

PAS 2030:2023

Incorporating Corrigendum No. 1

Installation of energy efficiency measures in existing dwellings – Specification



Department for
Energy Security
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Foreword

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PAS 2030:2023 supersedes PAS 2030:2019+A1:2022 which remains current and will be withdrawn on 30 March 2025.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

Text introduced or altered by Corrigendum No. 1 is indicated in the text by tags C1 C1. Minor editorial corrections are not tagged.

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, 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.

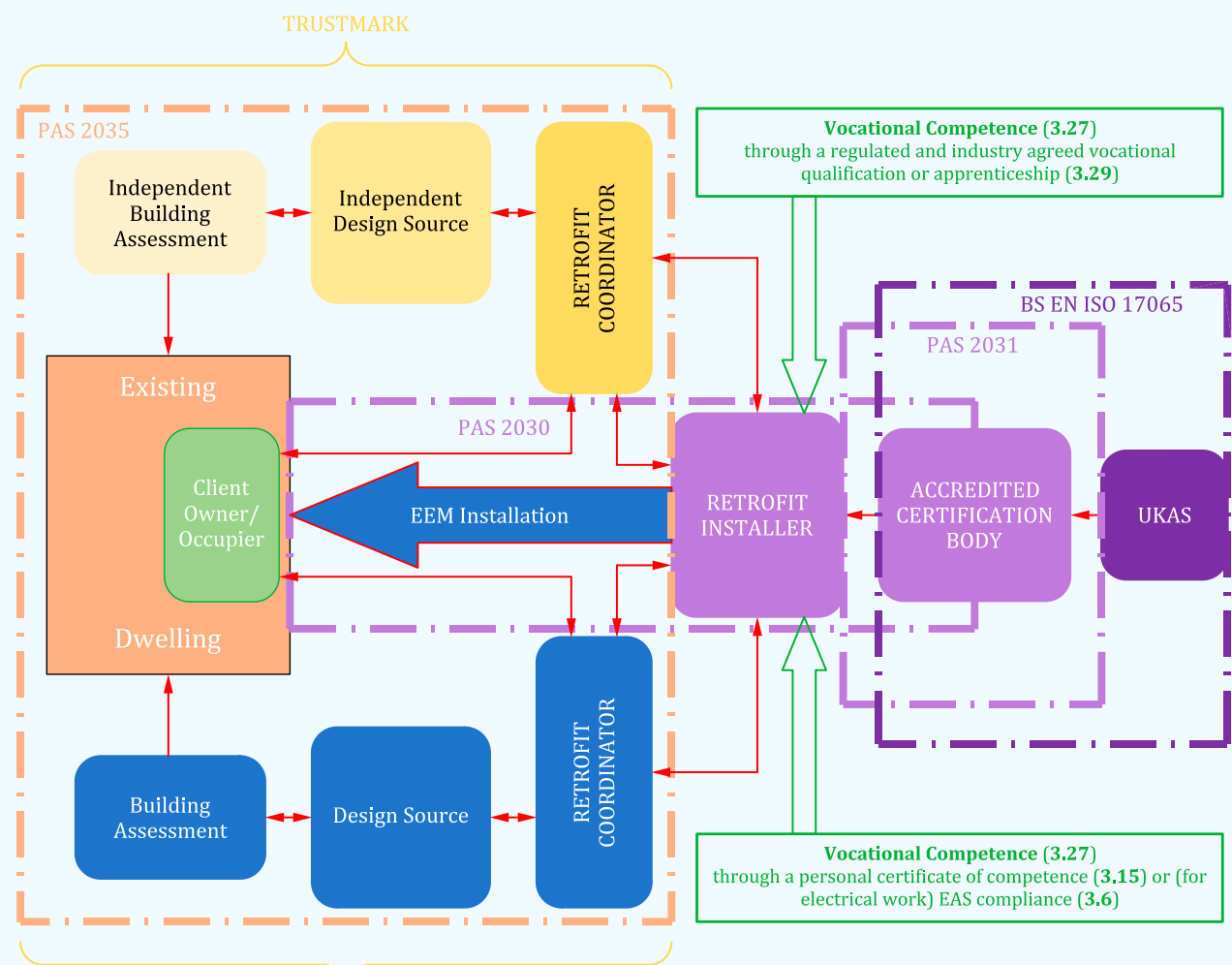
Attention is drawn to the fact that this PAS does not set out a specification for the design of EEM or for the assessment of dwellings undertaken to inform such designs – those topics are covered by PAS 2035. It does, however, set out critical aspects of retrofit design that Retrofit Installers expect 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 document¹⁾. 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*

¹⁾ 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*.²⁾

[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 2022.³⁾

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

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

³⁾ Available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1045178/retrofit-room-in-roof-insulation-best-practice.pdf

⁴⁾ 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:

- 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);
- verify the engagement of a sufficient number of vocationally competent operatives as specified in the relevant measure-specific annex;
- 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;
- verify that all operatives have access to any training required to maintain their skills and knowledge, including any relevant system-specific training;
- 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;
- 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;
- 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 constructed⁵⁾, 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.

⁵⁾ 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/)

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)

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/)

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)

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 2022⁶⁾. [N5]

⁶⁾ Available at 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
Solar blind, shutters and shading devices (internal and external)	1. Mechanically operated devices	BFM.11.1	B.11
	2. Electrically operated devices	BFM.11.2	
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

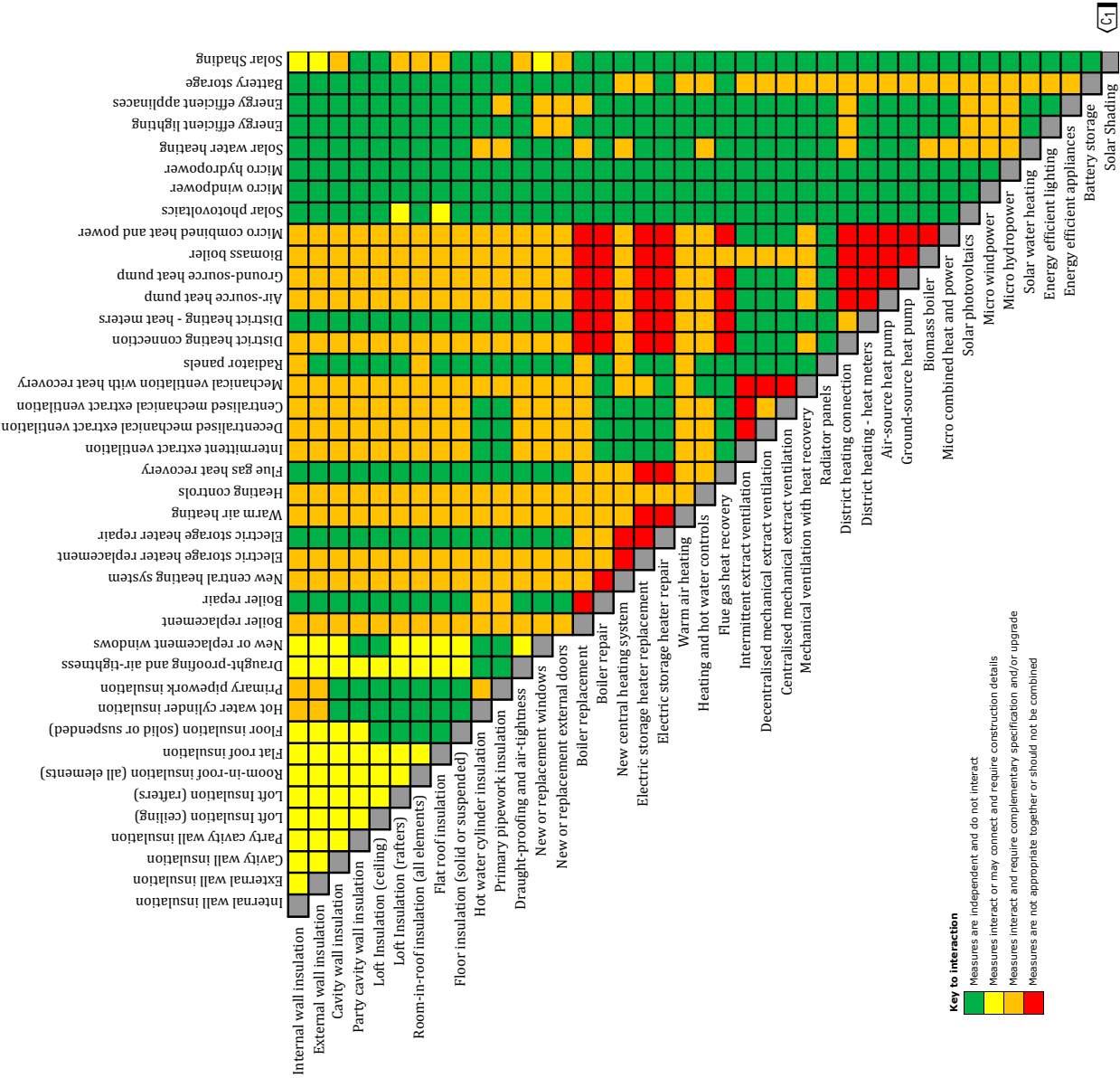
When EEMs are installed in any existing dwelling it is essential to take account of the fact that some measures can impact upon the performance of other measures or can themselves be impacted by those measures. There are also EEM that when installed in a dwelling without the correct level of care can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



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_{Rsi}) 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.1, 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)
B1-11 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)	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, incorporating: • identification of essential ventilation openings that require sleeving or safeguarding before installation; • the position of all flues whether or not they are in service and measures that shall be taken to safeguard their proper functioning; and • 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. NOTE 1 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.

Table B.1 – (continued)

	NOTE 2 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]. NOTE 3 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]).
B1-12 Pre-installation building inspection requirements	1) As a minimum the Retrofit Installer shall: - investigate and determine if the CWI installation work: - results in non-compliance with the Building Regulations, e.g. in relation to workmanship; materials; structural stability; fire safety; resistance to moisture; - results in unsafe operation of a combustion appliances; - compromises the functionality of existing ventilation ducts/systems; and - compromise the functionality and/or safety of existing services (gas, electric, water, telephone, etc.); identify: - if the proposed installation would be non-compliant with any requirements stated by the supplier; - if the type and condition of the dwelling structure is suitable for the works to commence; - the extent of the cavity to be filled; - if the site layout or conditions will impair the execution of the works; and - if relevant checks have been undertaken to determine if materials containing asbestos are present; 2) The Retrofit Installer shall verify that the pre-installation building inspection has been independently checked by an appropriately qualified person (see B1-13) 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 CWI; and - not be paid by results nor remunerated only where an assessment is found to be valid; OR - 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.1 of PAS 2035:2023. 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.

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	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: a) range, scale geographical spread and complexity of the work being undertaken; and 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. NOTE 1 Where a vocationally competent operative is newly qualified, it might be appropriate for a higher 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. NOTE 2 Vocationally competent operatives should carry a document supporting the nature, currency and source of that competency, for production upon request.
B1-17	Measure-specific information to be handed over to the client in addition to 6.9	The Retrofit Installer shall handover to the client: • details of safe use and maintenance of the cavity wall insulation system, as specified by the supplier; • any relevant product warranty information and guarantees; and • Building Regulations compliance certificate where appropriate (or information explaining that a Building Regulations compliance certificate is required and will be provided within 30 days).

B.2 Measure BFM.2.2 – 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-I1 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-I2 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-I3 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-I4 of Table B2), with competence currency specified in B2-I5 of Table B.2 at the competency ratio specified in B2-I6 of Table B.2.

B.2.5 Provision of information in respect of draught proofing

The Retrofit Installer shall provide information identified at B2-I7 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
Measure type	As measure (no sub-division)
B2-I1 Additional installation requirements to those in the core of this PAS (Clause 4 to Clause 10)	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. 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. <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> <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>