avoidable thermal bridging; where thermal bridging is avoidable by adaptation of the detail, such measures shall be taken and the contract documents amended to suit. Design details shall be such that they incorporate additional capacity, that for example, will provide water management within the system should surface or interstitial moisture accumulation or condensation occur;</li> <li>• results in unsafe operation of combustion appliances; unless an alternative safe detail can be found, HWI works shall not progress in the area causing the unsafe operation;</li> </ul> |

Table B.7 – (continued)

- compromises the functionality of existing ventilation ducts/systems; unless an alternative safe detail can be found, HWI works shall not progress in the area causing the unsafe operation;
  - compromises the functionality and/or safety of existing services (gas, electric, water, telephone, etc.); unless an alternative safe detail can be found, HWI works shall not progress in the area causing the unsafe operation; and
  - results in the proposed installation being non-compliant with any requirements of the retrofit design.
- 3) The Retrofit Installer shall include confirmation that the condition of the substrate is suitable for the works to commence and where all or any of the substrate does not fulfil the requirements for installation, preparation of proposals for adaptations to be made or additional preparation undertaken that will be necessary in order that works can commence.
- 4) All instances of potential non-compliance identified in the pre-installation building inspection shall be documented and referred to the Retrofit Coordinator for resolution. Any design adjustments, special adaptations and/or additional preparation requirements shall be confirmed as acceptable in writing, by the system supplier and/or Retrofit Coordinator.
- 5) The retrofit design documentation shall be amended to include any specified changes to the installation, the installation method statement modified accordingly and the pre-installation building inspection records updated to provide documentary evidence that the intended modified installation will address all the issues identified in the pre-installation building inspection and meets the requirements of all parties.
- 6) The Retrofit Installer shall:
- verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see **B7-I3**) prior to commencement of installation;
  - a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;
    - the person undertaking the independent checks and inspection shall:
      - be independent of the inspector or the Retrofit Installer of the hybrid wall insulation; and
      - not be paid by results nor remunerated only where an assessment is found to be valid;
- OR
- verify that a recognised pre-notification process has been undertaken under an industry quality assurance scheme for hybrid wall insulation, that has the features listed in **B.1** of PAS 2035:2023.
- 7) The Retrofit Installer shall confirm that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.

Table B.7 – (continued)

| Installation role  | Vocational competence required   |
|--|--|
| <b>B7-13</b><br>Building Inspector   | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B7-14</b><br>Operative (threshold)  | Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
| <b>B7-15</b><br>Operative (specialist)   | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B7-15</b><br>Competence currency  | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| <b>B7-16</b><br>Competence ratio   | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised;</li> </ul> <p>but shall not be less than one carded operative per team of 4 (1 to 3), at the specified installation location at any time.</p> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B7-17</b><br>Measure-specific information to be handed over to the client in addition to 6.9. | <ul style="list-style-type: none"> <li>• The user manual shall include details on fixing to the system, drilling or cutting the system, repairs to damaged areas, avoiding damage (e.g. ladders), the importance of weather seals, how to hang items on IWV including restrictions on weights, breaking the vapour control layer and sealing, advice on fixing radiators, changes of electrical sockets, name/contact details of both the Retrofit Installer and system certificate holder, materials specification and guidance on living in a highly insulated property, including the need for appropriate ventilation. The contents of the manual shall be explained to the client (not just left with them);</li> <li>• Where end-user maintenance is possible, details of how to undertake the maintenance including frequency and any product or tools that shall be used and where to obtain the required products and tools;</li> <li>• Any relevant product warranty information and guarantees;</li> <li>• The Retrofit Installer shall handover to the client:</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days); and</li> <li>• It should be explained to the client that repairs should be carried out by a competent person, but that maintenance is their responsibility.</li> </ul>               |

## B.8 Measure BFM.8 – Internal wall insulation

### B.8.1 Additional installation requirements

When installing internal wall insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B8-11 of Table B.8.

### B.8.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the internal wall insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B8-12 of Table B.8.

### B.8.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of internal wall insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B8-13 of Table B.8.

### B.8.4 Operative competence

When installing internal wall insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B8-14 of Table B.8) with the competence currency specified in B8-15 of Table B.8, at the competency ratio specified in B8-16 of Table B.8.

### B.8.5 Provision of information in respect of internal wall insulation

The Retrofit Installer shall provide information identified at B8-17 of Table B.8 to the client as part of the handover process required in 6.9.

**Table B.8 – Measure-specific requirements for internal wall insulation (BFM.8)**

| Measure description  | Internal wall insulation   |
|--|--|
| <b>Measure type</b>  | As measure description (no sub-division)   |
| <b>B8-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement. In undertaking the installation, the Installers responsibilities shall include:</p> <ul style="list-style-type: none"> <li>a) before installation starts, confirming that the retrofit design has made provision for verifying that:                             <ul style="list-style-type: none"> <li>• the IWI system provided for installation is that recommended in the pre-design building assessment and specified in the retrofit design;</li> <li>• all essential ventilation openings that require sleeving or safeguarding before installation are located and identified;</li> <li>• the position of all flues whether or not they are in service is determined and the measures that shall be taken to safeguard their proper functioning is determined;</li> <li>• any existing cables, pipework, ducting etc. that require it are removed or repositioned as/where necessary to accommodate the planned IWI system, with authorization from the relevant responsible body (where required) and undertaken by a person competent to undertake such work;</li> <li>• other areas of the dwelling and surrounding area that could be at risk during installation are adequately protected to confirm they are not damaged;</li> <li>• in solid wall structures made of porous materials, moisture movement, necessary for the managing of internal and/or external moisture loads, will not be impeded or altered to such an extent that moisture may begin to accumulate within fabric; and</li> <li>• in the event that any of these aspects is not adequately covered, liaising with the Retrofit Coordinator to provide for their undertaking.</li> </ul> </li> </ul> |

Table B.8 – (continued)

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|--|
| <p>b) during installation, verifying that:</p> <ul style="list-style-type: none"> <li>• all work is carried out in accordance with the site specific retrofit design, drawings and method statement and that work is not permitted to progress unless copies of the site-specific specification documentation are accessible at location and all operatives are aware of the content and requirements relevant to their designated activities;</li> <li>• the system and all detailed interfaces with other parts of the dwelling or other planned EEMs to be undertaken in a manner and sequenced such, that all measures are fully effective, with optimized performance and junctions that are safe and durable for all expected conditions. Particular attention shall be given to the management of moisture and prevent the risk of moisture accumulation;</li> <li>• whether or not specifically required by the retrofit design, the items listed in i to viii below are given particular attention with regard to the efficacy and durability of the detail especially concerning the management and/or exclusion of moisture and/or the risk of fabric moisture accumulation, surface/interstitial condensation, rising damp or otherwise;</li> <li>• system floor and ceiling details;</li> <li>• window/door reveals/heads;</li> <li>• junctions of internal solid wall insulation with intermediate floors and suspended ground floors;</li> <li>• locations where the thickness of internal wall insulation is reduced;</li> <li>• system/cill interfaces;</li> <li>• surface fixtures (structurally sound);</li> <li>• penetrations through the system;</li> <li>• detailing and sealing around vents/flues, meters and other heating related structures/pipework;</li> <li>• all details are installed to minimize the risks of cold bridging, removing/relocating/extending to allow continuity of insulation in all cases where feasible e.g. pipework, flues, ducts, switches, sockets, radiators etc.;</li> <li>• photographic evidence of key stages of the installation is prepared and retained, including close up photographs of representative examples of all moisture and thermally sensitive details;</li> <li>• all installations are in accordance with industry best practice. Where conflict with the requirements of this PAS exists, this PAS takes precedence;</li> <li>• ventilation of the dwelling is no worse following the installation of the measure than prior to the installation of the measure (this may require additional ventilation see also A.5); and</li> <li>• upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings and flues.</li> </ul> <p><b>NOTE 1</b> Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier may be necessary before an application for assessment/certification is made to a certification body.</p> <p><b>NOTE 2</b> Attention is drawn to the need, where relevant, for all internal wall insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> |
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Table B.8 – (continued)

|   |   |
|---|---|
| <p><b>B8-I2</b> Measure-specific pre-installation building inspection requirements supplementary to Clause 7.2.</p> | <p>1) In meeting the requirements specified in Clause 7.2, the designated competent person shall confirm that:</p> <ol style="list-style-type: none"> <li>a) a full and detailed pre-design building assessment had been undertaken by a competent person (see B8-13 of this Table), prior to the retrofit design being undertaken; and</li> <li>b) the retrofit design relevant to the installation under inspection has been produced in accordance with Clause 4 of this PAS taking full account of the findings and recommendations of the pre-design building assessment, including:             <ul style="list-style-type: none"> <li>• thermal performance calculations,</li> <li>• moisture risk analysis;</li> <li>• ventilation requirements and standard/bespoke drawing details;</li> <li>• the main components of the system including the fixing type/method, the insulation type and thickness, the breather membrane, vapour control layer (if required), board type and jointing, and the finish;</li> <li>• the proposed details for the main interfaces; (thermal bridging, meter boxes, reveals, roofline joists, party walls, base detail with particular reference to below dpc, base/floor details, seals at windows/doors, seals to penetrations, light fittings, sockets, fixing and sealing of surface mounted structures, interfaces with ceilings, interfaces with roof, junctions between the system and other finishes and/or other EEM) clearly demonstrate how the installation will avoid moisture risk particularly at moisture sensitive locations such as embedded timbers (e.g. timber joist ends); and</li> <li>• the installation to the retrofit design is practical and achievable given the particular IWI system chosen for the project and the specific dwelling construction, site conditions and other EEMs planned for the property. (See also Measures Interaction Matrix Figure A.1).</li> </ul> </li> </ol> <p>2) The Retrofit Installer shall investigate and assess if the IWI installation work:</p> <ul style="list-style-type: none"> <li>• results in non-compliance with the Building Regulations, e.g. in relation to workmanship, materials, structural stability, fire safety; manages moisture. Where possible, any areas of non-compliance shall be rectified by selection of another solution/ detail, which shall be documented in the pre-installation building inspection and all contract documentation amended accordingly i.e. specification, drawings, method statement;</li> <li>• results in avoidable thermal bridging; where thermal bridging is avoidable by adaptation of the detail, such measures shall be taken and the contract documents amended to suit. Design details shall be such they incorporate additional capacity, that for example, will provide water management within the system should surface or interstitial condensation occur;</li> <li>• results in unsafe operation of combustion appliances; unless an alternative safe detail can be found, IWI works shall not progress in the area causing the unsafe operation;</li> <li>• compromises the functionality of existing ventilation ducts/systems; unless an alternative safe detail can be found, IWI works shall not progress in the area causing the unsafe operation;</li> <li>• compromises the functionality and/or safety of existing services (gas, electric, water, telephone, etc.); unless an alternative safe detail can be found, IWI works shall not progress in the area causing the unsafe operation; and</li> <li>• results in the proposed installation being non-compliant with any requirements of the EEM supplier or of the retrofit design.</li> </ul> <p>3) The Retrofit Installer shall include confirmation that the condition of the substrate is suitable for the works to commence and where all or any of the substrate does not fulfil the requirements for installation, preparation of proposals for adaptations to be made or additional preparation undertaken that will be necessary in order that works can commence.</p> |
|---|---|

Table B.8 – (continued)

|                                    |   |
|------------------------------------|---|
|                                    | <p>4) All instances of potential non-compliance identified in the pre-installation building inspection shall be documented and referred to the Retrofit Coordinator for resolution. Any design adjustments, special adaptations and/or additional preparation requirements shall be confirmed as acceptable in writing, by the system supplier and/or the Retrofit Coordinator.</p> <p>5) The retrofit design documentation shall be amended to include any specified changes to the installation, the installation method statement modified accordingly and the pre-installation building inspection records updated to provide documentary evidence that the intended modified installation will address all the issues identified in the pre-installation building inspection and meets the requirements of all parties.</p> <p>6) The Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B8-13) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall: <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the internal wall insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>• verify that a recognised pre-notification process has been undertaken under an industry quality assurance scheme for internal wall insulation, that has the features listed in B.1 of PAS 2035:2023.</li> </ul> <p>7) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p> |
| <b>Installation role</b>           | <b>Vocational competence required</b>   |
| <b>B8-13 Building Inspector</b>    | Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B8-14 Operative (threshold)</b> | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| <b>Operative (specialist)</b>      | Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B8-15 Competence currency</b>   | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.  |

Table B.8 – (continued)

|  |  |
|--|--|
| <p><b>B8-16</b>      <b>Competence ratio</b></p>   | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale geographical spread and complexity of the work being undertaken;</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p>but shall not be less than one carded operative per team of 4 (1 to 3), at the specified installation location at any time.</p> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p> |
| <p><b>B8-17</b>      <b>Measure-specific information to be handed over to the client in addition to 6.9.</b></p> | <ul style="list-style-type: none"> <li>• The user manual shall include details on fixing to the system, drilling or cutting the system, repairs to damaged areas, avoiding damage (e.g. ladders), the importance of weather seals, how to hang items on IWI including restrictions on weights, breaking the vapour control layer and sealing, advice on fixing radiators, changes of electrical sockets, name/contact details of both the Retrofit Installer and system certificate holder, materials specification and guidance on living in a highly insulated property, including the need for appropriate ventilation. The contents of the manual should be explained to the client (not just left with them).</li> <li>• Where end-user maintenance is possible, details of how to undertake the maintenance including frequency and any product or tools that shall be used and where to obtain the required products and tools.</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).</li> <li>• It shall be explained to the client that repairs should be carried out by a competent person, but that maintenance is their responsibility.</li> </ul> <p>Any relevant product warranty information and guarantees.</p>   |



## B.9 Measure BFM.9 – Loft insulation

### B.9.1 Additional installation requirements

When installing loft insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Installer shall also comply with any standards, specifications, instructions or guidance identified in B9-I1 of Table B.9.

### B.9.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the loft insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B9-I2 of Table B.9.

### B.9.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of loft insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements specified in B9-I3 of Table B.9.

### B.9.4 Operative competence

When installing loft insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B9-I4 of Table B.9), with competence currency specified in B9-I5 of Table B.9 at the competency ratio specified in B9-I6 of Table B.9.

### B.9.5 Provision of information in respect of loft insulation

The Retrofit Installer shall provide information identified in B9-I7 of Table B.9 to the client as part of the handover process required in 6.9.

**Table B.9 – Measure-specific requirements for loft insulation (BFM.9)**

| Measure description   | Loft insulation   |                  |
|---|---|------------------|
|   | BFM.9.1   | Roll insulation  |
| Measure type  | BFM.9.1   | Roll insulation  |
|   | BFM.9.2   | Blown insulation |
| <b>B9-I1 Additional installation requirements to those in Clause 4 to Clause 10</b> | <p><b>NOTE 1</b> The Retrofit Installer should verify that the methods used for the installation of loft insulation products or systems are as specified by the system supplier (where provided) and in accordance with the relevant retrofit design and incorporated in the installation method statement (5.1).</p> <p>Where relevant to the type of installation being undertaken, the requirements and guidance given in General requirements and guidance for the installation of cold roof loft insulation [N6] shall also apply.</p> <p>The Retrofit Installer responsibilities shall include preparation of the site and finishing work, incorporating:</p> <ul style="list-style-type: none"> <li>• identification of essential ventilation openings;</li> <li>• checking that upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings;</li> <li>• identification of any electrical wiring that shall not be covered by insulation (because of the risk of overheating) and shall therefore be relocated above the insulation; and</li> <li>• identification of any downlights recessed into the ceiling that shall not be covered by insulation (because of the risk of overheating) and shall therefore be boxed to permit adequate surrounding ventilation.</li> </ul> <p><b>NOTE 2</b> Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier might be necessary before an application for assessment/certification is made to a certification body.</p> |                  |

Table B.9 – (continued)

|   |  |
|---|--|
|   | <p><b>NOTE 3</b> Attention is drawn to the need, where relevant, for all loft insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p>  |
| <p><b>B9-12</b> Pre-installation building inspection requirements</p> | <p>1) The Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• pre-existing damage to the areas that are accessed by the installation operatives;</li> <li>• the extent of the area and elements to be insulated;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the condition of the roof space is suitable for the works to commence in relation to:             <ul style="list-style-type: none"> <li>• existence of appropriate roof space ventilation arrangements;</li> <li>• the roof space being free from rodents/pests and protected species, e.g. bats;</li> <li>• timbers free from rot and/or infestation;</li> <li>• the condition of the ceiling;</li> <li>• metal structural roof members being free from visible signs of corrosion;</li> <li>• electrical wiring is free from visible defects, e.g. damaged cables, trailing cables, exposed conductors;</li> <li>• no visible signs of water penetration; and</li> <li>• no visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.;</li> </ul> </li> <li>• if the proposed installation would:             <ul style="list-style-type: none"> <li>• be non-compliant with any requirements stated by the designer/specifier;</li> <li>• compromise the functionality of existing air supply/extract ventilation ducts/systems; and</li> <li>• result in unsafe operation of a combustion appliances;</li> </ul> </li> <li>• if the site layout or conditions would impair the execution of the works in relation to:             <ul style="list-style-type: none"> <li>• appropriate access to the property and to the roof space; and</li> <li>• the roof space being free from stored items, boarding etc.;</li> <li>• if the installation to be undertaken would result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture.</li> </ul> </li> </ul> <p>2) The Retrofit Installer shall verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B9-13) prior to commencement of installation;</p> <ul style="list-style-type: none"> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall:             <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the loft insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> |

Table B.9 – (continued)

|  |  |
|--|--|
|  | <p>OR</p> <ul style="list-style-type: none"> <li>verify that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for loft insulation, that has the features listed in PAS 2035:2023, B.1.</li> </ul> <p>3) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p>   |
| <b>Installation role</b>   | <b>Vocational competence required</b>  |
| <b>B9-13 Building Inspector</b>  | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B9-14 Operative (threshold)</b>   | Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
| <b>Operative (specialist)</b>  | Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B9-15 Competence currency</b>   | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| <b>B9-16 Competence ratio</b>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B9-17 Measure-specific information to be handed over to the client in addition to 6.9</b> | <p>The Retrofit Installer shall handover to the client:</p> <ul style="list-style-type: none"> <li>a Building Regulations compliance certificate where appropriate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days); and</li> <li>any relevant product warranty information and guarantees.</li> </ul>   |

## B.10 Measure BFM.10 – Pitched roof insulation

### B.10.1 Additional installation requirements

When installing pitched roof insulation, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B10-11 of Table B.10.

### B.10.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the pitched roof insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B10-12 of Table B.10.

### B.10.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of pitched roof insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B10-13 of Table B.10.

### B.10.4 Operative competence

When installing pitched roof insulation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B10I-4 of Table B.10), with competence currency specified in B10-15 of Table B.10 at the competency ratio specified in B10-16 of Table B.10.

### B.10.5 Provision of information in respect of pitched roof insulation

The Retrofit Installer shall provide information identified at B10-17 of Table B.10 to the client as part of the handover process required in 6.9.

**Table B.10 – Measure-specific requirements for pitched roof insulation (BFM.10)**

| Measure description  | Pitched roof insulation  |
|--|--|
| <b>Measure type</b>  | As measure description (no sub-division)   |
| <b>B10-11 Additional installation requirements to those in Clause 4 to Clause 10</b> | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement.</p> <p>The Retrofit Installer shall prepare the site and finish work, including:</p> <ul style="list-style-type: none"> <li>• identification of essential ventilation openings; and</li> <li>• verifying that upon completion of the installation or at the end of each working day, if the installation takes longer than one day, the operatives investigate and confirm the proper functioning of all ventilation openings.</li> </ul> <p><i>NOTE 1 Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the products/system to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier may be necessary before an application for assessment/certification is made to a certification body.</i></p> <p><i>NOTE 2 Attention is drawn to the need, where relevant, for all pitched roof insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-5 [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</i></p> <p><i>NOTE 3 Where third-party accreditation exists to support it, non-vented roofs might be acceptable when using certain air and/or vapour permeable underlays.</i></p> |

Table B.10 – (continued)

|  |  |
|--|--|
| <p><b>B10-I2</b> Pre-installation building inspection requirements</p> | <p>1) The Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• pre-existing damage to the areas that are to be accessed by the installation operatives;</li> <li>• the extent of the area and elements to be insulated;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the condition of the roof space is suitable for the works to commence in relation to:             <ul style="list-style-type: none"> <li>• existence of appropriate roof space ventilation arrangements where required [B10-I12, 3)];</li> <li>• the roof space being free from rodents/pests and protected species, e.g. bats;</li> <li>• timbers being free from rot and/or infestation;</li> <li>• metal structural roof members being free from visible signs of corrosion;</li> <li>• electrical wiring is free from visible defects, e.g. damaged cables, trailing cables, exposed conductors;</li> <li>• no visible signs of water penetration; and</li> <li>• no visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.</li> </ul> </li> <li>• if the proposed installation would:             <ul style="list-style-type: none"> <li>• be non-compliant with any requirements stated by the designer/specifier;</li> <li>• compromise the functionality of existing air supply/extract ventilation ducts/systems; and</li> <li>• result in unsafe operation of a combustion appliances.</li> </ul> </li> <li>• if the site layout or conditions would impair the execution of the works in relation to:             <ul style="list-style-type: none"> <li>• appropriate access to the property and to the roof space; and</li> <li>• the roof space being free from stored items, boarding, etc;</li> </ul> </li> <li>• if the installation to be undertaken would result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture.</li> </ul> <p>2) The Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B10-I3) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall:             <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the pitched roof insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• verify that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for pitched roof insulation, that has the features listed in PAS 2035:2023, B.1</li> </ul> <p>3) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p> |
|--|--|

Table B.10 – (continued)

| Installation role  | Vocational competence required  |
|--|---|
| <b>B10-13</b><br>Building Inspector  | Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B10-14</b><br>Operative (threshold)<br>Operative (specialist)                                 | Shall demonstrate that vocational competence is being acquired as defined in 3.28.<br>Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).   |
| <b>B10-15</b><br>Competence currency   | Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.  |
| <b>B10-16</b><br>Competence ratio  | For each installation task to be undertaken, the Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the: <ul style="list-style-type: none"> <li>• range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>• supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competence ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should, carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B10-17</b><br>Measure-specific information to be handed over to the client in addition to 6.9 | The Retrofit Installer shall handover to the client: <ul style="list-style-type: none"> <li>• a Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).</li> <li>• any relevant product warranty information and guarantees.</li> </ul>   |

## B.11 BFM.11 – Solar blinds, shutters and shading devices (internal and external)

### B.11.1 Additional installation requirements

When installing solar blinds, shutters or shading devices, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also work to any standards, specifications, instructions or guidance identified in B11-11 of Table B.11.

### B.11.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the solar blinds, shutters or shading devices at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B11-12 of Table B.11.

### B.11.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of solar blinds, shutters or shading devices, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B11-13 of Table B.11.

### B.11.4 Operative competence

When installing solar blinds, shutters or shading devices, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B11-1.4 of Table B.11), with competence currency specified in B11-15 of Table B.11 at the competency ratio specified in B11-16 of Table B.11.

### B.11.5 Provision of information in respect of solar blinds, shutters and shading devices

The Retrofit Installer shall provide information identified at B11-17 of Table B.11 to the client as part of the handover process required in 6.9.

**Table B.11 – Solar blinds, shutters and shading devices (BFM.11)**

| Measure description   | Solar blinds, shutters and shading devices (internal and external)  |
|---|---|
| Measure type  | BFM11.1 Solar blinds, shutters and shading devices for internal or external use, mechanical or manually operated<br>BFM11.2 Solar blinds, shutters and shading devices for internal or external use, electrically operated  |
| B11-11 Additional installation requirements to those in Clause 4 to Clause 10 | <p>The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement.</p> <p><b>NOTE 1</b> Attention is drawn to the need, where relevant, for all electrically operated solar blind, shutter and shading devices installation work to comply with the current edition of BS 7671.</p> <p><b>NOTE 2</b> Attention is drawn to the need, where relevant, for all solar blind, shutter and shading devices installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; and conservation of fuel and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-5 [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [9]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> <p><b>NOTE 3</b> Guidance on overheating mitigation is given in The Building Regulations Approved Document O, "Overheating" which includes limits on TM 59 modelling [12].</p> |

Table B.11 – (continued)

|                                 |   |
|---------------------------------|---|
| <p><b>B11-I2</b></p>            | <p><b>Pre-installation building inspection requirements</b></p> <p>The Retrofit Installer shall investigate and determine if:</p> <ul style="list-style-type: none"> <li>• the condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• the client has been provided with the guidance to low energy shading;</li> <li>• the energy saving calculations of the installation are conducted in accordance with EN shading performance standards and are correct for the site dimensions and the glazing installed;</li> <li>• any required planning or listed building related consents have been obtained;</li> <li>• the installation work would result in non-compliance with the building regulations in relation to workmanship; materials; structural stability and fire safety;</li> <li>• the proposed installation would be compliant with any requirements stated by the manufacturer;</li> <li>• the site layout or conditions would impair the execution of the works;</li> <li>• the proposed installation would not compromise or impede the operation of the fenestration;</li> <li>• specialist access equipment is required;</li> <li>• child safety measures are required for internal window coverings;</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present; and</li> <li>• the installation to be undertaken would result in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture.</li> </ul> |
| <p><b>Installation role</b></p> | <p><b>Vocational competence required</b></p>  |
| <p><b>B11-I3</b></p>            | <p><b>Building Inspector</b></p> <p>Able to demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>B11-I4</b></p>            | <p><b>Operative (threshold)</b></p> <p>Able to demonstrate that vocational competence is being acquired as defined in 3.28.</p>   |
| <p><b>B11-I5</b></p>            | <p><b>Operative (specialist)</b></p> <p>Able to demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>B11-I6</b></p>            | <p><b>Competence currency</b></p> <p>To be verified by the Installer at no greater than 12 monthly intervals, as defined in 3.31.</p> <p><b>Competence ratio</b></p> <p>For each installation task to be undertaken, the Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p>   |



Table B.11 – (continued)

|   |   |
|---|---|
| <p><b>B111-17</b> Measure-specific information to be handed over to the Client in addition to 6.9</p> | <p>The Retrofit Installer shall provide:</p> <ul style="list-style-type: none"> <li>• relevant operating, maintenance, safety and security documentation relevant to the installation;</li> <li>• product warranty information and guarantees;</li> <li>• product manufacturer installation and servicing instructions;</li> <li>• electrical certification, if relevant;</li> <li>• child safety information, if relevant;</li> <li>• maintenance and cleaning recommendations (if any); and</li> <li>• guidance to low energy shading.</li> </ul> <p>The Retrofit Installer shall provide the following information to the Client:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user; and</li> <li>• a demonstration of: <ul style="list-style-type: none"> <li>• product operation especially with relevance to best practice for energy saving;</li> <li>• child safety components, if relevant; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |
|---|---|

## B.12 BFM.12 – Room-in-roof insulation

### B.12.1 Additional installation requirements

When installing insulation to a room constructed in the roof space of an existing dwelling, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also work to any standards, specifications, instructions or guidance identified in B12-11 of Table B.12.

**NOTE** This measure includes insulating all of the relevant heat-loss elements of a RIR (flat ceiling, sloping roofs, dwarf walls and gable ends). Partial insulation of a room-in-roof omitting elements and thereby leaving the dwelling prone to heat loss and at risk of condensation and other related issues is not compliant with this PAS. The only exception to this, in line with Building Regulations, is where health and safety is compromised (i.e. width of stairwells, ceiling height etc) or more than 5% of the room floorspace would be lost.

### B.12.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of room-in-roof insulation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in B12-12 of Table B.12.

### B.12.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of room-in-roof insulation the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B12-13 of Table B.12.

### B.12.4 Operative competence

When installing room-in-roof insulation the Installer shall employ or contract only operatives with the required level of competence attained through one of the permitted routes (B12-14 of Table B.12), with competence currency specified in B12-15 of Table B.12 at the competency ratio specified in B12-16 of Table B.12.

### B.12.5 Provision of information in respect of room-in-roof insulation

At the time of handover of installed room-in-roof insulation to the Client, the Retrofit Installer shall ensure that the information identified at B12-17 of Table B.12 is provided to the Client as part of the handover process required in 6.9.

**Table B.12 – Room-in-roof insulation (BFM.12)**

| Measure description   | Room in roof insulation (RIR) including all heat-loss elements of the room in the roof  |
|---|---|
| Measure type  | As measure description (no sub-division)  |
| B12-11<br>Additional installation requirements to those in Clause 4 to Clause 10  | The Retrofit Installer shall verify that the methods used for the installation of insulation products or systems in a room in roof, are as specified by the system supplier (where provided) and in accordance with the relevant retrofit design, as incorporated in the installation method statement (5.1).<br>In undertaking the installation, Retrofit Installers shall comply with the guidance provided in <i>Retrofit Room in Roof Insulation Guide to Best Practice</i> [N5] (see 10.7.2).  |
| B12-12<br>Measure-specific pre-installation building inspection requirements supplementary to those in the core of this PAS (7.2) | <p>1) The Retrofit Installer shall carry out a pre-installation building inspection in accordance with all requirements set out in the measure-specific annexes that are relevant to the insulation types to be installed. The Retrofit Installer shall check:</p> <ul style="list-style-type: none"> <li>a) the ventilation to spaces within the roof void and not included in the Room-in-Roof space, are checked and assessed to ensure that adequate ventilation is provided and maintained (see A.5); and</li> <li>b) there is no requirement for thermal bridging to be addressed at the ridge or other connections with the main structure (see A.5).</li> </ul> <p><b>NOTE 1</b> In undertaking pre-installation building inspections, the Retrofit Installer should use an industry recommended checklist e.g. the Room-in-Roof insulation pre-installation building inspection checklist (see 10.7.2).</p> <p><b>NOTE 2</b> The retrofit design should provide detailed instruction for addressing both a) and b). Where the pre-installation building inspection identifies ventilation or thermal bridging issues that are perceived not to have been adequately provided for, the Retrofit Installer should refer these to the Retrofit Coordinator.</p> |

Table B.12 – (continued)

|               |   |
|---------------|---|
|               | <p>2) The Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B12-I3) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall: <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the room-in-roof insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• verify that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for room-in-roof insulation, that has the features listed in PAS 2035:2023, B.1.</li> </ul> <p>3) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p>   |
|               | <b>Vocational competence required</b>   |
| <b>B12-I3</b> | <b>Building Inspector</b><br>Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B12-I4</b> | <b>Operative (threshold)</b><br>Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
|               | <b>Operative (specialist)</b><br>Shall demonstrate vocational competence as defined in 3.27.  |
| <b>B12-I5</b> | <b>Competence currency</b><br>Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.  |
| <b>B12-I6</b> | <b>Competence ratio</b><br>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the: <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken;</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised,</li> </ul> but shall be not less than one specialist operative (carded) operative per team of 4 (1 to 3), at the specified installation location at any time. <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competence ratio to be applied. For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B12-I7</b> | <b>Measure-specific information to be handed over to the client in addition to 6.9</b><br>The Retrofit Installer shall provide the client with the information which is in accordance with all requirements set out in I7 of the measure-specific annexes that are relevant to the EEM installation types that have been installed including that related to any relevant product warranty information and guarantees.  |

## B.13 BFM.13: Insulation of existing park homes

### B.13.1 Additional installation requirements

When installing insulation to an existing park home, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in B13-11 of Table B.13.

### B.13.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of insulation at an existing park home, the Retrofit Installer shall undertake a pre-installation inspection of that particular park home in accordance with the requirements set out in B13-12 of Table B.13.

### B.13.3 Inspector competence

When undertaking a pre-installation inspection of a park home in respect of the installation of insulation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of B13-13 of Table B.13.

### B.13.4 Operative competence

When installing park home insulation the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (B13-14 of Table B.13), with competence currency specified in B13-15 of Table B.13 at the competency ratio specified in B13-16 of Table B.13.

### B.13.5 Provision of information in respect of insulation of existing park homes

The Retrofit Installer shall provide information identified at B13-17 of Table B.13 to the client as part of the handover process required in 6.9.

**Table B.13 – Insulation of existing park homes (BFM.13)**

| Measure description   | Insulation of existing park homes   |
|---|---|
| <b>Measure type</b>   | As measure description (no sub-division)  |
| <b>B13-11 Additional installation requirements to those in Clause 4 to Clause 9</b>                             | The Retrofit Installer shall use methods of installation specified by the system supplier (where provided) and in accordance with the relevant retrofit design. This information shall be included in the installation method statement. In undertaking the installation of insulation in residential park homes, Retrofit Installers shall comply with all requirements set out in I1 of the measure-specific annexes of this PAS that are relevant to the insulation types to be installed and in addition, comply with BS 3632:2015.   |
| <b>B13-12 Measure-specific pre-installation park home inspection requirements supplementary to those in 7.2</b> | <p>1) Retrofit Installers shall carry out pre installation inspection in accordance with all requirements set out in I2 of the measure-specific annexes of this PAS that are relevant to the insulation types to be installed, including B.2, B.3, B.4, B.5, B.6, B.9, B.10. In addition, the Retrofit Installer shall check and assess that:</p> <ul style="list-style-type: none"> <li>a) the ventilation to any spaces within the park home are not included in the insulation retrofit project, so that ventilation is provided and maintained in accordance with BS 3632:2015, 4.10; and</li> <li>b) there is no requirement for thermal bridging to be addressed, in addition to that included in the retrofit design provided, either in areas covered by the project or other connected spaces within the residential park home (see A.5).</li> </ul> <p><b>NOTE 1</b> In undertaking pre-installation inspections of residential park homes, Retrofit Installers should use an industry recommended checklist.</p> <p><b>NOTE 2</b> The retrofit design should provide detailed instruction for addressing both a) and b). Where the pre-installation inspection of a residential park home identifies ventilation or thermal bridging issues that are perceived not to have been adequately provided for, the Installer should refer these to the client (see 7.2.4 and 7.2.5).</p> |

Table B.13 – (continued)

|               |  |
|---------------|--|
|               | <p>2) The Retrofit Installer shall:</p> <ul style="list-style-type: none"> <li>• verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B13-B) prior to commencement of installation;</li> <li>• a randomly selected 1 in 10 of those checks (minimum of 1) shall include physical inspection of the dwelling by a qualified person;</li> <li>• the person undertaking the independent checks and inspection shall: <ul style="list-style-type: none"> <li>• be independent of the inspector or the Retrofit Installer of the park home insulation; and</li> <li>• not be paid by results nor remunerated only where an assessment is found to be valid;</li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• verify that a recognized pre-notification process has been undertaken under an industry quality assurance scheme for park home insulation, that has the features listed in PAS 2035:2023, B.6.</li> </ul> <p>3) The Retrofit Installer shall verify that each inspection checked includes a unique identifier and the names of the persons who completed the inspection and the check.</p>   |
|               | <b>Vocational competence required</b>  |
| <b>B13-I3</b> | <b>Park Homes Inspector</b><br>Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B13-I4</b> | <b>Operative (threshold)</b><br>Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
| <b>B13-I5</b> | <b>Operative (specialist)</b><br>Shall demonstrate vocational competence as defined in 3.27.   |
| <b>B13-I6</b> | <b>Competence Currency</b><br>Shall be verified by the Retrofit Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| <b>B13-I6</b> | <b>Competence ratio</b><br>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the: <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| <b>B13-I7</b> | <b>Measure-specific information to be handed over to the client in addition to 6.9</b><br>The Retrofit Installer shall handover information to the client in accordance with I7 in Annexes A to D that are relevant to the EEM installation types that have been installed, including that related to any relevant product warranty information and guarantees.  |

# Annex C (normative) BSM energy efficiency measures

## C.1 Measure BSM.1 – Condensing boilers, natural gas-fired and liquefied petroleum gas-fired

### C.1.1 Additional installation requirements

When installing a gas-fired condensing boiler, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also work to any standards, specifications, instructions or guidance identified in C1-11 of Table C.1.

### C.1.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the gas-fired condensing boiler at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C1-12 of Table C.1.

### C.1.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of a gas-fired condensing boiler, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C1-13 of Table C.1.

### C.1.4 Operative competence

When installing a gas-fired condensing boiler, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C1-14 of Table C.1), at the competency ratio specified in C1-16 of Table C.1.

**NOTE** Attention is drawn to the requirement for Gas Safe registration for anyone carrying out gas work in the United Kingdom, Isle of Man and Guernsey under the Gas Safety (Installation and Use) Regulations 1998 [13].

### C.1.5 Provision of information in respect of gas-fired condensing boilers

The Retrofit Installer shall provide information identified at C1-17 of Table C.1 to the client as part of the handover process required in 6.9.

**Table C.1 – Measure-specific requirements for gas-fired condensing boilers (BSM.1)**

| Measure description   | Measure type  |
|---|---|
| Condensing boilers, natural gas-fired and liquefied petroleum gas-fired         | As measure description (no sub-division)  |
| C1-11<br>Additional installation requirements to those in Clause 4 to Clause 10 | The requirements or guidance given in product manufacturer's instructions shall be carried out in accordance with the following standards:<br>a) BS 6798;<br>b) BS 6644;<br>c) BS 6891;<br>d) BS 5440-1;<br>e) BS 5440-2;<br>f) BS 7593;<br>g) UKLPG, Code of practice 22, Design, installation and testing of LPG piping systems;<br>h) BS 5482-1;<br>i) IGEM UP/1, 1A & 1B; and |

Table C.1 – (continued)

|              |   |
|--------------|---|
|              | <p>j) <i>The Domestic Building Services Compliance Guide (published by MHCLG) [N1].</i></p> <p><b>NOTE</b> <i>Attention is drawn to the need, where relevant, for all gas-fired condensing boiler installation work to comply with:</i></p> <p>a) <i>the current Gas Safety (Installation and Use) Regulations [13] that apply in the UK country or locality in which the installation is being carried out. The Gas Safety (Installation and Use) Regulations [13] have requirements relating to both technical gas safety standards and qualification and supervision of persons carrying out gas work;</i></p> <p>b) <i>the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation, hot water safety, combustion appliances, conservation of fuel and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</i></p> <p>c) <i>the current Water Supply (Water Fittings) Regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out; and</i></p> <p>d) <i>the current edition of BS 7671.</i></p> |
| <b>C1-12</b> | <p><b>Pre-installation building inspection requirements</b></p> <p>The Retrofit Installer shall investigate and determine if:</p> <ul style="list-style-type: none"> <li>• the condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• the condition of the existing electrical installation is satisfactory in relation to the proposed work;</li> <li>• the installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; heat-producing appliances; conservation of fuel and power;</li> <li>• the installation work would result in non-compliance with relevant gas safety regulations;</li> <li>• the proposed installation would be compliant with any requirements stated by the boiler manufacturer;</li> <li>• the proposed installation might result in a plume nuisance situation;</li> <li>• any special condensate disposal arrangements are required;</li> <li>• the dwelling is located in a hard water area (above 200 ppm);</li> <li>• water conditioning arrangements are required in relation to the water hardness; and</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>   |
|              | <b>Vocational competence required</b>   |
| <b>C1-13</b> | <b>Building Inspector</b><br>Shall demonstrate vocational competence as defined in 3.27.  |
| <b>C1-14</b> | <b>Operative, (threshold)</b><br><b>Operative, (specialist)</b><br>Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).  |
| <b>C1-15</b> | <b>Competence currency</b><br>Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.  |

Table C.1 – (continued)

|   |  |
|---|--|
| <p><b>C1-16</b>      <b>Competence ratio</b></p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p>   |
| <p><b>C1-17</b>      <b>Measure-specific information to be handed over to the client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer installation and servicing instructions;</li> <li>• product manufacturer user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• benchmark commissioning certificate or other commissioning certificate that meets the requirements of the Building Regulations;</li> <li>• system cleaning and water treatment record (if not included in the commissioning certificate);</li> <li>• Retrofit Installer details (if not included in the commissioning certificate), e.g. mechanical, electrical;</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days); and</li> <li>• a copy of any electrical inspection and testing certificates that have completed to meet the requirements of Building Regulations and/or the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and demonstrate:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user; and</li> <li>• a demonstration of:             <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency;</li> <li>• any safety checks that the system user should undertake; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |



## C.2 Measure BSM.2.2 – Oil-fired condensing boilers

### C.2.1 Additional installation requirements

When installing oil-fired condensing boilers, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C2-11 of Table C.2.

### C.2.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the oil-fired condensing boiler at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C2-12 of Table C.2.

### C.2.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of oil-fired condensing boilers, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C2-13 of Table C.2.

### C.2.4 Operative competence

When installing oil-fired condensing boilers, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C2-14 of Table C.2), at the competency ratio specified in C2-16 of Table C.2.

### C.2.5 Provision of information in respect of oil-fired condensing boilers

The Retrofit Installer shall provide information identified at C2-17 of Table C.2 to the client as part of the handover process required in 6.9.

**Table C.2 – Measure-specific requirements for oil-fired condensing boilers (BSM.2)**

| Measure description   | Condensing boilers, oil-fired   |
|---|---|
| <b>Measure type</b>   | Oil-fired condensing boilers  |
| <b>C2-11 Additional installation requirements to those in Clause 4 to Clause 10</b> | <p>The requirements or guidance given in product manufacturer's instructions shall be carried out in accordance with the following standards:</p> <ul style="list-style-type: none"> <li>a) BS 5410-1;</li> <li>b) BS 5410-2; and</li> <li>c) BS 7593.</li> </ul> <p><b>NOTE</b> Attention is drawn to the need, where relevant, for all oil-firing condensing boiler installation work to comply with:</p> <ul style="list-style-type: none"> <li>a) the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation; hot water safety; combustion appliances; conservation of fuel; and power and electrical safety Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</li> <li>b) the current Water Supply (Water Fittings) Regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out; and</li> <li>c) the current edition of BS 7671.</li> </ul> |

Table C.2 – (continued)

|                     |   |
|---------------------|---|
| <p><b>C2-12</b></p> | <p><b>Pre-installation building inspection requirements</b></p> <p>The Retrofit Installer shall investigate and determine if:</p> <ul style="list-style-type: none"> <li>• the condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• the condition of the existing electrical installation is satisfactory in relation to the proposed work;</li> <li>• the installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; heat-producing appliances; conservation of fuel and power;</li> <li>• the installation work would result in non-compliance with relevant safety regulations;</li> <li>• the proposed installation would be compliant with any requirements stated by the boiler manufacturer;</li> <li>• the proposed fuel storage arrangements are compliant with regulatory requirements/recognized industry standards;</li> <li>• the proposed installation might result in a plume nuisance situation;</li> <li>• any special condensate disposal arrangements are required;</li> <li>• the dwelling is located in a hard water area (above 200 ppm);</li> <li>• water conditioning arrangements are required in relation to the water hardness;</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul> |
| <p><b>C2-13</b></p> | <p><b>Installation role</b></p> <p>Vocational competence required</p>   |
| <p><b>C2-13</b></p> | <p><b>Building Inspector</b></p> <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>C2-14</b></p> | <p><b>Operative (threshold)</b></p> <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.</p>   |
| <p><b>C2-14</b></p> | <p><b>Operative (specialist)</b></p> <p>Shall demonstrate vocational competence as defined in 3.27.<br/>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).</p>  |
| <p><b>C2-15</b></p> | <p><b>Competence currency</b></p> <p>Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.</p>   |
| <p><b>C2-16</b></p> | <p><b>Competence ratio</b></p> <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative as defined in 3.4. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p>   |

Table C.2 – (continued)

|   |  |
|---|--|
| <p><b>C2-17</b>    <b>Measure-specific information to be handed over to the client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer's installation and servicing instructions;</li> <li>• product manufacturer's user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• commissioning certificate that meets the requirements of the Building Regulations;</li> <li>• system cleaning and water treatment record (if not included in the commissioning certificate);</li> <li>• Retrofit Installer details (if not included in the commissioning certificate); <ul style="list-style-type: none"> <li>• mechanical; and</li> <li>• electrical.</li> </ul> </li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required in participating regions and will be provided within 30 days); and</li> <li>• a copy of any electrical inspection and testing certificates that have been completed to meet the requirements of Building Regulations and/or the current version of BS 7671.</li> <li>• The Retrofit Installer shall provide and demonstrate: <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user;</li> <li>• a demonstration of: <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency;</li> <li>• any safety checks that the system user should undertake; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> </li> </ul> |
|---|--|

### C.3 Measure BSM.3 – Flue-gas heat recovery devices

#### C.3.1 Additional installation requirements

When installing Flue-gas recovery devices, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C3-11 of Table C.3.

#### C.3.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the gas-fired condensing boiler at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C3-12 of Table C.3.

#### C.3.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of Flue-gas recovery devices, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C3-13 of Table C.3.

#### C.3.4 Operative competence

When installing Flue-gas recovery devices, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C3-14 of Table C.3), at the competency ratio specified in C3-16 of Table C.3.

#### C.3.5 Provision of information in respect of Flue-gas recovery devices

The Retrofit Installer shall provide information identified at C3-17 of Table C.3 to the client as part of the handover process required in 6.9.

**Table C.3 – Measure-specific requirements for Flue-gas recovery devices (BSM.3)**

| Measure description  | Flue-gas heat recovery devices for use with gas-fired condensing boilers  |
|--|---|
| Measure type   | As measure description (no sub-division)  |
| <b>C3-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p>The Retrofit Installer shall supply product manufacturer's instructions in accordance with:</p> <ul style="list-style-type: none"> <li>• BS 5440-1; and</li> <li>• BS 5440-2.</li> </ul> <p><i>NOTE Attention is drawn to the need, where relevant, for all Flue-gas recovery device installation work to comply with:</i></p> <ul style="list-style-type: none"> <li>a) <i>the current Gas Safety (Installation and Use) Regulations [13] that apply in the UK country or locality in which the installation is being carried out. The Gas Safety (Installation and Use) Regulations [13] have requirements relating to both technical gas safety standards and qualification and supervision of persons carrying out gas work and work on gas appliances;</i></li> <li>b) <i>the current Building Regulations that apply in the UK country in which the installation is being carried out. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</i></li> <li>c) <i>the current Water Supply (Water Fittings) Regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out; and</i></li> <li>d) <i>the current edition of BS 7671.</i></li> </ul> |
| <b>C3-12 Pre-installation building inspection requirements</b>   | <p>The Retrofit Installer shall investigate and determine if the:</p> <ul style="list-style-type: none"> <li>• condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; heat-producing appliances;</li> <li>• proposed installation would be compliant with any requirements stated by the flue-recovery devices product manufacturer; and</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>  |

Table C.3 – (continued)

| Installation role  | Vocational competence required  |
|--|---|
| C3-13<br>Building Inspector  | Shall demonstrate vocational competence as defined in 3.27.   |
| C3-14<br>Operative, (threshold)  | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| Operative, (specialist)  | Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).   |
| C3-15<br>Competence currency   | Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.  |
| C3-16<br>Competence ratio  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> It is recommended that vocationally competent operatives carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| C3-17<br>Measure-specific information to be handed over to the client in addition to 6.9 | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer's installation and servicing instructions;</li> <li>• product warranty information and guarantees;</li> <li>• benchmark commissioning certificate of other commissioning certificate that meets the requirements of the Building Regulations; and</li> <li>• Retrofit installer details: <ul style="list-style-type: none"> <li>• mechanical; and</li> <li>• electrical.</li> </ul> </li> </ul> <p>The Retrofit Installer shall provide an explanation of the purpose and relevance of the written information provided.</p>  |

## C.4 Measure BSM.4: Heating system insulation (ducting, pipes and cylinders)

### C.4.1 Additional installation requirements

When installing heating system insulation (ducting, pipes and cylinders), in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C4-11 of Table C.4.

### C.4.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the heating system insulation (ducting, pipes and cylinders) at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C4-12 of Table C.4.

### C.4.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of heating system insulation (ducting, pipes and cylinders), the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C4-13 of Table C.4.

### C.4.4 Operative competence

When installing heating system insulation (ducting, pipes and cylinders), the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C4-14 of Table C.4), at the competency ratio specified in C4-16 of Table C.4.

### C.4.5 Provision of information in respect of heating system insulation (pipes and cylinders)

The Retrofit Installer shall provide information identified at C4-17 of Table C.4 to the client as part of the handover process required in 6.9.

**Table C.4 – Measure-specific requirements for heating system insulation (including ducting, pipes and cylinders) (BSM.4)**

| Measure description  | Heating system insulation (ducting, pipes and cylinders) including retrofitting of insulation to existing ducting and pipework or cylinders to refurbish or enhance the system   |
|--|--|
| Measure type   | As measure description   |
| C4-11<br>Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>Where relevant to the type of installation being undertaken, the requirement or guidance given in BS 5970 shall be carried out.</p> <p><i>NOTE 1 Attention is drawn to the requirements for installation methods to be included under current certification issued by a product certification body, with respect to the productsystem to be installed, against UK requirements and regulation and the Retrofit Installer should be aware that training from the supplier or training acceptable to the supplier might be necessary before an application for assessment/certification is made to a certification body.</i></p> <p><i>NOTE 2 Attention is drawn to the need, where relevant, for all heating system insulation installation work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: fire safety; resistance to moisture; ventilation; and conservation of fuel and power. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</i></p> |

Table C.4 – (continued)

|       |   |
|-------|---|
| C4-12 | <p>The Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• if the proposed heating system insulation work would be compliant with the requirements of the Building Regulations relating to conservation of fuel and power/energy;</li> <li>• pre-existing damage to the areas to be accessed by the installation operatives;</li> <li>• the extent of the heating system elements to be insulated;</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present;</li> <li>• if the proposed installation would be non-compliant with any requirements stated by the designer/specifier; and</li> <li>• if the site layout or conditions would impair the execution of the works in relation to appropriate access to the property and to the heating system elements to be insulated.</li> </ul>   |
|       | <b>Vocational competence required</b>   |
| C4-13 | Shall demonstrate vocational competence as defined in 3.27.   |
| C4-14 | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| C4-15 | Shall demonstrate vocational competence as defined in 3.27.   |
| C4-16 | Shall be verified by the Installer at no greater than twelve-monthly intervals, as defined in 3.31.   |
| C4-17 | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ol style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ol> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p> <p>Any relevant product warranty information and guarantees.</p> |
| C4-17 | Measure-specific information to be handed over to the client in addition to 6.9   |

## C.5 Measure BSM.5 – Heating, hot water system, air conditioning or ventilation controls and components

### C.5.1 Additional installation requirements

When installing controls and/or components for heating, hot water system, air conditioning or ventilation, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C5-11 of Table C.5.

### C.5.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of controls and/or components for heating, hot water system, air conditioning or ventilation at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C5-12 of Table C.5.

### C.5.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of controls and/or components for heating, hot water system, air conditioning or ventilation, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C5-13 of Table C.5.

### C.5.4 Operative competence

When installing controls and/or components for heating, hot water system, air conditioning or ventilation, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C5-14 of Table C5), at the competency ratio specified in C5-16 of Table C.5.

### C.5.5 Provision of information in respect of heating and hot water controls

The Retrofit Installer shall provide information identified at C5-17 of Table C.5 to the client as part of the handover process required in 6.9.

**Table C.5 – Measure-specific requirements for heating, hot water system, air conditioning or ventilation controls and components (BSM.5)**

| Measure description | Heating, hot water system, air conditioning or ventilation, controls and components. |
|---------------------|--|
| Measure type        | BSM.5.1 Heating and hot water system controls (domestic)                             |
|                     | BSM.5.2 Air conditioning controls  |
|                     | BSM.5.3 Ventilation controls   |
|                     | BSM.5.4 Low energy circulator pumps  |
|                     | BSM.5.5 Low temperature radiators and fan convectors                                 |



Table C.5 – (continued)

|  |  |
|--|--|
| <p><b>C5-11</b> Additional installation requirements to those in Clause 4 to Clause 10</p> | <p>The Retrofit Installer shall supply product manufacturer's instructions in accordance with:</p> <ul style="list-style-type: none"> <li>• BS EN 378-1;</li> <li>• BS EN 378-3;</li> <li>• BS EN 378-4;</li> <li>• BS EN 14336; and</li> <li>• BS EN 16484-1.</li> </ul> <p><i>NOTE Attention is drawn to the need, where relevant, for all heating hot water air conditioning and ventilation controls installation work to comply with:</i></p> <p>a) <i>the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation; hot water safety; combustion appliances; conservation of fuel; and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</i></p> <p>b) <i>the current edition of BS 7671;</i></p> <p>c) <i>the current F gas Regulations [15] that apply in all EU countries or locality in which the installation is being carried out. The Regulations have requirements relating to businesses and persons who install, service or maintain systems that contain or are designed to contain refrigerant gases. The Regulations set both the technical standards for the Business and the qualifications and supervision of persons carrying out work; and</i></p> <p>d) <i>for the installation of Low-Temperature Heating Systems, information contained in the publication Design of low temperature domestic heating systems – A guide for system designers and installers [16] published by BRE Trust, could be of assistance.</i></p> |
| <p><b>C5-12</b> Pre-installation building inspection requirements</p>                      | <p>The Retrofit Installer shall investigate and determine if the:</p> <ul style="list-style-type: none"> <li>• proposed control arrangement is compatible with any existing controls for heating, hot water system, ventilation or air conditioning;</li> <li>• installation work would result in non-compliance with the Building Regulations;</li> <li>• proposed installation would be compliant with any requirements stated by the heating controls product manufacturer; and</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>   |

Table C.5 – (continued)

| Installation role   | Vocational competence required  |
|---|---|
| C5-13<br>Building Inspector   | Shall demonstrate vocational competence as defined in 3.27.   |
| C5-14<br>Operative (threshold)  | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| Operative (specialist)  | Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).   |
| C5-15<br>Competence currency  | Shall be verified by the Installer at no greater than 12 monthly intervals, as defined in 3.31.   |
| C5-16<br>Competence ratio   | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken;</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| C5-17<br>Measure-specific information to be handed over to the client in addition to 6.9. | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer installation and servicing instructions;</li> <li>• product manufacturer user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days), where required; and</li> <li>• a copy of any electrical inspection and testing certificates that have been completed to meet the requirements of Building Regulations and/or the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and determine:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user;</li> <li>• a demonstration of: <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency; and</li> <li>• any safety checks that the system user should undertake.</li> </ul> </li> </ul>  |

## C.6 Measure BSM.6 – Hot water systems

### C.6.1 Additional installation requirements

When installing a hot water system, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C6-11 of Table C.6.

### C.6.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the hot water system at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C6-12 of Table C.6.

### C.6.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of a hot water system, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C6-13 of Table C.6.

### C.6.4 Operative competence

When installing a hot water system, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C6-14 of Table C.6), at the competency ratio specified in C6-16 of Table C.6.

### C.6.5 Provision of information in respect of hot water systems

The Retrofit Installer shall provide information identified at C6-17 of Table C.6 to the client as part of the handover process required in 6.9.

**Table C.6 – Measure-specific requirements for hot water systems (BSM.6)**

| Measure description  | Hot water systems including hot water systems with heat recovery.  |                             |
|--|--|-----------------------------|
| Measure type   | BSM.6.1  | Hot water system (domestic) |
| C6-11<br>Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall supply product manufacturer's instructions in accordance with:</p> <ul style="list-style-type: none"> <li>• BS EN 806-1;</li> <li>• BS EN 806-4;</li> <li>• BS EN 806-5; and</li> <li>• BS 8558.</li> </ul> <p><b>NOTE</b> Attention is drawn to the need, where relevant, for all hot water system installation work to comply with:</p> <p>a) the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; hot water safety; combustion appliances and fuel storage systems; conservation of fuel and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-5 [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</p> <p>b) the current Water Supply (Water Fittings) regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out; and</p> <p>c) the current edition of BS 7671.</p> |                             |

Table C.6 – (continued)

|   |  |
|---|--|
| <p><b>C6-12</b> Pre-installation building inspection requirements</p> | <p>The Retrofit Installer shall investigate and determine if the:</p> <ul style="list-style-type: none"> <li>• condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• proposed hot water system arrangement is compatible with the existing heating and hot water system installation and fittings;</li> <li>• installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; hot water safety; combustion appliances and fuel storage systems; conservation of fuel and power; or electrical safety;</li> <li>• proposed installation would be compliant with any requirements stated by the hot water system product manufacturers; and</li> <li>• asbestos register for the dwelling has been reviewed and relevant checks have been undertaken to determine if any materials containing asbestos are present in the areas where work is to be carried out.</li> </ul>   |
| <p><b>Installation role</b></p>                                       | <p><b>Vocational competence required</b></p>   |
| <p><b>C6-13</b> Building Inspector</p>                                | <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>C6-14</b> Operative (threshold)<br/>Operative (specialist)</p>  | <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.<br/>Shall demonstrate vocational competence as defined in 3.27.<br/>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).</p>   |
| <p><b>C6-15</b> Competence currency</p>                               | <p>Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.</p>  |
| <p><b>C6-16</b> Competence ratio</p>                                  | <p>For each installation task to be undertaken, the Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ol style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ol> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competence ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |

Table C.6 – (continued)

|  |  |
|--|--|
| <p><b>C6-17</b> Measure-specific information to be handed over to the client in addition to 6.9.</p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer installation and servicing instructions;</li> <li>• product manufacturer user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• revisions to the building Health and Safety file;</li> <li>• revisions to the building log book;</li> <li>• a commissioning certificate that meets the requirements of the Building Regulations;</li> <li>• a user guide that meets the requirements of the Building Regulations;</li> <li>• Building Regulations compliance certificate or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days, where required; and</li> <li>• a copy of any electrical inspection and testing certificates that have been completed to meet the requirements the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and determine:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user; and</li> <li>• a demonstration of: <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency;</li> <li>• any safety checks that the system user should undertake;</li> <li>• any maintenance activity that the system user should undertake; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |
|--|--|

## C.7 Measure BSM.8 – Mechanical ventilation with heat recovery

### C.7.1 Additional installation requirements

When installing a mechanical ventilation with heat recovery (MVHR) system, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also work to any standards, specifications, instructions or guidance identified in C7-11 of Table C.7.

### C.7.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the mechanical ventilation and heat recovery system at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C7-12 of Table C.7.

### C.7.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of a mechanical ventilation and heat recovery system, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C7-13 of Table C.7.

### C.7.4 Operative competence

When installing a mechanical ventilation and heat recovery system, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C7-14 of Table C.7), at the competency ratio specified in C7-16 of Table C.7.

### C.7.5 Provision of information in respect of Mechanical Ventilation and Heat Recovery systems

The Retrofit Installer shall provide information identified at C7-17 of Table C.7 to the client as part of the handover process required in 6.9.

**Table C.7 – Measure-specific requirements for mechanical ventilation with heat recovery (BSM.7)**

| Measure description  | Mechanical ventilation with heat recovery   |
|--|---|
| Measure type   | As measure description (no sub-division)  |
| C7-11<br>Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall supply guidance from the product manufacturer's instructions.</p> <p><b>NOTE Attention is drawn to the need, where relevant, for all Mechanical Ventilation and Heat Recovery installation work to comply with:</b></p> <ol style="list-style-type: none"> <li>1) <i>the current Building Regulations are those that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation, conservation of fuel and power and electrical safety</i> Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-5 [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10]; and</li> <li>2) <i>the current edition of BS 7671.</i></li> </ol> |
| C7-12<br>Pre-installation building inspection requirements   | <p>The Retrofit Installer shall investigate and determine if:</p> <ul style="list-style-type: none"> <li>• the condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• the installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation; conservation of fuel and power;</li> <li>• the proposed duct work (routing) is appropriate;</li> <li>• the proposed installation would be compliant with any requirements stated by the equipment manufacturers; and</li> <li>• the asbestos register for the dwelling has been reviewed and relevant checks have been undertaken to determine if any materials containing asbestos are present in the areas where work is to be carried out.</li> </ul>   |

Table C.7 – (continued)

| Installation role           | Vocational competence required  |
|-----------------------------|---|
| C7-13 Building Inspector    | Shall demonstrate vocational competence as defined in 3.27.   |
| C7-14 Operative (threshold) | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| Operative (specialist)      | Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4)  |
| C7-15 Competence currency   | Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.  |
| C7-16 Competence ratio      | For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the: <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |

Table C.7 – (continued)

|   |   |
|---|---|
| <p><b>C7-17</b>    <b>Measure-specific information to be handed over to the Client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer installation and servicing instructions;</li> <li>• product manufacturer user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• revisions to the building Health and Safety file;</li> <li>• revisions to the building log book;</li> <li>• commissioning records that confirm that the system is balanced and the air supply or extract rates from each room are within 5% of the rates specified in the design;</li> <li>• a commissioning certificate that meets the requirements of the Building Regulations;</li> <li>• a user guide that meets the requirements of the Building Regulations;</li> <li>• Retrofit Installer details (if not included in the commissioning certificate), e.g. mechanical, electrical;</li> <li>• evidence that the installation has been notified to Building Control; and</li> <li>• a copy of any electrical inspection and testing certificates that have been completed to meet the requirements the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and determine:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of which controls/components should not be adjusted by the system user; and</li> <li>• a demonstration of:             <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency;</li> <li>• any safety checks that the system user should undertake; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |
|---|---|



## C.8 Measure BSM.8 – Under-floor heating

### C.8.1 Additional installation requirements

When installing under-floor heating, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C8-11 of Table C.8.

### C.8.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the under-floor heating at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C8-12 of Table C.8.

### C.8.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of under-floor heating, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C8-13 of Table C.8.

### C.8.4 Operative competence

When installing under-floor heating, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C8-14 of Table C.8), at the competency ratio specified in C8-16 of Table C.8.

### C.8.5 Provision of information in respect of under-floor heating

The Retrofit Installer shall provide information identified at C8-17 of Table C.8 to the client as part of the handover process required in 6.9.

**Table C.8 – Measure-specific requirements for under-floor heating (BSM.8)**

| Measure description  | Under-floor heating (wet systems)   |
|--|---|
| Measure type   | As measure description  |
| C8-11<br>Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall supply product manufacturer's instructions in accordance with BS EN 1264-4.</p> <p><b>NOTE Attention is drawn to the need, where relevant, for all under-floor heating system work to comply with:</b></p> <ul style="list-style-type: none"> <li>a) <i>the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; ventilation; sanitation; hot water safety; water efficiency; conservation of fuel and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</i></li> <li>b) <i>the current Water Supply (Water Fittings) Regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: prevention of contamination of the wholesome water supply, energy conservation, safe operation, testing and commissioning; and</i></li> <li>c) <i>the current edition of BS 7671.</i></li> </ul> |

Table C.8 – (continued)

|   |  |
|---|--|
| <p><b>C8-12</b> Pre-installation building inspection requirements</p> | <p>The Retrofit Installer shall investigate and determine if the:</p> <ul style="list-style-type: none"> <li>• structural precondition requirements to enable the installation to proceed have been met;</li> <li>• pipe circuit lengths are broadly appropriate in relation to room area and pipe spacing;</li> <li>• under-floor heating layout design has taken account of the location of all fixtures to avoid overheating issues;</li> <li>• proposed location of the under-floor heating manifold(s) is appropriate;</li> <li>• installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; conservation of fuel and power;</li> <li>• proposed installation would be non-compliant with any requirements stated by the under-floor heating product manufacturer; and</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>  |
| <p><b>Installation role</b></p>                                       | <p><b>Vocational competence required</b></p>   |
| <p><b>C8-13</b> Building Inspector</p>                                | <p>Shall demonstrate vocational competence as defined in 3.27.</p>   |
| <p><b>C8-14</b> Operative (threshold)</p>                             | <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.</p>  |
| <p><b>Operative (specialist)</b></p>                                  | <p>Shall demonstrate vocational competence as defined in 3.27.<br/>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).</p>  |
| <p><b>C8-15</b> Competence currency</p>                               | <p>To be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.</p>   |
| <p><b>C8-16</b> Competence ratio</p>                                  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ol style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ol> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.<br/>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |

Table C.8 – (continued)

|   |   |
|---|---|
| <p><b>C8-17</b> Measure-specific information to be handed over to the client in addition to 6.9</p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer's user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• testing and commissioning certificates;</li> <li>• water treatment records;</li> <li>• electrical certification, if relevant;</li> <li>• Building Regulations Compliance Certificate;</li> <li>• Retrofit installer details: <ul style="list-style-type: none"> <li>• mechanical;</li> <li>• electrical; and</li> </ul> </li> <li>• diagrammatic information: <ul style="list-style-type: none"> <li>• hydraulic schematic;</li> <li>• wiring schematic;</li> </ul> </li> <li>• verbal information/demonstration;</li> <li>• setting of controls;</li> <li>• awareness of the effect that changing to a different type of floor covering might have on system output; and</li> <li>• awareness of which system components should only be adjusted by a competent engineer.</li> </ul> |
|---|---|

## C.9 Measure BSM.9 – Warm-air heating systems

### C.9.1 Additional installation requirements

When installing gas and/or oil-fired warm-air heating systems (domestic and non-domestic), in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also work to any standards, specifications, instructions or guidance identified in **C9-11** of **Table C.9**.

### C.9.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the gas and/or oil-fired warm-air heating systems (domestic and non-domestic) at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in **C9-12** of **Table C.9**.

### C.9.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of gas and/or oil-fired warm-air heating systems (domestic and non-domestic), the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of **C9-13** of **Table C.9**.

### C.9.4 Operative competence

When installing gas and/or oil-fired warm-air heating systems (domestic and non-domestic), the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (**C9-14** of **Table C.9**), at the competency ratio specified in **C9-16** of **Table C.9**.

### C.9.5 Provision of information in respect of gas-fired warm-air heating systems

The Retrofit Installer shall provide information identified at **C9-17** of **Table C.9** to the client as part of the handover process required in **6.9**.

**Table C.9 – Measure-specific requirements for gas and/or oil-fired warm-air heating systems (domestic and non-domestic) (BSM.9)**

| Measure description  | Gas and/or oil-fired warm-air heating systems   |  |
|--|---|--|
| Measure type   | BSM.9.1   | Natural gas-fired and liquefied petroleum gas-fired warm-air heating systems |
|  | BSM.9.2   | Oil-fired warm-air heating systems   |
| <b>C9-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)</b> | <p><b>NOTE</b> <i>Electric warm-air heating systems are provided for under measure BSE.1 Electric storage heaters (see D.1)</i></p> <p>The Retrofit Installer shall supply product manufacturer's instructions in accordance with:</p> <ul style="list-style-type: none"> <li>a) BS 5410-1;</li> <li>b) BS 5440-1;</li> <li>c) BS 5440-2;</li> <li>d) BS 5864;</li> <li>e) BS 6891;</li> <li>f) IGENM/UP7;</li> <li>g) UKLPG Code of practice 22, Design, installation and testing of LPG piping systems;</li> <li>h) IGENM UP/1, 1A &amp; 1B; and</li> <li>i) The Domestic Building Services Compliance Guide [N1].</li> </ul> |  |

Table C.9 – (continued)

|              |   |
|--------------|---|
|              | <p><b>NOTE</b> Attention is drawn to the need, where relevant, for all gas-fired warm-air heating system installation work to comply with:</p> <p>a) the current Gas Safety (Installation and Use) Regulations [13] that apply in the UK country or locality in which the installation is being carried out. The Gas Safety (Installation and Use) Regulations [13] have requirements relating to both technical gas safety standards and qualification and supervision of persons carrying out gas work and work on gas appliances;</p> <p>b) the current Building Regulations that apply in the UK country in which the installation is being carried out. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</p> <p>c) the current Water Supply (Water Fittings) Regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out; and</p> <p>d) the current edition of BS 7671.</p> |
| <b>C9-12</b> | <p><b>Pre-installation building inspection requirements</b></p> <p>The Retrofit Installer shall investigate and determine:</p> <ul style="list-style-type: none"> <li>• if the condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• if the installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; heat producing appliances; conservation of fuel and power;</li> <li>• where applicable, if the installation work would result in non-compliance with relevant gas safety regulations;</li> <li>• if the proposed installation would be compliant with any requirements stated by the gas and/or oil-fired warm-air heating systems product manufacturer;</li> <li>• the likelihood of the proposed installation resulting in a plume nuisance situation;</li> <li>• if any special condensate disposal arrangements are required; and</li> <li>• if relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>   |
|              | <b>Vocational competence required</b>   |
| <b>C9-13</b> | <b>Building Inspector</b><br>Shall demonstrate vocational competence as defined in 3.27.  |
| <b>C9-14</b> | <b>Operative (threshold)</b><br>Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
|              | <b>Operative (specialist)</b><br>Shall demonstrate vocational competence as defined in 3.27.<br>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).  |
| <b>C9-15</b> | <b>Competence currency</b><br>Shall be verified by the installer at no greater than twelve-monthly intervals, as defined in 3.31.   |

Table C.9 – (continued)

|   |   |
|---|---|
| <p><b>C8-16</b>      <b>Competence ratio</b></p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken;</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competence ratio to be applied.</i></p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p>   |
| <p><b>C9-17</b>      <b>Measure-specific information to be handed over to the client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer’s installation and servicing instructions;</li> <li>• product manufacturer’s user manuals/guides;</li> <li>• product warranty information and guarantees;</li> <li>• commissioning certificate that meets the requirements of the Building Regulations;</li> <li>• Retrofit Installer details (if not included in the commissioning certificate):             <ul style="list-style-type: none"> <li>• mechanical; and</li> <li>• electrical.</li> </ul> </li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days);</li> <li>• a copy of any electrical inspection and testing certificates that have completed to meet the requirements of Building Regulations and/or the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and determine:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of what controls/components should not be adjusted by the system user; and</li> <li>• a demonstration of:             <ul style="list-style-type: none"> <li>• how to set user controls for maximum efficiency;</li> <li>• any safety checks that the system user should undertake; and</li> <li>• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |

## C.10 Measure BSM.10 Water efficient taps and showers

### C.10.1 Additional installation requirements

When installing water efficient taps and showers, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in C10-11 of Table C.10.

### C.10.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the water efficient taps and showers at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in C10-12 of Table C.10.

### C.10.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of water efficient taps and showers, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of C10-13 of Table C.10.

### C.10.4 Operative competence

When installing water efficient taps and showers, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (C10-14 of Table C.10), at the competency ratio specified in C10-16 of Table C.10.

### C.10.5 Provision of information in respect of Water efficient taps and showers

The Retrofit Installer shall provide information identified at C10-17 of Table C.10 to the client as part of the handover process required in 6.9.

**Table C.10 – Measure-specific requirements for water efficient taps and showers (BSM.10)**

| Measure description  | Water efficient taps and showers excluding taps for cold water only (sanitary tapware, e.g. showers, pillar taps, mixing taps, etc.)  |
|--|---|
| Measure type   | As measure description (no sub-division)  |
| C10-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall supply guidance from the product manufacturer's instructions.</p> <p><b>NOTE Attention is drawn to the need, where relevant, for all hot water system installation work to comply with:</b></p> <ol style="list-style-type: none"> <li>1) the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, compliance in relation to the following aspects is highlighted: workmanship; materials; resistance to moisture; hot water safety and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10];</li> <li>2) the current Water Supply (Water Fittings) regulations or Water Byelaws [14] that apply in the UK country in which the installation is being carried out. Particular guidance can be found in WRAS water regulations guide [17]; and</li> <li>3) the current edition of BS 7671.</li> </ol> |

Table C.10 – (continued)

|   |   |
|---|---|
| <p><b>C10-12</b><br/><b>Pre-installation building inspection requirements</b></p>                               | <p>The Retrofit Installer shall investigate and assess if the:</p> <ul style="list-style-type: none"> <li>• condition of the existing water supply and sanitary tapware installation is satisfactory in relation to the proposed work;</li> <li>• condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• existing or proposed water supply system is compatible with the sanitary tapware to be installed;</li> <li>• sanitary tapware installation work would result in non-compliance with the building regulations in relation to workmanship; materials and sanitation, hot water safety and water efficiency;</li> <li>• sanitary tapware installation work would result in non-compliance with the water regulations in relation to waste, misuse, undue consumption or contamination or erroneous measurement of the water supplied; and</li> <li>• proposed installation would be compliant with any requirements stated by the sanitary tapware product manufacturer.</li> </ul>  |
| <p><b>Pre-installation building inspection requirements</b></p>   |   |
| <p><b>C10-13</b><br/><b>Building Inspector</b></p>  | <p>Shall demonstrate vocational competence as defined in 3.27.</p>  |
| <p><b>C10-14</b><br/><b>Operative (threshold)</b><br/><b>Operative (specialist)</b></p>                         | <p>Shall demonstrate that vocational competence is being acquired as defined in 3.28.<br/>Shall demonstrate vocational competence as defined in 3.27.<br/>For electrical installation work, vocational competence (3.27) through EAS compliance (3.4).</p>  |
| <p><b>C10-15</b><br/><b>Competence currency</b></p>   | <p>Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.</p>   |
| <p><b>C10-16</b><br/><b>Competence ratio</b></p>  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ol style="list-style-type: none"> <li>range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ol> <p><b>NOTE 1</b> <i>Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</i><br/>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.<br/><b>NOTE 2</b> <i>Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</i></p> |
| <p><b>C10-17</b><br/><b>Measure-specific information to be handed over to the Client in addition to 6.9</b></p> | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer installation and servicing instructions;</li> <li>• product manufacturer user manuals/guides; and</li> <li>• product warranty information and guarantees.</li> </ul> <p>The Retrofit Installer shall provide:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance of the written information provided;</li> <li>• an explanation of the product controls;</li> <li>• how the controls affect the efficiency of water delivery and how that impacts on the efficiency of the hot water supply; and</li> <li>• any safety requirements that the user should regularly undertake.</li> </ul>  |



## Annex D (normative) BSE energy efficiency measures

### D.1 Measure BSE.1 – Electric storage heaters (including electric warm-air heating units that incorporate heat storage)

#### D.1.1 Additional installation requirements

When installing electric storage heaters, in addition to meeting the core requirements set out in Clause 4 to Clause 10 of this PAS, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in D1-11 of Table D.1.

#### D.1.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of the electric storage heaters at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in D1-12 of Table D.1.

#### D.1.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of electric storage heaters, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of D1-13 of Table D.1.

#### D.1.4 Operative competence

When installing electric storage heaters, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (D1-14 of Table D.1), at the competency ratio specified in D1-16 of Table D.1.

#### D.1.5 Provision of information in respect of electric storage heaters

The Retrofit Installer shall provide information identified at D1-17 of Table D.1 to the client as part of the handover process required in 6.9.

**Table D.1 – Measure-specific requirements for electric storage heaters (BSE.1)**

| Measure description   | Electric storage heaters (including electric warm air heating units that incorporate heat storage and high heat retention storage heaters)   |   |
|---|--|---|
| Measure type  | BSE.1.1  | Domestic electric storage heaters                                     |
|   | BSE.1.2  | Domestic electric storage heaters with warm-air heat distribution     |
|   | BSE.1.3  | Non-domestic electric storage heaters with warm-air heat distribution |
| D1-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall take responsibility for:</p> <ul style="list-style-type: none"> <li>• following the requirements of guidance given in product manufacturer's instructions; and</li> <li>• ensuring all electric storage heater work complies with the current edition of BS 7671.</li> </ul> |   |

Table D.1 – (continued)

|       |   |  |
|-------|---|--|
| D1-12 | Pre-installation building inspection requirements | <p>The Retrofit Installer shall investigate and determine if the:</p> <ul style="list-style-type: none"> <li>• condition of the existing electrical installation is satisfactory in relation to the proposed work;</li> <li>• condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; conservation of fuel and power and electrical safety;</li> <li>• storage heater installation work would result in non-compliance with BS 7671;</li> <li>• proposed installation would be non-compliant with any requirements set by the storage heater product manufacturer; and</li> <li>• relevant checks have been undertaken to determine if asbestos containing materials are present.</li> </ul>  |
|       | Installation role                                 | Vocational competence required   |
| D1-13 | Building Inspector                                | Shall demonstrate vocational competence (3.27) through EAS compliance (3.4).   |
| D1-14 | Operative (threshold)                             | Shall demonstrate that vocational competence is being acquired as defined in 3.28.   |
|       | Operative (specialist)                            | Shall demonstrate vocational competence (3.27) through EAS compliance (3.4).   |
| D1-15 | Competence currency                               | Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.   |
| D1-16 | Competence ratio                                  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio (see 3.29) shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Retrofit Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |

Table D.1 – (continued)

|       |  |
|-------|--|
| D1-17 | <p data-bbox="240 226 272 1644"><b>Measure-specific information to be handed over to the Client in addition to 6.9</b></p> <p data-bbox="272 226 288 1644">The Retrofit Contactor shall handover:</p> <ul data-bbox="288 226 560 1644" style="list-style-type: none"> <li data-bbox="288 226 336 1644">• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days) as relevant to the requirements of the Building Regulations;</li> <li data-bbox="336 226 384 1644">• a copy of any electrical inspection and testing certificates that have completed to meet the requirements of Building Regulations and/or the current version of BS 7671;</li> <li data-bbox="384 226 432 1644">• product manufacturer's installation and servicing instructions;</li> <li data-bbox="432 226 480 1644">• any manufacturer or product data or information sheets;</li> <li data-bbox="480 226 528 1644">• product warranty information and guarantees; and</li> <li data-bbox="528 226 560 1644">• commissioning certificate that meets the requirements of the Building Regulations.</li> </ul> <p data-bbox="560 226 576 1644">The Retrofit Installer shall provide and determine:</p> <ul data-bbox="576 226 821 1644" style="list-style-type: none"> <li data-bbox="576 226 624 1644">• an explanation of the purpose and relevance the written information provided;</li> <li data-bbox="624 226 671 1644">• an explanation of which controls/components should not be adjusted by the system user;</li> <li data-bbox="671 226 719 1644">• a demonstration of: <ul data-bbox="719 226 821 1644" style="list-style-type: none"> <li data-bbox="719 226 767 1644">• how to set user controls for maximum efficiency, including an explanation of tariffs;</li> <li data-bbox="767 226 815 1644">• any safety checks that the system user should undertake; and</li> <li data-bbox="815 226 821 1644">• what to do in the case of an emergency or perceived emergency.</li> </ul> </li> </ul> |
|-------|--|

## D.2 Measure BSE.2 Lighting fittings, lighting systems and lighting system controls

### D.2.1 Additional installation requirements

When installing lighting fittings, systems and/or controls, in addition to meeting the core requirements set out in Clause 4 to Clause 10, the Retrofit Installer shall also comply with any standards, specifications, instructions or guidance identified in D2-11 of Table D.2.

### D.2.2 Pre-installation building inspection requirements

Prior to commencing the physical installation of lighting fittings, systems and/or controls at location, the Retrofit Installer shall undertake a pre-installation building inspection in accordance with the requirements set out in Section D2-12 of Table D.2.

### D.2.3 Inspector competence

When undertaking a pre-installation building inspection in respect of the installation of lighting fittings, systems and/or controls, the Retrofit Installer shall only employ or contract an inspector meeting the competence requirements of D2-13 of Table D.2.

### D.2.4 Operative competence

When installing lighting fittings, systems and/or controls, the Retrofit Installer shall only employ or contract operatives with the required level of competence attained through one of the permitted routes (D2-14 of Table D.2) at the competency ratio specified in D2-16 of Table D.2.

### D.2.5 Provision of information in respect of lighting fittings

The Retrofit Installer shall provide information identified at D2-17 of Table D.2 to the client as part of the handover process required in 6.9.

**Table D.2 – Measure-specific requirements for lighting fittings, lighting systems and lighting system controls (BSE.2)**

| Measure description   | Lighting fittings, lighting systems and lighting system controls  |
|---|---|
| Measure type  | BSE.2.1 Lighting fittings   |
| D2-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10) | <p>The Retrofit Installer shall supply guidance from the product manufacturer's instructions.</p> <p><b>NOTE 1</b> Attention is drawn to the need for all lighting fittings work to comply with the current Building Regulations that apply in the UK country in which the installation is being carried out. In particular, the need for compliance in relation to the following aspects is highlighted: workmanship; materials; structural stability; fire safety; resistance to moisture; conservation of fuel and power and electrical safety. Further guidance on the requirements of the Building Regulations in England is provided in Approved Documents A-S [6] and Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Wales is provided in Approved Documents A-R [8] and guidance on Regulation 7: Workmanship and Materials [7]. Further guidance on the requirements of the Building Regulations in Scotland is provided in the Domestic Technical Handbook [9] and Non-Domestic Technical Handbook [10].</p> <p><b>NOTE 2</b> Attention is drawn to the need for all work relating to non-domestic electrical work to comply with the Electricity at Work Regulations [18].</p> |
| D2-12 Pre-installation building inspection requirements   | <p>The Retrofit Installer shall investigate and assess if the:</p> <ul style="list-style-type: none"> <li>• condition of the existing electrical installation is satisfactory in relation to the proposed work;</li> <li>• condition of the building fabric is satisfactory in relation to the proposed work;</li> <li>• existing or proposed lighting control arrangement is compatible with the lighting fittings, systems and/or controls to be installed;</li> <li>• installation work would result in non-compliance with the Building Regulations in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; conservation of fuel and power and electrical safety;</li> <li>• installation work would result in non-compliance with the IET Wiring Regulations;</li> <li>• proposed installation would be non-compliant with any requirements stated by the product or system manufacturer; and</li> <li>• relevant checks have been undertaken to determine if materials containing asbestos are present.</li> </ul>  |

Table D.2 – (continued)

| Installation role  | Vocational competence required  |
|--|---|
| D2-13<br>Building Inspector  | Shall demonstrate vocational competence (3.27) through EAS compliance (3.4).  |
| D2-14<br>Operative (threshold)   | Shall demonstrate that vocational competence is being acquired as defined in 3.28.  |
| D2-15<br>Operative (specialist)  | Shall demonstrate vocational competence (3.27) through EAS compliance (3.4).  |
| D2-15<br>Competence currency   | Shall be verified by the Retrofit Installer at no greater than twelve-monthly intervals, as defined in 3.31.  |
| D2-16<br>Competence ratio  | <p>For each installation task to be undertaken, the Retrofit Installer shall employ or subcontract at the particular location, at least one vocationally competent operative. For each installation, the vocational competence ratio as defined in 3.29 shall be determined by the Retrofit Installer in relation to the:</p> <ul style="list-style-type: none"> <li>a) range, scale, geographical spread and complexity of the work being undertaken; and</li> <li>b) supervision and experience of the individual that meets the vocational competence requirements for the relevant tasks and the relative experience of the operatives being supervised.</li> </ul> <p><b>NOTE 1</b> Where a vocationally competent operative is newly qualified, it might be appropriate for a lower competency ratio to be applied.</p> <p>For each installation task to be undertaken at a particular location, supervision, inspection and confirmation of compliance of all work undertaken in respect of that task at that location shall be undertaken by a vocationally competent operative appointed by the Installer to do so.</p> <p><b>NOTE 2</b> Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.</p> |
| D2-17<br>Measure-specific information to be handed over to the client in addition to 6.9 | <p>The Retrofit Installer shall handover:</p> <ul style="list-style-type: none"> <li>• product manufacturer's installation and maintenance instructions;</li> <li>• product warranty information and guarantees;</li> <li>• Building Regulations compliance certificate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days) as relevant to the requirements of the Building Regulations; and</li> <li>• a copy of any electrical inspection and testing certificates that have completed to meet the requirements of Building Regulations and/or the current version of BS 7671.</li> </ul> <p>The Retrofit Installer shall provide and determine:</p> <ul style="list-style-type: none"> <li>• an explanation of the purpose and relevance the written information provided;</li> <li>• how to set user controls for maximum efficiency;</li> <li>• an explanation of which controls/components should not be adjusted by the system user; and</li> <li>• where end-user maintenance is possible, details of how to undertake the maintenance including details of where to obtain any recommended product or tools.</li> </ul>   |

# Annex E (Informative) PAS 2030:2017 to PAS 2030:2019 – Substantive changes

Table E.1 – Substantive changes introduced in PAS 2030:2019

| PAS 2030 clause reference                | Nature of changes   |
|--|---|
| 2017                                     | 2019  |
| <b>Foreword</b>                          | <b>Foreword</b>   |
|  | Explains that PAS 2030 has been updated to align with PAS 2035 <i>Retrofitting Dwellings for Improved Energy Efficiency: Specification and Guidance</i> which is applicable only to dwellings. Consequently, PAS is no longer applicable to non-dwellings, and may only be used in conjunction with PAS 2035.<br>Other minor editorial changes.   |
| <b>Introduction</b>                      | <b>Introduction</b>   |
|  | Explains the most significant areas of change to PAS 2030: <ul style="list-style-type: none"> <li>removal of guidance about the scope and content of designs for EEMs, which has been moved to PAS 2035;</li> <li>removal of guidance about the interactions between EEMs (except for the <i>Measures Interaction Matrix</i>), which has been moved to PAS 2035;</li> <li>removal of guidance about assessment and upgrading of existing ventilation systems, which has been moved to PAS 2035; and</li> <li>for demonstration of competence, requirement for the use of regulated and industry agreed vocational qualifications or apprenticeships, personal certificates of competence relevant to the EEM to be installed or for electrical work, compliance with the EAS to replace the reliance on Minimum Technical Competencies that was applicable in earlier editions.</li> </ul> Other minor editorial changes. |
| <b>1 Scope</b>                           | <b>1 Scope</b>  |
|  | Modified to reflect changes to the detail and structure of the revised PAS 2030. Includes reference to the addition of retrofit design validation requirements and to the amended annexes.  |
| <b>2 Normative references</b>            | <b>2 Normative references</b>   |
|  | Updated and made consistent with PAS 2035.  |
| <b>3 Terms and definitions</b>           | <b>3 Terms and definitions</b>  |
|  | Updated and made consistent with PAS 2035.  |
| <b>4 Retrofit project management</b>     | <b>4 Retrofit project management</b>  |
|  | Introduces a new requirement for the Retrofit Coordinator whose appointment is required by PAS 2035 to be identified to the Retrofit Installer and given access to the installation work to inspect progress and quality.   |
| <b>5 Retrofit Design</b>                 | <b>5 Retrofit Design</b>  |
|  | New requirement for the Retrofit Installer to use a retrofit design that complies with PAS 2035. Clarification about the use of subcontractor and some minor editorial changes (see 5.6).   |
| <b>4 Installation process</b>            | <b>6 Installation process</b>   |
|  | Updated requirements for validation of the PAS 2035-compliant retrofit design, for briefing of operatives by the Retrofit Coordinator and for testing, commissioning and handover.<br>Changes to requirements in relation to 'business and financial probity (see 6.9), clarifying/enhancing requirements for product liability insurance, guarantees and warranties and for clarity of contractual liability where Installers are contracted on a design and build basis.  |
| <b>5 Installation process management</b> | <b>7 Installation process management</b>  |
|  | Minor editorial changes for clarification and ease of understanding.<br>New requirements added for proposed changes to the retrofit design to be referred to the Retrofit Coordinator for approval, and for photographic records to be made of installation work.   |

Table E.1 – (continued)

| PAS 2030 clause reference   | Nature of changes   |
|---|---|
| 2017  | 2019  |
| 6 Service provision   | 8 Service provision   |
| 7 Claims of conformity  | 9 Claims of conformity  |
| 8 Documents essential to the application of the annexes of this PAS | 10 Documents essential to the application of the annexes of this PAS      |
| Annex A Energy efficiency measures/ types with PAS references       | Annex A Measure-specific Annex selection and co-installation requirements |

Minor editorial changes for clarification and ease of understanding.

Specified claim enhanced to include and clarify responsibility for the retrofit design.

Existing references confirmed or updated where necessary. Additional references added for Fenestration. Statement included with regard to on-going reliance on MTC Annexes NOS and NVQ for competence requirements. Additional and updated references to new insulation guidance documents added.

Annex A still contains the definitive list of included measures and measure types and an updated matrix providing information about the interaction and potential conflict between measures installed in the same building. Additional information has been included in respect of thermal bridging.

Requirements to assess and, if necessary, upgrade ventilation in buildings where the installation of one or more EEM has improved the airtightness have been moved to PAS 2035.

The following non-domestic measures, and their annexes, have been removed from this PAS:

- chillers (previously Annex C.1);
- non-domestic heating and hot water system controls (previously part of Annex C.6);
- non-domestic hot water systems (previously part of Annex C.7);
- non-domestic ventilation systems with heat recovery (previously part of Annex C.8);
- radiant heating (previously Annex C.9);
- non-domestic electric storage heaters (previously part of Annex D.1);
- non-domestic electric storage heaters with warm-air heat distribution (previously part of Annex D.1);
- variable-speed drives for fans and pumps (previously Annex D.3); and
- non-domestic light fittings, lighting systems and controls (previously part of Annex D.1);

Consequently, most sections of Annexes C and D have been **re-numbered**, as summarized in **Table A.2** and **Table A.3**.

Table E.1 – (continued)

| PAS 2030 clause reference |                | Nature of changes   |
|---------------------------|----------------|---|
| 2017                      | 2019           |   |
| <b>Annex B</b>            | <b>Annex B</b> | <p>Annex <b>B.1</b> Significant change in respect of pre-installation building inspection requirements.</p> <p>Annex <b>B.3</b> Additional cross references added for Fenestration. Adjustment to routes to competence.</p> <p>Annexes <b>B.4</b>, <b>B.7</b> and <b>B.8</b>. Significant changes, particularly with regard to Installer responsibilities in respect of design/ specification.</p> <p>Annex <b>B.12</b> Flexible thermal linings no longer included.</p> <p>New Annex <b>B.12</b> Annex for Room-in Roof Insulation (RIR) included.</p> <p>New Annex <b>B.13</b> for Insulation of Park Homes included.</p> <p>Other annexes some minor editorial changes.</p>  |
| <b>Annex C</b>            | <b>Annex C</b> | <p>Updating of NOS references. Some minor editorial changes.</p> <p>The following non-domestic measures, and their annexes, have been removed from this PAS:</p> <ul style="list-style-type: none"> <li>• Chillers (previously Annex <b>C.1</b>);</li> <li>• Non-domestic heating and hot water system controls (previously part of Annex <b>C.6</b>);</li> <li>• Non-domestic hot water systems (previously part of Annex <b>C.7</b>);</li> <li>• Non-domestic ventilation systems with heat recovery (previously part of Annex <b>C.8</b>); and</li> <li>• Radiant heating (previously Annex <b>C.9</b>).</li> </ul> <p>Consequently, most sections of Annex C have been <b>re-numbered</b>, as summarized in <b>Table A.2</b>.</p>             |
| <b>Annex D</b>            | <b>Annex D</b> | <p>Updating of NOS references Some minor editorial changes.</p> <p>The following non-domestic measures, and their annexes, have been removed from this PAS:</p> <ul style="list-style-type: none"> <li>• Non-domestic electric storage heaters (previously part of Annex <b>D.1</b>);</li> <li>• Non-domestic electric storage heaters with warm-air heat distribution (previously part of Annex <b>D.1</b>);</li> <li>• Non-domestic light fittings, lighting systems and controls (previously part of Annex <b>D.2</b>); and</li> <li>• Variable-speed drives for fans and pumps (previously Annex <b>D.3</b>).</li> <li>• Consequently, most sections of Annexes D have been <b>re-numbered</b>, as summarized in <b>Table A.3</b>.</li> </ul> |
| <b>Annex E</b>            | <b>Annex E</b> | Annex updated to provide comparison between PAS 2030:2017 and PAS 2030:2019 and identifying salient points of change.   |
| <b>Annex F</b>            | <b>Annex F</b> | Annex providing guidance on the application of PAS 2030:2019.   |
| <b>Annex G</b>            | <b>Annex G</b> | Example “installation project information collation form”, modified to reflect the changes introduced by 2019 revision.   |



## Annex F (informative)

# Retrofit Installer guidance on the use and application of PAS 2030

### F.1 Overview

In addition to setting out requirements to be met by Retrofit Installers in undertaking the installation of EEM in existing buildings, PAS 2030 presents a logical approach to such activity, providing a suggested sequence of actions that if followed, should enable the Retrofit Installer to demonstrate that all required actions have been undertaken in compliance with the PAS requirements.

Before making use of PAS 2030, it is important that Retrofit Installers understand that this PAS is prepared against the assumption that a retrofit design compliant with PAS 2035:2023 has been made available to the Retrofit Installer, and that a Retrofit Coordinator has been assigned to the project (as required by PAS 2035:2023). It is expected that the retrofit design will be based on an assessment of the dwelling(s) and will be functionally and environmentally compatible with the designated building(s) and with any other EEM that are already installed or might later be installed in the same building(s).

It is acknowledged that in some situations, the dwelling(s) assessment and the preparation of a PAS 2035:2023 compliant retrofit design could be undertaken by the same organization as that undertaking the EEM installation, but in other circumstances this might not be so and to accommodate this fundamental difference in approach, PAS 2030 treats the installation process as being wholly independent of those of assessment and retrofit design.

For this reason, the PAS 2030 installation process begins with a detailed review of the content and relevance of the retrofit design, leading to an inspection of the designated building (the pre-installation building inspection) to enable the Retrofit Installer to confirm that what has been specified in the retrofit design is complete, appropriate for the building concerned, technically feasible and capable of delivering the intended efficiencies.

The PAS includes specific instruction that where the circumstances or conditions at the building are not as provided for in the retrofit design, the Installer is required to refer such matters back to the Retrofit Coordinator for resolution. It might be that the Retrofit Coordinator seeks contribution from the Installer in the determination of corrective action, but this is not a requirement of PAS 2030 and such contribution is outside the remit of this PAS.

### F.2 A staged approach to installation

The core text of Clause 4 to Clause 10 is presented in the sequence recommended for their application.

The requirements in 5.1 state that Retrofit Installers are not only to be in possession of a retrofit design compliant with PAS 2035:2023 but also to take some responsibility for ensuring that the retrofit designs they are provided with are complete and appropriate for the buildings in which the EEM are to be installed.

This does not, however, include any requirement or expectation that the Retrofit Installer is responsible for correcting or enhancing the design in the event that it is judged to be inadequate or inappropriate. PAS 2030 is specific in requiring the Retrofit Installer to refer back to the Retrofit Coordinator where any such inadequacy is identified, or where the pre-installation building inspection identifies potential issues in respect of the building designated for installation or with other EEM that have been or are to be installed in the same building.

Subclause 5.2 sets out the principle retrofit design elements that the Retrofit Installer expects to find in the provided design and, as such, whilst providing the detail of what the Retrofit Installer is required to look for and confirm provision of, it also establishes the basis for the Retrofit Installer to refer back to the Retrofit Coordinator where there are concerns about the retrofit design provided.

In setting out requirements against which the Retrofit Installer's processes and procedures are assessed, Clause 6, together with the measure-specific annexes relevant to the measures installed, also provides the Retrofit Installer with a route map to planning and undertaking each installation.

All stages of installation are included from planning (installation method statement, 6.1), through the provision of equipment and tools (6.2), the checking and handling of materials (6.3), and the selection, training, instruction and supervision of operatives (6.4 and 6.5).

This PAS also addresses Retrofit Installer responsibilities when subcontracting all or part of an installation (6.6), and for commissioning and handing over installed EEM (6.8 and 6.9).

Finally, in 6.10 and 6.11, this PAS deals with the requirements for process control, documentation and record keeping that are so important for demonstrating good process management.

Clause 7 enlarges on the theme of installation process management, initially by providing detailed requirements for the undertaking of a pre-installation building inspection (7.2) that is proving to be such a significant element of good EEM installation.

This inspection is the final opportunity, before installation commences, to confirm that the retrofit design is appropriate for the building in which EEM are to be installed and that the Retrofit Installer's plan for installation has been correctly prepared. The inspection takes into account not only the details of the EEM to be installed but also the condition and status of the building (including the presence of protected species) as well as the presence of other measure types that could have implications for, or impact on, the performance or effectiveness of the measure(s) to be installed.

This clause also covers the Retrofit Installer's responsibility to provide for any required intermediate inspections (7.3).

The remainder of Clause 7 sets out a standard procedure for process management (along BS EN ISO 9000 lines) that is intended to ensure that the quality intentions of the installation process are not only delivered but can be audited subsequent to installation. Retrofit Installers might find that close attention to following this procedure can contribute meaningfully to the performance and reputation of their business.

Clause 8 establishes requirements for Retrofit Installers to have and operate a basic procedure for receiving and dealing with client complaints and generally interacting with clients.

Identification of the EEM that the Retrofit Installer is qualified to install, the source of the retrofit design and whether the claim is made on the basis of the Retrofit Installer's own assessment or has been validated by another party, particularly by an independent third-party certification body is reviewed in Clause 9.

Retrofit Installers can claim compliance with this PAS on the basis of their own assessment provided they use the correct form of declaration and are confident that they can demonstrate such compliance through their recorded procedures, installation documentation and installation performance, if required to do so.

It is important to recognize, however, that terms of particular contracts or of some energy efficiency funding schemes can require that compliance with this PAS be validated by an external party and indeed for some schemes (e.g. the UK Government ECO scheme), validation by an accredited certification body is required.

Other party validation is not therefore a requirement of this PAS, but the PAS makes provision for self-assessment, other party validation and independent, third party (certified body) validation. For all of these, use of the correct form of declaration is part of the requirement for compliance with this PAS.

Whether or not external validation is required by scheme requirements or commercial contract, Retrofit Installers should be aware that clients can have greater confidence in work for which the correct undertaking has been validated by another party, particularly if that other party is an organization that has itself been independently accredited as being fit to do so.

## Annex G (informative)

### Example installation project information collation form

#### G.1 Use of this form

*This form is provided to assist Retrofit Installers in meeting the record keeping requirements of this PAS. It is presented in a form that may be copied and used by Retrofit Installers as required.*

#### PAS 2030 Installation Process Record

Unique reference for installation to which this record relates.

*It is recommended that the reference allocated here should be the primary identifier used to collate the set of information required to support each application of PAS 2030, including for the elements of the method statement.*

#### G.2 Location of installation

Record full address of the dwelling in which the specified EEM is/are, to be installed.

#### G.3 Measure(s) to be installed

Identify each measure/measure type, to be installed as part of this project.

\_\_\_\_\_ measure-specific annex \_\_\_\_\_

\_\_\_\_\_ measure-specific annex \_\_\_\_\_

\_\_\_\_\_ measure-specific annex \_\_\_\_\_

\_\_\_\_\_ measure-specific annex \_\_\_\_\_

Confirmation that all required measures are within scope of Retrofit Installer certification \_\_\_\_\_

**G.4 Source of PAS 2035 compliant design (5.1)**

In-organization or independent third party provided.

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If independent third-party record name and contact details.

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Design claimed to comply with PAS 2035.

Document Reference: \_\_\_\_\_

Date liaison with client confirmed: \_\_\_\_\_

**G.5 Validation of design (5.2)**

**G.5.1 Design adequacy (5.2.1)**  
Retrofit Installer assured of validity of PAS 2035 compliance:  
Date: \_\_\_\_\_

Document references: \_\_\_\_\_

**G.5.2 Design scope, adequacy and suitability (5.2.3)**  
Retrofit Installer assured of design content:  
Date: \_\_\_\_\_

Document references: \_\_\_\_\_

**G.5.3 Suitability of specified EEM (5.2.3)**  
Retrofit Installer agrees that installation project specified is in line with Client expectations and is in accordance with information provided.  
Date: \_\_\_\_\_

Document references: \_\_\_\_\_

**G.5.4 Ventilation requirements (5.2.4)**  
Retrofit Installer assured the retrofit design provided includes appropriate and sufficient provision for the maintenance/enhancement of ventilation in the property in which the installation specified is to be undertaken.  
Date: \_\_\_\_\_

Document references: \_\_\_\_\_

**G.5.5 Testing and commissioning (5.2.5)**  
Retrofit Installer confirmation of provision of testing and commissioning requirements:  
Document references: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## G.6 Products and/or system specified/to be installed

|  |
|--|
| <p><b>Product 1:</b></p> <hr/> <p>Available date:</p> <hr/>    |
| <p><b>Product 2:</b></p> <hr/> <p>Available date:</p> <hr/>    |
| <p><b>Product 3:</b></p> <hr/> <p>Available date:</p> <hr/>    |
| <p><b>System:</b></p> <hr/> <hr/> <p>Available date:</p> <hr/> |

## G.7 Installation method statement

The Retrofit Installer is required to possess and make available when required, the information that constitutes the method statement applicable to each EEM installation, before commencement of its installation (6.1). Completion of the following fields could assist the creation of the required record.

### G.7.1 Reference for the retrofit design provided by the Retrofit Coordinator (6.1.1 and G.5)

### G.7.2 Identification of the relevant measure-specific installation Annex(es) from PAS 2030 (6.1.2).

### G.7.3 The method(s) to be used for installing the product, including all constituent tasks (6.1.3, 6.1.4, 6.1.5).

Enter references to all relevant methods

#### G.7.3.1 Requirement for intermediate inspections (6.1.6)

Confirmation that the Retrofit Installer is aware of any requirement for intermediate inspections and that the method statement includes appropriate provision for their undertaking.

Inspection required at (stage)

Anticipated date:

## G.8 Installation process

### G.8.1 Equipment and tools

Identification/availability of the tooling and equipment required for the installation, including any requirement for calibration (6.2).

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### G.8.2 Materials and Supplies

Identification/availability of product related checking, handling and storage instructions (6.3).

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### G.8.3 Operative instructions

Confirmation of provision of installation instructions to operatives (6.4).

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### G.8.4 Operative selection, training, work assignment and briefing

The training and competence required of operatives by the Retrofit Installer to install the measure(s) in compliance with this PAS and its constituent Annexes (6.5). This should cross reference relevant personnel and training records and be reflected in record G.11.

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**G.8.5 Name(s) of operatives undertaking this installation, their vocational competence and project specific briefing**Operative name:  

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Vocational competence and record reference:  

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Briefing given for this installation:  

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Date:  

---

Operative name:  

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Vocational competence and record reference:  

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Briefing given for this installation:  

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Date:  

---

Operative name:  

---

Vocational competence and record reference:  

---

Briefing given for this installation:  

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Date:  

---

Operative name:  

---

Vocational competence and record reference:  

---

Briefing given for this installation:  

---

Date:  

---

Operative name:  

---

Vocational competence and record reference:  

---

Briefing given for this installation:  

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Date:  

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**G.8.6 Installation supervision**

Confirmation that the Retrofit Installer has assessed the vocational competence of operatives assigned to this project and has allocated operatives to provide a vocational competence ratio appropriate to the requirements of the project as well as arranging for appropriate supervision (6.5.3).

Vocational competence confirmed.

Vocational competence ratio confirmed:

Supervisor(s) designated:

**G.8.7 Subcontracting**

Enter the identification of any subcontractors to be engaged for this installation (6.6) together with confirmation that the primary Retrofit Installer’s contract with the subcontractor requires that the subcontractor will comply with all requirements of this PAS that are relevant to the installation related tasks to be undertaken and that sub-contracted operatives have the necessary skills and competence for the installation tasks subcontracted.

**G.8.8 Testing and Commissioning**

Detail of any ‘commissioning’ action required of the Retrofit Installer (6.7 and 6.8).

**G.8.9 Handover**

The information to be delivered to the client at handover (6.9).

Identity of operatives authorized to undertake handover (6.9.2).

**G.8.10 Installation control**

This will be the identification of the competent person authorized by the Retrofit Installer to sign off the satisfactory completion of the installation (6.10).

Retrofit Installer signature:

Date:



## G.9 Operation and process oversight

Confirmation that the Retrofit Installer has in place, and operates, procedures designed to ensure that pre installation building inspection and installation processes in relation to the installation the EEM measures undertaken in this project (7.1), are undertaken and completed in accordance with the retrofit design, to the satisfaction of the client(s) and in accordance with the requirements of this PAS, particularly in respect of:

The measures installed:

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The use of specified installation methods:

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Any required ventilation upgrade including where necessary the procurement and installation of any required ventilation upgrade from a ventilation specialist:

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Avoidance of thermal bridging:

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Testing:

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Commissioning:

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Handover:

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## G.10 Pre-installation building inspection

### G.10.1 inspection findings

Date of notification to relevant certification body (7.2.2).

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Record report reference and brief description of any issues raised, including in relation to:

- The suitability and completeness of the design specification (7.2.3);
  - The suitability and completeness of the installation method statement (7.2.4);
  - Confirmation that the specified EEM can be safely and effectively installed at the designated location and is in accordance with the client's expectations (7.2.5);
  - Potential for moisture build-up as a result of the installation;
  - Confirmation of the adequacy of ventilation prior to installation;
  - Potential instances of thermal bridging and planned actions for amelioration;
  - Risk to functionality and/or safety of installed services (7.2.6);
  - The presence of protected species (7.2.7);
  - Other issues recorded:
- 

Date report issued to Client:

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### G.11 Provision for any intermediate inspection required (7.3)

Confirmation that where an intermediate inspection is required, adequate provision has been made for its undertaking and that any issues arising from that inspection have been communicated to the client for resolution.

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Date of any communication with client:

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### G.12 Installation change (7.4)

Retrofit Installer confirmation that any proposed changes to the retrofit design or method statement (including the substitution of alternative materials, products, construction details or processes) have been submitted to/ approved by, the Retrofit Coordinator prior to installation (7.4.1).

Retrofit Installer confirmation that any change approved has been checked for compatibility with the installation of other measures being installed at the same site (7.4.2).

Retrofit Installer confirmation that project related feedback from the Retrofit Coordinator, inspectors' operatives or assessment bodies has been documented, reviewed and actioned where appropriate (7.4.3).

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### G.13 Process continuity (7.5)

Identification of alternative installation resource for use should the Retrofit Installer be unable to complete the installation.

Approval received from Retrofit Coordinator:

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### G.14 Process control records (7.6 & 7.8)

References for the installation process control records relevant to this project:

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### G.15 Details of any problems encountered during installation, corrections agreed and remedial work undertaken

Please provide a brief record of the nature and extent of the problem(s), the date of reporting to the client and the method and timing of its resolution. This record should include reference to any tools or equipment requiring recalibration. Include references to any relevant documentation held separately.

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Date or reporting to Retrofit Coordinator:

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### G.16 Client complaints (8)

Date complaint received:

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Date acknowledged to customer:

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Date complaint reported to Retrofit Coordinator:

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Date certification body informed (when requested):

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**Nature of complaint**  
*(e.g. complaint related to: installation, Retrofit Installer attitude, operative behaviour, measure efficiency, measure suitability, timing, delay).*

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**Complaint resolution**  
*(Where complaint to be corrected or resolved by Retrofit Installer, record action taken and date of resolution.)*

Action taken:

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Date of resolution:

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### G.17 Commissioning – EEM performance testing carried out

|  |
|--|
| Record date of commissioning, tests undertaken and any adjustments made. |
| Date of commissioning:   |
| _____  |
| Retrofit Coordinator informed:   |
| _____  |
| Tests and adjustments:   |
| _____  |
| _____  |
| _____  |
| _____  |

### G.18 Record of information left with client at handover

|  |
|--|
| Record identity of client actually receiving information, items of information left, any physical demonstration provided and date of handover. |
| Customer name:   |
| _____  |
| Information provided:  |
| _____  |
| _____  |
| _____  |
| _____  |
| Date of handover:  |
| _____  |
| _____  |

### G.19 Installation sign-off

The following statement is to be signed off by a competent person authorized to do so on behalf of the Retrofit Installer.

**The installation identified in this process record has been undertaken in accordance with PAS 2030 and is confirmed as meeting the relevant design specification.**

|                                      |
|--------------------------------------|
| <b>Name of authorized signatory:</b> |
| _____                                |
| <b>Signature:</b>                    |
| _____                                |
| <b>Date:</b>                         |
| _____                                |
| _____                                |

## Bibliography

### Standards publications

For dated references, only the edition cited applies.  
For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 7913, *Guide to the conservation of historic buildings*

BS 40101, *Building performance evaluation of occupied and operational buildings (using data gathered from tests, measurements, observation and user experience) – Specification*

BS EN ISO/IEC 17024, *Conformity assessment – General requirements for bodies operating certification of persons*

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