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Control of hazardous energy on machinery – Specification

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Contents

	Page
Foreword	iii
0 Introduction	1
<i>Table 1 — Hazardous energy control</i>	2
1 Scope	3
2 Normative references	3
3 Terms and definitions	4
4 Risk assessment	5
5 Normal operation	6
5.1 Safeguarding	6
6 Isolation for maintenance operations	7
6.1 General	7
6.2 Identify types and isolation points for all hazardous energy	8
6.3 Disconnection of all hazardous energy sources	8
6.4 Locking off or lock-out	11
<i>Figure 1 — Multi-lock hasp shown on a pneumatic valve</i>	12
<i>Figure 2 — Example of a lock-off box</i>	12
6.5 Applying a suitable warning sign or tag-out	13
<i>Figure 3 — Examples of signs for mechanical, production and electrical work</i>	13
6.6 Release and/or block any stored energy	13
6.7 Verifying that the machine has been correctly de-energized	14
6.8 Re-energization of the machine	14
6.9 Handing over the work	15
6.10 Management and supervision of isolation	15
7 Maintenance and commissioning requiring the machine to be wholly or partially energized	15
7.1 General	15
7.2 Written risk assessment	15
<i>Table 2 — Indicative list of requirements of risk reduction measures</i>	16
7.3 Electrical maintenance on machinery	16
<i>Figure 4 — Deciding whether to work dead or live</i>	17
7.4 Pneumatic and hydraulic power systems	18
7.5 Re-energization of a machine requiring inspection and testing with whole or partial energization	18
7.6 Commissioning on machinery	19
8 Information, organizational controls, safe systems of work and training	20
8.1 General	20
8.2 Information	20
8.3 Organizational controls	20
<i>Figure 5 — Safe systems of work related to generic work activities</i>	21
8.4 Use of personal protective equipment (PPE)	21
8.5 Training and competence for the work activity	21
Annex A (informative) Tasks where the use of safety control systems to provide HEC might be allowable	23
Annex B (informative) Handing over work	24
<i>Table B.1 — Typical examples of hand over</i>	25
<i>Figure B.1 — Example of a communal safety lock issuing and handover log</i>	27
Annex C (informative) Example procedure for electrical work on low voltage equipment	28
<i>Table C.1 — Typical methods of isolation at low voltage</i>	29
<i>Figure C.1 — Example of a typical low voltage electrical permit to work</i>	32

Annex D	(informative) Work on or near live electrical equipment	33
	<i>Table D.1 — Example of a risk assessment to Work NEAR Live Conductors</i>	35
	<i>Table D.1 — Example of a risk assessment to Work NEAR Live Conductors</i>	36
Annex E	(informative) Example of a safe system of work for intrusive inspection as part of verification of leaks during pressure testing of mechanical power systems	37
Annex F	(informative) Guidance for work on an energized machine with physical hazards	40
Annex G	(informative) Human factors relevant to compliance with hazardous energy control procedures	41
Annex H	(informative) Procedures following electrical work on low voltage machine - return to service	42
	<i>Table H.1 — Return to service</i>	43
	Bibliography	44

Summary of pages

This document comprises a front cover, and inside front cover, pages i to iv, pages 1 to 45, an inside back cover and a back cover.

Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 29 February 2020. It was prepared by Technical Committee MCE/3, *Safeguarding of machinery*. A list of organizations represented on this committee can be obtained on request to its secretary.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is “shall”.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Requirements in this standard are drafted in accordance with *Rules for the structure and drafting of UK standards*, subclause **G.1.1**, which states, “Requirements should be expressed using wording such as: ‘When tested as described in [Annex A](#), the product shall ...’”. This means that only those products that are capable of passing the specified test will be deemed to conform to this standard.

Where websites and webpages have been cited, they are provided for ease of reference and are correct at the time of publication. The location of a webpage or website, or its contents, cannot be guaranteed.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

0 Introduction

This British Standard provides requirements and guidance to users of machinery on how to control hazardous energy on machines for safe working during all types of interaction.

[Table 1](#) identifies five potential types of interaction on a machine, two for normal operation and three for maintenance, based on the risk profile of each interaction.

During normal operation of machines, fixed and interlocked guards are commonly provided to prevent access to dangerous parts. Maintenance tasks (which could include setting, process changeover, cleaning, unblocking as well as planned and unplanned maintenance), might require alternative methods and controls to prevent injury, as the risks could well be different, requiring different risk reduction measures. Organizations need to risk assess how workers interact with a machine to determine which interventions can be carried out while relying on interlocking and which interventions require isolation.

NOTE [Table 1](#) is not intended to be hierarchical and there is always be the need to assess the element of risk involved for any given interaction and an adequate level of risk reduction applied.

[Table 1](#) contains references to the clauses which give appropriate requirements and guidance on risk reduction measures for each type of interaction.

It is important to include all forms of hazardous energy in any risk assessment, e.g. electrical, pneumatic, hydraulic, and energy due to inertia or gravity.

Table 1 — Hazardous energy control

	Type of interaction	Typical examples	Typical risk reduction measures (See Note 1)	Necessary documents (See Note 2)	References
During normal operation	Producing goods as described in the safe operating procedure (SOP).	Normal production.	Fixed or interlocked guarding.	SOP	Clause 5
	Working through an interlocked guard or protective device.	Clearing a jam, loading and unloading of material.	Safety controls to prevent unexpected start-up.	SOP	Clause 5 and Annex A
	Localized intervention or maintenance.	Changing a motor.	Local isolation/lock-out, tag-out (LOTO).	Safe system of work (SSoW).	Clause 6
During maintenance	Long-term maintenance.	Scheduled or unscheduled maintenance/cleaning.	Whole machine isolation; lock-out, tag-out (LOTO).	Maintenance procedures and SSoW.	Clause 6
	Whole machine cleaning.	Fault finding on live electrical equipment/teaching a robot/commissioning (see Note 3).	Partial isolation; hold to run controls; low energy; low voltage; low speed.	SSoW and permit to work (PtW).	Clause 7
<i>NOTE 1 The competence of those carrying out the work needs to be determined, as this can be an important contribution to the risk reduction measures (see 8.5).</i>					
<i>NOTE 2 The Management of Health and Safety at Work Regulations 1999 [1] require employers and self-employed persons to assess risks to workers and others who might be affected by their work or business. See also HSE publication INDG163 [2] which gives advice on these regulations.</i>					
<i>NOTE 3 Live fault finding and commissioning can be particularly high risk activities (see Clause 7). All activities could be applied during commissioning.</i>					

1 Scope

This British Standard provides requirements for the control of hazardous energy whilst work is being carried out on machines.

This British Standard includes requirements for machinery in relation to electrical and mechanical hazards (i.e. moving parts, or parts that could move).

NOTE 1 For requirements for other hazards, see, for example, BS EN ISO 4413 and BS EN ISO 4414, which provide guidance on hydraulic and pneumatic systems.

NOTE 2 For guidance on controlling electrical hazards, see The Electricity at Work Regulations 1989 (EWR) [3] and associated guidance HSR 25 "The Electricity at Work Regulations 1989 Guidance on Regulations" [4] and HSG85 "Electricity at work safe working practices" [5].

This British Standard also provides requirements for fixed equipment, such as motors and pumps fed via plug and socket-outlets.

This British Standard does not apply to:

- a) machines fed at high voltage;

NOTE 3 High voltage is defined in BS 7671 as above 1 000 volts A.C. or 1 500 volts D.C.

- b) material handling vehicles (e.g. forklifts, pallet trucks), rider operated vehicles, construction plant machinery, mobile elevated working platforms or road vehicles;

- c) transportable or portable work machine (including powered hand tools), although the basic principles can often be applied; and

- d) process plant equipment.

NOTE 4 For general guidance on isolation of process equipment, see HSG253 [6].

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes provisions of this document¹⁾. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS EN 62061, *Safety of machinery — Functional safety of safety-related electrical, electronic and programmable electronic control systems*

BS EN ISO 7010, *Graphical symbols — Safety colours and safety signs — Registered safety signs*

BS EN ISO 12100, *Safety of machinery — General principles for design — Risk assessment and risk reduction*

BS EN ISO 13732-1, *Ergonomics of the thermal environment — Methods for the assessment of human responses to contact with surfaces — Part 1: Hot surfaces*

BS EN ISO 13732-3, *Ergonomics of the thermal environment — Methods for the assessment of human responses to contact with surfaces — Part 3: Cold surfaces*

BS EN ISO 13849-1, *Safety of machinery — Safety related parts of control systems — Part 1: General principles for design*

BS EN ISO 13855, *Safety of machinery — Positioning of safeguards with respect to the approach speeds of parts of the human body*

¹⁾ Documents that are referred to solely in an informative manner are listed in the Bibliography.