

energy  
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## MCS scheme changes

Green Heat Installer  
Engagement Programme

20 November 2024



# Presenters

Pilar Rodriguez	Green Heat Installer Engagement Programme Manager, <b>Energy Saving Trust</b>	Presenter, Q&A Panel
Alex Hughes	Scheme Manager, <b>MCS</b>	Presenter, Q&A Panel

# Questions

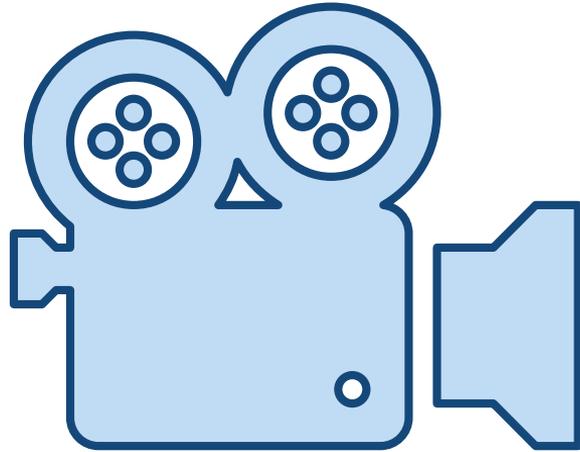
Type questions into the Questions pane of the control panel.

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

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



# Recording



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

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# Have Your Say



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

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

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# The key role of heat pumps in decarbonising Scotland's homes and buildings

Pilar Rodriguez

20 11 2024



# Green Heat Installer Engagement Programme



## Resources hub

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



## Green heat installer events

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



## Skills, funding and certification

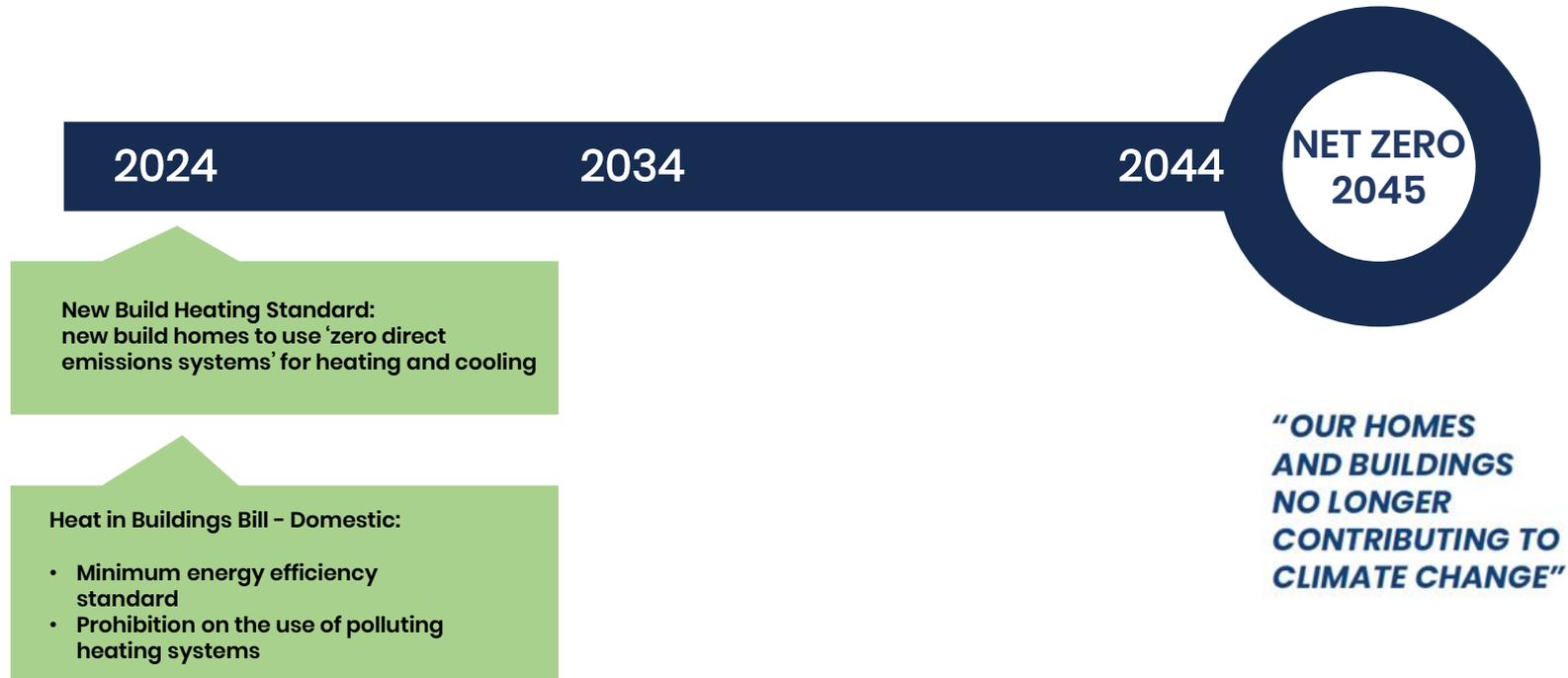
Discover the certification requirements as an installer or assessor looking to carry out work under various schemes.



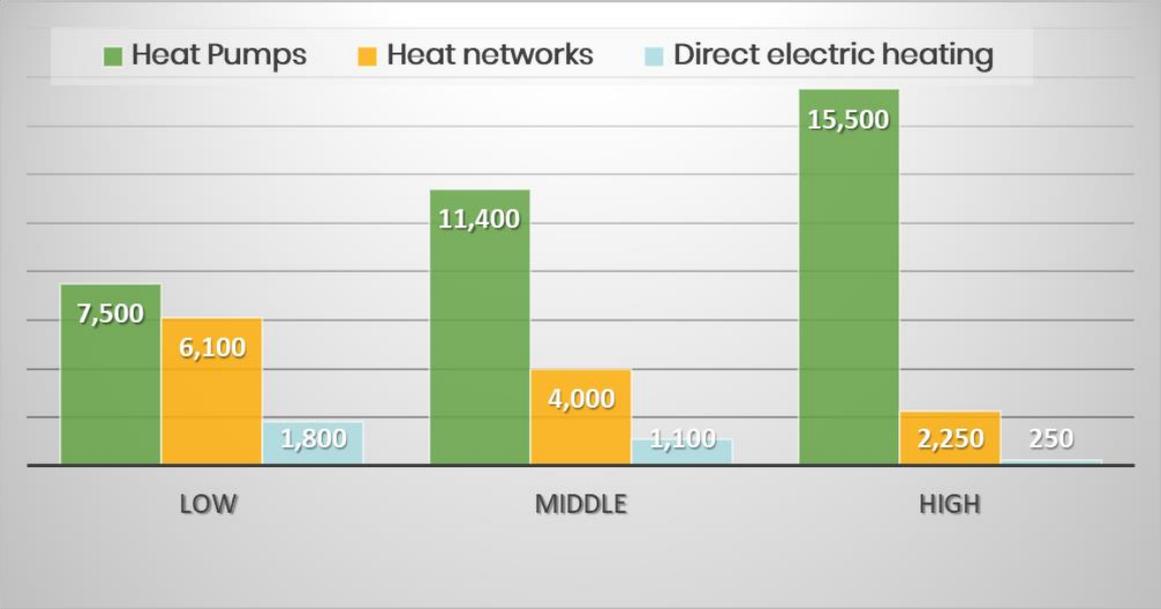
## Funding for your customers

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

# Reducing all "greenhouse gas emissions" to 100% by 2045



# The scale – workforce requirements



# Heat Pump Installer Toolkit

energy saving trust

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## Heat pump installers toolkit

### Contents

- 1 Why heat pumps?
  - 1.1 What is a heat pump?
  - 1.2 Policy & legislation
  - 1.3 Increased uptake
  - 1.4 Funding for heat pumps
  - 1.5 Heat pump myths
- 2 Installation considerations
  - 2.1 Differences between a gas boiler and a heat pump
  - 2.2 Who do I need in my team?
  - 2.3 Building survey
  - 2.4 Heat pump design
  - 2.5 Electrical load check
  - 2.6 Planning permission
  - 2.7 Where to source a heat pump?
- 3 Upskilling & qualifications
  - 3.1 Installer skills matrix
  - 3.2 Training providers
  - 3.3 Funding to support installer training
- 4 Heat pump certification
  - 4.1 Funding to become MCS certified

[Heat pump installers toolkit](#) / 2. Installation considerations

## 2. Installation considerations

What elements do you need to consider before installing a heat pump?

[Copy page link](#)

When installing a heat pump for the first time, there are a number of things that need to be considered. From the actual installation process to sourcing a heat pump, there are requirements you should look at when installing a heat pump.



# Mobile Heat Pump Training centre

Delivering training across Scotland



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

# Funding for MCS certification



## Scottish Government MCS certification fund for heat pumps:

- For heating engineers with an interest in installing heat pumps (either air, ground or water source)
- The grant pays 75%, up to a maximum of £1,000, of the certification fees
- To apply visit:

[energysavingtrust.org.uk/grants-and-loans/mcs-certification-fund](https://energysavingtrust.org.uk/grants-and-loans/mcs-certification-fund)

# The Renewables Installer Finder

- Free to join for MCS installers operating in Scotland
- Customer reviews of installed systems
- More than 600 reviews last year
- Customers can search by name, location and technology
- Register using MCS email address and password
- Direct links to profile page



**Installer registration**

The Renewables Installer Finder is proud to share on the MCS Installer Database. To register on the Renewables Installer Finder you must use the system email address and password that you used to register with MCS. Once your account has been created you can add further details of your company and add some details, such as search technologies you are MCS accredited to install or for maintenance provision.

By registering on the Renewables Installer Finder you are agreeing to our [data protection policies](#).

For further information about how we use your details please see our [privacy policy and cookie policy](#). Please note, the Energy Saving Trust may contact you in the future by email, post or telephone, to evaluate our service and monitor customer satisfaction.

If you have already registered please [login](#) to update your profile.

Search Email:

MCS Password:

[Forgot your password?](#)



[rif.est.org.uk/Installer/Registration](https://rif.est.org.uk/Installer/Registration)

# Support and funding for heat pumps in Scotland – domestic and non-domestic

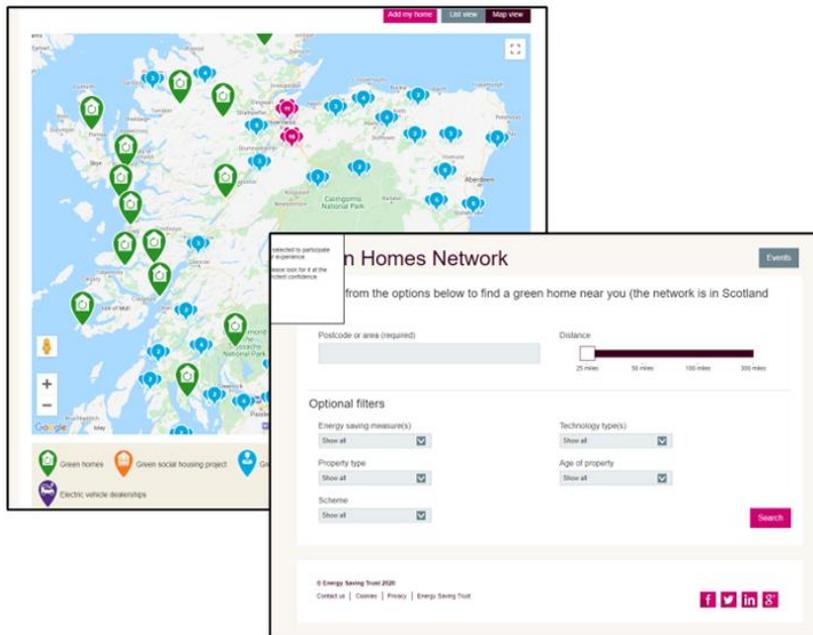
	Grant Funding	Loan Funding	Total Funding
SME Loan Scheme	£10,000	£100,000	£110,000
Home Energy Scotland Grant and Loan schemes	£7,500	£7,500	£15,000
Home Energy Scotland Grant and Loan schemes rural uplift*	£9,000	£7,500	£16,500

*\*The rural uplift is available to households in eligible rural and island postcodes*



# Green Homes Network

- Database of customer case studies to showcase work done.
- Customers can read about people who have done work that they are considering
- In some cases we can arrange email/phone calls/visits



[energysavingtrust.org.uk/tool/green-homes-network/](https://energysavingtrust.org.uk/tool/green-homes-network/)

# Green Heat Installer Engagement Programme – useful links



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



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



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



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

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Thank you





# MCS Scheme Redevelopment Update

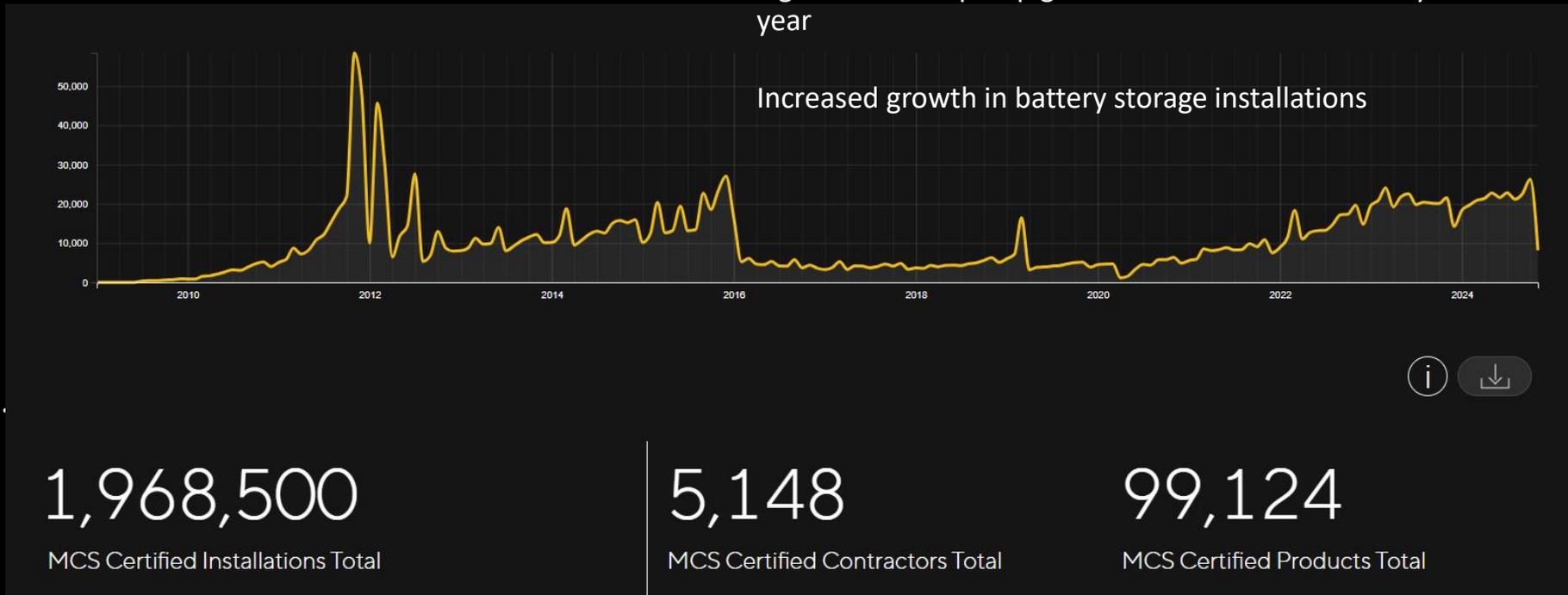
20<sup>th</sup> November 2024

# Scheme success

A record year for installations in 2023, with over 225,000 already registered this year

There are now over 5100 certified contractors on the scheme

Significant heat pump growth since 2023 and already a record year



# The case for change

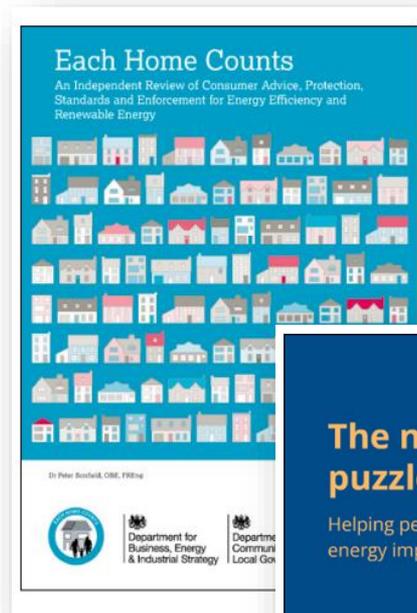
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In 2022, MCS conducted a review of how the industry operates

We commissioned extensive research with consumers and contractors

We reviewed all existing research and reports

**Taken together the findings made the case for change**



# Assessment

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*“The myriad schemes, brands, certification bodies and organisations operating across the energy efficiency and renewable energy sector give a confusing, even bewildering picture for the consumer.”*

## **Bonfield Review (2015) Each Home Counts**

*“Cutting through the current confusion caused by the number of protection schemes, codes and bodies is going to be vital”.*

*The target should be to “... give people the confidence to engage”, reflecting that “currently, for consumers considering home energy improvements there are too many opportunities for things to go wrong. It all needs to be a lot simpler.”*

## **Citizens Advice (2021) The net zero protections puzzle**





“Overwhelmingly, consumers indicate that they want **certified, qualified installers** who know what they’re doing and who have rules to follow and who install **products that meet standards** and are proven to work. **And they want to know there is some protection should anything go wrong.**”

## Consultation on proposed changes to MCS

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- Pre-consultation engagement with our key stakeholders
- The consultation ran from 5 June 2023 to the 17 July 2023
- Delivered 1,600 individual responses through the consultation's response form, correspondence and online polls.
- Generating over 4,000 data points for analysis

Contractor / Installation Company	53%
Consumer / Independent	14%
Trade Association	11%
Consumer Organisation	7%
Certification Body	7%
Manufacturer	7%
Other	1%



# A new scheme structure

## Gaining and maintaining certification

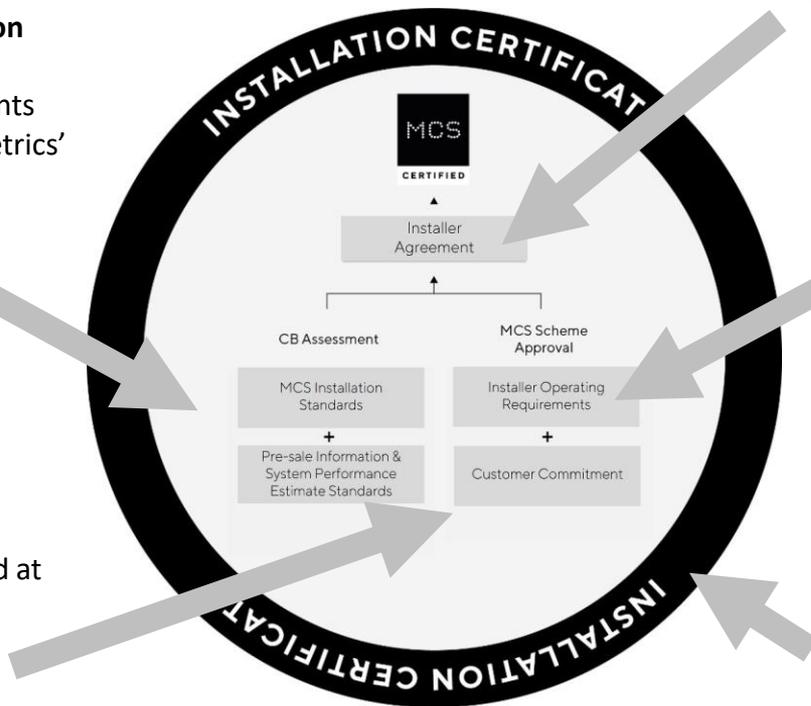
- Evidence of 'delivered quality'
- Risk based surveillance assessments
- Assessments of target 'quality metrics'

## Installer Agreement direct with the scheme

- Dependent upon maintenance of certification, initial and ongoing MCS Scheme Checks

## Consumer Protection

- Consumer protection embedded at the heart of the scheme, with obligations on installers to safeguard consumers



## Scheme compliance

- Adherence to Installer Operating Requirements
- Abide by Customer Commitment
- Comply with MCS Pre-sale Information and System Performance Estimate Standard

## Installation Certificate

An installer's statement of an installation's compliance

# Certification assessment framework

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## New scheme objectives

- Assessments to establish evidence of a quality installation as delivered to customers (which we refer to as “delivered quality”) and less focus on back-office systems and paperwork
- Assessments aligned to a prescribed list of quality metrics (Assessment Criteria)
- Implement a scheme-wide risk-based surveillance model that determines the frequency of assessments delivered by Certification Bodies (Quality Risk Model)
- A named Technical Supervisor for every installation



# What makes up our new scheme – for Certification Bodies

MCS
Giving you confidence in home-grown energy

## Conformity Assessment Guidelines

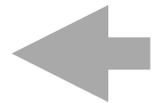
Issue 0001
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Verify the technical compliance of an installation ("Delivered Quality")

Technical Requirement/Quality	Reference	Minimum Evidence	Minimum Evidence	Evidence Reference	Max. Points Available
Technical Requirement/Quality	Reference	Minimum Evidence	Minimum Evidence	Evidence Reference	Max. Points Available
Other Requirement	Reference	Minimum Evidence	Minimum Evidence	Evidence Reference	Max. Points Available
Annual Service Performance Evidence	Reference	Minimum Evidence	Minimum Evidence	Evidence Reference	Max. Points Available
Minimum Technical Evidence/Performance	Reference	Minimum Evidence	Minimum Evidence	Evidence Reference	Max. Points Available

Assessment Criteria



[THIS AGREEMENT is made the \_\_\_\_\_ day of \_\_\_\_\_ 2024

**BETWEEN:**

- (1) **THE MCS SERVICE COMPANY LTD** a company registered in England (company registration no. 0756366) whose registered office is at Violet 3, First Floor, So-Tech Daresbury, (Westwood) Lane, Daresbury, Cheshire, W44 4AB ("MCS Company"); and
- (2) [.....] **[LIMITED] (PLC)** a company registered in [England] (company registration no. [.....]) whose (registered office) (principal place of business) is at [.....] (the "MCS Certification Body").

**BACKGROUND:**

- (A) MCS Company is a standards organisation that creates and maintains standards that allow for the certification of low carbon products used to produce electricity and heat from renewable sources, installers and their installations.
- (B) MCS Company owns the MCS Mark and operates the MCS Installer Scheme (the Scheme) under licence from the MCS Charitable Foundation. MCS Charitable Foundation is the parent company of MCS Company and Scheme Owner in the context of ISO/IEC 17067, granting under licence to responsibility as Scheme Owner for the development and maintenance of the Scheme to the MCS Company.
- (C) In its operation of the MCS Scheme, MCS Company is responsible for the oversight, development and maintenance of the Scheme, which includes the management and governance of the MCS standards and related Scheme documentation.
- (D) MCS Company wishes to support conformity assessments to its standards for Installers and their Installations. As such, MCS Company wishes to appoint Certification Bodies (CBs) to deliver these Assessments.
- (E) The Certification Body (CB) (having achieved and maintained Accreditation through UKAS, wishes to be appointed as an MCS Certification Body to deliver the Services.
- (F) Subject to the CB's compliance with the eligibility requirements detailed in Clause 2 below, MCS Company hereby agrees to appoint the CB as an MCS Certification Body and to grant the CB the right to deliver the Services in accordance with the terms and conditions of this Agreement.
- (G) All terms used in this Background section are defined below.

**IT IS AGREED:**

1. **Definitions and interpretation**
  - 1.1 In this Agreement
    - "Accreditation" means UKAS accreditation held by MCS Certification Bodies (CBs) in compliance with ISO/IEC 17065 (being the international standard for conformity assessment bodies certifying products, processes and services), and any amendments to or replacement thereof in relation to CBs appointment as an MCS Certification Body.

July 2024 v4 - Version in response to CB feedback

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# MCS Scheme approval framework

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**Ongoing assessment of business probity + overall Scheme conformity – proactive & reactive**

MCS responsible for approval with checks against **Installer Operating Requirements** and **Customer Commitment**

Repositioning and elevation of the MCS licence (**Installer Agreement**) awarded to the installer (to become legally binding & hold installer to account)

- Pre-entry Checks
- Ongoing Checks
- Monitoring Activity



## Summary of key changes for installers

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Existing scheme requirement	New scheme requirement
Operate under a sub-sub license agreement issued by CBs	Operate under an installer agreement held directly with MCS (Licensee within installer business will sign)
Installer shall operate a Quality Management System	Installer shall operate adequate processes and controls, appropriate to the size and complexity of their MCS related activities
Mandatory Consumer Code membership	Adhere to a Customer Commitment, in all interactions with customers
Installer shall specify a named Nominee and an NTP	Installers shall assign a Main Contact and a Technical Supervisor per installation
NTP must hold an in-date qualification/personnel certification, evidence of non-regulated training, complete an MCS approved independent assessment of competency	Technical supervisor (assigned to each installation) shall hold either an in-date qualification or a personnel certification (in accordance with ISO17024)
Installer shall raise an MCS certificate for each installation within 14 days from commissioning	Installer shall raise an MCS certificate for each installation within 30 days from commissioning

# The outcomes MCS hope to achieve for the sector

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## 1. Strengthen consumer protections

- Consistent management of escalated consumer complaints
- Speed of response, holding Installers to account aligned to metrics
- Deployment of an extended MCS consumer protection operation, with case handlers and field based technical assessors

## 2. Simplify requirements to drive compliance and accessibility

- Reducing the Installer burden without lowering standards
- Reset the MCS Installation Standards to represent the “technical truths”
- New Pre-sale information and System Performance Estimate Standards

## 3. Reinforced relationship with CBs and Installers

- Take ownership of our Scheme
- Constitute CB delivery to MCS requirements
- Direct contract between MCS and certified Installers

## 4. Reform of certification and ongoing compliance processes

- Embed consumer protections at the heart of MCS:2025 (Customer Commitment)
- Prescribed assessment criteria to ensure consistency
- Risk-based assessments to target CB resources

# Scheme publication

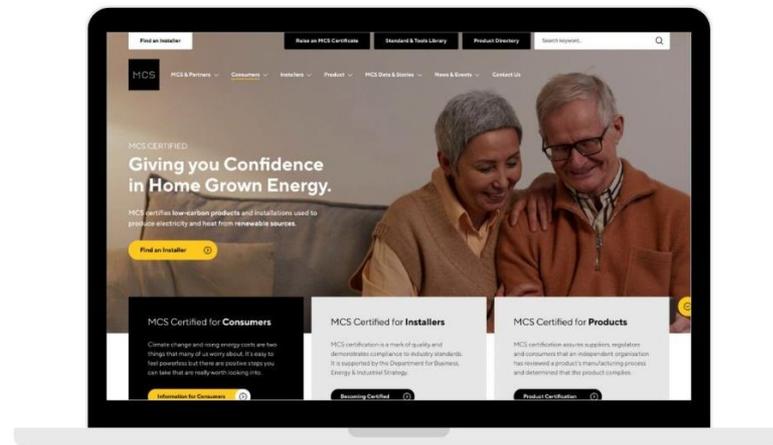
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Scheme documents will be published by end of January 2025  
in line with new website going live

Installers will need to familiarise themselves with the new  
documents and adopt into business operations

MCS continue to work with Certification Bodies to help them  
get ready for new scheme

Until an Installer's CB confirms the transition, Installers  
remain under the current scheme requirements, including  
maintaining membership of a consumer code.



Thank you – any questions?

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

## Panellists:

Pilar Rodriguez

Green Heat Installer  
Engagement Programme  
Manager, Energy Saving Trust

Alex Hughes

Scheme Manager, MCS



# energy saving trust

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



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Thank you for  
attending