



MARKET INSIGHT NOVEMBER 2020

Dear Colleague,

The past couple of weeks have felt like a significant moment in addressing the climate emergency and the path to net zero. With the Prime Minister's [10 Point Plan](#) we are beginning to see what it would look like if the machinery of government was fully geared up for the challenge. The National Infrastructure Strategy and the announcements on the next CfD auction round set out a vision of a smart, flexible energy system with 65% of our power coming from renewables by 2035.

We should welcome weeks like this when we get them. We should also recognise how much more there is to do.

We are now expecting the [all-important policy documents](#) setting out the details of how we will deliver on the government's ambitions, including an Energy White Paper, the Transport Decarbonisation Plan and the critical Heat and Buildings Strategy. It will be vital that the high level ambition set out by the government is not watered down by Treasury caution or vested interest lobbying. There was a warning in the strange case of the disappearing Future Homes Standard where the commitment for this to come into force in 2023 was airbrushed out of the 10 Point Plan after its publication.

With critical decisions on investment in our energy infrastructure due shortly, speakers at Regen's [Green Recovery Leaders' Debate](#) last week also focused on the need to align and speed up decision making by government, the regulator, Ofgem, and the System Operator. The government has announced reviews of system governance. Regen is pressing for this to put net zero at the heart of Ofgem's remit and to ensure the Electricity System Operator is able to invest in the changes required in the system. We will only enable investment to flow at the speed required if all parts of our energy system are aligned behind the net zero goal.

Merlin Hyman
Chief executive
Regen



Government policy bonanza

There's been a flurry of government activity in the last week or so. Our policy and advocacy manager, Madeleine, dives into the government's recent policy announcements and what they mean for the energy industry

[Find out more](#)



Regen responds to the ten-point plan

The government's announcement of a "10 point plan" offers a very welcome, and much needed, clear direction to set us on the transition to net zero and provide stimulus, jobs and optimism following the Coronavirus pandemic. Madeleine Greenhalgh highlights the key policy asks to deliver the goals.

[Find out more](#)



Community energy's "ten point plan"

Last week we hosted a community energy forum exploring heat and energy efficiency with Northern Powergrid. Ky Hoare, our local energy coordinator, shares learnings on one of the biggest challenges in achieving net zero.

[Find out more](#)



Podcast: The ten-point plan for a green industrial revolution

The second in Regen's transforming energy podcast. In this episode, we explore the Ten Point Plan for a Green Industrial Revolution with Madeleine Greenhalgh and Merlin Hyman.

Listen to the podcast ([Apple Podcasts](#) and [on our website](#))



Decarbonisation and Ofgem - time for a change of remit

Regen have been following Ofgem's work on network charging for the last three years and the Access SCR is now tantalisingly close to a minded-to decision. Poppy Maltby looks at how the emerging themes of the Access SCR may impact decarbonisation.

[Find out more](#)



System operation in a net zero world: what might the energy white paper mean for National Grid

Our policy and advocacy manager, Madeleine Greenhalgh, collects some thoughts on the future role of the electricity system operator, ahead of possible major announcements.

[Find out more](#)



Back Onshore

This week brought confirmation that onshore wind and solar will be able to participate in the next round of Contracts for Difference (CfD) auctions, providing the potential for new projects to secure a stable, long-term price for power whilst ensuring best value for the consumer. Thrive Renewables explores

[Find out more](#)



Using planning policy to drive net zero

With the government's latest policy offerings underscoring the need to decarbonise our homes and deploy new renewable generation, the planning system has never been more important to achieving our net zero ambitions. Hazel Williams, our head of delivery, highlights the latest developments in local and national planning policy.

[Find out more](#)

Graphic of the Month

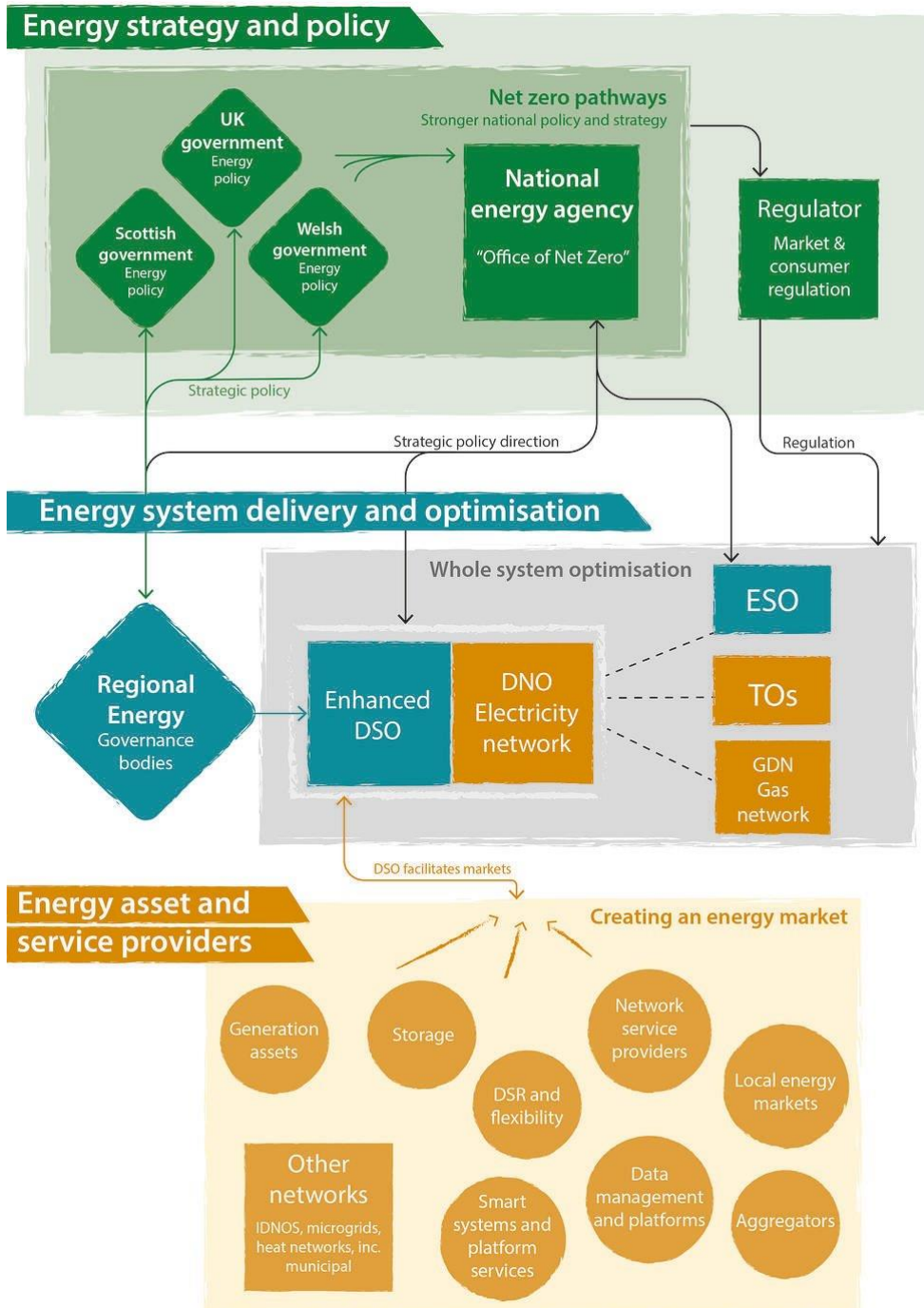
There have been rumours that the Energy White Paper will lead to further structural change for the Electricity System Operator and a formal review has now been confirmed

by government in the National Infrastructure Strategy. In late 2019, Regen wrote a paper, [Energy Networks for the Future](#), discussing the possibilities around what large-scale structural change might mean for system and network operation.

In this paper, we sketched out a new model for network governance. Written amid the nationalisation debates ahead of the 2019 election, we came to the conclusion that broad structural change of the networks was needed, regardless of the ownership model.

A structure like the one sketched out here would give a stronger remit and clearer direction across the system, allowing decisions on planning, investment and social issues to be made jointly, with network operators working closely with each other, with policy makers, and with local authorities to achieve a clear goal.

Read more about our views on upcoming structural changes to the ESO [in our latest blog](#).



[Click here to view the full size graphic.](#)

Events

Green Recovery Webinar Series

Unlocking investment to build back greener - 1 December

The government's commitment to 'Build Back Greener' will require billions of pounds of investment flows to be redirected from high carbon sectors to sustainable and resilient assets, such as renewable power generation, decarbonising our homes and buildings and electric vehicle charging.

[Book online](#)

If you missed any, the previous Green Recovery sessions can be replayed [online here](#).

Electricity Storage Network Symposium

Online 26 - 17 Jan

Further information available soon, hold the date



Finally, we are proud to be a membership organisation and I invite those of you who aren't yet members to join us:

- Regen membership – [find out more or join here](#).
- The Electricity Storage Network membership – [find out more and join here](#).
- Bespoke local authority membership – contact hwilliams@regen.co.uk

If you are a member and have any job openings that you would like to advertise with us, please contact Hannah hstanley@regen.co.uk

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