Updated Analysis of the Latest REPD Figures – Q3 Data (October 2025), Released 19.11.25

1. Introduction

On **19 November 2025**, the Government published the latest **Q3 Renewable Energy Planning Database (REPD)** dataset, based on data updated to **October 2025**. This is the most authoritative and up-to-date national dataset tracking all renewable and storage projects through the planning system.

This article forms a comprehensive update to the earlier document *"Overview BESS Analysis for Feckenham"*, and incorporates:

- Full updated national and Midlands short-duration BESS figures
- Detailed comparison across **the last three REPD datasets** (April 2025, July 2025, Q3 October 2025)
- Graphical trend analysis showing deliverable capacity growth and oversupply
- Clear graphical overlay of **CP30 2030 and 2035 Government Targets**
- A sequential examination of "attrition" (withdrawn, refused, abandoned, or expired schemes)
- Demonstration that oversupply growth vastly exceeds attrition
- A detailed rebuttal of **Grenergy's repeated claim** that attrition justifies further BESS consents

The purpose of this additional article is to provide a complete sequential evidence base supporting the position that **no further BESS approvals are necessary or justified** in Feckenham or the wider Midlands region.

2. Updated National BESS Capacity – Q3 Data (October 2025)

The new 2025 Q3 REPD dataset records the following national BESS statistics:

- **Operational:** 3.27 GW
- **Under Construction:** 6.20 GW
- **Consented (including Revised / Awaiting Construction):** 65.83 GW
- **Total Deliverable:** **75.30 GW**

The Government's CP30 short-duration storage targets are:

- **27.1 GW by 2030**

- **28.7 GW by 2035**

National Oversupply:

- **178% above the 2030 target**
- **163% above the 2035 target**

The national system now possesses almost **three times** the required quantity of short-duration BESS.

This confirms that national need is not just met — it is exceeded to the point of saturation.

3. Updated Midlands BESS Capacity (West & East Midlands) – Q3 Data

The Q3 dataset shows the following Midlands figures:

- **Operational:** 0.36 GW
- **Under Construction:** 0.48 GW
- **Consented:** 9.90 GW
- **Deliverable:** **10.74 GW**

Midlands CP30 short-duration storage targets:

- **4.3 GW by 2030**
- **4.9 GW by 2035**

Midlands Oversupply:

- **+150% above the 2030 target**
- **+119% above the 2035 target**

The region around Feckenham now has **more than double** the required short-duration storage capacity.

4. Quarterly Trend Analysis – Deliverable Capacity (2025)

To understand the direction of travel, the national and Midland's datasets must be viewed across the last three quarterly REPD releases.

Table 1 – Deliverable BESS Capacity 2025 Trend

Period	UK Deliverable	Midlands Deliverable
April 2025 (Q1)	45.03 GW	6.26 GW
July 2025 (Q2)	68.05 GW	8.00 GW

Period	UK Deliverable	Midlands Deliverable
October 2025 (Q3)	**75.30 GW**	**10.74 GW**

Interpretation

- National deliverable BESS capacity has increased by **over 30 GW since April**
- Midland's deliverable BESS capacity has increased by **over 4.4 GW since April**
- Growth remains steep and continuous, not marginal

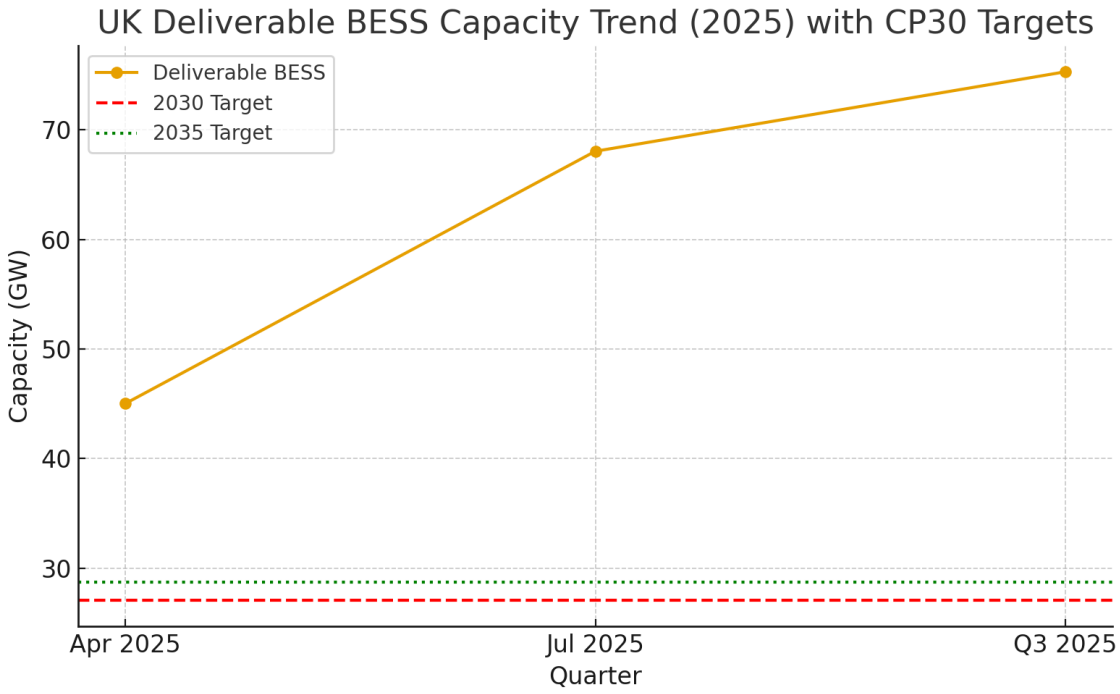
5. Trend Graphs with Government Targets Added

Below are the **updated graphs**, now with **Government CP30 2030 and 2035 targets shown in clear contrasting colours** to make the oversupply position instantly clear.

They help demonstrate:

- A sharply rising deliverable pipeline
- Flat Government targets
- A rapidly widening oversupply gap

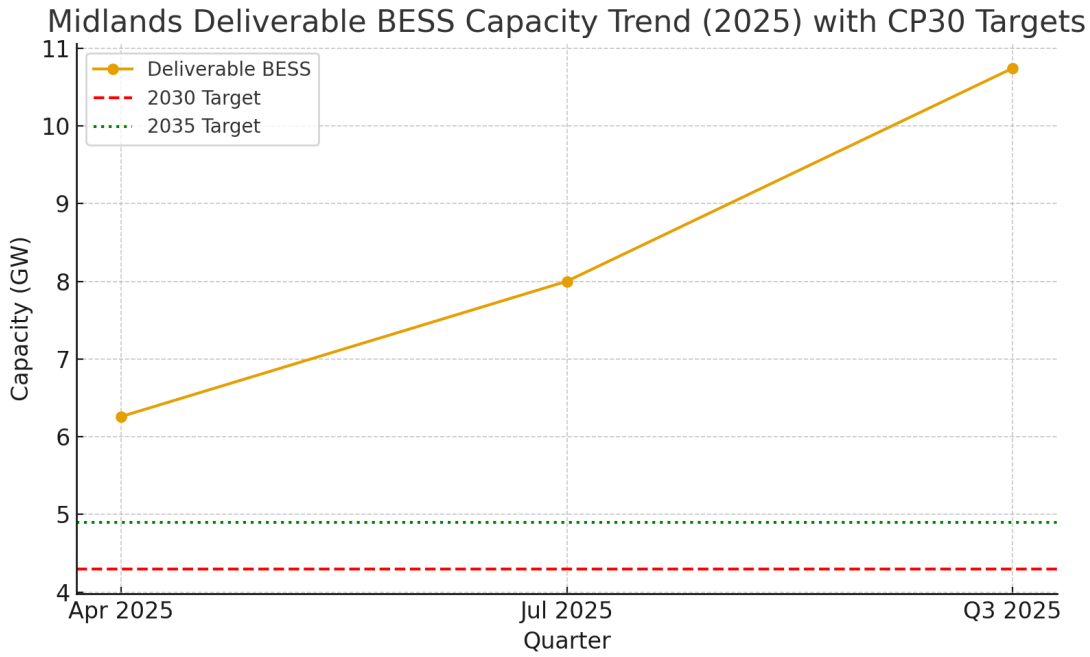
Figure 1 – UK Deliverable BESS Capacity Trend vs CP30 Targets (2025)



This shows:

- Deliverable capacity rising from 45.03 → 68.05 → 75.30 GW
- 2030 and 2035 targets completely overtaken
- Oversupply widening sharply every quarter

Figure 2 – Midlands Deliverable BESS Capacity Trend vs CP30 Targets (2025)



This shows:

- Midland's deliverable capacity rising from 6.26 → 8.00 → 10.74 GW
- Deliverable capacity now more than **double** required levels
- Oversupply developing earlier and faster than nationally

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6. Sequential Attrition Analysis (Withdrawn, Refused, Abandoned, Expired)

Developers frequently argue that because some schemes "drop out", new BESS consents are still required.

The REPD allows this attrition to be quantified precisely.

Table 2 – Total Measured Attrition (Since Early 2024)

- **Withdrawn: 1.84 GW**
- **Refused: 2.83 GW**
- **Abandoned: 1.23 GW**
- **Planning Permission Expired: 1.02 GW**
- **Appeal Refused: 0.11 GW**

Total Attrition So Far: 7.04 GW

However:

- New Consents Recorded in REPD 2025: over 30 GW
- Net Growth in Deliverable Capacity:
  +30.27 GW (new consents) – 7.04 GW (attrition) = +23.23 GW
- Oversupply is widening more than four times faster than attrition.
- Attrition is therefore not a risk — it is an ordinary and expected feature of the system.

Why schemes fall out of the pipeline

The reasons are well documented:

- Gate 2 filtering out schemes unable to secure viable grid connections
- Fire safety failures, including emergency water supply deficiencies
- Landscape and Green Belt conflicts
- Developer reprioritisation
- Inadequate or inaccurate design documentation
- Non-compliance with updated safety standards

These are **quality control filters**, not failures in national delivery.

7. Why Developer Attrition Arguments Are Wrong

Grenergy and others routinely assert: *"Because some BESS schemes are withdrawn or refused, new consents are needed to maintain progress toward CP30."* The REPD data disproves this conclusively.

The Key Problems with the Attrition Argument

1. **Deliverable capacity is expanding rapidly**
   +30.27 GW this year alone.
2. **Attrition is small in comparison**
   Only 7.04 GW.
3. **Oversupply is accelerating**
   As the graphs show, the deliverable pipeline grows faster than the targets approach.
4. **CP30 targets are already exceeded by a vast margin**
   Nationally and regionally.
5. **Failed commercial ventures do not create planning "need"**
6. **Oversupply invalidates claims of national necessity**
   Feckenham sits in the heart of the most "BESS oversupplied" region in the UK.
7. **The system is beginning to pivot away from short-duration BESS anyway**
   Future policy emphasises long-duration storage and firm zero-carbon capacity.

Developer attrition arguments therefore have no evidential basis, no policy basis, and no planning basis.

8. Final Conclusions (based upon Q3 Data – Issued 19.11.25)

Table 8 – Summary of National and Midlands BESS Capacity vs CP30 Targets, and Oversupply Trend (Q1–Q3 2025)

Metric	UK (GW)	Midlands (GW)
CP30 Target 2030	**27.1**	**4.3**
CP30 Target 2035	**28.7**	**4.9**
Q3 2025 Deliverable Capacity	**75.30**	**10.74**
Excess Above 2030 Target (GW)	**48.20**	**6.44**
Excess Above 2035 Target (GW)	**46.60**	**5.84**
% Excess Above 2030 Target	**178%**	**150%**
% Excess Above 2035 Target	**163%**	**119%**
Deliverable Capacity: Q1 → Q2 → Q3	**45.03 → 68.05 → 75.30**	**6.26 → 8.00 → 10.74**
New Consents (Q1–Q3 2025)	**30.27**	–
Attrition (All Types, Q1–Q3 2025)	**7.04**	–
Net Growth in Deliverable Capacity	**+23.23**	–

Interpretation and Planning Significance

The Q1–Q3 2025 figures show a **clear, accelerating oversupply** of short-duration BESS, nationally and in the Midlands:

- Nationally, deliverable capacity has risen **from 45.03 GW in April to 75.30 GW in the Q3 October dataset**.
- In the Midlands, deliverable capacity has risen **from 6.26 GW to 10.74 GW** over the same period.
- This growth is **far faster** than any attrition (withdrawn, refused, abandoned, or lapsed schemes).
- Nationally attrition totals only **7.04 GW**, while new consents amount to **30.27 GW** — meaning oversupply grew by **+23.23 GW** even after all losses.

This means:

- Both the UK and Midlands, the deliverable BESS Provision vastly exceed the CP30 2030 and 2035 BESS requirements by very large margins (178% nationally and 150% regionally for 2030).
- Oversupply is continuing to increase every quarter, with no indication of slowing.
- Attrition does not threaten delivery targets; it is marginal and expected.
- The Q3 dataset released on 19.11.25 presents the **strongest evidence yet** that short-duration BESS is already **fully delivered** for CP30.

Conclusion

The consolidated Q1–Q3 2025 REPD figures show:

- An **accelerating oversupply** of short-duration BESS
- National and Midlands capacity already **far above CP30 targets**
- Oversupply **growing over four times faster** than attrition
- No national or regional need for further short-duration BESS
- A **strong, evidence-based case** for refusing further speculative or Green Belt BESS proposals, including those around Feckenham

The latest data therefore strengthens and reinforces the conclusion that any additional BESS consents in the Midlands would be unnecessary, unjustified, and contrary to strategic energy system planning.

Developers increasingly argue that they are not required to demonstrate need, relying on NPPF paragraph 166(e)**,** which states that decision-makers *“should not require applicants to demonstrate the overall need for renewable or low carbon energy”*. However, in the context of short-duration BESS, the Q1–Q3 2025 REPD evidence shows that national and regional NEED has already been overwhelmingly met and exceeded**,** and therefore this policy now carries insignificant weight**.** Where proposals would cause harm to Green Belt, historic landscapes, conservation settings, or heritage-sensitive rural communities such as Feckenham and its surrounds**,** the absence of demonstrable need means that such harm cannot be justified**,** and the appropriate planning conclusion is refusal.
