

Executive Summary

The Covid-19 pandemic is triggering significant and lasting changes across all dimensions of European society: from the way we interact with each other, to our hopes for tomorrow's world; from the relevance of our jobs, to our remote working dynamics; from travelling, to education, and so on.

Electrical contractors, just as any trade, are at a turning point. The good news is that these professionals are experts at solving problems – this is what they do all day long, whether it is integrating state-of-the-art lighting systems into heritage buildings or retrofitting a family house on a limited budget.

Electrical contractors acknowledge that Covid-19 creates a systemic risk for **a trade that is comprised of nearly 2 million workers across Europe**, with a vast majority of them working for small and medium-sized enterprises. Nonetheless, they are still hopeful for the future because they know **their trade is becoming even more relevant in tomorrow's world**, provided that all public and private stakeholders take concrete action. Under this condition, the “new normal” can lead to a useful re-setting of policy, commercial, and operational strategies to enact digital and green transitions.

All sectors were taken off guard when Covid first struck, and **now is the right time to be proactive and to identify new or increased opportunities**. By contributing to making tomorrow's world greener, more comfortable, safer, and increasingly digital, electrical contractors can also expand their businesses.

It is important to emphasise that most of the leads that are explored below are already being implemented by electrical contractors in particular European regions, but there is undeniably room to develop these future-proof business opportunities further.

This report is organised as such:

- I. New societal priorities and the role of electrical contractors to address them:** mitigating climate change with a green recovery / improving indoor life quality / transforming ways of working.
- II. New or increased business opportunities** that electrical contractors are developing to make a positive change in the “new normal” – from services to integration, from digitalisation to decarbonisation, from consumer empowerment to contactless technologies.
- III. Areas of vigilance** that have been exacerbated since Covid, especially the risk that recovery plans favour a quick fix rather than an ambitious green and digital transition.
- IV. Policy asks to switch on the digital and green transitions for all Europeans.**

This document is relevant for:

- **Electrical contractors** looking to bounce back and strengthen their position in the value chain;
- **Actors across the entire value chain** seeking to contribute to a green and digital transition;
- **Policymakers** aiming to achieve the best possible recovery from Covid-19.

Electrical contractors at the forefront of a green & digital recovery for Europe



Main business opportunities

- 1 Electrical contractors are **upskilling and developing their service offer** in the context of upcoming recovery plans
- 2 Electrical contractors are **integrators** who know how to address all three rising societal priorities
- 3 Electrical contractors are **at the forefront of the digital change**
- 4 **Combining digital & green transitions**
- 5 **Containing the pandemic** with contactless technologies
- 6 **Infrastructure** is key on the road to recovery

Main enablers for these opportunities

- 7 **New ways to work:** since Covid-19, electrical contractors are developing best practices to make the most of their activity in every situation
- 8 **Attracting new (young) workers**
- 9 **Increasing visibility** in public affairs and along the value chain

Areas of vigilance

- ⚠ A **fast recovery** could be preferred to a green recovery (risk of a “quick fix”)
- ⚠ The electrical contracting sector mostly comprises **SMEs & VSEs** which are particularly sensitive to crises
- ⚠ Rise of **e-commerce & DIY** could undermine electrical contractors' expertise and be a safety risk
- ⚠ Short-term concern: **slowdown of demand and shortages** in the supply chain
- ⚠ Medium-term concern: **shortages in new and skilled workers**