ENERGISE LANDSCAPE
POWERING TOMORROW TOGETHER



ENERGY LANDSCAPE UK 2026 · CONFERENCE & EXHIBITION

The ELUK2026 Energy Leadership Declaration

Stop Talking. Start Building.
The sector's collective mandate to government for the next twelve months.

3–4
November 2026

BUTCHERS' HALL LONDON

THE ENERGY TRILEMMA: BRITAIN'S THREE-FRONT WAR IT CANNOT AFFORD TO LOSE

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A MESSAGE FROM YOUR MANAGING DIRECTORS

Thank you. You did not just attend. You wrote the mandate.

Over two days at Butchers' Hall, the people who build, finance, run and regulate Britain's energy system stood in one room and refused to be polite about the gap between promise and delivery.

To our delegates, panellists, speakers, sponsors, exhibitors, supporters and partners: thank you. You gave us ten panels, two keynotes, a case study and two closing debates of candour, challenge and ideas. You put your names to hard questions. You stayed for the last session on the last afternoon. That is what a sector that means business looks like.

The result is the ELUK2026 Energy Leadership Declaration: the sector's collective mandate to government for the next twelve months. It exists because of what you said, and it will only matter if what happens next matches it. So we are asking you to do one more thing. Take it. Share it. Hold us, and government, to it.

Thank you also to our official partners, sponsors and supporters who made two days at a new venue run so well, and to Wolfe Power Club and New Energy Weekly for carrying the conversation beyond the room.

The conversation does not end here. It grows. We are taking the same ambition to a bigger stage:

ELUKE2027
Energy Landscape UK & Europe
17–18 November 2027

ELAPAC2027
Energy Landscape APAC
22–23 September 2027

Britain does not have a shortage of ambition. It has a shortage of dates that hold and people accountable for them. Let's change that, together.

With gratitude and determination,
Rekha Kaur & Andy Beales
Managing Directors, Energise Landscape Ltd

THE DECLARATION AT A GLANCE

Stop Talking. Start Building.

To the Government, the regulators and every party that wants to govern Britain: the sector does not need a new ambition. It needs decisions, dates and someone accountable. These twelve commitments are what we ask you to adopt, own and report on, and what we will hold ourselves to in return.

Cost
Nobody can defend today's electricity price. Industry can plan around a price. It cannot plan around volatility.

Security
Produce more at home, in a mix no single shock can break, on a supply chain Britain can rely on.

Decarbonisation
Politics divides on pace. Investors agree on one thing: stability is the cheapest policy available.

OWN THE WHOLE SYSTEM

1 **One owner for the whole system**

2 **A national deployment pathway**

3 **Policy stability**

BUILD THE GRID

4 **Connections you can plan around**

5 **Build the grid in half the time**

CUT BILLS AND PROTECT HOUSEHOLDS

6 **Lower bills, protect those who cannot pay**

7 **Homes as energy infrastructure**

SECURE SUPPLY AND KEEP INDUSTRY COMPETITIVE

8 **Firm, sovereign power**

9 **Keep British industry in Britain**

INVEST, SKILL UP AND MAKE THE CASE

10 **A route to market and capital that match the ambition**

11 **A skills and jobs plan with a permanent home**

12 **Make the case, and share the benefit**

What we ask of you

Adopt the twelve commitments. Name one owner for each, with a date. Publish progress at 90 days, 6 months and 12 months, and report back in full at ELUKE2027. The sector will do its part, and will say publicly where it has not. **Sign the Declaration →**

READ THE DECLARATION IN FULL →

Commitments are a synthesis prepared for sector sign-off. Lead bodies and deadlines are proposals for signatories to confirm; they are not undertakings given on stage.

WITH SINCERE THANKS

THANK YOU TO OUR
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REA

Energy UK

MEDIA PARTNERS

New Energy Weekly

ENERGY GULLY™

WOLFE POWER CLUB

OUR SPEAKERS

Thank you to our panellists

Chairs, panellists, keynote speakers and case-study presenters who took the stage at ELUK2026. Thank you for your time, your candour and your commitment to the Declaration.



Richard Tice MP
Deputy Leader, Reform UK



Harriet Cross MP
Conservative MP, Gordon and Buchan



Rt Hon Sir Robert Buckland KBE KC
Third Church Estates Commissioner at Church Commissioners for England



Oliver Holbourn
Executive Director and Chief Executive Officer at UK National Wealth Fund



Poppy Airey
Market Analyst, Xoserve



Adrian Del Maestro
VP Global Energy Advisory, AECOM



Richard Brown
Commercial Director, Osmose Europe



Dr Elina Militello Asp
Scenarios Team Lead, Plasma Science & Fusion Operations Division at UKAEA



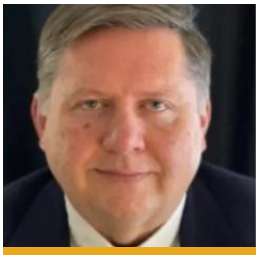
Derreck van Gelderen
Partner - Head of AI advisory & AI Energy Lead at PA Consulting



Tilly Spencer
Chief Technical Officer, Sizewell C



James Ringrow
Director of Strategy, DCC



Jeptha Allen
Managing Director, Access Information Advisory



Chris Rowell
Head of Net Zero, Tees Valley Combined Authority



Louise McClelland
CEO, Dowds Group



Dr Iliana Cardenes
Director – Strategic Interventions & Partnerships at Great British Energy (GBE)



Prof. Will Drury
CEO, PNDC, University of Strathclyde



Elizabeth de Jong
CEO, Fuels Industry UK



Jonathan Minnitt
VP Business Development, Entr (Aker Solutions)



Sarah Mintey MBE
CEO, Developing Experts



Ben Hunt
SVP Communications, Public Affairs and Sustainability at JERA Nex bp



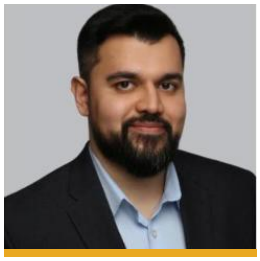
Trevor Hutchings
Chief Executive at Renewable Energy Association (REA)



Juliette Sanders
Chief Communications Officer, Energy UK



Fiona Reilly HonFEI, HonFNucl
CEO, FiRe Energy Ltd



Bahzad Ayoub
Manager - Offshore Wind at Westwood Global Energy Group



Abbie Badcock-Broe
Strategic Advisor, Independent Industry Consultant



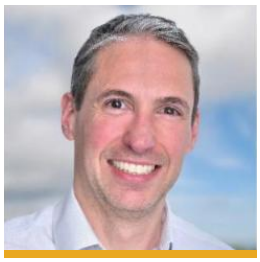
Dr Sarah Kimpton
Vice President, UK & Ireland, Energy Systems at DNV



Eva Robson
Business Development Director at J Coffey Data Centres & Energy



Jamie East
The Training Guy



Richard Britton
Global Head of Offshore, Nadara



Lynne Matthews FNucl
Founder & Director, LM Consultants



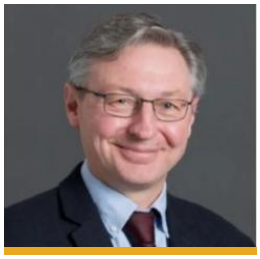
Carol Yan
General Manager, Energy, Utilities and Industrials, UKI at Amazon Web Services (AWS)



Christian Gibson
GM UK Energy System & Transition, Shell



Dan Wolff
Head of Strategy & Investment, UKFE



Chris Gilbert
Director, Decarbonisation Consulting Ltd



Nick Curum
Founder, AI Energy Think Tank



Tristram Denton
UK Director, Fusion Industry Association



Mark Livingstone
Partner, Bright Futures



Rebecca Harrison-Vickers
Director Residential New Build Transformation, E.ON



Graham Robinson
CTO, Smart DCC



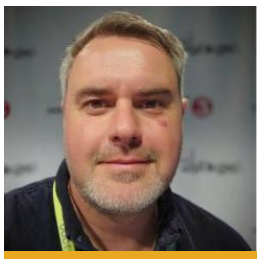
Andy Sutton
Co-Founder, Sero and Strategic Lead, ...as architecture



Simon Emeny
Director Specialist Markets, LRQA



Mark Selby
Founding Editor, New Energy Weekly



Huw Davies
Head of Skills for Fusion, UKAEA



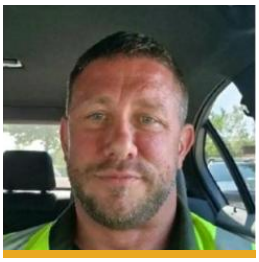
Andrew Fraser
Director, Moore Insight



Maurice Lynch
Engineering Director Power, United Infrastructure



Alex Wolfe
CEO, RTFA; Host, Wolfe Power Club Podcast



Mark Warner
Managing Director, AMW Contractors UK Ltd



Paul Kavanagh
Net Zero Energy Fund



Graham Nicholson
Senior Principal Consultant, Entr (Aker Solutions)



Ewen Cairns
Director, London, DWF



Colin Hudson
MD Investment & Advisory, National Wealth Fund



David Weatherall
Head of Policy, BRE



Lord Bird MBE
The Big Issue founder and Crossbench peer at The House of Lords



Stephen Todd
Head of Partnerships, e2 Energy Partners

ELUK2026 IN NUMBERS

Event highlights

200	50	27	159,888	1
DELEGATES	SPEAKERS	SPONSORS & SUPPORTING PARTNERS	IMPRESSIONS	ENERGY DECLARATION

Two days, one venue, and a room that included policymakers, regulators, developers, networks, investors, innovators and the supply chain. The organisations represented at ELUK2026 included:

21 Degrees · ABB · Access Information Advisory · AECOM · Agratas – A Tata Enterprise · AI Energy Think Tank · Air Marketing · Airturb · Aker Solutions · Alpha Systems Fabrication Ltd · Amazon Web Services · AMW Contractors · Balfour Beatty · BRE · Bright Futures · BT · Business Daily Group · CBRE · Centre for Maritime Diplomacy · Church Commissioners for England · Church of England Environment Programme · Climingo · CmY Consultants Ltd · Commercial Clarity Advisor · Conservative Party · Data Communications Company (DCC) · Decarbonisation Consulting Ltd · Department for Energy Security and Net Zero · Developing Experts · DNV · Dowds Group · Drop Box Green Energy Solutions · DSM Solutions · DWF · E.ON · e2 Energy Partners · EARNZ Plc · Energise Landscape · Energy UK · Entr (part of Aker Solutions) · EPAM Systems · Ethos Engineering · EUA Utility Networks · FiRe Energy Ltd · Flow Vendor · Fuels Industry UK · Fusion Industry Association · Government's Network Innovation Taskforce · The Green Alliance · The Food Foundation · Electrify Industry · Great British Energy (GBE) · House of Commons · Labour Party · House of Lords · Independent Utility Advice · Infinis · J Coffey · J Coffey Data Centres & Energy · JERA Nex bp · Katharos · Kerry London · Lloyds · LM Consultants · LRQA · Lubrizol · Majenta Solutions · Mitie · Moore Insight · Mulvany Consulting · Nadara · National Grid · National Wealth Fund · NatWest · Net-Zero Energy Fund · New Energy Weekly · New Nuclear · Nodus ICP Ltd · Northern Impact · Nubeo Technology · Osmose Europe · PA Consulting · PNDC · Reform UK · Rendesco · Renewable Energy Association (REA) · Royal Academy of Engineering · Sellafield Ltd · Sero & ...as architecture · SGS Energy · Shell · Sizewell C · Somerford Energy · Technip Energies · Tees Valley Combined Authority · The Energy Group · The Training Guy · Thermal Road Repairs Ltd · Tony Blair Institute for Global Change · Transformational Energy Ltd · UK Atomic Energy Authority (UKAEA) · UK Fusion Energy Ltd (UKFE) · United Infrastructure · University of Strathclyde · Westwood Global Energy Group · White Lotus Energies · Wolfe Power Club · Xoserve

THE TWO DAYS IN PICTURES

From the room









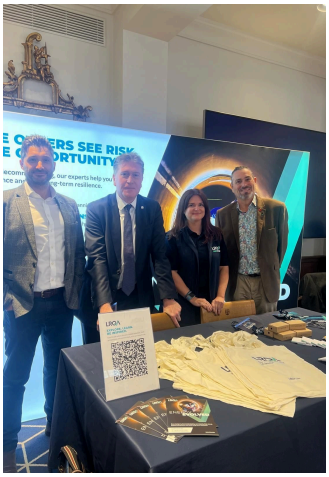





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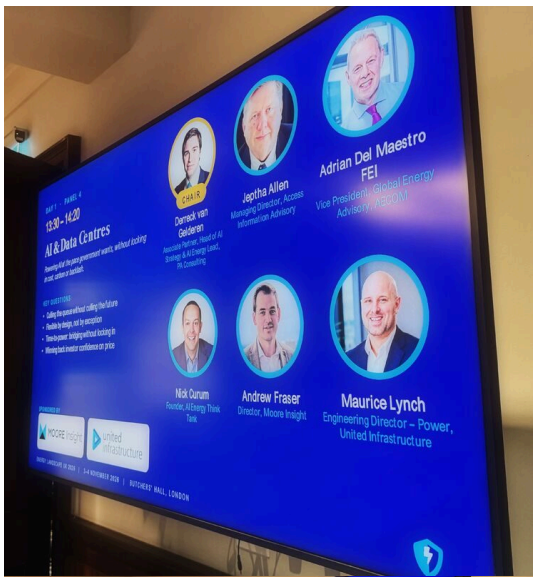

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ENERGY GROUP








13:30 - 14:20
AI & Data Centres
Derrick van Gelderen
Ieptha Allen
Managing Director, Access Information Advisory
Adrian Del Maestro
FEI
Nick Qurum
Andrew Fraser
Director, Moore Insight
Maurice Lynch
Engineering Director – Power, United Infrastructure


ENERGY
LANDSCAPE UK [ELUK 2026]
CONFERENCE & EXHIBITION
3-4TH NOVEMBER 2026
BUTCHER'S HALL, LONDON
THE ENERGY TRILEMMA:
BRITAIN'S THREE-FRONT WAR
IT CANNOT AFFORD TO LOSE
SECURITY WITHOUT COMPROMISE.
AFFORDABILITY WITHOUT APOLOGY.
SUSTAINABILITY WITHOUT DELAY.

ELUK2026 Energy Leadership Declaration

Stop Talking. Start Building. · *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*

Draft for sector sign-off. The commitments below are drawn from ten panels, two keynotes, a case study and two closing debates. The lead bodies and deadlines are proposals for signatories to confirm, and deadlines run from the date this Declaration is submitted. They are not undertakings given on stage.

The mandate

To the Government, the regulators and every political party that wants to govern Britain:

Over two days in November 2026, the people who build, finance, run and regulate Britain's energy system met in one room. They did not come to ask for a new ambition. Britain has plenty of ambition. They came because the gap between what has been promised and what has been delivered is now the biggest risk to the country's bills, its security and its climate goals.

They said it plainly. The failure is not a lack of technology. It is a failure to plan and deliver the energy system as a whole, with one owner, one plan and dates that hold.

Every session asked for the same three things: **decisions, dates and someone accountable.**

This Declaration is the sector's collective mandate for the next twelve months. It sets out twelve commitments. Each has a proposed lead and a proposed deadline, and each can be checked. We ask you to adopt them, own them and report on them. In return, the sector will play its part, and will say publicly where it has not.

Why now

The trilemma has three fronts, and Britain is under pressure on all of them at once.

Cost. The opening political debate agreed that nobody can defend today's price of electricity, and that those least able to pay must not carry the cost of the transition. Industry added that it can cope with a price it can plan around. What it cannot cope with is volatility.

Security. Across party lines, speakers said Britain should produce more of its own energy. The sovereign power panel and the nuclear, fusion and fuels sessions all pointed the same way: a mix that no single shock can break, built with a supply chain Britain can rely on.

Decarbonisation. This is where politics divides, on pace and on the legal framework. But every industry panel gave the same answer: investors, installers and lenders cannot plan against shifting signals. Stability is not a favour to the sector. It is the cheapest policy available.

One word ran through the grid session and echoed through the event: **slippage.** Missed dates, long consenting times and uncertain connection offers hurt investment more than bad news does.

What the sector told us

1. **The problem is the system, not the technology.** The Day 1 closing debate named silos, first-of-a-kind thinking and the gap between a good idea and proof at scale. As one panellist put it: "It's not a lack of

technology." (Dr Sarah Kimpton, DNV)

2. **The grid is the binding constraint.** Connection dates, consenting times and open data came up in the offshore wind, grid, data centre and homes sessions.
3. **Certainty beats cheapness.** Developers, manufacturers and lenders all asked for stable rules and firm timetables.
4. **People build the system.** Skills, workforce plans and routes into energy jobs were raised in almost every session.
5. **The public has not been brought along.** The case for energy infrastructure is not being made in plain language, and communities hosting it often see little benefit.
6. **Capital will come if the risk is shared.** As the National Wealth Fund's chief executive told the room: "None of this is achievable alone." (Oliver Holbourn)
7. **Proof matters more than promises.** The sector's own test is: "Validate and then deploy at pace." (Prof. Will Drury, Power Networks Demonstration Centre)

The twelve commitments

Each commitment below is a proposal for signatories to confirm. The last column shows where it comes from; every source is linked in Further reading.

Own the whole system

#	We call for	Proposed lead	Proposed deadline	Where it comes from
1	**One owner for the whole system.** A single accountable owner for the energy system, and one whole-system plan joining generation, networks, flexibility, heat and demand, with a cross-utility planning forum.	Government, with DESNZ as lead department	Owner named within 90 days; plan within 12 months	**Both closing debates**; Panels **3** and **8**
2	**A national deployment pathway.** A five-year route for proven technology to reach networks and homes at pace, flexibility-ready from the next price control, with an open route for SMEs and innovators and interface standards for new fuels.	DESNZ, Ofgem, DSIT	Start within 6 months; Ofgem in the next price control	**Day 1 closing debate**; Panel **7**; **Day 2 closing debate**
3	**Policy stability.** A long-term, cross-party energy framework and a stability protocol: no major change without a published replacement and consultation.	Government and all parties	Before the next general election	Panels **1**, **2**, **3** and **5**; **Day 2 closing debate**

Build the grid

#	We call for	Proposed lead	Proposed deadline	Where it comes from
4	**Connections you can plan around.** Firm, accurate connection dates for every project in the reformed queue, quarterly public reporting of slippage, speculative applications cleared, and clear criteria for large new demand such as data centres, including co-location with resilience safeguards.	NESO, Ofgem, network operators, DESNZ	First report within 90 days	Panels **3** and **4**; **Day 2 closing debate**
5	**Build the grid in half the time.** Halve transmission planning and consenting times, turn the Strategic Spatial Energy Plan into a delivery pipeline with one public dashboard, and tie seabed leasing to a realistic grid connection.	DESNZ, NESO, planning bodies, Crown Estate	Roadmap within 6 months	Panels **2** and **3**; **both closing debates**

Cut bills and protect households

#	We call for	Proposed lead	Proposed deadline	Where it comes from
6	**Lower bills, and protect those who cannot pay.** A costed plan to cut policy costs on electricity bills and lower industrial energy costs, targeted support, a protected affordable baseline, and an assessment of the cumulative cost of policy on households.	HM Treasury, DESNZ	Spring 2027 fiscal event	Panels 1 and 3; Lord Bird keynote; Day 2 closing debate
7	**Homes as energy infrastructure.** Double annual heat pump installations alongside insulation and installation quality, publish the timetable for the Home Energy Model and Future Homes Standard, treat the Standard as a minimum, measure outcomes, and set rules for renters.	DESNZ, MHCLG, developers	Targets in the next spending review; timetable within 6 months	Panel 5; Day 1 closing debate

Secure supply and keep industry competitive

#	We call for	Proposed lead	Proposed deadline	Where it comes from
8	**Firm, sovereign power.** Run nuclear as a fleet programme and share delivery lessons, set market frameworks for firm power, publish security criteria for ownership and supply chains, sustain a fusion delivery pipeline, and publish an independent winter resilience assessment.	DESNZ, HM Treasury	Programme decisions within 12 months; resilience assessment by end of Q1 2027	Panels 1, 6 and 8; Sizewell C case study
9	**Keep British industry in Britain.** Set the date and scope of the carbon border adjustment for refined products, review carbon pricing competitiveness, extend carbon capture beyond the first two clusters, and publish a national plan for foundational industries and fuels resilience.	HM Treasury, DESNZ	Within 12 months	Panels 1 and 10

Invest, skill up and make the case

#	We call for	Proposed lead	Proposed deadline	Where it comes from
10	**A route to market and capital that match the ambition.** A fixed annual allocation-round calendar with no skipped rounds, indicative pot sizes and a route to market for floating wind, a funded early-stage route, a single guide to public finance with cross-referral, and options to close the grid financing gap.	DESNZ, HM Treasury, National Wealth Fund, Great British Energy	Within 6 months	Panels 2 and 7; Day 2 opening keynote
11	**A skills and jobs plan with a permanent home.** A national energy skills delivery plan, a workforce plan for every major project before final investment decision, apprenticeship reform, and routes into energy jobs for people furthest from work.	DfE, DESNZ, skills bodies, industry	Plan within 6 months	Panels 3, 6 and 9; Day 2 opening keynote; Lord Bird keynote
12	**Make the case, and share the benefit.** An honest, plain-language public campaign on what the energy system delivers for bills and security, and a community benefit standard for areas that host infrastructure.	Industry, Government, MHCLG	Campaign within 6 months; benefit standard within 12 months	Panels 1, 2 and 4; both closing debates

The sector's side of the bargain

These were offered or proposed across the sessions. Signatories will be asked to confirm them.

- **Publish the pipeline.** Industry bodies to put a numbers-backed minimum value pipeline to government so the supply chain knows what to commit to (Panel 2).
- **Come to public finance early.** Bring bankable, meaningful projects to public financiers early and not late (Day 2 opening keynote).
- **Raise the floor on new homes.** Developers to treat the Future Homes Standard as a minimum, with BRE offering to take ownership (Day 1 closing debate).
- **Make it a flexible system.** Data centre operators to offer demand flexibility and system services, and enterprise customers to review resilience requirements (Panel 4).
- **Tell the story properly.** Lead plain-language public communication, including STEM engagement, as everyone's responsibility (Day 1 and Day 2 closing debates).
- **Show the evidence.** Report back at next year's summit with case studies of what worked and what made it work (Panel 4).

How this will be held to account

A mandate is only as good as its follow-up. The following is proposed for Energise Landscape and signatories to confirm.

- One named lead and one date for every commitment, as set out above.
- A public progress note against each commitment at 90 days, 6 months and 12 months.
- A full report back at ELUKE2027, showing what was delivered, what slipped and why.

The event theme was a war on three fronts that Britain cannot afford to lose. The sector has done the diagnosis. The next twelve months are about delivery.

Further reading

Every session has its own overview, with the full account of what was said, where views differed and the commitments that came out of it. Panel 1 and the closing debates, keynotes and case study name their speakers. Panels 2 to 10 were held under the Chatham House Rule, so their overviews do not attribute remarks to individuals.

Opening and closing sessions

Session	Overview
Day 2 opening keynote: Financing the Clean Energy Transition	Opening Keynote Day 2 Overview
Day 1 closing debate: From Debate to Delivery	Closing Debate Day 1 Overview
Day 2 closing debate: Stop Talking. Start Building. The Energy Sector's Pledge to Britain	Closing Debate Day 2 Overview

Keynote and case study

Session	Overview
Keynote address by Lord Bird MBE	Lord Bird Keynote Overview

Session	Overview
Case study: Sizewell C, On Time, On Budget, and Building the Blueprint Britain Needs	Sizewell C Case Study Overview

Panels

Panel	Topic	Overview
1	Opening political debate: Net Zero at the Crossroads	Panel **1** Overview
2	Offshore wind	Panel **2** Overview
3	Grid transformation and energy system integration	Panel **3** Overview
4	AI and data centres	Panel **4** Overview
5	Homes as energy infrastructure	Panel **5** Overview
6	Fusion	Panel **6** Overview
7	The Global Clean Energy Investment Race: How Does Britain Win Its Share?	Panel **7** Overview
8	Sovereign Power: Building the Energy Mix That No Geopolitical Shock Can Break	Panel **8** Overview
9	Who Builds Britain? The Skills, Talent and Workforce Strategy the Energy Transition Demands	Panel **9** Overview
10	Decarbonise to Dominate	Panel **10** Overview

A note on attribution and figures

Positions, claims and figures in the session overviews are those of the individual speakers as stated on stage. They are not the views of Energise Landscape Ltd or ELUK2026, and have not been independently verified. This Declaration deliberately quotes no figures, so that nothing rests on a number that has not been checked. Where a figure matters, read it in the relevant overview, with its speaker, and check it against its original source. The twelve commitments are a synthesis prepared for sector sign-off, not a record of undertakings made on stage.

↑ Contents

MAKE IT COUNT

HOW TO SIGN

The Declaration is only a mandate if people put their names to it. There are three ways to sign, and every one is published, with your permission, so government can see who stands behind it.

1. Endorse

Support the Declaration as a whole. Your organisation's name and logo are listed as a signatory.

2. Back specific commitments

Choose the commitments (1 to 12) you will publicly stand behind and champion in your own work.

3. Pledge action

Commit your organisation to something concrete from "the sector's side of the bargain", with a date.

Lead bodies

If your organisation is named as a proposed lead in the commitments, we will contact you directly. We ask you to accept the role, confirm or change the deadline, and tell us what you would amend. A lead that has confirmed is shown as **confirmed**. Until then, it remains **proposed**.

What happens next

1. **Sign.** Complete the form on the next page and email it to Andy Beales, or use the button below.
2. **Confirm.** We approach each proposed lead one to one and update the commitment tables with what they accept, change or decline.
3. **Submit.** The Declaration, with its signatories and confirmed leads, goes to Government and the regulators. We ask for a written reply and publish what comes back, including silence.
4. **Report.** A public scorecard at 90 days, 6 months and 12 months, and a full report back at ELUKE2027 on 17–18 November 2027.

SIGN BY EMAIL → andy.beales@energiselandscape.co.uk

Signing is a statement of support. It does not bind your organisation legally. Listed names and logos are published only with your permission.

SIGN-UP FORM

I will sign the Declaration

Full name

Job title

Organisation

Email

Phone

Website

How I will sign

☐ 1. Endorse the Declaration ☐ 2. Back specific commitments ☐ 3. Pledge action

Commitments I will back

☐ 1. One owner for the whole system ☐ 2. A national deployment pathway ☐ 3. Policy stability

☐ 4. Connections you can plan around ☐ 5. Build the grid in half the time

☐ 6. Lower bills, protect those who cannot pay ☐ 7. Homes as energy infrastructure ☐ 8. Firm, sovereign power

☐ 9. Keep British industry in Britain ☐ 10. A route to market and capital that match the ambition

☐ 11. A skills and jobs plan with a permanent home ☐ 12. Make the case, and share the benefit

My organisation's pledge (if any)

If my organisation is a proposed lead

☐ I accept the lead role ☐ I accept with changes ☐ I decline

Commitment number(s)

Deadline I can confirm

Permission

☐ You may publish my name and organisation ☐ You may publish our logo

Signature

Date

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DAY 1 · OPENING POLITICAL DEBATE · OVERVIEW

Opening Political Debate: Net Zero at the Crossroads: Can Britain Afford Not to Deliver Its Clean Energy Ambition?

Positions, claims and figures in this overview are those of the individual panellists as stated on stage. They are reproduced from the session transcript and are not the views of Energise Landscape Ltd or ELUK2026.

The headline

Britain's opening political debate did not argue about whether energy matters. It argued about what energy is *for*. All three politicians landed on the same answer in different words: cheap, secure and abundant energy first, with decarbonisation judged by whether it delivers those things. The Chancellor's move to "clean and cheap", noted by the chair, is now common ground, and the fight at the next general election is over how far to go beyond it.

For the Declaration, Panel 1 sets the terms: **affordability, security and delivery are the tests every other panel's commitments will be measured against.** It also showed where political consensus is real (the grid, the cost of bills, no picking winners, investor certainty) and where it is not (the Climate Change Act, carbon capture, the pace and ambition of net zero).

This maps directly onto the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*. Two fronts, cost and security, drew cross-party agreement. The third, decarbonisation, is contested.

The panel

Panellist	Role	Position in one line
Alex Wolfe (Chair)	CEO, Renewable Transport Fuel Association (RTFA); host, Wolfe Power Club podcast, ELUK2026 Official Media Partner	Framed the debate around the Chancellor's move to "clean and cheap" and a general election with many seats on majorities under 2,000. Steered the debate to keep it balanced across parties (see Notes on the record)
Richard Tice MP	Deputy Leader, Reform UK (Boston and Skegness)	Net zero is "the greatest single policy mistake of this century"; scrap the Climate Change Act; let technologies compete; energy security is national security

Panellist	Role	Position in one line
Harriet Cross MP	Conservative MP, Gordon and Buchan	Introduced by the chair as a champion of the North Sea, with a win this week on Jackdaw and a first Conservative by-election victory in the Greater Aberdeen area in over 50 years. Energy policy must be secure, abundant, cheap and clean; back the North Sea, nuclear and renewables as a full mix; replace the Climate Change Act, not leave a gap
Rt Hon Sir Robert Buckland KBE KC	Third Church Estates Commissioner, Church Commissioners for England (the Church of England is an ELUK2026 Supporting Partner)	Practical delivery over ideology; protect those least able to pay; the grid needs the ambition of earlier generations; the Church's own 2030 target was not met

What the room heard

1. Energy is an economic and national-security question, not only a climate one. Tice opened with the link between cheap energy and national wealth: "You cannot be a rich nation without cheap energy." He argued that energy use per person has fallen about 20% in 20 years while the UK now has the highest electricity prices in the developed world. Cross put it as a purpose test: energy is for growing the economy and keeping households warm, and policy has "veered" towards emissions.

2. The £2.6 billion bill voucher was dismissed from both sides. The Budget's £100 vouchers were called a "sticking plaster" by Tice, who set them against forecast price cap rises of £450 in January and £200 in April, and against about £6 billion of bad debt on electricity bills. Cross said the real issue is the policy costs sitting on bills, which no handout fixes. Buckland added that £100 per household does nothing for businesses and institutions such as churches.

3. Security of supply is the stated fear. Tice raised the risk to supply this winter and low gas storage (a few days against Germany's month, in his account). Cross argued the system leans too far towards flexible sources rather than baseload, and that the UK is shifting from secure domestic supply to imports. Buckland: it is "no good" becoming less self-sufficient in energy.

4. The grid is the binding constraint. Cross's answer to the audience's £100 question was to fix oil and gas regulation and tax, then spend public money on the grid: there are enough renewables in the system but they cannot connect, and nuclear sits on sites chosen because of the grid. Buckland called for the ambition of the era when Britain built a national grid in about ten years. Tice noted that grid connections and reliability are now on every board's list of challenges.

5. Delivery is hurt by the "all or nothing" trap. Cross's transport point: biofuel blends work in HGVs now, but a requirement for 100% later stifles progress that is possible today. She also said the US ethanol deal effectively closed the UK's last ethanol plant and increases import reliance.

6. Carbon capture split the panel, then produced the sharpest idea of the session. Tice opposed it (unproven, and caverns are better used for gas storage). Cross backed it but said it must stop being a subsidy-taker: fix the London Protocol so the UK can store other countries' carbon and make it "a revenue maker as opposed to a subsidy taker". Buckland: the Treasury needs a hard, evidenced economic case.

7. Communities carry the cost of infrastructure and get nothing back. Tice and Cross both raised pylons, substations and solar farms crossing communities with no compensation. Tice argued this is where "people power" will show up.

8. Industrial communities are the political stakes. Cross cited north-east Scotland losing about 1,000 jobs a month. Tice described the closed refineries at Thurrock, Immingham, Teesside and Grangemouth and argued the promised green jobs have not replaced them. Both linked the same skills base to nuclear, renewables and oil and gas.

The chair's view on transport fuels

Alex Wolfe leads the Renewable Transport Fuel Association, which represents about 70 companies delivering renewable fuels across marine, aviation and road, and he declared that interest on stage. His framing, in his own role as chair rather than as the panel's view:

- Transport is one of the hardest sectors to decarbonise.
- Renewable fuels can make money for the sector and build the UK's special relationship with the United States, given about 1.4 billion litres of ethanol imported.
- Tice's own constituency, around Boston, is a leading place for growing the feedstock needed for green gas and renewable fuels.

The panel's responses: Cross asked who pays, what it does to import reliance, and whether policy forces an all-or-nothing approach. Tice said let technologies compete and warned against repeating the earlier rush to diesel. Buckland said the transport detail was for other speakers, and linked the issue to the Church's need for affordable, practical energy.

Where the panel agreed

- **Cost to households and industry is the first test.** Nobody defended the current price of electricity. Buckland: the least able must not pay for the transition.
- **Energy security and self-sufficiency matter more than they did.** All three said Britain should produce more of its own energy.
- **Government should not pick winners.** Tice ("let technologies compete"), Cross (a full mix) and Buckland (avoid picking winners) said versions of the same thing.
- **The grid must be fixed before anything else scales.** Raised by all three in different forms.
- **Investors need certainty.** Cross and Buckland both said a contested policy space is bad for investment.
- **Communities need a stake in new infrastructure.**
- **Britain's emissions record is real.** Tice noted about a 50% cut over 30 years, and Cross and Buckland both warned against exporting emissions and jobs rather than removing them.

Where the panel split

Issue	Tice (Reform)	Cross (Conservative)	Buckland (Church Commissioners)
Climate Change Act	Scrap it: "the sooner it goes, the better"	Replace it; the party will not go into the election without a replacement; keep investor certainty	Did not address directly; suggested looking again at the carbon budgets approach nearer 2050
Carbon capture	Opposed: unproven, storage better used for gas	Supportive if funded and turned into an import-revenue business	Needs a hard economic case to win Treasury support
Pace of net zero	A policy mistake; cost outweighs benefit	Wrong balance; refocus on secure, abundant, cheap and clean	Support the aim, but delivery has been ideological and hit those least able to pay
Role of the state	Tax incentives, let technologies compete	Step back, make the UK attractive to invest in	Mixed economy, avoid micromanagement, some long-term state calls (for example nuclear) are right

Issue	Tice (Reform)	Cross (Conservative)	Buckland (Church Commissioners)
Heat	Heat pumps cost more and do not always work; 85% of homes have gas boilers	Not covered	Church buildings need affordable, practical heating solutions
North Sea	Supports domestic production	Drill, with regulation and tax fixed; energy profits levy a barrier	Not covered

Closing position

Asked what voters should think about at the ballot box, Cross's closing summary was the one captured in the transcript. She said people care about jobs, affordable and reliable heating, and parts of the country being de-industrialised, and argued the Conservatives want "an energy policy that works for the economy, not an energy policy that just works for the environment". She said the energy industry is strong but fragile, and that Britain should put its own production, jobs and investment first.

Numbers put on the table

All figures below were stated on stage by the named panellists or the chair, and are reproduced as spoken. They have not been independently verified by Energise Landscape or ELUK2026, who accept no responsibility for their accuracy. Anyone relying on a figure should check it against its original source.

- £2.6 billion: cost of the Budget's £100 bill vouchers (stated by the chair and Cross)
- £450 (January) and £200 (April): forecast price cap rises (stated by Tice)
- About £6 billion: bad debt on electricity bills (stated by Tice)
- About 20%: fall in UK energy use per person over 20 years (stated by Tice)
- About 50%: UK emissions reduction over 30 years (stated by Tice)
- 85% of homes, 24.5 million: homes with gas boilers (stated by Tice)
- About 30% higher: price wind developers sought in the last auction round (stated by Tice)
- Over a third of Europe's carbon storable in UK waters; about £4 billion a year of contracts; 300 companies; 50,000 jobs: carbon capture claims (stated by the chair)
- About 1.4 billion litres: ethanol imported (stated by the chair)
- About 1,000 jobs a month: lost in north-east Scotland (stated by Cross)
- £17 billion: Treasury gain Cross said would follow from removing the energy profits levy and related licences (stated by Cross)

Audience questions

If you had £100, where would it go? Buckland: a good mix, avoid picking winners, let demand decide. Tice: use tax incentives, not winner-picking, and celebrate emissions progress; energy must be abundant, affordable and reliable, and today it is none of the three. Cross: fix oil and gas regulation and tax to raise money, then spend public money on the grid.

How do we give power to the people on energy decisions? Cross: let the market and investors work it out, and make the UK attractive to invest in. Buckland: consumers should have real choice; micromanagement is

a failed concept. Tice: communities hosting infrastructure get no compensation, and people power will show up there.

Candidate commitments for the Declaration

Panel 1 produced arguments and positions rather than commitments. The table below converts the strongest areas of agreement into **proposed** Declaration commitments. The bodies named and the deadlines are our proposals for the sector to confirm, not commitments made on stage. Rows marked *contested* did not have cross-panel agreement.

#	Proposed commitment	Directed at	Proposed deadline	Panel 1 evidence
1	Publish a costed plan to cut policy costs on electricity bills and lower industrial energy costs	HM Treasury, DESNZ	Spring 2027 fiscal event	Cross, Tice, Buckland on bills and competitiveness
2	Make grid connection the first delivery priority: publish connection queue data and delivery milestones quarterly	DESNZ, NESO, Ofgem	First report within 90 days	Cross, Buckland, Tice
3	Publish an independent winter resilience and gas storage assessment	DESNZ, NESO	Before the end of Q1 2027	Tice, Cross on security of supply
4	Require a published economic case for major energy spending, and technology-neutral support where possible	HM Treasury, DESNZ	Next spending review	Buckland on Treasury tests; Tice, Cross, Buckland on no winners
5	Give investors a stable long-term framework: no repeal or major change to the Climate Change Act framework without a published replacement (*contested*)	Government and opposition parties	Before the next general election	Cross, Buckland; Tice dissents
6	Establish community benefit for areas hosting grid, substation and solar infrastructure	DESNZ, Ofgem, developers	Within 12 months	Tice, Cross
7	Open the regulatory path (London Protocol and permitting) for carbon storage to earn import revenue (*contested*)	DESNZ	Within 12 months	Cross, Buckland; Tice opposes
8	Protect skilled workforces in oil, gas and industry as a transferable base for nuclear and renewables, with published job transition data	DESNZ, DWP, industry	Within 12 months	Cross, Tice
9	Allow incremental renewable fuel blends in transport rather than all-or-nothing mandates	DfT	Next consultation round	Cross; the chair's sector view (see transport fuels)

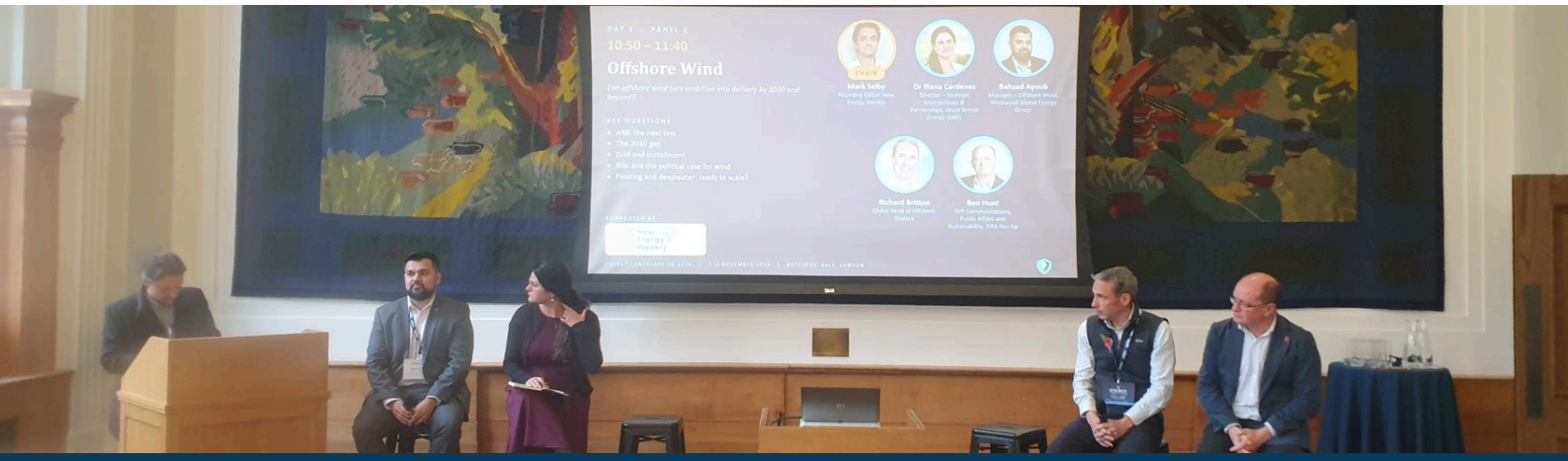
Lines worth keeping

- "You cannot be a rich nation without cheap energy." Richard Tice MP
- "Energy security is national security." Richard Tice MP
- "A revenue maker as opposed to a subsidy taker." Harriet Cross MP, on carbon capture
- "A secure, abundant, cheap and clean supply of energy." Harriet Cross MP, the test for energy policy
- "We cannot have a growing economy without cheap energy. We cannot have a secure economy without secure energy." Harriet Cross MP, closing

Notes on the record

1. **Source.** This overview is drawn from the transcript of the session audio, which is the best record available. Quotes and figures are as transcribed.
2. **Panel balance.** A Labour representative was due to join the panel but had to withdraw because of an urgent meeting. Alex Wolfe, as chair and with knowledge of Labour policy, steered the discussion to keep the debate balanced across parties. The Declaration should present Panel 1 as the views of the three panellists present, and later panels bring the industry voice.
3. **Chair's declared interest.** Alex Wolfe leads the RTFA and said so; the transport fuels material is presented as the chair's view and as a sector perspective, not as a panel consensus.
4. **Attribution.** Positions and figures belong to the individual speakers, and are not Energise Landscape or ELUK2026 positions.
5. **Proposed commitments.** The Declaration table is our synthesis for sector sign-off, and not a set of undertakings given on stage.

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DAY 1 · PANEL 2 · OVERVIEW

Offshore Wind: Delivering Britain's Greatest Clean Energy Opportunity

This session was held under the Chatham House Rule: remarks are not attributed to individuals or their organisations. Positions, claims and figures are those of the panellists and chair as stated on stage, reproduced from the session transcript. They are not the views of Energise Landscape Ltd or ELUK2026.

The headline

Panel 2 asked whether Britain's offshore wind ambition survives contact with the grid, the auction calendar and public opinion. The answer from the stage was yes, but only if three things are fixed: **a clear route to market for the next generation of projects, a grid and consenting system that delivers on time, and a public and political case that is made far better than it is today.** Allocation Round 8 (AR8) is the next test, and floating wind faces what one panellist called "a cliff edge" with no visibility of what comes after the demonstrators.

This is also the first panel in the series where the panellists named their own commitments for the Declaration when the chair asked for them at the close. Those are captured below, separately from our proposed commitments.

For the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*, Panel 2 is the delivery front: offshore wind is the largest single lever for cheap, secure and clean power, but only if projects move from award to operation.

The panel

Panellist	Role
Mark Selby (Chair)	Founding Editor, New Energy Weekly
Dr Iliana Cardenes	Director, Strategic Interventions and Partnerships, Great British Energy (GBE)
Bahzad Ayoub	Manager, Offshore Wind, Westwood Global Energy Group
Richard Britton	Global Head of Offshore, Nadara
Ben Hunt	SVP Communications, Public Affairs and Sustainability, JERA Nex bp

What the room heard

1. AR8 must deliver projects that get built, not only awards. The chair set the context: AR8's initial budget is due on 19 November with results in early 2027, bidders now need a gate to grid connection, and offshore wind will see separate clearing prices by connection location. The panel welcomed both changes. A gate to grid takes out one hurdle between award and construction, and locational prices may open up projects in costlier locations, such as in Scotland, that held back from the last round. The framework for AR8 is essentially set, and panellists looked to the consultation on later rounds to keep the framework stable and investable.

2. Annual allocation rounds should continue, and not be skipped. A panellist said annual rounds give stability to developers, the supply chain, banks and international investors, and noted that Denmark brought in a CfD after a failed zero-subsidy auction and that Germany plans a CfD fallback if it gets zero bids. Another warned that AR8's delay follows AR7's, that the auction now runs over Christmas, and that there is a risk a year gets skipped to catch up.

3. Targets matter less than a pipeline that gets built. On the 2030 gap, a panellist argued the sector should not be too hung up on missing a headline target: had the industry hit 30 GW by 2030 when that figure was first set in 2019, it would have been a huge achievement, and the UK would still be the second largest operational market outside China.

4. Floating wind faces a cliff edge. A panellist said there are about 100 MW demonstrators now, but government has given no indication of CfD pot sizes for commercial-scale projects. AR9 is on the edge of readiness, and projects consented at one to three GW from AR10 and AR11 raise phasing and infrastructure questions nobody can plan for. The single six-month ask was clarity on what AR9, AR10 and AR11 mean for floating wind, and a route to market at a price projects can actually be built for was named as the one thing that unlocks the rest.

5. The sector should tell government exactly what it needs. A panellist urged industry to galvanise and put to government a minimum value pipeline: the orders the supply chain needs in order to commit, and where and when, tied to the government's affordability and re-industrialisation priorities. The aim, they said, is "an offshore economy rather than specific projects here and there", and public sector support for such an effort is available.

6. Curtailment is a grid problem, and the grid fix is slow. Constraint costs have passed £1 billion this year, the chair said. A panellist argued curtailment shows the capacity is there but cannot get where it is needed, and welcomed the strategic approach of the SSEP and of leasing seabed together with a realistic grid connection. Another pointed to Beauly–Denny, which took ten years from application to build, and warned that ten more years of judicial reviews would leave the sector having the same conversation in a decade. Panellists agreed the public case for building grid needs making positively.

7. Data centres are potential demand, not yet proven demand. Panellists saw a possible new source of demand and a case for siting wind and data centres together to bypass the grid. One noted that offshore floating data centres are being explored in China and would raise hard consenting questions. Another said electrification will need more power whichever way demand comes.

8. Bills: the case needs an honest conversation and a better story. The chair cited the OBR's figure of an 83% rise in fossil fuel prices over the year to September, and that gas sets the wholesale price around 60% of the time. Panellists argued for honesty about how far bills can fall, for the stable long-term pricing wind offers, and for framing around energy security rather than net zero. One said the industry is "very bad at letting people know" what offshore wind already does, and is talking to itself.

9. The CfD is a contract, not a subsidy. A panellist described the CfD as a two-way contract under which developers pay back when prices run high, and urged the sector to stop calling it a subsidy.

10. Supply chain signals are real, but orders are what count. A panellist pointed to a £300 million GBE supply chain fund (open until 10 December), an industrial compact with Japan for co-investment, and plans to support major component replacement and shared foundations. They stressed that funding signals matter

but orders for projects are what give manufacturers the confidence to invest. The chair cited the £3.4 billion of supply chain investment expected from AR7's clean industry bonus, a further £200 million bonus budget in AR8 and £20.4 billion added to the National Wealth Fund and British Business Bank.

11. Political commitment is the biggest single threat. A panellist said the greatest risk to the industry, its jobs and the energy transition is the breakdown of cross-party political commitment, which would bring a cliff edge in the next five to ten years. They argued that politicians of all parties in constituencies with large renewable employers hear a different story from the national debate, and called for "real politics" back in it.

Commitments offered by the panel

Asked by the chair to name one commitment for the Declaration, panellists offered the following. These are the panel's own commitments, not our synthesis.

#	Commitment offered	Who it requires
1	Talk up the UK's position as a global offshore wind leader, including in floating, and government to keep listening to industry through every allocation round	Industry and government
2	Industry comes together through its representative bodies to put a numbers-backed minimum pipeline message to government, with public sector support offered	Industry, with public sector support
3	Get the public case out and win public buy-in, being realistic about programme timelines; bring industrial investors on board	Industry
4	Rebuild cross-party political commitment to the transition and bring "real politics" back into the debate	Political parties, industry advocacy

Where the views differed

Issue	Range of views
Targets	Not to be over-focused on missing a headline GW figure, versus the view that floating wind targets are not credible without financial support
Floating wind readiness	Commercial scale needs a route to market now, and deep water is years behind in deployment
Data centres	A potential demand source and co-location opportunity, but not yet confirmed demand
Constraint costs	A negative headline, or a symptom of the transition that shows capacity exists
Transmission	HVDC links seen as key, but a strategic plan has to come before more links

Audience question

A delegate asked whether a major transmission link due online in 2029 would significantly reduce wind curtailment, and whether to double down on an HVDC network. Panellists said constraint costs are a symptom of the transition, not a reason to stop; that there was no coordinated infrastructure plan until now, so strategic planning through the SSEP is welcome and has to deliver actual results; that HVDC offshore links are a key part of the answer, including across Europe; and that developers will differ in what they want, so solutions have to be strategic and get power where it is needed.

Numbers put on the table

All figures below were stated on stage by panellists or the chair, and are reproduced as spoken. They have not been independently verified by Energise Landscape or ELUK2026, who accept no responsibility for their accuracy. Anyone relying on a figure should check it against its original source.

- 19 November: date of AR8's initial budget notice; results in early 2027 (stated by the chair)
- Just over 30 GW by 2030 against a 43 GW target, with at least 5 GW needed each year (stated by the chair, citing a 2026 industry projection)
- 30 GW by 2030: the industry's own target set in 2019 (stated by a panellist)
- About 100 MW: size of floating wind demonstrators now in the game (stated by a panellist)
- Projects consented at one to three GW from AR10 and AR11 (stated by a panellist)
- Over £1 billion: constraint costs this year (stated by the chair)
- Ten years: Beauly–Denny, from planning application to being built (stated by a panellist)
- 83%: rise in fossil fuel prices in the year to September, per the OBR (stated by the chair)
- About 60%: share of the time gas sets the wholesale price (stated by the chair)
- About 20%: offshore wind's share of UK demand (stated by a panellist)
- £3.4 billion: expected supply chain investment from AR7's clean industry bonus; £200 million: AR8 bonus budget; £300 million: GBE supply chain fund; £20.4 billion: added to the National Wealth Fund and British Business Bank (all stated by the chair or a panellist)

Candidate commitments for the Declaration

The table below converts the strongest areas of agreement into **proposed** Declaration commitments, building on what the panel offered. The bodies named and the deadlines are our proposals for the sector to confirm, not undertakings given on stage.

#	Proposed commitment	Directed at	Proposed deadline	Panel 2 evidence
1	Hold allocation rounds on a fixed, published annual calendar with no skipped rounds, and publish an indicative timetable for AR9 to AR11	DESNZ	Within 6 months	Chair and panellists on annual rounds and delay risk
2	Publish indicative CfD pot sizes and a route to market for floating and deep water wind from AR9	DESNZ	Within 6 months	Panellists on the floating wind cliff edge
3	Industry publishes a minimum value pipeline for the supply chain, backed by numbers, with public sector support	Industry representative bodies, GBE	Within 6 months	Panellists; commitment offered 2
4	Deliver the SSEP on time and tie seabed leasing to a realistic grid connection, with quarterly progress reporting	DESNZ, NESO, Crown Estate	Publish timeline within 90 days	Panellists on SSEP and grid
5	Set a consenting timetable that avoids decade-long delays while protecting communities	DESNZ, planning bodies	Within 12 months	Panellists on Beauly–Denny and judicial review
6	Explain the CfD publicly as a two-way contract, and run a joint industry and government communications effort on what offshore wind delivers for bills and security	Industry, DESNZ	Launch within 6 months	Panellists on communication; commitment offered 3

#	Proposed commitment	Directed at	Proposed deadline	Panel 2 evidence
7	Convert supply chain funding into orders: publish how public funds and the clean industry bonus link to project pipelines and factories	GBE, DESNZ	Report by mid-2027	Panellists; chair on funding
8	Commit across parties to a stable long-term offshore wind framework	All parties, industry advocacy	Before the next general election	Panellists on political risk; commitment offered 4
9	Enable co-location of data centres and offshore wind to reduce grid pressure	DESNZ, Ofgem	Within 12 months	Panellists on data centres

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DAY 1 · PANEL 3 · OVERVIEW

Grid Transformation and Energy System Integration: Building the Infrastructure Britain's Clean Energy Future Demands

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The headline

Panel 3 put the grid at the centre of the energy trilemma. The panel's verdict was blunt: Britain was slow to prepare for a distributed, electrified system, and the cost of that delay now shows up as stalled connections, volatile prices and businesses that cannot plan. **The word the panel kept returning to was slippage.** Missed dates, long consenting times and uncertain connection offers hurt investors and industrial users more than bad news does.

The panel agreed that more cable is essential but not enough. Building smarter means strategic planning, shorter consenting, open and standardised data, flexible demand, and keeping the skilled workforce needed to deliver. Several panellists argued that **stable energy matters more to industry than cheap energy**, and closed on a call for a long-term, cross-party energy strategy.

For the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*, Panel 3 shows that the grid is where cost, security and decarbonisation meet. Without faster, more transparent delivery of network capacity, none of the three fronts can be held.

The panel

Panellist	Role
Trevor Hutchings (Chair)	Chief Executive, Renewable Energy Association (REA)
Richard Brown	Commercial Director, Osmose Europe
Graham Robinson	Chief Technology Officer, Smart DCC
Stephen Todd	Head of Partnerships, e2 Energy Partners

What the room heard

1. The grid was built for a different system, and connection is now the constraint. The chair set the scene: an energy system of few large assets has become one of many thousands of distributed generators, with electrification adding demand, and the network was slow to respond. The connection queue once held around 700 GW of applications against a peak demand of about 45 GW, and reform is moving the queue from first come, first served towards projects that are ready and strategically necessary. Delay remains, even with an estimated £70 to £100 billion of grid investment under way.

2. Great British Grid is a catalyst with questions attached. Panellists saw it as a possible disruptor intended to unlock connections, but said it would need a short period to prove itself. They raised a concern that if it enters network construction alongside existing transmission companies it could dilute the existing workforce instead of adding to it, and might not speed things up in the next four to five years. Another welcomed that government has identified the problem, noted the plans so far are thin on detail, and said they would reserve judgement until they see them.

3. Build smarter, not only more. A panellist said the 2030 targets will not be met by building network alone. They called for strategic, top-down network planning in place of project-by-project decisions, and for transmission planning and consenting times, currently around 14 to 15 years, to be halved. Another said the UK must invest well ahead of demand, as the demand is coming, while still protecting customers from the cost.

4. Slippage is the killer. Panellists said accurate connection dates matter because people can handle bad news better than uncertainty. One suggested a phased approach: a connection in three to five years, accepting occasional constraints, may be better than waiting 15. An industrial-side panellist said a transition must be easy for the people paying the bills, and that every delay makes moving to renewables more troublesome for them.

5. Transparency and data are as important as copper. A panellist called for much greater transparency from the system operator, saying the data exists but is not released and that problems tend to surface late. Another described the scale of smart metering data, about 40 million devices, and the need to make it available to the right people in the right way. Behind-the-meter assets such as EV chargers, plug-in solar and home batteries are often not visible to the network, which makes forecasting harder. Data standards differ and data is tied to different identifiers, so industry efforts to share data need standardisation and interoperability to work.

6. Stability matters more than the lowest price. A panellist argued that businesses cannot plan more than about three months ahead because energy prices swing, and that manufacturers could cope with 20p to 25p power if it stayed there. They said wholesale energy is about 40% of a business bill, that gas still drives the volatility, and that hybrids of wind, solar and storage help. Others said renewables already lower bills in places, but the sector is nowhere near decoupling from gas prices.

7. Private wire and co-location are real but not a full answer. The chair noted a large biomass operator announcing a deal to put a data centre on its site by private wire. Panellists said data centres are exposed to pass-through costs, so private wire is attractive, but industrial users still need the grid as a back-up because an outage can be terminal. Small modular reactors were called a potential game changer but about 15 years away. One panellist saw distribution networks facing a risk of large demand bypassing the electricity grid for gas, although high gas prices have cooled interest in gas-fired combined heat and power.

8. The consumer is moving from passive to active. A panellist said that for the first time consumers can control their bills through heat pumps, solar, batteries, insulation, time-of-use tariffs and EVs. Smart meters are now the gateway to those tariffs. The challenge is a fair transition: not everyone can invest or has the interest or knowledge to, and the panel said that no one should be left behind. They noted smart metering faces a limited installer workforce and a move from older mobile networks to 4G.

9. Flexibility works, but complexity is slowing it. A panellist said demand flexibility has been proven, but a consumer with a battery, heat pump and solar from different suppliers faces interoperability problems that

slow industrialisation of flexibility. Data sharing and automation, including AI to make it simple for the consumer, could allow a more cost-effective grid upgrade because less capacity is needed.

10. People and skills are the critical asset. A panellist said the sector should invest now in training the people who will build and refurbish the network, and that AI cannot yet do the work on the ground.

Audience questions

What needs to happen to move bills away from fossil fuel prices? A panellist said marginal cost pricing is the system the market runs on and nobody has yet offered a better workable alternative, so the answer is to build out clean capacity so gas sets the price less often. They added that transition brings pain, that constraint payments are a symptom of that, and that the sector should look beyond wind and solar to non-intermittent options such as geothermal and tidal. The chair added biomethane, biomass, interconnectors, nuclear and falling storage costs.

Would decoupling gas and electricity prices deter investment, as government argues? A panellist said they do not buy the argument: the same capital is needed to develop offshore oil and gas as wind, so the investment is being made either way, and decoupling removes the link to volatile energy costs.

Why not use co-location of data centres and power at generation sites as an interim solution? A panellist called it common sense and said there is customer demand for it. Others noted that local authorities are starting to use aggregated tenant consumption data to decide on solar and storage, and that larger co-located installations are rarely seen.

Could CfDs be redesigned to reward grid optimisation, storage and behind-the-meter generation? Panellists said they were in violent agreement that CfDs and connection-queue priority should be viewed as levers that encourage complementary benefits, including for storage and for data centres that provide system services, while being open to the risk of driving unintended behaviour.

How can factories, schools and hospitals gain confidence in the energy transition rather than self-generating off-grid? A panellist said decoupling private energy markets from the gas price and being transparent that the commodity element of a bill is lower with renewables, while pass-through charges cause the trouble, would build confidence. They said a joined-up message is needed, and that net zero lost support when it was framed only as saving the planet instead of the wider benefits of renewables.

Closing messages from the panel

In closing, the chair invited key messages for industry and government.

#	Message	Who it requires
1	Decisions must be made now to see networks through to 2030 and beyond; the years to 2030 will be very busy for transmission and distribution operators	Government, network operators
2	Invest now in training people to build and refurbish the network	Government, industry
3	Scale demand flexibility by sharing data and ensuring consumer devices interoperate, which also makes the grid upgrade cheaper	Industry, regulators
4	Adopt an apolitical energy strategy for the next 20 years, so a change of government does not send the system back to square one	All parties

Where the views differed

Issue	Range of views
Great British Grid	A catalyst to unlock connections, versus a risk of diluting the existing workforce and not speeding delivery in the next four to five years
Marginal cost pricing	The only workable system so far, versus the case for decoupling bills from gas
Private wire and co-location	Attractive, particularly for data centres, versus the need for grid back-up and resilience
Nuclear	SMRs as a potential game changer, versus a view that they are about 15 years away
Why decouple	Argument that decoupling deters investment, versus the view that the same capital is spent either way

Numbers put on the table

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- About 700 GW: peak applications in the connection queue; about 45 GW: peak demand (stated by the chair)
- £70 to £100 billion: investment going into grid upgrades (stated by the chair)
- 14 to 15 years: current transmission planning and consenting times, to be halved (stated by a panellist)
- Three to five years versus 15 years: connection timeframes discussed for phased connections (stated by a panellist)
- About 40 million: smart metering devices (stated by a panellist)
- 20p to 25p: price manufacturers could cope with if stable (stated by a panellist)
- About 40%: wholesale energy's share of a business bill (stated by a panellist)
- About three months: the horizon over which businesses can plan at current volatility (stated by a panellist)
- About 15 years: time to the first SMR (stated by a panellist)

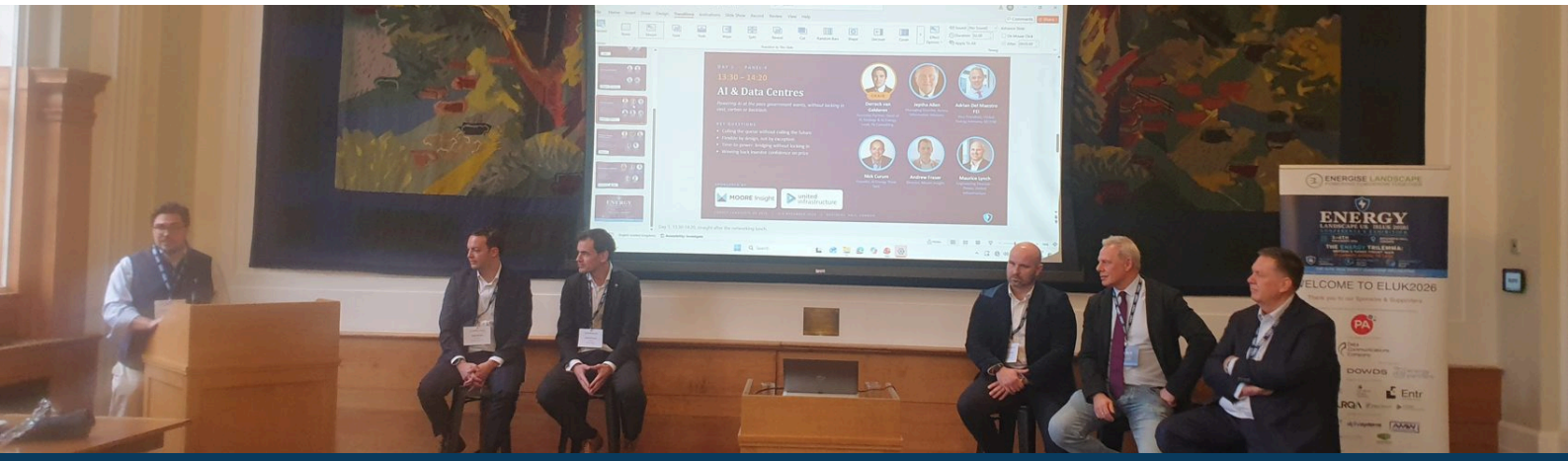
Candidate commitments for the Declaration

The table below converts the strongest areas of agreement into **proposed** Declaration commitments. The bodies named and the deadlines are our proposals for the sector to confirm, not undertakings given on stage.

#	Proposed commitment	Directed at	Proposed deadline	Panel 3 evidence
1	Give firm, accurate connection dates for every project in the reformed queue and report slippage publicly each quarter	NESO, network operators, Ofgem	First report within 90 days	Panellists on slippage and accurate dates
2	Halve transmission planning and consenting times, from about 14 to 15 years towards 7, with a published roadmap	DESNZ, planning bodies	Roadmap within 6 months	Panellist on consenting reform

#	Proposed commitment	Directed at	Proposed deadline	Panel 3 evidence
3	Publish a strategic, top-down network plan with delivery milestones, and commit to invest ahead of demand	DESNZ, NESO	Within 6 months	Panellists on strategic planning
4	Set out the role and detail of Great British Grid, how it works with existing network companies, and its workforce plan	DESNZ	Within 90 days	Panellists on workforce dilution and thin detail
5	Offer phased or interim connections within three to five years, accepting occasional constraints, where a full connection would take much longer	NESO, Ofgem	Pilot within 6 months	Panellist on phased connections
6	Publish system and constraint data openly and adopt cross-industry data standards for behind-the-meter assets	NESO, Ofgem, DESNZ, industry	Standards roadmap within 6 months	Panellists on transparency and data
7	Extend CfD and connection-queue levers to reward storage, flexibility and data centres that provide system services	DESNZ, NESO	In the next round consultation	Panellists on CfD design
8	Enable co-location of data centres and demand with generation, with resilience safeguards	DESNZ, Ofgem	Within 12 months	Panellists on private wire and co-location
9	Publish a network workforce and training plan to deliver the build programme	DESNZ, skills bodies, industry	Within 6 months	Panellists on skills and workforce
10	Ensure consumer devices interoperate across flexibility providers, and protect households that cannot invest from being left behind	Ofgem, industry	Within 12 months	Panellists on flexibility and fair transition
11	Agree a cross-party, 20-year energy strategy	All parties	Before the next general election	Panellist closing message

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DAY 1 · PANEL 4 · OVERVIEW

AI and Data Centres: Powering Britain's Digital Future Without Overloading the Grid

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The headline

Panel 4 tested whether Britain can host the AI economy without breaking its grid. The panel agreed that data centres are here to stay, but that **the demand queue is full of speculation, and the real constraints are access to power, community consent and a planning system that cannot keep pace.** Power access was the story of the last 12 to 18 months. Several panellists argued that community engagement is now the next make-or-break issue for developers.

The panel's practical answers were to co-locate data centres with power, use bridging generation where the grid cannot deliver, give communities real benefits such as heat and flexibility services, and hold an honest conversation with the public about trade-offs. On government, the message was consistent: **clear criteria, firm and monitored connection dates, and a planning system that delivers.**

For the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*, Panel 4 shows the new demand pressing on all three fronts at once: cost and security of supply on the grid, and decarbonisation where bridging power relies on gas.

The panel

Panellist	Role
Derreck van Gelderen (Chair)	Associate Partner, Head of AI Strategy and AI Energy Lead, PA Consulting
Jeptha Allen	Managing Director, Access Information Advisory
Adrian Del Maestro FEI	Vice President, Global Energy Advisory, AECOM
Nick Curum	Founder, AI Energy Think Tank
Andrew Fraser	Director, Moore Insight
Maurice Lynch	Engineering Director, Power, United Infrastructure

What the room heard

1. Is the demand real? The chair noted that only about 30% of UK businesses are adopting AI today and that some investors are moving away from AI stocks, and asked how much of the data centre queue would survive a correction. Panellists said the queue is backed by large technology companies and has grown very fast, but that nobody knows how much of it is genuine. They said the official demand forecast is lower than the queue implies, and that where demand lands is unknown. They pointed to a geopolitical race on AI, with data centres now discussed as anchors for industrial clusters and the government's re-industrialisation agenda.

2. Speculation in the queue is a recognised problem. A panellist said the government has a target of six gigawatts, and that a three gigawatt substation announced the day before could eventually feed AI data centres. They noted that the regulator has consulted on commitment fees for developers to remove speculative applications, and that some developers are trying to flip land with a grid connection. Another said that on a recent check, 315 sites had requested 73 GW, which is around 58% to 60% of all grid connections being requested, and asked how many are real.

3. Developers will build wherever they can find power. The chair observed that the Budget allowed on-site generation as a route to access the grid and that the regulator has offered voluntary flexibility for early connections. A panellist described projects held up for years by power delays, for which fuel cells running on gas offered a bridge: higher capital cost, cheaper to operate, and quick to deploy. Network companies saw this as a two to three year bridge and not a long-term solution, while pension fund money is arriving and favours speed. Another panellist said they have customers who would "bite my hand off" for powered land, where pod-based, liquid-cooled data centres can be up and running quickly.

4. The grid has fallen behind, and projects have paused as a result. A panellist said upgrading the grid is a bill of close to £100 billion, and that after a large US commitment to invest in UK data centres, some projects were paused when developers reached the site and found no way to plug in. Building the data centre itself is comparatively easy next to an oil and gas project; the missing piece is the connection.

5. Co-location is the interim answer. Panellists argued that co-locating data centres with power would take pressure off the grid, and that if demand is 58% of requested connections, the grid is unlikely to catch up quickly. They said that enterprise customers should also revisit the "five nines" resilience that data centre contracts demand, and be willing to accept something less where that frees up capacity.

6. Nuclear is a long-term option, and gas has a cost. The chair asked about nuclear. A panellist said that in the US developers without a grid connection have turned to gas turbines or gas fuel cells, which are reliable baseload but not clean, a debate that will reach the UK and Europe. Small modular reactors are not expected before the early 2030s at the earliest and need standardising, and co-locating data centres near nuclear sites may not be viable. A single supplier in the fuel cell market was also noted as a supply chain risk. The Nordic example of clean baseload hydro, and a large technology company buying a share of a Finnish nuclear plant's output, were described as isolated cases.

7. What makes a town want a data centre? Panellists said heat offtake and district heating are the easy win where location allows, along with flexibility and balancing services. Others suggested discounted power, heat for glasshouses and cheap broadband. A panellist cited a survey across the UK and Germany finding residents are more likely to back data centres that use renewable power and offer heat to locals. Another said water concerns are overstated for new closed-loop cooling designs, although coverage tends to show the opposite.

8. Engage early, and be honest about jobs and trade-offs. Panellists said developers now find community engagement more important than power access, and that each community is different, with no cookie-cutter approach. Some developers sit down with communities from day one. On jobs, a panellist said construction employs thousands for three to ten years but a running data centre needs only about 50 to 100 people, so the jobs argument is weaker than it sounds. Visceral opposition to AI is being conflated with opposition to data centres. A panellist argued the industry needs an honest conversation with residents: they want AI-based services such as health screening, and that requires data centres. They warned that a

technology provider had told government it has about 12 months to get the message across or face US-style resistance, and that community backlash can become political backlash.

9. Is government doing enough? Panellists said the Budget's announcement of strategic data centres lacked criteria and detail, so businesses cannot build business cases or know whether they qualify. They asked for prescriptive clarity, for firm connection timetables that are monitored, and for action against speculative land-flipping. One said that any connection delay knocks out the finance case by a year for each year of delay. They also said local planning authorities need government instruction and commitment to deliver without unnecessary delay, and that the UK should aim to be a leading technology nation.

Audience questions

Is there real appetite for small data centres in the 10 to 50 MW range? A panellist said there is huge appetite for sites of 10 to 30 MW, which are easier to connect, and that they know two developers keen on those connections.

Are we building today's energy infrastructure around today's compute assumptions? Panellists said interim solutions are needed now, with nuclear following in 15 to 20 years. One said rack power densities are rising fast and about to roughly double by the end of next year. Another said investors are nervous about 20-year power infrastructure when chips may change, and that the answer is whole-systems thinking: data centres in industrial clusters, providing heat, managing load flexibly with AI and exporting energy to the grid.

What would unlock renewable energy and private wire for data centres? A panellist said private wire is the solution because grid energy is expensive, and pointed to schemes in development beside industrial sites with their own generation. Another said landowners with underused sites and grid connections should consider electrification, whether data centres, EV charging hubs or industrial electrification.

How do we unblock the planning system, and how can community benefit be funded? A questioner pointed to Section 106 agreements and the Community Infrastructure Levy as ways to channel developer money into local infrastructure, even where jobs are limited. A panellist said planning bureaucracy is hard to escape and that long-delayed oil and gas projects show the same risk now facing data centres once connections are solved. They added that renewables are located mostly in Scotland while demand is in the south, so power and demand need bringing closer, and that business rates changes are worth watching.

Do developers need clarity on permissions and charges after the Budget? A questioner said businesses need greater clarity on permissions and expected charges, which the panel's government messages echoed.

Closing messages from the panel

The chair asked each panellist whether government is doing enough and what one thing they would like to see in place before next year's summit.

#	Message	Who it requires
1	Set clear, prescriptive criteria for strategic data centres so industry knows whether it qualifies	Government
2	Provide connection timetables that are firm and monitored, because delays undermine business cases	Government, network operators
3	Deal with speculation in the pipeline, including land-flipping	Government, regulator
4	Back local planning authorities with government commitment so they deliver without delay	Government, local authorities
5	Show next year what successful data centre projects looked like and what made them succeed	Industry

Where the views differed

Issue	Range of views
Size of real demand	A large queue backed by major companies, versus doubt that much of it is genuine
Gas as a bridge	Fast and practical where the grid cannot deliver, versus emissions, supplier concentration and a short-term role only
Nuclear for data centres	A long-term option, versus doubts about viability and timing before the early 2030s
Resilience	Customers should accept less than five nines, versus the reliability enterprise users expect
Jobs argument	Skilled local jobs as a community selling point, versus few permanent roles per site

Numbers put on the table

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- About 30%: UK businesses adopting AI today (stated by the chair)
- 6 GW: government target for data centres; 3 GW: substation announced the day before (stated by a panellist)
- 315 sites requesting 73 GW, around 58% to 60% of grid connections requested (stated by a panellist)
- Close to £100 billion: cost of upgrading the grid (stated by a panellist)
- About £100 billion: US investment commitment, with some projects later paused (stated by a panellist)
- Fuel cells: about three times the capital cost, with lower running cost (stated by a panellist)
- Early 2030s at the earliest: first small modular reactors; about 15 years: nuclear process (stated by a panellist and the chair)
- 50 to 100 people: staff to run a data centre; three to ten years: construction period (stated by a panellist)
- About 12 months: warning from a technology provider to government on public messaging (stated by a panellist)
- 10 to 30 MW: size of small data centres in demand (stated by a panellist)

Candidate commitments for the Declaration

The table below converts the strongest areas of agreement into **proposed** Declaration commitments. The bodies named and the deadlines are our proposals for the sector to confirm, not undertakings given on stage.

#	Proposed commitment	Directed at	Proposed deadline	Panel 4 evidence
1	Publish clear criteria and a process for strategic data centres	DESNZ, DSIT	Within 90 days	Panellists on Budget detail
2	Give firm, monitored connection timetables for large demand connections, with public reporting	NESO, network operators, Ofgem	First report within 90 days	Panellists on connection certainty

#	Proposed commitment	Directed at	Proposed deadline	Panel 4 evidence
3	Clear speculative applications from the queue through commitment fees and readiness tests	Ofgem, NESO	Conclude consultation within 6 months	Panellists on speculation
4	Set rules for bridging power such as on-site gas and fuel cells, with time limits and a route to clean power	DESNZ, Ofgem, regulators	Within 6 months	Panellists on gas as a bridge
5	Enable co-location and private wire for data centres, with resilience safeguards	DESNZ, Ofgem	Within 12 months	Panellists on co-location and powered land
6	Plan data centres into industrial clusters and heat networks as part of whole-system planning	DESNZ, DSIT, local authorities	Within 12 months	Panellists on whole-systems thinking
7	Set a community benefit standard: early engagement, heat offtake, flexibility services and developer contributions	MHCLG, industry	Within 12 months	Panellists on community engagement
8	Back local planning authorities with a delivery commitment and timetable for data centre decisions	MHCLG	Within 6 months	Panellists and audience on planning
9	Data centre operators offer demand flexibility and system services, and enterprise customers review resilience requirements	Industry, NESO	Within 12 months	Panellists on five nines and flexibility
10	Launch an honest public information effort on water, jobs and trade-offs	Industry, government	Within 6 months	Panellists on education
11	Report back next year with case studies of successful data centre projects	Industry	At next year's summit	Panellist closing message

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DAY 1 · PANEL 5 · OVERVIEW

Homes as Energy Infrastructure: Why Britain's Clean Power Ambition Will Be Won or Lost in 29 Million Homes

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The headline

Panel 5 brought the energy trilemma into the home, where cost lands on the household budget. The panel's case was that homes are not just a place to cut carbon but a flexible asset for the whole system: heat that can be shifted, batteries and solar that can balance the grid, and data that can prove what works. **The obstacles were not technology. They were finance, mixed policy signals, the quality of installation and the fact that most consumers cannot yet engage easily with the tools available.**

Three themes ran through the session. First, **policy should measure outcomes**, such as pounds saved and kilograms of carbon cut, not inputs. Second, **homes with low-carbon technology should be recognised in valuations and mortgage lending**, so the market rewards them. Third, **government must be consistent and clear**, because developers, installers and lenders cannot plan against changing messages.

For the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*, Panel 5 is the household front: the place where affordability is felt first and where clean power ambition either reaches people or stalls.

The panel

Panellist	Role
Mark Livingstone (Chair)	Partner, Bright Futures
Rebecca Harrison-Vickers	Director of Residential New Build Transformation, E.ON
James Ringrow	Director of Strategy, Data Communications Company (DCC)
Andy Sutton	Co-Founder, Sero; previously Executive Director and Chief Innovation Officer

What the room heard

1. The Budget offered little detail for homes. The chair observed that few energy announcements stood out in the speech. Panellists said the shift of the gas standing charge towards variable charges carries long-term risks as well as short-term benefits, and that a new loan scheme for homes sounds promising but has no detail yet. One said it is unlikely to close the funding gap unless it arrives with substance, and that scaling up the supply chain with public money while pulling support from the heating side sends mixed signals.

2. The policy tools are not ready. A panellist said the Home Energy Model is a good physics model for homes but is not yet in place, and that the financial mechanisms to support the Future Homes Standard and the much larger stock of existing homes are missing. Solar and battery uptake is growing because consumers want it, but heat is lagging. They argued it is unrealistic to spend £1.5 trillion to cut housing and heating demand dramatically, so the aim should be to take the edge off demand and let homes shift it. "How we shift" may matter more than how we generate.

3. Smart tariffs exist, but few households use them. A panellist cited an industry report finding that about 3% of households are on smart tariffs. Panellists said the question is no longer whether suppliers can design tariffs but how to get people on them safely and easily, including households on prepayment meters, who could be rewarded with credit applied directly to the meter. Another said consumers are not investors managing their own portfolios, and it is crazy that a household cannot run its EV, battery, hot water store, heat pump and solar from one app.

4. New homes: standards are coming, but the market is under strain. The Future Homes Standard is expected in a year or two. A panellist said new build volumes are down about 30% and developers are under pressure, but that those who adopt the standard early will benefit. Developers are asking for help to make homes more sustainable, and for propositions that work for two-bedroom homes as well as five-bedroom ones. Another said the standard is the lowest in the UK compared with Scotland and Wales, so if it is already the minimum, the problem is not the standard.

5. Valuation and finance can move the market faster than subsidy. Panellists said property passports or logbooks, and EPC reform, would help buyers understand what they are buying, and that surveyors, valuers and agents can start this now. If lenders factored the future cost of electrifying a home into affordability calculations, buyers would start pricing it. A panellist said work with the market suggested the larger effect is a "brown discount" on homes with fossil fuel heating, more than a green premium, and compared it to how double glazing became standard in the 1980s once buyers marked down homes without it.

6. Measure what happens in the home. A panellist described Smart Energy Enabled Thermal Efficiency Ratings, which use in-home sensors to show whether temperature and energy use deliver real outcomes. They said a trial found that in about 70% of homes measured performance differed from forecast before and after retrofit, and that households using measured data could save around £12,500 in retrofit cost. Another panellist said the existing smart metering network could carry temperature and humidity data to support this, reusing what is already in homes.

7. Heat pumps: a political football, but the physics is clear. A panellist said heat pumps deliver far more heat per unit of energy than any alternative, and that for most homes electrification will mean a heat pump. Others asked whether the policy is too ambitious or whether more choice, such as hybrids, biomethane or other routes used in parts of Europe, would help where a heat pump does not fit. One said the policy problem is that people will keep looking for reasons to delay, and that a clear policy statement is needed. A panellist added that solutions for renters, such as plug-in solar and storage, must be part of the answer.

8. Behaviour, handover and installation quality decide whether technology works. A panellist described a large trial of heat pump households in which some people given the chance to reduce heating use did not know how, which shows that basic communication matters. Panellists agreed that install quality is variable, that much of the criticism of heat pumps comes from poor installation and not from the technology, and that independent verification, by inspection or by performance monitoring, would protect both consumers and the industry's reputation.

Audience questions

Why is changing energy supplier still slow and confusing? Panellists said the switching process has improved a lot, though gas and electricity can still move at different speeds. They said innovation is returning to the retail market after the energy crisis, and that the challenge is making sure people know which propositions exist and can choose the right one.

Do we know what the UK makes, and why do we not back UK-made heating innovation? A questioner raised a UK-made direct electric heating product. Panellists said direct electric is less efficient than a heat pump but can suit properties where a heat pump does not fit, and that UK innovators can grow within the right framework. One argued that outcomes-based policy, such as the ability to heat a home affordably for a set monthly cost, would let different solutions compete on results.

How do we get handover and commissioning right? A questioner noted that heat pumps work well, including in existing homes without solar or batteries and, with a grant, at competitive running costs. Panellists said installer networks should work with sales teams to educate homeowners at handover, that install quality is a national weakness, and that independent validation is needed. They noted stories of solar installed but not connected damage trust in the technology, and that flexible assets need consistent visibility across the system.

Why are district heat networks built for incinerators and data centres not connected to new homes? A questioner said infrastructure built for heat was not linked to nearby housing. Panellists said continuity of infrastructure is a real gap, that heat networks are hard to make viable until deployed at scale, and that lawyers and insurers often require large back-up systems, which erodes the case.

Asks from the panel

The panellists were asked at the start for one thing they would change, and at the close for a comment or commitment government should make.

#	Ask	Who it requires
1	Recognise low-carbon technology in property value and finance, so that good tech lifts the value of a home	Lenders, valuers, government
2	Make better use of data, and reuse the capabilities already in place instead of building new ones	Government, industry
3	Move to outcomes-based, measured policy, with measures in pounds and kilograms of carbon	Government
4	Keep government messaging consistent	Government
5	Stay the course and keep pushing	Government
6	Define the 2050 end state for the energy system and homes, then work back to the steps needed now	Government

Where the views differed

Issue	Range of views
Pace of heating policy	Policy is too ambitious and needs more time or choice, versus the case that the standard is already the lowest in the UK and the answer is to get on with it
Heat pumps or choice	Electrification is the direction and heat pumps suit most homes, versus calls for hybrids, biomethane and direct electric options where a heat pump does not fit

Issue	Range of views
Why tariffs have low uptake	Consumers need education, versus the product design, apps and interoperability make it too hard
What moves the market	A green premium in valuations, versus a larger discount for homes still on fossil fuels
The new homes loan scheme	Promising, versus too light on detail to close the gap

Numbers put on the table

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- About 3%: households on smart tariffs (stated by a panellist, citing an industry report)
- About 30%: fall in new homes being built (stated by a panellist)
- £1.5 trillion: cost described as unrealistic for dramatically cutting housing and heating demand (stated by a panellist)
- About 70%: homes in a trial where measured performance differed from forecast before and after retrofit (stated by a panellist)
- About £12,500: potential retrofit saving for households using measured data (stated by a panellist)
- About 2,000: households in a heat pump demand response trial (stated by a panellist)
- A year or two: expected time to the Future Homes Standard (stated by a panellist)
- £25 a month: illustrative affordable heating outcome (stated by a panellist)

Candidate commitments for the Declaration

The table below converts the strongest areas of agreement into **proposed** Declaration commitments. The bodies named and the deadlines are our proposals for the sector to confirm, not undertakings given on stage.

#	Proposed commitment	Directed at	Proposed deadline	Panel 5 evidence
1	Publish the detail and timetable of the new homes loan scheme and the finance mechanisms for retrofit	HM Treasury, DESNZ	Within 90 days	Panellists on Budget detail
2	Publish the delivery timetable for the Home Energy Model and the Future Homes Standard so developers and the supply chain can plan	MHCLG, DESNZ	Within 6 months	Panellists on readiness and developers
3	Adopt outcomes-based, measured performance, such as in-home sensor ratings, in retrofit funding, with a pilot	DESNZ	Pilot within 12 months	Panellists on measured outcomes
4	Introduce property passports and EPC reform, and ask lenders to factor future energy costs into affordability, so low-carbon homes are valued properly	MHCLG, lenders, valuers	Within 12 months	Panellists on finance and valuation
5	Make smart tariffs easy to adopt: interoperable apps, and just-transition protections for prepayment and vulnerable households	Ofgem, DCC, suppliers	Within 12 months	Panellists and audience on tariffs and apps

#	Proposed commitment	Directed at	Proposed deadline	Panel 5 evidence
6	Set an installation quality and handover standard with independent verification, including through performance data	DESNZ, Ofgem, trade bodies	Within 12 months	Panellists and audience on install quality
7	Issue a clear, stable heating policy statement, including routes for homes where a heat pump is unsuitable	DESNZ	Within 6 months	Panellists on pace and choice
8	Create solutions for renters, including rules for plug-in solar and storage	DESNZ, MHCLG	Within 12 months	Panellist on renters
9	Require new developments to assess connection to nearby heat sources such as incinerators and data centres	MHCLG, DESNZ	Within 12 months	Audience question on district heat
10	Publish a 2050 end state for homes and energy with milestones worked back from it, and keep government messaging consistent	DESNZ, MHCLG	Within 6 months	Panellists' closing messages

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DAY 1 · CLOSING DEBATE · OVERVIEW

From Debate to Delivery: What Must the UK Energy Sector Do Differently — Starting Now?

Positions, claims and figures in this overview are those of the named speakers and chair as stated on stage, reproduced from the session transcript. They are not the views of Energise Landscape Ltd or ELUK2026, and have not been independently verified.

The headline

The Day 1 closing debate set out to turn a day of diagnosis into action. The chair's brief was to agree five practical, owned actions to carry into Day 2's closing debate, where they will help shape the ELUK2026 Energy Leadership Declaration. The panel produced six.

The diagnosis was consistent across all four panellists: **the UK's problem is not a shortage of technology, capital or ambition. It is a failure to plan and deliver the energy system as a whole.** Dr Sarah Kimpton named silos as the primary failure. Prof. Will Drury named the gap between a good idea and proving it works in a real environment. Jonathan Minnitt named the habit of treating every project as first-of-a-kind. David Weatherall named buildings whose energy technology does not perform as designed.

The chair closed on the day's theme: **whole-systems thinking underpins everything, and communication and education were the thread through every session.**

The panel

Panellist	Role
Poppy Airey (Chair)	Market Analyst, Xoserve
Prof. Will Drury	CEO, Power Networks Demonstration Centre (PNDC), University of Strathclyde
Jonathan Minnitt	Vice President Business Development, Entr, part of Aker Solutions
Dr Sarah Kimpton	Vice President, UK and Ireland, Energy Systems, DNV
David Weatherall	Head of Policy, BRE

The single systemic failure, as each panellist saw it

Panellist	Failure they would fix first
Prof. Will Drury	The gap between having something great and proving it works in a real environment. He called for de-risked deployment at pace, and warned against rollouts that cause failures such as a city losing power.
Dr Sarah Kimpton	Developing parts of the energy system in silos and not as a whole system.
Jonathan Minnitt	Treating every project as first-of-a-kind and so approaching it with maximum risk aversion; and failing to integrate technologies that work well on their own.
David Weatherall	Ensuring energy technology in buildings performs as well as it was designed to.

What the room heard

1. The primary failure is whole-system planning. Dr Kimpton said the failure is "not a lack of technology", nor of capital or ambition, but a failure to plan the system as a whole. She described decisions made in silos: generators against networks, electricity against gas, transmission against distribution, supply against demand. Her fixes were for government departments to align policy; for the National Energy System Operator to plan the whole system; for the Strategic Spatial Energy Plan to become a delivery pipeline; for grid and demand flexibility to be treated as national infrastructure; for planning decisions to weigh whole-system value; and for a single public delivery dashboard tracking networks, generation and storage.

2. The whole carcass, and the unglamorous bits. Jonathan Minnitt, noting the venue, said butchers use "the whole carcass", while politicians prefer the fillets that make the news. The less attractive parts of the system, such as network readiness at scale, will cost money that the public will ultimately pay. He argued the sector follows fashion, and should assess each technology against the system and deploy the right technology in the right system at the right time, not design a system around "fool's gold".

3. Investment signals swing, and the industry is hard to start. Jonathan Minnitt said investment and stated ambition have shifted sharply over four or five years, even under the same party, from hydrogen to wind and back. Using the analogy of a glass ketchup bottle, he said wind faces grid and technology challenges, floating wind is still far off, HVDC supply chains are congested and hydrogen demand has fallen away. The chair added that the second hydrogen allocation round shortlisted 27 projects but a promised hydrogen strategy has not appeared. Jonathan Minnitt argued the answer is not to favour one technology: do not block projects for ideological reasons, and release smaller, entrepreneurial companies as the US did with shale. Prof. Drury added that the aim should be to validate then deploy at pace, so that research does not sit on a shelf.

4. One bottleneck: visibility, flexibility and the power electronics that control the grid. Asked which single bottleneck would unlock most in 12 months, Prof. Drury pointed to innovation deployment across the system. He called for visibility of grid data, including from the system operator, to allow advanced protection and control; flexible connections, so that a household or business can have a firm baseline plus flexible headroom; and recognition that power electronics underpin the whole grid. He said the sector should simulate and test how converters, gas networks and communications interact, since a power failure takes communications down with it.

5. Standards and interfaces. Jonathan Minnitt said technology developers can treat designs as proprietary and forget they must interface with the system. Using the example of phone charger cables, he asked what standards are needed for hydrogen and CO2. He said oil and gas specification equipment can be three to ten times more expensive than off-the-shelf equivalents and far slower to obtain, so getting specifications right can release projects sooner and make them easier to maintain.

6. Homes and flexibility. David Weatherall said that switching to heat pumps and EVs will double or triple the use of clean power, yet only about 3% of households are on smart time-of-use tariffs against a plan for 10 to 12 GW of consumer-led flexibility by 2030. An energy-efficient home is a more flexible home, he said, but only

just over half of homes reach EPC band C, ambition from the Warm Homes Plan appears to be rolling back, and heat pump rollout is progressing but not fast enough. He cited about 75% of homes with smart meters, and called for common data standards and new EPCs to make demand visible, and for flexibility rewards to reach flats, renters and lower-income households as well as owners of EVs, batteries and heat pumps.

The six actions put to the room

Each panellist was asked to nominate one or two actions and an organisation to own each. The chair counted six.

#	Action	Proposed by	Owner and timing as stated
1	Create a national deployment pathway, five years through to delivery, so good technology reaches the networks at pace	Prof. Will Drury	Owned by the government energy department (DESNZ), with Ofgem and with delivery by technology companies and network operators; begin within six months
2	Require that what is deployed is ready for a flexible energy network	Prof. Will Drury	Ofgem, in the next price control; consumers should not have to choose between affordability and investment
3	Double annual heat pump installations, and pair them with insulation and installation quality	Dr Sarah Kimpton	Government and the supply chain; no single owner named
4	Enable SMEs and entrepreneurial businesses to work with government and developers to increase the pace of delivery, drawing on Norway's tax package after the pandemic	Jonathan Minnitt	Government
5	Positive education, communication and engagement, including with STEM, as a responsibility of everyone	Jonathan Minnitt, supported by the chair and panel	Everyone in the sector
6	Developers treat the Future Homes Standard as a minimum, and lock in flexibility in new homes	David Weatherall	Developers of homes and non-domestic buildings, with BRE offering to take ownership

The chair put each action to the room for a response. She reported strong support for the national deployment pathway and for communication and education, and said the room had not narrowed the others down. She noted the underlying theme of all six was whole-systems thinking.

Audience questions and comments

What can the UK learn from Norway, including its sovereign wealth fund? A delegate noted that Norway built a sovereign wealth fund when it found oil and gas, and observed the Budget's decision to create one looks more modest. Jonathan Minnitt said Norway's ecosystem is smaller, with fewer people and a smaller industry, and that its population broadly backs the energy sector, helped by education about it.

Silos in government and industry. A panellist said four areas of government deal with power in different ways and that industry bodies also look at their own slices, and called for the system to be treated as one. They said breaking down silos was raised at last year's event and they are not yet seeing it happen. A second panellist, Jonathan Minnitt, added that getting specifications and standards right would release projects sooner.

Why not commit to heat pumps and district heating, as Sweden has? A delegate said that in Sweden 90% of apartments use district heating and about half of detached homes use heat pumps, and that stories of poor insulation and poor installers in the UK shake confidence. David Weatherall said tens of thousands of UK

homes have heat pumps that work well, himself included, and that homes do not need to be perfectly insulated. He said the sector needs to tell a positive story, and noted the UK has only now reached the point of regulating to find where its heat networks are. He said the UK should hold the line and look to countries such as Sweden.

Lines worth keeping

- "It's not a lack of technology." Dr Sarah Kimpton, on the primary failure
- "Use the whole carcass." Jonathan Minnitt, on the system
- "Move from first-of-a-kind into fully industrialized scaled projects." Jonathan Minnitt
- "Validate and then deploy at pace." Prof. Will Drury
- "Don't look at this as a maximum, this is a minimum." David Weatherall, on the Future Homes Standard

Numbers put on the table

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- 27 projects: shortlisted in the second hydrogen allocation round; hydrogen strategy promised for end of 2025 not yet published (stated by the chair)
- 10 to 12 GW: planned consumer-led flexibility by 2030 (stated by David Weatherall)
- About 3%: households on smart time-of-use tariffs (stated by David Weatherall)
- Just over half: homes reaching EPC band C (stated by David Weatherall)
- About 75%: homes with smart meters (stated by David Weatherall)
- Three to ten times: cost premium of oil and gas specification equipment over off-the-shelf (stated by Jonathan Minnitt)
- 90% of apartments on district heating; about 50% of detached homes on heat pumps in Sweden (stated by a delegate)
- 29 million: homes (stated by the chair)

Candidate commitments for the Declaration

The table below turns the six actions, and the strongest points from the debate, into **proposed** Declaration commitments. Bodies and deadlines follow what speakers stated where they stated them; otherwise they are our proposals for the sector to confirm.

#	Proposed commitment	Directed at	Proposed deadline	Source
1	Create a national deployment pathway so proven technology reaches network operators at pace	DESNZ, Ofgem, technology firms, network operators	Begin within 6 months	Action 1 (Drury)
2	Require new deployments to be ready for a flexible energy network	Ofgem	In the next price control	Action 2 (Drury)

#	Proposed commitment	Directed at	Proposed deadline	Source
3	Set a target to double annual heat pump installations, with insulation and installation quality	DESNZ, MHCLG, supply chain	In next year's spending review	Action 3 (Kimpton)
4	Open the route for SMEs and entrepreneurial firms to work with government and developers, with a specific package to speed delivery	DESNZ, DSIT	Within 12 months	Action 4 (Minnitt)
5	Launch a sector-wide communication and education effort, including STEM engagement	Industry, government, education bodies	Within 6 months	Action 5 (Minnitt, chair)
6	Treat the Future Homes Standard as a minimum and lock in flexibility in new homes	Developers, BRE	Within 12 months	Action 6 (Weatherall)
7	Turn the Strategic Spatial Energy Plan into a delivery pipeline with a single public dashboard for networks, generation and storage	NESO, DESNZ	Within 6 months	Kimpton
8	Right-size specifications and set interface standards for hydrogen and CO2	DESNZ, industry, standards bodies	Within 12 months	Minnitt
9	Extend flexibility rewards to flats, renters and lower-income households	Ofgem, MHCLG, suppliers	Within 12 months	Weatherall

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DAY 2 · OPENING KEYNOTE · OVERVIEW

Opening Keynote Address: Financing the Clean Energy Transition

Positions, claims and figures in this overview are those of the speaker as stated on stage, reproduced from the session transcript. They are not the views of Energise Landscape Ltd or ELUK2026, and have not been independently verified.

The headline

Oliver Holbourn opened Day 2 with the financier's view of delivery: **the UK has projects and ambition, but the capital has to be structured to reach them, and no single institution can do it alone.** The National Wealth Fund (NWF) exists to take risks the private sector will not, to crowd in private capital, and to turn ambition into investable projects. His central message to the sector was collaboration, and to come to public finance early.

For the Declaration, the keynote matters in three ways. It shows **where public capital is going** (grid, nuclear, storage, ports, offshore wind). It exposes **a financing gap in the grid**, where even the NWF's capital and the banks' capacity fall far short of the investment needed before 2030. And it clarifies **how skills and jobs connect to finance**: NWF funds projects that create jobs and does not invest in training directly.

For the ELUK2026 theme, *The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose*, this keynote is the financing front: without risk-sharing capital, cost, security and decarbonisation all stall at the same point.

The speaker

Speaker	Role
Oliver Holbourn	Executive Director and Chief Executive Officer, UK National Wealth Fund

What the keynote said

1. What the NWF is. Holbourn described an institution funded by the taxpayer, roughly five years old, based in Leeds with about 400 people, combining public policy and private finance expertise. Its purpose is to use its own and private capital to finance the government's growth and clean energy missions, with an ambition to drive over £100 billion into the UK economy. The Chancellor's Budget asked it to go further and faster, including by delivering a new Energy Wealth Fund.

2. Three strategic ambitions. First, unlocking growth opportunities on the clean energy pathway, which he said will interest this audience most. Second, accelerating place-based investment across all four nations of the UK. Third, strengthening sovereign and strategic capabilities in a volatile world, which he said is where the NWF needs to dial up the most. Every investment starts from one question: will it help build a stronger, more resilient, more secure and prosperous UK.

3. Targets and deployment. He said the NWF expects to deploy around £5 billion a year, or roughly £100 million a week, and its goals by the end of its strategic plan period are more than 200,000 jobs, over £100 billion into the UK economy and half a billion tonnes of carbon dioxide avoided. The NWF has identified 25 sectors, with 10 where it wants a deep, catalytic role, including nuclear, batteries and storage, and ports, and these are where most equity will go. He said roughly 20% of its capital is equity and 80% is non-equity, so equity is the scarce resource.

4. Track record. He said more than half of NWF capital to date has gone into clean energy, and he expects that to continue broadly. Excluding Sizewell C, it has committed over £11 billion across more than 80 businesses and mobilised over £20 billion of private investment.

5. Catalytic means taking the risk the private sector will not. That can be construction, technology, revenue or policy risk. Minimum investment size is £25 million for equity and £50 million for debt. The NWF works through a "no wrong door" approach with other public financial institutions, referring projects to Great British Energy, the Scottish National Investment Bank, the Development Bank of Wales or the British Business Bank where they are a better fit.

6. Collaboration is the key message. Holbourn said none of this is achievable alone, and asked anyone with a meaningful company or project needing funding to approach the NWF early and not late, so the financing problem can be worked out together.

Investments cited

Investment	Detail as stated
SSEN Transmission	An £800 million financial guarantee against a £1 billion opportunity, supporting four major grid projects in Scotland, 3,500 jobs and infrastructure across Skye, Argyll and Kintyre
Scottish Power	£600 million of financing for two-gigawatt subsea cables of about 530 km from Scotland to Norfolk, moving power to demand in England
Rolls-Royce SMR	£599 million, covering up to half of eligible design costs; each reactor about half a gigawatt; at least 1,800 jobs including 400 apprenticeships
A UK battery materials company	£53 million for next-generation silicon-based materials for lithium-ion batteries, to improve density, range and charging and reduce reliance on overseas suppliers
Pentland floating offshore wind	Co-invested alongside Great British Energy, cited as an example of collaboration

He said the UK is doing good things on nuclear, praised the work of the energy department on the advanced nuclear framework, and said Rolls-Royce's export announcements show others see the UK proposition as best in class.

Questions from the floor

How will the NWF's success be measured, given long-dated, high-risk investments? Holbourn said every investment is assessed on risk-adjusted return on one side, and jobs created, carbon abated and private finance mobilised on the other. Targets are public and an annual impact report was published two weeks earlier. Excluding the Sizewell C loan, the shareholder has asked the NWF to break even on its base capital,

not to hit its cost of capital, and he balances risk, impact and return across the portfolio and not asset by asset. He said his cost of capital is gilts plus about 11 basis points.

What is the minimum project size? £25 million for equity and £50 million for debt. For smaller projects he pointed to Great British Energy, the Development Bank of Wales and the Scottish National Investment Bank, or the British Business Bank for smaller companies, and said any of them will cross-refer.

Why has the NWF invested only a small share in grid upgrades that may need £70 to £150 billion? Holbourn agreed the questioner was right. He said if the NWF put 10% of its roughly £42 billion of capital into the grid, about £4 billion, it would not come close to the £38 billion of investment the system operator expects before 2030. He said the grid is a regulated asset that banks are willing to finance, but many banks are reaching single obligor limits, particularly in sterling, and under Basel III find it hard to lend for more than about five years. The NWF does not believe current bank and NWF capital will be enough for the investment to flow, and is talking to others about how to solve it.

Would the NWF invest in skills? Holbourn said it does not invest in skills directly, but finances projects in which skills are developed, such as the Rolls-Royce SMR project with 400 apprentices. Jobs are an impact measure, and the NWF tries to assess whether jobs pay above the local median. It has sector-by-sector conversations about what UK content of 10% or 20% would require in skills.

Would the NWF invest in the delivery framework beneath projects, such as industrial capability and capacity? Holbourn said the NWF is set up to invest in projects and businesses and not in what he called people capital such as new universities or training programmes. He said it works with others so that sector requirements for UK content flow through into the skills and supply chain needed, and noted nuclear will need many people to build and, more importantly, service plants.

Asks from the speaker

#	Ask	Who it requires
1	Collaborate across public and private institutions; none of this is achievable alone	Whole sector
2	Bring meaningful projects to public finance early, not late	Developers, companies
3	Use the "no wrong door" approach and be willing to be cross-referred to the right public financial institution	Companies, public financial institutions
4	Help turn ambition into investable projects by bringing public and private finance together	Industry, financiers

Numbers put on the table

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- About £28 billion: initial capital; extra capital from the Budget, with a portion for the Energy Wealth Fund (units to confirm); about £42 billion total capital (stated by Oliver Holbourn)
- Over £100 billion: ambition to drive into the UK economy (stated by Oliver Holbourn)
- About £5 billion a year, roughly £100 million a week: planned deployment (unit to confirm; stated by Oliver Holbourn)
- 200,000 jobs; half a billion tonnes of CO2 avoided: goals for the strategic plan period (stated by Oliver Holbourn)

- 25 sectors; 10 priority sectors; about 20% equity and 80% non-equity (stated by Oliver Holbourn)
- Over £11 billion committed across 80 businesses, excluding Sizewell C; over £20 billion private investment mobilised (stated by Oliver Holbourn)
- £25 million minimum equity; £50 million minimum debt (stated by Oliver Holbourn)
- £70 to £150 billion: grid upgrade investment (stated by an audience member); £38 billion before 2030 (stated by Oliver Holbourn)
- Gilts plus about 11 basis points: the NWF's cost of capital (stated by Oliver Holbourn)

Candidate commitments for the Declaration

The table below converts the keynote's main points into **proposed** Declaration commitments. The bodies named and the deadlines are our proposals for the sector to confirm, not undertakings given on stage.

#	Proposed commitment	Directed at	Proposed deadline	Keynote evidence
1	Publish a single guide to public finance routes, with a cross-referral protocol between the National Wealth Fund, Great British Energy, the British Business Bank and devolved banks	National Wealth Fund, public financial institutions	Within 6 months	"No wrong door" approach and the patchwork of institutions
2	Set out options to close the grid financing gap, including long-tenor structures and the effect of bank lending limits	HM Treasury, National Wealth Fund, Ofgem, NESO, banks	Options published within 6 months	£38 billion need against about £4 billion of potential NWF capital; bank limits
3	Industry brings bankable, meaningful projects to public finance early, with a shared pipeline	Developers, industry bodies	Within 6 months	Ask to talk early
4	Publish UK-content and skills requirements by sector so finance flows through to training and the supply chain	Government departments, skills bodies, National Wealth Fund	Within 12 months	Skills and delivery framework questions
5	Report public finance impact consistently, including jobs, carbon abated and private capital mobilised, with job quality measured against local pay	National Wealth Fund, public financial institutions	At next year's summit	Impact measures and annual impact report

Lines worth keeping

- "None of this is achievable alone." Oliver Holbourn
- "Equity is the scarce resource." Oliver Holbourn
- "We want to turn ambition into investable projects." Oliver Holbourn
- "Come and talk to us early rather than later." Oliver Holbourn

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DAY 2 · PANEL 6 · OVERVIEW

Fusion Energy: From Scientific Ambition to Construction Site – The Moment Britain Goes All In

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) · First panel of the day **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Basis:** Held under the Chatham House Rule: remarks are attributed to "a panellist" or "the chair" only.

The panel

Name	Role
Louise McClelland (Chair)	CEO, Dowds Group
Dr Elina Militello Asp	Scenarios Team Lead, Plasma Science & Fusion Operations Division, UK Atomic Energy Authority
Dan Wolff	Head of Strategy & Investment, UK Fusion Energy Ltd (UKFE)
Tristram Denton	UK Director, Fusion Industry Association

The bottom line

The panel's message was that fusion is a rare sector where Britain still has a genuine chance to lead, and that the chance depends less on physics than on sustained political and commercial nerve. The science is not yet proven at power-plant scale. Private capital and company timelines are moving faster than public programmes. The UK's strongest play is to be indispensable in the global supply chain, not to try to own the whole value chain. Skills, regulation and consistent demand for projects were named as the things that turn ambition into construction.

What the panel said

1. Where fusion stands. A panellist explained that fusion has not yet produced net energy from the devices built so far. The work now is designing and building the next generation of prototypes. The UK's STEP programme is targeting 100 megawatts of net electrical output at West Burton, Nottinghamshire, and a panellist explained that it is a prototype, deliberately conservative, and not as efficient as later commercial plants. The remaining technical challenges named were plasma confinement and stability, materials that

withstand extreme conditions, and tritium. A panellist noted that a burning plasma will largely heat itself and decide its own behaviour, so STEP is needed to test whether the physics models hold up.

2. Why it matters. A panellist described fusion as a strategic opportunity for the UK to lead, pointing to world-class facilities in Oxfordshire across robotics, materials and magnetics. The strategic logic offered for STEP was one big, bold government market intervention to capture value for generations. Another panellist stressed the clean-energy case: no greenhouse gases at the point of generation, very little waste, and a goal of developing materials whose activation fades over around a hundred years, not the hundreds of years associated with fission waste.

3. Public and private working together. The three-part model described was UKAEA as national laboratory, UKFE as the delivery company and the wider supply chain as the sector where the value, products and jobs will be created. A panellist said it was preferable to call it "the sector", not "the supply chain". The public side stressed it is spending public money and must be able to defend its decisions, which makes it more cautious than private companies. The private side said nobody envisages government owning power stations. The consensus is that the market will be private, with the public programme building the foundations.

4. Private momentum and timelines. A panellist told the audience that private fusion is moving at a pace public programmes cannot match, with a large share of the capital raised since 2021. Most of the companies the trade body works with expect an advanced market by 2035, and a panellist said this target has held steady for six years, in contrast to sectors where target dates drift out each year. The public-side panellist described 2035 as slightly ambitious and said the UK programme is working to a 2040 timescale.

5. Competition and cooperation. A panellist said China is moving at speed, building from scratch in under ten years from conception to operation and planning an upgraded device within three years. The US was described as strong in spinning out start-ups and mobilising capital, and Germany as having a strong sector. The panel's view was that the UK cannot out-spend the US on start-up capital but can keep its seat at the top table by making UK tier 1 and tier 2 companies essential to everyone's supply chains. Fusion was described as having started as a collaborative endeavour, with the current shift to a competitive landscape taken as a sign of commercial credibility.

6. Skills. The chair raised the construction industry's workforce shortfall. Panellists agreed that most fusion skills are common across the energy sector, innovation and wider technology, so the answer is a shared energy skills base. One panellist argued, drawing on experience in fission, that the skills gap persists because delivery has not been sustained: people will not relocate their families for a stop-start pipeline. Their conclusion was that consistent demand for good, well-paid, potentially unionised jobs comes first, backed by a stable regulatory and market framework. Others called for STEM outreach that links classroom learning to real engineering jobs, and for clear routes for people to transfer current skills into fusion. The pace of the education sector was described as a constraint.

7. Economic security and openness. Asked from the floor whether the UK should protect its knowledge, skills and capital more tightly, a panellist agreed that STEP is intended to build UK IP capability that the UK keeps and uses for UK growth. Another panellist cautioned against a drawbridge approach: a completely closed UK supply chain would not dominate the world, so the UK should engage the global market and take a calculated risk on openness. A panellist suggested a "NATO for fusion" style of cooperation and pointed to the recent UK collaboration with the US Department of Energy and G7-type arrangements as the route.

8. Data centres. The chair suggested data centres could be the first customers of fusion. A panellist said it is too early to know whether data centres will be first, but agreed that off-take arrangements are a critical part of the conversation.

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
100 MW net output at West Burton, Nottinghamshire	STEP programme target	A panellist
A gigawatt or more of thermal output, with a portion recycled	Ballpark scale needed for STEP to deliver 100 MW	A panellist
$4 trillion to $12 trillion by the end of the century	Forecast value of fusion	A panellist
More than 50 private fusion companies globally; more than 5 have raised $1 billion or more	Scale of the private sector	A panellist
$14 billion to $20 billion invested in private fusion	Total private investment, "depending on which number you use"; most since 2021	A panellist
Over 75% of member companies (around 48) expect an advanced market by 2035	Annual trade body poll; target date unchanged for six years	A panellist
2040	UK public programme delivery timescale	A panellist
China: upgraded device in around 3 years; build from scratch in under 10 years	Competitor pace	A panellist
Below £100 per megawatt hour	Cost the companies forecast for fusion power	A panellist
Around £150 per megawatt hour in 2012	Offshore wind CfD price quoted by an audience member as a cost-reduction comparison	An audience member
More than 1 million additional and replacement workers over the next decade	Construction and built environment workforce requirement	The chair
100-year half-life	Target for the materials being developed, to cut component storage time	A panellist

Closing messages from the panel

Asked for the single most important thing to happen to stay on the 2035–2040 path, the panel offered three answers:

- **Bring in the delivery partners.** A panellist said the next big step for the STEP programme is bringing in additional partners, alongside visible technology progress.
- **Build STEP and prove the physics.** A panellist said getting STEP built and online is the biggest challenge, so that the physics known today can be tested and any surprises found.
- **Hold the nerve.** A panellist said this is now about courage and heart. The country has spent over half a century building the regulation, investment arrangements, technology and supply chain. If it wavers at the difficult moments on legislation, technology or commercial delivery, it loses a lifetime of progress.

Audience questions

1. **Net energy.** A questioner asked whether the energy a power plant itself needs would leave little exported power. A panellist answered that STEP is a prototype with a deliberately conservative design, that the US National Ignition Facility has demonstrated gain in a different approach, and that magnetic confinement still has work to do before commercial scale.
2. **Which design.** A panellist observed that there is no single design, with demonstration devices, UK advanced designs and US construction plans in parallel, and that first-generation plants are stepping stones, as early fission plants were.

3. **Cost per megawatt hour.** A questioner referred to the cost reduction in offshore wind and asked for the top three things for fusion. A panellist said the two drivers are capital cost and cost of capital, that the UK is developing a framework to address the latter, and that the industry is focused on commercial markets, with a forecast of below £100 per megawatt hour.
4. **Economic security.** A questioner from the battery industry asked whether the UK should protect its skills, money and IP. The answers are summarised under point 7 above.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the panel's discussion, and are not commitments offered by panellists. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish a sustained, multi-year pipeline of fusion delivery milestones, so supply chain and skills investment can plan against consistent demand	UKFE with DESNZ	Within 12 months of the Declaration
2	Confirm the fusion regulatory and market framework, including the National Policy Statement, with no slippage on current timelines	DESNZ	Within 12 months
3	Set out a UK tier 1 and tier 2 fusion supply chain strategy that positions UK companies in global programmes, with named targets	DESNZ, UKAEA and Fusion Industry Association	Within 12 months
4	Agree a cross-sector energy skills plan, covering fusion, fission, grid and construction, with funded transfer routes from existing industries	Skills England, industry and UKAEA	Within 12 months
5	Define how UK-developed fusion IP is kept and used for UK growth while sharing results with trusted allies, including a position on international cooperation (US, G7)	DESNZ and UKAEA	Within 12 months
6	Set out how private capital and public programmes work together, including early thinking on off-take (for example data centres)	Fusion Industry Association, UKFE and HM Treasury	Within 12 months

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DAY 2 · PANEL 7 · OVERVIEW

The Global Clean Energy Investment Race: How Does Britain Win Its Share?

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Basis:** Held under the Chatham House Rule: remarks are attributed to "a panellist" or "the chair" only.

The panel

Name	Role
Simon Emeny (Chair)	Director, Specialist Markets, LRQA
Colin Hudson	Managing Director, Investment & Advisory, National Wealth Fund
Graham Nicholson CEng MIMechE	Senior Principal Consultant, Entr (part of Aker Solutions)

The bottom line

The panel's message was that Britain does not have a shortage of announced clean energy investment. It has a shortage of delivered projects, and the causes are fixable: a Contracts for Difference (CfD) system that gives developers no reason to fund early engineering, an unpredictable pipeline, slow onshore consenting, and no long-term whole-system strategy insulated from the political cycle. The fix proposed was to measure success by what is built and generating, not what is announced, and to give investors and engineers a predictable, visible pathway.

What the panel said

1. Announcements are signals, not success. The chair opened by asking how Britain moves from announcements to delivery. A panellist said announcements are useful signalling to industry but are the wrong measure of success, and that most of the headline total is planned future spend. The measure that matters, in that panellist's view, is installed capacity and how much power renewables actually produce. The progress already made was acknowledged: renewables now supply roughly 40% of generation, up from close to zero fifteen to twenty years ago.

2. Where the money goes. One panellist offered a rough split of the headline total: about £80 billion in long-term grid infrastructure and about £20 billion tied to CfD-supported generation. The point made was that

grid is onshore, expensive and caught up in planning, consenting and public inquiry. A second panellist agreed the total is easy to reach once offshore wind, AR7 and grid investment are added together, and pointed out that the UK already has a large fixed offshore wind pipeline under construction.

3. The CfD gap on early engineering. A panellist argued that developers will not spend on engineering and design until they hold a CfD, so the process behaves like a waterfall: everything happens after the award. Industry knows how to de-risk projects in stages, and it is cheaper to discover a project is not feasible in early design than in construction. Another panellist agreed that recent cases show what happens without front-end engineering: projects have handed back their CfD or gone into long pause. Neither panellist wanted more scrutiny to slow awards. The advice was to keep the momentum while making sure the incentives work.

4. How investors decide. A panellist explained that lenders and investors are guided by due diligence, contractual structure and the depth of the sponsors standing behind a project, because offshore wind projects were too large for conventional fixed-price contracts. Competition and incentives matter: a regime that encourages winner's remorse produces misses, and a regime that ties owners' returns to build cost pushes them to get early design right. Finance products exist to respond to individual risks such as cost overruns.

5. Where public capital is going. A panellist said public capital has been concentrated on grid, storage and grid stability, then increasingly on fixed offshore wind and nuclear, with the aim of keeping the cost of capital under control so developers do not have to turn to the marginal lender. The same panellist said the UK is a leader in global offshore wind but has no domestic original equipment manufacturer (OEM), a gap the panellist described as a miss in supply chain policy that should not be repeated in nuclear.

6. A whole-system strategy. A panellist called for a long-term strategy covering oil and gas, renewables and nuclear, insulated from geopolitical instability, local political ambition and public fashion, with an independent body setting the pathway. Nordic and Japanese approaches were cited as examples of frameworks that survive changes of government. A key barrier named was visibility: developers know the timing of the next CfD round (AR8) but not the rounds after it. Another panellist pointed to the forthcoming Strategic Spatial Energy Plan as the source of guidance on where generation will be deployed, and argued that building an industry that employs tens of thousands is itself the best protection against policy reversal.

7. Standardise and repeat. A panellist advised the sector to stop innovating and start standardising where it can, because standard designs improve predictability and cut risk. A second panellist said costs in infrastructure fall when the same thing is built repeatedly, and that the UK too often builds one-offs. Both agreed a predictable pipeline of predictable projects is what lowers risk.

8. Cost and delivery of big infrastructure. The panel discussed why large UK projects overrun. One panellist stressed designing before building, and pointed to the planning process pushing developers to conservative and expensive initial designs. The panellist said competition at contract award, owners with the right incentives and public-private partnership models that worked together had delivered projects broadly on time and budget. Another panellist added that public contracts can be treated as easy pickings and that onshore planning and consultation are tied up with politics.

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
£27.8 billion, increased by £15.4 billion	Capital available to a UK public investment institution; the increase was described as recent	A panellist
About £11 billion deployed, at roughly £4.5 billion a year	Deployment to date and current pace of the same institution	A panellist

Figure	Context	Stated by
£35 million	Minimum investment ticket size of that institution; described as under upward pressure	A panellist
About £2 billion over two to two and a half years	Invested in projects and borrowers developing the UK grid	A panellist
£500 million to £600 million	Recent investment in battery storage holding companies	A panellist
About £100 billion	Headline clean energy investment announced; described as comparable to the planned HS2 budget	A panellist
About £80 billion and about £20 billion	Panellist's rough split of the £100 billion between grid infrastructure and CfD-related generation	A panellist
About 40%	Share of generation from renewables, from a live grid data site	A panellist
8 GW at about $5 billion a gigawatt, or about $40 billion	AR7 offshore wind capacity and a rough cost estimate	A panellist
12 GW	Fixed offshore wind under construction	A panellist
240,000 jobs	Figure referred to by the chair as cited by the Chancellor	The chair
£40 billion by 2030	Projected cumulative economic and bill savings from UK residential retrofits	A panellist

Messages from the panel

- **Measure delivery, not announcements.** Installed and generating capacity is the measure that matters.
- **Fund early engineering.** Stage-gate projects so that feasibility, design and prototyping are rewarded before a CfD award, not after.
- **Give the pipeline visibility.** Developers and lenders need to know the CfD rounds beyond AR8 and the spatial plan for where generation goes.
- **Plan beyond one parliament.** A long-term whole-system strategy, with independent or insulated governance, was named as the thing the sector most needs.
- **Be brave.** The chair's closing takeaway was that Britain has to be brave and build with more confidence in its own ability to deliver.

Audience questions

1. **Is it an engineering problem or an execution one?** A questioner with forty years in major projects argued that overruns on large infrastructure are execution and project management failures, not engineering ones. A panellist cited projects that were delivered close to budget, and said the keys are designing before building, competition in contract award, and building repeatedly to bring costs down. Another panellist added concerns about lack of scrutiny of public contracts and planning that has become a political football.
2. **What can fusion learn about de-risking?** A questioner asked what an early-stage industry such as fusion can learn from CfD experience. A panellist said CfD does not work well for innovative projects, and suggested that CfD-style support should focus on small-scale demonstration before going big, with strong scrutiny of delivery and financing plans. Another panellist said the fear of failure creates a straitjacket, and that failure should be treated as learning that allows another attempt. The panellist also noted that an innovation fund had been withdrawn in favour of routing demonstration funding through CfD, which was seen as unclear in practice.

3. **Should the conversation be about risk?** A questioner argued the sector should discuss risk appetite openly, noting that something goes wrong on every project every day and that flexibility, not perfection, keeps delivery on track. A panellist added that people get what they measure, that the UK tries to be too exact, and that the island is capable of delivering with more confidence. A panellist said Singapore's interest in small modular reactors is about demonstrating how to do it well.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the panel's discussion, and are not commitments offered by panellists. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish the timetable for CfD allocation rounds beyond AR8, so developers and lenders can plan against a visible pipeline	DESNZ	Within 12 months of the Declaration
2	Introduce a funded route for early-stage engineering and front-end design before CfD award, so projects are de-risked before they commit to build	DESNZ and HM Treasury	Consultation within 12 months
3	Report delivery by installed and generating capacity, not announcements, with a regular public tracker	DESNZ	Within 12 months
4	Set up an independent, whole-system pathway body, or an equivalent protected framework, covering oil and gas, renewables and nuclear, with cross-party support	UK Government	Proposal published within 12 months
5	Publish the Strategic Spatial Energy Plan with clear guidance on where and what generation is deployed, and link it to the CfD timetable	DESNZ	Within 12 months
6	Create a standardisation programme for repeatable designs and components across offshore wind, grid and storage	Industry bodies with DESNZ	Programme launched within 12 months
7	Provide a demonstration funding route for innovative projects that is separate from the CfD mechanism	DESNZ	Within 12 months
8	Set a domestic supply chain strategy that avoids repeating the offshore wind OEM gap in nuclear and other new technologies	DESNZ and Department for Business and Trade	Within 12 months

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DAY 2 · PANEL 8 · OVERVIEW

Sovereign Power: Building the Energy Mix That No Geopolitical Shock Can Break

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Basis:** Held under the Chatham House Rule: remarks are attributed to "a panellist" or "the chair" only.

The panel

Name	Role
Mark Warner (Chair)	Managing Director, AMW Contractors UK Ltd
Fiona Reilly	Chief Executive Officer, FiRe Energy Ltd
Christian Gibson	GM UK Energy System & Transition, Shell
Simon Emeny	Director, Specialist Markets, LRQA
Paul Kavanagh	Net Zero Energy Fund

The bottom line

The panel's message was that sovereignty in energy means control and choice, not self-sufficiency, and that Britain gets there with a diverse portfolio, a single whole-system plan and a clear position on who it will build with. Panellists agreed the UK has the engineering talent and the tools. What it lacks is a joined-up strategy, decisions taken at the speed of its competitors, and clarity from government on the rules, whether for nuclear, foreign investment or grid connections.

What the panel said

1. Delivery has lagged ambition. The chair opened by pointing to the gap between targets and delivery, noting that only 1.3 gigawatts of offshore wind was connected in 2025. A panellist said renewables are a real success, running at around 47% of generation on the morning of the session, but argued that offshore wind was pursued because it was ready to do, without enough thought about onshore connection, supply chain or recycling. Another panellist said the UK has an overloaded grid and keeps generating power far from where it is needed.

2. Whole-system thinking and diversity. Several panellists said energy is still planned in silos: renewables, nuclear and fusion each get their own tick-box. The panel used the image of a Lego set to make the point that firm, large blocks such as gas and nuclear are the base that makes many smaller renewable pieces work, and that resilience comes from a diverse portfolio able to cope with cold, low wind, heat domes and other shocks. A panellist said no good Lego model is built from one type of brick. The international debate has moved from net zero to energy security, and panellists argued the UK needs one strategy that pulls all technologies together, with government owning it collectively.

3. What sovereignty means. A panellist said sovereignty means control: lose control of a resource and you lose sovereignty. Another panellist argued that for an island that will keep importing gas and some oil products, sovereignty should be defined broadly. It should cover Europe and global trade, including interconnection with France, and gas from Norway, Qatar and the US, so the UK should be cautious about denying itself that flexibility. A third view was that the UK needs one sovereign plan securing energy, jobs, finance and the country, since no single business or nation within the UK is big enough alone.

4. Government sets the framework, the private sector proposes how. Panellists agreed government must create stable, competitive market frameworks. One panellist added that the nuclear sector has too often waited to be told what to build, while the renewables sector did better by telling government what it could deliver if given the right framework. The panel called for a balance: government defines the market, and industry comes forward with delivery propositions. Some panellists argued the UK also needs more entrepreneurial energy, with entrepreneurs pushing projects forward and engineers testing the risks, and that the UK too often waits for permission from government, which in turn waits for the electorate.

5. Use the energy we make, close to where it is needed. A panellist argued that the question is not only how green power is produced but how much of it is used, given the energy wasted overnight. The panellist said the grid will not be upgraded by 2035 at the pace needed, and that private investment in local generation, storage and demand, such as industry and data centres, would take pressure off the grid. As an illustration, the panellist described offering a steelworks power at 12 pence per kilowatt hour, with a maintenance package, guaranteed for 25 years, and finding that the buyer did not believe it. Panellists suggested the barrier is trust and investment confidence, more than technology.

6. Working with China, and the security line. The chair asked about a recent government decision to block a Chinese turbine manufacturer from UK offshore wind projects on national security grounds, which was said to have ended a planned £1.5 billion Scottish factory and more than 1,500 jobs. Panellists said this is not an anti-China position but a pro-sovereignty one. One suggested allowing Chinese shareholding but not majority shareholding, so that the UK retains IP, rights and manufacturing benefit. Another said the UK has already allowed dependence to develop, for example in electric vehicle batteries and buses, without defining the threshold, and pointed to the 5G equipment reversal as an example of setting a rule too late. Another panellist said international connections drive growth and should be encouraged. The shared conclusion was that the question is not binary: the UK needs to decide what it wants from foreign partners and make the rules clear before projects begin.

7. The nuclear gap. A panellist said fusion looks strong, with UK expertise and private money arriving, and that government should work with that private capital to deliver faster and cheaper. On fission, a panellist said the position is poor: two large projects are proceeding, built on political decisions rooted in history, while SMR programmes lack a firm project, site or finance. The panellist contrasted this with the European Commission, which was described as assessing state aid applications very quickly, and with the US and Canada, where new reactor designs are being built. Another panellist said life extensions of existing stations are a short-term fix that is expensive and diverts money from new projects, and described nuclear as a long-lived transitional technology for which the UK should be building now. A panellist noted that governments in international fora talk about collaboration on next-generation designs, but do not always share IP and information.

8. AI, data centres and the grid. A panellist said grid connection is the biggest challenge for data centres and the UK needs to say clearly whether AI growth is a top national priority. The panellist added that building nuclear off-grid to serve data centres does not work for regulatory and safety reasons, and data centres

also want grid connection for security of supply. The suggestion was to build ecosystems: for example, a project in Europe is weighing a small modular reactor feeding a heat network versus feeding a data centre whose waste heat is then reused. Panellists said isolated data centres deny the system flexibility and security.

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
1.3 GW	Offshore wind connected in 2025	The chair
Around 47%	Share of UK generation from renewables on the morning of the session, from a live data site	A panellist
£1.5 billion and more than 1,500 jobs	Scottish turbine factory plan said to have ended after a government security decision	The chair
12 pence per kilowatt hour for 25 years	Illustrative offer of power to a steelworks, with a maintenance package	A panellist
2035	Date by which a panellist said the grid cannot be upgraded at the pace needed	A panellist
14 governments	Membership of an international forum on next-generation nuclear technology, described as not fully sharing IP	A panellist

Messages from the panel

- **Plan the whole system.** One strategy covering gas, renewables, nuclear, fusion and storage, owned collectively across government.
- **Define sovereignty and the security line.** Control and choice, including Europe, with clear published rules on foreign ownership and supply chains.
- **Decide faster on nuclear.** Pick technologies, projects and finance at the pace competitors are moving.
- **Connect strategic demand.** Speed up grid connection for the priorities the UK names, including data centres, and build local energy ecosystems.
- **Be ambitious and confident.** A panellist's closing view was that the UK has the tools and needs the ambition and confidence to use them, with a bold entrepreneurial streak balanced by engineering rigour.

Audience questions

1. **Speed to market versus sovereignty.** A questioner from the technology sector said speed is critical if the UK wants to lead in AI, and that doing business here can add months compared with other locations. A panellist said the UK already works with Chinese firms in many areas, but has not been clear about what it wants from the relationship, so businesses cannot judge the regulatory position before they engage. The panellist called for a clear plan and for positioning projects to fit government ambitions, such as UK manufacturing and jobs, not closing the door. Another panellist then turned the discussion to AI, with the grid connection point covered above.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the panel's discussion, and are not commitments offered by panellists. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish a single whole-system energy strategy setting out the role of gas, renewables, nuclear, fusion, storage and interconnection, with named delivery owners	DESNZ	Within 12 months of the Declaration
2	Publish clear criteria for foreign ownership and supply chain dependence in energy, covering shareholding, IP, data and manufacturing benefit, so investors know the security line before they commit	Cabinet Office, DESNZ and Department for Business and Trade	Within 12 months
3	Set out market frameworks for firm and nuclear capacity that invite private sector delivery proposals, as was done for renewables	DESNZ	Within 12 months
4	Confirm the next-generation nuclear programme: technology choices, sites, finance and timetable, with a state aid and regulatory assessment process that matches European speed	DESNZ and Great British Energy – Nuclear	Decision within 12 months
5	Prioritise grid connection for strategic demand, including data centres, and publish the criteria for that priority	Ofgem and DESNZ	Within 12 months
6	Create a regulatory route for local energy ecosystems that co-locate generation, storage, industry and data centres, using waste heat and demand flexibility	Ofgem and DESNZ	Within 12 months
7	Set a UK position on energy interconnection and import security that treats European and global energy links as part of sovereignty	DESNZ and Foreign, Commonwealth & Development Office	Within 12 months

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DAY 2 · CASE STUDY · OVERVIEW

Sizewell C: On Time, On Budget, and Building the Blueprint Britain Needs

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) · Case study, afternoon session **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose

The speaker

Name	Role
Tilly Spencer	Chief Technical Officer, Sizewell C

The bottom line

Tilly Spencer's case was that Britain can build nuclear cheaper and faster by copying the design and changing the delivery. Sizewell C is a near-identical copy of Hinkley Point C, so the project can put its effort into how it builds, through modular construction, automation, digital logistics and cheaper finance, not into what it builds. She framed Sizewell C's challenge as proving that a replicated approach works, which would build confidence that Britain can deliver big infrastructure beyond nuclear.

What was said

1. The paradox of replication. Spencer explained that Sizewell C in Suffolk is planned as a near-identical copy of the two EPR units being built at Hinkley Point C in Somerset. In her words, the strategy is to "copy the what" and "change the how": a Hinkley unit and a Sizewell unit should look and feel the same in a decade's time, but be delivered in a transformed way. The aim is to shift the dial on how nuclear is delivered in the UK and worldwide.

2. Why nuclear, and why scepticism is fair. Spencer said no single technology can deliver everything the UK needs and that renewables must play the biggest part in a clean energy system, but that intermittency has a cost that shows up in household bills. Nuclear supports renewables by producing clean energy whatever the weather, reducing the need for expensive backup and helping keep the grid stable. She accepted that scepticism about the nuclear industry's record is fair, noting that the track record is not good in the UK or in Europe, and that Hinkley had to rebuild a supply chain and skills base that had been lost since Sizewell B came online in the 1990s.

3. Why large projects go wrong, and how Sizewell C differs. Spencer named three reasons that large projects fail: no mature design, no mobilised supply chain, and poor productivity and logistics. Sizewell C starts with a design, a supply chain already invested in by Hinkley, and the chance to focus on construction productivity. Hinkley and Sizewell C together mean the UK is building a series of nuclear power stations for the first time, not one at a time, and Sizewell C can use thousands of lessons already learned.

4. Modular construction. The EPR was not originally designed to be built modularly, with everything delivered in situ. Hinkley has moved toward precast rooms built in factories and lifted into place, starting small and scaling up. Sizewell C plans to scale this much further, to the point that Spencer said it could be called a large modular reactor. The approach takes millions of hours of work off site and off the critical path, into safer factory conditions with higher quality.

5. Automation and digital logistics. Spencer described plans to automate a significant share of the welds needed for a nuclear power station, and to work with the civil supply chain to automate steel fixing, which is traditionally manual and artisan. On logistics, Sizewell C is setting up a digital control tower to track components from the factory to their final place on site, which she said has been called an "Amazon Prime model" for nuclear construction. She said the ambition is to share what works with other infrastructure projects.

6. Finance and risk. Spencer said the cost of capital is one of the biggest challenges for nuclear worldwide: the more expensive it is to raise capital, the more expensive the project. The financing model developed for Sizewell C aims to lower financing costs by attracting a broader range of long-term investors and sharing risk more effectively, which she said translates directly into lower costs for consumers over the life of the project.

7. Culture and people. Spencer said innovation must not compromise safety, quality or technical excellence, but that the industry is "not short of processes" and needs to learn quickly and be outward looking. She called for a culture where safety is the foundation, improvement is always expected, lessons are shared openly and people are trusted to solve problems and take ownership.

Numbers put on the table

Every figure below was stated by the speaker during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
Around 6 million homes	Electricity Sizewell C is expected to supply, reliably and cleanly	Tilly Spencer
Around 30%	Efficiency gains in cost and schedule seen at Hinkley between unit 1 and unit 2	Tilly Spencer
Over 85%	Share of the Sizewell C design identical to Hinkley	Tilly Spencer
4, then 26, then 195	Modular units: four on Hinkley unit 1, 26 on unit 2, and 195 planned across both Sizewell C units	Tilly Spencer
Millions of hours	Work taken off site through modular construction	Tilly Spencer
Hundreds of thousands, if not millions	Welds needed to build a power station	Tilly Spencer

Audience question

How can innovators bring new logistics and financing ideas to the project? A questioner from a company working on new logistics systems and a financing model, supported by an Innovate UK programme, asked how to find the project's challenges and bring innovators forward. Spencer said the nuclear industry will not find the answers by looking inward, and that Sizewell C has an innovation portal through which it shares its

challenges and invites contributions from the wider industry and supply chain. She noted that the Amazon warehouse comparison is apt, with the extra need to handle sensitive equipment carefully.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the session, and are not commitments offered by the speaker. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Treat nuclear as a fleet programme: commit to replicating proven designs across a series of units, so learning, supply chain and skills carry from one project to the next	DESNZ and Great British Energy – Nuclear	Policy position within 12 months of the Declaration
2	Publish and share delivery lessons from Hinkley Point C and Sizewell C across all major infrastructure, with a public learning report	Sizewell C, Hinkley Point C and the National Infrastructure and Service Transformation Authority	First report within 12 months
3	Back off-site manufacturing and automation in nuclear and wider infrastructure, including modular build, automated welding and steel fixing	DESNZ, Department for Business and Trade and industry	Programme plan within 12 months
4	Use digital logistics tracking on major infrastructure projects, with open sharing of what works	Major project owners with the Infrastructure and Projects Authority	Adopted on new major projects within 12 months
5	Extend the lower-cost financing model used for Sizewell C to other large energy infrastructure where it reduces cost to consumers	HM Treasury and DESNZ	Review published within 12 months
6	Provide an open innovation route for outside suppliers to engage with nuclear and infrastructure delivery challenges	Sizewell C and industry bodies	Route open within 12 months

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DAY 2 · KEYNOTE · OVERVIEW

Lord Bird MBE: Fuel Poverty and the Case for Prevention

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) · Second keynote address **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose

The speaker

Name	Role
Lord Bird MBE	Founder of The Big Issue; Crossbench peer, House of Lords

The bottom line

Lord Bird's message was that Britain spends heavily on keeping people in poverty and very little on preventing it or curing it, and that fuel poverty is the most obvious place for the energy sector to change that. He asked the room to put its industry to work on prevention, through fuel policy, jobs and patient investment, so that households are not forced to choose between heating and other essentials.

What was said

1. Poverty used to be cheap, and now it is not. Lord Bird described growing up in a London slum in the years after the Second World War, when poverty was cheap to maintain because housing was cheap. He said that has reversed: in his words, "It's expensive now to keep people poor." He argued that around 40% of the tax people pay goes toward maintaining people in poverty, mostly in emergency responses, and that little goes into prevention or cure.

2. Prevention, emergency and cure. He described The Big Issue's three-part framework of prevention, emergency and cure, and said the big money goes into emergency. He linked rising housing costs to the sale of more than two million social homes, which he said made housing more expensive and pushed more people toward poverty.

3. What The Big Issue does about it. He said The Big Issue began by giving people work, then moved to prevention. Its social investment arm, Big Issue Invest, has invested in housing, in support to move people off the street, and in a school for disabled children, and is now turning its attention to fuel poverty. He said the aim is to do the same with water and other costs that hold people back.

4. The fuel policy question. Lord Bird asked, "What if we had a fuel policy?" He asked what it would mean to guarantee fuel for everybody, so that families do not have to cut other things, such as food, to pay for energy. He argued that fuel and energy policy is among the most sensible and obvious ways to dismantle poverty, and he asked everyone in the room, especially those working in energy, to get involved in any way they can.

5. Energy projects as a route to jobs. He said Big Issue Invest is already working with people at Sellafield on jobs, and hopes to extend this to Hinkley and Sizewell. He mentioned a project it backed to help homeless people off the street, and said the organisation is working with people in the energy field to bring household energy costs down.

6. A low-wage, low-investment economy. In answer to a question, he said the UK is a low-wage, low-investment economy, partly because he sees banks directing most lending to property and only a small share to businesses. He called for an investment model in which money goes to businesses for the long term, so they do not spend half their effort raising capital. He gave the example of The Big Issue's extra annual cost from the rise in employer national insurance as one of many small pressures that chip away at the ability of small organisations to be profitable.

7. Borrowing for the long term. Lord Bird proposed that if government can borrow at a low rate for a large historic purpose, it can borrow at scale to invest in businesses and tackle poverty, repaying over 100 to 150 years through a sinking fund. He used a historic precedent of long-term government borrowing to illustrate the point.

8. The new face of hardship. He said that people who have never known poverty or homelessness, including graduates from stable backgrounds, are increasingly being pushed toward it, especially since COVID, and that every small government decision pushes more people toward the point where they cannot make ends meet. His closing request was, "Let's use your industry to dismantle poverty in one particular area": fuel poverty.

Numbers put on the table

Every figure below was stated by the speaker or an audience member during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
About 40%	Share of tax paid said to go toward maintaining people in poverty	Lord Bird
Over 2 million	Social homes said to have been sold or moved on	Lord Bird
£200 million over 20 years	Investment by Big Issue Invest	Lord Bird
£3 million	Cost of a school project for disabled children	Lord Bird
About 35 years, with about 300 people	When and how The Big Issue started	Lord Bird
About £150,000 a year	Extra cost to The Big Issue from the national insurance rise	Lord Bird
80% property and 20% business	Lord Bird's view of where bank lending goes	Lord Bird
A further £500	Rise in the energy price cap this winter, as cited by an audience member	An audience member
Nearly £1,000 per household	Rise in council tax next year in many London boroughs, as cited by an audience member	An audience member

Audience question

What should government do about the combined hit of energy and council tax? A questioner pointed to a further £500 rise in the energy price cap this winter and a council tax rise of nearly £1,000 per household in many London boroughs, and asked what government and the fund should do to prevent a combined £1,500 pressure pushing households into poverty. Lord Bird said the traditional pattern of the inheritance of poverty is changing, with graduates and people from stable backgrounds now at risk. He said the answer is not to make poor people more comfortable but to remove the causes, and he pointed to the need for an investment model that raises wages and supports long-term business investment.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the session, and are not commitments offered by the speaker. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish a national fuel poverty prevention policy that shifts spending from emergency support to prevention, with a measurable reduction target	DESNZ, HM Treasury and the Ministry of Housing, Communities and Local Government	Within 12 months of the Declaration
2	Guarantee a protected baseline of affordable energy for the lowest-income households, through a reformed social tariff or equivalent	DESNZ and Ofgem	Proposal published within 12 months
3	Assess the combined impact of energy bills, council tax and other household costs on households at risk, before any new cost is added	HM Treasury and DESNZ	Within 12 months
4	Make jobs for disadvantaged people a feature of major energy projects such as nuclear, with local employment pathways and public reporting	Major project owners, DESNZ and the Department for Work and Pensions	Pathways agreed within 12 months
5	Expand patient social investment in energy efficiency and affordable housing, using long-term funding models	HM Treasury, DESNZ and social investors	Review published within 12 months
6	Invite the energy industry to commit specific actions on fuel poverty, with named owners and annual reporting	Energy UK and industry bodies	Industry pledge within 12 months

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DAY 2 · PANEL 9 · OVERVIEW

Who Builds Britain? The Skills, Talent and Workforce Strategy the Energy Transition Demands

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Basis:** Held under the Chatham House Rule: remarks are attributed to "a panellist" or "the chair" only.

The panel

Name	Role
Jamie East (Chair)	The Training Guy
Sarah Mintey MBE	Chief Executive Officer, Developing Experts
Louise McClelland	Chief Executive Officer, Dowds Group
Lynne Matthews FNucI	Founder & Director, LM Consultants
Huw Davies	Head of Skills for Fusion, UK Atomic Energy Authority (UKAEA)

The bottom line

The panel's message was that skills came up on every panel across the two days, and the hard part is no longer knowing that skills matter but building a delivery system that works. Panellists argued that Britain has enough data on demand and now needs to join up the many existing initiatives, give them a permanent home, and scale up routes into work, especially through small and medium-sized employers. They agreed that without the people, the technology cannot be built.

What the panel said

1. From reports to delivery. The chair opened by saying skills has been part of every panel and the question is what to do about it. A panellist said there is now enough data to see the trends and gaps, and the effort should move from recreating reports to mobilising a delivery system that takes people from awareness through training into employment. Another panellist added that many initiatives already exist and do not need to be multiplied, only joined up. Panellists said they speak from delivery roles, not theory.

2. A government that is not joined up. A panellist said skills sits in silos in each department, each running its own approach, and that a joined-up solution is what is missing. A panellist described a case where two skills funding streams from the same department were being asked to do very similar things, with the teams unaware of each other. Another said national skills groups are temporary, staffed by secondees and not properly funded, and that programmes such as Destination Nuclear have no permanent home. The panel agreed there should be a hub or home for skills that is not over-governed, with clear accountability. One panellist suggested Great British Energy might be a candidate.

3. What joined-up looks like. A panellist described a cross-sector schools programme run with a dozen companies, which over 15 months and across around 6,000 schools increased the number of girls choosing nuclear as a destination career by 38%. The point was that results come when companies work together with clarity about what they want to achieve.

4. Demand for jobs is high, access is poor. A panellist said large employers see around 1,000 applicants for each graduate apprenticeship, and that young people send between 150 and 300 applications to get a first job, hearing back from only 1% to 2% of employers as AI is used to screen applications. The panellist described a virtual work experience tool that doubles as a screening tool, so young people can try careers before committing and employers can use it in early careers recruitment.

5. AI and faster learning. A panellist said AI tutoring tools could speed up learning, citing a study of around 1,500 students that reported an average gain of a year and a half in mathematics over eight weeks. The panellist asked whether such tools could shorten an apprenticeship from four years to two, and said funding rules tied to learning hours mean that learners who have passed all their modules still have to complete the hours before the college can draw down funding.

6. Education is too slow and too far from work. A panellist said institutions are not fit for modern needs, called for a GCSE in engineering and for basics such as communication and emotional intelligence to be taught, and described building an academy because the formal system moves too slowly. Another panellist noted that devolved arrangements do not work well for education in a country the size of the UK.

7. Fusion and the shape of the workforce. A panellist said the STEP programme will need a workforce of the order of 15,000 at peak, much of it in construction, and an operating workforce of around 1,500. They estimated that roughly 70% of the operating roles use skills shared across the energy sector, and about 30% are deep fusion capability. The panellist said the sector will need a centre of excellence for training, joint apprenticeships, and partnerships with colleges and universities, but noted that training capacity built by one employer with a university is often locked to that employer and cannot be shared with others.

8. Place-based and regional. Panellists disagreed on the emphasis. One argued that major projects should commit to regional employment targets and leave the region better off. Another said travel to train is a real barrier: coastal projects can mean long journeys for young people, and a panellist described an apprentice who could not afford the bus fare to a placement. The panel also noted that colleges lose lecturers to better-paid roles on major projects, and that a college-designed online apprenticeship delivery model had been dropped after a change of government. Panellists called for signposting local employers so young people see every employer on their doorstep, not only large brands.

9. Small employers are where the volume is. A panellist said big brands will not close the gap on their own. Large employers take around 500 apprentices each, while the need is for something like 50,000 a year, and that has to come from small and medium-sized enterprises taking one apprentice at a time.

10. Apprenticeship rules. A panellist said restricted funding for level 7 apprenticeships has hurt advanced science, engineering and AI, and that apprenticeship standards are too locked down to include flexible modules. Panellists called for national standards for occupational competency through Skills England. A panellist expressed concern about devolving apprenticeship funding to local councils, saying it is not clear how it would be used.

11. Sector transition and the forgotten middle. A panellist said much of the discussion focused on new entrants, whereas many people already in the workforce could move across sectors with a top-up, and

called for sector transition programmes and attention to the forgotten middle: people who have put their careers into the sector and are overlooked in favour of new entrants.

12. A message on profile. A panellist observed that workforce and skills is usually put last on conference agendas, with no keynote, even though every panel ended up talking about people. The panellist said workforce plans should be granular and set before investment decisions on every major infrastructure project, not left at a high level.

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
38%	Increase in girls choosing nuclear as a destination career, in a cross-sector programme over 15 months	A panellist
Around 6,000 schools, 12 companies	Reach and partners of that programme	A panellist
Around 1,000 applicants	Applications per graduate apprenticeship at large employers	A panellist
150 to 300 applications; 1% to 2% response	Applications a young person submits for a first job, and the share of employers who reply	A panellist
Around 1,500 students, a year and a half	Study of an AI maths tutor: average progress over eight weeks	A panellist
Four years to two years	Possible reduction in apprenticeship length with accelerated learning (an aspiration)	A panellist
Around 15,000	Workforce for the STEP programme at peak, much of it construction	A panellist
Around 1,500; about 70% and 30%	Operating workforce, split between shared energy skills and deep fusion skills	A panellist
500 against 50,000 a year	Apprentices a large employer takes, against the volume a panellist said is needed from small and medium-sized employers	A panellist

Messages from the panel

- **Join it up.** One home and one plan for energy skills, with permanent funding and clear accountability.
- **Plan the workforce before the investment.** Every major project should publish a granular skills plan.
- **Scale through small employers.** The volume of apprenticeships will come from small and medium-sized enterprises.
- **Fix the rules.** Make apprenticeship standards and funding more flexible, including level 7 and hours-based funding.
- **Don't forget existing workers.** Sector transition and the forgotten middle need as much attention as new entrants.
- **Be practical and brave.** Employers should not wait for government and should start training people now.

Audience questions

1. **How do we put glue between all these initiatives?** A questioner with a background in funding skills asked how to bring together many overlapping skills efforts. A panellist said the landscape has become more complicated as it has been simplified, that there is no single owner, and that national skills groups are temporary and under-resourced. The panellist said a hub with accountability is needed, and noted a view that a more centralised and joined-up approach is one reason other countries are ahead. Another panellist said the answer starts with the basic curriculum and raised concern about devolving apprenticeship funds to local councils.
2. **How do we bridge sector transition?** A questioner asked how people retrained for new sectors such as solar can find jobs when employers want experienced workers, and how to plan for jobs lost to AI. A panellist raised the need for employers to share the cost of top-ups and for government frameworks to look two steps ahead.
3. **A practical example.** A questioner described a programme with the Department for Work and Pensions that gives people on benefits a Level 3 AI qualification and puts them in front of local employers. The questioner said participants have gone into secure jobs, employers have asked for more, and the department has asked for the programme to be rolled out. The questioner said the cost per person is far below the cost of benefits.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the panel's discussion, and are not commitments offered by panellists. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish a single national energy skills delivery plan, with a named owner and a permanent, funded home for the skills bodies currently run on secondments	DESNZ, Skills England and the Department for Education	Within 12 months of the Declaration
2	Require a granular workforce and skills plan for every major energy infrastructure project before final investment decision	Project owners, DESNZ and HM Treasury	Requirement set within 12 months
3	Reform apprenticeships: flexible standards, restored level 7 funding for advanced science, engineering and AI, and a review of hours-based funding so learners can complete when competent	Department for Education and Skills England	Review published within 12 months
4	Set a target and incentives for apprenticeship starts by small and medium-sized employers in the energy supply chain	Department for Education, Skills England and industry	Target within 12 months
5	Launch sector transition programmes for existing workers, including the forgotten middle, with shared funding between employers and government	Skills England and the Department for Work and Pensions	Programme launched within 12 months
6	Open training centres of excellence and joint apprenticeship programmes across employers, and address retention of college lecturers	Department for Education, FE colleges and employers	Framework within 12 months
7	Fund travel-to-train and local employer signposting for projects in remote and coastal areas	Local authorities, project owners and the Department for Education	Pilots within 12 months

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DAY 2 · PANEL 10 · OVERVIEW

Decarbonise to Dominate: How Britain's Industrial Heartlands Become the Clean Energy Manufacturing Powerhouse of Europe

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) · Final panel before the closing debate **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Basis:** Held under the Chatham House Rule: remarks are attributed to "a panellist" or "the chair" only.

The panel

Name	Role
Chris Gilbert (Chair)	Director, Decarbonisation Consulting Ltd
Chris Rowell	Head of Net Zero, Tees Valley Combined Authority
Elizabeth de Jong	Chief Executive Officer, Fuels Industry UK
Ewen Cairns	Director, London, DWF

The bottom line

The panel's message was that decarbonising industry and keeping industry in Britain are the same task, and that the real risk is not choosing between them but losing both through inaction. Panellists said progress on the first two carbon capture clusters is real and encouraging, but refineries, chemicals and smaller industrial sites are being squeezed by rising carbon costs while investment goes overseas. They called for dates, decisions and a national plan so investors can commit.

What the panel said

1. Stick or twist: why a domestic industrial base matters. The chair framed the question as de-industrialisation versus decarbonisation. A panellist argued that foundational industries are essential for energy security, jobs and growth: fuels are around 47% of UK energy needs and are required for all aviation and nearly all road transport. The panellist said that if UK production simply closes, global emissions rise, because the fuel made here is lower in carbon than most of what would be imported, and that carbon capture needs anchor customers such as refineries. Another panellist preferred the word re-industrialisation, which the government has also used.

2. Lessons from de-industrialisation. A panellist pointed to the 2015 closure of a major steelworks, which cost around 3,000 jobs overnight and thousands more in the supply chain, and said the decline was driven by inaction across multiple decades and a changing international market, not one cause. A panellist said that for every job lost in a refinery closure, around five are lost in the supply chain. Panellists said re-industrialisation does not stand alone: it needs inputs, outputs and people to run it.

3. A report card on the clusters. The chair noted that government support for carbon capture is substantial and that two projects, on Teesside and in the North West, have reached final investment decision. Panellists said the picture is positive overall but nuanced by sector. Carbon capture is progressing, and more is needed. Large-scale hydrogen is not yet happening at scale, though small local electrolysers next to a heat user are working. Sustainable fuels and related new chemicals were described as the most exciting opportunity, with biogenic CO2 from waste, biomass and biomethane giving the building blocks for sustainable aviation fuel. One panellist said the UK has no plan to transform its chemical industry. Another noted the supply chain opportunity from offshore wind off the east coast.

4. Refineries under pressure. A panellist described the closure of refineries from nine in 2000 to six last year and four now, and said another panellist could remember sixteen forty years ago. The panellist said carbon costs keep rising but the options to decarbonise have not progressed at the same pace, and that carbon capture projects are too big and complex for any single refinery to carry. The result, they said, is carbon leakage: production closes here, fuel is made elsewhere, and the jobs go. They contrasted the UK with the US, where they said carbon costs are zero and fuel investment is flowing, and called the current approach back to front.

5. The carbon border adjustment glimmer. A panellist explained that a carbon border adjustment mechanism covering seven sectors starts in January 2027, that refined products were initially not included because there was no method to measure carbon intensity, and that the budget last week announced they will now be included. There is no date yet and a consultation is open. The panellist urged the audience to respond. Another panellist stressed that the integrity of the emissions trading system should be protected while the system is improved so that it genuinely stimulates investment.

6. A country that makes things. A panellist argued that the aim is to be a beneficiary of the global energy transition, not a recipient of it, and that every politician says the country should make things. They said a modern industrial economy needs the independent ability to make steel, fuels and other materials, as a matter of industrial and energy security. The panellist noted that a transport resilience strategy published days earlier did not mention fuels, though the government's energy security work does recognise the issue.

7. Beyond the two clusters. The chair noted that roughly half of industrial emissions sit outside the clusters. Panellists pointed to emerging options for moving CO2 by road, rail and ship to storage, and to self-defined sub-clusters around single industrial sites. Several panellists noted that last week's budget protected the two main carbon capture clusters but reduced funding elsewhere, leaving private capital to step in, which they said reflects uncertainty for investors. A panellist said projects that are cheap, such as wind and solar, attract investors easily, while carbon capture still needs public support.

8. Land, power and data centres. The panel discussed competing demand for land and grid capacity in the clusters, including data centres. A panellist said the test should be which projects create long-term jobs and local supply chain opportunity, whether a power plant or a data centre. A panellist added that data centres could use waste heat and share infrastructure with industrial sites. Panellists highlighted brownfield land and ports as key assets, noting that industrial land brought back into use also keeps skills and appetite for industrial jobs in the area, and that mayors and combined authorities have a growing role.

9. Investor confidence and communities. Panellists said the simplest need is data and decisions with dates: without them, support is discussed but not real policy. One called for a national plan, and another for a clearer view of market maturity. Another said that heartland communities, with generations in shipbuilding and heavy industry, need displaced workers captured and re-skilled so that the transition rebuilds those places, not leaves them behind. The panel said the answers on skills and construction are largely known and the missing piece is investment confidence.

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
47%	Share of UK energy needs that is fuels	A panellist
100% of aviation; 97% of road transport; 61% of trains	Share of each mode that relies on fuels	A panellist
5 jobs in the supply chain per refinery job	Jobs lost in the supply chain when a refinery closes	A panellist
Around 3,000 jobs	Lost on the 2015 steelworks closure	A panellist
£22 billion	Government funding for carbon capture, as cited by the chair	The chair
2 projects	Carbon capture projects at final investment decision (Teesside and the North West)	The chair
9, then 6, then 4 refineries	Refineries in 2000, last year and now	A panellist
16 refineries	Refineries in the UK 40 years ago	A panellist
About £13 million, £200 million, £400 million, £600 million	Refinery carbon costs: 2009, now, and projected for 2028 and 2030	A panellist
7 sectors from January 2027	Sectors covered by the carbon border adjustment mechanism's first phase	A panellist
Around half	Share of industrial emissions outside the clusters	The chair

Messages from the panel

- **Treat decarbonisation and industry as one job.** Closing UK production raises global emissions and loses the jobs.
- **Give dates.** Investors need decision dates, especially on the carbon border adjustment mechanism for refined products.
- **Back more than two clusters.** Smaller sites need carbon capture routes, including non-pipeline transport of CO2.
- **Have a plan.** A national plan for the future of foundational industries, including chemicals and fuels.
- **Share the successes.** The panel's closing ask was to promote what is working so that uncertainty about new technologies recedes.

Audience question

What about waste as a feedstock? A questioner asked whether waste is being considered for use in manufacturing and alternative fuels. A panellist said waste regulation makes it harder to use waste in fuels in the UK than in other countries, from used tyres to furniture, and that this affects competitiveness. Another panellist said energy from waste is not growing and that waste is an increasingly valuable commodity, with biogenic CO2 from waste facilities offering a building block for new industry. A panellist added that energy from waste still needs an end user for its output.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the panel's discussion, and are not commitments offered by panellists. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Publish the start date and scope of the carbon border adjustment mechanism for refined products and other exposed sectors	HM Treasury and DESNZ	Within 12 months of the Declaration
2	Review the competitiveness impact of carbon pricing on refining, chemicals and other foundational industries, to prevent carbon leakage	DESNZ and HM Treasury	Review published within 12 months
3	Set out the route and funding for carbon capture beyond the first two clusters, including non-pipeline CO2 transport	DESNZ	Within 12 months
4	Publish a national plan for foundational industries, covering steel, chemicals, fuels and sustainable aviation fuel, with decision dates	Department for Business and Trade and DESNZ	Within 12 months
5	Assess and publish the strategic need for domestic fuel production and ensure fuels are covered in energy and transport resilience strategies	DESNZ and the Department for Transport	Within 12 months
6	Simplify rules for using waste as a feedstock in fuels and chemicals, in line with competitor countries	Defra, the Environment Agency and DESNZ	Reform proposals within 12 months
7	Prioritise brownfield land, ports and grid access for projects with the strongest local supply chain and long-term jobs, working with mayors	Ministry of Housing, Communities and Local Government, combined authorities and Ofgem	Within 12 months

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DAY 2 · CLOSING DEBATE · OVERVIEW

Stop Talking. Start Building. The Energy Sector's Pledge to Britain

Event: ELUK2026, Butchers' Hall, London · Day 2 (4 November 2026) · Closing debate of the conference **Theme:** The Energy Trilemma: Britain's Three-Front War It Cannot Afford to Lose **Session sponsor:** J Coffey Data Centres & Energy **Basis:** A closing debate, so names and quotes are used. The chair told the room that questions raised in the session would go into the Declaration.

The panel

Name	Role
Eva Robson (Chair)	Business Development Director, J Coffey Data Centres & Energy
Juliette Sanders	Chief Communications Officer, Energy UK
Abbie Badcock-Broe	Formerly Head of Corporate, UK & Decarbonisation Strategy, National Grid
Carol Yan	General Manager, Energy, Utilities and Industrials, UKI, Amazon Web Services

The bottom line

The closing panel's message was that Britain already knows what to build and is building it, and the work now is to remove the friction that slows delivery: connections, planning, supply chains, an unstable policy framework, and the lack of one accountable owner for the whole energy system. The panel agreed on four things: electricity bills must come down and support must be targeted; connection and planning reform must deliver on stated dates; technology and flexibility, including from data centres, need to be built in from the start; and government and the sector need to talk to the public in plain language about why costs are as they are.

How Day 2 builds on the six Day 1 actions

The Day 1 closing debate produced six actions to carry into this session. The table sets out how this debate and the day's panels build on each.

#	Day 1 action	What Day 2 added
1	A national deployment pathway of five years and beyond, owned by the Department for Energy Security and Net Zero, with work starting within six months	The panel named the dates that would feed it: the draft Strategic Spatial Energy Plan (key milestone in January), the connections reform gate decisions and the next offshore wind allocation round. The audience asked who owns the whole system, and the panel agreed this is still unresolved
2	Deployment must be ready for flexibility, in the next price control	Abbie Badcock-Broe described data centres acting as flexible grid assets, with a demonstration that responded to simulated network events in seconds. Carol Yan said her sector is open to a flexibility conversation if it is designed with them. The distribution price control is around 18 months away
3	Double annual heat pump installations and work on insulation	The panel focused on affordability and electrification: Juliette Sanders said electricity bills must fall and policy costs should be removed so that households and businesses can electrify, and that policy changes such as to the Warm Homes Plan harm investment
4	Government to enable SMEs to work with developers to increase pace	The panel stressed supply chain order books, manufacturing backlogs and modular construction as the route to faster delivery, and the chair opened the floor to the SME and sector voices in the room
5	Positive education, communication and engagement	Juliette Sanders called for a different, real conversation with the public in plain language, ahead of things happening
6	Developers maximise the opportunity of the Future Homes Standard	Not directly revisited on Day 2; carried forward from Day 1

The Day 1 theme of whole-systems thinking returned in the audience's central question: who owns and defines the system?

What the panel said

1. The ask: build faster. Eva Robson set the scene by pointing to the investment expected in network upgrades before 2030, which she put at around £100 billion. She asked each panellist for the one thing needed to accelerate delivery and who owns it. She noted that her company builds substations of the same size for data centres as are needed for the grid, and said projects under grid frameworks are slower.

2. "We have done well on building." Juliette Sanders said she had a problem with the title of the session because the sector has delivered: members have invested over £100 billion in clean energy since the last general election and the system is running at very high levels of clean electricity. She said the next phase is to maximise that clean power for customers, with a stable investment framework, and the enablers of investment such as skills and planning. Her one ask of government was to bring down electricity bills, in part by removing policy costs, because that unlocks electrification.

3. Friction from data centres, on purpose. Carol Yan said data centres can no longer be separated from the grid conversation. She said data centre operators bring a commercial speed of months to counterparties used to years, and that this friction is sometimes the right friction to challenge what has been accepted as standard. She argued that technology is too often added after the capital is spent, when most of the chance to optimise has gone, and that the sector should ask how to build in weeks, then days, and how to modularise. She described how the data centre approach has shifted: five years ago the logic was to build near cities, but access to power is now the first question in every conversation, so the limiting factor is power, not people or location. Her company's own goal has moved from 100% renewable to 100% carbon-free.

4. A transformation fifteen years overdue. Abbie Badcock-Broe said the energy system is going through a transformation that is at least fifteen years overdue because of under-investment, and is decentralising, decarbonising, democratising and digitalising at once. She said it is messy and always was going to be. She named the reforms in play: connections reform, planning reform, supply chain and digital enablement. She

said it matters to build only what is needed and fits the country's plan, not what satisfies a single project pipeline.

5. Dates to watch. Abbie Badcock-Broe listed what is coming. The draft Strategic Spatial Energy Plan has been submitted, and she called January a key milestone. Connections reform will move from the "zombie queue" of first come, first served to what she called "first ready, first connect". The next offshore wind round will only make sense if projects can connect. The budget showed government is taking it seriously.

6. Supply chain and manufacturing. Abbie Badcock-Broe said supply chains need multi-year order books to invest, and described a manufacturer running at high capacity yet with an order backlog it could not fulfil. Transmission lines currently take 14 to 15 years to build, mostly because of planning, and reform aims to cut that to seven. Demand for equipment has risen globally, so supply remains tight.

7. Innovation from sandbox to business as usual. Abbie Badcock-Broe said it is easy to innovate in a sandbox but hard to move into critical national infrastructure, and has to be, because safety, resilience and reliability cannot be negotiated. She said better data across networks lets operators get more from existing assets, and that rapid and phased connections, such as connecting to distribution first while transmission is built, can bring forward projects.

8. Learning from other sectors and countries. Juliette Sanders said offshore wind shows the sector can innovate: the world's largest offshore wind farm took eight years to plan, but its 174 turbines went up in one summer, which she used to argue for removing unnecessary red tape. She noted that other countries use different approaches to the connection queue: France uses a use-it-or-lose-it first-come model, and some countries have allocated capacity for data centres or introduced priority systems that left them out. She said the UK should pick the best elements from each, and welcomed the data centre measures in the budget while noting that the detail will matter. She also said speed must be balanced with cumulative environmental impact and bringing the public along.

9. Data centres as flexible assets. Abbie Badcock-Broe described a technology that identifies a data centre's essential compute and therefore how much load can flex, which she said could be a large share of capacity. A UK demonstration with a data centre connecting to a London distribution network simulated 200 network events and the response took seconds. She said it is already being rolled out with network operators in the US and internationally. Carol Yan said her sector is open to grid-scale flexibility if the conversation is held with them, because customers need very high reliability.

10. Energy independence means secure, not self-sufficient. Panellists said the UK has burned through its fossil fuel reserves and is an electro state that must electrify as far as it can. Both Juliette Sanders and Abbie Badcock-Broe said energy independence is about having a secure system, not generating everything at home, and that interconnectors and links with European neighbours remain important.

11. Stop, start, do differently. Each panellist was asked what government should stop, start and do differently:

Panellist	Stop	Start	Do differently
Juliette Sanders	Stop changing policy, because it hits investment and small businesses trying to scale	Target financial support for energy bills meaningfully, rather than universal discounts	Have a different, real conversation with the public in plain language, ahead of things happening
Carol Yan	Accepting that industry standard is good enough	Bring the right people together in the ecosystem and open up conversations on flexibility	Be a change starter in whichever part of the value chain you sit in
Abbie Badcock-Broe	Trading the long term for the short term	Collaborate better across government so signals are joined up	Define the long-term goal and invest now for a successful energy system

Numbers put on the table

Every figure below was stated by a panellist or the chair during the session. They have not been independently verified by Energise Landscape or ELUK2026, and responsibility for their accuracy rests with the speaker.

Figure	Context	Stated by
About £100 billion	Network upgrade spend expected before 2030	Eva Robson
Over £100 billion	Investment in clean energy by Energy UK members since the last general election	Juliette Sanders
98.8%	Clean electricity, as stated	Juliette Sanders
£36 billion	Spent on universal support in the last energy crisis	Juliette Sanders
£100 discount against a £400 bill rise	Government bill support against the rise due in January	Juliette Sanders
14 to 15 years, aiming for seven	Time to build a transmission line, and the target under planning reform	Abbie Badcock-Broe
174 turbines in one summer	Installation of the world's largest offshore wind farm, after eight years of planning	Juliette Sanders
200 events, response in seconds	UK demonstration of a data centre acting as a flexible grid asset	Abbie Badcock-Broe
About 40% essential compute	Example of the share of data centre compute that cannot flex	Abbie Badcock-Broe
Over three times	Size of the generation queue and of the demand queue against what the country needs	Abbie Badcock-Broe
18 months	Time until the next distribution price control period starts	Abbie Badcock-Broe

Audience questions

The chair told the room that the questions would go into the Declaration. The questioners' names are not recorded.

1. **Who owns and defines the whole energy system?** An audience member said that everyone in the room knows what is needed and asked who owns it, given the silos inside government, and how to stop the political cycle from undoing a 10- to 20-year plan. Abbie Badcock-Broe said the National Energy System Operator was created to be architect and orchestrator with a long-term vision grounded in engineering. She said the regulator has a role in protecting customers in monopoly parts of the system, that competition in networks is increasing, and that risk ownership should be financially rewarded. Juliette Sanders said it is not possible to identify one owner today, that the roles of government departments and bodies are still being worked out, and that government should set the long-term direction as it did with the 2030 clean power target while the private sector delivers. She said public control can take many forms, from community ownership to state-backed models, not only nationalisation.
2. **How do we cope with political short-termism?** Juliette Sanders said the sector has to prepare for a wide range of political outcomes at the next election, from public control to scrapping climate legislation and renewable subsidies. She said all parties can align on energy security, so the sector should frame its case around a secure grid at the lowest cost, which also happens to be clean, and position for any scenario. She said the sector should be wary of asking for structures that might not align with its aims in future. Another audience member argued that the country needs a body that gives developers and investors ten years of predictability, with cross-party consensus.

3. **Which body is responsible for managing the delivery of the grid build-out?** Abbie Badcock-Broe said the delivery onus is on the network operators, within regulated price controls. She said the transmission plan is already underway, the distribution plan is around 18 months away, and the transmission owners are coordinating their supply chain orders across all three networks. She said most of the large organisations are delivering and innovating, with external supply chain risk remaining.
4. **How do energy, transport and water plan together?** An audience member said energy has to work with other utilities, but no forum exists where they plan together, and gave an example of transport plans that did not consider grid headroom. The audience member said plans exist but nobody can hold others to account. Juliette Sanders suggested the regulatory system needs something like a single route-finder across its many bodies.
5. **What about the queues?** Abbie Badcock-Broe said that if every project in the generation queue were built, supply would exceed what the country needs by more than three times, and the demand queue is similar, so a reality check is under way. She encouraged projects that can self-fund to proceed and not wait for large reinforcements, and said the plan will have to be iterative.

Proposed Declaration commitments

These are Energise Landscape's synthesis, drawn from the closing debate, and are not commitments offered by the panellists. Where a commitment builds on a Day 1 action, that is noted. The lead bodies and deadlines below are proposals for the Declaration.

#	Proposed commitment	Proposed lead	Proposed deadline
1	Name one accountable owner for the whole energy system plan, with agreed roles across government departments, the system operator and the regulator, and a plan that carries across the electoral cycle	UK Government, led by DESNZ with HM Treasury	Owner and roles published within 12 months of the Declaration
2	Publish the national deployment pathway (Day 1 action 1), tied to the Strategic Spatial Energy Plan, the connections reform timetable and the offshore wind allocation rounds	DESNZ	Work started within six months; pathway published within 12 months
3	Deliver connections reform on the stated dates, including first ready, first connect, with published priority rules for strategic demand such as data centres	Ofgem, DESNZ and the network operators	Decisions implemented within 12 months
4	Halve transmission build times from 14 to 15 years to seven through planning reform, with supply chain orders coordinated across the three transmission owners	DESNZ, Ofgem and the transmission owners	Planning milestones within 12 months
5	Bring down electricity bills by removing policy costs from electricity and rebalancing levies, so that electrification is affordable	HM Treasury and DESNZ	Decision within 12 months
6	Replace universal bill discounts with targeted support for households that need it	HM Treasury, DESNZ and the Department for Work and Pensions	In place before next winter
7	Build flexibility into new connections (Day 1 action 2), including a framework for data centres to act as flexible grid assets in return for faster connection	Ofgem, DESNZ and data centre operators	Framework within 12 months
8	Create a route to move proven innovation from pilot to business as usual on critical infrastructure, and require technology and digital optimisation to be considered at the design stage of major projects	Ofgem, DESNZ and project owners	Route within 12 months
9	Commit to policy stability: no retrospective changes to long-lead energy policies without consultation, so that investors and small businesses can plan	HM Treasury and DESNZ	Protocol published within 12 months

#	Proposed commitment	Proposed lead	Proposed deadline
10	Run a plain-language public campaign on why energy costs are as they are and what the transition delivers (Day 1 action 5)	Energy UK and the sector, with DESNZ	Launched within six months
11	Set up a cross-utility planning forum covering electricity, transport, water and heat, with shared data on grid headroom and a way to hold bodies to account for joined-up plans	DESNZ, the Department for Transport and Defra	Forum established within 12 months

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IN THEIR WORDS

Testimonials & socials

Delegates, exhibitors, partners and media on LinkedIn after ELUK2026. Select a link to read the full post.

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Wolfe Power Club
ELUK2026 Official Media Partner
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"The UK has no shortage of energy ambition or industrial opportunity. What it needs is greater alignment between policy, investment, infrastructure and the commercial realities of delivery."

Mark Selby
Founding Editor, New Energy Weekly · Panel 2 chair
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"Energy security is too important to run on a five-year political clock."

Deepika Banerjee MIET
Delegate
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"We're all set up and ready to go at ELUK 2026! We're looking forward to meeting businesses, industry contacts and fellow exhibitors."

Martin McCammon
Account Director, The Energy Group
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"Behind every data centre sits an investment decision, so grid access is a funding and delivery risk as much as an engineering one."

Andrew Fraser
Director, Moore Insight · Panel 4 panellist
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"Second day at ELUK2026. Looking forward to hearing more about communication, collaboration and unlocking barriers."

Rebecca Haniak
Chief of Staff to the CEO, Sellafield Ltd
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"The real strategic opportunity is turning that experience and supply chain into a repeatable model for UK nuclear delivery."

Lynne Matthews FNucI
Founder, LM Consultants · Panel 9 panellist
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"Perhaps my biggest takeaway was the need for greater simplicity, collaboration and a genuinely joined-up approach."

Alex Davis MBA
Business Development Lead, Moore Insight
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"We're proud to have sponsored and been a part of the ELUK2026 event this week in London, bringing together policymakers, investors, regulators and industry leaders."

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"The range of the agenda is what stuck with me, all in one room, with industries that don't normally share a stage."

Tom Reynolds
Founder, Flow Vendor · AI Adoption Partner
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"Tuesday was ELUK, in a hall with more chandeliers than I'm used to."

Paul Meersman
Commercial Strategy Consultant
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"A huge thanks to Andy Beales and Rekha Kaur for hosting a belting event with ELUK26. Great panels and discussion."

Stephen Todd
Delegate
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"ELUK2026 seeks to tackle the big issues around how Britain builds a cleaner, more secure energy system and how to fund it and overcome the obstacles."

EUA Utility Networks
Association Partner
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Dr Elina Militello Asp
Scenario Team Lead, UKAEA · Panel 6 panellist
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"There were lots of insightful discussions, it's been great connecting with colleagues and industry peers."

Tabassum Ferdous
B2B Marketing Specialist, LRQA
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"Net Zero debate showed how the cost of energy, energy security and growing future sustainability is being thought about in some detail."

Renewable Transport Fuel Association
RTFA
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Sponsor, exhibit, speak, sign the Declaration or join us at ELUKE2027 and ELAPAC2027. Talk to the team.

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