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1		INTERNATIONAL ELECTROTECHNICAL COMMISSION
2		
3		IEC TS 60079-44
4		EXPLOSIVE ATMOSPHERES
5		Part 44: Personal Competence
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Enquiry draft	Report on voting
XX/XX/DTS	XX/XX/RVDTS

- Full information on the voting for the approval of this document can be found in the report on voting indicated in the above table.
- The language used for the development of this document is English.

This document was drafted in accordance with ISO/IEC Directives, Part 2, and developed in accordance with ISO/IEC Directives, Part 1 and ISO/IEC Directives, IEC Supplement, available at www.iec.ch/members\_experts/refdocs. The main document types developed by IEC are described in greater detail at www.iec.ch/standardsdev/publications.

The committee has decided that the contents of this publication will remain unchanged until the stability date indicated on the IEC web site under "http://webstore.iec.ch" in the data related to the specific publication. At this date, the publication will be

- 52 transformed into an International standard,
- 53 reconfirmed,
- 54 withdrawn,
- 55 replaced by a revised edition, or
- 56 amended.
- 57

58	The National Committees are requested to note that for this publication the stability date is
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61

#### Introduction

62

The objective of this Document is to minimize the impact on safety and integrity of facilities, 63 where hazardous areas may be present, due to human error that may result from an individual's 64 lack of knowledge, skills, or abilities during the performance of certain activities. This document 65 explains how the minimum requirements for the competence and management of competencies 66 of personnel working in industries where hazardous areas may be present can be achieved. 67 Assurance that individuals who perform such tasks and those individuals responsible for 68 ensuring a qualified workforce are competent according to this document will also support the 69 achievement of the stated objective. 70

Competence depends on knowledge, skill, experience, and training. Verification of competence is a difficult task and requires specific assessment methods based on clear criteria. In establishing these criteria, it is acknowledged that:

- The competencies for conducting work in facilities where explosive atmospheres may be
  present are in addition to any competencies which may apply for the specific type of work
  being undertaken, for example, electrical, mechanical, operations.
- Competencies for working in hazardous areas vary by the individual roles and tasks
  performed (see Section 8), and the protection techniques used.
- As protection techniques adopt quite different and individual design and installation
  requirements it is common for personnel to be trained and competent either in some or all
  these techniques.

Regarding the assurance of competence, it is recognised that competence evolves with years but can also deteriorate if not applied, and so continued training and assessment to verify competence is necessary. Where training or assessment of competence is required it is expected that those conducting these activities should have at least the same level of competence as those being trained or assessed. These and other specific processes and requirements might also be defined in other publications that are employed in competence certification systems.

#### 90 **1 Scope**

The purpose of this document is to provide guidance to establish recommended minimum criteria to determine roles, establish expectations of the necessary skills and evidence of competence to assess and manage the competence of personnel conducting work in or associated with hazardous areas.

This document provides examples and recommendations of minimum levels of competence for typical roles associated with hazardous areas by addressing the knowledge, skills, or abilities that is expected of personnel, and provides examples of the evidence of competence expected for each role.

This document is to assist employers in developing a programme to define, assess and manage requirements for competence. Such a programme could be unique to a facility or used in conjunction with other regulatory requirements where they exist. The competencies for conducting work in a hazardous area are in addition to any competencies which may apply for the general type of work being undertaken (for example, professional credentials, electrical, non-electrical, operations, design).

105 This document applies to both electrical and non-electrical applications.

#### 106 2 References

The following documents are referred to in the text in such a way that some or all of their content
 constitutes requirements of this document. For dated references, only the edition cited applies.
 For undated references, the latest edition of the referenced document (including any
 amendments) applies.

- IEC 60050-426, International Electrotechnical Vocabulary Part 426: Equipment for
  explosive atmospheres.
- 113 IEC 60079-0 Explosive atmospheres Part 0: Equipment General requirements
- IEC 60079-17, Explosive atmospheres Part 17: Electrical installations, inspection, and
  maintenance

#### 116 **3 Definitions**

- For the purposes of this document, the terms and definitions given in IEC 60079-0 and the following apply.
- ISO and IEC maintain terminological databases for use in standardization at the followingaddresses:
- IEC Electropedia: available at http://www.electropedia.org/
- ISO Online browsing platform: available at http://www.iso.org/obp

#### 123 **3.1**

#### 124 first-party verification

- process where an individual self-declares their credentials and competency.
- 126 Note 1 to entry: permitting first-party verification for individuals working in hazardous areas could result in liability 127 issues for the employer

#### 128 **3.2**

#### 129 second-party verification

- process where the employer, a person or organization appointed by the employer assesses an individual to a defined set of competency requirements.
- 132 **3.3**

#### 133 third-party verification

- process where an organization independent of the employer, or its contractors, assesses individuals against a defined set of competency requirements.
- Note 1 to entry: Third-party verification organizations typically satisfy ISO/IEC17024 requirements and are assessed
  by a National Accreditation Body.

#### 138 **3.4**

#### 139 prerequisite qualifications

140 knowledge, skills, and capabilities required to perform an assigned role or task in non-141 hazardous areas.

Note 1 to entry: Some work roles may require registration or licencing by a local or national authority to verify,
 approve or endorse specific base knowledge. For example, professional engineer or tradespersons professional
 registration or licencing.

#### 145 **3.5**

#### 146 competence

- ability to apply knowledge and skills to achieve intended results.
- 148 [SOURCE: ISO/IEC 17024:2012, 3.6]

#### 149 **3.6**

- 150 hazardous area
- area in which an explosive atmosphere is present, or can be expected to be present, in quantities such that special precautions for the construction, installation and use of equipment are required.
- Note 1 to entry: IEC 60079-10-1, Explosive atmospheres Part 10-1: Classification of areas Explosive gas atmospheres, gives a classification of hazardous areas containing explosive gas atmospheres (see IEV 426-03-03, IEV 426-03-04 and IEV 426-03-05).
- Note 2 to entry: IEC 60079-10-2, Explosive atmospheres Part 10-2: Classification of areas Explosive dust atmospheres, gives a classification of hazardous areas containing explosive dust atmospheres (see IEV 426-03-23, IEV 426-03-24, and IEV 426-03-25).
- 160 [SOURCE: IEC 60050 426-03-01]

#### 161 **3.7**

#### 162 non-hazardous area

- area in which an explosive atmosphere is not expected to be present in quantities such as
  special precautions for the construction, installation and use equipment.
- 165 [SOURCE: IEC 60050 426-03-02]
- 166 **3.8**

#### 167 equipment

- apparatus, fittings, devices, components, and the like used as a part of, or in connection with,an installation
- 170 [SOURCE: IEC 60050 426-01-01]
- 171 **3.9**

#### 172 **Ex Equipment**

- 173 explosion-protected equipment
- Note 1 to entry: Such equipment often includes Ex Components, but additional evaluation is always required as part
  of their incorporation into equipment.
- 176 [SOURCE: IEC 60050 426-01-14]

#### 177 **3.10**

#### 178 qualified assessor

individual with enough knowledge, skills, and experience to undertake assessments

180 Note 1 to entry: This is likely to require on-site experience, understanding, interpreting and applying technical 181 content, such as in IEC 60079-17, along with successful completion of nationally recognized training/assessment 182 courses.

#### 183 **3.11**

- 184 role
- tasks or responsibilities within the context of an organization that identify the responsibility and
  authority assigned to specific persons
- 187 **3.12**

#### 188 verification

- confirmation of truthfulness, through the provision of objective evidence that specified requirements have been fulfilled.
- 191 [SOURCE: ISO/IEC 17000]

192 Note 1 to entry: Verification can be applied to claims to confirm the information declared with the claim regarding 193 events that have already occurred or results that have already been obtained.

#### 194 **4 General**

195 Competence depends on specific knowledge, skill, and experience. Measurement of 196 competence is a difficult task and requires assessment methods specific to the role being 197 performed. Competence can develop with experience but can also deteriorate over time, 198 therefore continued training or reassessment of competency can be required.

- 199 Competence assessors should have suitable qualifications for both:
- the activity being assessed; and
- the assessment methodologies to be used.

#### **5** Typical evidence of competence

#### 203 **5.1 General**

Individuals should demonstrate they have the knowledge and skills relevant to the Type(s) of
 Protection, Types of ex Equipment, or safety related requirements necessary to perform their
 assigned tasks.

- Evidence that can be used to verify an individual's competence and ability to perform their assigned task includes, but is not limited to:
- review and confirmation of validity of applicable documentation such as educational records
  and professional credentials;
- 211 documentation of experience;
- 212 practical skills evaluation;
- 213 theoretical assessment such as exams; and
- second-party verification or third-party verification of knowledge and skills in accordance
  with Clause 8.
- 216 NOTE In many jurisdictions it is the legal responsibility of the owner or operator of a facility to ensure that individuals 217 conducting work have received appropriate training and are competent to complete the tasks assigned to them.

#### 218 **5.2 Prerequisite qualifications**

The competence assessment in this document is to assist employers define requirements in addition to any prerequisite qualifications expected of an individual to perform a specific role as required where National requirements are not in place.

222 Some of the roles identified in this document recommend prerequisite qualifications are likely 223 to be necessary to meet the objectives.

- NOTE 1: Prerequisite qualifications include items such as educational or professional credentials and licences to work required by applicable regulations.
- NOTE 2 For example, a prerequisite qualification for an installer could be electrician qualifications in addition to being competent to perform other roles identified in this document such as maintenance.

#### **5.3** Recommendations for the verification of Ex competence

Ex competence may be verified through written or verbal tests, by witnessing of work inprocess, or assessment of competency verification systems. The results of the verification should be documented, including the verification methodology used and the level of results attained. The verification should be traceable and auditable.

- Employers should consider including a second-party verification or third-party verification systems in their employment, contract, or procurement processes.
- First-party verification for individuals working in, or associated with, hazardous areas should not be permitted.
- 237 NOTE Documents such as ISO/IEC 17024 provide guidance for assessment and certification of competence.

#### 238 6 Task competency expectations

- The level of competence required for specific operations should be determined. This could include assigning a competence level required for certain tasks rather than defining a specific role.
- Competence expectations should be identified according to the complexity and risk associated with the task and can vary by employer, role, operator, or facility.
- NOTE For example, the minimum competency expectation for personnel that only install Cable Glands can require different competencies to that of personnel who are expected to install more complex equipment.
- The skill level of a manufacturer's technician working on their equipment is not expected to be the same as the person carrying out the installation of that equipment.
- A programme to assess the competence of individuals for specific roles should be established, including pass-fail criteria. (see Clause 9).

#### **7** Party legally responsible for a facility

#### 251 **7.1 General**

The party legally responsible for a facility should ensure the organizational structure and competency of the staff maintains the safety of the facility. The responsibilities and authorities should be clearly defined and communicated within the organization. These should:

<sup>255</sup> – be appropriate to the purpose of the organization;

- <sup>256</sup> be appropriate to the management structure of the organization;
- <sup>257</sup> include a commitment to comply with regulatory requirements.
- <sup>258</sup> be communicated and understood within the organization;
- <sup>259</sup> be periodically reviewed for continuing suitability; and
- identify or delegate the responsibility to ensure compliance and maintain the integrity of the
  equipment and facility (see 8.11).

#### **7.2** Internal quality audit of competency management system

#### 263 7.2.1 General

Internal auditing of a competency management system to be implanted to assess the effectiveness of the system. The auditing technique can include the interview of selected individuals using an "explain" and "show me" sampling technique.

Auditing should be a structured activity based upon a formal programme. Documents such as ISO 19011 provide guidance on the management of an audit programme, its planning and conduct.

- **7.2.2 Examples of typical auditing tasks**
- Audits may have a specific focus based on the auditor's prior experience or knowledge of typically weak areas, event history at the facility, management priorities and regulatory requirements.
- Examples of typical auditing tasks include, but are not limited to, to confirm that:
- Ex and relevant management processes are appropriate, up to date and available to those
  who need them;
- roles and responsibilities are clearly defined and assigned to the appropriate personnel to
  allow the management processes to be implemented;
- 279 people clearly understand their duties and are competent to carry them out;
- Ex Equipment integrity is well managed and documented, and appropriate records are kept
  of equipment installed, work carried out, inspections performed and findings;
- 282 records and documentation are kept accurate and current; and
- management of change procedures relating to hazardous areas and Ex Equipment is in
  place, and correctly implemented.

#### **7.2.3 Examples of evidence of competence**

- The auditor should have competence in the audit process, knowledge of the activities to be audited and should be independent of the part of the organization that is being audited. Examples of evidence of competence can include, but are not limited to:
- having prior experience in the audit process including; plan, conduct, prepare an opening
  meeting and conduct close out presentations and reports. (ref. ISO 19011); and
- being experienced in the range of measures required to manage Ex Equipment in hazardous
  areas including:
- a) understanding the requirements of the applicable national or international legislation;

- b) being familiar with the legislation governing the management of Ex Equipment;
- c) being able to demonstrate a practical understanding of the requirements for Ex areas,
  explosion protection principles and installation, maintenance, and repair requirements;
  and
- d) having prior working experience in various aspects of Ex tasks related to hazardous areas.

#### **8** Roles associated with hazardous areas where competence should be verified

#### 301 8.1 General

- This section provides examples of roles of individuals working in, or associated with, hazardous areas. Each role is based on the typical tasks performed with examples for the evidence of competence for those tasks.
- Continuing education or training to maintain the level appropriate of competence for each task associated with a role is advisable.
- 307 NOTE 1 Assessment of competence is addressed in Clause 9
- 308 NOTE 2 Reassessment of competence is addressed in Clause 10.
- NOTE 3 Certain tasks can additionally include the use of a Permit to Work (PTW) management system to ensure
  that work conducted in a facility is performed safely and efficiently.

#### 311 8.2 Area Classification

#### 312 8.2.1 General

The area classification should be carried out by personnel who understand the relevance and significance of the properties of the flammable substances, sources of release, principles of dispersion, and the potential for an explosive atmosphere to develop.,Personnel should be familiar with the activities, process, and the equipment.

Area classification typically requires inputs from other disciplines such as electrical, nonelectrical, process engineers, plant operations personnel and others as applicable. Personnel involved in area classification should have a broad range of experience and appropriate analytical skills.

Competence should be relevant to the nature of the facility and methodology used for carrying out the area classification.

#### 323 8.2.2 Examples of area classification tasks

- 324 Typical area classification tasks include, but are not limited to:
- area classification involving gathering and analysing of data relative to explosion hazards;
- 326 identification of the relevant characteristics of the flammable materials;
- identification of the type and extent of the hazardous area in accordance with the
  appropriate codes or regulations for the jurisdiction of the facility and material(s) involved;
- determination of the types and availability of ventilation for gases / vapours and the impact
  it has on the hazardous area (such as in IEC 60079-10-1);
- determination of the type dusts involved and the potential for explosive dust atmospheres
  or dust layering forming (such as in IEC 60079-10-2);

- Consideration of any influence due to environmental conditions; and
- preparation of drawings and documentation to identify the hazardous areas within a facility,
  and the associated risks that occur in those areas;

#### **8.2.3** Examples of evidence of area classification competence

- 337 Typical evidence of area classification competence includes, but is not limited to:
- understanding of the relevant standards and guidance documents applicable to the
  jurisdiction of work and the legal expectations of the local jurisdiction;
- ability to interpret the input from others as appropriate to understand the processes within
  a facility and the necessary documents required to enable area classification;
- 342 ability to identify and grade all potential release sources and the impact of ventilation;
- ability to determine the extent of the zone using appropriate look-up tables, reference
  materials or calculations taking into account their limits of use; and
- ability to understand the relationship between equipment, processes, and area classification
  where changes or modifications in one area can affect other area(s).
- NOTE Multiple standards and guidance documents are available and specific to the application and jurisdiction. This document does not attempt to list them. (such as IEC 60079-10-1 and IEC 60079-10-2) 349

#### **8.3 Design of systems or installations for hazardous areas**

#### 351 8.3.1 General

The design of installations in hazardous areas should be carried out by those who understand the various Types of Protection, installation practices, relevant rules and regulations and the general principles of area classification.

A designer needs the ability to design systems for electrical, non-electrical, software, that relate to the operation of a facility in a hazardous area. There are multiple requirements based on the complexity of a facility. This requires that the design start with the objectives and consider the appropriate Ex Equipment that will be able to achieve the process and safety goals.

NOTE A designer may be part of a team in which individuals have different competencies necessary to complete the
 design of a system or installation.

#### 361 8.3.2 Examples of typical design tasks

- 362 Examples of typical design tasks include, but are not limited to:
- evaluation of local regulatory, legal and facility requirements for an installation in hazardous
  areas;
- selection of Ex Equipment and interconnecting systems based on the area classification
  using documents such as IEC 60079-14;
- selection and application of standards, owner specifications and legal requirements relevant
  to the systems being designed and the location;
- ensure ventilation issues considered during area classification are included in the design
  and installation documents;
- preparation of construction or installation drawings with supporting detail where required;

- 372 preparation of specifications for procurement; and
- preparation of, or participation in, the verification dossier to support future maintenance,
  inspection, and repair.

#### 375 8.3.3 Examples of evidence of design competence

- 376 Examples of design competence include, but are not limited to:
- interpretation and application of requirements from source documents such as functional
  specifications, area classification drawings;
- understanding of the area classification and environmental conditions on which to base the
  design of systems and selection equipment that are appropriate;
- demonstrating the practical skills necessary for the preparation and compilation of relevant
  design, procurement, installation, inspection, testing, and maintenance information and
  documentation for the applicable concepts of protection and systems involved;
- 384 identification of any ignition sources which shall be properly protected or controlled;
- understanding the general principles of explosion protection, relevant standards and Ex
  Equipment marking;
- 387 understanding the content of instruction manual and Ex Equipment certificates;
- understanding the specific techniques employed in the selection and erection of Ex
  Equipment.
- NOTE The design of systems or installations for hazardous areas typically requires prerequisite competence in other
  areas such as earthing, electrical systems and lightning protection.

#### 392 8.4 Installation

#### 393 8.4.1 General

Installation of the Ex Equipment includes verification of proper mounting, appropriate electrical
 and non-electrical interconnection and documentation of the installation while Ensuring the Ex
 Equipment specifications are appropriate and any Specific Conditions of Use are addressed.

Completion an installation can include selection of appropriate materials and tools required for the task.

#### 399 8.4.2 Examples of typical installation tasks

- Examples of typical installation tasks include, but are not limited to:
- 401 confirmation that Ex Equipment is per specification, or as ordered and is appropriate for the
  402 location, including the consideration of any Specific Conditions of Use;
- 403 selection and installation of various types of equipment not specified in the design that are
  404 required for the correct installation of Ex Equipment;
- 405 handling and installation of Ex Equipment;
- 406 interconnection of electrical systems, cable termination and the use of supports as required;
- 407 installation of equipment as per design drawings;
- 408 working safely in a hazardous area including hazard monitoring, evacuation procedures and
  409 the use of permit to work system or safe isolation procedures;

- 410 testing of installed cables/circuits to ensure safety where required (this can also be
  411 completed in the commissioning process); and
- 412 documenting the completion of installation as required.

#### 413 8.4.3 Examples of evidence of installation competence

- Installers need to demonstrate competence to the extent necessary to perform their tasks:
- 415 Examples of evidence of installation competence include, but are not limited to:
- 416 understanding of installation of and work with Ex Equipment;
- 417 understanding of the general principles of explosion protection concepts;
- 418 knowledge of ignition sources
- 419 understanding of the principles of Types of Protection, marking and appropriate areas of
  420 use;
- 421 understanding of the equipment installation requirements which could affect the protection
  422 concept;
- 423 correct use of instruction manuals, equipment certificates and installation documentation;
- 424 application of proper installation techniques and correctly select any additional materials
  425 when required to complete the task (such as cables, Cable Glands, cable trays, filters, spark
  426 arrestors,);
- 427 raising of technical queries (TQ) (when required) with the appropriate technical authority;
- 428 application of permit to work systems and comply with any limitations;
- 429 understanding of installation requirements in the applicable standards or documents;
- 430 understanding of inspection and maintenance requirements; and
- 431 correct use and operation of the appropriate testing equipment and consider any impact this
  432 may have in the hazardous area.

#### 433 8.5 Maintenance

#### 434 **8.5.1 General**

Maintenance personnel should have the knowledge and skills required for the relevant Types
 of Protection and types of Ex Equipment involved.

# 8.5.2 It is important that any maintenance procedures in hazardous areas ensure the explosion-protection features of the Ex Equipment involved is not compromised. Examples of typical maintenance tasks

- Examples of typical maintenance tasks include, but are not limited to:
- 441 implementation of maintenance programs and schedules, in relation to Ex Equipment and
  442 Specific Conditions of Use;
- 443 performance of testing as required, fault finding and corrective maintenance;
- ensuring that the features of each explosion-protection technique are included in the
  maintenance schedule and tasks;

- 446 ensuring the maintenance program considers any environmental conditions, such as
  447 corrosion, that could require an increased frequency in the maintenance of Ex Equipment;
- 448 recording of all maintenance conducted and results as appropriate;
- 449 working safely in a hazardous area including hazard monitoring, evacuation procedures and
  450 the use of permit to work system or safe isolation procedures; and
- 451 interpretation of equipment documentation in relation to maintenance, repair and 452 replacement.

#### 453 **8.5.3 Examples of evidence of maintenance competence**

- 454 Maintenance personnel need to provide evidence of their maintenance competence to the 455 extent necessary to perform their tasks.
- 456 Examples of evidence of maintenance competence include, but are not limited to:
- 457 an understanding of those aspects of equipment which affect the Types of Protection and
  458 the related markings;
- 459 an understanding of the content of Ex Equipment Certificates and Specific Conditions of
  460 Use;
- 461 an understanding and ability to read and assess engineering drawings and identify
  462 differences to the condition as installed;
- 463 understanding of the local regulatory requirements for installations;
- 464 ability to confirm that the Ex Equipment is fit for purpose, correctly installed and suitable for
  465 the location in which it is installed, has not deteriorated or is damaged and has not had any
  466 unauthorised modifications;
- 467 ability to identify Ex Equipment which has deteriorated or is damaged and is no longer in
  468 compliance with the Type(s) of Protection;
- detailed knowledge of the additional importance of permit to work systems and safe isolation
  in relation to explosion protection;
- 471 detailed knowledge of the techniques to be employed in the selection and installation of
  472 equipment referred to in this document;
- 473 ability to update or provide the information for the applicable maintenance record,
  474 verification dossier, facility drawings,
- 475 knowledge of the maintenance requirements in the applicable standards or documents for
  476 both electrical and non-electrical requirements;
- 477 knowledge of the overhaul and repair requirements in the applicable standards or
  478 documents for both electrical and non-electrical requirements;
- 479 knowledge of quality assurance, including the principles of auditing, documentation,
  480 traceability of measurement and instrument calibration; and
- 481 knowledge of the correct operation and use of the appropriate testing equipment for use in,
  482 or that may impact, the hazardous area;
- 483 an understanding of the application and limitations of permit to work systems.
- 484 NOTE The knowledge requirements can vary in respect of:

- 485 the relevant standards specific to legacy installations for example; classification / product / installation/
  486 inspection and maintenance.
- 487 types of installations including low voltage, high voltage, Types of Protection, engines,

#### 488 **8.6** Overhaul and repair activities within service facilities

#### 489 **8.6.1 General**

Users of Ex Equipment suitable for use in hazardous areas have a duty to ensure equipment
 remains in compliance with applicable regulations, which can include the need to ensure their
 equipment is overhauled, repaired and reclaimed and returned to serviceable condition by
 persons or organizations competent in the application of standards such as IEC 60079-19.

Overhaul and repair are typically conducted offsite or outside a hazardous area and therefore the requirements for individuals or organizations involved in those specific tasks need to be verified by the user.

Competence should apply to each Type of Protection and Ex Equipment type for which the person is involved. For example: it is possible for a person to be competent in the field of repair and overhaul of Ex "d" electric machines only and not be fully competent in repair of Ex "d" switchgear or Ex "e" electric machines.

The responsible person for overhaul and repair activities within the management organization, accepts responsibility and authority for ensuring that the overhauled/repaired equipment complies with the Ex Equipment Certificate or any change in status is agreed to by the user. The person so appointed should have a working knowledge of the appropriate explosion protection standards and an understanding of this document.

506 Repair operators work under the technical authority of the Responsible Person within the site 507 management system.

# 5088.6.2Examples of typical overhaul and repair tasks – Individual(s) responsible for509overhaul and repair

- 510 Examples of typical overhaul and repair tasks include, but are not limited to:
- explaining to user the status of the Ex Equipment after overhaul and repair and obtain
  acceptance of the resulting status before any repair is undertaken;
- 513 obtaining approval from the user on the scope of work involved in the repair or reclamation;
- confirming the Ex Equipment is in serviceable condition with sufficient verification of
  compliance and authorize application of the Ex repair label;
- 516 maintaining records such as Ex job records, Type of Protection standards, technical 517 specifications, schedule drawings, operation and maintenance manuals, spare parts list;
- 518 verification of the competence of repair operators periodically; and
- 519 participation in the Quality Management System review process.

# 5208.6.3Examples of evidence of overhaul and repair competence – Responsible Person521for overhaul and repair

- 522 Examples of overhaul and repair competence include, but are not limited to:
- 523 demonstration of the evidence of competence as detailed in 8.6.5;

- 524 demonstrating a working knowledge and understanding of the relevant standards in 525 explosion protection field;
- 526 demonstrating a practical understanding of explosion-protection principles and Types of 527 Protection;
- demonstrating an understanding and ability to read and assess engineering drawings and
  identify differences to the as-built condition;
- demonstrating an understanding of the local regulatory requirements for overhaul and repair
  applicable for equipment and for the location in which it is installed; and
- demonstrating a knowledge of quality assurance, including principles of traceability of
  measurement and instrument calibration.

#### **8.6.4** Examples of typical overhaul and repair tasks - Repair Operator

- 535 Examples of typical overhaul and repair tasks include, but are not limited to:
- identification of the relevant standards from the nameplate or documentation for the equipment and conduct visual inspection and electrical and non-electrical required tests;
- 538 communication to the responsible person the requirements to return equipment to 539 serviceable condition in accordance with the relevant standards;
- assessment of equipment condition and that it has not had any unauthorised modifications,
  completion of approved repairs and provision of inspection and test records, including
  traceability of instruments used and pass-fail criteria, to the Responsible Person for
  overhaul and repair; and
- when authorized by the Responsible Person for overhaul and repair, application of the repair
  label.

#### 546 8.6.5 Examples of evidence of competence - Repair Operator

- 547 Examples of overhaul and repair competence include, but are not limited to:
- understanding of the applicable principles of explosion protection, Types of Protection, the
  content of Ex Equipment Certificates and any Specific Conditions for Use;
- understanding of nameplate data and marking to accurately identify the relevant standards
  to be used in assessing equipment condition and conducting overhauls, repairs, and
  reclamations;
- ability to evaluate equipment to identify any unauthorised modifications, the equipment
  condition and any deterioration or damage which may affect the compliance with the Type
  of Protection;
- knowledge of the overhaul and repair requirements in the relevant standards or documents
  such as IEC 60079-19; and
- ability to update or provide the information for the applicable repair record, job report and
  Quality Management Systems (QMS) records.

#### 560 8.7 Inspection

#### 561 **8.7.1 General**

Inspection is the examination of an item or installation to determine the conformity to specific requirements.

#### **8.7.2 Examples of typical inspection tasks**

- 565 Examples of typical inspection tasks include, but are not limited to:
- Performance of detailed, close, or visual inspection to confirm compliance with the
  applicable standards, manufacturers' instructions, and installation requirements and that
  there is no deterioration of the equipment that could affect the Type of Protection;
- 569 conduct of testing as required according to Clause 8.10; and
- recording and retention of the results of all inspections including the extent, type and
  findings of an inspection and submit the report to management as required.

#### 572 8.7.3 Examples of evidence of inspection competence

- 573 Examples inspection competence include, but are not limited to:
- 574 ability to obtain the relevant information from the engineering drawings to conduct the 575 inspection;
- an understanding of those aspects of equipment design which affect the protection concept
  and ability to identify Ex Equipment which has deteriorated and is no longer in compliance
  with the Type of Protection concept;
- an understanding of the content of Ex Equipment Certificates and relevant parts of the
  applicable standard(s) and to identify that any Specific Conditions of Use are met;
- 581 understanding of the particular techniques to be employed in the selection and installation;
- 582 ability to identify differences between the drawings and the condition as installed;
- 583 an understanding of the local regulatory requirements for installations;
- knowledge of quality assurance, including the principles of auditing, documentation,
  traceability of measurement and instrument calibration;
- knowledge of the correct operation and use of the appropriate testing equipment for use in,
  or that can impact, the hazardous area;
- detailed knowledge of the application and limitations of permit to work systems and safe
  isolation in relation to explosion protection;
- ability to confirm the equipment is fit for purpose, correctly installed and suitable for the
  location in which it is installed, and there have not been any unauthorised modifications;
- understanding of the applicable principles of explosion protection, Types of Protection and
  marking;
- ability to accurately and clearly record any defect that has been found in such a manner as
  to ensure that the repairer can effectively plan and carry out an appropriate repair;
- knowledge of the inspection and installation requirements in the applicable standards or
  documents such as IEC 60079-14; and
- knowledge of the inspection requirements in the applicable standards or documents such
  as IEC 60079-17.

#### 600 8.8 Commissioning

#### 601 8.8.1 General

602 Commissioning involves activities undertaken to ensure the verification and functioning of 603 equipment and facilities forming a system or group of sub-systems, by demonstrating and 604 recording its conformance with design parameters, regulation and specified operational 605 requirements, to show that the system is safe and operable.

606 Commissioning can require a combination of some or all the skills including that of inspection, 607 testing, maintenance, and installation

These are some of the basic inspection and checks carried out to demonstrate that plant and equipment has been fabricated, constructed, and installed correctly as part of construction, precommissioning, and maintenance activities.

#### 611 8.8.2 Examples of typical commissioning tasks

- Examples of typical commissioning tasks include, but are not limited to:
- 613 testing as required according to 8.10;
- 614 installation and hook up of equipment;
- 615 insulation resistance testing of cables and Ex Equipment;
- 616 high voltage testing of cables where required;
- 617 cold loop checks (cables continuity tests);
- 618 performing equipment calibration;
- 619 performing no-load tests on rotating equipment;
- 620 energizing electrical switchgear;
- 621 relay testing and functional testing of electrical interlocks;
- 622 cause and effect logic testing;
- 623 load testing;
- functional testing of instrument loops from field devices to the Human Machine Interfaces
  and energised functional checks;
- 626 alignment of rotating equipment couplings;
- 627 ensuring guards are correctly secured;
- 628 ensuring lubrication levels are correct;
- ensuring no visible signs of leakage from pump or gearboxes seals; and
- 630 recording and retaining the results of checks and inspections.

#### 631 8.8.3 Examples of evidence of commissioning competence

- Examples of commissioning competence include, but are not limited to:
- Commissioning personnel should demonstrate their competency relevant to the Types of
  Protection or Ex Equipment involved. ;

- 635 understanding, application, and limitations of the permit to work systems; and
- 636 demonstrating a level of commissioning competency which is related to the tasks being
  637 performed.

#### 638 8.9 Facility Operation

#### 639 **8.9.1 General**

Individuals are responsible for the safe the operation of an industrial facility with hazardous
 areas. This includes but is not limited to the coordination of multiple roles, tasks, work
 requirements, emergency procedures and management reporting.

#### 643 8.9.2 Examples of typical facility operation tasks

- Examples of typical facility operation tasks include, but are not limited to:
- operating and monitoring control of equipment, processes, and areas of industrial facilities
  to maintain parameters within prescribed limits during normal and abnormal conditions;
- 647 initiation of appropriate action when parameters vary outside normal operating limits;
- managing approval of work, permit to work system or other control procedures of work
  conducted by others in the facility;
- 650 monitoring and approval of entry of personnel;
- 651 oversight of the movement, transport, storage of equipment and materials within the facility;
- 652 initiation, coordination, and execution of emergency response procedures;
- 653 status reporting to facility managers; and
- 654 review and approval of management of change requests on behalf of the operations
  655 department.

#### 656 8.9.3 Examples of evidence of facility operation competence

- Examples of facility operation competence include, but are not limited to:
- facility operation staff need to demonstrate their abilities which relate to their role and the
  exact nature of the facility:
- use of information sources to identify the hazardous area classification for a part of a facility
  and identify the potentially flammable materials that may be present;
- demonstrating the knowledge of the principles of hazardous area classification to identify
  what changes could impact the facility (example of changes: addition of enclosures, change
  of use of pipes, change of pump seal types, increased sample frequency, failure of
  ventilation, lack of cleanliness, leaking joints);
- showing sufficient understanding of the applicable hazardous area equipment marking to be
  able to establish in which areas equipment may be used, such as gas/dust group and
  temperature class confirm whether the equipment can be used in specific locations of a
  facility;
- identifying the suitability of personal, portable or transportable equipment to be used in
  various areas of a facility;
- ascertaining if Ex Equipment is suitable for continued operation (for example understand
  and report alarm status, integrity of enclosures, management of leaks, spills,);

- understanding the actions to take where equipment and process parameter restrictions are
  exceeded;
- 676 understanding emergency response procedures and how to perform required actions;
- 677 managing / monitoring work at the site to avoid ignitions of a potentially explosive
  678 atmosphere. This includes the ability to:
- a) assigning competent personnel appropriate to tasks;
- b) identifying actions at the site that could cause releases of potentially flammable /
  explosive materials / atmosphere and specify appropriate controls; This may include,
  but is not limited to:
- c) identifying actions and events that may cause ignition and specify appropriate controls;
- d) understanding the principal sources of ignition (these are identified in documents such as ISO 80079-36) along with the knowledge and experience to understand how these may occur in practice at the place of work;
- 687 NOTE Additional guidance can be found in other documents such as EN 1127-1
- e) originating, verifying, checking, monitoring or controlling measures whether implemented by self or others;
- 690 f) checking selection and use of tools and equipment for the task being performed;
- g) identifying means by which electrostatic charges may be generated and controlled in
  practice at the place of work (for example, clothing, PPE, splash filling, use of plastics,
  appropriate hoses, earthing of moveable pumps, pump trucks and persons identified in
  documents such as IEC TS 60079-32-1 and other relevant documents);
- 695 h) managing / undertaking portable gas testing, if appropriate, including an appreciation of 696 the limitations of this technique;
- i) identifying unacceptable levels of cleanliness in a dust environment, as appropriate; and
- i) confirming that the qualifications of the personnel working in a facility are appropriate
  for the assigned tasks.
- 700 8.10 Testing of installed Ex Equipment

#### 701 8.10.1 General

Where there is a requirement for lifecycle integrity testing there should be an understanding of the limitations that exist and the hazards that can be created by the execution of the tests. This is in addition to understanding the Ex Equipment being inspected, requirements for facilities with hazardous areas in relation to permit to work and clearances, hazard monitoring and evacuation procedures, and plant and electrical isolation.

#### 707 8.10.2 Examples of typical testing of installed Ex Equipment tasks

- Examples of typical testing of installed Ex Equipment include, but are not limited to:
- 709 planning for and conducting testing in a hazardous area:
- identifying the Occupational Health and Safety (OH&S) procedures to be followed;
- 711 determining if the area is safe for the tests to be carried out;
- defining the characteristics, suitability and limitations of the testing equipment being used;
- defining or identify the appropriate pass-fail criteria for each test procedure;

- documentation of results of the installation tests in a verification dossier; and
- 715 developing procedures and options for dealing with test results that show non-conformance.

#### 716 **8.10.3** Example of evidence of typical testing of installed equipment competence

- Examples of testing of installed equipment include, but are not limited to:
- understanding the aspects of commissioning, maintenance, and inspection; and
- ability to conduct testing, interpret, record results and report accordingly where corrective
  action is required for item such as cables, piping (corrosion), ventilation system testing,
  verification of the direction of machines.

#### 722 8.11 Responsibility for specific Ex compliance functions

#### 723 8.11.1 General

Organizations may appoint a specific person(s) as responsible for ensuring installations comply with Ex requirements and regulations. Compliance functions can include management, implementation, audit, and analysis.

NOTE 1 for example, IEC 60079-14 and IEC 60079-17 have historically used the terms "Responsible Person",
 "Operative" and "Technical Person with Executive Function" to describe specific tasks which can be addressed by
 the roles defined in this document.

NOTE 2 Certain tasks require different levels of knowledge, skills, and competencies to enable them to meet the
 requirements of the relevant standards and legal requirements required in the country of operation.

#### 732 8.11.2 Examples of typical compliance functions

- Examples of compliance functions include, but are not limited to:
- identification of the applicable legal requirements for safe operation of the facility;
- ensure an effective Safety Management System (SMS) is in place for the control of ignition
  sources;
- establishing an overview of the tasks necessary for Ex compliance;
- identification of and maintain the content requirements of the verification dossier where
  required;
- development, maintenance, and monitoring of an inspection methodology and strategy
  appropriate for the facility; and
- 742 monitoring of inspection reports, initiating and prioritizing any remedial actions.

#### 743 8.11.3 Examples of evidence of compliance function competence

- Examples of compliance function competence include, but are not limited to:
- 745 demonstration of knowledge of the applicable legal requirements for the jurisdiction
  746 involved;
- demonstration of a practical understanding of the requirements for Ex areas, explosion
  protection principles and installation, maintenance, and repair requirements;
- <sup>749</sup> demonstration of knowledge of risk evaluation and mitigation methodology;
- knowledge of the roles, responsibilities of all other (applicable to an Ex facility) tasks;
- demonstration of a general understanding of engineering and ability to read and assess
  engineering drawings; and

753 – demonstration of an ability to communicate effectively with plant and engineering
 754 management regarding equipment in hazardous areas issues.

#### 755 8.12 Management (accountable administration)

#### 756 **8.12.1 General**

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The term management is here used to define the person(s) or organization given accountability and responsibility on behalf of the owners to ensure that a facility is designed, built, commissioned, safely operated and fulfils all legal requirements.

Technical knowledge of the hazardous area operations in a facility is not a prerequisite requirement for management (accountable administration), however this does require they assign key role responsibilities to persons with executive functions with appropriate competence.

The management (accountable administration) is expected to read and act upon reports from persons with executive functions when critical safety issues or other important details are identified to protect persons and property where appropriate.

#### 767 8.12.2 Examples of typical management tasks

Examples of typical management (accountable administration) tasks include ensuring
 competence persons and systems are in place to address safety critical items, this includes but
 is not limited to;

- persons with knowledge of governing laws, directives and codes are in place in the
  organization and given responsibility to advise management on issues that may give rise to
  potential explosions at the facilities under management;
- all personnel engaged in activities that may affect the performance of a facility are aware of
  their roles, have the resources and time to execute these effectively and have sufficient
  knowledge and experience to undertake these while being able to avoid, mitigate, identify,
  or manage hazards. Best practice is to maintain evidence of:
- 778a) role descriptions / task definitions and verification that these have been779communicated to the individuals who hold them;
  - b) competence verification and ongoing training provision, including dates, training objectives, assessment criteria, attainment; and
- c) periodic staff assessment against defined roles, including feedback from staff.
- 783 competent persons are assigned to ensure;
- all codes and standards used in design, design modifications, installation, testing,
  commissioning, operation, maintenance are appropriate
- 786 consultants and contractors appointed have sufficient knowledge / experience;
  787 Procedures are in place to ensure evidence of this is provided;
- key facility documentation (for example area classification drawings, maintenance records, asset registers,) is current and an effective management of change procedure is implemented;
- inventory of flammable and combustible material used at a site is controlled to be
  appropriate for the actual throughput of the facility; Records of inventory / throughput
  are maintained;

- facility and equipment are operated and maintained appropriately; roles or positions 794 in the organization that manages the asset are specified such that all 795 accountabilities and responsibilities for all aspects of the management of avoidance 796 of explosions and management of emergency situations are covered and can be 797 traced; 798 up to date guides or procedures are available to staff for the tasks to be safely 799 carried out on explosion protected equipment; 800 records are kept of operational actions taken, work carried out and inspections 801 reports, including corrective actions required and remedial actions performed; 802 803 procedures are in place to identify, as far as is reasonably practical, where a potential unsafe condition that could give rise to an incident occurring and is 804 communicated to management; 805 806 any risk ranking procedures in place are appropriate and are formally recorded: effective procedures are in place to control work and personnel (including visitors) 807 entry at site; 808 emergency response procedures appropriate to potential events are in place and 809 proved to be effective by periodic drills or simulations; Records of which are 810 maintained: and 811 defines safe work procedures and authorization requirements (such as a permit to 812 work system in hazardous areas for the various levels of risk involved); 813 internal audit procedures to verify all the above are in place. Results of audits are recorded, 814 and correction action taken in a timely and appropriate manner. 815 8.12.3 816 Examples of evidence of management (accountable administration) competence 817
- Examples of management (accountable administration) competence include, but are not limited to:
- economic additional econom
- demonstration of ability to manage a team of persons experienced with hazardous areas
  and risk mitigation
- demonstration of knowledge of the roles, responsibilities of all other (applicable to an Ex
  facility) tasks.

#### 825 8.13 Procurement

#### 826 8.13.1 General

When procuring Ex Equipment or services (purchasing, inspection, installation, repair,) or when entering contractual agreements for services of the same, it is important to follow the Ex requirements of the facility.

Persons responsible for procurement should have the competence to understand, or obtain, the minimum information required to identify the type of Ex Equipment or services being requested. While it may not be critical for procurement to understand equipment construction requirements, they should be aware the impact of not following the specifications for Ex Equipment. Where an external provider is being evaluated to provide services, the competence of the external provider, including whether their staff has sufficient skills and experience to safely perform the tasks included in the contract, should be confirmed.

- Procurement should have the competence to understand, or obtain, the minimum information required to identify the type of Ex Equipment or services being requested;
- 839 While it may not be critical for procurement to understand equipment construction requirements, 840 they should be aware the impact of not following the specifications for Ex Equipment;
- Where an external provider is being evaluated to provide services, the competence of the external provider, including whether their staff has sufficient skills and experience to safely perform the tasks included in the contract, should be confirmed.
- NOTE; Where procurement is an automated function, the system data is typically reviewed by persons competent in
  Ex requirements.

#### 846 8.13.2 Examples of typical procurement tasks

- 847 Examples of procurement tasks include, but are not limited to:
- sourcing vendors and purchasing Ex Equipment based on performance specifications,
  design specifications, description of the product, Ex specifications, a list of acceptable
  manufacturers, or specific catalogue / part / model number, based on a request from
- 851 others; and
- where a vendor recommends alternatives or substitutions to the original request,
  procurement should consult with the originator of the request before purchasing;

#### 854 8.13.3 Examples of evidence of procurement competence

- Purchasing/procurement personnel should demonstrate a basic level of competency relevant to the Types of Protection or equipment involved.
- Examples of procurement competence include, but are not limited to:
- 858 completing basic explosion protection awareness training;
- demonstrating general awareness of the Ex requirements for the location(s) they are
  supporting in this role;
- demonstrating the ability to be able to identify equipment marking and certificates to be
  supplied with the equipment ordered;
- experience of working to procedures that enable compliance for procurement of Ex
  Equipment or services.

#### 865 8.14 Training instructors

#### 866 8.14.1 General

Persons involved with the education and training of individuals in developing the necessary skills to meet the competency requirements listed in 8.2 through 8.13 should be competent in the subject material they are dealing with.

- 870 8.14.2 Examples of typical training tasks
- 871 Examples of typical training tasks include, but are not limited to:
- 872 developing task specific training materials; and
- 873 presentation of training materials.
- 874 8.14.3 Examples of evidence of training competence
- 875 Examples of training competence include, but are not limited to:

- 876 demonstrating core competence in the subject matter assigned;
- providing evidence of competence to plan, organise and delivery the training curriculum;
  and
- error demonstrating instruction, communication, and presentation skills.

#### 880 8.15 Assessors of competence

#### 881 8.15.1 General

- Assessors should meet the core competence requirements (as applicable) to evaluate the competence of those identified in each role.
- The assessor can require qualifications for the role and should be appointed or contracted by management. A validation of their competence to conduct assessment may be through a peer or witness assessment process.

#### 887 8.15.2 Examples of typical assessor tasks

- 888 Examples of typical assessor tasks include, but are not limited to:
- 889 conducting a structured evaluation programme for the role involved;
- 890 formally recording the results of the assessment; and
- 891 evaluating the assessment to determine the pass/fail results.

#### 892 8.15.3 Examples of evidence of assessor competence

- 893 Examples of assessor competence include, but are not limited to:
- 894 demonstrating core competence in the subject matter assigned;
- 895 providing evidence of competence to conduct an impartial assessment; and
- 896 demonstrating an understanding of the assessment programme and methods assigned;
- 897 demonstrating communication skills.

#### 898 8.16 Other tasks

#### 899 8.16.1 General

Other tasks conducted within hazardous areas have the potential to compromise safety or create ignition sources. While personnel should be made aware of the possible hazards, an extensive evaluation of competency might not be required.

- 903 Other activities include, but are not limited to:
- 904 housekeeping, catering, paintings, carpentry, civil contracting and other similar activities;
- 405 tanker loading, material and equipment transfer, storage, logistics, machinery operation and
  406 similar activities.

#### 907 8.16.2 Example of evidence of other competence

An example of evidence of other competence would be completion of training or safety orientation appropriate to the facility.

910 NOTE Facility management can require further assessment such as successful completion of a test.

#### 911 9 Evaluation Assessment Criteria

#### 912 **9.1 General**

The pass-fail evaluation of the competence assessment system can vary by employer, facility, task or third-party verification, and assessment organization.

NOTE 1 The employer can define evaluation, test and pass-fail criteria that meets their specific task requirements.
 A third-party verification and assessment organization normally defines a pass-fail criterion based to meet their
 specific competency modules which typically have a broader scope than the employer.

Based on assigned tasks as indicated in Clause 6, Ex knowledge required is defined by the facility management or by national regulations.

It is recommended that users of this document adopt or develop several versions of the practical
 and written tests for each task or range of tasks. This process is recommended to facilitate
 compliance with the requirements of 9.2 and to avoid improprieties.

923 NOTE 2: Documents such as ISO/IEC 17024 can provide guidance for the Evaluation Assessment Criteria.

#### 924 9.2 Pass-Fail Criteria

The facility management may define or adopt the pass-fail criteria requirements that are most appropriate to their specific operations or the skill level for a certain task as opposed to defining a role.

NOTE If there is a need to repeat an assessment, it is common to allow an individual to repeat an assessment twice
 without evidence of additional training. The questions for each assessment are typically different.

#### 930 **10** Reassessment of competency evaluation

lt is important that competency continues to be maintained. It is recommended that the
 competency of individuals be re-evaluated periodically (typically within a period not exceeding
 5 years).

934 NOTE Several factors can affect the competency of an individual over time which can include knowledge 935 requirements from both internal and external influences. This can include changes in standards, industry practices 936 or technology, and a change in work role and responsibility, and maintenance of competence through practice.

937

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