AN EVIDENCE-LED CRITIQUE OF THE UK TRANSITION

The wheels are falling off but no one has bothered to look

Heat pumps, electric cars and AI power demand: the gap between the pathway and delivery.

By Shane Oxer - Campaigner for fairer and affordable energy
HOPE to Save Our Countryside | Evidence checked 9 November 2026

Britain is being asked to commit its homes, transport, electricity networks and countryside to a pathway whose delivery assumptions are under growing strain. The sharpest warning is in heating: installations have fallen when the model requires a steep acceleration.

The CCC's 2030 retrofit rate is about 8.7 times its estimate of 2025 delivery. Against the annualised pace from the latest half-year figures, the required increase is about 10.8 times. This is the scale of the catch-up task, with the comparison years stated openly. [2,3]

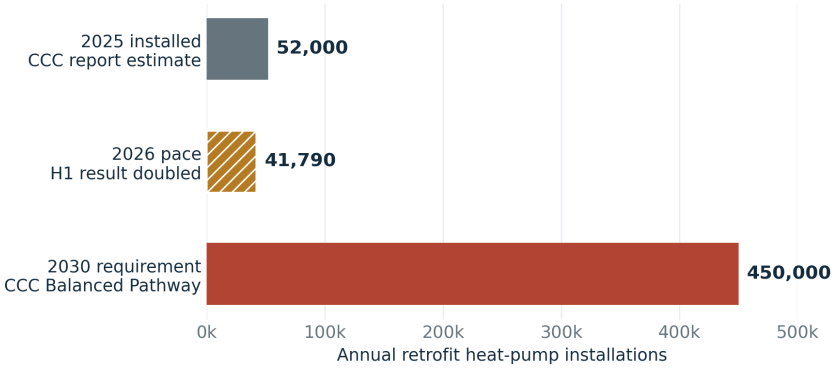
Evidence	What the figures show
Heat-pump delivery	20,895 UK retrofits in January-June 2026: **22% fewer** than a year earlier. [2]
Heat-pump support	Budget 2026 removes **£1 billion** of Warm Homes Plan capital grants. [4]
Vehicles already on the road	Zero-emission vehicles were **5.2%** of the licensed road-using fleet in June 2026. [5]
New electric cars	SMMT expects **32%** in 2027; the CCC pathway assumes **55%**. [7,8]
AI infrastructure	Government identifies a requirement for **6 GW** of AI data-centre capacity by 2030. [9]

The headline is a criticism of political scrutiny and accountability. Official bodies have published warnings. Those warnings demand a public reconciliation of targets, funding, consumer demand, power supply and cost. Repeating the destination is no substitute for showing how Britain will get there.

HEAT PUMPS | THE INSTALLED-TO-PATHWAY GAP

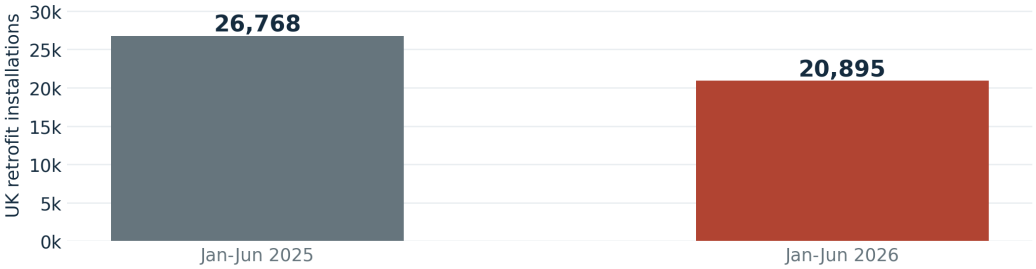
A ninefold gap - and the latest pace is lower

The 2030 rate is 10.8 times the recent annualised pace



The 2026 figure is twice January-June installations, used only as a pace indicator. It is not a full-year forecast. The CCC requirement is for 2030, not 2026. DESNZ June 2026 deployment release; CCC 2026 progress report. [2,3]

Retrofit installations fell 22% in the first half of 2026



An observed comparison of the same six-month period in each year. These are UK MCS-certified domestic retrofits, excluding new builds. DESNZ, Heat pump deployment statistics: June 2026. [2]

Comparison	Calculation	Result
CCC 2030 / CCC estimate for 2025	450,000 / about 52,000	**8.7 times**
CCC 2030 / annualised H1 2026	450,000 / (20,895 x 2)	**10.8 times**
Additional annual volume vs recent pace	450,000 - 41,790	**408,210**
Government 2030 retrofit aim / CCC	250,000 / 450,000	**44.4% below** CCC

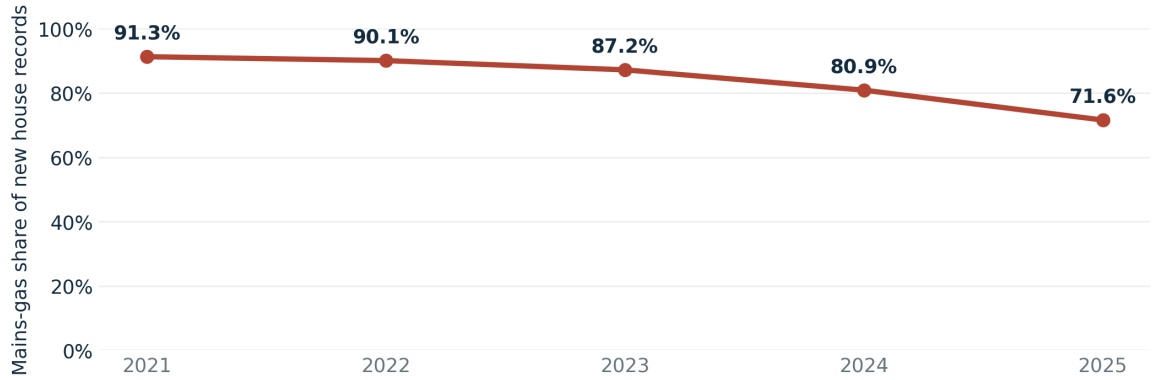
A falling installation rate makes an already demanding acceleration harder. The Budget also reduces Warm Homes Plan capital grants by £1 billion, while retaining the Boiler Upgrade Scheme at £400 million in 2027-28, then broadly increasing it with inflation. [4]

There is a recent positive signal: September 2026 BUS applications reached 9,738, up 138% on September 2025; paid redemptions were 3,332. These later scheme events are not interchangeable with the earlier UK installation series. They warrant monitoring, rather than treating the first half as a full-year forecast. [11]

HOUSING | WHAT THE VERIFIED 85% ACTUALLY MEASURES

Gas is still being added to the housing stock

Gas dominated the five-year record; its share is falling



England, 2021-2025. Detached, semi-detached and terraced house records; excludes flats and bungalows. New-dwelling EPCs also include conversions and changes of use. MHCLG November 2026 workbook, Table4_all_data; author calculation. [1]

Period	House records	Mains gas	Gas share
2021	132,209	120,681	91.3%
2022	140,603	126,636	90.1%
2023	124,646	108,684	87.2%
2024	115,124	93,110	80.9%
2025	116,132	83,133	71.6%
2021-2025	**628,714**	**532,244**	**84.66%**

The weighted calculation is **532,244 / 628,714 = 84.66%**. That reproduces an approximately 85% finding for the five-year record. It is not an assertion that the latest quarterly rate remains 85%. [1]

July-September 2026	House records	Mains gas	Gas share
England	26,342	15,780	59.9%
Yorkshire and the Humber	2,685	1,827	68.0%

England only. Houses comprise detached, semi-detached and terraced records, excluding flats and bungalows. EPC new-dwelling records include conversions and changes of use. They are not a count confined to newly constructed homes. All Part L categories are included. [1]

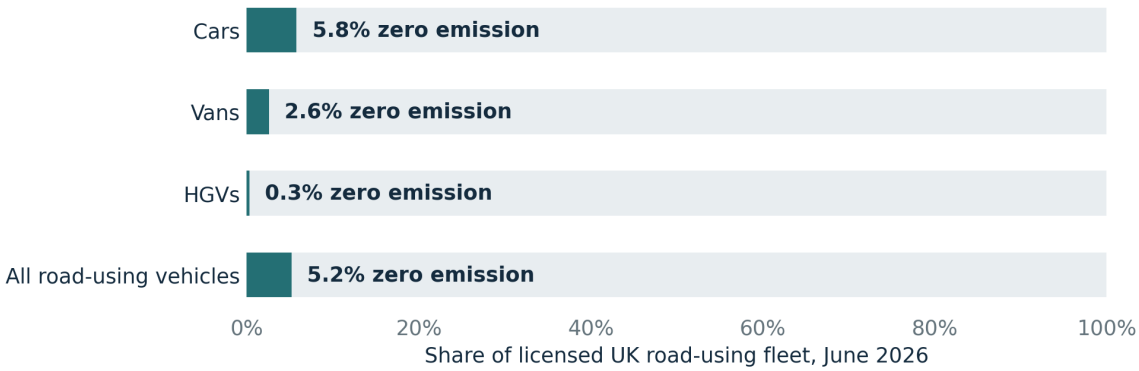
Gas remains the majority main heating fuel in these latest house records, although its share has fallen substantially. The CCC rates new-build heat-pump uptake as on track against its interim indicator. The clearest current deterioration is in retrofits. [3]

EVS | THE FLEET ALREADY USING THE ROADS

About 5% of the fleet - not a quarter

New-registration headlines describe a small annual flow into a much larger existing fleet. The official road-using fleet figure supports the concern that the transition remains at an early stage. [5]

Zero-emission vehicles were 5.2% of the road-using fleet



ZEV is the official category: battery-electric plus a small fuel-cell category. This measures licensed vehicles, not miles travelled. DfT, Vehicle licensing statistics: April-June 2026, Table 3 / VEH1103a. [5]

June 2026 stock	Licensed vehicles	Zero emission	Share
Cars	34,888,140	2,017,093	5.8%
Vans	4,951,370	127,609	2.6%
HGVs	521,099	1,636	0.3%
All road-using vehicles	**42,063,529**	**2,169,589**	**5.2%**

Fleet replacement, not just showroom share, determines how quickly the transport system changes. In the same quarter, zero-emission cars were 27.3% of new registrations but only 5.8% of licensed cars. A rising sales share takes years to work through the stock. [5]

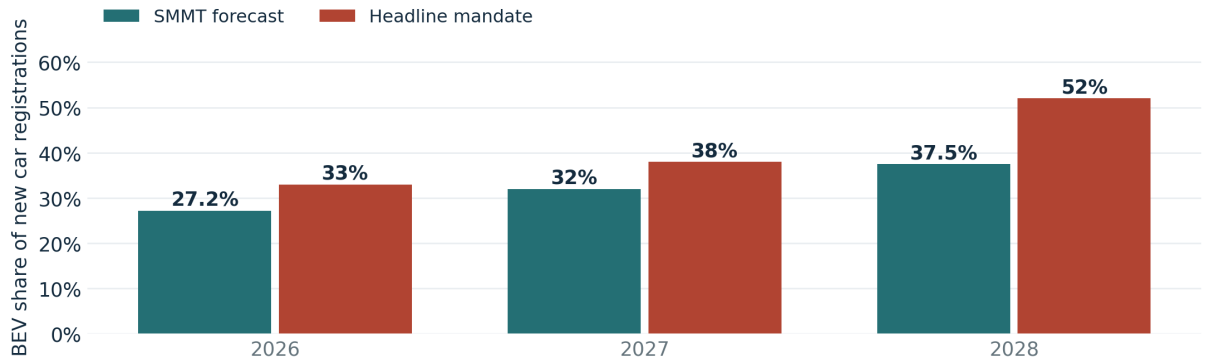
What about miles driven? The verified RAC Foundation estimate was 5.3% of UK car mileage at the end of 2024, compared with a 3.8% fleet share then. That is a historical mileage estimate, not a current 2026 reading. Electric cars can account for a larger share of mileage than their share of vehicle numbers. [12]

ZEV means battery-electric and fuel-cell vehicles. Plug-in hybrids are outside this category even when covering some miles electrically. This report does not relabel fleet share as mileage share.

EVS | FORECASTS, MANDATES AND COMPANY DEPENDENCE

The market outlook is below the pathway

Industry forecasts fall increasingly short of headline targets

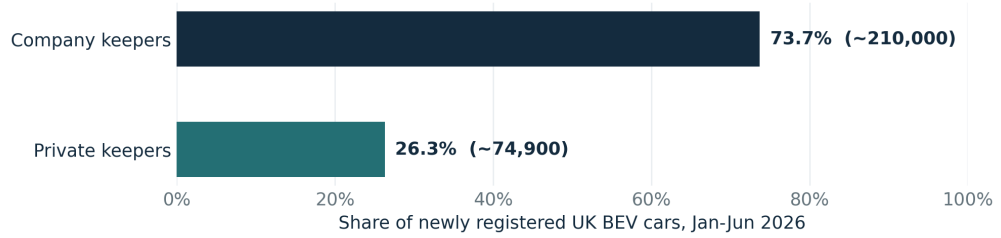


SMMT forecast dated 5 November 2026. A headline market-share gap does not itself demonstrate non-compliance: regulatory flexibilities also apply. SMMT November 2026 market outlook. [7]

New car BEV share	2026	2027	2028
SMMT forecast	27.2%	32.0%	37.5%
Headline mandate	33.0%	38.0%	52.0%
Forecast gap	5.8 points	6.0 points	14.5 points

For 2027 the CCC models **55%** new electric car sales, against SMMT's **32%** forecast: a **23-percentage-point divergence**. The CCC assumes falling purchase costs accelerate adoption. Industry now seeks lower mandates. Government plans a review response by year-end, with possible changes from 2027. [4,7,8]

Company keepers account for nearly three quarters



Keepership is not the same as ownership or purchase method. These data do not provide a clean Motability-excluded private-purchase count. DfT VEH1153a, UK cars, Q1 and Q2 2026; author calculation. [6]

Company keepers represented **73.7%** of newly registered BEV cars in the first half of 2026; private keepers represented **26.3%**. This supports company-channel dominance, while keepership alone cannot identify outright household purchases or remove Motability reliably. [6]

BEV registrations nevertheless grew 30.4% in January-October 2026 and reached 26.6% of new registrations. A forecast market-share gap is not itself a legal compliance failure: manufacturers can use permitted flexibilities. [7]

AI | A MAJOR POWER REQUIREMENT WITH A DIFFERENT LOAD PROFILE

The 6 GW requirement needs a delivery plan

The Data Centre Covenant identifies a UK requirement for **6 GW of AI data-centre capacity by 2030**. It proposes prioritising connections, reallocating capacity and a tightly controlled framework for temporary on-site generation at exceptionally strategic projects. [9]

Government measure	What must be demonstrated
Reserve or reallocate connections	Which sites receive priority, what capacity exists locally and how other users are affected.
Accelerate strategic projects	Physical energisation dates, substations, equipment, consents and funded construction.
Temporary on-site generation	Fuel, operating limits, emissions, dependable output and the conditions for moving to grid supply.
Protect billpayers	Who pays for new networks, reserve capacity and the risks of underused infrastructure.
Water and environmental conditions	Locally deliverable supplies and cooling arrangements, including during dry periods.

Six gigawatts is capacity, not an annual electricity forecast. A continuous 6 GW draw would equal **52.56 TWh a year** by simple arithmetic; actual use depends on utilisation, ramp-up and what the capacity definition includes. It must not be treated as 6 GW of additional generation already required or built.

NESO already models data-centre growth. Its 2026 outlook note warns that government policies to attract investment could make this demand grow faster than assumed. The practical requirement is to update and test the demand profile, locations and dependable supply together. [10]

Annual renewable output alone cannot demonstrate that a particular data-centre connection can be served through a low-wind winter evening. The necessary test includes available generation, network transfer limits, storage duration, demand flexibility and secure backup.

ACCOUNTABILITY | WHAT MINISTERS MUST NOW SHOW

A target is not a delivery programme

The evidence points to a delivery programme under serious strain: retrofit installations have fallen, the market outlook for new electric cars diverges from the CCC pathway, the road fleet changes slowly, and AI brings another large and concentrated power requirement.

Slower electrification can reduce near-term electricity demand, but it also leaves more fossil-fuel use and fewer assumed emissions savings. AI demand has a different location and operating profile. These changes cannot be cancelled against each other with a single national headline.

Required evidence	The question it must answer
Revised annual delivery schedule	What installation and fleet-replacement rates are now achievable, year by year?
Funding matched to that schedule	Which grants, loans and private spending deliver the numbers after the Budget changes?
Power available where demand occurs	Which generation, connections and network upgrades physically arrive by each deadline?
A demanding reliability assessment	How does the system cope with winter peaks, low wind, outages and limited imports?
A transparent cost comparison	What are the full public and private costs, bill effects and alternatives, including nuclear, flexible gas and different renewable mixes?
Updated emissions accounting	Which carbon-budget assumptions change when heat pumps, EVs or electricity supply arrive later?

Ministers should publish that reconciliation before asking households and communities to accept further costs and commitments on the strength of an unchanged promise. This is a demand for evidence, affordable energy and accountable decisions.

MAKE THEM SHOW THE EVIDENCE.

Support the parliamentary petition: **Suspend Climate Change Act targets & undertake a full national impact assessment.** It asks Parliament to consider an independent assessment of costs and impacts before deciding whether targets should continue unchanged. [13]

Sign and share: petition.parliament.uk/petitions/780321

SOURCES | DEFINITIONS AND REPRODUCIBLE CALCULATIONS

Evidence behind the critique

Sources were checked on 9 November 2026. Bracketed numbers refer to the linked publications below. Tables and graphs distinguish observed data, mechanical annualisation, industry forecasts and modelled future requirements.

[1] MHCLG - Energy efficiency characteristics of new dwellings
Released 4 November 2026. Workbook Table4_all_data, Table1_new_dwellings, Definitions and Notes. England; records to September 2026.

[2] DESNZ - Heat pump deployment statistics: June 2026
Published 10 September 2026. UK retrofit installations, January-June 2026 compared with January-June 2025. Official Statistics in Development; excludes new builds and non-MCS installations.

[3] CCC - Progress in reducing emissions: 2026 report to Parliament
Published 24 June 2026. Sections 3.2.3, 4.3.2 and 4.5. The approximately 52,000 retrofit figure is the estimate in this report, rather than a claim that subsequent data cannot be revised.

[4] HM Treasury - Budget 2026
Published 28 October 2026. Warm Homes Plan capital savings, Boiler Upgrade Scheme funding and intended ZEV Mandate Review response.

[5] DfT - Vehicle licensing statistics: April to June 2026
Published 23 September 2026. Table 3 / VEH1103a: licensed road-using vehicle stock and zero-emission shares. ZEV includes BEVs and a small fuel-cell category.

[6] DfT - Vehicle licensing statistics data tables
VEH1153a: UK road-using battery-electric cars first registered in Q1 and Q2 2026, by company/private keepership. Counts published in thousands; derived totals are approximate.

[7] SMMT - Year-end push lifts EV sales but Mandate gap set to widen
Published 5 November 2026. January-October registrations and November market outlook for 2026-2028. SMMT is the motor-industry trade body; its outlook is a forecast and its reform call is an industry position.

[8] CCC - The Seventh Carbon Budget
Published 26 February 2025. Section 3.2, surface transport: new electric cars at 55% of sales in 2027 and around 95% in 2030. These are modelled pathway assumptions.

[9] HM Treasury - The Data Centre Covenant
Published 28 October 2026. UK requirement for 6 GW of AI data-centre capacity by 2030; connection prioritisation and a proposed temporary on-site power framework.

[10] NESO - What is the Ten-Year Outlook 2026?
2026 explanatory note, page 2. Distinguishes the outlook from a target pathway and warns that data-centre attraction policies could increase usage faster than assumed.

[11] DESNZ - Boiler Upgrade Scheme statistics: September 2026
Published 29 October 2026. Commentary and Table M1.1: voucher applications and paid redemptions. England and Wales; administrative events, not the UK retrofit installation series.

[12] RAC Foundation - At least one in twenty car miles driven is now zero emission
Published 18 July 2025. Estimated 5.3% of UK car mileage at the end of 2024. Historical mileage reference, not a 2026 estimate.

[13] UK Parliament - Petition 780321
Suspend Climate Change Act targets & undertake a full national impact assessment. Created by Shane Oxer; open when checked on 9 November 2026.

Calculation notes. Housing: sum all English house records, including unknown-region records, then divide mains-gas counts by total house counts; the five-year figure is weighted, not an average of percentages. Annual totals match the independent summary table. Retrofit pace: 20,895 x 2 = 41,790; 450,000 / 41,790 = 10.768. Keepership: company 210.0 thousand / total 284.9 thousand = 73.71%. Forecast gap: headline mandate minus forecast, in percentage points.

The September 2026 retrofit deployment release was announced on 6 November for publication on 10 December 2026. June was therefore the latest available quarterly installation period used here. The headline is editorial opinion; this critique does not claim that no analyst or public body has examined these subjects.