Concerto

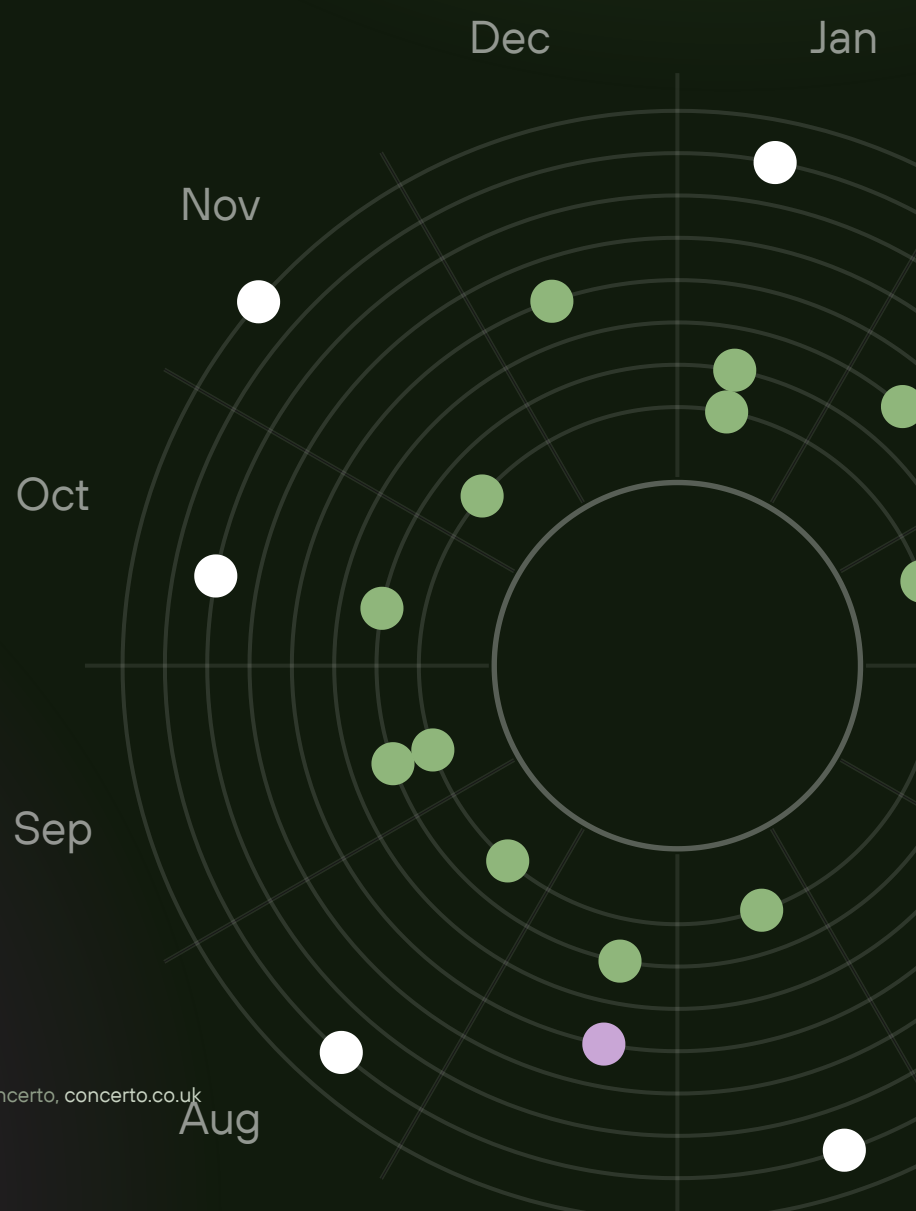
# The UK Estates Statutory Compliance Calendar 2027

Every inspection duty for a non-domestic building, what the law requires, the evidence to keep and what changes before 2028.

**28** inspection duties, each traced to its source

**8** with an interval fixed in law

**11** dated changes between now and 2028

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# The year at a glance

Every inspection, grouped by how often it comes round. The colour shows where the interval comes from: the law itself, your own risk assessment or written scheme, or published guidance.

● Fixed in law ● Set by your assessment ● Recommended by guidance

## Every week

- Fire alarm test
- Sprinkler pump test, 30 minutes
- Flush little-used outlets

## Every month

- Emergency lighting function test
- Extinguisher visual check
- Fire door check
- Sentinel outlet temperatures

## Every 3 months

- Showers and spray taps

## Every 6 months

- Fire alarm and detection
- Passenger lifts and equipment that lifts people

## Every year

- Emergency lighting
- Fire extinguishers and hose reels
- Fire doors and compartmentation
- Sprinklers and rising mains
- Cold water tanks, calorifiers and mixing valves
- Asbestos management plan
- Lightning protection
- Gas appliances, pipework and flues
- Other lifting equipment
- F-gas leak checks
- Display Energy Certificate

## Every 14 months

- Local exhaust ventilation

## Every 5 years

- Fixed electrical installation
- Air conditioning inspection

## On a set date

- Energy Performance Certificate and the minimum standard
- Energy Savings Opportunity Scheme

## When you decide

- Fire risk assessment
- Legionella risk assessment
- Portable appliances
- Pressure systems
- Fall protection and work at height equipment
- Powered doors, gates and barriers
- General risk assessments and workplace maintenance
- Radon

**How to use this calendar.** Start with the year at a glance, then check each duty in the register for the wording of the law and the evidence to keep. The Excel planner and the online calendar let you set the month each inspection falls due and copy the year for every site.

# Most inspection intervals are a choice the law leaves to you

We read each duty at its source. A minority name an interval in the regulation itself. The rest ask for maintenance that keeps people safe and leave the timing to a competent person, a written scheme or published guidance.

**8** Fixed in law | **9** Set by your assessment or scheme | **11** Recommended by guidance

### Fixed in law

The regulation itself names the interval. Missing it is a breach whatever your risk assessment says.

- Passenger lifts and equipment that lifts people
- Other lifting equipment
- Local exhaust ventilation
- Air conditioning inspection
- F-gas leak checks
- Display Energy Certificate
- Energy Performance Certificate and the minimum standard
- Energy Savings Opportunity Scheme

### Set by your assessment or scheme

The law requires the work and leaves the timing to a competent person, a risk assessment or a written scheme. Your documented decision is the standard you will be held to.

- Fire risk assessment
- Legionella risk assessment
- Fixed electrical installation
- Portable appliances
- Pressure systems
- Fall protection and work at height equipment
- Powered doors, gates and barriers
- General risk assessments and workplace maintenance
- Radon

### Recommended by guidance

The law requires maintenance. The interval comes from an approved code, a government guide or a British Standard, and following it is the usual way to show you complied.

- Fire alarm and detection
- Emergency lighting
- Fire extinguishers and hose reels
- Fire doors and compartmentation
- Sprinklers and rising mains
- Water temperature checks and flushing
- Showers and spray taps
- Cold water tanks, calorifiers and mixing valves
- Asbestos management plan
- Lightning protection
- Gas appliances, pipework and flues

## A common contract line, and what the source says

**PAT testing every year**

HSE says the regulations "don't make inspection or testing of electrical appliances a legal requirement". Appliances have to be maintained so they are safe, and how often you check depends on the equipment and where it is used.

**A legionella risk assessment every two years**

HSE: "The law does not prescribe that the risk assessment be reviewed on an annual or biennial basis." The code of practice asks for a regular review, and a fresh one whenever the assessment may be out of date.

**Cold water tank inspections every six months**

HSE's checklist for hot and cold water systems gives annual inspection for cold water storage tanks, and lets your risk assessment change any interval in it.

# The register

Each duty with the wording of the law, the evidence to keep and who does the work. Every source is linked in the Excel planner and the online calendar.

## Fire

### Fire risk assessment

Your assessment

Review regularly, and when anything significant changes

**The law:** Regulatory Reform (Fire Safety) Order 2005, article 9

**The source says:** "must be reviewed by the responsible person regularly so as to keep it up to date" (Fire Safety Order, article 9(3))

**Evidence to keep:** The written assessment and a record of each review

**Who:** The responsible person

### Fire alarm and detection

Guidance

Weekly test, six-monthly service

**The law:** Fire Safety Order, article 17

**The source says:** "subject to a suitable system of maintenance and are maintained in an efficient state, in efficient working order and in good repair" (Fire Safety Order, article 17(1))

**Evidence to keep:** Logbook of weekly tests, service reports and a record of false alarms

**Who:** A competent person for servicing

### Emergency lighting

Guidance

Monthly function test, annual full discharge test

**The law:** Fire Safety Order, article 17

**The source says:** "a monthly function test by operating the test facility" (Fire safety risk assessment: offices and shops, citing BS 5266)

**Evidence to keep:** A record of each test

**Who:** The occupier for monthly tests, a competent person for the annual test

### Fire extinguishers and hose reels

Guidance

Monthly check, annual maintenance

**The law:** Fire Safety Order, article 17

**The source says:** "Maintenance by a competent person should be carried out annually." (Fire safety risk assessment: offices and shops)

**Evidence to keep:** Service labels and a maintenance record

**Who:** A competent person

### Fire doors and compartmentation

Guidance

Monthly door check, annual compartmentation inspection

**The law:** Fire Safety Order, article 17

**The source says:** "Check that fire doors are in good working order and closing correctly" (Fire safety risk assessment: offices and shops)

**Evidence to keep:** A record of tests, repairs and alterations to passive fire protection

### Sprinklers and rising mains

Guidance

Weekly pump test, annual service for rising mains

**The law:** Fire Safety Order, article 17

**The source says:** "it would be prudent to carry out an annual service" (Fire safety risk assessment: offices and shops, on rising mains)

**Evidence to keep:** Contractor service records

**Who:** A competent maintenance contractor

**Applies if you have:** sprinklers or rising mains

## Water

### Legionella risk assessment

Your assessment

Review regularly, and when it may no longer be valid

**The law:** Health and Safety at Work etc. Act 1974; COSHH 2002; Approved Code of Practice L8

**The source says:** "The law does not prescribe that the risk assessment be reviewed on an annual or biennial basis." (HSE, legionella guidance for dutyholders)

**Evidence to keep:** The risk assessment and written scheme, kept while current and for at least two years after. Monitoring records for at least five years

**Who:** A competent person, with a named responsible person

# The register, continued

### Water temperature checks and flushing

Guidance

Weekly flushing, monthly temperatures

**The law:** Approved Code of Practice L8; HSG274 Part 2

**The source says:** "The risk assessment should define the frequency of inspection and monitoring" (HSG274 Part 2, paragraph 2.79)

**Evidence to keep:** A log of every check

### Showers and spray taps

Guidance

Clean and descale quarterly

**The law:** Approved Code of Practice L8; HSG274 Part 2

**The source says:** "Quarterly or as indicated by the rate of fouling" (HSG274 Part 2, checklist for hot and cold water systems)

**Evidence to keep:** A log of each clean

### Cold water tanks, calorifiers and mixing valves

Guidance

Inspect annually

**The law:** Approved Code of Practice L8; HSG274 Part 2

**The source says:** "Annually, or as indicated by the rate of fouling" (HSG274 Part 2, checklist for hot and cold water systems)

**Evidence to keep:** Inspection records, with remedial work closed out

## Asbestos

### Asbestos management plan

Guidance

Review at least every 12 months

**The law:** Control of Asbestos Regulations 2012, regulation 4

**The source says:** "the plan is reviewed and revised at regular intervals" (Control of Asbestos Regulations 2012, regulation 4(10))

**Evidence to keep:** The asbestos register, the written plan and a record of the actions taken

**Who:** The dutyholder

## Electrical

### Fixed electrical installation

Your assessment

Often enough to prevent danger. Five years is the usual maximum

**The law:** Electricity at Work Regulations 1989, regulation 4(2)

**The source says:** "all systems shall be maintained so as to prevent, so far as is reasonably practicable, such danger" (Electricity at Work Regulations 1989, regulation 4(2))

**Evidence to keep:** The inspection and test report, with remedial work closed out

**Who:** A competent electrician

### Portable appliances

Your assessment

By risk. No test is required by law

**The law:** Electricity at Work Regulations 1989, regulation 4(2)

**The source says:** "they don't make inspection or testing of electrical appliances a legal requirement" (HSE, portable appliance testing FAQs)

**Evidence to keep:** No format is prescribed. Keep what your risk assessment calls for

### Lightning protection

Guidance

Inspect and test at least annually

**The law:** Recommended by BS EN 62305

**The source says:** "inspected and tested at least annually" (Good estate management for schools, quoting BS EN 62305)

**Evidence to keep:** The test certificate

## Gas

### Gas appliances, pipework and flues

Guidance

Annual inspection as a reasonable minimum

**The law:** Gas Safety (Installation and Use) Regulations 1998, regulation 35

**The source says:** "maintained in a safe condition so as to prevent risk of injury to any person" (Gas Safety (Installation and Use) Regulations 1998, regulation 35)

**Evidence to keep:** Service and inspection records

**Who:** A Gas Safe registered engineer

**Applies if you have:** gas appliances

# The register, continued

## Lifts and lifting

### Passenger lifts and equipment that lifts people

Fixed in law

Thorough examination at least every 6 months

**The law:** Lifting Operations and Lifting Equipment Regulations 1998, regulation 9(3)

**The source says:** "in the case of lifting equipment for lifting persons or an accessory for lifting, at least every 6 months" (LOLER 1998, regulation 9(3)(a)(i))

**Evidence to keep:** Thorough examination reports, kept until the next report or for two years, whichever is later

**Who:** A competent person

**Applies if you have:** lifts or lifting equipment

### Other lifting equipment

Fixed in law

Thorough examination at least every 12 months

**The law:** Lifting Operations and Lifting Equipment Regulations 1998, regulation 9(3)

**The source says:** "in the case of other lifting equipment, at least every 12 months" (LOLER 1998, regulation 9(3)(a)(ii))

**Evidence to keep:** Thorough examination reports, kept until the next report or for two years, whichever is later

**Who:** A competent person

**Applies if you have:** lifts or lifting equipment

## Pressure

### Pressure systems

Your assessment

As your written scheme of examination specifies

**The law:** Pressure Systems Safety Regulations 2000, regulations 8 and 9

**The source says:** "shall not operate the system or allow it to be operated unless he has a written scheme for the periodic examination" (Pressure Systems Safety Regulations 2000, regulation 8)

**Evidence to keep:** The written scheme and each examination report

**Who:** A competent person writes or certifies the scheme and carries out the examination

**Applies if you have:** steam, boilers or compressed air

## Air and cooling

### Local exhaust ventilation

Fixed in law

Thorough examination at least every 14 months

**The law:** Control of Substances Hazardous to Health Regulations 2002, regulation 9

**The source says:** "in the case of local exhaust ventilation plant, at least once every 14 months" (COSHH 2002, regulation 9(2)(a))

**Evidence to keep:** Examination and test records, kept for at least five years

**Who:** A competent person

**Applies if you have:** extraction in labs or workshops

### Air conditioning inspection

Fixed in law

No more than 5 years apart

**The law:** Energy Performance of Buildings (England and Wales) Regulations 2012

**The source says:** "The inspections must be no more than 5 years apart." (GOV.UK, a guide to air conditioning inspections)

**Evidence to keep:** The most recent inspection report

**Who:** An accredited energy assessor

**Applies if you have:** air conditioning or refrigeration

### F-gas leak checks

Fixed in law

Every 12 months from 5 tonnes CO2 equivalent, every 6 months from 50

**The law:** Fluorinated greenhouse gases regulation, as it applies in Great Britain

**The source says:** "At least once every 12 months" (GOV.UK, checking F-gas equipment for leaks (5 to under 50 tonnes CO2 equivalent))

**Evidence to keep:** Records of the gas, quantities, leak checks and contractor certificates, kept for five years

**Who:** A certified contractor

**Applies if you have:** air conditioning or refrigeration

# The register, continued

## Energy

### Display Energy Certificate

Fixed in law

Every 12 months over 1,000 m². Every 10 years from 250 to 1,000 m²

**The law:** Energy Performance of Buildings (England and Wales) Regulations 2012

**The source says:** "the DEC is valid for 12 months" (GOV.UK, a guide to Display Energy Certificates (buildings over 1,000 m²))

**Evidence to keep:** The certificate on display, and the advisory report

**Who:** An accredited energy assessor

**Applies if you have:** public authority buildings

### Energy Performance Certificate and the minimum standard

Fixed in law

Valid for 10 years. Minimum E rating to let

**The law:** Energy Performance of Buildings Regulations 2012; minimum energy efficiency standard

**The source says:** "required when a building is constructed, sold or rented out" (GOV.UK, a guide to EPCs for non-dwellings)

**Evidence to keep:** A valid certificate for each building you sell or let

**Who:** An accredited non-domestic energy assessor

### Energy Savings Opportunity Scheme

Fixed in law

Every 4 years. Phase 4 notification by 5 December 2027

**The law:** Energy Savings Opportunity Scheme Regulations 2014

**The source says:** "employs 250 or more people" (GOV.UK, ESOS guidance, on who qualifies)

**Evidence to keep:** The evidence pack, the notification and the action plan

**Who:** A lead assessor

**Applies if you have:** a large undertaking (250+ staff)

## Height and access

### Fall protection and work at height equipment

Your assessment

At suitable intervals

**The law:** Work at Height Regulations 2005, regulation 12

**The source says:** "any deterioration can be detected and remedied in good time" (Work at Height Regulations 2005, regulation 12(3))

**Evidence to keep:** Inspection records

**Who:** A competent person

### Powered doors, gates and barriers

Your assessment

As the manufacturer's instructions and your risk assessment set

**The law:** Workplace (Health, Safety and Welfare) Regulations 1992, regulations 5 and 18

**The source says:** "Doors and gates shall be suitably constructed (including being fitted with any necessary safety devices)." (Workplace Regulations 1992, regulation 18)

**Evidence to keep:** Maintenance and safety check records

## General

### General risk assessments and workplace maintenance

Your assessment

Review when no longer valid, or after significant change

**The law:** Management of Health and Safety at Work Regulations 1999, regulation 3; Workplace Regulations 1992, regulation 5

**The source says:** "subject to a suitable system of maintenance" (Workplace Regulations 1992, regulation 5(2))

**Evidence to keep:** The risk assessments and the maintenance system records

### Radon

Your assessment

Measure where the risk assessment calls for it

**The law:** Ionising Radiations Regulations 2017

**The source says:** "above the defined level of 300 Bq/m³ (as an annual average)" (HSE, radon in the workplace)

**Evidence to keep:** Measurement results and the risk assessment

# What's changing between now and 2028

Dates an estates team should have in the diary. Where a date is expected, proposed or not yet set, the marker is hollow.

### What this could mean for you

**Phone lines go first.** Move and test lift lines, alarms and CCTV on copper before 31 January 2027.

**You appoint the asbestos analyst.** Removal contractors cannot from November 2027. Update contracts now.

**Sites for 200+ people must notify the SIA**, within three months of Martyn's Law starting.

**Start on site by 24 March 2028** to keep projects under the current energy rules.

**Merging councils inherit your records.** Registers, certificates and contracts transfer on go-live day.

| | | | |
|---|---|---|---|
| ● 25 November 2026 | **Asbestos regulations amended**<br>The amending regulations take effect. The change to who appoints the clearance analyst follows a year later. | All estates<br>legislation.gov.uk |
| ● 5 December 2026 | **ESOS Phase 3 progress update due**<br>Large undertakings report progress against their Phase 3 action plan. | Private sector<br>GOV.UK |
| ● 31 December 2026 | **ESOS Phase 4 qualification date**<br>Organisations that meet the size test on this date are in scope for Phase 4. | Private sector<br>GOV.UK |
| ● 31 January 2027 | **Traditional phone lines go digital**<br>Lift phones, alarm signalling and CCTV on analogue lines need to be moved or tested before the switch. | All estates<br>Openreach |
| ● 24 March 2027 | **Future Homes and Buildings Standards**<br>New energy standards for building work come into force, and on 24 September 2027 for higher-risk buildings. Applications made before the date keep the old rules only if work starts by 24 March 2028. | All estates<br>GOV.UK |
| ● April 2027 | **East Surrey and West Surrey councils go live**<br>The first new unitary councils of this round take over the buildings, systems and records of the councils they replace. | Public sector<br>GOV.UK |
| ○ Expected spring 2027 | **Martyn's Law comes into force**<br>Premises for 200 to 799 people fall in the standard tier and 800 or more in the enhanced tier. Notify the Security Industry Authority within three months of commencement. | All estates<br>GOV.UK |
| ● 25 November 2027 | **Independent asbestos clearance**<br>From this date the contractor that did the removal can no longer appoint the analyst who carries out the four-stage clearance. | All estates<br>legislation.gov.uk |
| ● 5 December 2027 | **ESOS Phase 4 notification deadline**<br>Qualifying organisations notify compliance. The action plan follows by 5 December 2028. | Private sector<br>GOV.UK |
| ○ May 2028 | **Shadow elections in five reorganising areas**<br>Proposed: East Sussex and Brighton and Hove, Gloucestershire, Oxfordshire, Warwickshire and Worcestershire, with new councils planned for 2029. | Public sector<br>GOV.UK |
| ○ To be confirmed | **Other reorganising areas**<br>Timelines for Essex, Hampshire, Norfolk, Suffolk, West Sussex and 14 further areas are not yet set. | Public sector<br>GOV.UK |
| ● 5 December 2028 | **ESOS Phase 4 action plan due**<br>Progress updates then follow in 2029 and 2030. | Private sector<br>GOV.UK |

# When the inspector arrives, the question is whether you can evidence it

For each duty in the register, an inspector or auditor will ask to see five things.

| | | |
|---|---|---|
| 01 | **The duty** | Which regulation applies to this asset, in this building. |
| 02 | **The schedule** | The interval you work to, and whether law, a written scheme or guidance set it. |
| 03 | **The competent person** | Who did the work, and what makes them competent to do it. |
| 04 | **The record** | The report or certificate, dated and tied to the asset. |
| 05 | **The close-out** | Every defect raised by the inspection, with proof it was fixed. |

## How long to keep it

Minimum retention periods written into the regulations and approved codes. Many estates keep records longer for insurers and auditors.




Further out: from 2 September 2029 the BS 476 fire resistance classes leave Approved Document B. Government proposes an EPC B minimum from 2031 for privately rented non-domestic buildings over 1,000 m², which still needs legislation. Buildings under 1,000 m² stay at EPC E, with no new deadline set. The EPC C step planned for 2027 has been dropped.

# Your 2027 plan

Print this page and mark the month each inspection falls due on your site. The Excel planner does this for you, one tab per site.

| Inspection | Usual | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Fire risk assessment | Your call | | | | | | | | | | | | |
| Fire alarm and detection | 6 months | | | | | | | | | | | | |
| Emergency lighting | Yearly | | | | | | | | | | | | |
| Fire extinguishers and hose reels | Yearly | | | | | | | | | | | | |
| Fire doors and compartmentation | Yearly | | | | | | | | | | | | |
| Sprinklers and rising mains | Yearly | | | | | | | | | | | | |
| Legionella risk assessment | Your call | | | | | | | | | | | | |
| Water temperature checks and flushing | Your call | | | | | | | | | | | | |
| Showers and spray taps | 3 months | | | | | | | | | | | | |
| Cold water tanks, calorifiers and mixing valves | Yearly | | | | | | | | | | | | |
| Asbestos management plan | Yearly | | | | | | | | | | | | |
| Fixed electrical installation | 5 years | | | | | | | | | | | | |
| Portable appliances | Your call | | | | | | | | | | | | |
| Lightning protection | Yearly | | | | | | | | | | | | |
| Gas appliances, pipework and flues | Yearly | | | | | | | | | | | | |
| Passenger lifts and equipment that lifts people | 6 months | | | | | | | | | | | | |
| Other lifting equipment | Yearly | | | | | | | | | | | | |
| Pressure systems | Your call | | | | | | | | | | | | |
| Local exhaust ventilation | 14 months | | | | | | | | | | | | |
| Air conditioning inspection | 5 years | | | | | | | | | | | | |
| F-gas leak checks | Yearly | | | | | | | | | | | | |
| Display Energy Certificate | Yearly | | | | | | | | | | | | |
| Energy Performance Certificate and the minimum standard | Your call | | | | | | | | | | | | |
| Energy Savings Opportunity Scheme | Your call | | | | | | | | | | | | |
| Fall protection and work at height equipment | Your call | | | | | | | | | | | | |
| Powered doors, gates and barriers | Your call | | | | | | | | | | | | |
| General risk assessments and workplace maintenance | Your call | | | | | | | | | | | | |
| Radon | Your call | | | | | | | | | | | | |

● Fixed in law ● Set by your assessment ● Recommended by guidance

# Run this calendar across your whole estate

Concerto holds the asset register, the planned maintenance schedules and the compliance records in one place, so the answer is already there when an inspector, an auditor or your board asks.

See Concerto in action

concerto.co.uk/lp/planned-maintenance-software

- ✓ Over 450 customer estates
- ✓ Built in the UK since 2004
- ✓ ISO/IEC 27001 and Cyber Essentials

**England, Wales, Scotland and Northern Ireland.** The register is written for England. Most of it carries across Great Britain. Fire law differs in Scotland (Fire (Scotland) Act 2005) and Northern Ireland (its own 2006 Order and 2010 Regulations); energy certificates here follow the England and Wales regulations; Northern Ireland has parallel health and safety regulations enforced by HSENI.

This calendar is a planning aid for non-domestic buildings. It summarises legislation and published guidance and does not replace your own risk assessments, written schemes or professional advice. Where a regulation leaves the interval to a competent person, their decision for your building takes precedence over anything shown here.

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