

energy  
saving  
trust

# PAS2030 and TrustMark registration – why and how to get your business there

Green Heat Installer  
Engagement Programme

14 Feb 2024



# Presenters

Pilar Rodriguez	Green Heat Installer Engagement Programme Manager, <b>Energy Saving Trust</b>	Presenter, Q&A Panel
Marc Stevens	Head of Energy Engagement, <b>TrustMark</b>	Presenter, Q&A Panel
Alex Gates	Managing Director, <b>Simply Certification</b>	Presenter, Q&A Panel

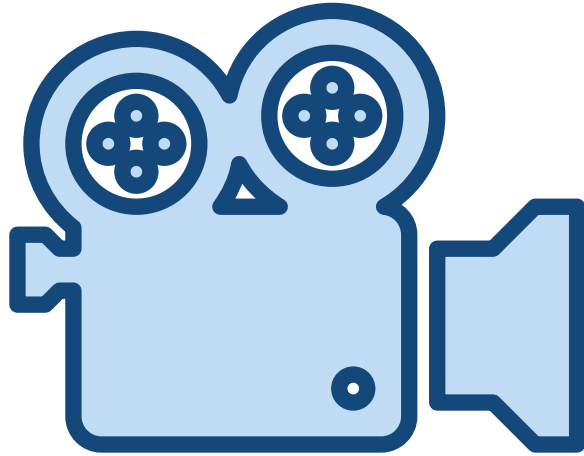
# Questions

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You can send in your questions at any time during the presentation. These will be collected and addressed during the Q&A session at the end of the presentations.



# Recording



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

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

# Have Your Say



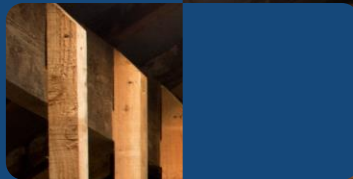
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Please complete this if you can so we can continue to improve the webinars we offer.

# Thermal insulation sector – challenges and opportunities

Pilar Rodriguez

07 02 24



# Green Heat Installer Engagement Programme



## Resources hub

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



## Green heat installer events

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



## Skills, funding and certification

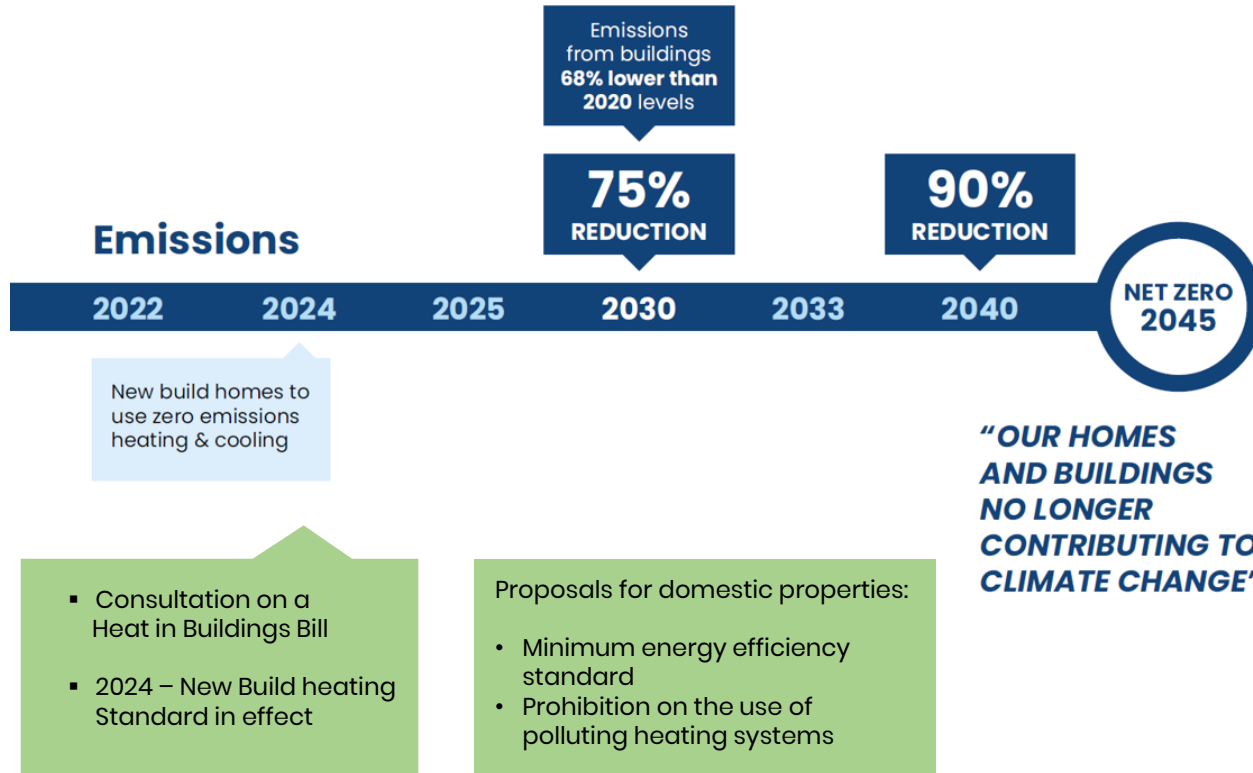
Discover the certification requirements as an installer or assessor looking to carry out work under various schemes.



## Funding for your customers

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







# Heat in Buildings Bill Consultation

## Domestic properties:

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

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

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



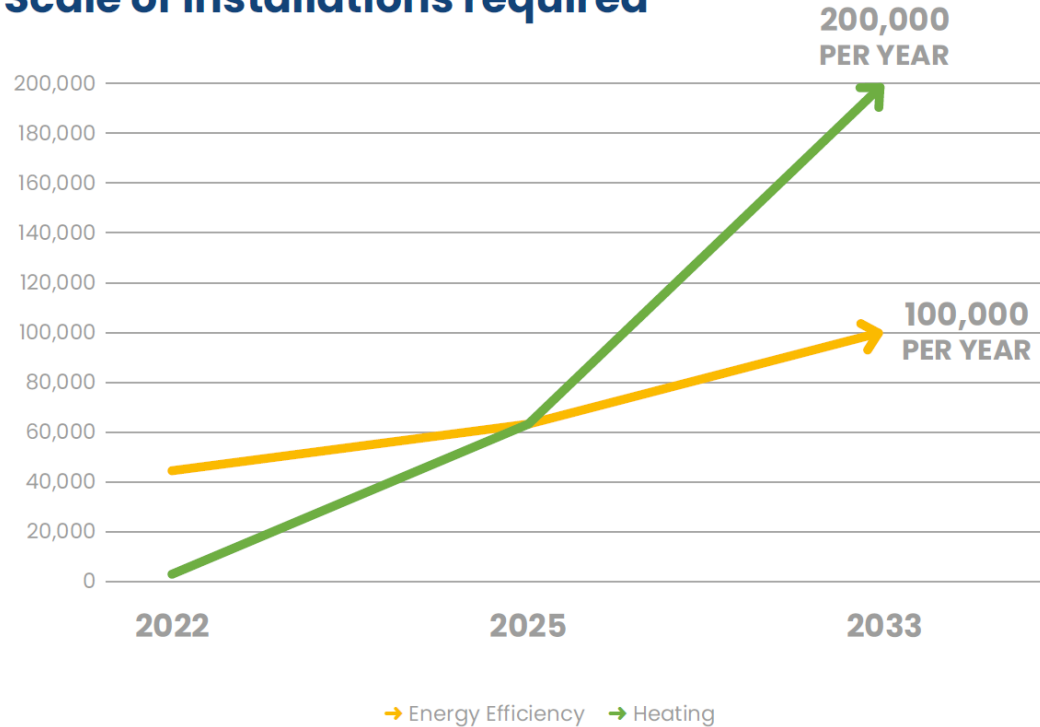
# Heat in Buildings Standard for energy efficiency

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



# Domestic energy efficiency installations

## Scale of installations required



# Funding in Scotland for the retrofit market

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

# Green Heat Installer support – Insulation toolkit

## Insulation toolkit

### Contents

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

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

## 1.4. The business opportunity

Why consider insulation work?

[Copy page link](#)

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

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

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

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

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

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

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

[greenheattoolkit.energysavingtrust.org.uk/t/insulation-toolkit](https://greenheattoolkit.energysavingtrust.org.uk/t/insulation-toolkit)

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

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

# Heat in Buildings Bill Consultation

## Online events:

- 25 February, 14:00 – 15:05 – online (open session for those within one of the 11 areas of Scotland identified)
- 29 February, 18:00 – 19:05 – online (open session for those within one of the 11 areas of Scotland identified)
- 5 March, 11:00 – 12:05 – online (for Orkney and Shetland residents, or anyone within the local areas of Scotland identified above, who meet the criteria below)

Registration for all events is open on [Eventbrite](#).

## Further information:

- For further information you can contact:

[HiBConsultation@gov.scot](mailto:HiBConsultation@gov.scot)

- Have your say:

<https://consult.gov.scot/energy-and-climate-change-directorate/proposals-for-a-heat-in-buildings-bill>

- See the full document:

<https://www.gov.scot/publications/delivering-net-zero-scotlands-buildings-consultation-proposals-heat-buildings-bill/>

# Green Heat Installer Engagement Programme – useful links



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



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



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



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



**energy**  
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Thank you



# TrustMark

Marc Stevens



**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**



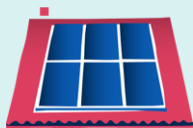
**Bathroom specialists**



**Tree surgeons and consultants**



**Solar panels and wind turbines**



**External Offices**



**CCTV installation**



**Heating Installers**



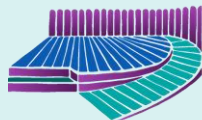
**Window installers and glaziers**



**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





# Benefits



# 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**

# Handover to Alex Gates



**TRUSTMARK**  
Government Endorsed Quality



Alexandra Gates  
Simply Certification, Managing Director



21611



**TRUSTMARK**  
Government Endorsed Quality

# Who is Simply Certification?



We provide a supportive certification service



Simply Certification operate under UKAS and TrustMark schemes



Robust assessments will ensure your business is protected

# Our role



- Provide impartial assessments and certification against a range of standards and schemes:
  - ISO 9001 (Quality)
  - ISO 14001 (Environment)
  - ISO 45001 (Health and Safety)
  - PAS 2030 (Energy Efficiency Installation)
  - PAS 2038 (Energy Efficiency Installation – Commercial)
  - Flexi-Orb (Installation of Solar PV, EES and EVCP)
  - MCS (Microgeneration Certification Scheme)
  - TrustMark

There is an estimated

**£300bn**

that you can  
tap into



- Social Housing  
Decarbonisation Funding
  - Vinci Supply Chain
- Green Rewards
- Energy Company Obligation (ECO4)
- Great British Insulation Scheme
- Home Upgrade Scheme
- Local Authority Delivery



# Common concerns around PAS 2030



## “It’s too complicated”

- It’s not as difficult as you may think!
- Awareness training is available and goes through the full standard in your own time

## “I don’t know where to start”

- There is help here to support you through the process
- Network of support to guide you through
- Systems readily available to use

## “It’s too expensive and another compliance and certification outgoing”

- Initial outgoing prices start from £1400 for certification, possible additional costs for support
- Payback is usually within one to two installations
- Ongoing costs are in line with the number of installs you carry out

## “Why would I bother, my order book is full this next 12 months”

- As net zero deadline approaches industry is moving to increasing the need of retrofit standards
- Important to future proof your business in the repair and maintenance sector
- Commercial opportunities are growing for PAS 2030/MCS installers under PAS 2038 specification

How do you get there?





**TRUSTMARK**  
Government Endorsed Quality

# PAS 2030 and TrustMark



## GETTING ASSESSMENT READY

- Insurances
  - Public Liability
  - Professional Indemnity
  - Insurance Backed Guarantees
- Quality Management System
- Competency (Qualifications)

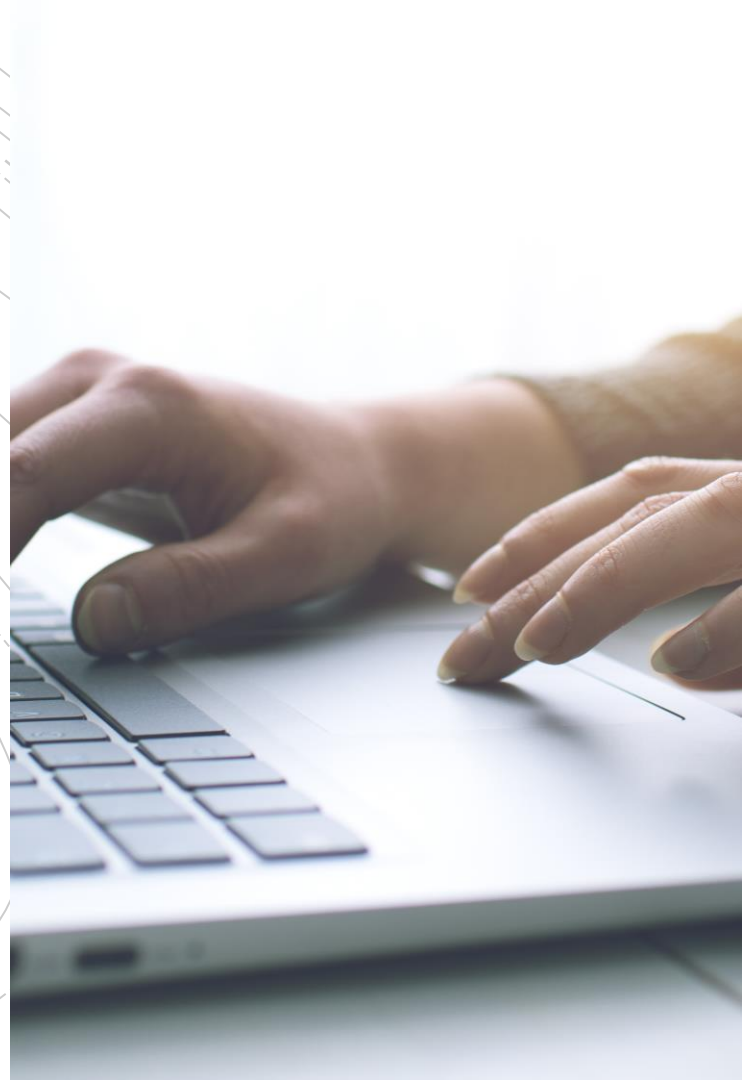
## THE ASSESSMENT AND CERTIFICATION PROCESS

- Application
- Head office assessment
- Technical inspections



# GETTING ASSESSMENT READY

Full checklist is available



# Insurance

## Company Insurance

- Public Liability
- Employers Liability
- Professional Indemnity

## Subcontractors Insurance

## Insurance backed guarantee

- Providers on TrustMark website

# Quality Management System (QMS)



In line with PAS 2030:2019

A management system is a collection of business processes focused on meeting a standard, in this case PAS 2030:2019

The format and how it is hosted is up to you, e.g. it can be on a platform, within Dropbox/Google Drive

If you need help we can point you in the right direction



# Competency



A qualified Retrofit Coordinator

Installation team  
(Employed and Subcontracted)

In the case of being  
in a supply chain the  
RC is usually an  
external role

Relevant recognised  
qualifications in line  
with the measures



Relevant Installer  
Competency

## Insulation Measures

- SVQ/NVQs

## Electrical Measures

- 18<sup>th</sup> Edition

## Gas Measures

- Gas Safe Carded



THE ASSESSMENT AND  
CERTIFICATION PROCESS



## Application

- An application will gather all the relevant details of your organisation
  - Registered company details
  - Current certification
  - Subcontractors/Employees
  - Assessment readiness

Access

<https://simplycertification.co.uk/pas-2030-application-form/>



### PAS 2030, MCS and TrustMark Application Form

Please complete this form as accurately as possible. You have the option to save your progress and return later by clicking "Save" in the bottom right. All information that you input below will be shown on any relevant paperwork, websites and systems such as your certificate and the TrustMark website.

① ②

#### Your Company Information:

Company Registration Number (as stated on Companies House)

Full Company Name (including legal statuses as on Companies House, e.g. Ltd) \*

Full Company Address (as registered with Companies House) \*



## Head office assessment

At least one day

Paperwork assessment

Teams/Onsite

Identify that the organisation:

- Meets the requirements of PAS 2030 through the Quality Management System
- Has the relevant skills/knowledge to meet the standard

# Technical Inspections



One full technical inspection  
against each measure

Need to be carried out  
within 3 months of the head  
office assessment

“Capability and competence  
assessment” may be used if  
you are not currently  
installing to the measure  
under PAS 2030 that you are  
applying for

Most measures under PAS  
2030 need to be assessed  
PRE, MID and POST

Paperwork for the  
inspection should be  
submitted at least 48 hours  
prior to the inspection



## Certification

A 12 month certification will be issued

If TrustMark was included, TrustMark Certification is also issued

Your organisation will be added to

- GreenDeal Orb
- TrustMark



# Surveillance



As part of your certification agreement, you will have agreed to undertake regular surveillance to maintain certification

1-10% of your installations will be inspected during the next 12 months

You are required to submit your installation updates at the end of each week

Once you hit a threshold of needing 3 surveillance inspections (pre, mid or post) arrangements must be made to carry out the assessments



## Benefits to PAS 2030

Qualify to deliver under various schemes

Future proofs your business

Instills trust and confidence

Opens up more opportunities

Access a growing market

# Where to start



- GAP Analysis
  - <https://brightercompliance.co.uk/pas2030-gapanalysis/>
- Application
  - <https://simplycertification.co.uk/pas-2030-application-form/>



**simply**  
certification



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 Energy Engagement, <b>TrustMark</b>
Alex Gates	Managing Director, <b>Simply Certification</b>



# 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