

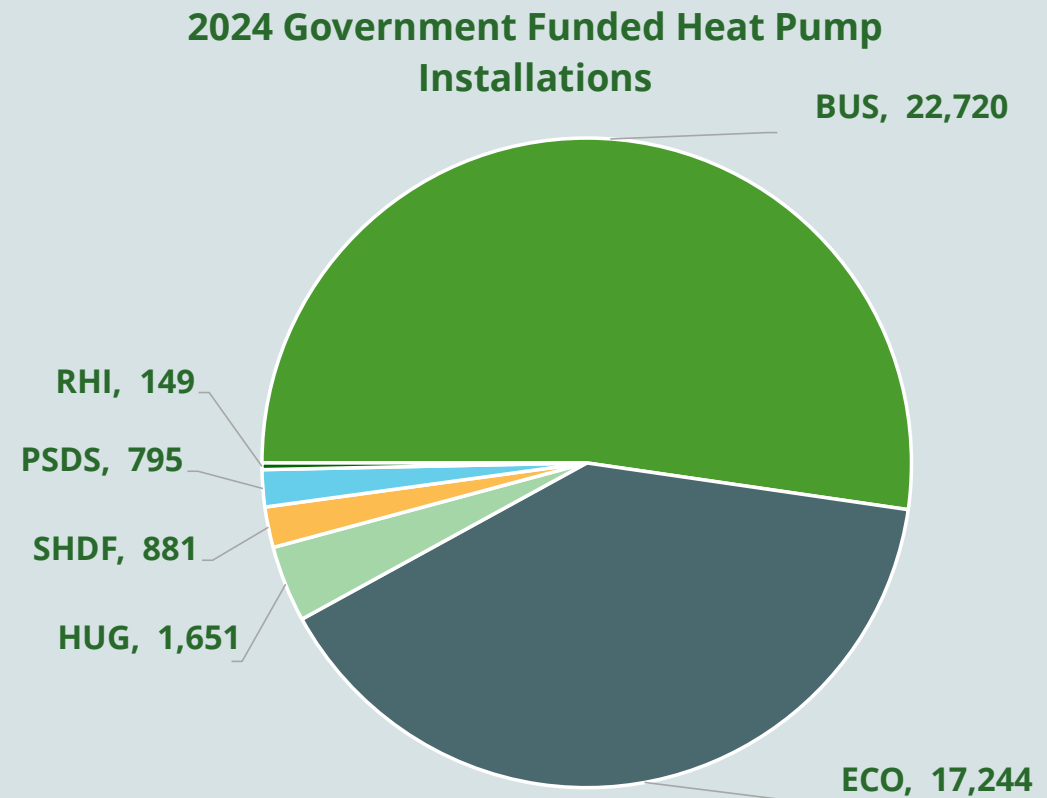
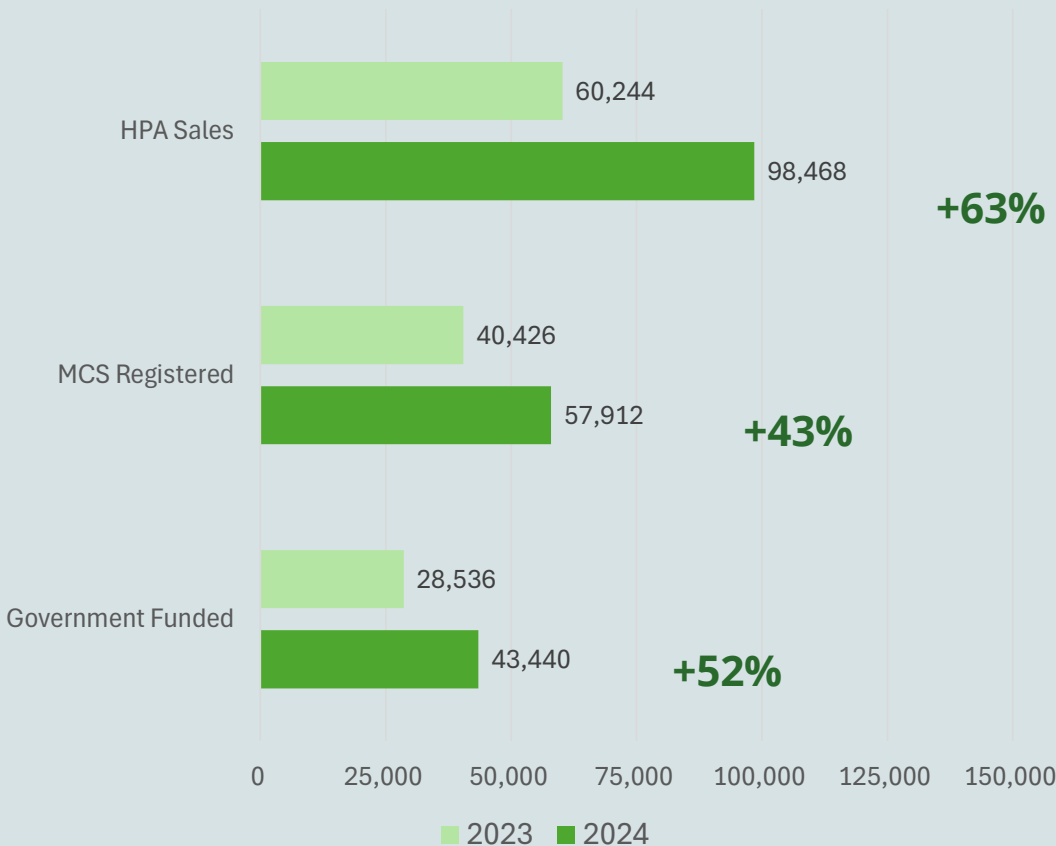
The role of heat pumps in decarbonisation and the value of standardised guidance

Charlotte Lee, Chief Executive
Heat Pump Association

21st May 2025

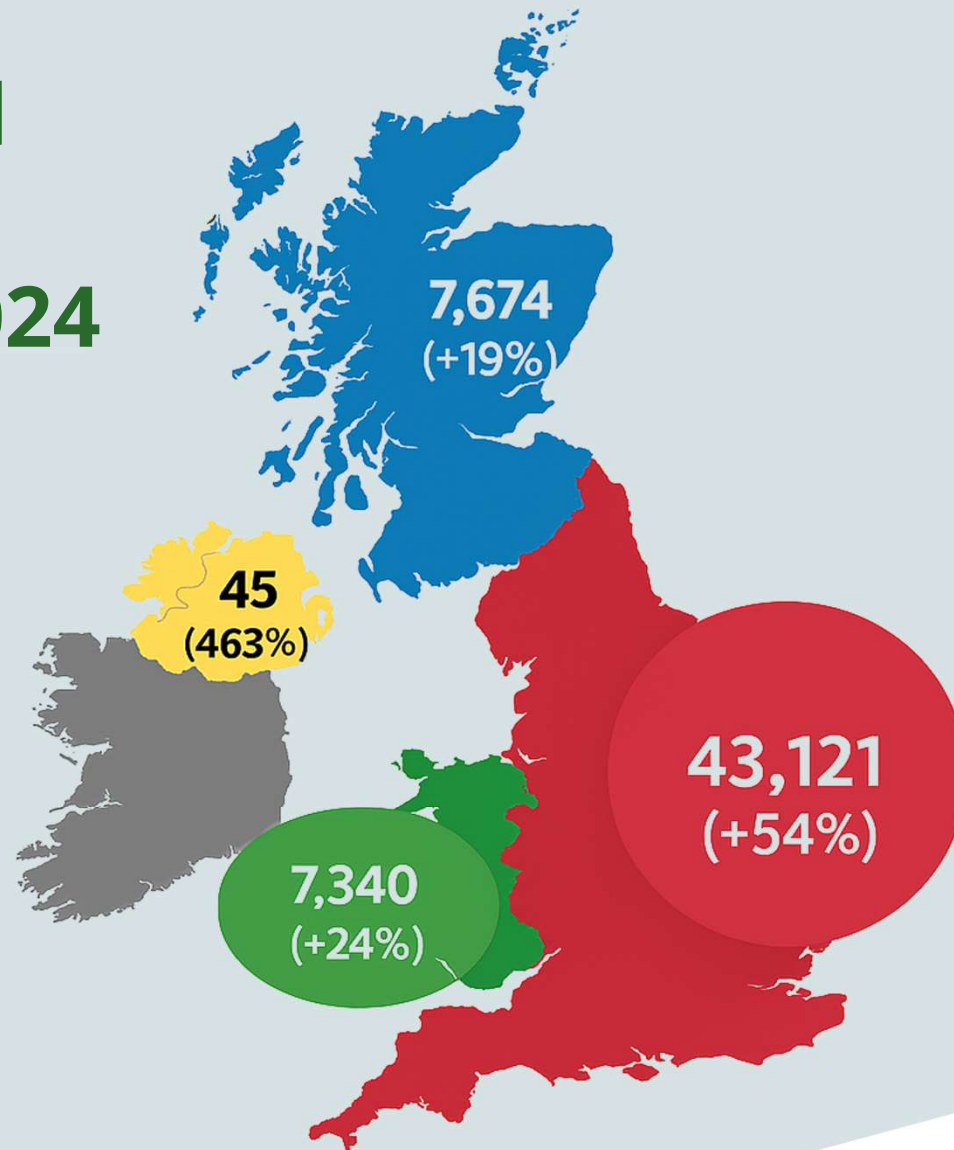


2024 Heat pump installation overview

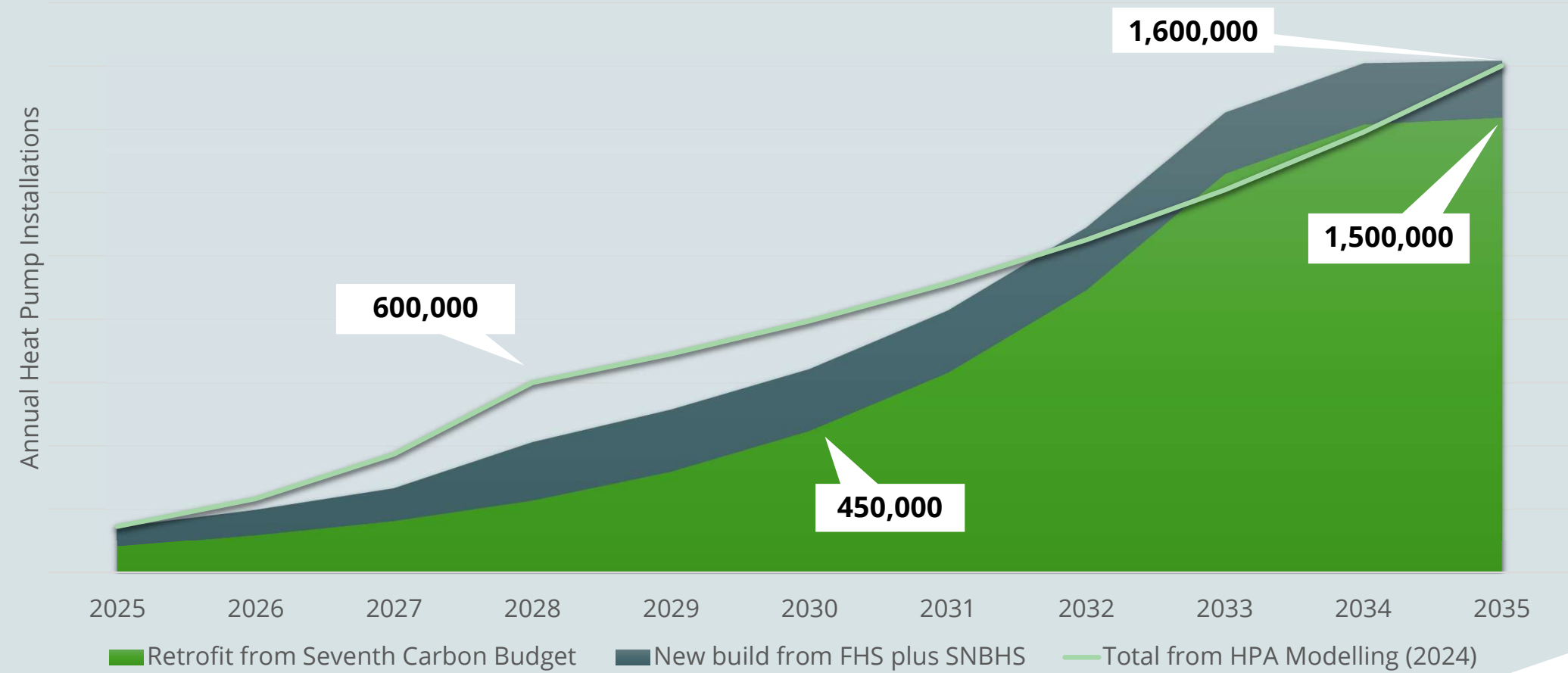


MCS Registered Heat Pump Installations 2024

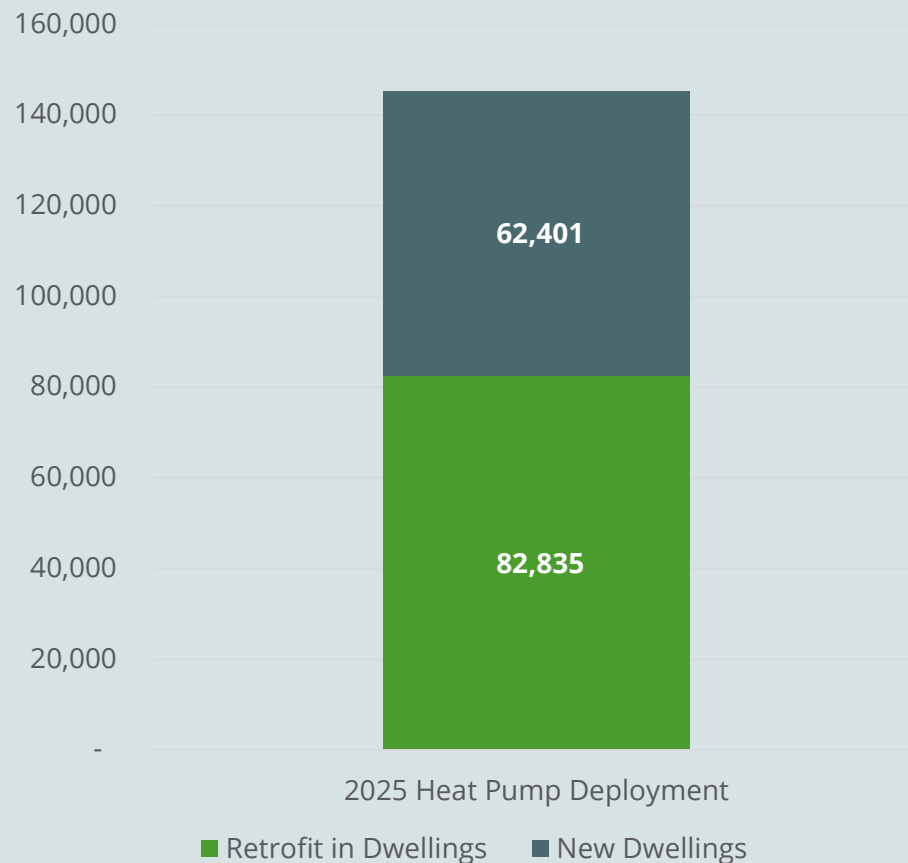
(% increase from 2023)



Where do we need to get to?



2025 Heat Pump Installation Expectations and Drivers

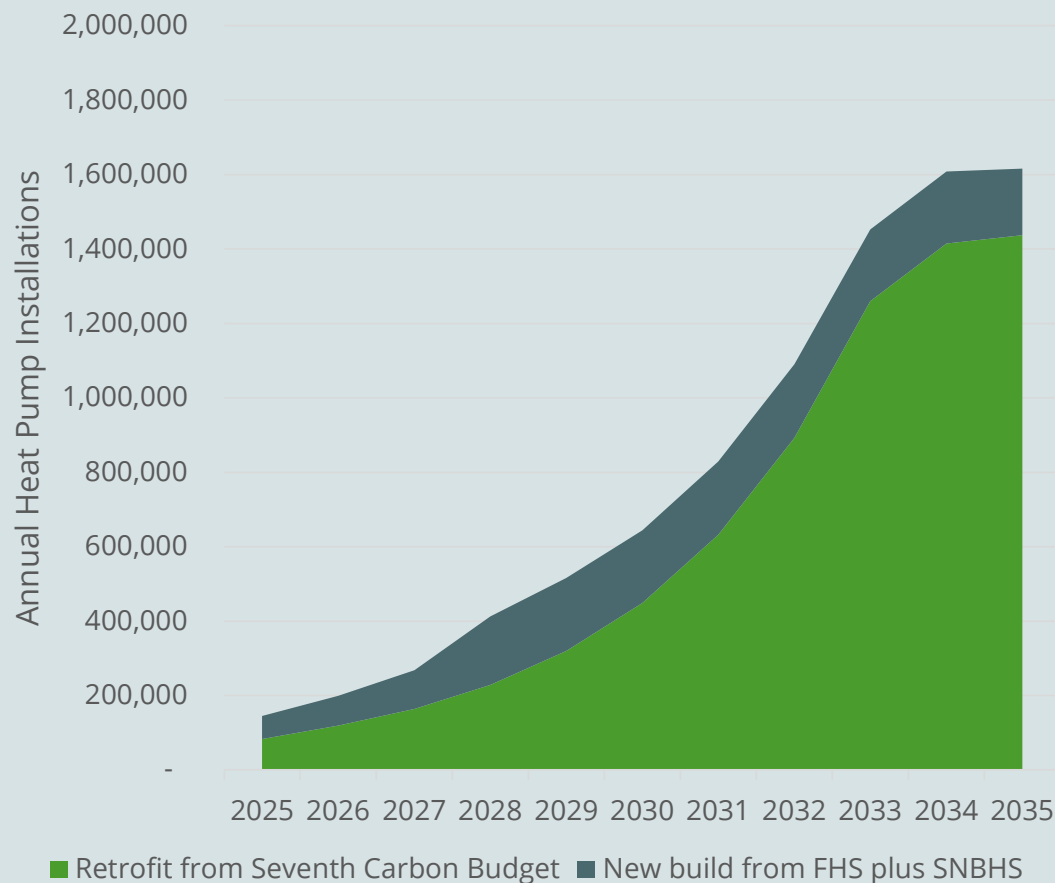


Source: CCC Seventh Carbon Budget Data

Drivers:

- Future Homes Standard introduction
- Scottish New Build Heat Standard
- 2021 Building Regulations Uplift
- Local Authority specifications going beyond 2021 Building Regulations
- **Boiler Upgrade Scheme**
- **Energy Company Obligation**
- **Clean Heat Market Mechanism**
- **Warm Homes: Local Grant**
- **Warm Homes: Social Housing Fund**
- **Home Energy Scotland**
- **Planning – Permitted Development**
- **PSDS**

Heat Pump Deployment – Beyond 2025



- **Seventh Carbon Budget**
 - By 2035 >25% of existing dwellings retrofitted with a heat pump
 - By 2050 80% of existing dwellings retrofitted with a heat pump (100% low carbon heating)
- **Training rates to deliver qualified heat pump installers**
 - Current rate = 9,062 per annum- up 15% on 2023.
 - Average rate to achieve deployment = 10,267 trained per annum

How are we going to accelerate growth over the next decade?

Policy and Regulatory Framework



Warm Homes Plan
Future Homes and Buildings Standard
Clarify timescales for phasing out new and replacement fossil fuel boilers
Heat Network Regulations
Decision on the role of Hydrogen for Home Heating

Market Reform and Incentives



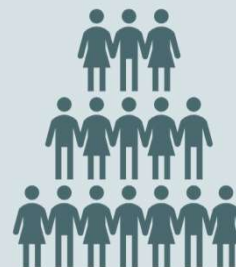
Rebalance electricity and gas prices
Reform EPCs to fairly reflect the value of low carbon heating
PRS Minimum Energy Efficiency Standards
Future of ECO

Infrastructure and Workforce Development



Heat Pump Installer Engagement
Industrial Strategy
Skills Action Plan
Grid Capacity work, DNOs and Flexibility

Consumer Engagement and Support



Continue to improve consumer awareness and advice
Ensure the consumer protection regime is fit for purpose

The role and value of trusted, standardised guidance

