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July 2024

Healing a fragmented state

How Labour's plan for 2030 power decarbonisation can be delivered

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Foreword

The new Government's commitment to decarbonising the UK's power system by 2030 is one of the most ambitious climate pledges in the Western world. It will involve building infrastructure at an unprecedented pace, reengineering the way the UK sources its electricity from the ground up. The pace of this ambition could blaze a trail for other nations to follow.

Project Tempo is pleased to support this Stonehaven paper exploring the changes that the new Government will need to make to the regulatory framework to achieve this goal – and the politics of making it happen. The paper recommends a set of changes that represent almost a revolution in how the UK delivers major projects, changes that will help not just deliver decarbonisation goals but could potentially unlock economic growth too.

Project Tempo believes that the right approach to decarbonisation is one that grows the economy and one that creates opportunities for those who feel left behind by today's economic and political system. The growth, the jobs and the investment that the Government's bold target could unlock can be part of this - if the Government can deliver.

Pandora Lefroy, CEO of Project Tempo

We have reached a critical juncture in Britain with regards to energy infrastructure. The new Government's plan to decarbonise power by 2030 is both ambitious and achievable, but if it is to meet their target of green energy in six years, then radical action is needed to tackle planning delay which are preventing vital developments from taking place.

What we need is a National Energy Plan to streamline the process, making sure that new infrastructure is built in the right areas where the local appetite is strong and the development appropriate.

Against a backdrop of growing public frustration with the glacial pace of development, the incoming government have unique opportunity to encourage new developments to take place in areas across the country which are crying out for jobs and investment. They must grasp it with both hands.

Adam Bell, Director of Policy at Stonehaven



About the Author

Adam is one of Britain's leading experts on energy and decarbonisation policy, and is regularly featured in print and broadcast media.

He is Director of Policy at Stonehaven, joining from BEIS, where as Head of Energy Strategy he worked on the 2020 Energy White Paper, and in earlier roles on heat decarbonisation strategy and on CFD auction design.



Key Recommendations

1

Develop a new National Energy Plan at pace

Delivering the volume of new electricity generation required to meet the 2030 target will require radical action to tackle planning. We recommend that the Government tasks the National Energy System Operator with creating a new National Energy Plan, specifying the location, technology and scale of infrastructure projects.

2

Pre-approve projects in the National Energy Plan

Each project included in the Plan should be given the automatic status of an approved Development Consent Order (DCO). To manage the risk that these projects are subject to legal action, we recommend reforming judicial review such that any such DCO can only be subject to review on administrative grounds.

3

Bundle end-to-end permissions into the pre-approval

For new projects in the National Energy Plan, we recommend bundling together appropriate permissions and support mechanisms. For offshore wind projects, for example, this would mean bundling together seabed leasing and Contracts for Difference into a single action. This process would be analogous to the Danish model of offshore wind deployment.

The Challenge

01

Global emissions will need to decline by 50% by 2030, compared to 2020 levels in order to maximise our chances of holding warming under 1.5C.[1] But the politics of such a rapid transition are challenging. To maintain public buy-in, the costs of change will need to fall on the broadest shoulders, and the opportunities it unlocks must be spread as widely as possible.

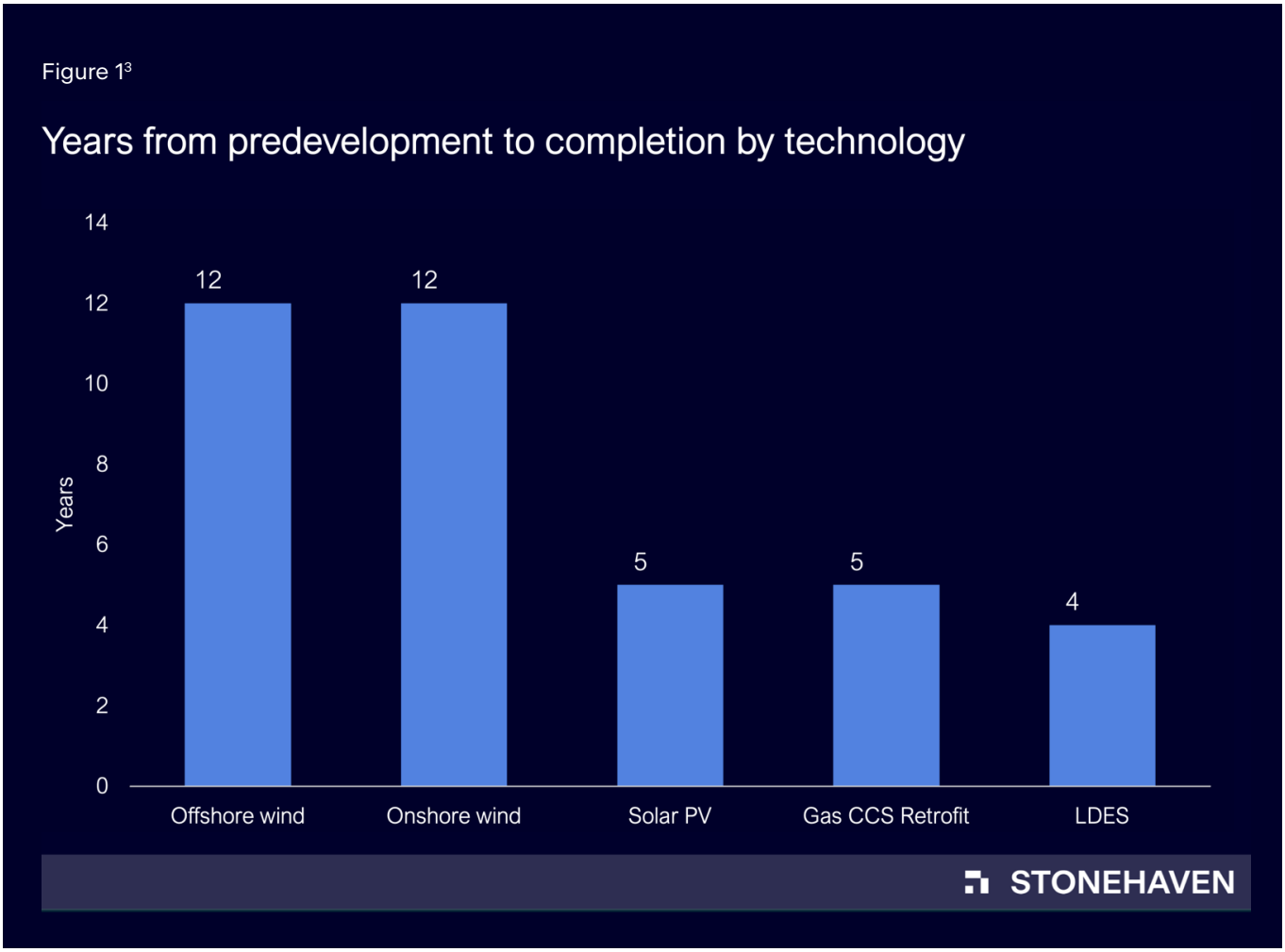
The new Labour Government announced its plan to implement a 2030 power decarbonisation target at its 2022 party conference in Liverpool.[2] This brought forward the then Conservative Government's target of power sector decarbonisation by 2035, by a further five years. The new Government intends[3] that while the power system as a whole would be decarbonised, gas back-up will be retained for extended periods of low wind and low sun.

This domestic target could have global ramifications. If power sector decarbonisation can be delivered while maintaining popular support, it would send a positive signal to other countries about the benefits of faster action on climate change. Creating a policy pathway for the delivery of the 2030 target that maximises growth and minimises costs would help engender a new coalition for rapid climate action.

To get to Clean Power by 2030, Stonehaven analysis indicates that the Government will need to deliver a further:

- 2GW of gas carbon capture and storage (CCS)
- 4GW of long duration energy storage (LDES)
- 25GW of offshore wind
- 10GW of onshore wind
- 20GW of solar
- Transmission capacity to hook up new generation: ~500km of onshore capacity and ~2000km of subsea cables.

Figure 1[3]



While these projects are already in the pipeline for 2035, accelerating delivery to 2030 will necessitate new, shorter, delivery pathways. Figure 1 outlines the time to deliver for standard projects in these classes.

With the new Government having taken office in July 2024, delivery of the capacity set out above under standard timelines would not be fast enough to meet the 2030 target. It will need to consider how to manage barriers to accelerated delivery, especially planning. The purpose of this paper is to therefore do two things:

1) Identify a very rapid, non-standard route for delivery of these projects, including considering how costs can be held down when so many projects are being brought forward at the same time, and;

2) Identify which features of this delivery route could form part of an enduring planning regime for infrastructure beyond 2030.

This work is undertaken against a backdrop of rising discontent at how long it takes to build new projects in Britain. The new Government has a unique opportunity to reshape the regulatory landscape to deliver projects more quickly and thus unlock more investment and more economic growth. The 2030 target constitutes an organising principle for these efforts: a mechanism through which more rapid change can be delivered, rather than a purely administrative endeavour.

What's wrong with the status quo?

02

Below, we outline the standardised route for electricity generation and transmission projects:

Inception
Site selection & headline design

Consenting
Development Consent Order (DCO) process for Nationally Significant Infrastructure Projects or planning consent via the local planning authority. This includes environmental impact assessments and other similar stipulations, such as archaeological surveys.

Grid connection
Applying for connection to relevant substation or transmission system; contracting & design for projects subject to OFTO.[5]

Design
Commissioning of FEED and final design

Contracting
Purchase of components through vendors or allocation through internal routes

Financing
Securing finance either from balance sheet or external equity & debt providers

FID
Final decision to proceed

Construction
In-situ development of project

Operation



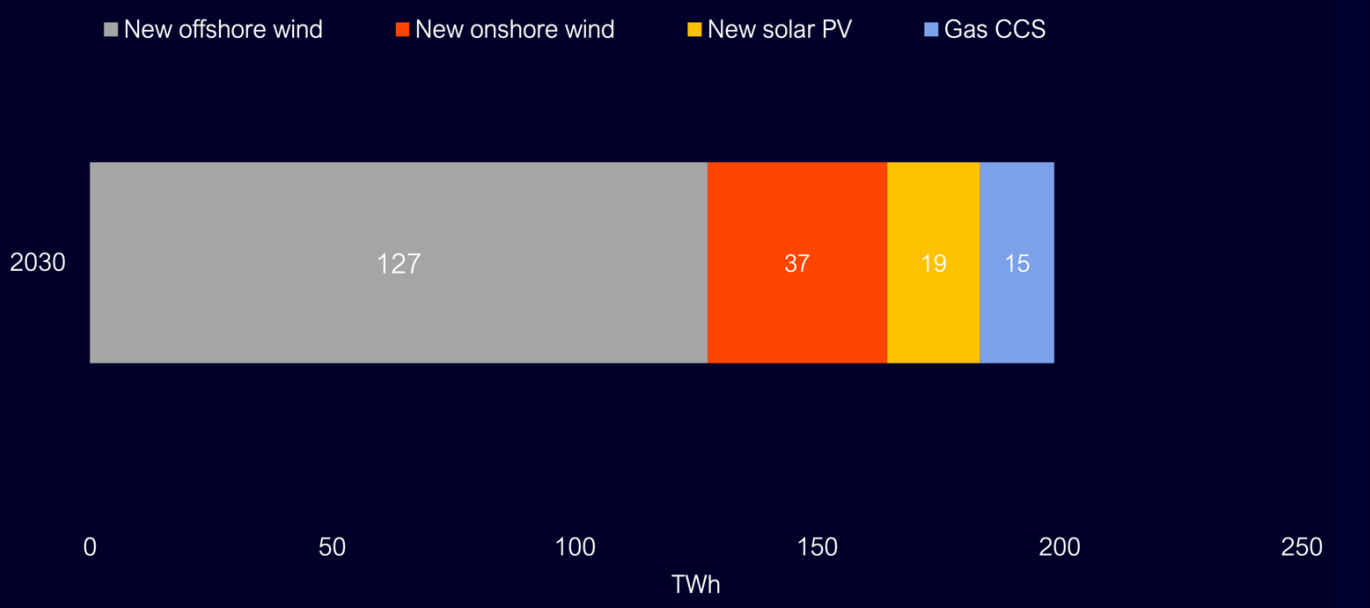
By itself, the consenting stage alone can last 5-6 years for an offshore wind project, requiring considerable investment of capital for a project that may not proceed to FID.

While there is an existing pipeline of projects already working through the DCO process, the additional volume required to hit the 2030 target (over and above existing projects) represents nearly 200TWh of output and at least 16GW of additional firm generation (Figures 2 and 3).

The amount of additional firm generation we require could increase to 32GW if we assume that the 'derated' value of renewables decreases further as more wind and solar enter the system. The 'derated' value of renewables is the statistical minimum value of capacity expected to be outputting during a system stress event. The most important event relevant for this evaluation is a 'dunkelflaute' – a period of very low wind and overcast skies that can extend for several days and severely reduce output from renewable generation.

Figure 2

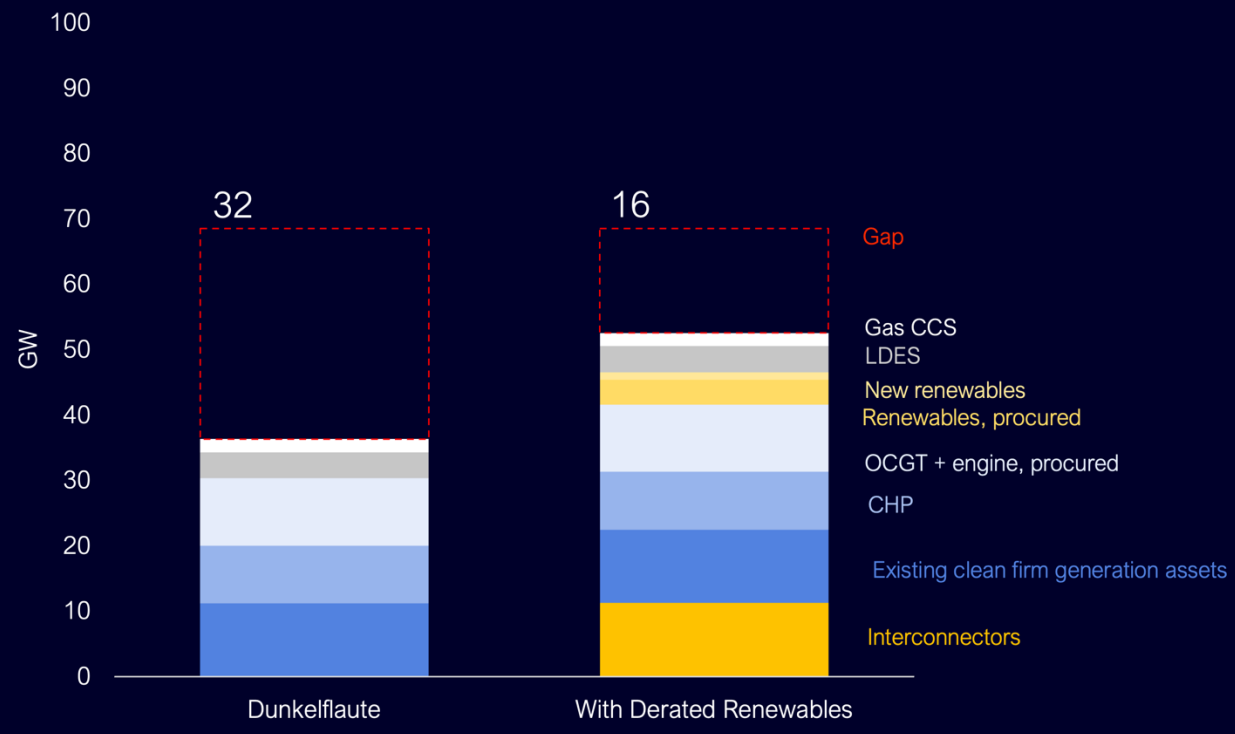
Additional generation output required to deliver 2030 target under reasonable least cost assumptions



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Figure 3

Firm capacity required to ensure system security under 2030 target



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The above figures already make assumptions that might be challenging, particularly around the longevity of **existing nuclear assets**. Sizewell B will at some stage require its midlife retrofit, but is currently on course to be the only remaining major generator not in receipt of Government support and fully exposed to market costs. Lifetime extensions for Heysham 2 and Torness are contingent upon sign-off from the Office for Nuclear Regulation, which is not guaranteed. Therefore, accelerating the delivery of Hinkley Point C to have at least one reactor operational before 2030 would provide a considerable boost. The combined 6.4GW of Hinkley Point C and Sizewell C will not be ready for 2030 but will be essential in the following decade to meet demand as heat and transport electrifies.

Gas power generation with carbon capture and storage is underway, but has yet to be deployed, and meeting the fixed capacity target is likely to require going faster than current plans. Various projects, such as Net Zero Teeside, have already been granted Development Consent Orders and the final investment decision on these projects is expected to come before the end of the year.

While **interconnectors** are derated in a similar manner to renewables, their role in a decarbonised 2030 system is key. In the absence of peaking gas plants, DESNZ has estimated that they are likely to set the marginal price of power up to 90% of the time. However, despite an ambitious target of 18GW of interconnection in play by 2030, the delivery of these projects has been significantly impeded by Brexit. Interconnectors are no longer subject to the EU's Projects of Common Interest framework and are instead once again subject to political negotiations between nation states. The regulator Ofgem, responsible for their delivery, has been slow to wake up to this new reality.

Battery storage has risen from a very low base to 3.5GW, equivalent in instantaneous output to a large nuclear plant. It will provide a crucial role in managing daily fluctuations in output from renewables, and one of unprecedented scale – there are currently over 80GW of battery projects in the pipeline . While not all of these projects will be built, they will have an unprecedented impact on the economics of a renewables-heavy power system.

Long Duration Energy Storage currently only exists as a meaningful technological category in the shape of pumped hydro. However, multiple new projects are seeking to enter the market. These involve various kinds of mechanical stores including compressed air as well as larger lithium ion batteries. Many of these can be delivered by 2030 if the right framework is put in place.

While the focus of this paper is on large-scale energy assets, action at the domestic level could also benefit delivery – not least through **solar PV** reducing demand from electric heating and electric vehicles. Its deployment faces a number of unhelpful obstacles and we will return to it in subsequent work.

With all of the above taken into account, it should be clear that the Government faces a significant challenge. At current build rates, we would not expect to deliver this volume of generation until 2045. Tackling this will mean bearing down on the stages where Government can meaningfully influence timescales. This includes inception, consenting and financing.



The Fragmented State

03

The UK's regulatory regime is not designed around minimising timescales; quite the opposite. The Government has found that the time taken to deliver infrastructure projects has nearly doubled over the last two decades. This is a function of a number of related phenomena:

The UK's regulatory system is intentionally structured to enable considerable judgement to be exercised by developers; for example, 'material considerations' within the planning system are things to which a developer should have regard, such as visual amenity, but have no statutory definition and instead arise from case law. However, whether a given plan is compliant with the law remains a simple binary proposition and thus is subject to legal risk. There is not a concept of compliance on a sliding scale; any given development can therefore be subject to judicial review. This means that as case law progresses developers are subject to novel compliance risks that they seek to manage through excessive preparation and analysis. The environmental impact assessment and environmental scoping documents for a single wind farm off the North East coast ran to 13,275 pages, for example.

The regulatory system, despite its complexity, is not a monolith and is instead comprised of statutes issued by a range of central Government departments and agencies with overlapping responsibilities and goals. For example, the gas CCS plants needed to meet the 2030 target will be subject to both the DCO process and a separate environmental permitting process. This means that a single development can be subject to multiple decision-points, any of which can be delayed by an agency starved of resource or with no existing policy that covers that development.

Economic regulators, those charged with regulating monopoly utilities, have been tasked over the last two decades to bear down on costs above everything else. This has created an internal position against investing ahead of need or at any kind of risk, with projects often manifesting only when it has become indisputably clear that they are required. For example, constraints over the B6 boundary on the electricity network between Scotland and England have become increasingly severe over time, driven by large volumes of wind generation. In 2012, National Grid anticipated needing between 7-12GW of connectivity over the boundary to efficiently manage the system by 2021. Ofgem's reluctance to permit investment ahead of need meant that connectivity in 2021 was 6.1GW – against an outturn need of 8.5GW.

The former Government belatedly woke up to the confluence of the above factors and sought to manage them through a variety of means, including limited reforms to the NSIP process, placing a 'growth duty' on the energy regulator Ofgem and developing the Strategic Spatial Energy Plan, intended to short-circuit some elements of the Development Consent Order process for energy. However, it did not grasp the extremely prickly nettle of accepting that the entire structure of development control and infrastructure deployment is heavily fragmented and in need of almost wholesale reworking. But this would be a legislative project reaching well beyond the next Parliament and indeed well beyond the 2030 target. How can we suture the State in such a timeline?



Building from where we are now

04

The starting point must be to look at the tools in play and identify how they can be stretched without requiring a radical new regime. For these purposes, the Strategic Spatial Energy Plan (SSEP) currently under development is key.

In its current form, this exercise is intended to set out where and in what volume new generation is required to meet the former Government's 2035 target. This analysis will then be combined with the System Operator's Centralised Strategic Network Plan (CSNP) to identify the network build-out that will be required to support this level of generation.

Although Government has not explicitly stated how it intends to use the SSEP, conversations with insiders have laid out how it is intended to support more rapid delivery of infrastructure.

When evaluating a project for the purposes of offering a Development Consent Order (DCO), planning authorities are obliged to look at the 'need case' for that project set against its impacts on its surrounds. The intent is to enable this quasi-judicial process to properly evaluate whether such a project is, in fact, necessary. The Government directs planning authorities to accept certain categories of development as having a clear need case through its National Planning Policy Framework and individual National Policy Statements; the latter applying to particular technologies.

The need case as laid out in these statutory documents is for such technologies in principle rather than any specific project. And herein lies the problem: developers are obliged to state the need case for their particular project in a specific location. If objectors can demonstrate that the project could be delivered equally well in an alternative location further from their homes, this creates space for many years of litigation. Even if a project is moved to an alternative location, local objectors to this new location can go through the same process.

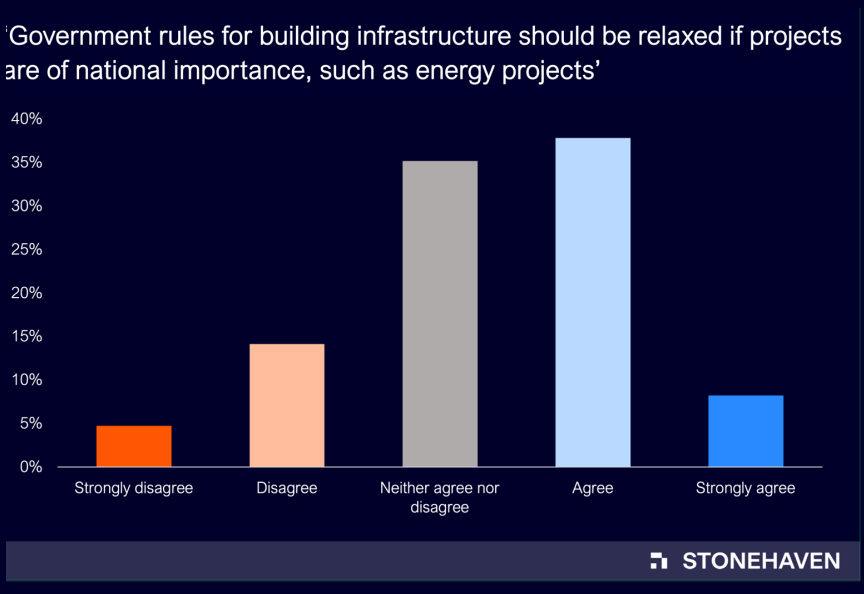
The SSEP is therefore intended to cut through this logjam by stating that specific projects in specific locations have a strong need case and should therefore be passed through the DCO process. While this will certainly help – especially given that the present Government has a target 5 years later than 2030 – it is not enough of a boost to the timeline under consideration.

The first step in achieving the 2030 target is therefore to supercharge the SSEP by giving its contents statutory force over and above their contribution to the DCO process. In the strongest version of this proposal, this means that the inclusion of a project within a published SSEP should give it the status of achieving development consent. This should be applicable to projects already going through a consenting process as well as entirely novel projects.

While this is a radical step, Stonehaven's voter research (Figure 4) indicates that the public would be content to see this change if it is explicitly connected to the Government's priorities.

Nonetheless, this would involve designating projects for construction across much of the UK's landmass and waters without recourse to public input or, in a stronger version of this proposal, judicial review on anything other than administrative grounds. It also runs the risk of inadvertently consenting projects that have implications for other areas of Government interest, such as defence. We outline in the next chapter a process for combing the SSEP and CSNP into a single National Energy Plan that gives scope for due consideration of relevant issues and allows some room for input, set against the need to deliver at pace.

Figure 4



The Politics of the National Energy Plan

05



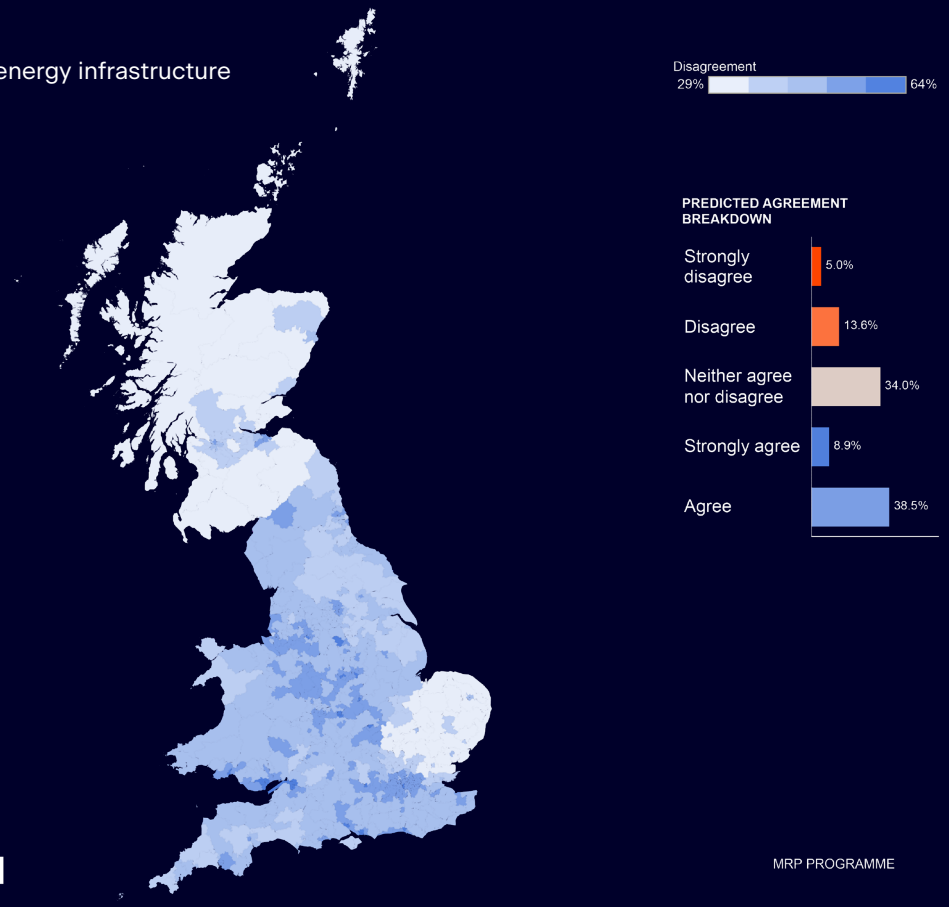
The purpose of the National Energy plan is to provide a single point of decision-making for all infrastructure included within it, thus eliminating the delays caused by the consenting process. The existing SSEP and CSNP already incorporate a broad range of data:

- Existing spatial protections, such as Sites of Special Scientific Interest and Marine Conservation Zones;
- Heritage sites, with assumptions around impact on views;
- High grade agricultural land;
- Marine areas designated for offshore wind by the Crown Estate, and;
- Areas that may potentially impact on defence interests, such as radar, where no mitigation exists.

The Geospatial Commission, the part of the Civil Service responsible for cross-Government spatial data sharing and integration, should be tasked with identifying any other spatial data that could be reasonably incorporated into the NEP that may impact on planning. This may include early forms of DEFRA's land use framework and its work on marine spatial prioritisation, as well as similar efforts being undertaken by the Crown Estate. Crucially, the NEP must include the best possible spatial data on ecosystem diversity and resilience.

However, it is not enough to internalise purely regulatory and scientific data. An understanding of the values of the public in communities that might host this infrastructure is also essential. Figure 5 shows popular enthusiasm for new energy infrastructure in the UK.

Figure 5: Public appetite for new energy infrastructure



What is clear, even from a cursory reading of the above, is that communities that have recently hosted a significant amount of infrastructure are less enthusiastic about it. The Beauly Denny line[8] in Scotland as well as a large-scale onshore wind built-out, new connections in East Anglia and HVDC substations to support offshore wind – all of these have ensured that while an overwhelming majority of the public in these locales supports new infrastructure, their appetite for it is less than elsewhere in the country.

This creates a risk to delivery. While the recommendations below serve to eliminate some of the regulatory risk that public pushback would normally imply, they do not minimise the political risk that infrastructure build-out carries. And so, when developing the NEP, it is essential to think of it as planning a political campaign as well as planning a power system.

This means developing a detailed map of the underlying values of the public with respect to infrastructure, to understand what drives opposition – or support – in a given area. The public may see new infrastructure as a threat to their security, finances or health, as an imposition into areas they see as theirs, or as something that damages their sense of place. Conversely, they may also see it as evidence that the UK is capable of building again, and that progress is possible.

The NEP must therefore take this psychogeography into account when identifying which projects to take forward. The cost of a project is not simply the cost of delivering it, but the cost of proportionately reducing the political risk it faces. Interventions to do so must be tailored to ensure that a majority in each area will support the project on an enduring basis. This is much like how a political campaign tailors a manifesto to win the support of a sufficiently large coalition of the electorate. This means that some communities will want the security that comes from additional financial payments on the Winser model,[9] others will want to ensure that projects come with opportunities for local people, while others will want some form of co-ownership of assets – or a mix of all of these.

For the rest of the country, which can also offer political support, we recommend a campaign focused on setting out what the plan is and how it will change the country. This should be intended to build a coalition of genuine grassroots supporters who can see the benefits to the UK that the plan offers.

The final NEP, taking all of the above into account, should constitute a spatial plan that specifies the location, technology and performance characteristics of all new energy assets – generation, storage and transmission - required to deliver the 2030 target. This should be specified in the form of a set of projects – and associated political risk interventions - for the purposes of implementation.

Legislation and consultation

06



Given the timeframe available for the delivery of the 2030 target, the final NEP should be published by the end of June 2025.

This means that the Government will be obliged to instruct the National Energy System Operator (NESO) to deliver a draft plan before the end of 2024 to enable a reasonable amount of time for consultation.

While the NESO develops the plan, the Government will need to pass legislation to give effect to it. This will take the form of amendments to the Planning Act 2008 that include projects specified in the NEP as being Nationally Significant Infrastructure Projects regardless of their scale, specifying that projects in the NEP are to be issued with a Development Consent Order without regard to the need to apply for such an order, and any minor amendments to the content of such orders as may be required to facilitate delivery. This should explicitly incorporate obviating the need for environmental impact assessments for each project, as such data should be taken account of in the NEP. This could also be applied retroactively to existing projects where appropriate. Amendments to other legislation will be required to deliver the projects themselves, as detailed in sections below.

Following the initial publication of the plan, a short – no more than two months – period of consultation should follow, in which respondents will be invited to highlight any issues within the scope of the NEP they have reason to believe it has not taken into account. This consultation will be vital for NGOs and communities across the UK to input their views on our future energy system. The NESO shall be responsible for evaluating these inputs and producing a final version of the NEP to be signed off by the Secretary of State and published.

Once published, the NEP cannot be subject to appeal and represents the final decision on how the 2030 target should be delivered. What will be important, however, is the incorporation of allowable tolerances within the Development Consent Orders issued to each of the projects identified by the NEP to enable minor changes of design and/or routing, especially in the case of new grid connections.

Implementing the projects

07



The NEP will produce a set of projects of varying technology types in specific locations. Actually delivering these projects must be left to the private sector, inasmuch as the period for delivery of the target precludes the establishment of a public sector delivery body capable of delivering infrastructure on such a transformative scale.

This means establishing a route through which private sector involvement can be enabled. There are already existing instruments through which the Government can incentivise investment in all of the assets likely to be required, including Contracts for Difference (CFDs), Dispatchable Power Agreements (DPAs), and the Capacity Market (CM). However, the mechanisms for allocating these instruments are not specific to a particular location or a particular capacity, while the projects identified by the NEP will be both of these.

This means that delivery will not require novel subsidies, but rather novel routes for offering existing schemes. In this, we can have regard to the Danish model[10] for offshore wind delivery, which auctions off a licence to a specific site that is pre-cleared for development as well as a grid connection to that site. Given that the NEP will include grid connections sized to the volume of projects to be delivered as well as including a Development Consent Order for each project, this offers a helpful model.

Implementing this over the course of 2025 will require publishing eligibility criteria for potential bidders in Q1 of that year, approving bidders towards the end of Q2 as the NEP is published, and opening auctions for every project in Q3 or 4 with a view to awarding winners by the end of the year at the latest.

Winners of, for example, an offshore wind project auction will receive the right to develop a project of the specified scale on that site, a connection to the grid by a specified date and a CFD at the strike price of their winning bid. Given the role of the Crown Estate in licensing seabed areas for the purposes of offshore wind and carbon transport, such licences will also need to be issued to winning parties simultaneously. The Secretary of State has powers under the Crown Estate 1961 to issue directions to the Crown Estate for this purpose, but those directions are subject to a general duty on the Crown Estate Commissioners to maximise the economic value of their property. This creates a risk that the Crown Estate will be obliged to maximise rents across these projects. Any legislation passed to deliver the NEP may wish to revisit this duty. However, delivery of alternative allocation routes for existing instruments can in most cases be managed through secondary legislation.

Managing Supply Chains

Set out above is, essentially, the single largest peacetime procurement exercise ever undertaken by the British Government. This will take place at the same time as many countries around the world are looking to secure similar energy assets for their own purposes. Various infrastructure companies have already highlighted the extent to which supply chains are stretched, and this represents a material risk to the delivery of 2030.

There is a potential role for Government in leveraging its scale to procure the components and assets needed for delivery of the 2030 projects more cost effectively and at lower risk than individual procurement actions by all bidders. Given the NEP will specify project scale and technology, the components and materials necessary for delivery of the majority of projects can be known in advance. The Government's proposed Great British Energy (GBE) could therefore take on a role analogous to the Dutch and German network operator TenneT[11] in procuring components for multiple projects in a single tender action.

Such components could therefore be offered to winning bidders of project auctions to help manage costs down on a cost-pass-through basis. GBE has the option of procuring such components exclusively from British companies for the purposes of building onshore supply chains, although such an option may come at a premium as opposed to procuring on the open market.

This approach has much to recommend it – not least that in theory an efficient procurement exercise should essentially be cost neutral – but carries the risk that a badly run exercise could leave GBE with a large volume of unsellable components it will need to dispose of at a loss. This risk is heightened by the timescales involved; for the purposes of delivery, forward contracts for components would need to be agreed by the end of 2026. However, this risk will need to be traded off against the risk that insufficient production capacity for e.g. cables is built in time to service these projects if it is not contracted for early enough.

It may be preferable for Government to simply underwrite contracts for companies that have successfully won a project, although this will have a less direct impact on procurement risk. It also misses one of the key benefits of the above approach: GBE is free to buy from companies in which the Government's planned National Wealth Fund has invested, meaning that the Government is able to improve returns for public capital. This could also be bound into a more spatially targeted jobs and skills strategy. We will provide more detail on this in a forthcoming paper.

Paying for it

The existing instruments outlined above typically have their costs recovered from energy bills. To avoid imposing what could be a significant additional cost on the public, we would recommend transferring purely the incremental costs of the 2030 target onto general taxation rather than bills.

We have not sought to establish a cost for this measure, but the majority of the cost of 2030 would be incurred after that date and is therefore not subject to current spending pledges. Even without this move, analysis undertaken by Aurora[12] indicates that a 2030 power decarbonisation target would result in lower consumer costs than the previous Government's 2035 trajectory.



An enduring role for the national energy plan

08

While delivery of the 2030 target using the mechanisms laid out above would be a colossal nation-wide undertaking that would consume considerable energy across Government, almost analogous to a war or the resources poured into the Apollo programme, the capabilities it would generate would be transformative. As set out above, the UK has a structural problem in its delivery of infrastructure, and moving to a single point of decision-making for major projects would have a transformative impact not simply on energy but on infrastructure more broadly.

For example, there is not yet a meaningful plan to deliver the volumes of nuclear generation required for a range of decarbonisation scenarios envisaged by the Climate Change Committee. New nuclear will require specific sites and significantly less additional transmission capacity than the equivalent volume of renewable energy, which may reduce overall system costs. There are a number of existing licenced nuclear sites, but future uses of nuclear power may go beyond these. This could include providing zero carbon industrial heat, as well as smaller reactors capable of being mass produced. Given the complexity of nuclear regulation, creating a single decision-making process across nuclear energy could greatly speed up decision-making.

By proving the case for a radical decisive State through the delivery of the 2030 target, an enduring role for this kind of action would be legitimised. This would create the scope for the broader economic transformation of the UK as well as its energy supplies, offering a faster route for the delivery of new rail connections, new water infrastructure and housing. The long-term impact of this change on economic growth could be considerable. A coalition for more rapid action on climate change can only be built on an expanding economy.

In the short term, however, the proposals outlined in this paper are likely to prove controversial. They are indeed an almost revolutionary break with the status quo. However, by unlocking the ability of Government to deliver both decarbonisation and investment quickly – the heart of their manifesto – they set the stage for a decade of national renewal. This rests on the decision to heal the fragmented state.

The long-term impact of this change all rests on the decision to heal a fragmented state.

About Project Tempo and Stonehaven

Project Tempo is an independent not for profit. The organisation is non-partisan and is focused on finding ways to square growth, productivity and decarbonisation within a nation's political and economic realities. We understand there are no one-size-fits-all solutions. Our focus is on tailored ideas that align with national priorities and work for people. Our ethos is to dispassionately pursue what works. By embracing the nuances of the political economy, we deliver pro-growth, pro-worker, pro-climate solutions benefiting all of society

Stonehaven is an international firm that is home to some of the best in strategic consultancy, data and insight, policy, advocacy, sustainability, public affairs, digital and creative communications specialists in the business.

It's this diversity of thought expertise that enables us to find unique, fresh solutions to some of the world's most complex business and brand problems.

[1] Summary for Policymakers — Global Warming of 1.5 ºC (ipcc.ch)

[2] Ed Miliband: Labour 'will achieve zero carbon power by 2030' | Politics News | Sky News

[3] Labour conference: Starmer ambition to get off fossil fuels by 2030 - BBC News

[4] Source: Data for onshore wind, offshore wind and solar PV from Britain Remade PowerBook, data for Gas CCS Retrofit from BEIS Electricity Generation Costs (2020), data for LDES from DESNZ (2023), archetype 3. Note that this latter category does not include pumped hydro storage.

[5] Offshore Electricity Transmission. See Offshore Electricity Transmission (OFTO) | Ofgem.

[6] Pipeline of UK energy storage projects grows by two-thirds over last 12 months - RenewableUK

[7] Nationally Significant Infrastructure: action plan for reforms to the planning process - GOV.UK (www.gov.uk)

[8] Beauly-Denny power line dividing opinion 15 years on from public inquiry (pressandjournal.co.uk)

[9] Accelerating electricity transmission network deployment: Electricity Networks Commissioner's recommendations - GOV.UK (www.gov.uk)

[10] See e.g. pdf_denmark.pdf (aures2project.eu) for an overview.

[11] Around €30 billion: Europe's largest-ever contracting pack-age for security of supply, the energy transition and climate protection launched (tennet.eu)

[12] Aurora Energy Research on X: " On our current pathway, we expect total consumer costs to be £112/MWh (average annual costs, 2025-50). In a 2035 net zero scenario, costs would be 2% lower (£109/MWh). In a 2030 net zero scenario, the costs would be 4% lower (£107/MWh). (6/)" / X