

ACTIVITY UPDATE

2018

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Introduction

2018 has been quite the year, and a lot could happen before December 31st! BEAMA has led engagement with key industry participants and, as the UK's new relationship with Europe and the rest of the world unfolds, energy systems in the UK and the safety of electrical equipment post Grenfell also undergo considerable change.

Many of our members have contributed to our BREXIT work through EURIS, and this is set to continue into 2019, as the full implications of the BREXIT changes begin to affect members and their markets. The changing carbon and cost basis of electricity is leading our members to consider their best strategy for future prosperity.

BEAMA is taking a leading role in a number of key industry activities: The leadership of the smart EV charging Task Force, Chairmanship of the Each Home Counts implementation board, and high-level involvement with several groups looking at the future of energy. All of these will help inform our member companies future plans and activities.

The increasing focus on electrical product safety and compliance stems primarily from the after effects of the Grenfell fire. The imminent introduction of 5 yearly inspections for private rented dwellings is likely to be accompanied by increased product compliance, a move to be welcomed by our industry, but with some potential new requirements for our members.

Internally the BEAMA team is also going through significant change: our long standing respected Technical Director Anne Humberstone and Keith Smith, electrical industry stalwart, both retired in June. Kelly Butler, Deputy CEO and Marketing Director moved on into industry, and is now a BEAMA member. As a result, and considering the future retirements of Terry Rowbury and Les Woolner in 2019, BEAMA has put in place a new management structure, with two new employees. I am confident that this new team will take forward our services to members into the future and continue to deliver on behalf of our membership!



Dr Howard Porter



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The Heating & Ventilation Portfolio

The Heating and Ventilation Portfolio within BEAMA represents manufacturers and suppliers of equipment for environmental systems within buildings; that deliver comfort, efficiency and safety for occupants.

The groups that currently make up this Portfolio are Domestic Heat Pumps, Electric Heating & Hot Water, Heating Controls, Underfloor Heating, Ventilation, Water Safety & Hygiene, Water Softeners, and Water Treatment.

The strategic direction and activities of each group are determined by its Management Committee, comprised of, and chaired by, member companies who also sit on relevant technical committees and specific task groups. Activities may be Government, industry or consumer facing but are always focused on growing the market while supporting good practice and effective guidance.

The groups continue to be active in influencing Government policy with a specific focus on Building Regulations, building energy performance calculation methodologies, the Renewable Heat Incentive, *Each Home Counts*, and ongoing standardisation. They have also been prominent in driving Government action on effective regulation for hot water safety, installation of heating controls, and measures to improve indoor air quality, as well as establishing numerous training and installation standards.



Strong links and membership of related European associations has also allowed the H & V portfolio members to have a strong voice in the development of EU policy including Ecodesign, Energy Labelling, the Energy Performance of Buildings Directive, and the Energy Efficiency Directive. This ensures that the interests of UK industry are fully accounted for in the development of these Directives.



Positive outcomes achieved from the portfolio over the past year:

- Produced a set of functional definitions for heating controls for the purposes of mapping technologies to policy definitions and increasing the robustness of research on control performance
- Published a White Paper "*Better Ventilation, Better Homes, Better Health*" setting out the agenda for improved indoor air quality to policymakers and stakeholders
- Produced a consumer facing video showing how deteriorating indoor air quality can lead to a range of serious health problems
- Ongoing progress towards an underfloor expert installer registration, training and certification scheme. This is expected to launch in 2019 and will bring a recognition to trained and expert installers and give homeowners confidence to employ recognised tradesmen
- Launched the BEAMA underfloor group website and LinkedIn account as the central portals for installers and homeowners to find the latest information about underfloor heating, resources and guides, installation examples and training. We are due to launch the BEAMA Electric Heating & Hot Water website, this has been developed to allow installers and consumers access to the latest advice and updates on changes to legislation, regulation and practice
- Due to publish the universal test kit that will enable installers to test the quality of the heating system water and determine if re-dosing of inhibitors is required
- Launched the BEAMA water softeners website which offers advice and guidance for installers and homeowners. A campaign focusing on the many myths that exist around water softening will be launched in 2019
- Developed an industry guidance on Risk Assessments for the Health Sector supplementary guidance to document HBN00-10PartC 'Sanitary Assemblies'

The Building Electrical Systems Portfolio

The BES (Building Electrical Systems) portfolio consists of BEAMA members who are leading manufacturers of products associated with electrical distribution for the residential, commercial and industrial building segments.

The product areas that are currently covered by this Portfolio are: Cable Management Systems, House Service Cut-outs, Circuit Protection Devices, Enclosure Systems, including domestic consumer units, distribution boards and panel boards, LV Distribution Switchboards, Feeder Pillars, Busbar Trunking and Switch and Fuse-gear.

The portfolio is focused on supporting the development and maintenance of product standards at UK, EU and International level via our active and experienced technical committees. BEAMA is also represented at JPEL/64, Electrical Installations of Buildings, which is the joint IET/BSI technical committee responsible for the maintenance and development of the UK wiring regulations. The groups provide regular responses to government requests for support and consultations on subjects such as improving electrical safety.

Member companies are also working together across industry to support the Implementation of digitalisation projects in the UK such as Building information modeling (BIM).



BEAMA members are updated regularly on new UK and EU policy information in order to help them to identify the changes that they need to make within their businesses to comply with new legislation. A current example of this is the forthcoming changes to the Waste Electrical and Electronic Equipment directive (WEEE).



Positive outcomes achieved from the portfolio over the past year:

- Three Product Guides and technical bulletins published to coincide with the launch of the 18th edition Wiring Regulations in July
- Published an 'Electrical Safety in Dwellings' White Paper recommending a 5 yearly mandatory inspection and implementing a subsequent campaign to promote this within government
- Widespread engagement in the full scope of BIM development activities at both UK and EU level
- Increased compliance activities including product testing projects covering consumer units, RCBOs, Socket outlets, fused connection units, etc
- Identified 14,000 non-compliant wiring accessories installed on a major UK off-site construction project resulting in them being removed and replaced by compliant, BEAMA member, products
- Expertise and support for the development of the new EDA training modules
- Completion of the first Product Safety Checklist covering circuit protection products



The Networks Portfolio

The Networks portfolio covers BEAMA manufacturers and providers of products for the Transmission & Distribution sector, including transformers, switchgear and network protection as well as storage, smart grids and cybersecurity. Networks also covers related products and technology used in the commercial, industrial and oil and gas sectors.

The Networks Portfolio provides both proactive and reactive activities as agreed with members in the annual work programme. This includes technical services, publication of Industry White Papers, representation with other stakeholders and full engagement with all relevant BSI Standardisation Committees.

Networks is well connected with BEIS, Ofgem, ENA, National Grid and Distribution Network Operators. Recently it has been working with the ENA to update the Protection Assessment process and is now representing our members on the development of RII02.

The BEAMA Energy Systems Strategy Forum (ESSF) is included within the networks membership and has been established to provide thought leadership for other BEAMA groups on the role of technology in the transformation of the GB energy systems.



Over the last year the ESSF has:

- Led on the delivery function of BEAMA's *Electrification by Design* Series
- Formalised Collaborative Partnership with Energy Systems Catapult (ESC) and hosted several collaborative forums and workshops with the ESC and workshops in partnership with the ESC covering Smart Systems, Heat and Energy System Transition
- Supported BEAMA input to the Reshaping Regulation Project
- Established close links to a wide range of important stakeholders, including the ENA OpenNetworks project, *NG Power Responsive*, EV Energy Task Force and BSI L/13 Smart Energy coordination group



Positive outcomes achieved from the portfolio over the past year:

- BEAMA Networks is an active member of T&D Europe and over the last year was closely involved in the review of the EcoDesign for Transformer Regulations and the INTAS market surveillance project
- Established and launched the BEAMA Senior Strategy Committee which will own the BEAMA Networks annual work programme
- Taken the lead on Electric Vehicle Energy Task Force, WP3 Technical Requirements of Smart Charging and providing input to WP 1, 2 & 4
- Provided proactive input to: Open Networks Project Advisory Board; Power Responsive Steering Group; Network Charging; RII02 Innovation; NG System Operator development
- Continued engagement with ENA to bring about modernisation, improvements and feedback on the ENA Assessment Processes
- Published the *Electrification by Design* series with papers covering flexibility, heat, transport, energy storage and smart homes
- Re-focussed and relaunched the BEAMA Energy Systems Group which is now a value-added service to members of the Networks and Flexible Energy Systems portfolios
- Established and launched a Cyber Security and Communications group under the auspices of Networks Automation and Protection Section
- Submitted an issue regarding reactive power network tariffs via the Distribution Charging Methodologies Development Group (DCMDG)

The Flexible Energy Systems Portfolio

The BEAMA Flexible Energy Systems portfolio consists of six product groups committed to developing reliable behind-the-meter solutions to one of the great energy challenges we face.

The portfolio focus has been on how to deliver a flexible energy system that provides the services such as heat and transport that people need at the times they need them, while managing the growing intermittency of supply that comes with the increasing levels of renewable generation.

Over the last year we have established a new Metering Solutions Group to represent the supply chain and services in non-SMETS smart metering and to take account of the growing importance of energy data. We have seen the commencement of SMETS2 installations and given meter manufacturers a strong voice in the final technical and testing hurdles to volume rollout, and continued our support for the IHD mandate by commissioning independent qualitative research into consumer use and experience of real-time energy displays.

To reflect the growing importance of electric vehicles, BEAMA hosted a symposium on EV infrastructure and continues to provide significant strategic and operational direction to both the EV Energy Taskforce and the Mayor of London's EV Infrastructure Taskforce. We contributed to the BEIS/OLEV Smart Appliances and EV Charging Standards Landscaping exercise.



Together with Networks product groups, the Flexible Energy Systems portfolio has led work on BEAMA's *Electrification by Design* and the series of companion publications, including on smart homes, energy storage, and the electrification of transport.

Positive outcomes achieved from the portfolio over the past year:

- Established a new 'Metering Solutions Group' to represent the supply chain and services in relation to non-SMETS smart metering;
- Contributed to BEAMA's *Electrification by Design* and the series of companion publications, including *Smart Homes*, *Energy Storage*, and *Electrification of Transport*;
- Seen the commencement of SMETS2 installations and given meter manufacturers a strong voice in the final technical and testing hurdles to volume rollout;
- Continued our support for the IHD mandate by commissioning independent qualitative research into consumer use and experience of real-time energy displays;
- Hosted a symposium on EV infrastructure and provided significant strategic and operational direction to both the EV Energy Taskforce and the Mayor of London's EV Infrastructure Taskforce
- Contributed to the BEIS/OLEV Smart Appliances and EV Charging Standards Landscaping exercise

Policy

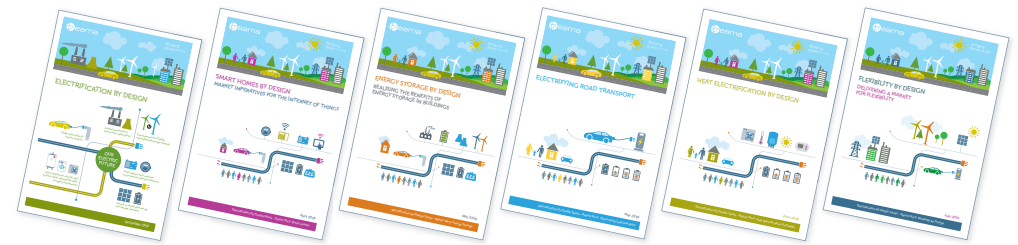
Following a restructure last year, BEAMA's policy work is now overseen by a central team, ensuring cross sector input is gathered for key policy agendas including flexibility, market design, eco design, building regulations and much more.

Close alignment of policy with our central marketing team ensures we can be more effective in communicating our positions and publicising industry views on social media and in the press. As we move forward we are increasingly developing more effective campaigns to represent our members' interests.

Key achievements from the policy team include.

- Responded to over 20 Key UK and EU policy development consultations this year – covering Smart Appliances, Heat, SAP, Energy Efficiency, Clean Air, ECO, electrical safety, off-site construction, Energy Performance Certificates, the EU Cyber Security Act, the EU Clean Energy Package, WEEE Guidance and Eco Design lots under review
- 4 direct letters to ministers addressing priority issues for our members – including the challenges facing industry from U.S steel tariffs
- Successful lobbying initiatives from BEAMA and our EU trade association: the reduced Primary Energy Factor in the EU Energy Efficiency Directive, the inclusion of mandatory requirements for room temperature controls under the Energy Performance of Buildings Directive, the scoping for a proposed EU Energy Smart label for appliances and the upcoming introduction of mandatory electric safety checks in some homes
- BEAMA have been in ongoing consultation with Government departments with regards to regulatory implications of Brexit, and we continue to maintain close oversight of the ongoing activity to develop the statutory instruments in the event of a no-deal as well as reviewing options for post Brexit regulatory alignment
- Increased focus and input into EU and UK cybersecurity work – this includes lobbying on the content of the EU Cybersecurity Act and input into DCMS Secure by Design program
- Initiation of BEAMA campaign on all parts of the Building Regulations. This will run into 2019 and develop targeted engagement with MHCLG on core issues for our sector, including electrical safety and energy efficiency
- We continue to have oversight of key policy agendas for our members including environment and waste legislation, circular economy, the UK Smart Flexibility Plan, cybersecurity, product safety and compliance, transport and trade with strong relationships with government departments

BEAMA Launched the *Electrification by Design* Series



In December 2017 BEAMA published a report, **Electrification by Design**, exploring policy and market mechanisms to promote deployment of low-carbon electric systems.

We identified critical enablers of a flexible and efficient low-carbon energy system. These include consumer engagement with energy use, targeted automation of energy management in buildings, and demand-side energy management. We also identified some of the challenges facing the market for smart products and made some recommendations for how to enable and maintain this market and maximise benefits to the consumer and to the network.

Once the main report was published, BEAMA developed a series of linked reports to provide additional detail on our views in the markets for: Smart home products and IoT opportunities, Electrification of Road Transport, Heat Electrification, Flexibility and Network Charging.

Smart Homes by Design: Market Imperatives for the Internet of Things

This short report provides further detail on BEAMA's view of the market for smart home products and IoT opportunities, the benefits on offer and the associated recommendations that are fundamental to realising greater value from smart home systems.

Energy storage by design: Realising the benefits of Energy Storage in Buildings

This report provides further detail on BEAMA's view of the market for energy storage in buildings and the associated recommendations that are fundamental to realising greater value and to grow markets for storage and associated technologies.

Electrifying Road Transport

This report provides further detail on BEAMA's view of the market for the electrification of road transport.

Heat Electrification by Design

This report provides further detail on BEAMA's view of the market for the electrification of heat provision.

Flexibility by Design

This report provides more context to BEAMA's view of how the market can identify and allocate the value of flexibility fairly, transparently and efficiently to support the decarbonisation of the energy system.



Business Development

In addition to recruiting new members into BEAMA product groups, with some existing members engaging more widely and by bringing in 8 new companies not previously in membership, we have also established three new product groups. These are Building Automation & Control Systems (BACS), Ancillary Products and Solutions (APS) and Metering Solutions. A fourth new group, Tools & Equipment for Electrical Working is being developed.



BACS has been formed to address all aspects of energy in non-residential buildings in relation to products, services and data, including but not limited to: metering and metering data; heating; cooling, ventilation; lighting; e-mobility infrastructure; and renewables including energy storage and microgeneration; but excluding building fabric measures. In this respect the scope of the group will largely mirror the scope of the EED and EPBD.

There has also been an increase in interest in BEAMA membership from companies who do not easily fit within the current Portfolio and Product group structure i.e. they provide products and solutions into the UK market, but their market offerings are not covered by any existing BEAMA activity. The Ancillary Products and Solutions Group has been established as the vehicle by which such companies can join BEAMA. Members of this group will be able to access generic industry information and advice, as well as gain access to a forum for lobbying and political engagement, as part of a larger

voice representing the UK electro-technical manufacturing industry.

The new Metering Solutions group has been created to represent the supply chain and services in relation to non-SMETS smart metering. This group has an expanded remit to cover not only electricity but also smart gas, heat and water metering. A key focus in the coming months will be non-SMETS electricity metering at system level (generation, transmission and distribution), supplies above 100kW, and solutions for residential and small commercial premises where SMETS metering cannot be deployed.

We have also been approached by members of the Federation for British Hand Tool Manufacturers (BHTM) who have identified some important technical work that needs to be done (revisions to IEC 60900) and who would like this activity to be managed by BEAMA. The idea presented to BEAMA is to form a new BEAMA group, working title 'Tools & Equipment for Electrical Working', discussions are at an early stage but progressing.

The Anti-Counterfeit Working Group

- Achieved seizure of over 600,000 dangerous counterfeit electrical products from China, Middle East and Africa
- Coordinated successful members' visit to China including Yiwu Market and Canton Fair
- Delivered a workshop at Middle East Electricity exhibition with the support of Dubai authorities
- Provided training sessions to Customs Officers in UAE

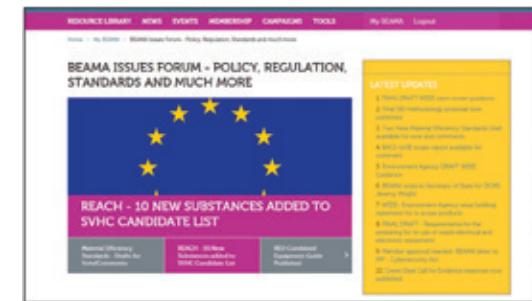


BEAMA Issues Forum

The BEAMA Issues Forum serves as a one stop shop, accessible by all members, for updates on the latest developments across the range of directives, regulations, policies and strategic standards that BEAMA engages with. This includes UK, EU and international issues. The Issues Forum, as a central means of communication, allows members to engage with a wide range of issues including but not limited to Circular Economy, RoHS, REACH, WEEE, Ecodesign, Trade, Electrical Safety, BIM, Building Regulations and SmartCE. As information is retained in chronological order, the Issues Forum serves as a valuable repository for members to consult as and when necessary.

BEAMA members are invited to sign up colleagues from their organisations to access this resource with a login for the BEAMA members area of the website. These may be marketing, sales or product managers who would not normally engage with BEAMA but may benefit from having access to information we provide on key regulations that may affect member businesses.

The BEAMA Issues Forum will allow colleagues to access other market-based information resources as well as regular updates on Brexit.



If you or a colleague would like to gain access to the issues forum please contact:
Charlie May, Marketing Manager
charlie.may@beama.org.uk

If you have any questions regarding the issues forum please contact:
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Brexit

BEAMA initiated the formation of the EURIS Task Force (European Union Relationship and Industrial Strategy), chaired by BEAMA CEO Dr Howard Porter as a means to focus our efforts on engaging with Government on the process of leaving the European Union.

13 trade associations are now members of EURIS representing a total turnover of £148 billion.



TURNOVER
2017
£148
BILLION

EXPORTS
2017
£52
BILLION

EMPLOYMENT
2017
1.1
MILLION



13 trade associations are now members of EURIS representing a total turnover of £148 billion. EURIS is representative of a significant segment of UK imports and exports, EURIS offers us a strong voice with Government on the negotiations process, and provides members with more influence than a single trade body would otherwise have.

Key achievements include:

- *Securing a competitive UK manufacturing sector post Brexit* published, outlining the risks facing industry from a 'no -deal' Brexit reviewed in The Independent and elevated to ministerial level – documenting an extensive survey of UK industry, with strong input from BEAMA members
- 2 EU summits hosted and leading to the formation of an EU network of trade associations to engage in ongoing trade negotiations

- 14 EURIS positions developed and elevated to ministerial level on key issues facing the industry during and post Brexit including; Chequers white paper, rules of origin, IP, continuity on availability of goods, customs proposals, the Irish border, standardisation, notifiable bodies and regulatory alignment
- 8 EURIS Ministerial meetings (DeXEU, BEIS, Treasury, Trade)
- Representation established on sector panels in UK Government informing ongoing negotiations
- Now considering the formation and need for a UK industry office in Brussels post Brexit www.euristaskforce.org





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