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Industrial Strategy & Industry Trends | First Friday Club | 4th July 2025

Nikesh Mistry | Sector Head – Industrial Automation and Test & Measurement

Who are GAMBICA?



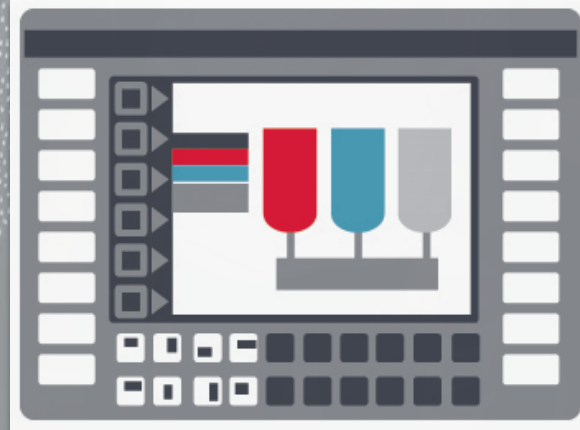
GAMBICA is the Trade Association
for Instrumentation, Control,
Automation and Laboratory
Technology in the UK.

Our insight and influence help our
members to be more competitive
by increasing their knowledge and
impact.

Together we remove barriers and
maximise the market potential in
our industry

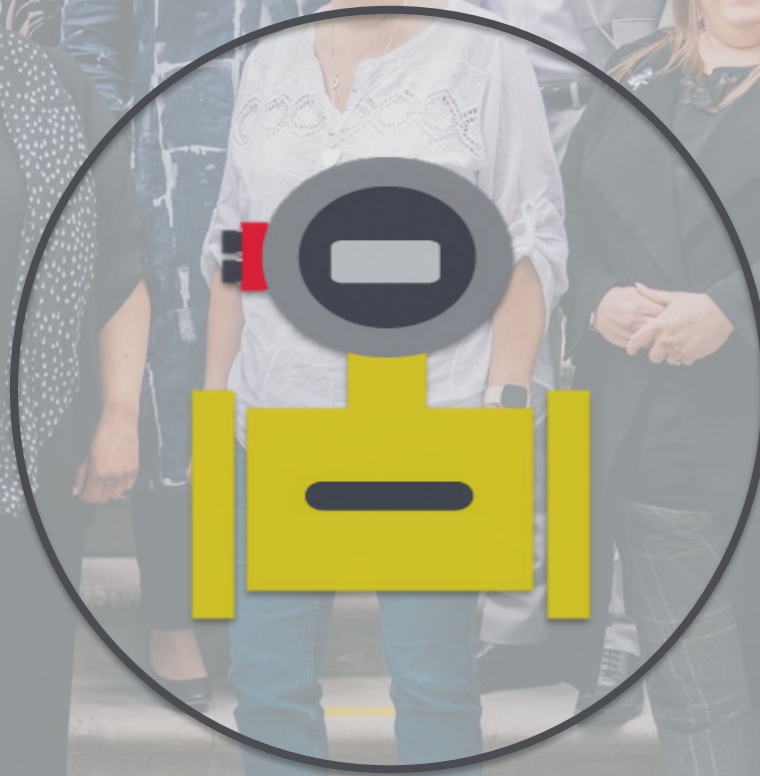


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Industrial Automation

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Process Instrumentation and Control

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Laboratory Technology

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Test & Measurement

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University Engagement

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**Through trade association best practice, develop and deliver
increasing value to our members**

ABC

Tr... ion best practice, develop and deliver
g value to our members



B2B
compliance

KNOWLEDGE



Briefings and updates
Future opportunities
Market data & trends
Economic forecasts
Opinion surveys
Standards & regulation
Technical consulting
Business support

INFLUENCE



Government policy
Legislation
International standards
Press campaigns
Conferences & events
Online & social media
Promoting the benefits of technology

COMMUNITY



Network of members, academia, government, media, associations and other related stakeholders
International exhibitions
Trade missions
Events, seminars, consultations and training
London office meeting facilities and work space

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ABOUT GAMBICA



Through training and information best practice we help our members deliver value to our members



Briefings and updates

Future opportunities

Member services



INFLUENCE



Government policy

UK and EU regulation

International standards

Press campaigns

Conferences & events

Online & social media

Promoting the benefits of technology



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Network of members, academics, government, media, institutions and other related stakeholders

International

Technical committees

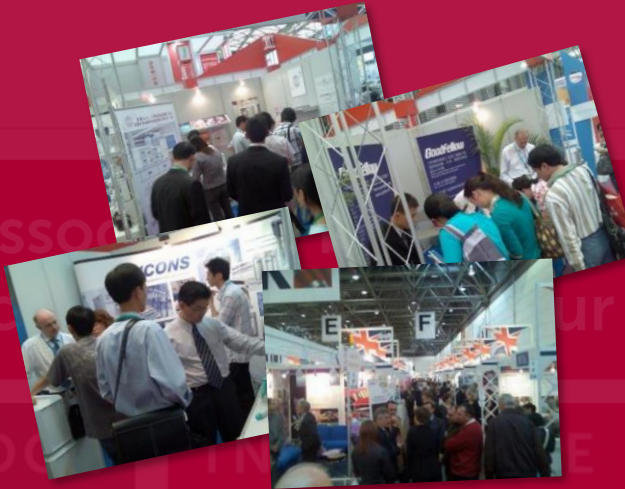
European standards, consultations and training

London office meeting facilities and work space

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ABOUT GAMBICA

Through trade association, develop
inc our members



KNOWLEDGE



Briefings
Future of
Market of
Economic
Opinion surveys
Standards & regulation
Technical consulting
Business support



Press campaigns
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Industrial Automation Sector



FESTO



SIEMENS

*solutions***pt**
Industrial IT Solutions



BECKHOFF
New Automation Technology



OMRON

INNOMOTICS



Lenze



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The Modern Industrial Strategy

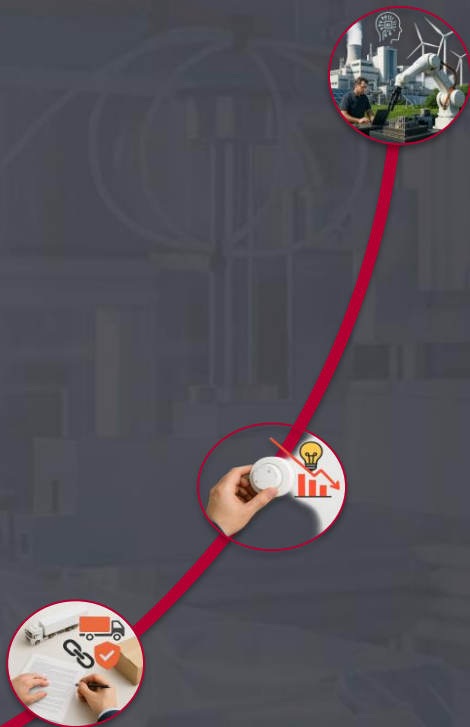


The Modern Industrial Strategy

- **Ease of Doing Business**
 - *Energy Costs*
 - *Grid Connections*
 - *Cutting Regulatory burdens*
- **Support for City Regions & Clusters**
 - *Targeted investments*
 - *£600M Strategic Sites Accelerator*
- **Sector-Specific Plans**
 - *IS8 – Advanced Manufacturing, Clean Energy, Creative Industries, Defence, Digital & Technologies, Life Sciences, Professional & Business Services*
- **Innovation & R&D**
 - *£22.6 billion by 2029/30*
- **Skills & Workforce Development**
 - *Skills England*
 - *Creating Technical Excellence Colleges*
- **Public Procurement & Investment**
 - *Leveraging government purchasing power to support UK Industries*
 - *Commercial Innovation Hub*

The Modern Industrial Strategy

UK's Modern Industrial Strategy, a long-term plan aimed at enhancing economic growth, stability, and investment across key sectors to improve living standards and resilience in a changing global landscape



Advanced Manufacturing Sector Plan



- Double annual business investment in advanced manufacturing by 2035 to £39 billion
- £4.3 billion in funding, including £2.8 billion for R&D over the next five years.
- Expansion of the Made Smarter Adoption programme to accelerate robotics and automation.
- Pilot initiatives for electric vehicle manufacturing clusters in the North East and West Midlands.



Advanced Manufacturing Sector Plan

vehicle manufacturing clusters in the North East and West Midlands.

- Energy cost relief for energy-intensive manufacturers
- Robotics Adoption Hubs: A new national network to support SMEs in integrating robotics and autonomous systems
- £2 billion AI Action Plan (from the 2025 Spending Review) to scale responsible AI and automation across sectors including manufacturing.



Advanced Manufacturing Sector Plan

the 2025 Spending Review) to scale responsible AI and automation across sectors including manufacturing.

- £4 billion Industrial Strategy Growth Capital via the British Business Bank to support automation-aligned innovation.





Energy Cost Reduction

British Industrial Competitiveness Scheme (2027)



- Removes green levies (e.g. Renewables Obligation, Feed-in Tariffs, Capacity Market) from bills
- Up to £40/MWh reduction, potentially cutting bills by 25% for 7,000+ manufacturers
- Applies to sectors like automotive, aerospace, chemicals, and food processing





Energy Cost Reduction

British Industry Supercharger (2026)

- Boosts network charge discounts from 60% to 90% for ~500 energy-intensive firms (steel, ceramics, glass)
- Helps protect jobs and competitiveness in foundational supply chain sectors



Connections Accelerator Service (2025)

- Streamlines grid access for new





Energy Cost Reduction

Connections Accelerator Service (2025)



- Streamlines grid access for new factories and expansions
- Prioritises projects with high job creation and economic impact
- May include reserved grid capacity for strategic industries





Supply Chain Resilience



£600m Strategic Sites Accelerator

- Unlocks land for logistics and advanced manufacturing hubs
- Targets planning, infrastructure, and grid bottlenecks



National Supply Chain Centre

- Coordinates public/private investment across freight corridors, ports, and warehousing clusters





Supply Chain Resilience



National Supply Chain Centre

- Coordinates public/private investment across freight corridors, ports, and warehousing clusters
- Works with devolved governments and industry to align infrastructure with sector needs

Supply Chain Observatory

- Monitors vulnerabilities, dependencies, and critical inputs (e.g. semiconductors, rare earths)





Supply Chain Resilience



Supply Chain Observatory

- Monitors vulnerabilities, dependencies, and critical inputs (e.g. semiconductors, rare earths)
- Informs future interventions and trade policy - Electrification of key rail routes (e.g. Transpennine)





Skills Development



£1.2bn/year by 2028–29

- Focused on IS-8 sectors (advanced manufacturing, clean energy, digital, etc.)
- Supports upskilling, reskilling, and lifelong learning



Skills England

- Replaces IfATE with a broader remit
- Aligns training with industrial needs and migration policy
- Oversees the new Growth and Skills Levy



Skills Development



Apprenticeship Reforms

- Minimum duration reduced from 12 to 8 months (in shortage areas)
- English/maths requirements relaxed for 19+ learners
- Youth Guarantee ensures all 18–21-year-olds access to training or employment

Foundation Apprenticeships & SME Incentives

- Rebalancing funding toward entry-level pathways



Skills Development



Foundation Apprenticeships & SME Incentives

- Rebalancing funding toward entry-level pathways
- Enhanced support for small employers to take on apprentices



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GAMBICA - IA vs UK MANUFACTURING



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Low-Voltage Power
Switchgear and
Controlgear
Assemblies

Industrial Automation
Sector

Technical
Guide
Edition 4: 2025


www.gambica.org.uk






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ENVIRONMENTAL IMPACT SURVEY - 2022



Company name:

Contact name:

Contact email:

Submitted at any time up to 15 December 2023. Individual results will be returned within 3 weeks. To be included in year end industry benchmarking, please submit your 2022 data by 15 December 2023.

Year 2022		
Headcount	<input style="width: 100%;" type="text"/>	Full time equivalent (FTE) on 31st Jan
Turnover (000s)	<input style="width: 100%;" type="text"/>	For UK Operations Full Financial Year
Site Type	<input style="width: 100%;" type="text"/>	Please select from drop down list
Area in m ²	<input style="width: 100%;" type="text"/>	
Registered	<input style="width: 100%;" type="text"/>	(as notified by a registered body e.g. R01, UKAS)
Electricity (kWh)	<input style="width: 100%;" type="text"/>	Enter the total no. of kilowatt hours from your bills. Include all electricity used from the grid i.e. excluding renewable usage
Gas (kWh)	<input style="width: 100%;" type="text"/>	Enter the total no. of kilowatt hours from your bills. Include all natural gas used from the grid. Other gases types will require additional reporting
Water Supply Treatment	<input style="width: 100%;" type="text"/>	Describe the water supply treatment
Company Cars - Scope 1	<input style="width: 100%;" type="text"/>	Enter total litres or miles used by company cars in driving to and from places of work (please select litre or mile from drop down box according to how your company collects this data)
Plug-in hybrid Electric Vehicle	<input style="width: 100%;" type="text"/>	
Battery Electric Vehicle	<input style="width: 100%;" type="text"/>	

New tender alert service

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Company Cars - Scope 1	<input style="width: 100%;" type="text"/>	
Distance	<input style="width: 100%;" type="text"/>	Litres / Miles (litres per gallon)
Fuel type	<input style="width: 100%;" type="text"/>	Number of vehicles
Plug-in hybrid Electric Vehicle	<input style="width: 100%;" type="text"/>	
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New tender alert service



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**ENVIRONMENTAL
IMPACT
CHAMPION**



for the calendar year 2022

1	Company Information	Headcount	<input type="text"/>	full time equivalent (FTE) on 1st Jan	
		Turnover (£000)	<input type="text"/>	for UK operations full financial year	
		Site Type	<input type="text"/>	please select from drop down list	
		Area m ²	<input type="text"/>		
2	Company ISO14001 Certified	<input type="text"/>	(certified by a registered body eg BSI, UKAS)		
		<input type="text"/>			
3	Electricity - Scope 2 (exc renewables)	<input type="text"/>	kWh	Enter the total no. of kilowatt hours from your bills. Include all electricity used from the grid i.e. excluding renewable usage	
		<input type="text"/>	kWh	Enter the total no. of kWhours from your bills. Include all natural gas used from the grid. Other gas types will require additional reporting	
4	Gas (Natural) - Scope 1	<input type="text"/>	kWh		
		<input type="text"/>	kWh		
5	Water - Scope 3 (Supply + Treatment)	<input type="text"/>	cubic metres	Enter the volume used from your water bills	
		<input type="text"/>	cubic metres		
6	Company Cars - Scope 1		Litres / Miles (please select)	Number of vehicles	
		Diesel	<input type="text"/>		
		Petrol	<input type="text"/>		
		Plug-In Hybrid Electric Vehicle	<input type="text"/>		
		Battery Electric Vehicle	<input type="text"/>		

Enter total litres or miles used by company cars including to and from places of work (please select litre or miles from drop down box according to how your company collects this data)





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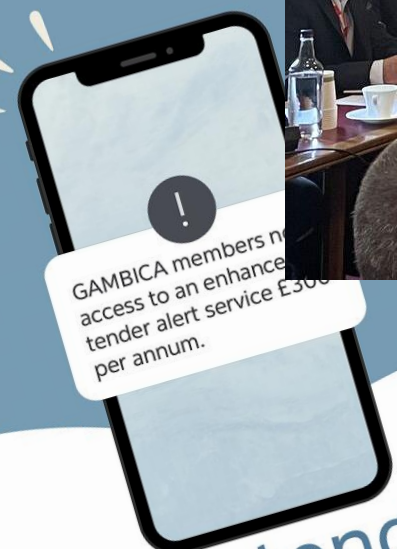
The GAMBICA Association Ltd
Rotherwick House
3 Thomas Moore Street
London E1W 1YZ
T +44 (0)20 7642 8080
E info@gambica.org.uk
W gambica.org.uk

Association for Instrumentation, Control, Automation and Laboratory Technology in
the manufacture or supply technical products in the sectors of automation,
laboratory technology and test & measurement.

ICA sectors
a market of

30% of member sales are exported globally
We have over 80 experts nominated to standards committees
180 UK CER GAMBICA
90% GAMBICA members represent over 75% of our industry sectors.

Information, discussion or detail, please contact:
steve.brample@gambica.org.uk



New tender alert service




Representing the Instrumentation, Control, Automation and Laboratory Technology industries in the UK
The GAMBICA Association Ltd
Registered in England & Wales No. 085024

- What dynamics explain it?**
- Short-term vision on investment cycles, low risk appetite by lenders and requirement for short payback periods by investors deters capital investment approvals
 - Political and economic instability over the last decade have increased uncertainty which further reduces risk appetite for longer term investment in UK equipment and machinery. Leaving the EU was disruptive and caused widespread uncertainty over the lengthy transition period, causing some businesses to prioritise investment outside of the UK.
 - A further impact of leaving the EU required additional labour to manage compliance across both markets and the logistical challenges of trading across both markets. This additional cost further decreases funding available to invest in technology solutions.
 - The cost of business in the UK is a key factor, with many looking at costs such as energy prices and employment costs such as employer National Insurance Contributions.
 - Make-do-and-mend attitude prevails, with pride in keeping old equipment running long past intended lifespan. This is often inefficient for both energy and productivity, with higher running cost in maintenance and downtime.




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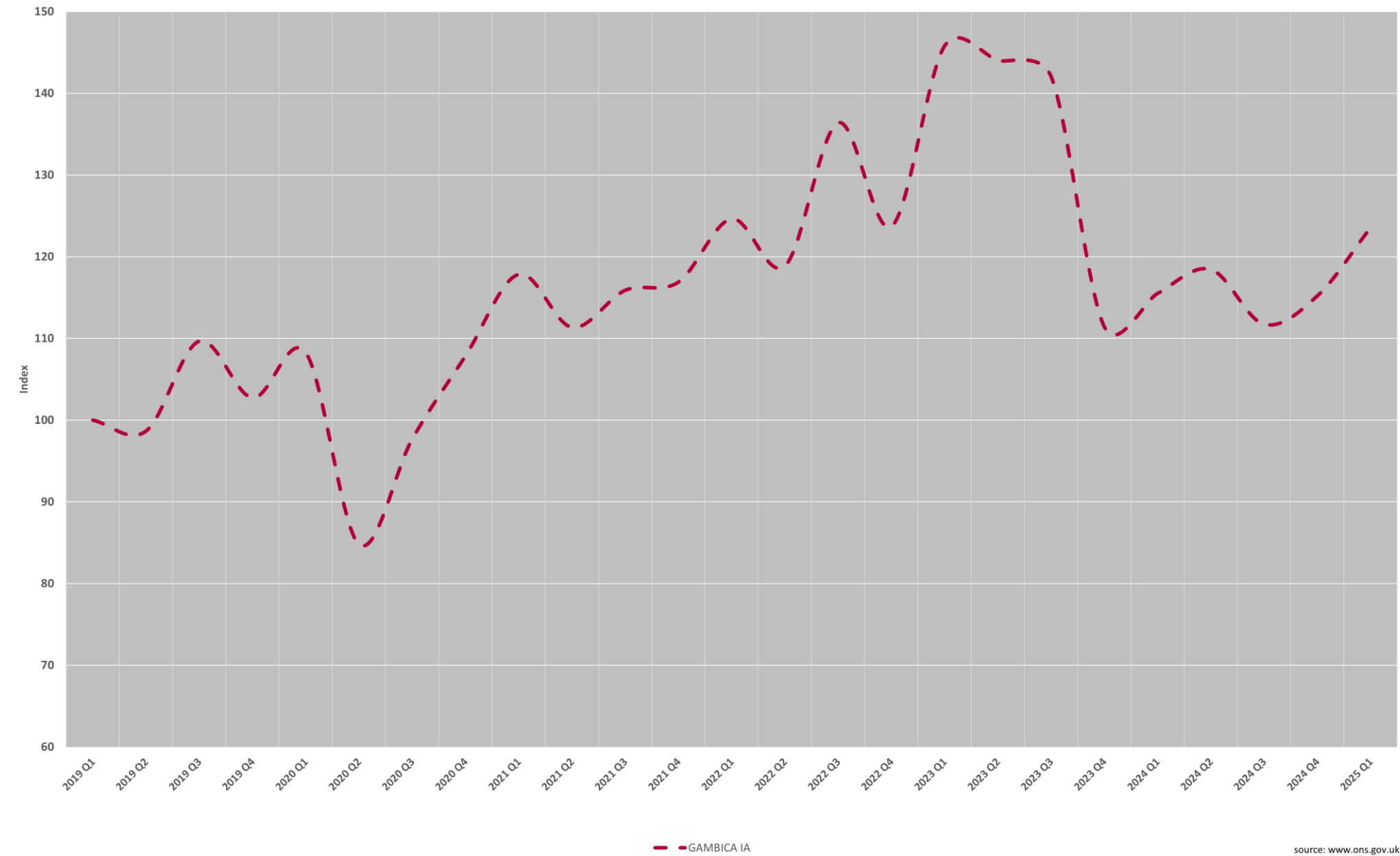
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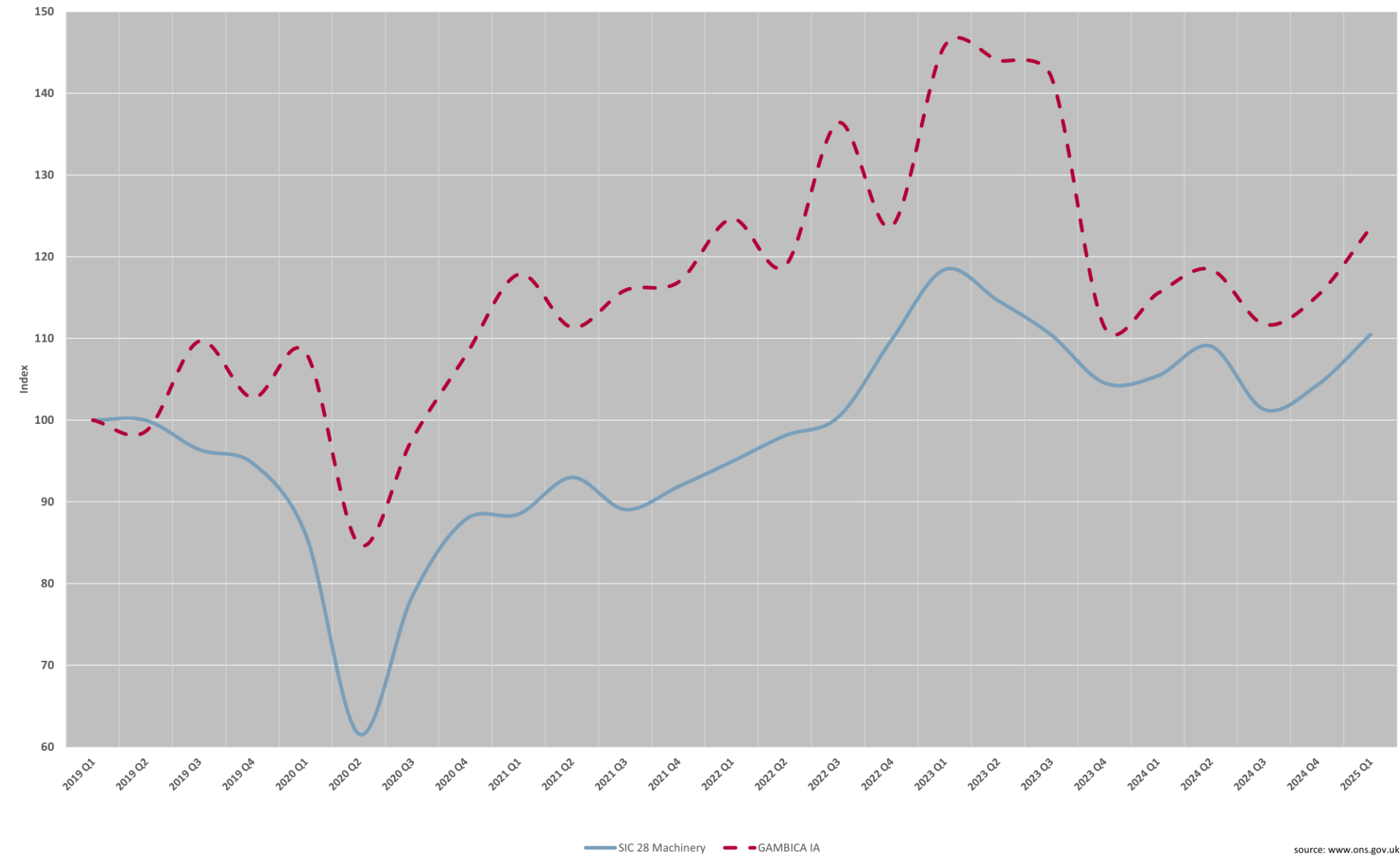
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New tender alert service

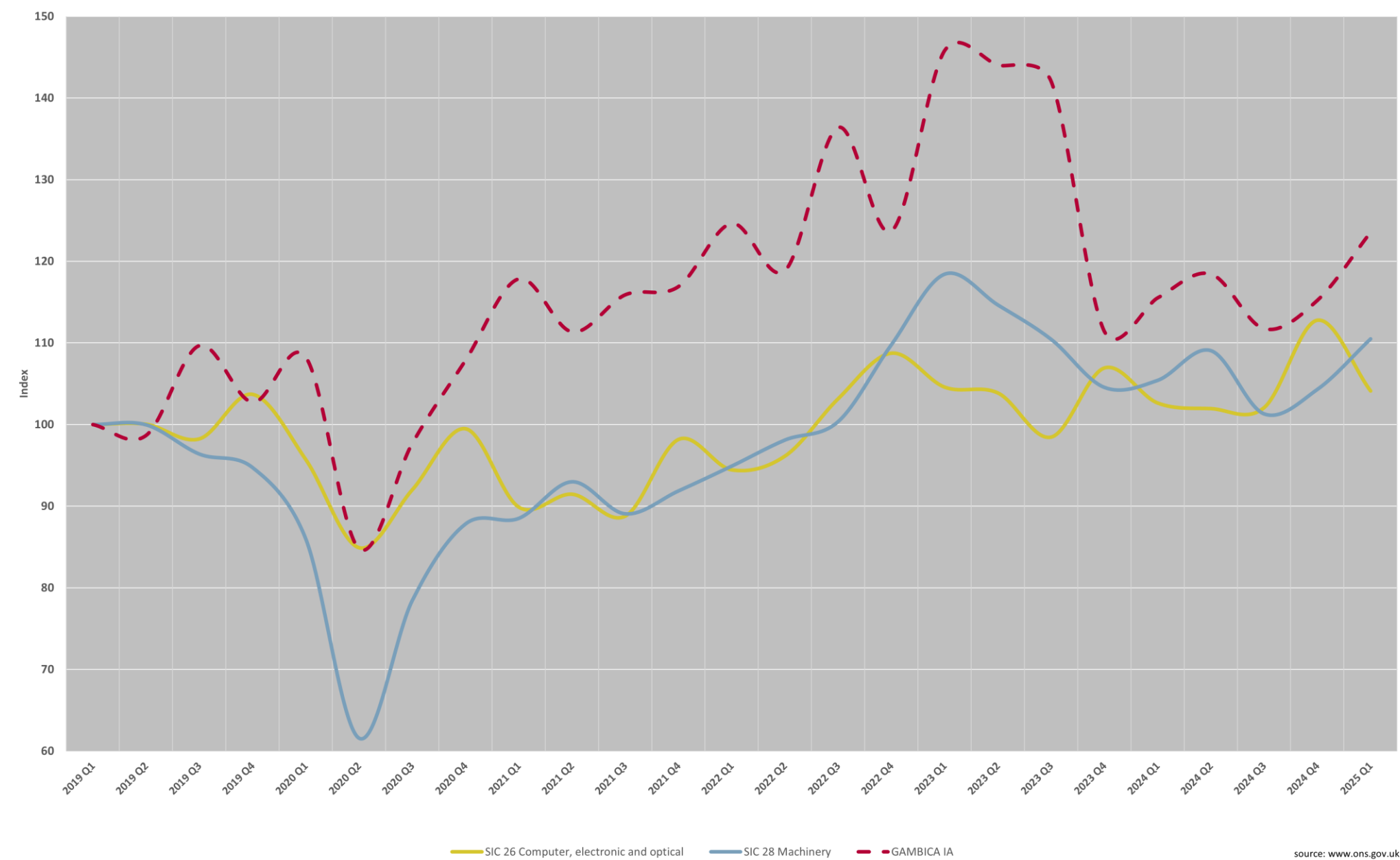
GAMBICA - IA vs UK MANUFACTURING



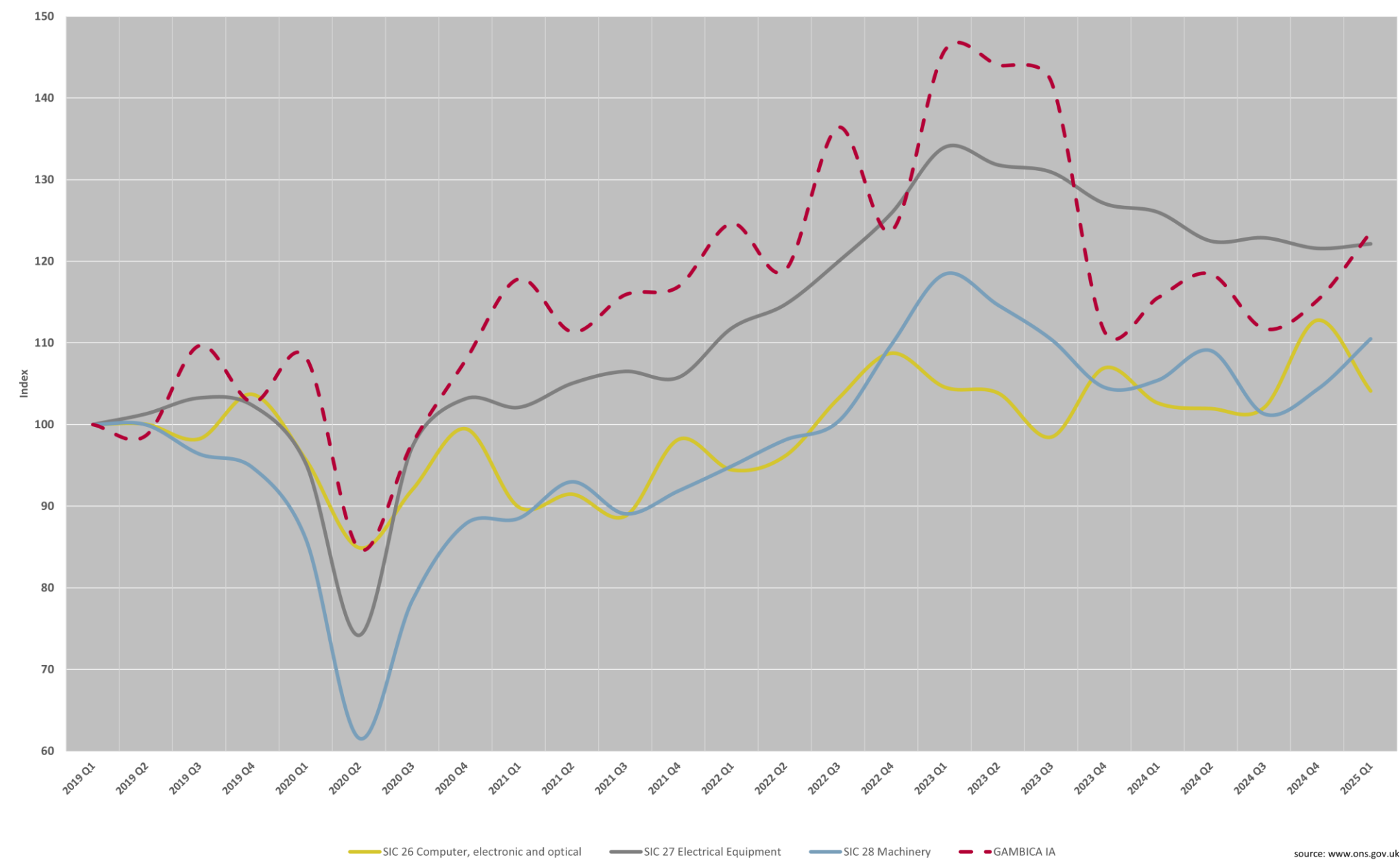
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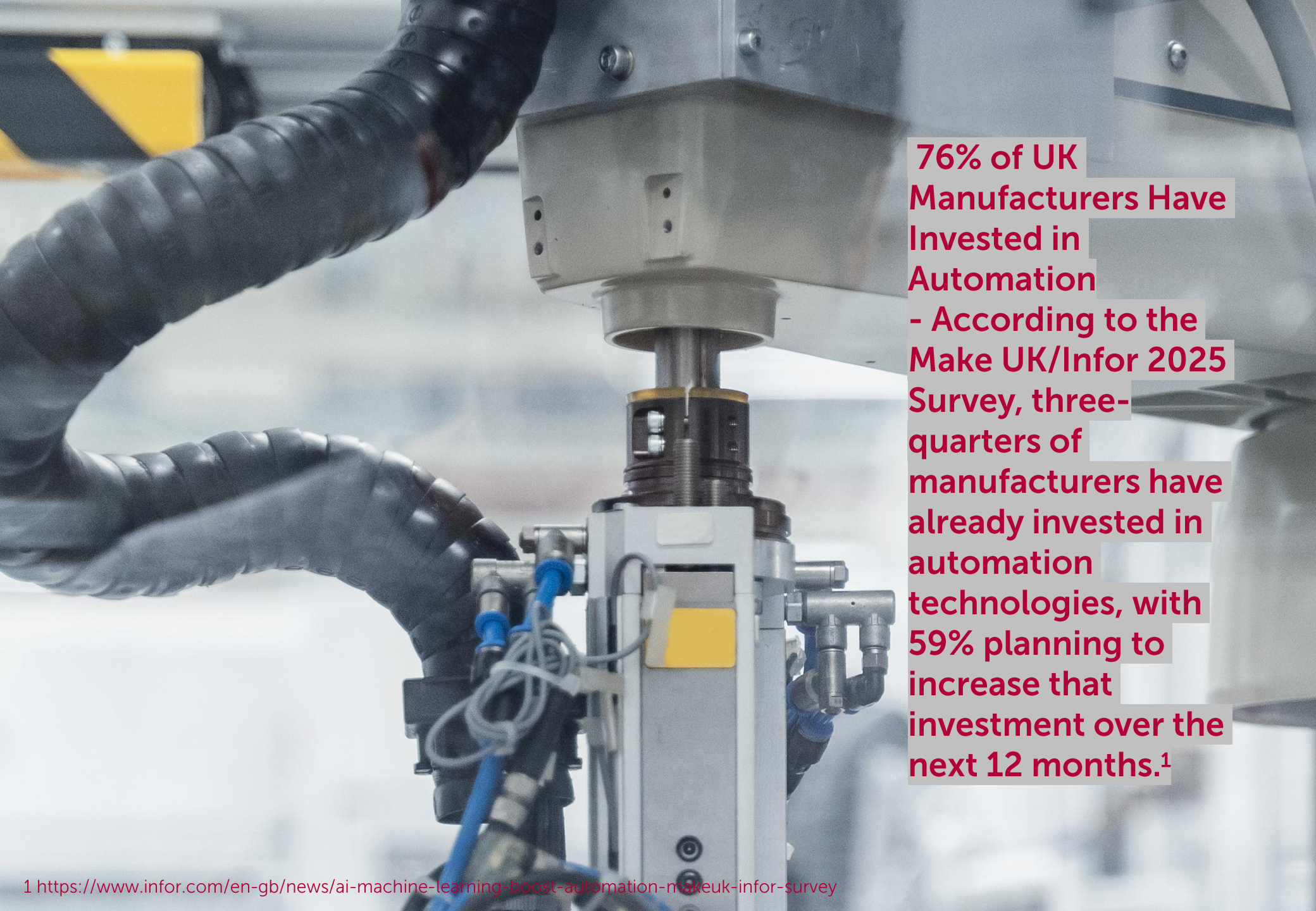


GAMBICA - IA vs UK MANUFACTURING



GAMBICA - IA vs UK MANUFACTURING





76% of UK Manufacturers Have Invested in Automation
- According to the Make UK/Infor 2025 Survey, three-quarters of manufacturers have already invested in automation technologies, with 59% planning to increase that investment over the next 12 months.¹

¹ <https://www.infor.com/en-gb/news/ai-machine-learning-boost-automation-makeuk-infor-survey>

A close-up, vertical view of an industrial robotic arm. The arm is primarily silver and grey, with a yellow rectangular label near the top. It is heavily equipped with various cables, including blue and black ones, which are bundled together. The background is a blurred industrial setting with other machinery and structures.

The UK robotics market is projected to reach £1.7 billion in 2025 and growing at over 16% CAGR – it's forecast to hit £3.1 billion by 2029²



92% of manufacturers believe smart manufacturing & automation will be the main driver of competitiveness over the next three years.

10–20% increase in production output

**–
7–20% improvement in employee productivity³**

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Thank you

Any Questions?

Get in touch to get involved!

Nikesh Mistry | nikesh.mistry@gambica.org.uk | +44 782 684 5773