

GROWING THE SUPPLY CHAIN FOR THE UK ELECTRICITY SECTOR

BEAMA QUARTERLY NET ZERO MARKET PULSE

Growing the supply chain for the UK Electricity Sector

This quarterly review is developed and published by BEAMA as the representative trade association for energy infrastructure and systems.

Setting the conditions for investment in our sector and supply chain for electrical products in the UK is an essential step in ensuring we can deliver the UK's Net Zero targets. Noting the Government's 2030 target to decarbonise our power sector, pressure is now mounting to ensure we can build capacity across the UK supply chain and ensure cost effective delivery for the UK's energy transition. There is significant scope for growth and the creation of jobs in the evolving low carbon industrial sector. This report is aimed at providing a measure for how we are delivering against known targets and if we are on track to achieve the growth needed.





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Introducing BEAMA and the Opportunities Through Electrification

The trade association for energy infrastructure & systems, BEAMA is the UK manufacturing representative body for the electrotechnical sector, providing leadership, expertise and independent influence in the areas of product safety, performance, energy efficiency, digitalisation and sustainability. Our activities span a broad spectrum of technology groups, from energy networks through to electrical infrastructure and service technologies in the built environment.



#ACCELERATING
ELECTRIFICATION

Accelerating electrification is a fantastic opportunity for supply chain investment, directly impacting UK GDP and job creation. Currently our sector represents a turnover of £14bn with an additional £5bn of exports¹, employing 90,000 skilled workers and has the potential to address a £1tr global market opportunity². This is estimated to lead to 400,000 new jobs by 2050 across multiple disciplines but this will only be realised if we:

- **Build consistency and fairness in policy and regulation.**
- **Consider the wider electrification technology potential for the built environment.**
- **Accelerate investment in critical network and built environment infrastructure through regulatory and policy interventions.**
- **Address the 'spark gap' created by the imbalance of affordability between gas and electricity pricing.**

1 [Source: ONS](#)

2 [Source: ONS](#)

Our members





#ACCELERATING ELECTRIFICATION





Yselkla Farmer
CEO
BEAMA

Foreword

Investment in supply chains will be a determining factor in the UK's ability to efficiently deliver on our climate targets. We know investment in our electricity system will be unprecedented as we electrify transport and heat and move to renewable generation. For some BEAMA sectors this could mean scaling up their production to 10 times³ what it is today, and with that comes great opportunities for the UK economy. The investment requires profound changes to the way we plan, manage and design our energy system, we need to invest ahead of need and share information and data across the supply chain to ensure sound investment decisions that will drive electrification and the delivery of UK climate targets.

BEAMA has been analysing trends in our market closely for over 2 decades, and we know our manufacturing sector well. This helped us manage material and component shortages throughout COVID and our supply chain has continued to ensure supply to the UK energy sector despite long lead times and dramatic fluctuations in the cost of

shipping, raw materials and more. We are confident in the strength of our supply chain today, but to transition to the level of demand we know to expect is new territory for us all and will require investment at home and abroad to secure capacity in the supply chain for the UK energy market. We see discussions about this ongoing in other countries around the world and the UK is one of many key energy markets with huge potential to grow. This will however place increasing demand on key raw materials and components.

We therefore want to start sharing more of our knowledge of the electrical manufacturing supply chain, and bringing this together with known statistics from other sources, including Office for National Statistics (ONS), Ofgem, DESNZ, ESO, to get a clearer idea of how we are performing against projected take up in Electric Vehicles, Heat Pumps, connections of solar and wind, take up of flexibility contracts and smart meter rollout, as well as close analysis of skills and employment needs for the industry. Our aim is that this quarterly report can provide a measure of success, a platform to share data that is publicly available and create discussion around how we can improve delivery. Importantly for BEAMA this is about providing a clearer trajectory for the overall energy transition that companies than plan and make decisions on investments against.

³ [BEAMA, Energy Systems Catapult, Growing a supply chain for a net zero energy system, March 2022](#)

UK manufacturers want to invest, the UK is a good place to do business, but compared to other markets the future is still unclear. We lack the market drivers for electrification and Net Zero.

BEAMA members can't invest without stronger market signals. Working with our new Labour Government we want to get back in the race to Net Zero.

This first issue of our Market Pulse is a snapshot of a larger body of work, and the start of a long journey as we hope to work closely with Government and other key stakeholders including utilities to analyse our market data and build up the information we can share. Behind this report sits a market dashboard we have created for BEAMA and our members, housing all publicly available statistics on the energy market transition as we seek to gain as much clarity as possible and drive an evidence lead policy and regulatory framework in the UK.

There is a lot of data we have that can help us understand what is needed from the market today. The Future Energy Scenarios National Grid ESO database⁴ is an important resource in setting the benchmark for successful delivery but data on delivery is still patchy, and in some areas we are unable able to confidently analyse progress without more complete datasets and monitoring. We comment on this in places in the report but will pick this up in more detail with Government and stakeholders going forward as we develop this work.

What we hear from our members is they want to invest, the UK is a good place to do business, but compared to other markets the future is unclear, there is little certainty, and we lack clear market drivers for electrification and Net Zero overall that would incentivise customers to engage in this market.

Our members simply can't invest without stronger market signals. We want to turn the tide on this and working with our new Labour Government get us back in the race to Net Zero and secure investment in the UK supply chain.

⁴ [Future Energy Scenarios \(FES\) | ESO \(nationalgrideso.com\)](#)



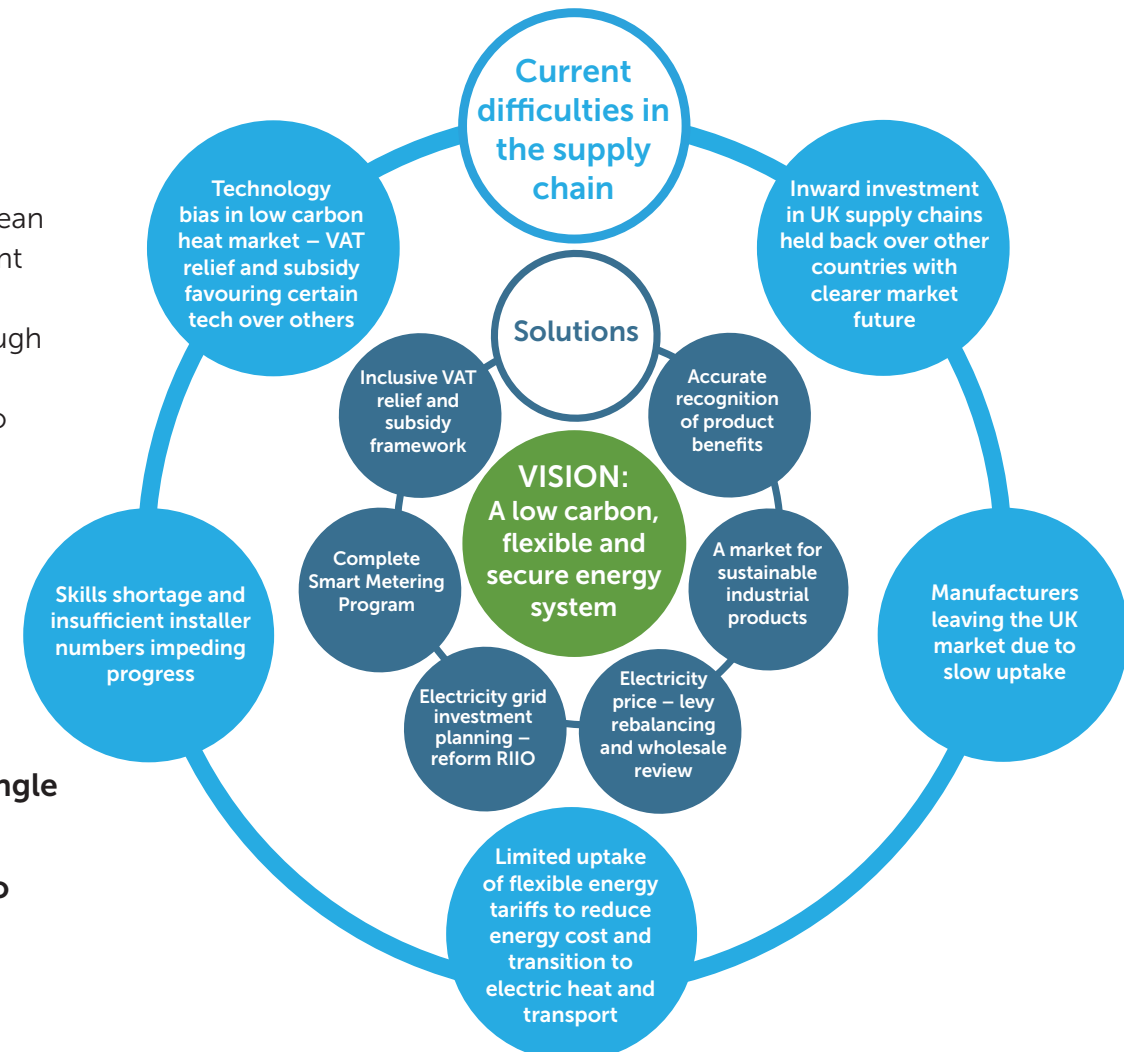
Policy Context

BEAMA's vision is for a low carbon, flexible and secure energy system in the UK. Government policy aims reflect a general sharing of this vision, and the Climate Change Committee's publications demonstrate its importance in mitigating climate change with the UK in a leadership role.

Accelerating electrification will be essential in the delivery of Labour's Clean Power by 2030 target, and this will be dependent on adequate investment in supply chains. BEAMA also recognises the benefits to industry and the wider economy from accelerating progress to our Net Zero targets through electrification, but to date the policy package has not been sufficient to improve the trajectory enough to give our industry greater confidence to invest. This is reflected by reports from our members that:

- **Other countries are more attractive for investment.**
- **In some markets manufacturers are leaving the UK due to slow uptake of Net Zero-enabling technologies.**
- **Skills shortages are impeding capacity to deploy products.**
- **In the heat market not all Net Zero-enabling technologies receive policy support and there is too much focus on a single electrification solution.**
- **Uptake of flexible energy tariffs, which allow consumers to maximise returns on investment, is too limited.**

- **There are a number of active policy barriers – both regulatory and fiscal – that are holding back the heat electrification market through market distortion.**



Given that policy and regulation is often cited as the number one influence on investment decisions made by our members, it is clear that more needs to be done. Our Market Pulse offers an important piece not only of insight but also scrutiny, and adds a greater robustness to our appraisal of policy, allowing others to also see what more they can contribute to the Net Zero transition and industrial growth.

The coalescing of industry around positive action since the Net Zero target was set by Government in 2019 was significant, so we know that targets can help. Ambitions on zero emission vehicles, clean power and warm homes are politically somewhat risky so commitment to these by the new Government should not be underappreciated. However, we aim to help policymakers better understand progress and the additional measures that can help to achieve these. We welcome the establishment of new institutions like Mission Control and Great British Energy to bring more coherence to policymaking and momentum to progress, and hope to fully engage with key decision makers.

Deliverability is all important. We cannot expect to suddenly turn on the tap a day before a target's deadline, especially when it can often take 7 years for a manufacturing business to build a new factory. We therefore hope to see steadily improving trends of network deployment, smart meter installations and EV charging capacity growth, as well a paradigm shift towards consistent retrofitting of buildings to be ready for low carbon heat. Our surveys show that our industry intends to invest, but that the extent of this is not yet transformational, capacity is not being maximised and optimism remains cautious. Concerted measures to accelerate electrification still have time to make significant improvements before 2030, but only if we understand the current trajectory and act quickly to improve it.



Growing the Supply Chain for a Net Zero Energy System

The 6th Carbon Budget necessitates early action, BEAMA and Energy Systems Catapult evidence demonstrates the Labour's Clean Energy by 2030 Mission is the right way to go.

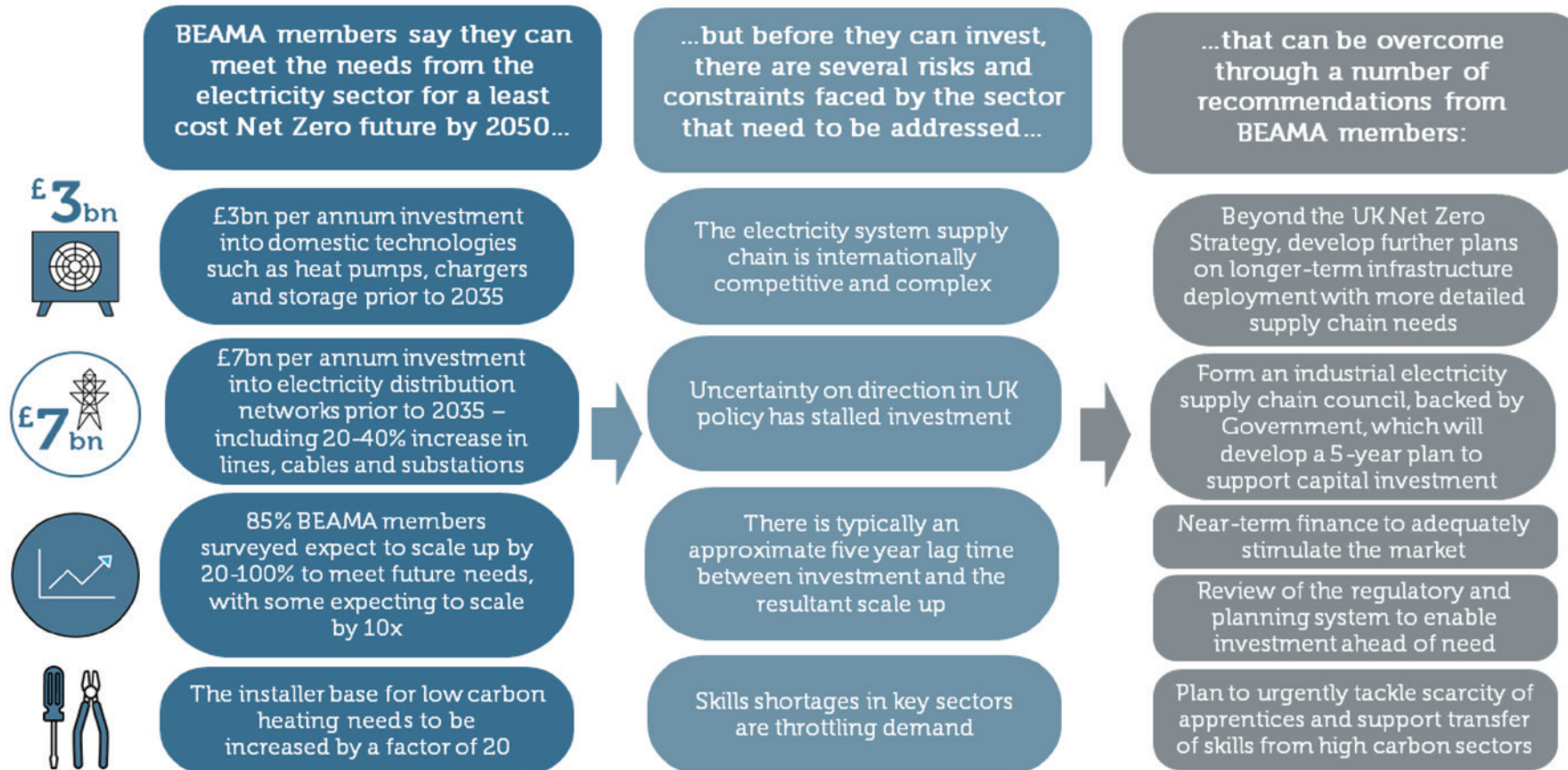
BEAMA conducted work with the Energy Systems Catapult in 2022 which was the first of its kind to understand what the future capacity requirements would look like for the Supply Chain in delivering the UK's energy transformation. The results were profound and clearly demonstrated the unprecedented demand that will be placed on the supply chain and the opportunity we have in building capacity in the UK. Many of the barriers to investment identified in this work are still relevant today.

Our findings demonstrated clearly the 6th Carbon Budget necessitates early action and the next 5 -10 years will be a crucial period of investment in manufacturing capacity for electrical products to support the energy transformation. We can therefore provide evidence that Labour's Clean Energy by 2030 Mission is absolutely the right way to go and we are publishing this work to support our contribution to Mission Control.

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Project Overview



**Business optimism bounced back to above the 5 year average in 2024.
Electricity networks sector seeing signs of growth**

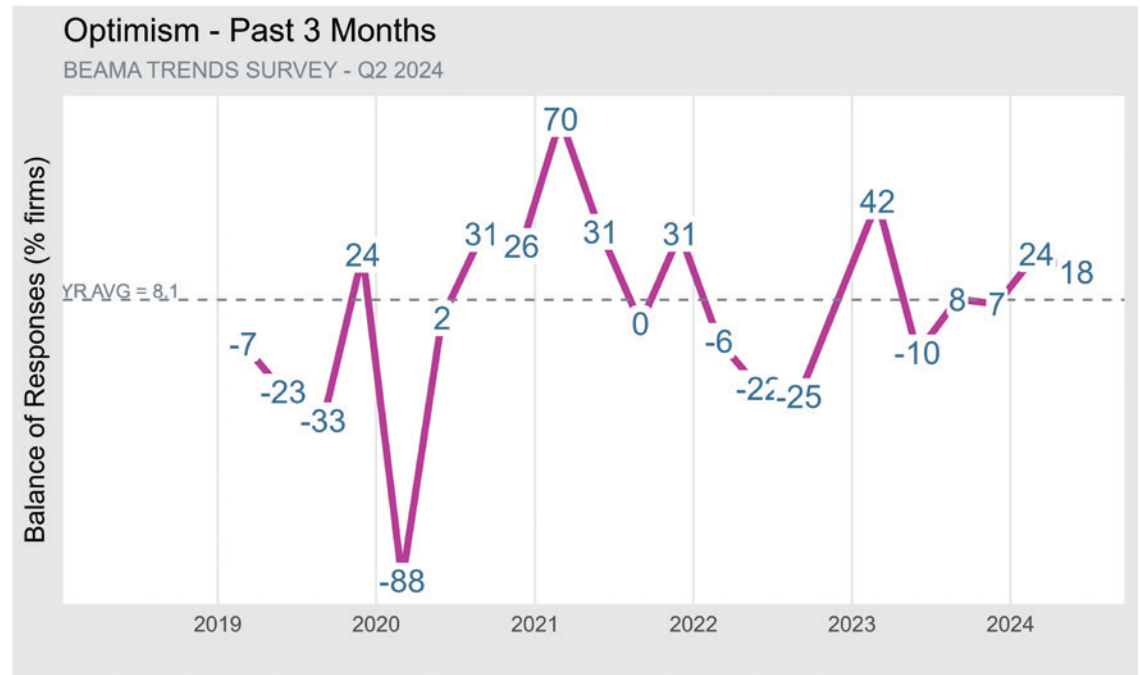
Are you more, or less optimistic than you were 3 months ago about the general business situation in your industry?

BEAMA tracks the business optimism of members. After some low points during 2022 and 2023, optimism bounced back to above the 5 year average in 2024. Optimism remains positive.

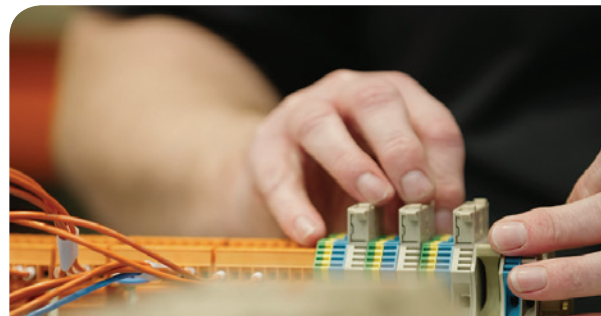
There is a split in comments between members operating in the electricity networks sector, who are seeing signs of growth and those in the construction sector who are seeing less positive prospects.

It is important to note that despite what appears to be an upward trajectory of optimism, and the later reported investment confidence indicator, the signals are way behind where we would expect them to be in a period when we should be heavily investing in the energy market transition. Although the survey coincided with the run-in to the General Election, it was clear that change was ahead and the manifestos were very clear.

Our conclusion is that there is much work to be done to boost confidence generally through the provision of a clearer and more detailed framework and implementation timeline for GB Energy and aligned infrastructure policy; scope and timelines for the Warm Homes Scheme with a firm target for delivery; and an urgent review of other areas including building equity into VAT relief and fiscal subsidies for heat electrification along with a commitment to roll out the Future Homes Standard within intended timeframes.



Source: BEAMA

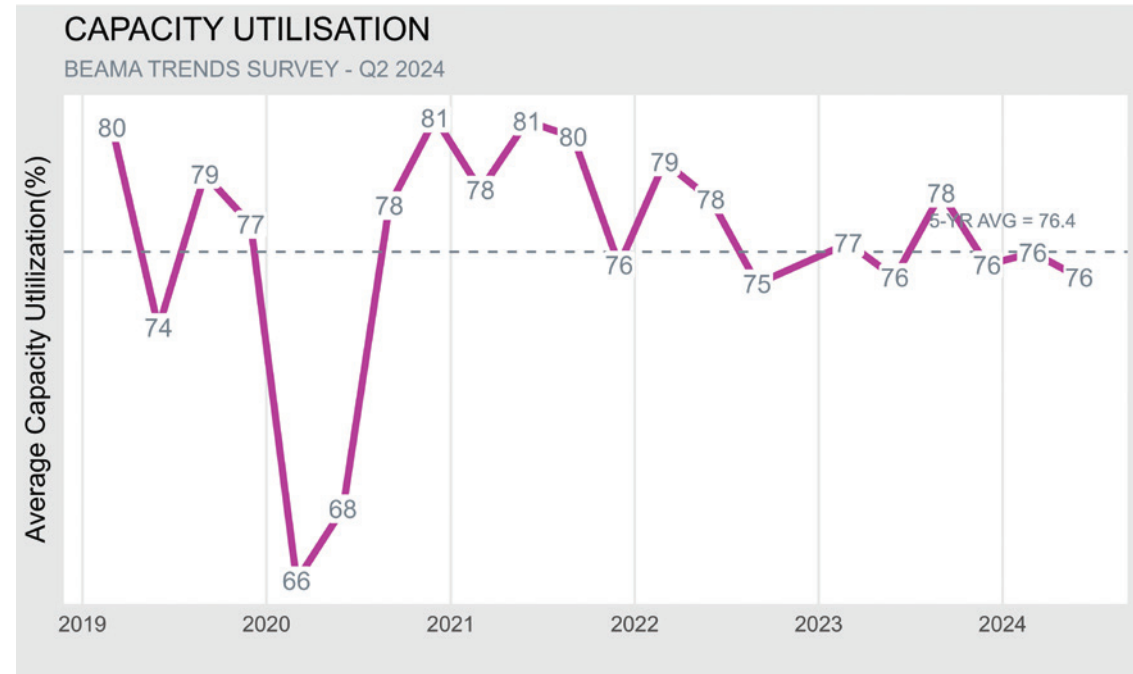


Average capacity utilisation edged lower below 5-year average, while some parts of the supply chain for electricity networks report operating at full capacity

What is your estimate of the current level of capacity utilisation?

This asks BEAMA members the extent of their manufacturing capacity that is fully utilised, i.e. what scope there would be to increase production in the event of new orders arriving.

Capacity utilisation edged a little lower, fractionally below the 5-year average. This is extremely interesting as a number of sectors are facing high levels of demand and most (91%) members reporting do not reserve capacity for demand fluctuations. While members in some sectors, such as electricity networks infrastructure, anecdotally report full use of capacity, it appears that others are experiencing weaker levels of demand.



Source: BEAMA

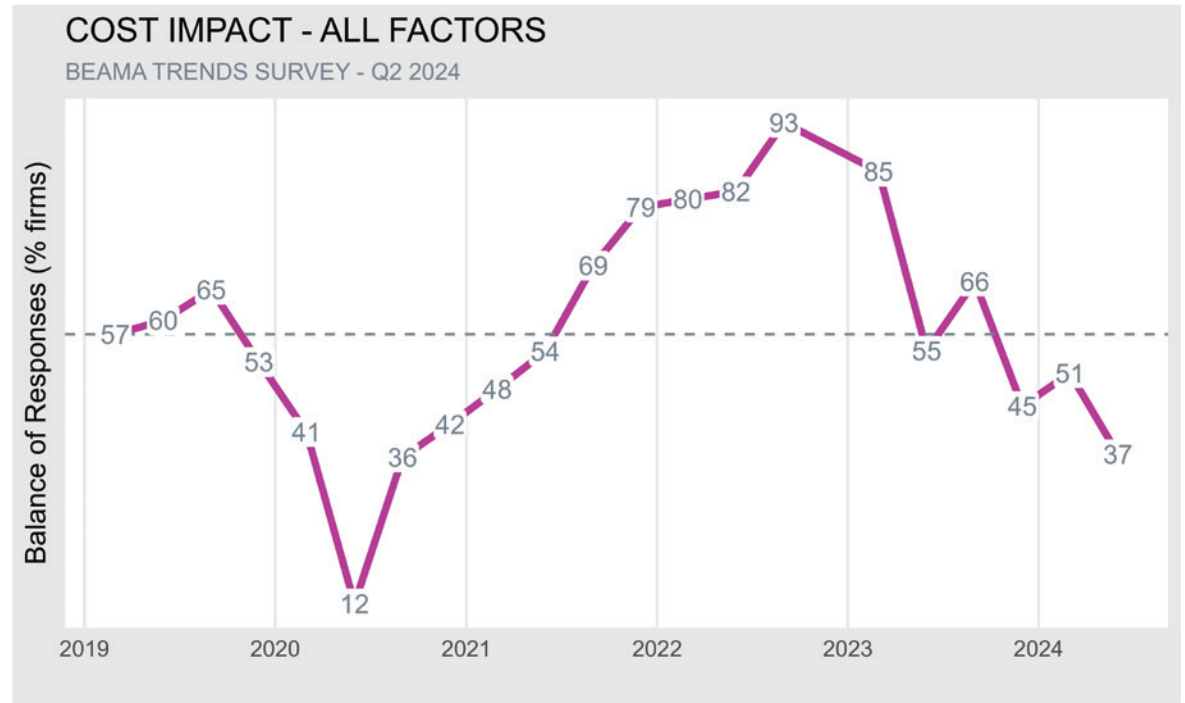


Unit costs hit a 4-year low

How have unit costs during the current quarter changed compared with the past 3 months?

Unit costs – the expenditure incurred by a company to produce, store, and sell one unit of a particular product or service, can include raw materials, components, labour, energy, logistics, transport.

Unit costs hit a 4-year low, having been the most significant issue reported by members for 2022 and 2023. Although a few members reported ongoing concerns on prices of metals and semiconductors, the impact of unit costs on businesses has diminished greatly. Energy, shipping and labour costs are now reported as having a greater impact than materials.



Source: BEAMA

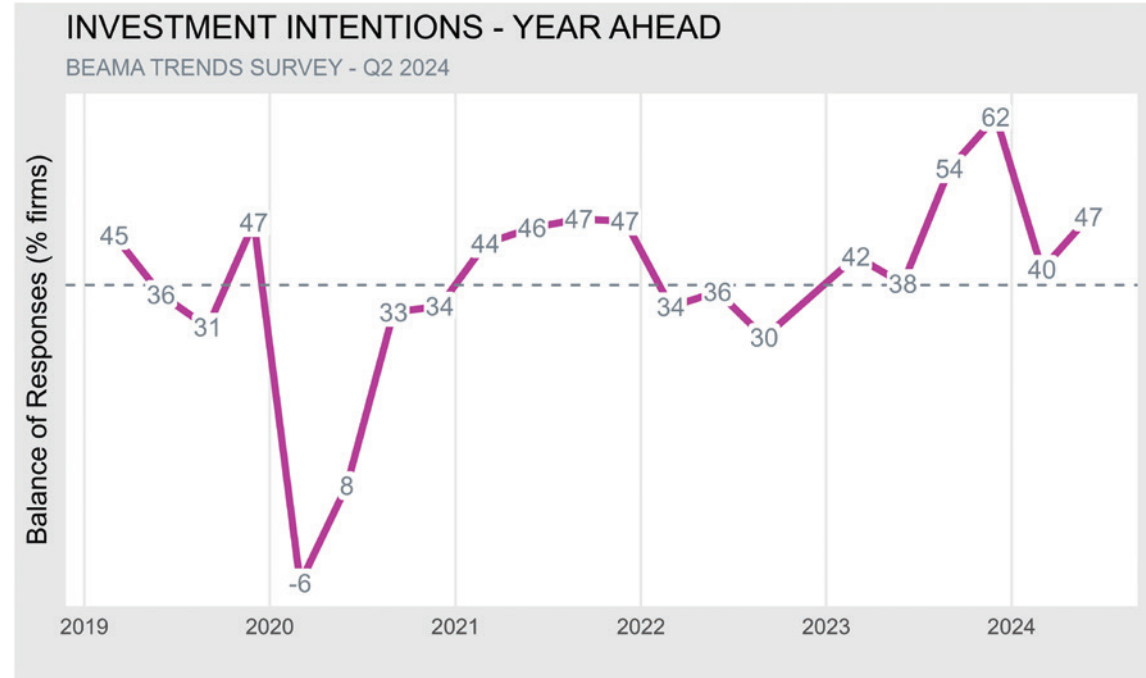


Modest increase in investment intentions across the sector does not reflect electrification needs for the UK. Greater certainty of the future market will lead to increased investment.

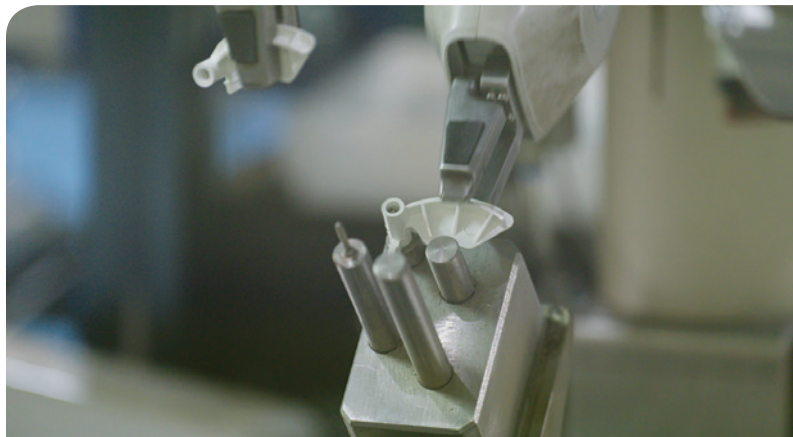
How has your capital investment changed during the past 12 months?

Tracking BEAMA members' intentions for investment in their UK businesses.

There was a modest increase in overall investment intentions in Q2 2024 compared to Q1 but this is still considerably lower than Q3 and Q4 2023. Given the scale of increased investment that will be required for electrification and meeting Net Zero commitments, it is surprising that there is not a greater ramp-up. As stated previously, this supports anecdotal reports from members that far greater certainty of demand is required, either from government-led investment at infrastructure level or from builders and consumers for end-use products.



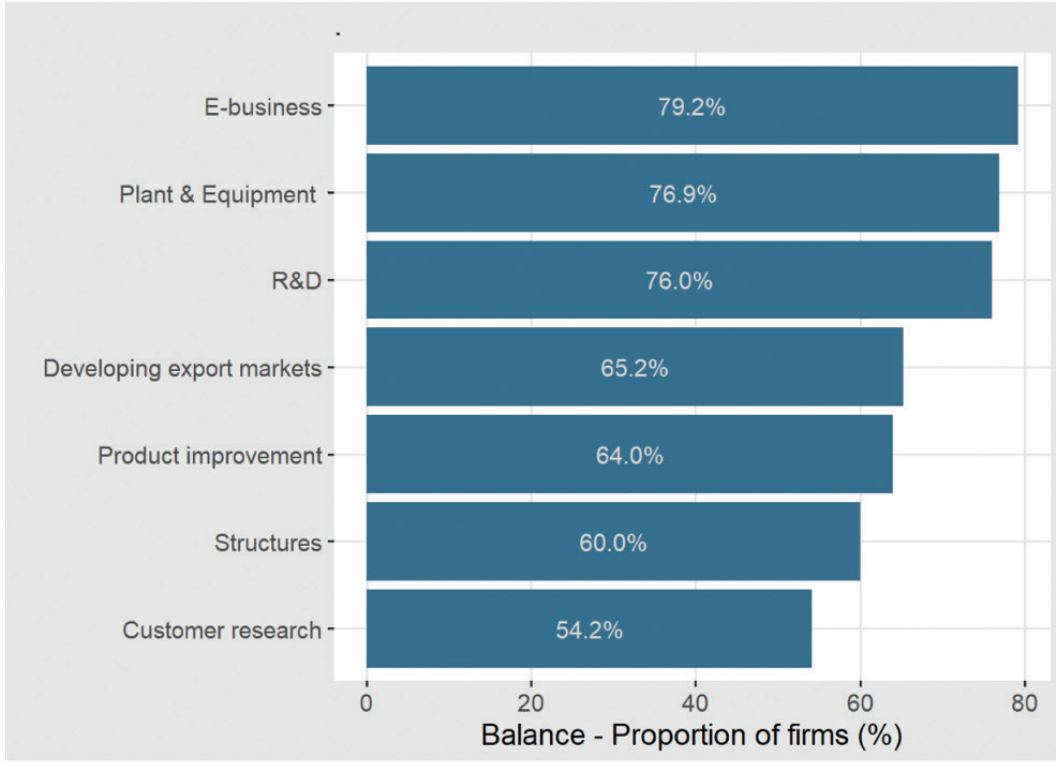
Source: BEAMA



How do you expect your capital investment to change during the next 5 years in the following areas?

BEAMA members report universal plans to maintain or increase investment over the next 5 years in all areas surveyed, the top 3 areas being e-business, plant & equipment and research & development.

It is important to bear in mind that research and development has typically long lead times of 18 months to 3 years.



Source: BEAMA

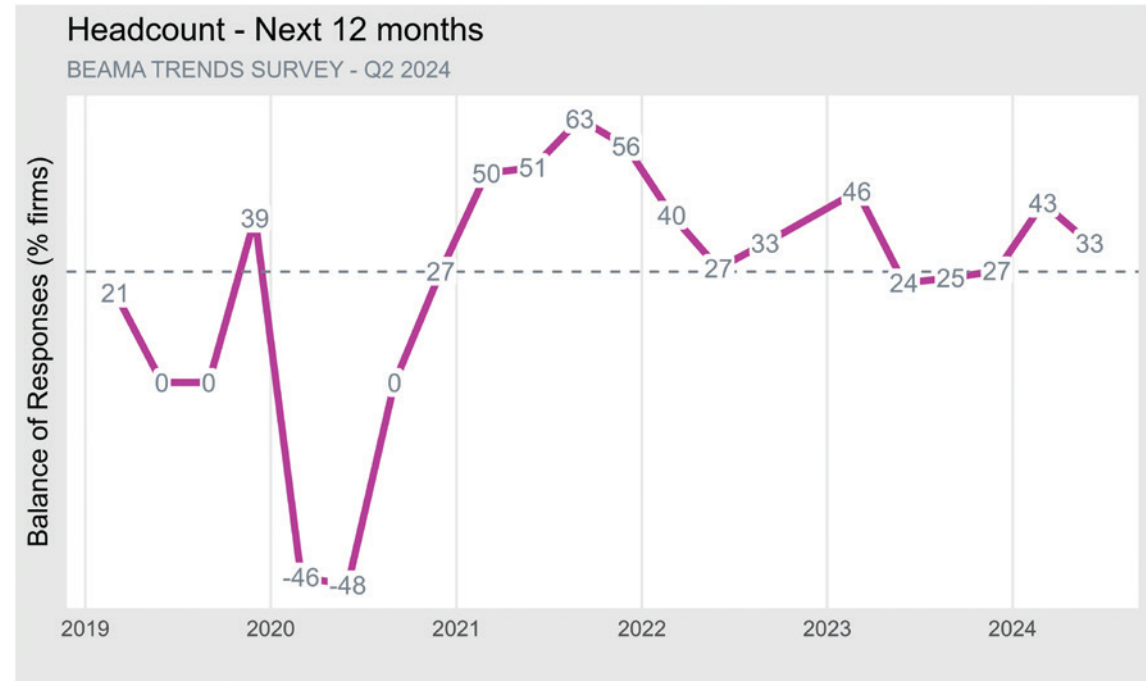


50% of BEAMA members report an intention to increase number of employees, but challenges in filling vacancies remain. This is cited as one of the key barriers to future investment in UK supply chains.

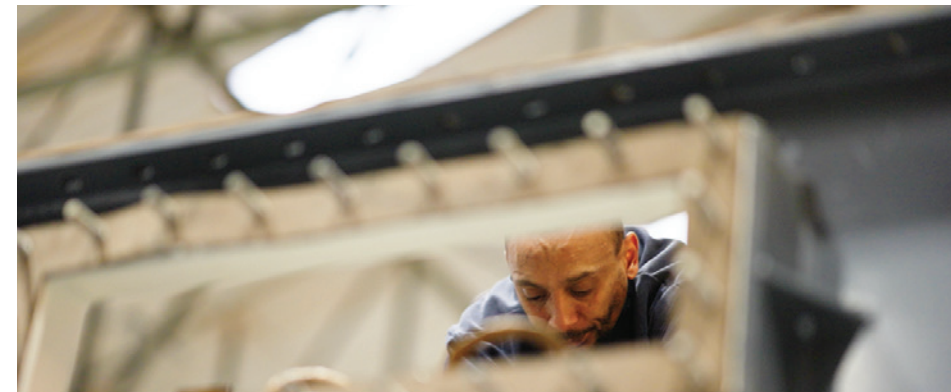
On balance there was a slight decrease in hiring intentions for the next 12 months from the previous quarter, but they remained positive. Nearly 50% of BEAMA members reporting stated an intention to increase numbers of employees.

Challenges in filling vacancies were reported, with some categories taking over 6 months to recruit. Difficulties in sourcing qualified engineers were reported along with sales and marketing staff. Reference was made to problems finding locally based staff.

We know skills and available workforce is cited as one of the key future barriers to investment in the UK, and therefore metrics on measuring this across the supply chain remains a priority for BEAMA.



Source: BEAMA



HEAT PUMP INSTALLATIONS

We need to increase low carbon electric heat deployment by 16 times the current rate to hit 2030 target. We can fill the spark gap through electricity price rebalancing and opening the market to the full range of electric heating products as well as heat pumps.

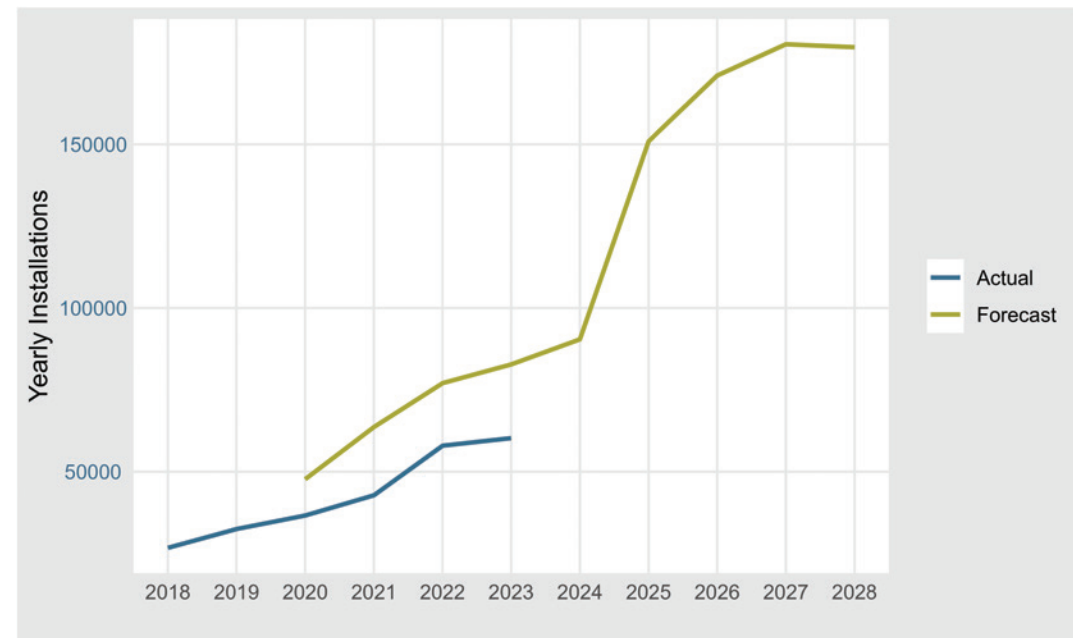
Actual installations reported by the [Heat Pump Association](#)

This indicates that we need to increase heat pump take up by 16 times current delivery rates to hit 2030 targets.

To achieve this the UK will need to:

- Address the spark gap, i.e. the excessively high price of electricity compared to gas.
- Address the shortage of heat pump installers – currently 3-4k trained installers while we need to train the same number each year until 2028.
- Simplify installation challenges, such as the restrictive permitted development rights, the lack of appreciation for heat pumps in Energy Performance Certificates (EPCs).
- Issues with the uptake of heat pumps include the currently high upfront costs of a heat pump system relative to a fossil-fuelled heating system.
- Improve incentives for consumers to install heat pumps given the high upfront costs compared to fossil fuel heating, e.g. a reduction in council tax.

- Tackle the disinformation put out in the media to create distrust in heat pump efficacy.
- Remove the myopic approach to heat electrification which discounts many thermal storage technologies and focuses on a single technology solution.



Source: HPA/ OFGEM (FES forecast)



Through expanding the 'basket of heat electrification' measures, Government can offer light touch entry points for installers on their journey towards electrification and address the 20% non heat pump dwellings, and beyond.

SMART METER INSTALLATIONS

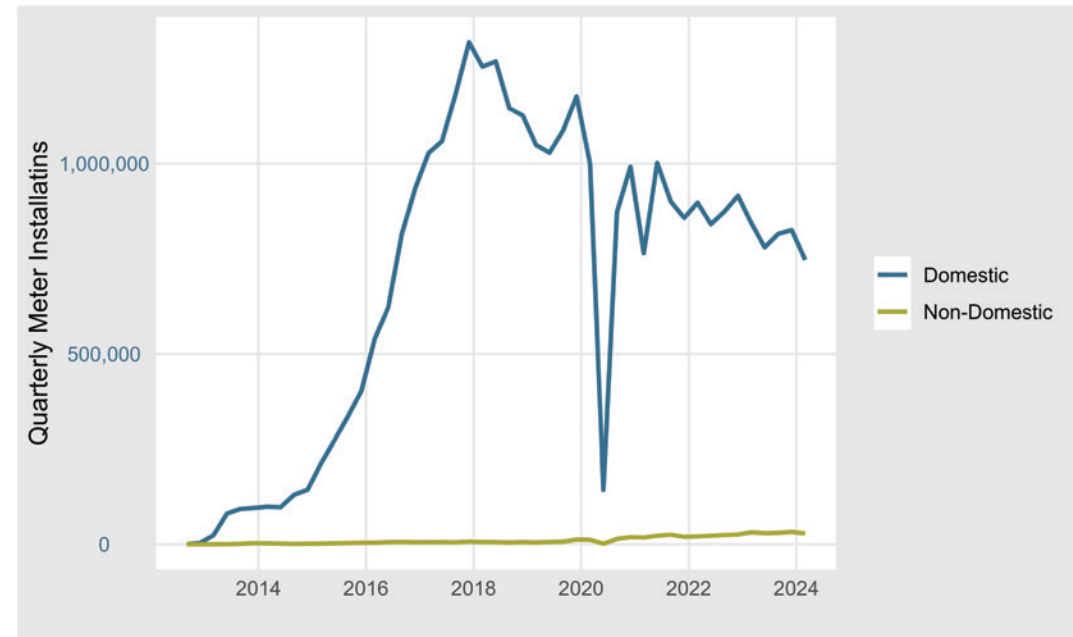
We are 11 years away from having a complete smart metering system to support a smart flexible energy system in the UK. This will not enable us to meet our Net Zero targets.

Manufacturers leave UK market due to slow down in smart meter deployment.

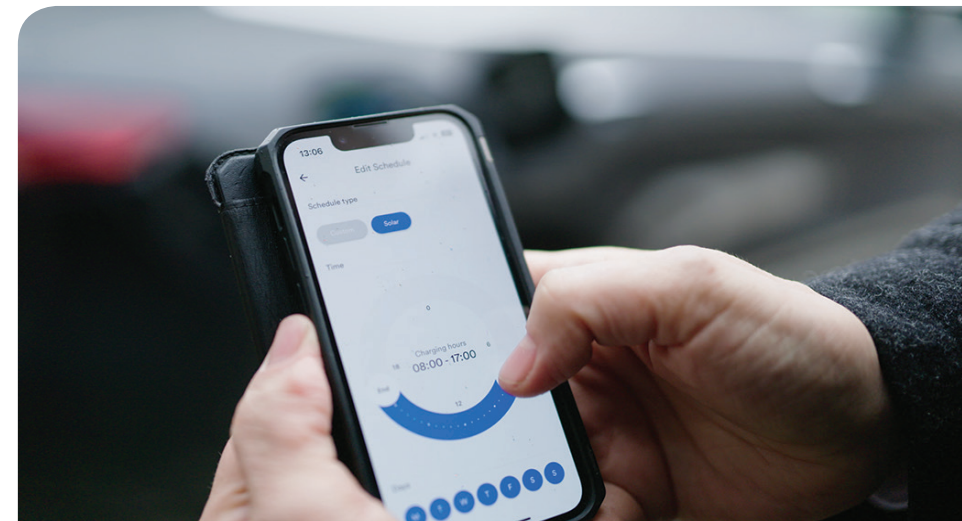
The market is currently operating 1 million units per annum below expected levels.

This is approximately 25% down on what the supply chain has been told to expect and as a result we are seeing a number of companies withdraw from the UK market entirely. There are currently only a handful of manufacturers active in supplying domestic electricity smart meters. The pressures of making a highly complex product which is entirely bespoke to Great Britain, at a commoditised price, is driving long-established manufacturers out of the market.

Based on the current trajectory and rate of installations it would take approximately another 7 years to complete the rollout, factoring in additional SMETS1 meters that will need replacing to be compatible with 4G we are likely to be 11 years away from having a robust smart metering system that would support a smart flexible energy system in the UK. This will not enable the UK to meet our Net Zero targets.



Source: DESNZ

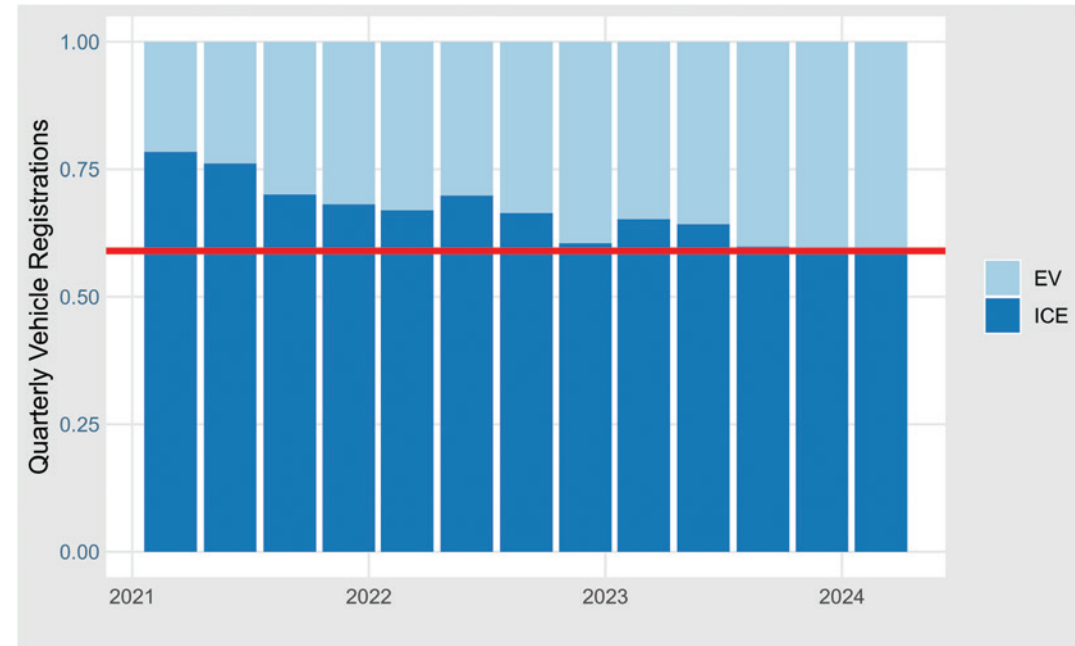


VEHICLE REGISTRATIONS – ICE VS EV

Market incentives for Electric Vehicle Uptake continue to hold up the market. The rate of take up is still not fast enough.

The proportion of Electric Vehicles sold in comparison to Internal Combustion Engines continues to increase, albeit at a slower pace than would be expected.

The maintenance and improvement of incentives to purchase EVs is therefore essential to maintain growth in the market, linked to increased provision of EV charging infrastructure.



Source: SMMT

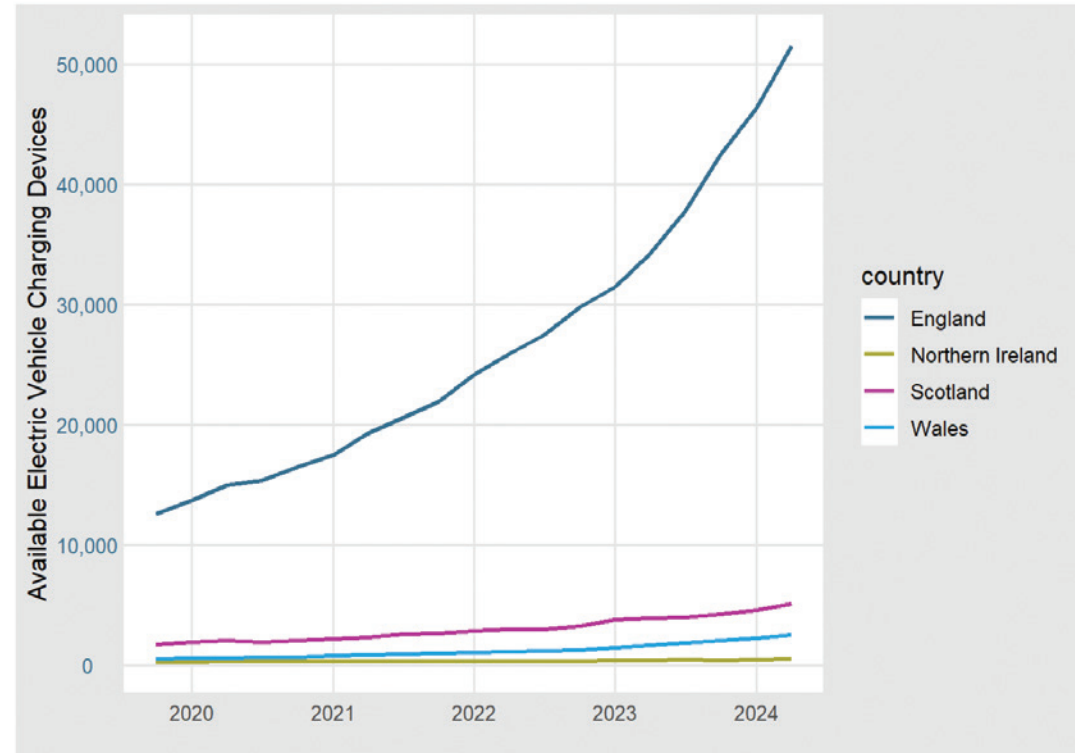


PUBLIC EV DEVICES – BY COUNTRY

A major source of growth in electrical transmission and distribution equipment is related to EV charging networks in the private sector.

Continuing increase in publicly available EV charging devices is welcomed. There is limited data currently on the installation rates for different forms of EV charging equipment, certainly in the non-regulated, private sector.

A major source of growth in electrical transmission and distribution equipment is related to EV charging, especially with rapid charging networks. Greater visibility of the variation in chargepoint delivery would aid supply chain planning as we see a lot of capacity in the electrical transmission and distribution supply chain taken up today from this rollout and there is value in tracking this against required grid investment needs.

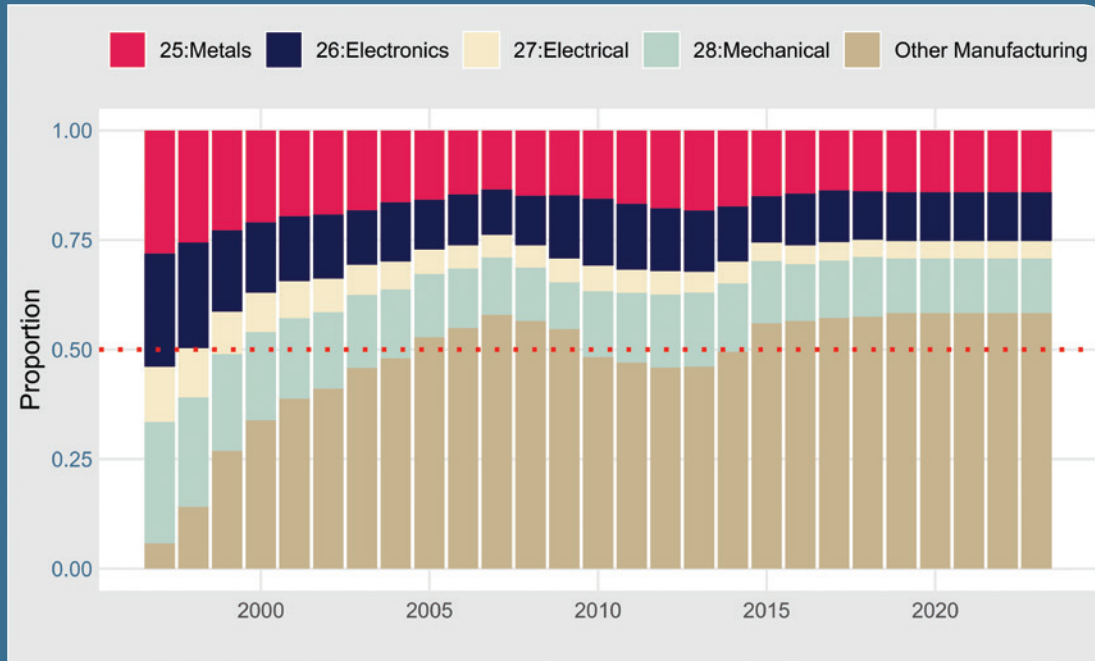


Source: ZapMap

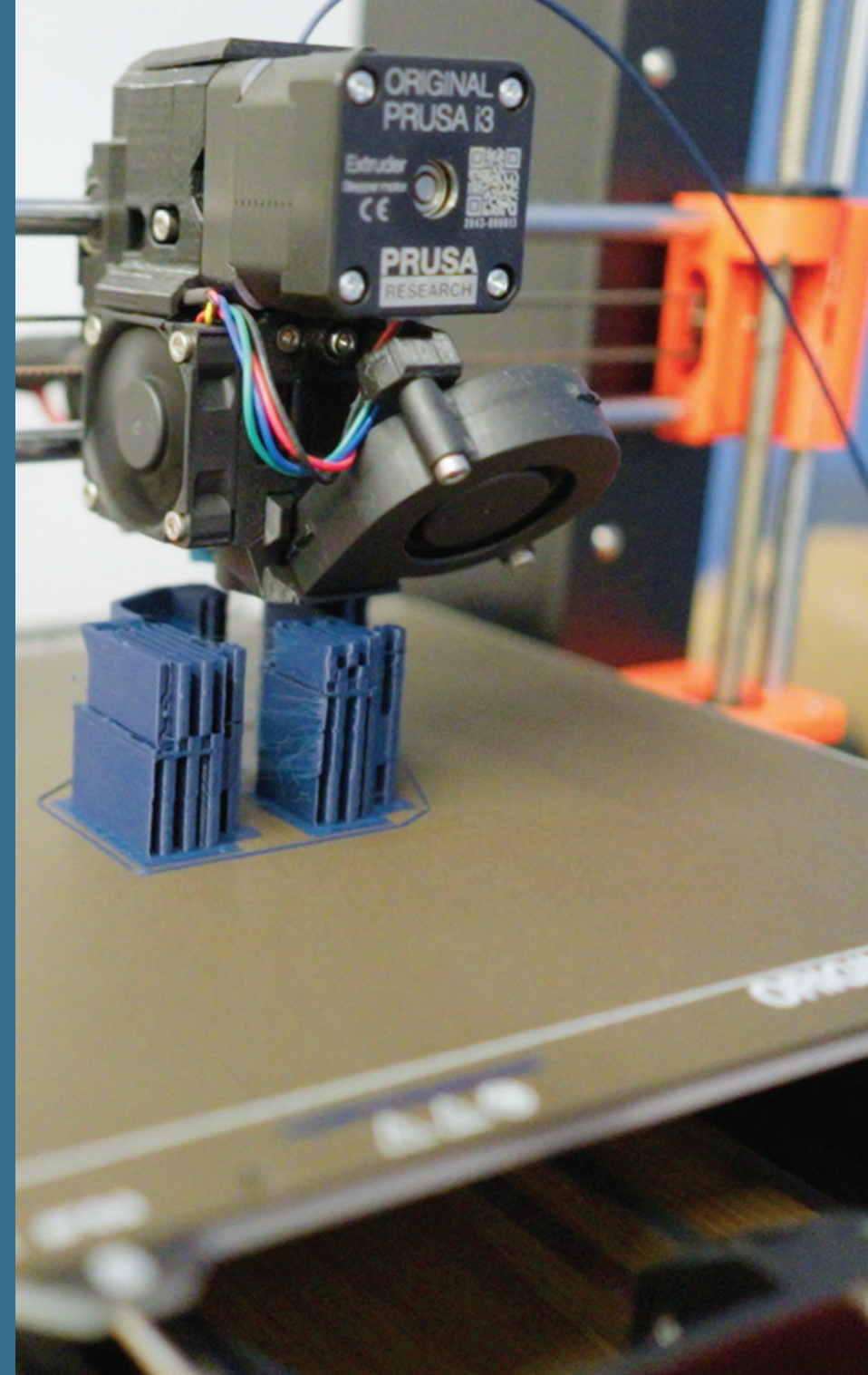
 Publicly available electric vehicle charging devices at all speeds by UK country, from October 2019

WEIGHTING OF PROPORTIONS OF GDP FOR MANUFACTURING

The proportion by value of electrical manufacturing in the UK has declined dramatically from 12.6% of manufacturing in 1997 to only 4% in 2023. The challenge to drive growth and improve supply chain availability is clear.



Source: ONS



Electricity Network Infrastructure

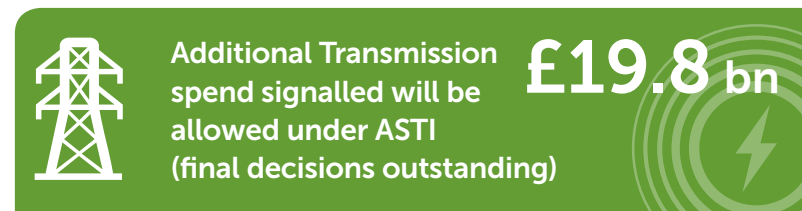


Investment in electricity networks as projected will have to increase significantly in the coming decades to enable the electrification of heat, transport and where applicable industry. Electricity lines, cables and substations will have to increase in quantity by roughly 20-50% by 2050, which could translate to up to £105 bn until 2035⁵.

This significant growth in networks will require investment in increasing manufacturing capacity. The move to strategic transmission planning by the soon to be established National Energy System Operator (NESO) and Ofgem decisions to accelerate transmission investment have given some improved confidence to the market. Further confidence in a pipeline of orders will be required for manufacturers to invest in growing capacity to meet Net Zero needs, and similar progress in the distribution sector will be necessary.

Transmission

BEAMA welcome Ofgem's decisions to accelerate the delivery of RIIO T2 and RIIO T3 investment plans through the Accelerated Strategic Transmission Investment (ASTI) programme, worth £20bn. Recently, the first of these projects passed the final stage of approval by Ofgem, where Ofgem awarded £4.3bn⁶ for the Eastern Green Link 2 project⁷. Confirming the high-level needs-case for £19.8bn⁸ additional spend under ASTI, as compared to the load related investment of £11.1bn initially awarded in RIIO T2⁹, and as part of this making available pre- and early construction funding, represented a step change in regulatory decision-making and enabled early supply chain engagement. The decision to accept the need for projects ahead of the detailed designs and planning applications being submitted and exempting projects from competitive delivery, supported the move to more strategic network development required in GB going forward.



⁵ BEAMA 2022 [Growing the Supply Chain for a Net Zero Energy System](#)

⁶ Adjusted to 2024 values

⁷ [Go-ahead for UK's biggest subsea connection project | National Grid Group](#)

⁸ [Ofgem Decision on Accelerating Strategic Transmission Investment \(ASTI\)](#), p. 13. Ofgem provisionally identified 26 strategic electricity transmission projects recommended by the ESO worth £19.8bn as meeting the ASTI criteria (a) being larger than £100m; b) in whole or in part load-related; c) needed by 2030 to connect 50GW of offshore wind generation, and, d) acceleration resulting in consumer benefit).

⁹ Ofgem, 2024 [Electricity Transmission Price Control Financial Model](#)

BEAMA member companies supplying equipment to GB Transmission Owners (TOs) have benefitted from this programme, as some TOs have ahead of time contracted for some of the manufacturing capacity required to deliver the projects. However, in order to meaningfully compete for sparse capacity globally, and indeed drive further investment in additional capacity, TOs need to further evolve their procurement models towards truly strategic procurement of *programmes* of work (rather than procuring project by project). Ofgem’s regulatory frameworks may also need to evolve further to enable this change.

Distribution



RiIO ED2 provided allowances of £2.36bn across all of the DNOs for the period 2023- 2028 for network reinforcement, alongside uncertainty mechanisms to increase and decrease allowances where required. There are no reports yet on actual spend for ED2. However, the underlying assumptions regarding load growth will likely need review. The DNOs undertook an exercise in 2018 to develop a common base for their scenarios⁸, and have been publishing their Distribution Future Electricity Scenarios (DFES) annually since. The result of the 2018 exercise was

to produce forecasts for EV and HP populations by 2030. These were based on the FES Steady Progression Scenario for heat pumps and Two Degrees for EVs. The ESO is now planning on the basis of the 2024 FES Holistic Scenario.

DNOs and NESO are best placed to assess the overall implication of these trends for expected network demand and required investment. However, it is important to factor in realistic, evidence-based assumptions about the flexibility of HPs, to ensure that DNOs do not underestimate expected maximum demands and network loading, and as a result assume too slow a rate of network reinforcement.

Better data on the connections of Low Carbon Technologies (LCTs) to the networks is important in enabling strategic planning and realistic assumptions. BEAMA fully supports the ongoing initiatives to address data gaps in LCT grid connections. However, to ensure these efforts deliver successful outcomes, greater urgency and focus are needed. Accelerating the development, implementation and integration of these projects will be critical in overcoming existing challenges, enabling timely infrastructure planning and ensuring the manufacturing sector is prepared to meet the demands of a low-carbon future.

The figures for EVs and HPs can be seen below:

	ENA Common Assumption	FES 2024 Holistic
 HEAT PUMPS	253,581	4,079,975
 EVS	10,100,00	7,321,797

8 ENA Common Scenario Report, 2018

Conclusion



Broadly we recognise a gap between projected need and actual delivery, although in places (grid) patchy data doesn't allow us yet to fully analyse where we are against future need. Overall electrification in the real world (transport and heat) is not delivering at the speed needed to meet the 2050 target, and certainly not aligned with Labour's 2030 vision.

The most significant and concerning shortfall is in the low carbon heat market, where we see a growing gap emerging between actual delivery and projected. We do not believe this can be filled through heat pump deployment alone and we need to expand the basket of heat electrification measures to reach the 20% of homes not suited for heat pump deployment at the very least – this includes the full range of heat storage solutions. Neglecting this and the overall need for a robust home retrofit plan across the UK will fundamentally limit progress to 2050.

Further to this ensuring the post 2025 plan for Smart Meter rollout supports energy suppliers to increase installations of smart meters, connection of SMETS1 and resolution to current connection issues is absolutely central to Labour's 2030 clean energy target. We will not achieve a decarbonised energy system if we don't have engaged consumers. Currently 11 years away from having a complete working network we are at risk of seriously delaying progress on the widespread adoption of flexible energy management which is a key enabler for electrification. BEAMA will be publishing more on this in the coming weeks.

We would like to analyse electricity network investment figures in more detail and understand to which extent strategic planning and regulatory frameworks are driving network owners to invest at the ambitious rate required to enable networks ready for an electrified economy, and connecting the required aligned low-carbon generation capacity. It is essential that network companies reinforce ahead of need and RII03 will need to encourage anticipatory investment in order to be fit for purpose. Anticipatory network investment will be central to avoid steep inclines in demand for infrastructure equipment that would put pressure on supply chains. Starting reinforcement early and making a steady pipeline of orders visible will allow the supply chain to prepare and invest. We do have a concern that network owners may not be planning to invest against realistic projections for electrification and required asset replacement associated with ageing assets. This could leave scope for under-investment in network reinforcement and the supply chain.

The key message for Government and policy and regulatory teams is that optimism and confidence is very far from the level required to build a growing and sustainable supply chain in the UK. Investment cycles can have long lead times and are built on a level of certainty. The particular challenge rests with innovators who have been operating in the electrification space for some time (particularly related to heat electrification) but are finding commercialisation at scale a very difficult prospect due to the slow progress with policy support and uncertainty over the construction sector outlook.

As stated in the report, the detail and implementation plans for GB Energy, the Warm Homes Scheme and other fiscal measures, the Home Energy Model, the Future Homes Standard, EPC reform and other instruments related to the built environment are now business critical. Without clarity in the lead up to the end of 2024, we foresee a downturn in optimism and

possibly businesses unable to sustain their journey; a journey built on the rhetoric of successive Governments to push for an energy market transition.

This report markets the start of what we hope will evolve into a substantial record of supply chain statistics tracking progress on the delivery of the UKs 2030 and 2050 target. We want to ensure this starts a conversation around how we bridge the gap between projected delivery and actual figures, and the journey we need to go on to drive investment into the manufacturing supply chain. We know planning is central to the Labour's 2030 clean energy mission and as a supply chain we will continue to contribute our trends work into Mission Control. Working also through the UK Electricity Products Supply Chain Council we hope to collaborate with other Trade Associations in the sector to collate data and develop much clearer understanding of the whole supply chain today.



UK Electricity Products Supply Chain Council

BEAMA's work to track data and relate it to delivery will be stronger with collaboration with other stakeholders. We intend to use the Electricity Products Supply Chain Council as a vehicle to cooperate with trade bodies, Government representatives and other stakeholders and to discuss the implications of trends. The EPSCC was set up by BEAMA in Autumn 2022 following the publication of our report with the Energy Systems Catapult on 'Growing the Supply Chain for Net Zero', which found that to meet Carbon Budgets and Net Zero targets we need to strengthen supply chains to accelerate delivery. The Council has been focused on the electricity transmission sector in recent months, working on a task allocated to the Council in the aftermath of the Electricity Networks Commissioner's report.

With a new government since July 2024, there is a refreshed policy context with specific aims for a 'clean power sector' by 2030 alongside the longer-term Net Zero goal. This puts more emphasis on the need to galvanise momentum behind work that can help build capacity in the UK supply chain and manufacturing sectors specifically, and data capture is an important requirement for facilitating that growth.

Specific work will include trade associations to share and gain oversight of current market trends, and tracking supply chain shortages and long lead times. A project to estimate the Value Added to the UK of accelerating transmission network infrastructure deployment, working with transmission owners and others, was begun but then on hiatus due to impacts of the general election. These will be valuable for industry and Government and we will link the work of the Council to the BEAMA Market Pulse.



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