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# TrustMark registration and PAS 2030 – What this means for the insulation sector in Scotland

Green Heat Installer  
Engagement Programme

26 October 2023



# Presenters

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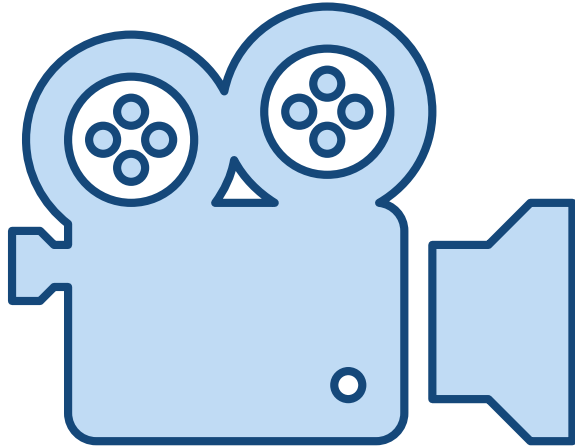
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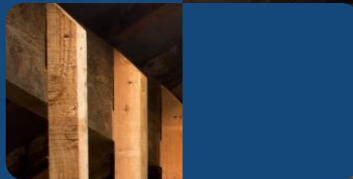
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Please complete this if you can so we can continue to improve the webinars we offer.

# Thermal insulation sector – challenges and opportunities



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# Green Heat Installer Engagement Programme



## Resources hub

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



## Skills, funding and certification

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



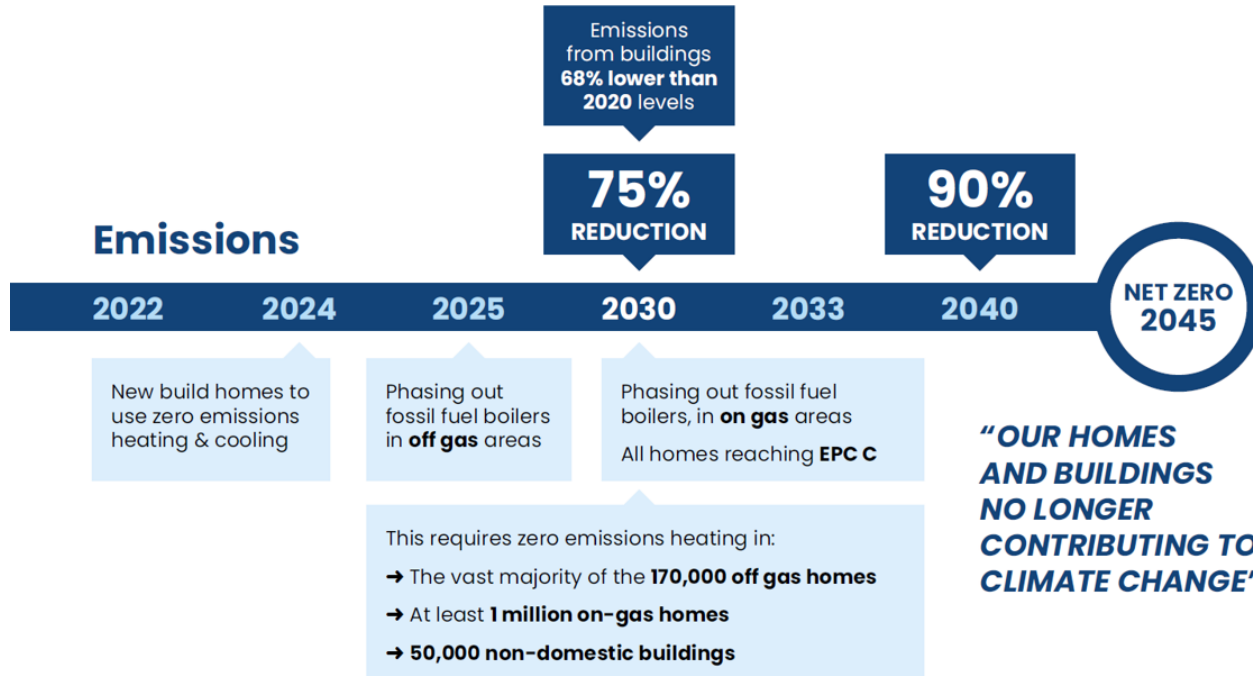
## Green heat installer events

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



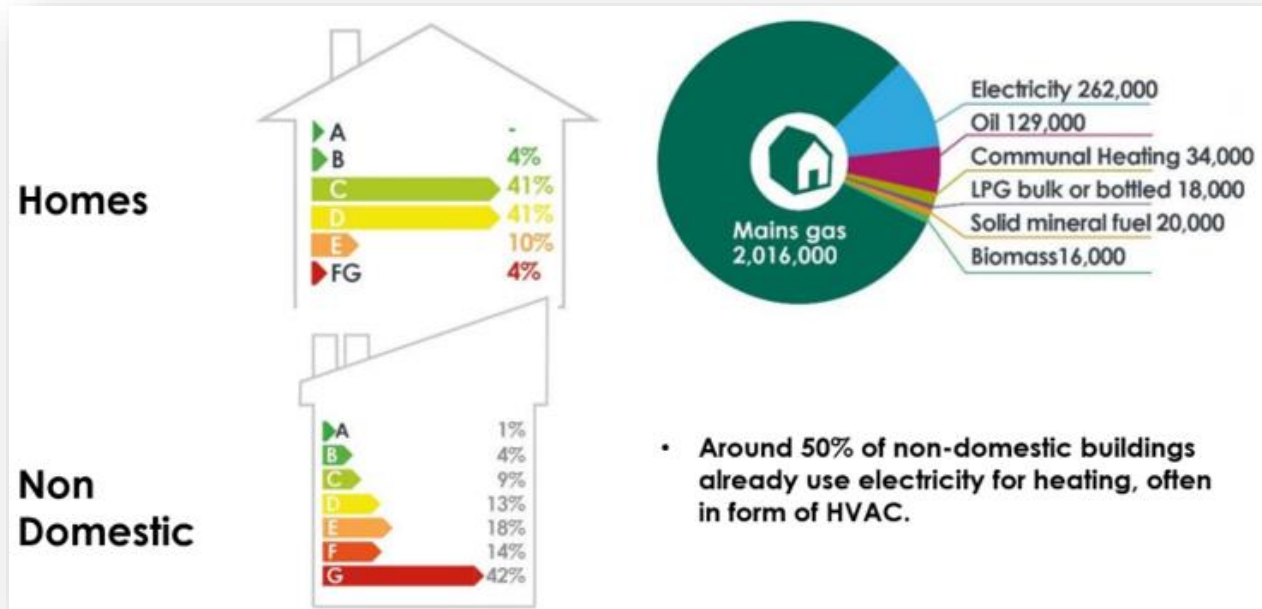
## Funding for your customers

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



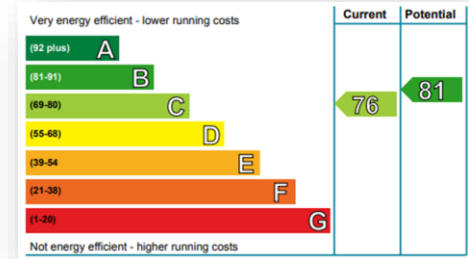


# Where are we now



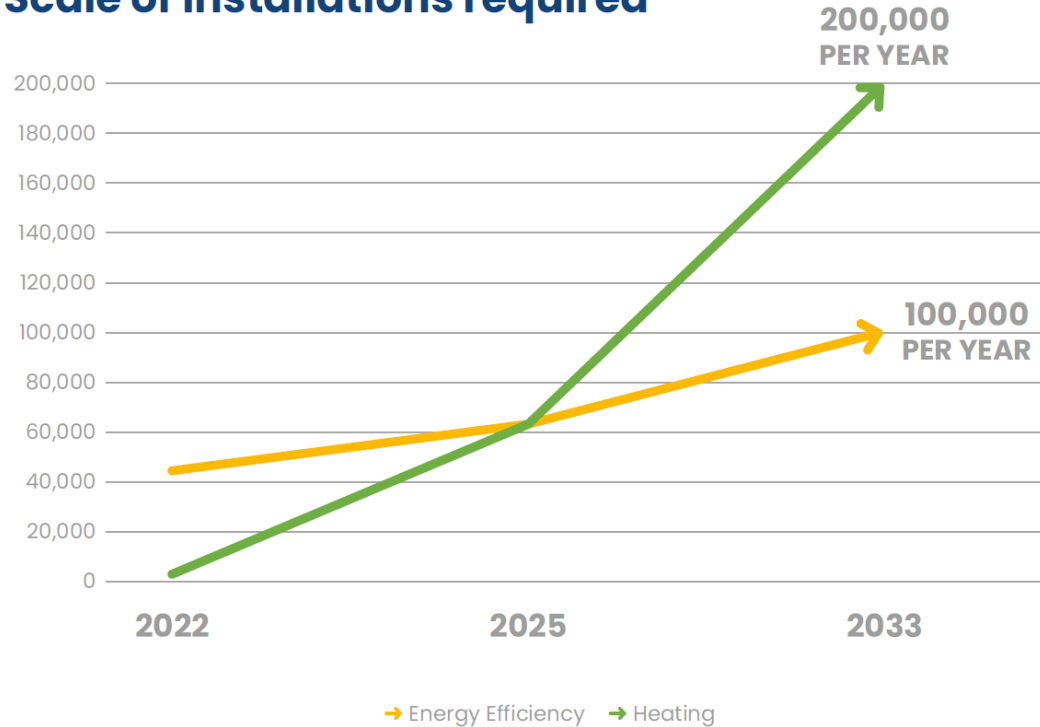
# Where do we need to be

- By 2025 –all private rented homes achieving EPC C.
- By 2030 –large majority of homes achieving EPC C.
- By 2030 –all homes with fuel poverty households archiving EPC C (EPC B by 2040).
- By 2033 –all homes achieving at least EPC C.
- By 2032 –social rented homes achieving EPC B.



# Domestic energy efficiency installations

## Scale of installations required



# How do we get there

- **Hundreds of retrofit installers in Scotland**
- **Consistently high quality work**
- **Energy retrofit embedded into the everyday practices of builders working in the repair, maintenance and improvement market**
- **Support installers by providing clarity on qualifications, certifications and funding for upskilling**



# Resource to support the sector

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## Energy Saving Trust toolkits



### Insulation toolkit

Find out everything you need to know about becoming an insulation installer in Scotland.

[Explore >](#)



### Heat pump installers toolkit

Find out everything you need to know about becoming a heat pump installer in Scotland.

[Explore >](#)

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# Insulation toolkit

## Insulation toolkit

### Contents

#### 1 Why do homes and commercial buildings need insulation?

- 1.1 Heat loss
- 1.2 Typical insulation measures
- 1.3 Policy landscape
- 1.4 The business opportunity
- 1.5 Frequently asked questions

#### 2 Installation

- 2.1 Product standards and selection
- 2.2 Installation standards
- 2.3 Pre-installation inspections
- 2.4 Other considerations
- 2.5 Further information

#### 3 Qualifications and upskilling

- 3.1 Typical roles
- 3.2 Training providers

#### 4 Installation certifications

- 4.1 Requirements for TrustMark registration
- 4.2 Achieving and maintaining TrustMark registration
- 4.3 Consumer protection
- 4.4 TrustMark registration checklist

#### 5 Wider business considerations

- 5.1 Potential sector risks
- 5.2 Opportunities

#### 6 Government-funded schemes and ECO4

#### 7 Further resources

insulation toolkit / 1. Why do homes and commercial buildings need insulation?  
/ 1.4. The business opportunity

## 1.4. The business opportunity

Why consider insulation work?

[Copy page link](#)

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

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

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

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

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

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

- 55% of homes in the private sector have wall insulation compared to 70% in the social sector.
- 63% of lofts are insulated in the private sector to 200mm or more compared to 7% in the social sector.

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

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

# Funding in Scotland for the retrofit market

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



# Home Energy Scotland Grant and Loan schemes- applicants must use a supplier TrustMark approved.

Primary improvement	Maximum cashback	Maximum loan	Total funding available
External and internal wall insulation	£7,500	£2,500	£10,000
Room-in-roof or flat roof insulation	£3,000	£1,000	£4,000
Loft, cavity wall and floor insulation	£1,500	£500	£2,000

For all eligible energy efficiency measures the maximum grant is 75% of the cost of the measure or the maximum funding limit – whichever is the lowest – up to a combined maximum of £7,500 or £9,000 if the household qualifies for the rural uplift. The rural uplift is additional funding for those in eligible rural and island postcodes. An optional interest-free loan may be taken to cover the remainder of the cost up to the maximum amount per measure.

# Funding for energy efficiency – SME loan scheme

<b>Energy efficiency</b>	<b>Heating, ventilation, insulation, draughtproofing, double glazing</b>
<b>Interest rate</b>	0%
<b>Cashback grant</b>	75%
<b>Maximum cashback</b>	£20,000
<b>Loan value</b>	Up to £100,000 (with 8 year repayment)

# Private Rented Sector Landlord loan

## Energy efficiency and other improvements

**Loan value (0% interest)** Up to £100,000 (£35,00 per property)

Available to landlords registered in Scotland with 5 or fewer properties

**Loan value (3.5% interest)** More than 5 properties can borrow up to £250k

# Green Heat Installer Engagement Programme – useful links



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



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



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



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

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Thank you



# TrustMark

Marc Stevens  
Paul Phillips

What is TrustMark?  
PAS:2030  
How to join



**TRUSTMARK**  
Government Endorsed Quality

# TrustMark is the **quality scheme** for improvements in and around the home



**37**

**Scheme providers**

covering **114** home improvement types



**15,000**

**Businesses**

registered with TrustMark



**51,000+**

**Tradespeople**

working through TrustMark businesses  
(est. Using CITB data)

TrustMark is a '**not for profit**', Social Enterprise and delivers the need for an all-encompassing mark of quality that consumers can recognise and trust.



# What trades does TrustMark cover?

**Builders**



**Electricians**



**Plumbers**



**Plasterers**



**Roofers**



**Insulation measures**



**Bedroom specialists**



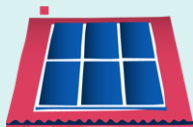
**Bathroom specialists**



**Tree surgeons and consultants**



**Solar panels and wind turbines**



**External Offices**



**CCTV installation**



**Heating Installers**



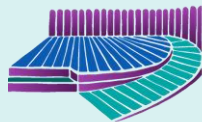
**Window installers and glaziers**



**Tilers - floors and walls**



**Drive and patio contractors**



**Domestic energy assessment**



**Painters and decorators**



**Garden landscapers**



**Drainage engineers**



**EV chargers**



# TrustMark: How it works

## Department for Business and Trade

- Master Licence Agreement

## TrustMark

- Sub-licence agreements and Framework Operating Requirements
- Audit and compliance requirements

## Scheme Provider

- Sub-licence agreement and Code of Conduct
- Inspection and audit of licensed businesses
- Delivery of Technical Standards

## Licensed Business

- Customer Charter

## Consumer / Customer

- Protected

**A Licence** process / sub-licence that extends from government through to the business.

**Framework** - the engine of the quality mark that determines how the Scheme Providers register the businesses.

**Code of Conduct** - sets out the expectations and requirements between the business and the Scheme Provider, the consumer and the legislation applicable.

**Customer Charter** - what the customer should expect when engaging with the business.

**Technical Standards** that are applicable to that sector delivered by the Scheme Providers.

# The Structure of TrustMark

- The Scheme Provider must ensure the registered Businesses meets the requirements of the TrustMark Framework Requirement (FOR)
- Businesses register with a Scheme provider, the business can then register with TrustMark
- Approved Scheme Providers are responsible for ensuring the technical competence of the Registered Business and or the individual.
- The Scheme Provider must ensure the registered Businesses or individuals meet the requirements of the FOR
- The FOR has been agreed upon and constructed with the Government.

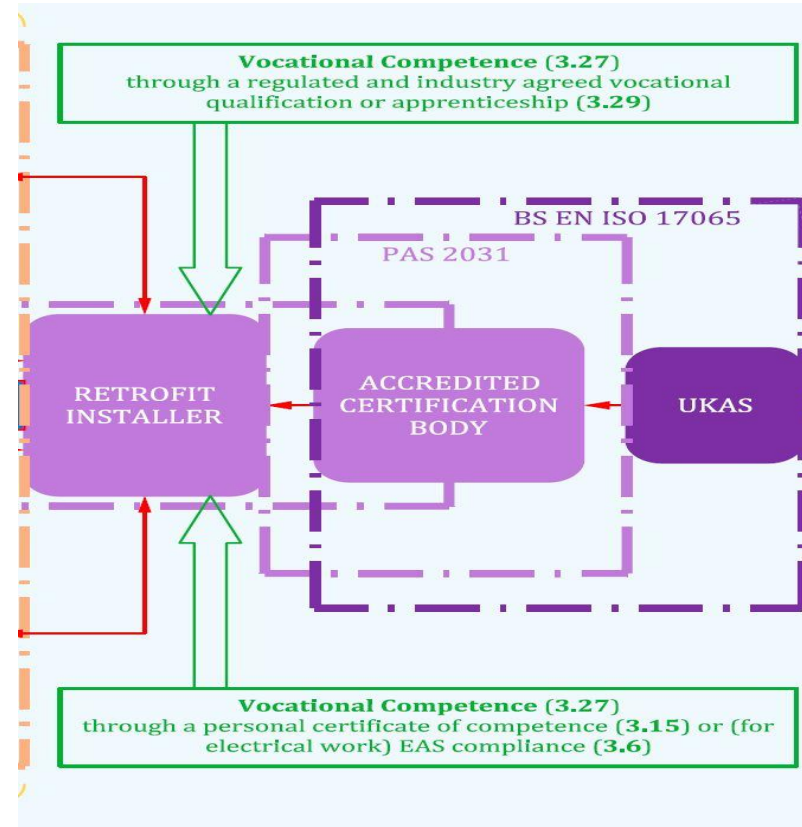
# Registering with TrustMark – PAS:2030

- PAS:2030 (Publicly Available Specification) provides a specification for the installation of energy efficiency measures (EEM) in existing dwellings
- The current version of PAS:2030 is 2019- the new version 2023 was released in September and is free on the BSI Website
  - <https://www.bsigroup.com/en-GB/standards/pas-2035-2030/>
- Process for gaining PAS certification is through a UKAS Certification Body
- TrustMark registration is gained via a PAS:2030 TrustMark Scheme Provider
- Measures requiring PAS:2030 Certification in Scotland are
  - Solid Wall Insulation
  - Underfloor Insulation
  - Room in Roof Insulation
  - Flat Roof Insulation



# PAS:2030 Process

- PAS:2031 - UKAS Accredited Certification Body
- PAS:2030 Certification Body Audited by UKAS
- Certification Body - Retrofit Installer
- Next steps to support certification





# PAS:2030 Certification Checklist

- ✓ Quality Management System
- ✓ Contracts and Resources
- ✓ Training and Competency
- ✓ Continual improvement
- ✓ Record Keeping / Document Storage / Equipment Records
- ✓ Health and Safety
- ✓ Complaints / Customer Service / Customer Handover
- ✓ Audit and Surveillance

# Quality Management System

- ✓ A Quality Management System (QMS) is a collection of business processes focused on consistent delivery of requirements that meet customer needs and enhance their satisfaction
- ✓ You must operate a QMS to ensure every installation meets PAS 2030 requirements
- ✓ A QMS can be on paper or electronic
- ✓ To help you in your application, we have included QMS templates on our Documents page



# Training and Competency

- ✓ From January 2021, as part of PAS 2030 certification, you must hold your sector relevant S/NVQ, or be enrolled to achieve it
- ✓ Each Energy Efficiency Measure (EEM) should be designed, installed and inspected by competent and qualified people relating to each measure
- ✓ All your installers should hold a regulated and industry agreed vocational qualification, apprenticeship or personal certificate of competence relevant to the EEM to be installed, and be able to provide evidence of the qualification
- ✓ All of the above should include an assessment of the ability to deliver required outcomes through the practical application of knowledge and skills in the workplace

# Training and Competency - Measures

As part of PAS:2030 certification you will need to be able to provide details of previous measures you've installed, including:

- ✓ Pre-building installation survey
- ✓ EEM assessment
- ✓ Quotation and contracts
- ✓ Materials used
- ✓ Employee competency details
- ✓ Handover process

# Complaints and Engagement Procedure

As part of your PAS:2030 certification, you must have a procedure to support your employees on how to respond to customers, especially in the following circumstances:

- ✓ You must have a documented complaints procedure
- ✓ Records should be made available to your PAS:2030 certification body when requested
- ✓ Vulnerable occupants (elderly, disabled, children)
- ✓ Pre-noted customer requirements such as timing of work and access
- ✓ Agreed customer requirements
- ✓ Customer requests for additional measure-related work, extending beyond the installation process
- ✓ Customer complaints or feedback about the installation or installation process
- ✓ TrustMark can support you with a complaint register template which you can find within the QMS templates in the resources and downloads area of this hub

# Customer Handover Procedure

Your handover to the customer should include:

- ✓ A physical inspection of the installed energy efficient measures (EEM)
- ✓ An explanation of its function and operation
- ✓ A demonstration of how to operate controls and devices, where applicable
- ✓ User guides, manuals and maintenance instructions
- ✓ Guarantee certificates and sign-off documents - with copies kept as part of your record keeping

# Audit and Surveillance

- ✓ A PAS 2030 audit team will carry out an on-site assessment for each type of measure you are applying for under your PAS 2030 certification
- ✓ They will then carry out at least one audit for each measure undertaken, per year
- ✓ Assessments may include an on-site inspection of all PAS measures or similar work you have applied for before certification can be awarded

The evidence you may be asked to provide could cover:

- ✓ Documentation to show previously completed measures
- ✓ Supplier and material records, customer reviews or feedback, training and development plans
- ✓ Health & safety records, continual improvement plans
- ✓ Details of current or past contracts for all installations between you, as the installer, and the customer

# PAS:2030 2019 - PAS:2030 2023 Transition

- A new standard for PAS:2030 released 1<sup>st</sup> September 2023
- 18-month transition date to 30<sup>th</sup> March 2025
- Transition plan underway with Department Energy Security and Net Zero (DESNZ), UKAS, TrustMark
- Changes to independent surveillance assessment - more measures
- Retrofit technical guides included as references
- <https://www.bsigroup.com/en-GB/standards/pas-2035-2030/>

# TrustMark Registration

- ✓ The primary aim of TrustMark is to drive up standards across all sectors of home improvements and ensure high levels of consumer protection are maintained
- ✓ Once registered, you will be added to a directory of certified installers, where homeowners can contact you to get a quote
- ✓ Only TrustMark Registered Businesses can carry out work for such initiatives, to provide quality assurance to householders that the work will be completed to the accepted standards

# How to join TrustMark



**Visit the TrustMark website to fill in the sign-up form**

[www.trustmark.org.uk/business/information-guidance/join-trustmark](http://www.trustmark.org.uk/business/information-guidance/join-trustmark)



**Choose the Scheme Provider to support your application**



**Submit your application and wait for approval**



Thank you



**TRUSTMARK**  
Government Endorsed Quality



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

Panellists:

Pilar Rodriguez	Green Heat Installer Engagement Programme Manager, Energy Saving Trust
Marc Stevens	Head of Compliance, TrustMark
Paul Phillips	Assurance Director, TrustMark



# energy saving trust

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

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Thank you for  
attending