

The Electricity Networks Sector Growth Plan

October 2026

The trade association for energy infrastructure & systems

energynetworks association

Contributing partners

Members

Members

Other Partners

Government, Regulator, System Operator

Other Organisations

Delivery Partners

The participants listed here contributed directly to development of these reports through their respective trade association and/or participation in working groups.
Thank you to the many additional individuals and organisations who provided insight, data and support.

Foreword from ENSGP: Cordi O'Hara and Phil Dingle

Great Britain is undertaking the largest, most ambitious expansion of its electricity networks since the creation of the national grid a century ago. While this transformation is vital for delivering secure, affordable and clean power, its significance extends far beyond energy infrastructure. It represents one of the most powerful tools we have to re-industrialise our regions, strengthen domestic manufacturing, and drive sustainable economic growth across every corner of the UK.

Over the next decade, up to £200 billion will be invested to maintain, expand and modernise our transmission and distribution grids. The central ambition of this Electricity Networks Sector Growth Plan is to ensure that this unprecedented investment directly benefits British communities, workers and businesses. Our goal is to capture up to 72p of every pound spent within the UK economy, anchoring value locally, supporting domestic supply chains and supporting over 210,000 high-quality jobs by 2035.

Following the baseline commitment set out in our Interim Report, extensive analytical work has been undertaken alongside an expert consortium (comprising LCP Delta, EA Technology, Frontier Economics, and Energy & Utility Skills) to establish the rigorous methodologies needed to project our path over the next decade. In addition to transmission and distribution networks, our analysis reviewed the whole electrification sector, including transmission and distribution networks, renewables, EVs, heat, housing and data centres. By developing cross-sector competency mapping, standardised equipment aggregation and predictive workforce requirements modelling, we have built a data-led foundation that provides unprecedented, 10-year visibility across equipment, skills and economic value capture. We have further committed to providing a rolling 10-year view through publication of an annual update.

To turn these analytical insights into real-world impact, our sector must tackle two overarching priorities: creating the right environment for UK supply chain growth, and building a skilled, diverse workforce fit for tomorrow. Unlocking supply chain capability requires long-term visibility and confidence. By providing rolling ten-year demand forecasts, enabling earlier investment mechanisms and fostering long-term strategic partnerships between network operators and suppliers, we can give manufacturers the certainty they need to expand facilities, innovate and build domestic capacity. At the same time, we must address critical workforce challenges. With an estimated 128,000 job openings to fill over the next decade, including 6,000 new apprenticeships, we are committing to unified occupational standards, expanded entry routes for under-represented groups and fair, high-quality jobs for life that make our sector an industry of choice.

Realising this once-in-a-generation opportunity requires a level of industry-wide collaboration never seen before. To turn this ambition into reality, Energy Networks Association (ENA) and BEAMA will drive this work through a new Growth Partnership. Bringing together senior decision makers from network operators, supply chain partners, Government and Ofgem, the Growth Partnership will provide the enduring leadership, coordination and accountability needed to turn our 10-year roadmap into concrete action, monitor progress and remove barriers to sector expansion.

The expansion of Great Britain's electricity networks is a defining economic opportunity. By leveraging robust decade-long projections and uniting through the Electricity Networks Growth Partnership, we can secure our energy future, rebuild our industrial base, and position the United Kingdom as a global leader in energy infrastructure for decades to come.



Cordi O'Hara
Co-Chair, Electricity Networks Sector Growth Plan
Executive President, UK, National Grid



Phil Dingle
Co-Chair, Electricity Networks Sector Growth Plan
Director of Future Networks, Lucy Electric





Foreword from Minister of State for Energy

Department for Energy Security & Net Zero



We have embarked on the largest build out of Britain's electricity network in a century – presenting a once-in-a-generation opportunity to reindustrialise our economy, secure our energy future, and drive growth in every postcode.

The scale of the grid upgrade is unparalleled and matched by significant investment through consumer bills. At a time when affordability is the government's number one priority, this investment must deliver for people across the country. There is therefore a significant responsibility to achieve positive outcomes for those who are paying for it.

The Prime Minister has made reindustrialisation central to this government's vision for the UK. That means creating good jobs, developing skills and apprenticeships, and thinking differently about how procurement happens to create much more local investment.

Our electricity network sits at the heart of that ambition. As this Plan demonstrates, investment in the grid to grow our economy over the coming decade can support more than 210,000 high-quality jobs and add £58 billion to our economy, directly supporting UK manufacturers, workers and communities in every region.

I welcome industry's commitments through this Plan to maximise the benefits of networks to our economy, led by a new Electricity Networks Sector Growth Partnership with clear accountability for delivery and achieving the agreed outcomes. Key commitments to demonstrate how consumers are supporting local supply chains, improving the visibility of future demand for suppliers, and building competitive UK supply chains are important steps. This will be underpinned by closer collaboration on workforce and skills – to attract and train the people the sector needs whilst ensuring it offers good, secure careers to those from every background.

Government will continue to play its part by providing a supportive environment for the growth of the sector, working closely with wider public bodies, including Ofgem and Great British Energy, to support delivery of the Plan.

This work shows what is possible when the sector comes together with shared purpose and vision. I want to thank everyone across the Energy Networks Association, BEAMA, network companies, manufacturers, the wider supply chain, skills bodies and trade unions who have contributed, and recognise the collaborative spirit that has underpinned this work.

This Plan provides a shared vision and commitment; the Growth Partnership must now deliver on them. If we seize the opportunity, we will not only build the network Britain needs but also strengthen our industrial capability, support good jobs and lay the foundations for growth across the country.

Michael Shanks MP
Minister of State for Energy
Department for Energy Security and Net Zero

Forewords from Lawrence Slade and Yselkla Farmer

Network operators are working hard to deliver a once in a generation transformation of the grid, enabling the connection of clean, secure and affordable energy across the UK. Importantly, this is not just about new infrastructure. Maintaining and renewing our existing network is a major priority, ensuring we build on our standard of 99.9% reliability. Delivering on this scale requires genuine collaboration. Our Sector Growth Plan outlines how this transformation will bring real benefits to communities around the country, supporting 120,000 high-quality jobs across manufacturing, engineering, construction and operation. To make this happen, we need a strong, expanding supply chain. That is why we are delighted to partner with BEAMA on this initiative, supported by Ofgem and the Government. By giving our supply chain clear demand visibility and the confidence to invest for the long term, we can build the capacity needed to connect data centres, renewables, transport, heat and housing at pace. We look forward to collaborating with BEAMA, regulators and Ministers to deliver a grid that serves the UK for generations to come.

Lawrence Slade
Chief Execuvite, Energy Networks Association



We're proud to be publishing this comprehensive growth plan, setting out the critical economic contribution of the UK supply chain and the actions needed to allow UK industry to thrive.

This is a huge moment for the electrical industry and a once-in-a-generation opportunity to bring investment and growth to the UK. This is a master class in collaboration, and I am immensely proud of the work we have done to produce this plan and what is to come as we deliver it. It is evidence that we can accelerate electrification and deliver economic and social value to the UK. We are starting from a position of strength with well-established manufacturing and service companies supplying electricity networks already employing people across the UK, providing good jobs rooted in local communities. We can grow our supply chain to create more of those good jobs, export, and ensure a sustained resilient supply chain. Manufacturers and service providers need visibility and confidence in demand to scale up their capacity – the commitments set out here will support our successful industries to grow further and I am confident this plan will benefit BEAMA's entire membership, ensuring we have a network that can facilitate growth and support growing markets for data centres, renewables, transport, heat and construction. We're looking forward to working with the ENA in an ambitious growth partnership to deliver these actions.

Yselkla Farmer
CEO, BEAMA.



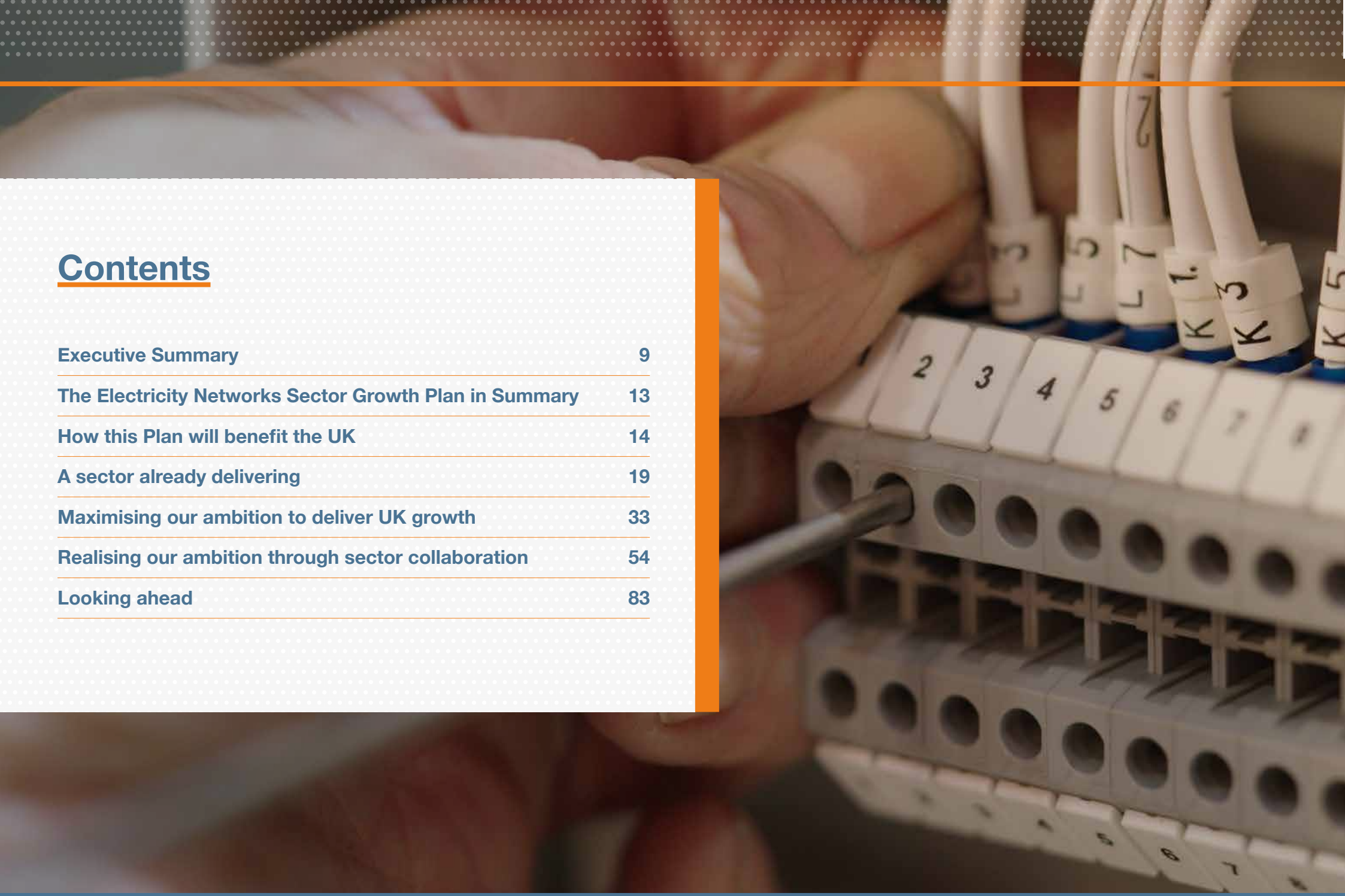
Foreword from Akshay Kaul



Realising the economic benefits of building a strong and resilient electricity network will require significant cross-sector cooperation and a strong drive to deliver. It is encouraging to see this cooperation already materialising in the creation of the Sector Growth Plan. Ofgem will continue to engage with the wider industry to help achieve the ambitions set out in the Sector Growth Plan and ensure that the consumer interest is carefully considered in each action. Through our Growth Duty, Ofgem is already playing its part in supporting the Great British economy by enabling infrastructure at low-cost, creating the conditions for investment and stimulating domestic supply chains skills and expertise. Our Advanced Procurement Mechanism and the Accelerated Strategic Transmission Investment framework have already helped improve demand visibility for the supply chain. We also acknowledged the importance of workforce and supply chain resilience in our RIIO-ED3 Sector Specific Methodology, setting out our approach to improving delivery confidence through clearer long-term planning, stronger market signals, and proportionate accountability. Our recent consultation on Guidance on Evidencing wider value in procurement decisions aims to empower companies to make procurement decisions that benefit the economy while keeping the costs as low as possible. The Sector Growth Plan identifies significant potential for growth. Achieving it will require continued commitment from all parties involved and a clear targeted plan for delivery. With the right partnerships and structure in place, the prize is firmly within reach.



Akshay Kaul
Director General for Infrastructure, Ofgem.



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Executive Summary

The electricity networks sector represents one of the UK's most powerful tools to help reindustrialise the country and rebalance the nation's economy.

Great Britain is undertaking the largest expansion of its electricity networks since the creation of the national grid in the 1920s, providing a once-in-a-generation economic growth opportunity.

Electrification is a core part of the plan for UK energy, supporting the transition for transport, heat, industry, and new sectors of the economy. Electricity networks are more than just infrastructure that move power from where it's generated to where it's needed. They are the foundations for the economy itself and an enabler of future prosperity and national renewal. As the UK's clean energy transition accelerates, society will rely ever more on electricity to power homes, businesses and industry.

Over the next decade, the sector will invest up to £200 billion[1] to maintain and expand the existing grid that is fit for the future. To deliver this, we will need to build on our successful, growing manufacturing and services industries. This will support more than 210,000[2] high-quality, long-term and well-paid jobs including in manufacturing products for networks, building new infrastructure, operating the larger networks, and providing services for the networks and across the wider supply chain, adding £58 billion in direct gross value added[3] (GVA) to the UK economy. Our ambition is to capture up to 72% of the economic value[4] from this network investment through UK manufacturing and service delivery.

Critically the jobs and economic benefits created will not be confined to one part of the country. They will be spread across every region. Investment will generate skilled jobs for local people within their own communities while increasing the resilience of the vital domestic manufacturing and supply chains that underpin the sector to grow.

About this plan

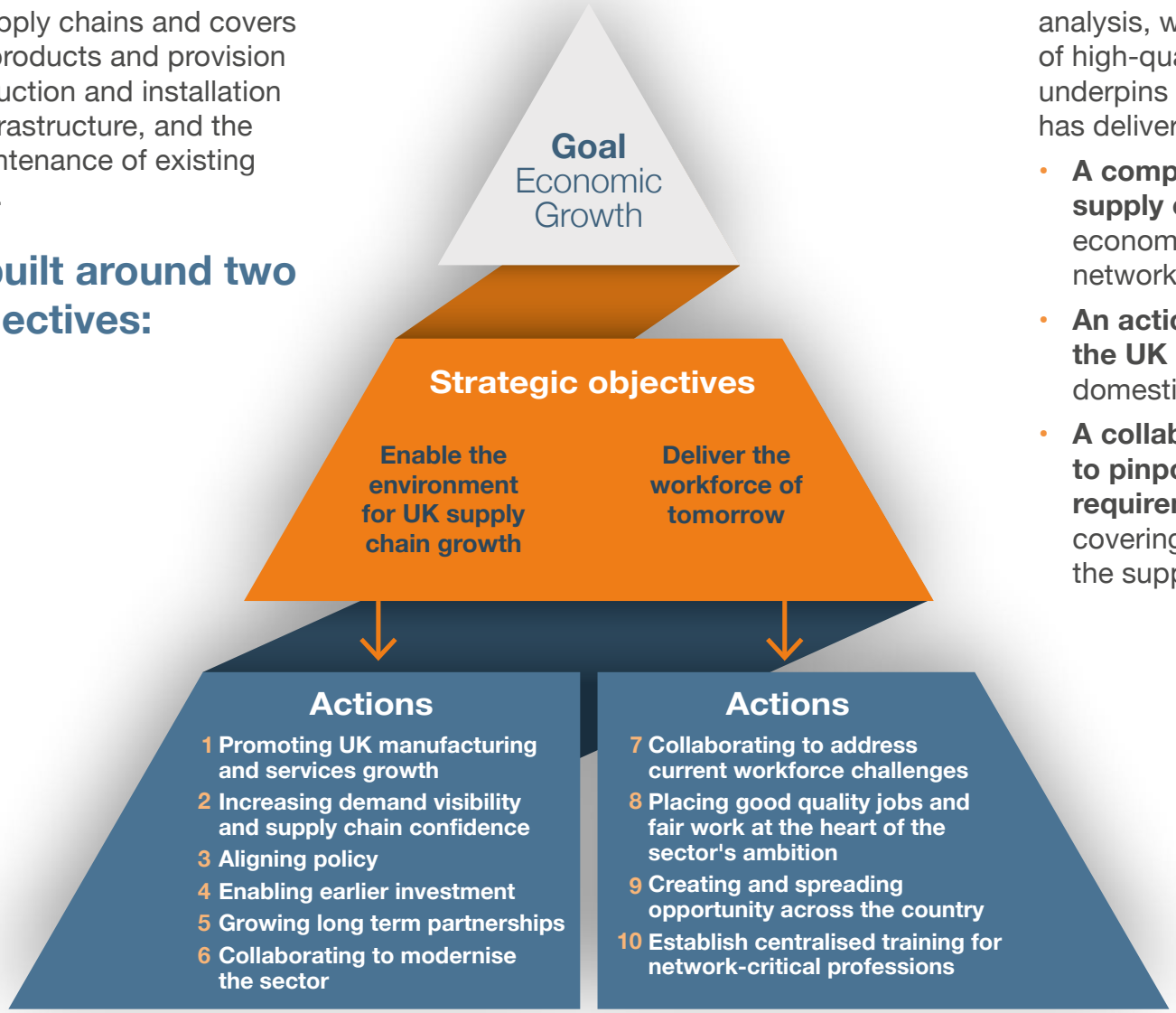
The Electricity Networks Sector Growth Plan has been developed jointly by the Energy Networks Association (ENA) and BEAMA members, with support from the UK, Scottish and Welsh governments, Ofgem, NESO, Great British Energy, Independent DNOs, the British Cables Association, RenewableUK and the Offshore Wind Industry Council (OWIC). The aim is to maximise this generational opportunity by setting out a 10-year plan out to 2035, and one that provides a coherent roadmap to meet the Government's commitment to achieve Net Zero by 2050.

The Sector Growth Plan details, for the first time, how the UK can deliver clean, secure and affordable power while anchoring skilled jobs, stronger supply chains and industrial renewal across the UK for decades to come. The objective is to maximise the economic benefits generated by the growth of the electricity networks, support UK manufacturers and service providers to grow, and deliver good jobs across the country to enable the delivery of a modern, efficient electricity network.

1 See the associated Economics report for detail of investment, value flowing through the UK economy, and GVA. The estimates of investment in this report are predicated on reasonable assumptions, including agreement on ED3 allowances and future RIIO agreements. The Economics report sets out these assumptions.
2 Unless stated otherwise, the jobs figures in this report include direct and indirect jobs (those in electricity networks and the extended supply chain). Further detail is available in the appendix of the associated Economics report.
3 The GVA figures in this report include only the direct effects. Indirect GVA is excluded.
4 In the associated Economics report, we set out four scenarios. In the Additional Growth scenario, where new UK capabilities are developed by new manufacturing capacity and inward investment, 72% of the expenditure in networks can be captured by UK-based businesses.

The scope of this plan includes the transmission and distribution networks along with their supply chains and covers manufacturing of products and provision of services, construction and installation of new network infrastructure, and the operation and maintenance of existing and new networks.

The plan is built around two strategic objectives:



In developing the Sector Growth Plan, we have conducted intensive sector-wide analysis, which has provided a rich source of high-quality data and evidence that underpins our recommendations. This work has delivered:

- **A comprehensive economic and supply chain analysis** to quantify the economic opportunity stemming from network investment.
- **An action plan to support growth of the UK supply chain** and to strengthen domestic manufacturing capability.
- **A collaborative work programme to pinpoint the workforce and skills requirements for the whole sector,** covering transmission, distribution and the supply chain.

£181bn
investment in Great Britain's electricity networks by 2035

£58bn
GVA for the UK economy by 2035

Up to £130bn
value flowing through the UK economy from investment in networks by 2035

210,000
jobs supported in 2035

128,000
job openings by 2035

What is the prize?

The benefits of following the Growth Plan are clear:

Economic opportunity felt in every community

Through to 2035, electricity networks can play a key role in re-industrialising UK regions and creating 128,000[5] high-quality, well-paid job openings distributed across every region. Ensuring a greater domestic share of network and supply chain investment will also enable greater resilience against international volatility, while increasing the regional benefits.

Energy security and resilience

Investment in electricity networks is fundamental to strengthening Britain's energy security, enabling the UK's pathway to a more resilient and long-term, low-cost future by connecting large volumes of clean, homegrown energy supplies from offshore wind, onshore wind, solar, nuclear, hydroelectric, battery storage and other emerging clean technologies.

Affordability

Investing now in networks is the best way to ensure long-term savings in customer bills. This plan sets out actions to remove blockers and ensure that consumer benefits are realised in every part of the country.

Broader economic opportunities

While this plan focuses on the electricity networks sector, the economic opportunities extend across sectors.

Networks and their supply chains are critical to the development of the wider electrification market, including renewable generation, EV infrastructure, housing, data centres and rail. These sectors create additional demand for equipment, construction, engineering, digital services and skilled labour. Timely delivery of network capacity therefore underpins growth and good jobs across the wider economy.

The infrastructure supporting these sectors is often delivered outside the regulated electricity networks – it is therefore critical to understand the demand for products and services from non-regulated customers and the economic opportunity from serving these sectors.

5 In the scenario where UK manufacturing and service providers maintain the current share of value, around 210,000 direct and indirect jobs will be supported by the sector, with around 128,000 job openings created by 2035. Further detail on the ranges around these values can be found in the associated economics and workforce and skills reports.

How we will deliver

Maximising the benefits of the Sector Growth Plan depends on sustained collaboration between network operators, manufacturers and the supply chain, Government, Ofgem, and Great British Energy (GBE).

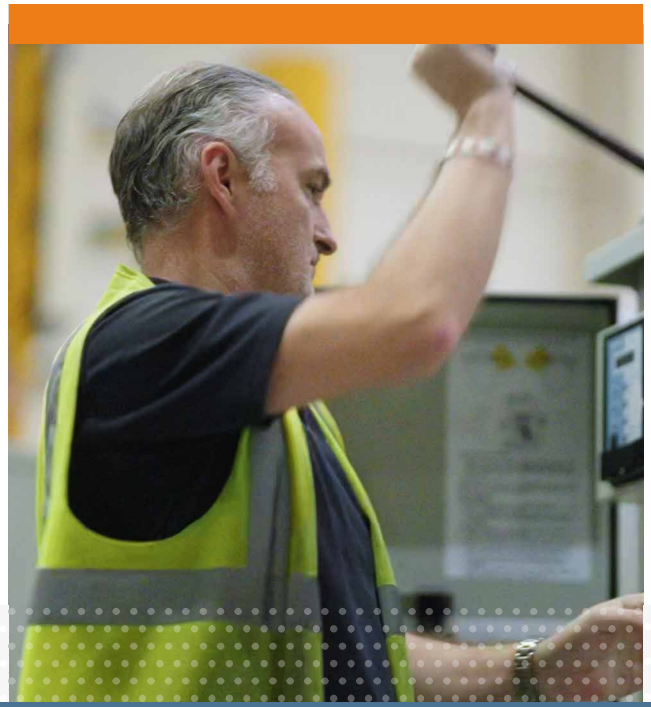
To deliver on this opportunity, we are proposing a new Electricity Networks Growth Partnership to provide the leadership, coordination, accountability and transparency to ensure growth is delivered fairly across all regions and communities.

The Partnership will provide an enduring mechanism for delivery rather than a one-off programme of work. It will monitor progress, identify emerging challenges and opportunities, and refresh the Sector Growth Plan over time in line with evolving policy, investment and delivery priorities. The Partnership's overarching aim will be to ensure that the UK maximises the economic contribution from electricity network investment, grows a resilient UK manufacturing and services sector, creates good jobs, and delivers lasting benefits for consumers, communities, businesses and the wider economy.

Looking ahead

The expansion of Great Britain's electricity networks is a defining economic opportunity.

By delivering on this plan, industry, together with the UK, Scottish, and Welsh Governments, and Ofgem, can seize this opportunity. Success will mean more skilled jobs, stronger energy security, a growing and resilient manufacturing sector, and greater investment across the economy. This will position the United Kingdom as a global leader in electricity networks for decades to come.



Vision for 2035

Great Britain is undertaking the largest expansion of its electricity networks since the creation of the national grid, whilst maintaining our existing infrastructure to ensure the high reliability continues, providing a once-in-a-generation economic growth opportunity.

Our Vision for 2035 is grounded in the research and analysis undertaken for the Electricity Networks Sector Growth Plan, including a robust assessment of future network investment, supply chains, workforce, economic impact and policy conditions.

By 2035, electricity networks will be a key component of our national renewal: re-industrialising UK regions, driving £58 billion GVA contribution to the UK economy and supporting more than 210,000 high-quality, well-paid jobs. This growth will create opportunity in every postcode area. Our ambition is for up to 72 pence in every pound invested in electricity networks to flow through the UK economy by increasing the products and services procured from UK-based companies.

The Electricity Networks Sector Growth Plan in summary

A once-in-a-generation economic, skills and workforce opportunity

x2

electricity demand is set to more than double by 2050.

£181bn

of investment in networks through to 2035.

72p

up to 72p of every £1 spent to flow through UK communities via manufacturing, jobs and services.

£58bn

gross value added (GVA) contribution to the UK economy.

210,000

More than 210,000 jobs the sector could support across Great Britain by 2035.

128,000

the total number of people the sector will need to attract recruit and retain through to 2035.

6,000

new apprenticeships by 2035 for direct workforce.



How this Plan will benefit the UK

Economic Opportunity felt in every community

By 2035, electricity networks can re-industrialise UK regions and support more than 210,000 high-quality, well-paid jobs with job openings in every region.

Electricity network investment is not simply about energy infrastructure, it's a national growth programme that creates jobs, attracts investment, unlocks housing and supports economic development across every nation and region.

By 2035, we will see:

- £181bn of investment in the regulated networks, building new network capacity at an unprecedented rate and renewing ageing infrastructure, ensuring the electricity networks remain fit for purpose.
- Up to 72p of every £1 invested circulating in UK communities through manufacturing and jobs to build, maintain and operate a growing network.
- All UK regions benefit from economic activity, averaging at more than £10bn of value flowing through local economies in every UK region.
- High-quality, long-term, well-paid jobs across the UK, supported by a strong pipeline of talent and skills development. These are long-term careers that directly support economic growth, improve social mobility and create a larger, more diverse and more productive workforce for the future. This includes the creation of around 6,000 apprenticeships for direct[6] roles.
- The sector additionally opens export opportunities to a $21 trillion (£15 trillion) global market by 2050.

6 Direct roles are those in network operators and their immediate suppliers (supply chain). Indirect roles include those in the extended supply chain – i.e. Tier 2 plus suppliers.

Supporting wider electrification across the economy

Investment in electricity networks is essential to unlocking the economic benefits of transport and heating electrification.

Investment in electricity networks enables the timely and reliable connections needed for electric vehicles, heat pumps and wider electrification across the economy. By reducing connection constraints, networks help support economic growth, increase productivity and enable the expansion of associated manufacturing and supply chains.

- Electricity networks provide the capacity needed to support the rollout of electric vehicles, heat pumps and other low-carbon technologies.
- EV charging demand could increase by around **64 TWh by 2035**, requiring significant network reinforcement and new connections.
- The EV charging sector can deliver **£15.5 billion in direct value to the economy by 2035** and act as the foundation for the £385 billion economic opportunity of wider transport electrification.
- Residential heat pump demand could reach around **16 TWh by 2035,** making timely network access critical to deployment.
- Heat pump deployment could support higher household disposable incomes, add around **£0.3bn of annual GDP,** and increase employment across the economy.

Electricity networks are not only energy infrastructure but a key enabler of decarbonisation, investment and economic growth across multiple sectors.

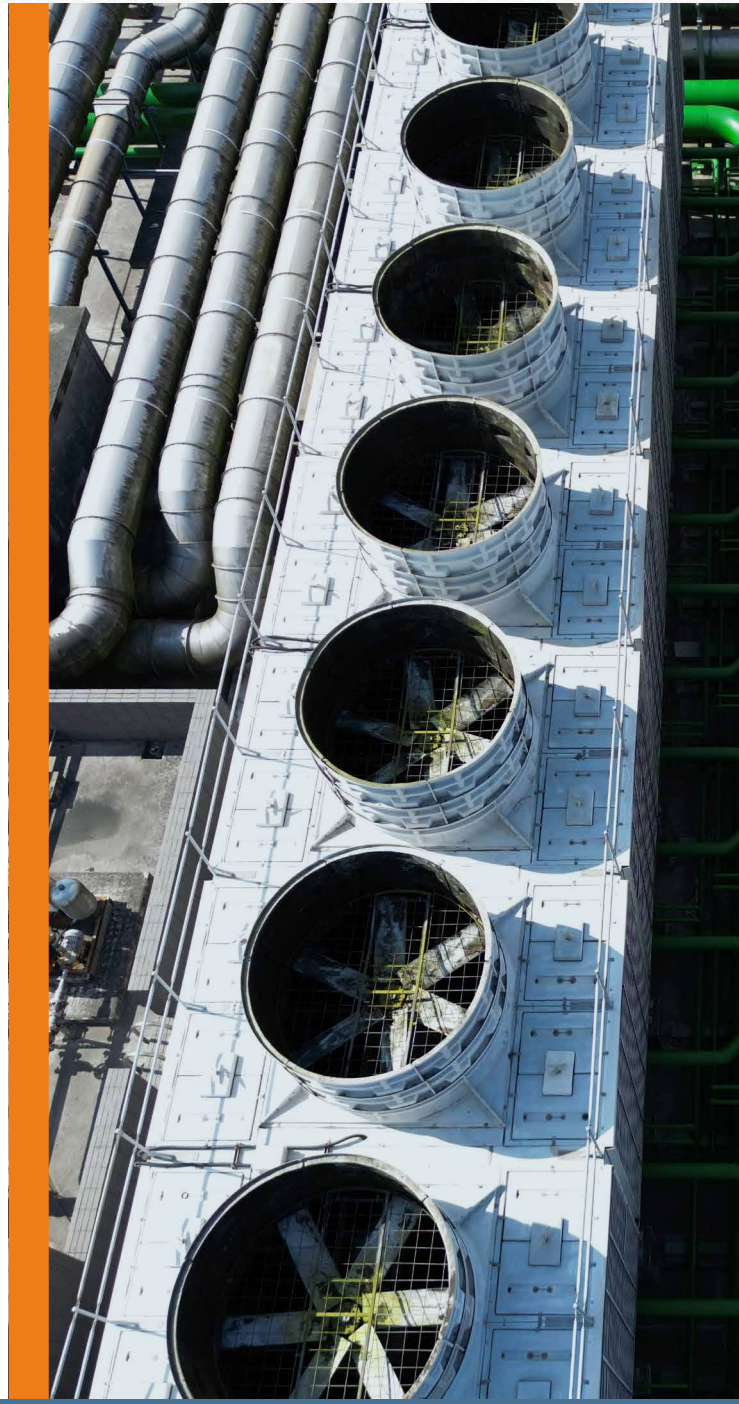


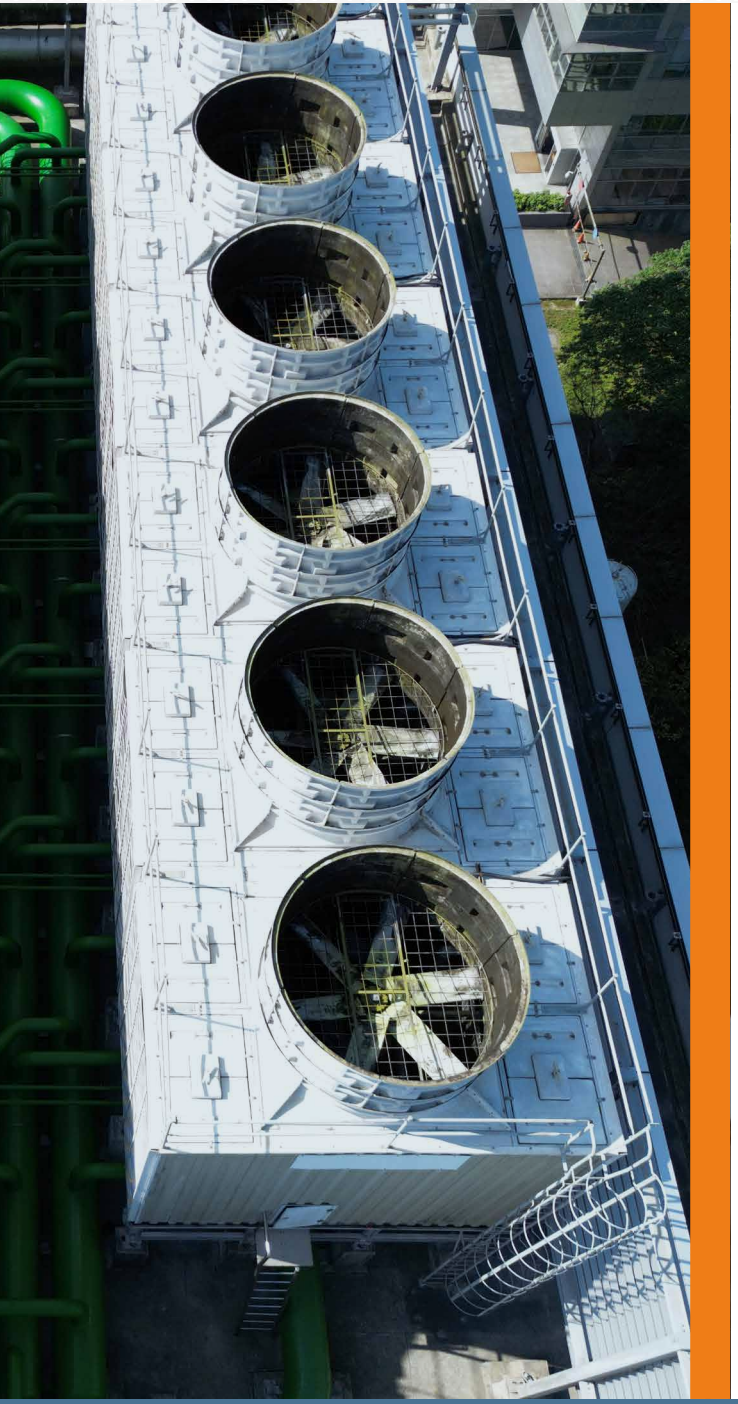
Foundational support to the economy

Timely grid connections are critical to unlocking investment and economic growth.

Electricity networks enable businesses to secure the power they need to invest, expand and innovate. Faster and more reliable grid connections support growth across the priority sectors in the UK's Modern Industrial Strategy, from advanced manufacturing and clean energy to AI data centres and digital infrastructure.

- Timely electricity connections can enable investment, influence business location decisions and enhance economic growth.
- The UK's Modern Industrial Strategy identifies faster grid connections and lower electricity costs as key enablers of growth across its priority sectors.
- On current trajectories, these priority sectors could contribute an **additional £152bn of annual GVA** and support **1.1 million additional jobs by 2035.**
- Electricity network investment supports industrial electrification, helping manufacturers and industrial clusters transition to more electricity-intensive production processes.
- Growing electricity demand from data centres will require substantial network capacity, with total demand projected to reach around **37 TWh by 2035.**
- Data centres could directly support around **40,000 operational jobs by 2035** and provide critical infrastructure for AI, financial services and wider digital economic activity.





Energy Security & Resilience

Ensuring a greater UK share of network and supply chain investment will enable greater resilience against international volatility.

Investment in electricity networks is fundamental to strengthening Britain's energy security, reducing exposure to global shocks and ensuring critical infrastructure can be delivered when needed.

- Great Britain's electricity networks already achieve 99.99% reliability. However, much of the infrastructure is ageing and investment is required to maintain and renew the equipment to continue to achieve this world-leading reliability.
- Networks are the critical infrastructure that connect offshore wind, onshore wind, solar, nuclear, hydroelectric, battery storage and emerging clean technologies.
- Global competition for critical components, manufacturing capacity and skilled labour is increasing.
- Stronger domestic supply chains reduce exposure to international disruption and improve confidence that infrastructure can be delivered when required.
- Network investment is repeatedly linked to delivering clean power while strengthening national resilience and energy independence.
- Energy security is no longer just about where power is generated; it is about having the networks, supply chains and skilled workforce needed to deliver it.
- Stronger domestic capability reduces exposure to global supply chain disruption and provides confidence that critical infrastructure can be delivered when required.

Affordability

Investing now in networks is the best way to ensure long-term savings in customer bills.

Investing early in networks lowers overall system costs, speeding up clean power deployment and connecting people to more local sources of electricity.

- Accelerating strategic network upgrades can unlock substantial system savings, with NESO estimating around £6bn of annual constraint cost reductions by 2030. These savings are expected to significantly offset network investment costs, limiting the net impact on consumers to around 0.5p/kWh.
- Earlier and more efficient network delivery minimises whole-system costs and provides better long-term value for consumers.
- Stronger and more innovative supply chains improve productivity and lower infrastructure delivery costs.
- Electricity networks help connect more renewable generation and reduce exposure to volatile international gas prices.
- Innovation, digitalisation and improved productivity are expected to reduce future infrastructure costs.



A sector already delivering

Electricity networks are the foundation of the UK economy. They connect homes, businesses and communities to reliable power and enable the deployment of renewable generation, energy storage, electric vehicles, heat pumps, data centres and emerging technologies. As the clean energy transition accelerates, society will become ever more reliant on electricity. Networks will therefore play an increasingly important role in supporting economic growth, strengthening energy security and boosting the UK's international competitiveness.

Investment will extend beyond the regulated electricity networks. Growth in sectors such as renewable generation, EV infrastructure, housing, data centres and rail will all require additional electricity infrastructure to support their expansion.



What are networks

Great Britain's electricity networks are divided into transmission and distribution.

Transmission networks are like motorways for electricity. They carry large volumes of power over long distances, just like high-speed roads connecting cities.

Distribution networks are like the dual carriageways and B-roads that connect communities. They take electricity from the transmission lines and bring it to homes and businesses. Some generation is connected to the distribution networks and most demand is connected via distribution networks. These lines make sure power gets to where it's needed locally.

The scale of change required over the coming decades is unprecedented. Between 2025 and 2035, Great Britain's electricity networks will need to support domestic generation output increasing from 263 TWh to 564 TWh, while renewable generation capacity connected to the electricity system is expected to grow from 54 GW to 186 GW.

By 2035, electricity networks are expected to support the connection of an additional:

46GW

of offshore wind (two and a half times current levels).

22GW

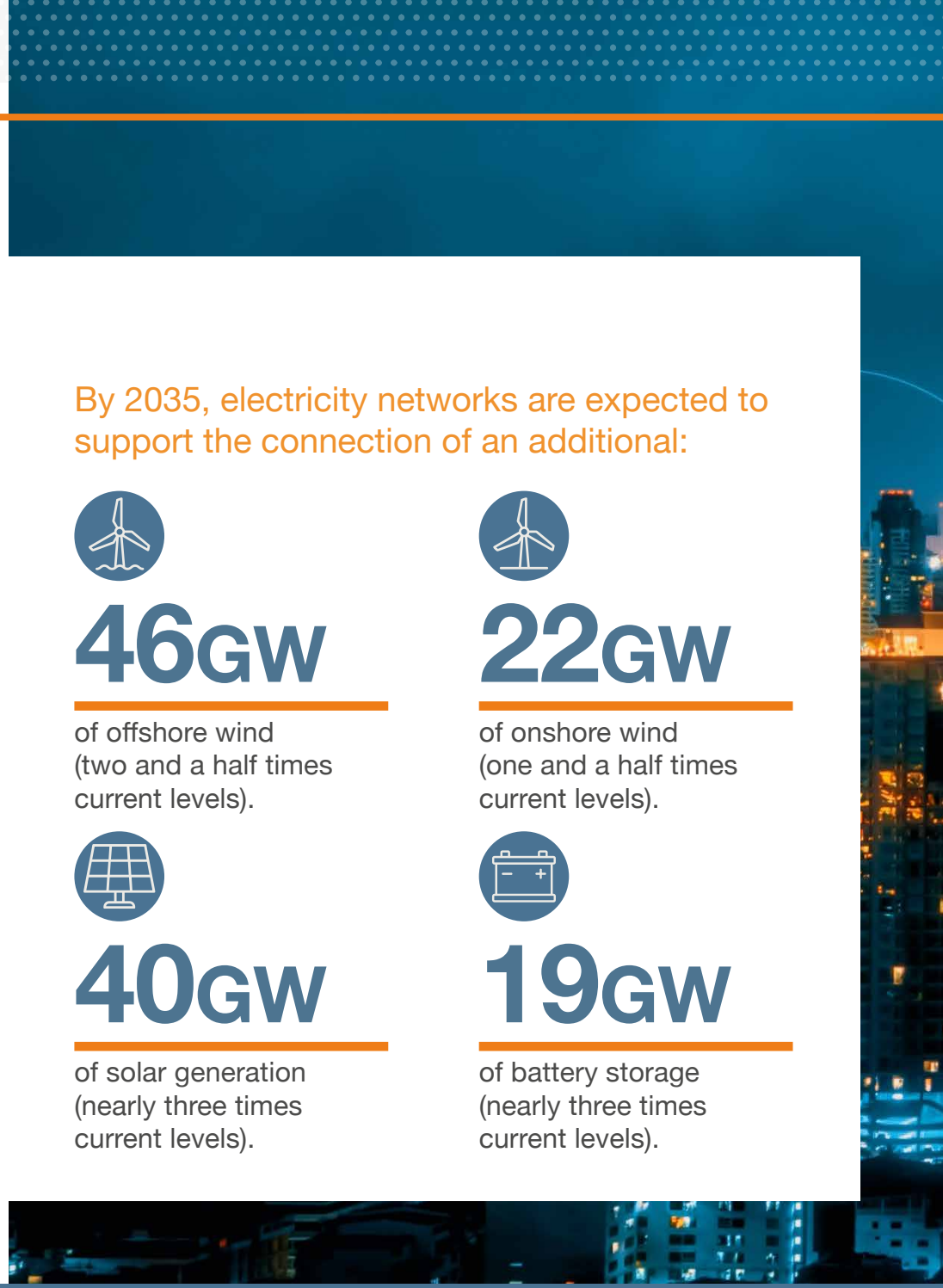
of onshore wind (one and a half times current levels).

40GW

of solar generation (nearly three times current levels).

19GW

of battery storage (nearly three times current levels).





Electricity demand is expected to double by 2050. The emergence of new industries and the electrification of transport, heat and industry mean that by 2035, electricity networks are expected to support:

More than
2.3mn
new homes

Around
1,800
new EV charging hubs across Great Britain

30 TWh
of additional demand from data centres

64 TWh
of additional demand from electric vehicles

24 TWh
of additional demand from residential and I&C heat pumps

23 TWh
of additional industrial demand

Delivering this transformation will require one of the most ambitious infrastructure programmes ever undertaken in the UK.

Around 80 major transmission projects must be delivered by 2030, alongside significant reinforcement and expansion of distribution networks across England, Scotland and Wales.

The sector is building a new electricity network at a scale not seen since the original national grid was constructed around 100 years ago.

This is not simply an infrastructure challenge. It is one of the UK's most significant economic opportunities.

Beyond building new network infrastructure here in the UK, countries worldwide are accelerating their own network investments. The UK has an opportunity to not only strengthen the domestic supply chain, but to develop intellectual property, grow exports, support other nations' energy transitions, and compete in expanding international markets.

The UK starts from a position of strength. Great Britain's electricity networks are among the most reliable in the world and have a long track record of engineering excellence, innovation and efficient delivery. Significant progress has already been made to accelerate investment, develop long-term strategic partnerships, and strengthen supply chain confidence.



Case study:

Powering Economic Growth: Aligning network investment with Greater Manchester's growth locations

SP Electricity North West's (SP ENW) place-based partnership with Greater Manchester Combined Authority (GMCA) is enabling the delivery of Greater Manchester's ambitious growth agenda, supporting plans for tens of thousands of new homes and jobs across its 10 boroughs.

In 2025, GMCA launched a 10-year strategy and integrated pipeline of growth and regeneration projects across six Growth Locations, designed to attract £10 billion of investment and supported by a £630 million integrated devolved funding settlement.

As a strategic infrastructure partner, SP ENW sits on the Greater Manchester's Strategic Infrastructure Board and works closely with the GMCA and local partners to align electricity network investment with these growth priorities. Through its Manchester Development Plan, SP ENW adopts an integrated and growth-led approach to network planning, ensuring electricity infrastructure is delivered where it is needed to support housing, commercial development and economic growth.



> ***SP ENW is a strategic infrastructure partner for the GMCA and our 10 local authorities, working proactively with us to unlock economic growth. By aligning network investment with Greater Manchester's Growth Locations, we collaborate to ensure electricity capacity is delivered ahead of need, supporting housing, commercial development and driving forward Greater Manchester's low carbon ambitions.***
>
> Peter Emery,
> Chair, Greater Manchester
> Strategic Infrastructure Board.

Constructing major network infrastructure at scale

Network operators are already delivering record levels of investment to future proof the grid.

The new regulatory period for Transmission is under way, with TOs investing a total of ~£76bn out to 2031. This is the largest increase in capital spend in the history of the privatised electricity transmission sector. ED3 plans are currently in development with DNOs expecting to invest several tens of billions of pounds in the distribution network between 2028 and 2033 and beyond. The construction and installation workforce will double by 2035 to deliver this scale of activity.

Across the sector, businesses are investing in manufacturing capability, workforce development and innovation to support future delivery.

These investments are supporting thousands of jobs, strengthening UK supply chains and providing businesses with greater visibility to invest in skills, facilities and capability. But there is more work to be done to maximise the opportunity.

Transmission

RIIO-T3 (T3) is Ofgem's regulatory price control framework for Great Britain's electricity and gas transmission networks covering the period from 1 April 2026 to 31 March 2031. It sets the revenues that network companies can earn and the outputs they must deliver in return, maintaining secure and resilient energy supplies, providing high-quality customer service, and delivering long-term value for consumers.

T3 will support significant investment in network infrastructure needed to connect new low-carbon generation, accommodate rising electricity demand, and enhance system reliability. It will also ensure that investment is cost-effective and that customers receive measurable benefits from network spending.

Compared with earlier RIIO frameworks, T3 places a much stronger emphasis on enabling the energy transition at pace while balancing affordability for consumers.

The TOs have made considerable supply chain investments to date:

- National Grid Electricity Transmission has established supply chain contracts that will deliver more than £28 billion of its forward capital plans in the UK. Strategic partnerships - including The Great Grid Partnership and Electricity Transmission Partnership give suppliers the confidence to invest, grow capability and support the delivery of critical national infrastructure.
- SPEN will spend up to £12bn over the T3 period and has placed £5.4bn of contracts with 19 strategic partners, 17 of them UK-based, 6 of them Scottish, to support T3 delivery.
- SSEN Transmission will spend up to £19bn in the UK over the T3 period, including up to £8bn locally across our network area, and £5bn across the rest of Scotland.

Case study:

Longer term visibility brings mutual benefits: SSEN Transmission's HVDC Framework Agreement with Hitachi Energy

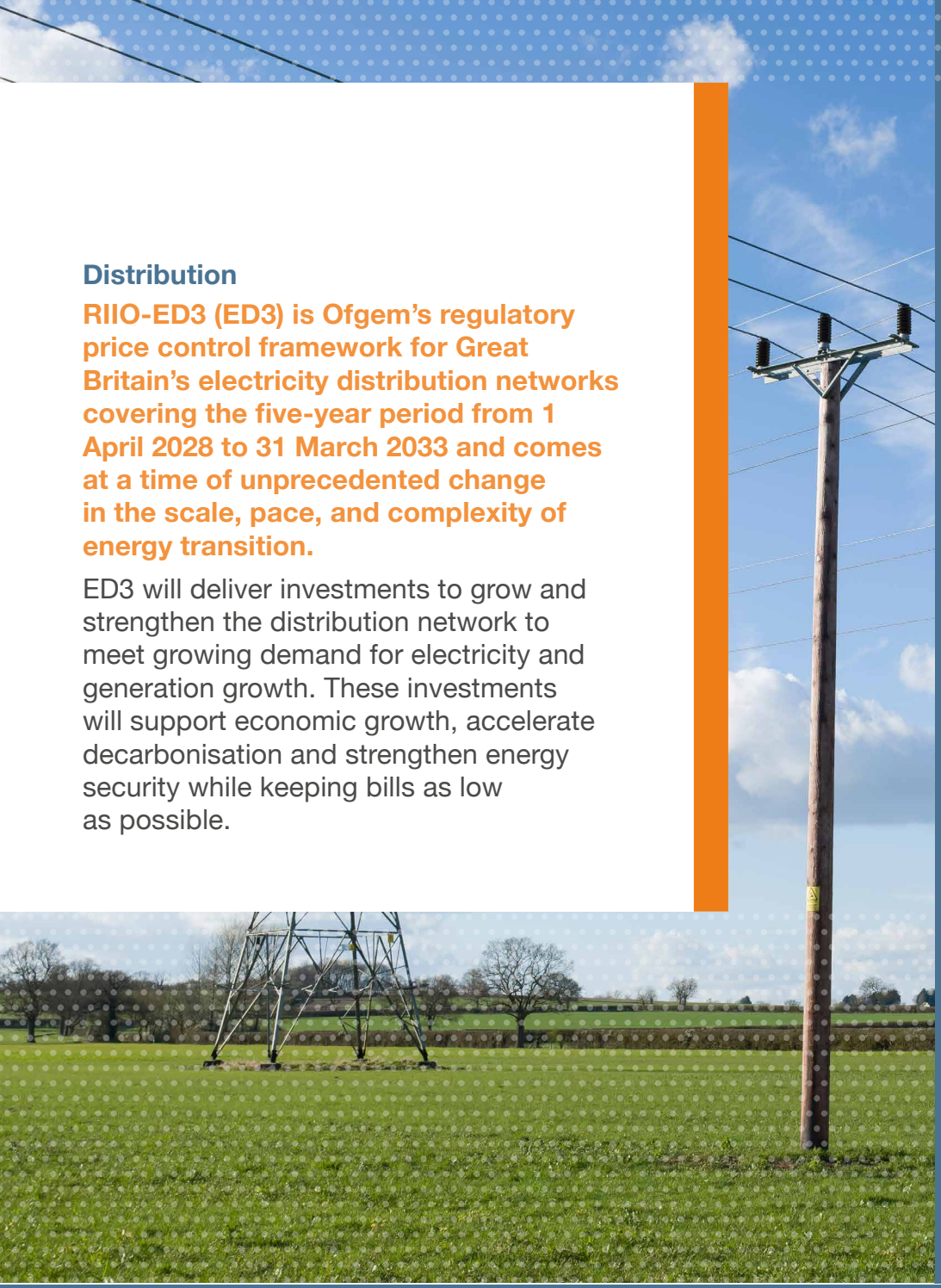
In 2023, SSEN Transmission appointed Hitachi Energy to a landmark multi-project framework agreement to supply onshore High Voltage Direct Current (HVDC) converter stations across Scotland, supporting the acceleration of the UK's energy transition.
The framework covers up to five HVDC transmission "superhighways", each capable of transmitting up to 2 GW at 525 kV, enabling renewable electricity generated in northern Scotland to be transported efficiently to centres of demand further south.

Collectively, the projects could facilitate the transfer of up to 10 GW of renewable energy, equivalent to the electricity needs of around 10 million homes. The agreement builds on a long-standing partnership between the two organisations and provides SSEN with access to Hitachi Energy's HVDC technology, engineering expertise and project delivery capabilities, giving greater certainty to strategic grid reinforcement projects.

In return Hitachi Energy has long term visibility of the project pipeline allowing more efficient long-term planning of resources and production capacity. The partnership demonstrates how strategic procurement and long-term supplier collaboration can accelerate and optimise the delivery of nationally significant energy infrastructure.

The broader partnership approach is also delivering flagship projects Eastern Green Link 2 (EGL2) and Eastern Green Link 3 (EGL3), joint ventures between SSEN Transmission and National Grid. The projects will connect Scotland and England via high-capacity subsea HVDC connections to transport large volumes of electricity, representing some of the largest transmission investments in the UK.

Together, these projects are reducing network constraints, enabling greater integration of offshore wind generation, and creating the modern electricity infrastructure required to deliver the UK's clean energy ambitions.



Distribution

RIIO-ED3 (ED3) is Ofgem's regulatory price control framework for Great Britain's electricity distribution networks covering the five-year period from 1 April 2028 to 31 March 2033 and comes at a time of unprecedented change in the scale, pace, and complexity of energy transition.

ED3 will deliver investments to grow and strengthen the distribution network to meet growing demand for electricity and generation growth. These investments will support economic growth, accelerate decarbonisation and strengthen energy security while keeping bills as low as possible.

Case study:

BRUSH Group grows UK manufacturing capacity in response to distribution demand

Ongoing investment in distribution networks is supporting BRUSH Group, a supplier of power transformers and switchgear, with spend of more than £150 million over the past five years. This is enabling BRUSH to accelerate its growth plans by expanding its product portfolio, increasing UK recruitment and investing in its manufacturing facilities.

Recent multi-million-pound investment into a high-voltage transformer test cell has seen the firm increase capacity at its UK facility from 12 to 48 132 kV units per year, while creating additional capability for 33 kV and 66 kV type testing. Since 2021, BRUSH has created skilled roles across production and office functions and supported around 60 apprentices starting careers in engineering. Alongside this growth, the company continues to bring new innovations to market, helping to shape the future of the energy network.

Strengthening regional workforces and economies

Delivering the grid of the future requires a broad ecosystem of companies spanning construction, engineering, services and specialist expertise, working together to design, build and operate the network.

The supply chain for transmission and distribution networks spans the whole of the UK, from major industrial hubs to local communities. This nationwide footprint supports regional growth, strengthens local economies and helps to build the workforce needed to deliver the network for decades to come.

The industry will need to attract, recruit, train and retain an estimated 71,000 people to fill direct roles by 2035, and all regions will benefit from new jobs in the sector. The regions expected to experience the greatest relative demand compared to the size of their current workforces are North Scotland, South Scotland, and Southern England.

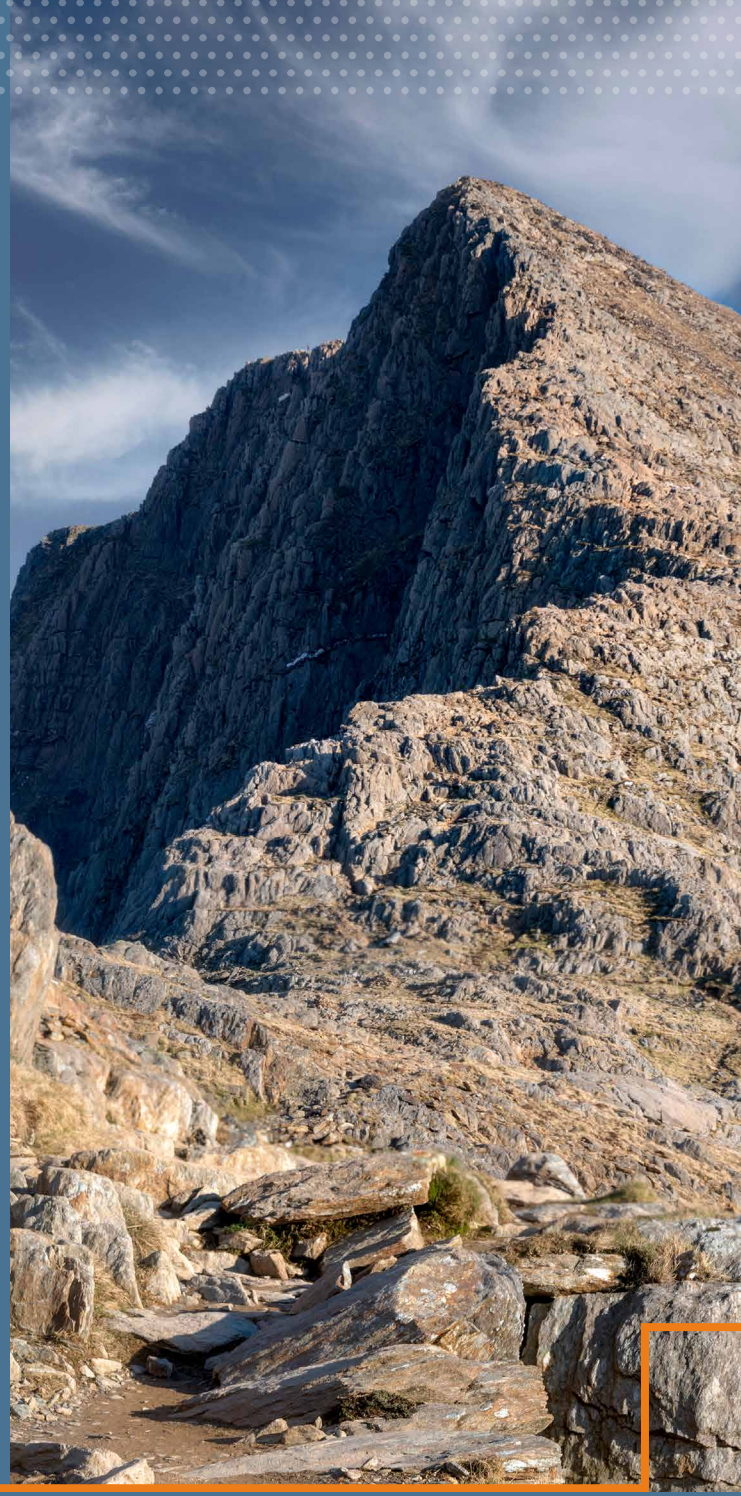


Case study:

North East Wales Industrial Decarbonisation (NEWID) demonstrates the value of collaboration in reducing emissions

Achieving the UK's statutory Net Zero target by 2050 will mean that industrial and commercial demand will account for approximately one third of total UK energy consumption. The North East Wales Industrial Decarbonisation (NEWID) project was awarded £1m in funding for the development of a credible Net Zero industrial decarbonisation and GHG emissions reduction plan for North East Wales.

This was developed using a whole energy system approach supported by both regional electricity and gas network operators that identified Flintshire and Wrexham as hosting the majority of key emitting sites in the region. NEWID has helped anticipate future industrial electricity demand and has informed anticipatory investment in transmission and distribution networks. It also provides clarity on how to meet Net Zero targets efficiently and cost effectively. Building on the success of NEWID, SPEN has secured funding for the Net Zero Industrial Pathways (NZIP) project to model decarbonisation pathways for the entire SPEN licence area.

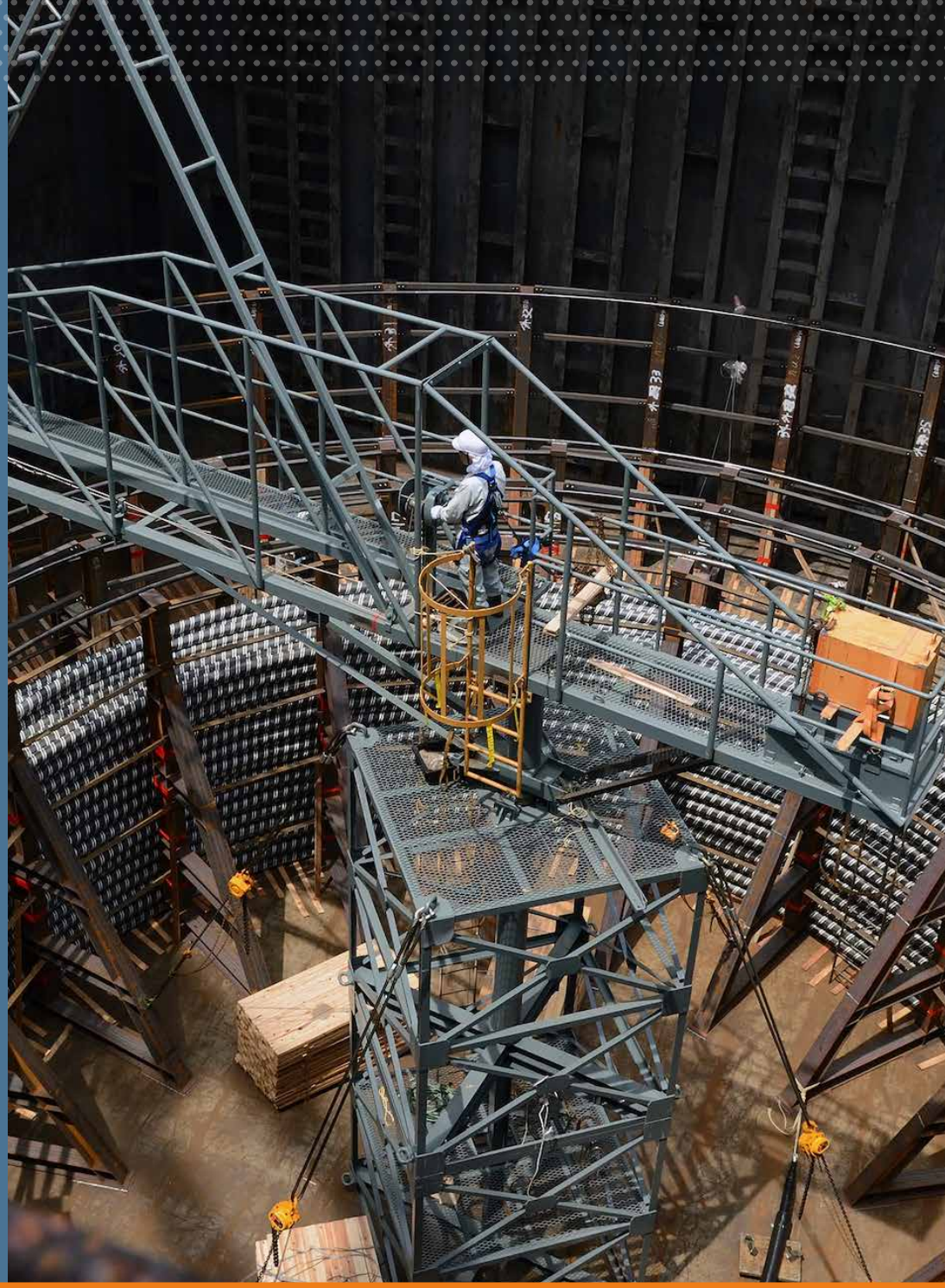


Case study:

Benefits of an aggregated electrification market: Sumitomo Electric

In 2023, Sumitomo Electric Industries announced a c.£350 million investment to build a state-of-the-art new HVDC/HVAC cable manufacturing facility at the Port of Nigg in Scotland. The facility is underpinned by SSEN Transmission's proposed second HVDC link between Shetland and mainland Scotland, with Sumitomo Electric supplying and installing 525kV HVDC subsea and onshore cable for National Grid's Sea Link project to reinforce the electricity transmission network between Suffolk and Kent. The factory will also support the Offshore Wind industry, evidencing the benefits of an aggregated electrification market.

The manufacturing facility will support around 250 direct jobs and over 400 estimated across the UK supply chain, creating significant economic opportunities for the Highlands, Scotland and the UK. This marks the first time that 525kV HVDC transmission cables will be manufactured in the UK, strengthening domestic industrial capability and further supporting key local supply chains.



Building the workforce required for the energy transition

Today, the transmission and distribution electricity networks and associated supply chains directly support 23,000 jobs in manufacturing, 18,000 roles in construction and installation, and a further 49,000 positions involved in operating and maintaining the networks. Significant recruitment will be needed in all areas, with construction and installation roles doubling by 2035.

The sector has made significant progress in strengthening its workforce and skills pipeline. Network companies and their supply chains already invest heavily in apprenticeships, graduate programmes and workforce development. Meanwhile, industry-led initiatives such as Destination Energy are helping to raise awareness of careers in the sector and attract new entrants.

Targeted specialist workforce programmes have also been developed, such as armed forces partnerships, women returners programmes and breaking barriers programmes. Since 2022, electricity network operators and their supply chains have worked collectively to improve workforce resilience, introducing common workforce metrics and increasing collaboration on skills planning, recruitment and training. This provides a strong foundation on which to scale workforce development with world-class capabilities and skills, while ensuring the sector can meet future demand for skilled workers.





Case study:

UK Power Networks is building the skilled, diverse workforce needed to deliver Britain's low-carbon transition across London, the East and South East.

Apprenticeships are central to its workforce strategy. The Platinum Investors in People employer currently has around 300 apprentices across 22 study programmes and has invested more than £8 million in apprenticeships this year, strengthening skills, widening opportunity and supporting social mobility.

The company's craft apprentices outperform national averages for achievement, retention and pass rates, supported by paid training, expert mentoring and clear routes into permanent careers. Between 2020 and 2025, 96% of apprentices moved into full-time roles with UK Power Networks, while 21% were promoted within three years of qualifying.

UK Power Networks is also opening up new routes into the sector. Its Craft Attendant programme is designed for people with no previous electricity industry experience, equipping candidates with the qualifications needed to progress into roles such as cable jointer, overhead linesperson or electrical fitter.

One example is Erin Gibson from Kent, who is training as an overhead linesperson. She said: "I don't like office jobs — I'd rather be doing something active. It's good to do a role where I'm helping the community and, if I can do it, others can too."

Case study:

Bringing industry together to tackle the skills challenge

As Great Britain embarks on the largest expansion of its electricity network in a generation, the availability of skilled workers is a critical enabler of delivery. Recognising that workforce challenges could not be solved by any one organisation alone, National Grid established the Electricity Transmission Industry Skills & Workforce Planning Programme, bringing together the three TOs, Energy & Utility Skills and supply chain partners in the first coordinated industry-wide approach to workforce planning and skills development for the transmission sector.

The programme has enabled the industry to move beyond individual organisational initiatives and develop a shared understanding of workforce needs, critical skills gaps and future priorities. The programme also established an Innovative Ways of Working workstream, which brought together network operators, suppliers and industry experts to develop a white paper identifying opportunities to improve productivity, make better use of scarce skills and strengthen collaboration across the sector.

Importantly, the National Grid led initiative has now provided the foundation for the Workforce & Skills workstream within the Electricity Networks Sector Growth Plan, enabling the sector to translate existing analysis, industry consensus and collaborative activity into a set of actionable priorities for future delivery.





Maximising our ambition to deliver UK growth

South of Scotland
£6.8bn direct GVA
25,600 direct & indirect jobs

North Western
£3.6bn direct GVA
14,100 direct & indirect jobs

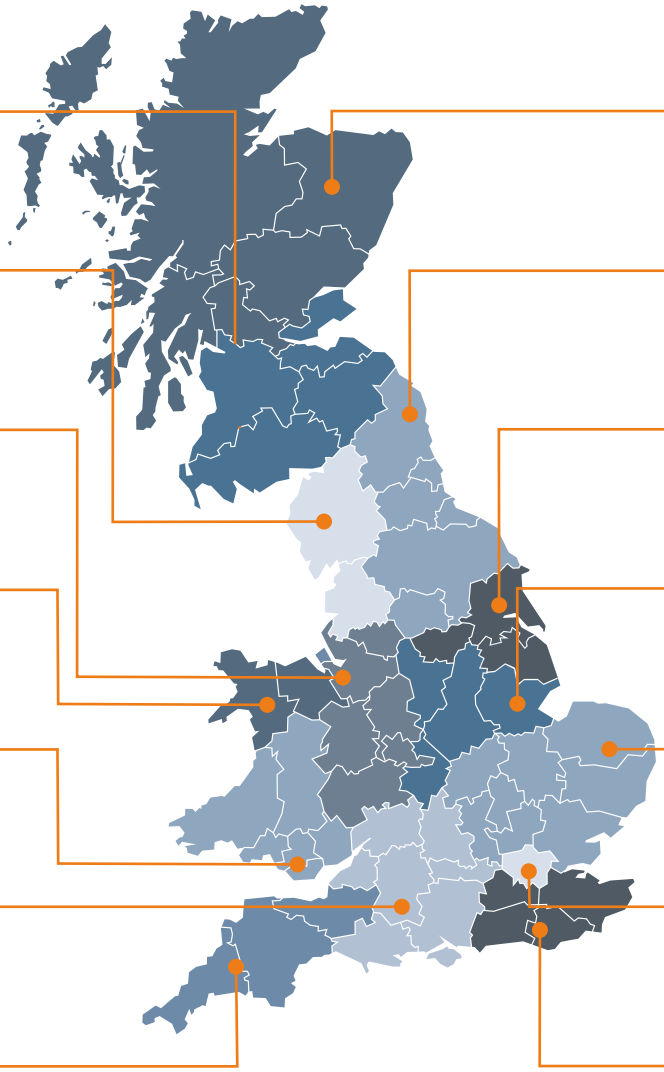
West Midlands
£4.9bn direct GVA
17,600 direct & indirect jobs

Merseyside and North Wales
£2.4bn direct GVA
9,650 direct & indirect jobs

South Wales
£1.8bn direct GVA
7,000 direct & indirect jobs

Southern
£3.4bn direct GVA
11,250 direct & indirect jobs

South Western
£3.8bn direct GVA
15,800 direct & indirect jobs



North of Scotland
£9.7bn direct GVA
22,500 direct & indirect jobs

Northern
£2.4bn direct GVA
9,950 direct & indirect jobs

Yorkshire
£3.1bn direct GVA
11,450 direct & indirect jobs

East Midlands
£4.6bn direct GVA
23,300 direct & indirect jobs

Eastern
£4.7bn direct GVA
16,600 direct & indirect jobs

London
£2.8bn direct GVA
12,650 direct & indirect jobs

South Eastern
£3.9bn direct GVA
16,650 direct & indirect jobs

Supporting re-industrialisation, delivering regional benefits

Through to 2035, electricity networks can play an important enabling role in re-industrialising UK regions and support 210,000 high-quality, well-paid jobs, and an average of 10,000 job openings per region.

The transformation of Great Britain's electricity networks represents a significant opportunity to strengthen domestic industrial capability and support economic growth across every nation and region of the UK. By providing long-term investment certainty and creating stronger demand signals, network investment can stimulate manufacturing, engineering, construction and specialist services, helping businesses expand capacity, attract inward investment and create high-quality jobs.

The benefits extend beyond infrastructure delivery itself, enabling regional supply chains, supporting SMEs, retaining skilled talent in local communities and ensuring that the economic value created through network investment is more widely distributed. By building on existing UK strengths and growing capability in strategically important sectors, network investment can act as a catalyst for re-industrialisation while delivering lasting regional prosperity and resilience.

Over the next nine years the sector will deliver £181bn of investment - nearly twice the amount invested since privatisation - and up to 72p of every £1 spent is expected to circulate through UK communities via manufacturing, jobs and services. By 2035 this investment programme will deliver broad regional uplift. The Electricity Networks Sector Growth Plan estimates that £58bn of GVA will be added to local economies as project activity and supplier opportunities scale up.

This growth will deliver long-term, well-paid career opportunities across all parts of the UK. A strengthened talent pipeline—including 6,000 apprenticeships and targeted support for those not in education, employment or training (NEETs) and career-switchers—will expand skills, improve social mobility and create a larger, more diverse and productive workforce to build, operate and maintain the network for decades to come.

Stronger domestic manufacturing and supply chains will amplify these benefits and create international opportunity. The sector's scale and capability boost regional industrial capacity and resilience, while expanding export markets to create a global opportunity. Together, these shifts deliver tangible regional economic impact, sustained job creation and renewed manufacturing strength across Great Britain.

Case study:

Siemens Energy UK grid jobs have doubled in four years

The growing pipeline of electricity network projects has already enabled Siemens Energy to double the number of direct jobs in its UK substation and grid connections teams in the last four years, creating nearly 400 additional well-paid jobs in engineering, project delivery, site construction, and associated roles. Included in this are 120 apprentices and graduates who now make up 9% of Siemens Energy's Grid Technologies workforce.

In addition, Siemens Energy has brought substation control panel manufacturing back to the UK, investing £2m in its factory in Newcastle upon Tyne and creating 60 new roles, including a first cohort of 4 new apprentices this year.

It has also invested over £5m on the creation of multiple HVDC labs in a purpose-built facility in Manchester, which now employs more than 70 skilled engineers.



Strengthening energy security and resilience against international price volatility

Investment in Great Britain's electricity networks is fundamental to strengthening long-term energy security and resilience. Ensuring a greater UK share of network and supply chain investment can play an important role in supporting these goals.

While recognising that strengthening domestic manufacturing and supply chain capability is not the only driver of resilience, it will deliver important benefits. Building domestic capability in strategically important areas while retaining access to diverse global suppliers will improve delivery resilience and provide a firmer foundation for economic growth, clean power and energy independence, while increasing confidence that critical infrastructure can be delivered at the required pace.

Electricity networks connect offshore and onshore wind, solar, nuclear, hydroelectric, battery storage and other emerging clean technologies and already achieve exceptionally high reliability (99.99%). Investment is therefore central not only to delivering clean power but to national resilience: energy security now depends not only on where generation is located, but also on having the networks, supply chains and skill labour in place to build and operate infrastructure.

With global competition for components, manufacturing capacity and skilled labour intensifying, reinforcing domestic supply chains will help ensure projects are delivered on time and the UK can meet its future network needs.





Accelerating long-term reduction of customer bills

Investing now in networks is the best way to ensure long-term savings in customer bills. This plan sets out actions to remove blockers and ensure that consumer benefits are realised across every region and in every postcode.

Early investment lowers whole-system costs by speeding up clean-power deployment and connecting people to more local, lower-cost sources of electricity. Strengthening supply-chain resilience, delivery capacity and workforce capability reduces delays, eases equipment constraints and improves productivity across the network build programme. That in turn supports earlier connection of renewables, cuts system inefficiencies and reduces costs from congestion and delivery bottlenecks.

Accelerating strategic network upgrades can unlock substantial system savings, with NESO estimating around **£6bn of annual constraint cost reductions by 2030.** These savings are expected to significantly offset network investment costs, **limiting the net impact on consumers to around 0.5p/kWh.** Continued investment in digitalisation, modular construction and process improvements will further raise productivity and drive down the unit cost of delivering network assets and connections.

Networks also enable cheaper, cleaner generation by bringing more renewables online and reducing exposure to volatile international gas prices. Realising these savings depends on aligned procurement, multi-year pipeline visibility and regulatory approaches that reward outcomes - earlier delivery, competition and transparency - while protecting customer value.

Case study:

Schneider Electric’s Digital infrastructure improving network performance:

Schneider Electric's EcoStruxure Grid solutions demonstrate how intelligent substations, connected assets and advanced analytics can improve network performance, reduce outage risks and optimise asset utilisation. As electricity demand grows, digital infrastructure will be increasingly important in enabling networks to deliver greater capacity, resilience and efficiency without relying solely on physical reinforcement.



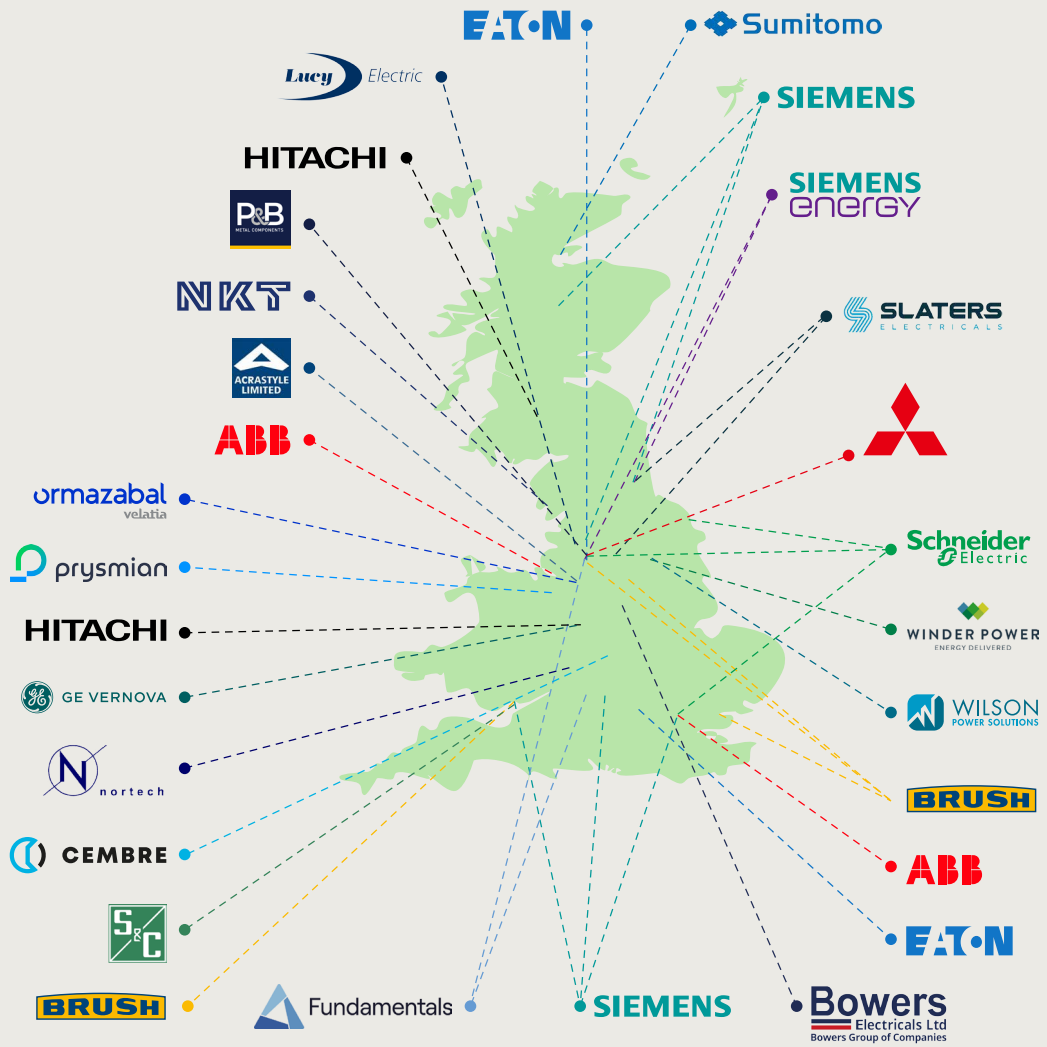
Identifying supply chain growth priorities

The current supply chain landscape

The UK has a strong networks supply chain, supplying manufacturing and services to both the regulated transmission and distribution networks and to non-regulated customers supporting sectors such as renewables, transport infrastructure, housing developments and data centres. It represents a broad and diverse network of suppliers and delivery partners, supplying to a mature and well-established customer base.

The electricity networks' supply chain combines a mature domestic ecosystem with internationally integrated manufacturing and delivery capabilities. These strengths provide a strong foundation for delivering future network infrastructure while creating opportunities to capture greater economic value from the transition to a low-carbon energy system.

The UK benefits from important domestic manufacturing capability in key parts of the supply chain – including manufacturing, assembly, testing and refurbishment capabilities across several asset classes, such as transformers, switchgear, cables, substations, protection and control equipment and low-voltage equipment. Up to 40% of some asset classes are manufactured domestically. UK facilities also undertake key customisation, integration and configuration activities that are essential for meeting project-specific requirements.



A large proportion of the activities required to build, connect and maintain electricity networks are also delivered by UK-based organisations and workers. A significant domestic contribution to the electricity networks supply chain is found in value-add activities such as engineering design, project management, systems integration, testing, commissioning, maintenance, refurbishment and network operations. These often represent a significant share of the value created during project delivery.

The UK also has a strong platform for innovation and future growth, actively developing and deploying new technologies that will modernise the network and allow more efficient delivery – helping to reduce the cost of building and operating the network. As networks become more digital, this is likely to become an even more important source of competitive advantage for the UK.

The UK's combination of engineering expertise, delivery capability, innovation and selected manufacturing strengths provides a strong platform for future growth, with significant opportunities to increase economic value.

Access to a growing market

The supply chain also benefits from access to a growing market in both the regulated and non-regulated sectors. Demand from regulated electricity network operators is set to rise substantially between now and 2050 at both transmission and distribution voltages, across a wide range of asset classes.

The non-regulated market will also grow substantially, creating parallel demand and greater capacity for the same components, manufacturing capacity and skills. Non-regulated demand is a substantial part of the market – by 2050, the non-regulated market is expected to add 23% to transformer demand, 49% to high voltage conductor demand, and 37% to low voltage conductor demand.

This is particularly important at distribution voltages, driven by demand growth from housing, EV charging, data centres and wider electrification. There will also be impacts at transmission voltages, with offshore wind deployment representing a large and structurally important source of demand for constrained HVDC systems.

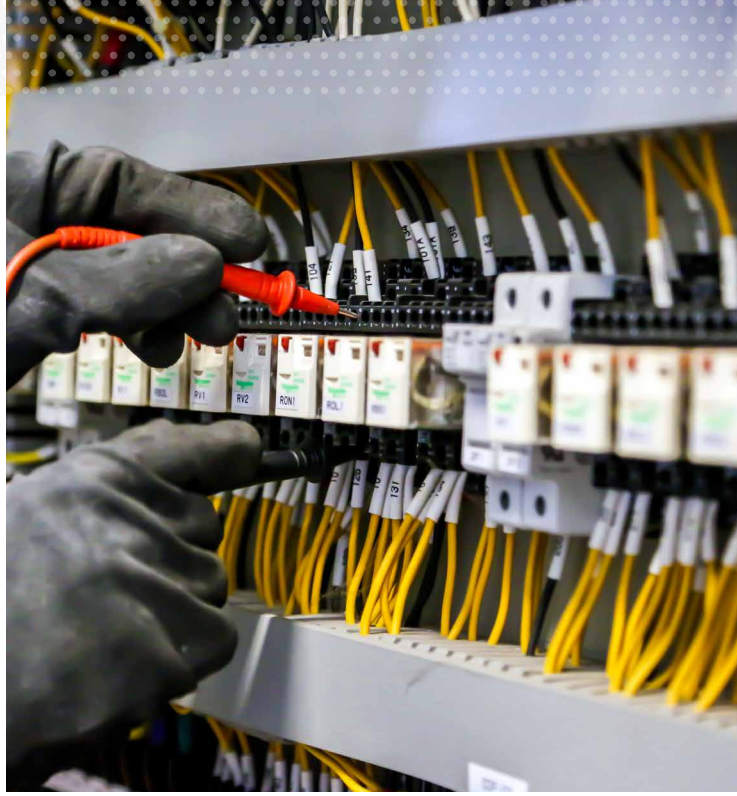
Non-regulated customers will therefore be critical for making investment cases for capacity and workforce expansion. Suppliers need to form a view of the combined scale of requirements across both regulated and non-regulated sectors, with a risk of exacerbating bottlenecks if signals are not coordinated across the sector. Greater visibility and earlier contractual commitment will also be required from regulated networks to secure supply chain capacity in a more competitive market.

Constraints to delivery

Increases in demand are already creating pressure across the supply chain. At transmission level, constraints are linked to long lead times for globally sourced, high-value assets such as transformers, switchgear, HVDC systems and complex cable systems. Manufacturing is concentrated among a limited number of global suppliers and delivery times have lengthened as regulated network investment competes with offshore wind deployment and broader electrification for the same production capacity.

The supply chain is less constrained for distribution networks, although constraints do exist. Operators report growing pressure on selected assets such as transformers, switchgear and wood poles, alongside increasing competition for specialist delivery resources. Workforce availability is a particular challenge across the sector, particularly for roles requiring lengthy training and authorisation, with the ability to design, install and commission infrastructure becoming as important as access to equipment itself.

Growing capacity takes time, and therefore it is critical to act before constraints emerge. A 2025 BEAMA survey found that most manufacturers would need at least two years to deliver a 50% increase in capacity, with some needing five years or more. Even where new physical facilities are not required, the time required to train and authorise employees for roles constrains the speed at which the sector can grow. In some specialist areas such as high-voltage engineering and commissioning, new entrants can require seven or more years to become fully competent. This makes increasing long-term visibility and confidence over demand especially critical to ensure capacity is in place when it is needed.





Making the investment case for expansion

LCP Delta's assessment of investment readiness finds that the electricity network value chain is fundamentally attractive, with a strong level of underlying investment readiness.

This applies across the sector, with strong ratings for network operators, manufacturers and service providers, at both transmission and distribution voltages.

However, two key constraints can create hesitation for supply chain investments that require long lead times and multi-decade investment horizons.

- **Long-term investment confidence:** Stakeholders highlighted the importance of clear and consistent signals to support investment decisions across the supply chain. Key considerations include earlier procurement commitments, improved pipeline visibility, a coherent long-term electrification pathway, order confidence and commitment, incentives to site manufacturing in the UK to compete with other locations, and increased confidence in planning and connections processes.
- **Workforce availability:** Skills shortages, particularly in specialised engineering and construction roles, are widely identified as a constraint on delivery capacity often caused by training and competency lead-times for new entrants being longer than workbook visibility. This challenge is evident across manufacturing, service provision, and network operations, and reflects both training lead-times and competition for skills across the wider infrastructure sector.

In many cases, investments will look to expand on key areas of UK capability – particularly at distribution voltages. These are likely to be the key determinants for whether it is possible to make a successful investment case for expanding existing capacity.

In some cases, investments would be bringing new capabilities to the UK or driven by manufacturers that are multinational corporations with a global manufacturing base. In these cases, it is likely that the UK will effectively be competing against other markets to attract this investment. This means that it will not be enough alone to demonstrate a clear pipeline and an available workforce, though these remain critical factors – there will be greater significance on other factors such as available government support and key cost drivers such as energy costs.

The scale of the opportunity

Demand for equipment and services from regulated electricity networks is set to rise substantially to 2050, with growth visible across components and services at both transmission and distribution level.

The charts show the additional assets required to meet forecast changes in network load and connections, as well as replacement assets for those that have reached end of lifecycle.

Further detail of growth in other assets is provided in the associated Supply Chain report.

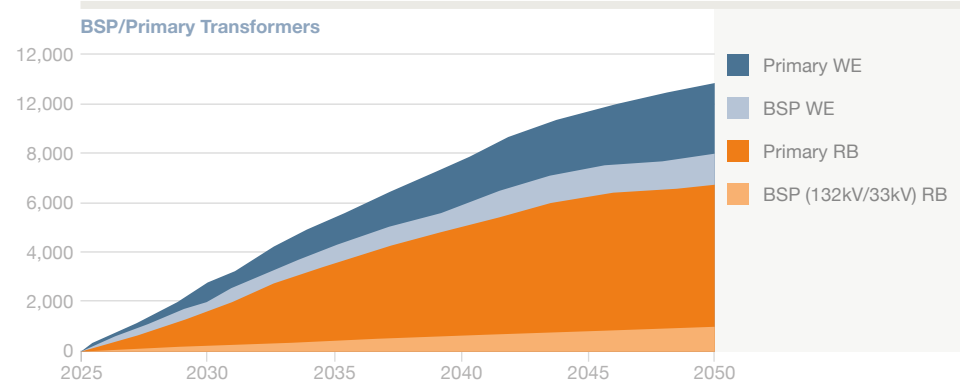


Figure 1: Bulk Supply Point (BSP)/ Primary Transformers, projected volumes for Regulated Businesses (RB) and Wider Electrification (WE) sectors 2025 – 2050

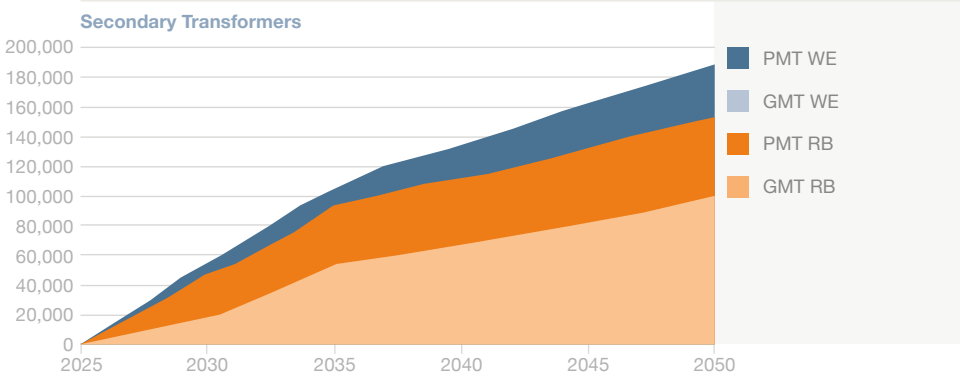


Figure 2: Secondary Transformers (Ground-Mounted and Pole-Mounted), projected volumes for Regulated Businesses (RB) and Wider Electrification (WE) sectors 2025 – 2050

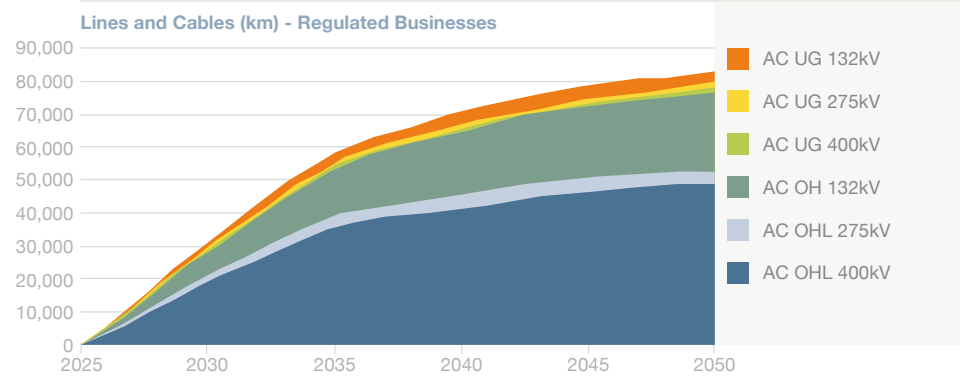


Figure 3: Lines and cables, projected kilometres for Regulated Businesses 2025 – 2050

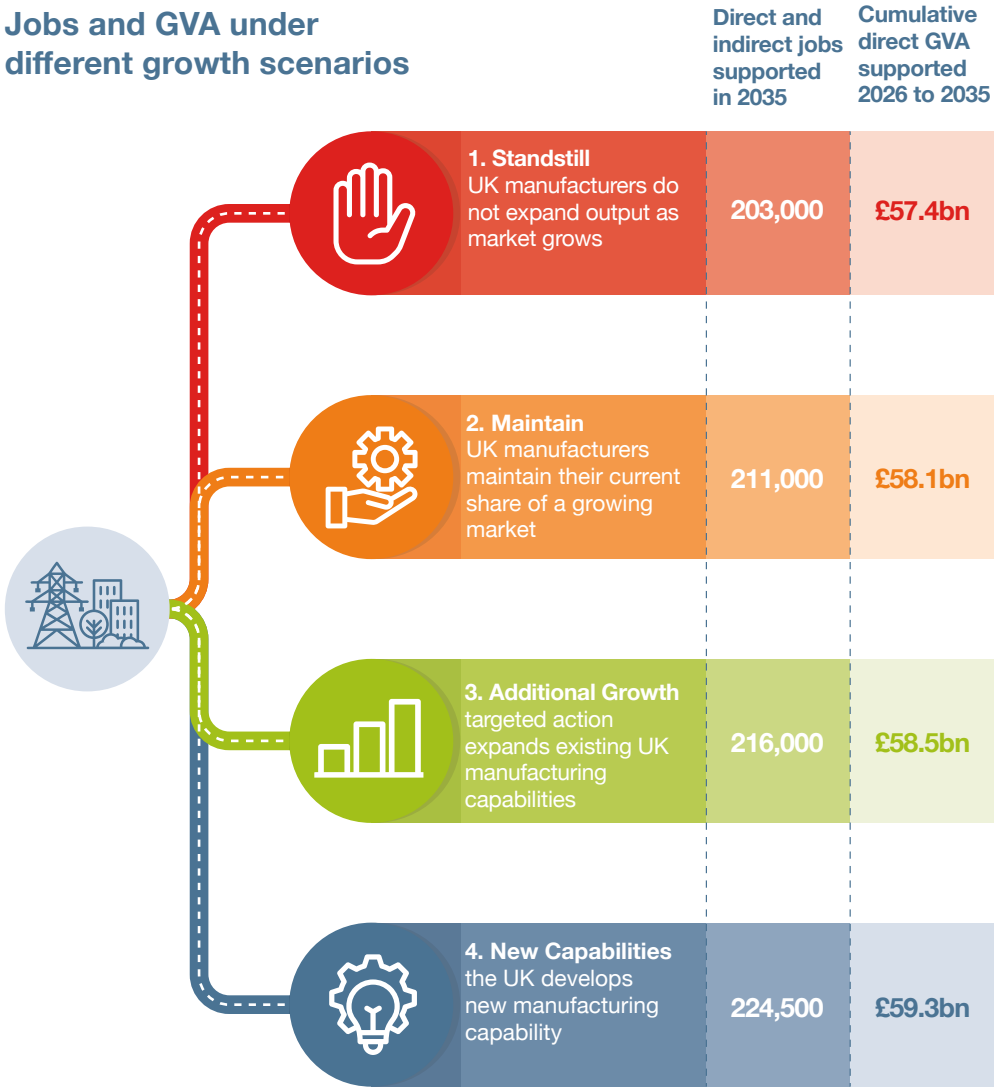
Due to the significant expected growth in both regulated and non-regulated networks demand, there is a significant economic opportunity if the UK supply chain can maintain or increase its market share of demand. If the UK supply chain fails to grow, this will imply a decreasing share of UK production and a significant missed economic opportunity.

Compared to a scenario where the UK manufacturing sector remains at its current size, maintaining current UK market share to support forecasted investment growth could support around 8,500 additional direct and indirect jobs in 2035 and around £680 million of additional cumulative direct GVA between 2026 and 2035.

Expanding existing UK manufacturing capability could support approximately 13,500 additional jobs and £1.06 billion of additional cumulative direct GVA, while developing new UK capabilities and attracting inward investment could support up to 22,000 additional jobs and around £1.85 billion of additional cumulative direct GVA.

In addition to the direct economic benefits of additional production in the UK, there are other benefits to the sector from greater local production. Local facilities and workforces support closer collaboration during project development, faster technical support, easier access to specialist expertise, and stronger long-term relationships throughout the asset lifecycle. This proximity can reduce delivery risk, improve responsiveness and help ensure that equipment is tailored to the needs of the UK network.

Jobs and GVA under different growth scenarios



Assessing supply chain opportunities: Make/Nurture/Buy/Protect

To maximise the benefit of the growth of the networks sector, it will be critical to focus attention on those key components and services where there are the biggest opportunities for UK growth.

The Make/Nurture/Buy/Protect analysis[7] was undertaken using a combination of stakeholder interviews, market research, supply chain data, and industry evidence to identify where targeted intervention could most effectively support electricity network delivery and economic growth. The assessment considered factors including projected market size and demand growth, existing UK manufacturing and service capabilities, supply chain constraints and supplier concentration, strategic importance to network resilience and delivery, and the potential for the UK to capture additional value through domestic capability expansion and export opportunities.

In classifying products and services as Make/Nurture/Buy/Protect, we identified two classes of products and services where intervention would deliver greatest benefit to the UK supply chain and Great Britain's electricity networks:

- Nurture-to-Make: where the conditions described above are met, where there is sufficient demand, an attractive investment case, but support is required to develop UK capability.
- Protect/Grow: similar to Nurture-to-Make, although UK capability does exist but demand visibility, competitiveness, or the investment case needs targeted support to maintain or grow share.

7 See the associated Workforce and Skills report for details.



CATEGORY	COMPONENT	MARKET GROWTH	UK SHARE OF VALUE	SUPPLY CHAIN CONSTRAINTS	STRATEGIC IMPORTANCE	EXPORT POTENTIAL	ASSESSMENT
HVDC Components	HVDC Converter Stations			C	C		
HVDC Components	HVDC Cable Onshore			C	C		
HVDC Components	HVDC Cable Offshore			HC	C		
Offshore Wind Transformers	GT/three-phase grid transformers		N/A	C	C		
Offshore Wind Transformers	SGT / single-phase grid transformers		N/A	C	C		
AC Substations	Transmission GIS Switchgear Bays			M	C		
AC Substations	Current transformers		N/A	L	M		
Overhead Line	Transmission overhead line conductor			C	S		
Overhead Line	Distribution overhead line conductor			C	M		
Overhead Line	Steel towers / pylons			C	M		
Overhead Line	Earth wires		N/A	L	M		
Underground Cable	HVAC Export cables offshore	N/A	N/A	C	C		
Underground Cable	Subsea array cables	N/A	N/A	M	M		
Underground Cable	Joint bay		N/A	C	M		
Reactive compensation devices	Series and Shunt Reactors			L	M		
Reactive compensation devices	FACTs devices (SCVs and STATCOMs)			C	S		
Bushings	LV Bushings			C	M		
Offshore Wind Reactive / Filtering	Filters		N/A	L	M		
Metals	Steel - Galvanised Sections & Flats, Steel - Mild Black	N/A	N/A	M	S		
Services	Specialist engineering			HC	S		
Services	Digital and Analytics			C	N/A		

N/A = Not Available

HC Highly constrained
C Constrained
M Medium
L Low

S Strategic
C Critical
M Monitor

Nurture to make
Protect/grow

See the associated Supply Chain report for a full assessment of the supply chain analysis.

Addressing critical workforce challenges

The current electricity networks workforce landscape

The electricity networks direct workforce in 2025 totals about 90,000 roles. The size of the workforce will need to grow by more than 30% over the next decade.

Our analysis shows that around 71,000 new entrants to the sector will be required including roughly 44,300 retirements and staff turnover, driving a projected workforce of about 117,000. Demand is concentrated in construction and installation, technical, engineering, digital and leadership occupations across network operators, manufacturers, contractors and the wider supply chain, with notable regional clusters in the North of England, the Midlands and Scotland.

The job creation opportunities are not limited to a single region – there will be a requirement to fill roles across the UK and at all skill levels. The scale of the workforce expansion means that now is the right moment to act – mapping all training facilities, expanding training capacity, ensuring common training standards and increasing public awareness of the wide range of career opportunities available in the electricity networks sector.

According to our sector analysis, the current workforce shows under-representation across certain groups[8], while there is limited public awareness of career opportunities in the sector. This is constraining the sector's ability to diversify amid strong competition for skilled labour.

Addressing these challenges requires a multi-layered approach. Training capacity must be scaled at pace, while clearer multi-year demand signals and more visible pathways into the sector are needed. Improvements in workforce representation depend on aligning recruitment, training and regional outreach at pace.

Competing for skills

The growth of electricity networks is taking place alongside significant investment across other sectors of the UK economy.

Construction, rail, offshore wind, nuclear, defence, advanced manufacturing and digital infrastructure are all seeking many of the same engineering, technical and project delivery skills required by electricity networks. The rapid growth of data centres, with developers seeking around 50 GW of new electricity connections, is creating additional demand for engineers, planners, project managers and technical specialists.

The average annual demand for skilled front-line operative, technician, engineering and specialist support skills across infrastructure construction related sectors is reported to be between 629,000 and 706,000 people over the next five years.

8 Additional information can be found in the associated Supply Chain report

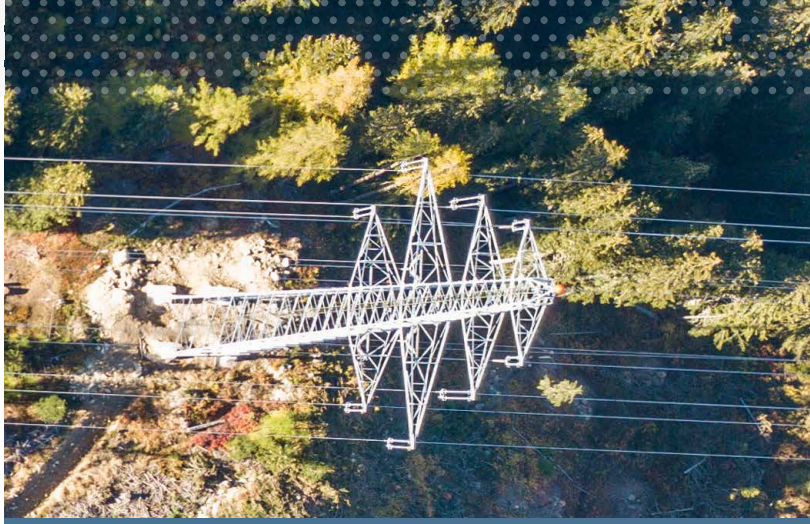
Addressing shortages

This is creating additional pressure on occupations that are already experiencing skills shortages in the UK labour market – particularly in critical areas such as HVDC Engineer, Overhead Lines Worker, Cable Jointer, Senior Authorised Person, Commissioning Engineer, Welder, and Protection Engineer. Collectively, these skills shortage occupations account for 15,500 (17%) of the entire electricity networks workforce – and 13,400 (19%) of the anticipated 71,000 vacancies forecast to be created by 2035.

The electricity networks workforce extends far beyond network operators, construction companies and equipment manufacturers. Delivering future network investment will require a diverse ecosystem of independent distribution network operators (IDNOs), contractors, engineering consultancies, manufacturers, equipment suppliers and specialist service providers.

Together, these organisations design, manufacture, build, connect, operate and maintain the infrastructure that underpins the electricity system. Many of these are SMEs that may have limited resources to get maximum benefit out of a complex skills landscape – especially across national boundaries.

IDNOs are expected to play an increasingly important role in delivering new customer connections and supporting network expansion. As connection volumes grow and projects become more complex, workforce requirements will evolve beyond traditional delivery and project management roles towards a greater combination of engineering, technical compliance and customer-facing capability.



Case study:

A Dedicated Overhead Line Training Facility

SP Energy Networks and Balfour Beatty are working together to establish a dedicated overhead line training school near Bridge of Weir in Renfrewshire. The facility utilises an existing, de-energised overhead line secured through an agreement with a local farmer. This school will be used to train approximately 90 people over the next five years. This training initiative is specifically targeted at overhead line workers who are completely new to both Balfour Beatty and the wider overhead line industry.

The workforce and skills opportunity

By 2035, the electricity networks sector direct workforce will grow from 90,000 today, to 117,000 – creating an additional 27,000 jobs (up 30% above current levels). Analysis for the Sector Growth Plan shows that much of this growth will be seen in Construction & Installation, currently employing 18,000 people which will approximately double by 2035.

The sector will also have to replace around 44,300 people who will leave the sector's workforce through a mix of retirement and staff turnover. An estimated 21,600 people will retire from the workforce – equivalent to 24% of the current total. Manufacturing, and Construction & Installation will see a greater proportion of their workforces retire (both 27%; 6,300 and 4,800 people, respectively) alongside Operation & Maintenance (21%; 10,500 people).

Furthermore, 22,700 people will leave the sector's workforce through normal staff turnover – equivalent to 25% of the current workforce.

Where skills will be needed

In total, the electricity networks sector will need to attract, recruit, train and retain some 128,000 people over the next decade, including 71,000 direct roles and 57,000 indirect roles (the extended supply chain).

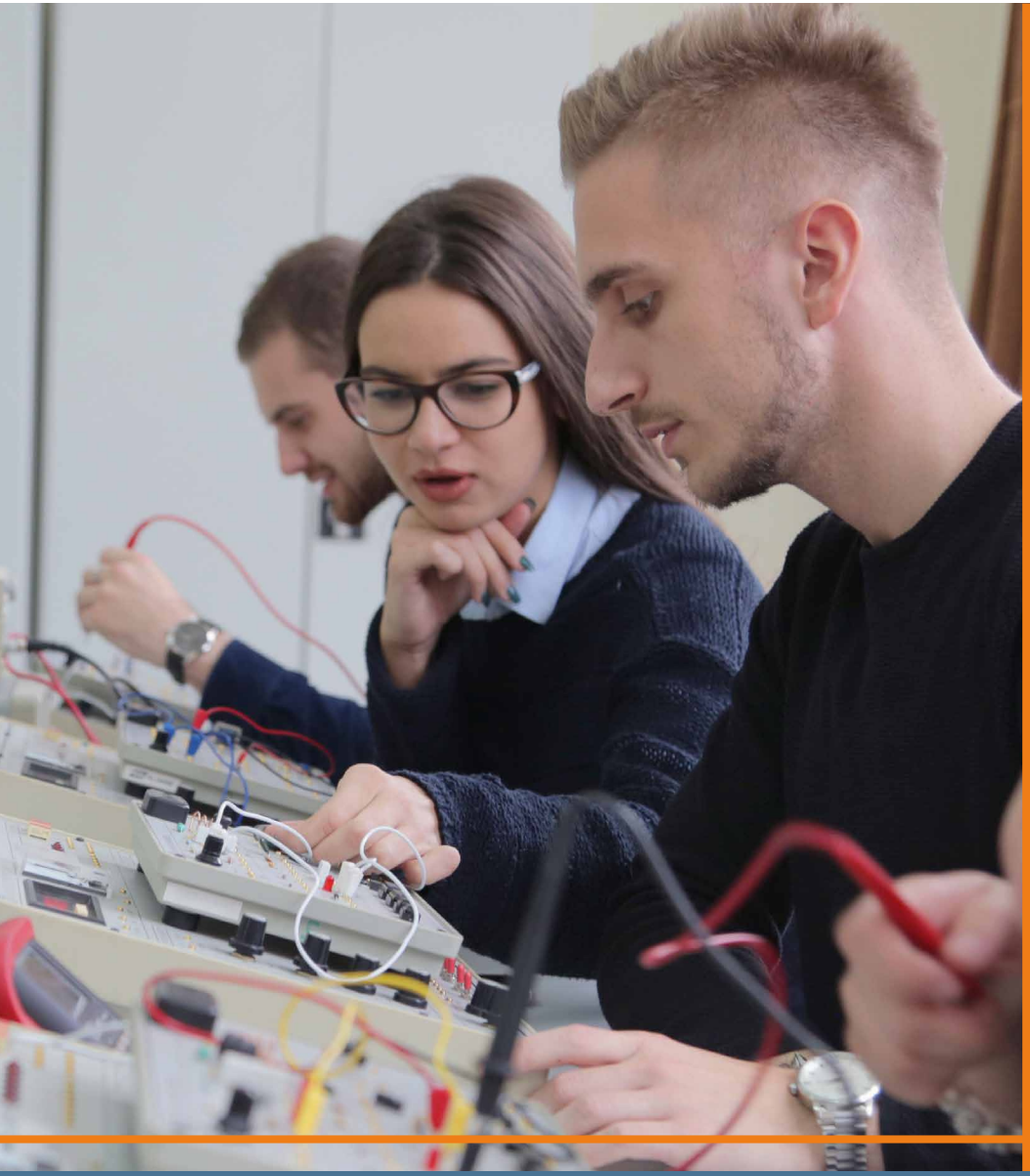
Significant demand for new people to join the workforce is expected across all regions, but particularly across Scotland, including rural and island communities, and across the Midlands (East and West).

The 71,000 people needed by the sector over the coming decade will present opportunities for people at all skill levels,

but primarily at:

- Sector entry (RQF[9] levels 1-2 (SCQF level 4-5 in Scotland)): An estimated 15,400 vacancies will be created at this level – 23% of all predicted vacancies. These roles represent a great opportunity to change the lives of many people, particularly the unemployed including those young people who are NEETs, and to create significant social value in many communities around the country.
- Craft level (RQF 3 (SCQF 6 in Scotland)): Could see an estimated 23,600 vacancies created at this level. Given recent trends in apprenticeship take-up in the sector, there is the potential for around 6,000 new apprenticeship starts over the next decade.
- Graduate level (RQF 6 (SCQF 9-10 in Scotland)): 14,900 vacancies are forecast at this level.
- Management and leadership (RQF 7-8 (SCQF 11-12 in Scotland)): 8,900 vacancies could be created at these higher levels.

9 RQF is the Regulated Qualifications Framework and SCQF is the Scottish Credit and Qualifications Framework.



Training and upskilling

Recruitment volume alone will not deliver the workforce the sector needs. Equally critical are the capacity to train and upskill people, and the ability to retain them amid competition from adjacent industries.

As networks become more digitalised, connected and flexible, traditional trades and engineering roles remain essential. However, they are increasingly augmented by data-driven tools and advanced system operation. Training and qualifications must therefore evolve to cover engineering, asset management, digital technologies and system operation.

Contractors, delivery partners and independent operators will continue to supply much of the labour for construction, commissioning and customer connections, while manufacturers and equipment suppliers have significant scope to expand capacity and specialist roles in design, automation, testing and advanced production.

Across the sector, demand for skills in data, cyber security, digital systems, programme delivery and stakeholder engagement will grow and must be prioritised in workforce planning and training provision.

Case study:

Investing in skills for the future: Siemens Training Academy

Siemens is investing in a new Training Academy, launching in September 2026, to help develop the next generation of Protection and Automation engineers. The academy combines classroom learning, expert-led technical training and hands-on project experience in a dedicated training facility, enabling apprentices to build and test real network control and protection systems.

By investing in specialist facilities, structured development programmes and practical engineering experience, Siemens is strengthening the future skills pipeline needed to support the delivery of the UK's modern electricity infrastructure.



Visibility of supply chain demand

Workforce and supply chain capacity takes years to develop.

Experienced engineers, site leaders, technicians and manufacturing specialists require prolonged training and on-the-job development to reach full competency. This means that growth in the skilled workforce must be planned and delivered ahead of demand rather than in reaction to it.

Without clear, multi-year workload visibility, employers and particularly supply chain firms will be reluctant to invest in long-term apprenticeships and capability expansion. This carries a real risk that delivery ambition outpaces delivery capability.

Demand visibility is particularly salient for manufacturers and suppliers of transformers, switchgear, cables, power electronics and digital systems, where expanding specialist capability in design, testing and skilled assembly must go hand-in-hand with productivity improvements from automation and modern manufacturing techniques.

Future-proofing training

Success will hinge on future-proofing training and qualifications, so that they combine traditional engineering expertise with data, digital and systems skills that boost productivity, safety and asset performance. Organisations that deploy skilled people most effectively and foster environments where knowledge, technology and innovation reinforce one another will outperform those that rely on scale alone.

Many employers are already investing in sector-entry pipelines, apprenticeships, graduate programmes and retention initiatives. However, further action is needed to broaden the talent pool, fully develop recruits and retain them amid competition. In the short term, and where domestic supply cannot meet urgent technical needs, a managed contribution from skilled overseas labour may be required, which will demand greater flexibility in current mechanisms.

As organisations develop experience in large-scale programme delivery, advanced manufacturing and digital energy technologies, they will be better placed to support innovation, export growth and international competitiveness. The long-term aim is therefore not simply to increase headcount, but to build a more capable, productive and internationally competitive electricity networks ecosystem that continues to support economic prosperity long after the current investment cycle, positioning Great Britain as a potential global leader in network delivery, workforce development and energy infrastructure expertise.

Without co-ordinated action, workforce capacity and capability constraints could contribute to delays in infrastructure delivery, increased project costs, reduced productivity and growing pressure on critical supply chains. At a time when many countries are investing heavily in energy infrastructure and workforce capability, maintaining a skilled, productive and resilient workforce will be critical to ensuring Great Britain remains an attractive place to invest and grow.

Progress already underway

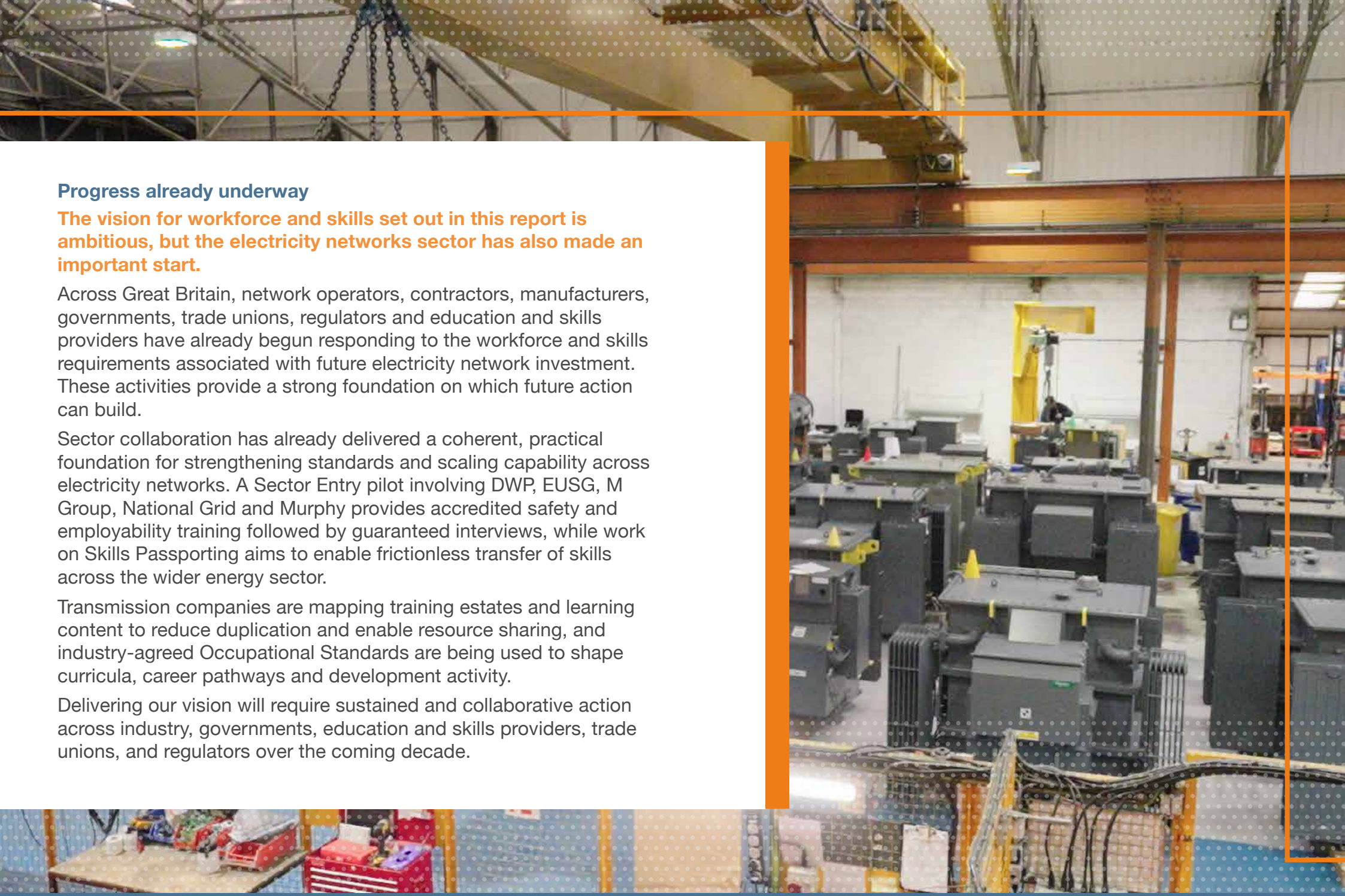
The vision for workforce and skills set out in this report is ambitious, but the electricity networks sector has also made an important start.

Across Great Britain, network operators, contractors, manufacturers, governments, trade unions, regulators and education and skills providers have already begun responding to the workforce and skills requirements associated with future electricity network investment. These activities provide a strong foundation on which future action can build.

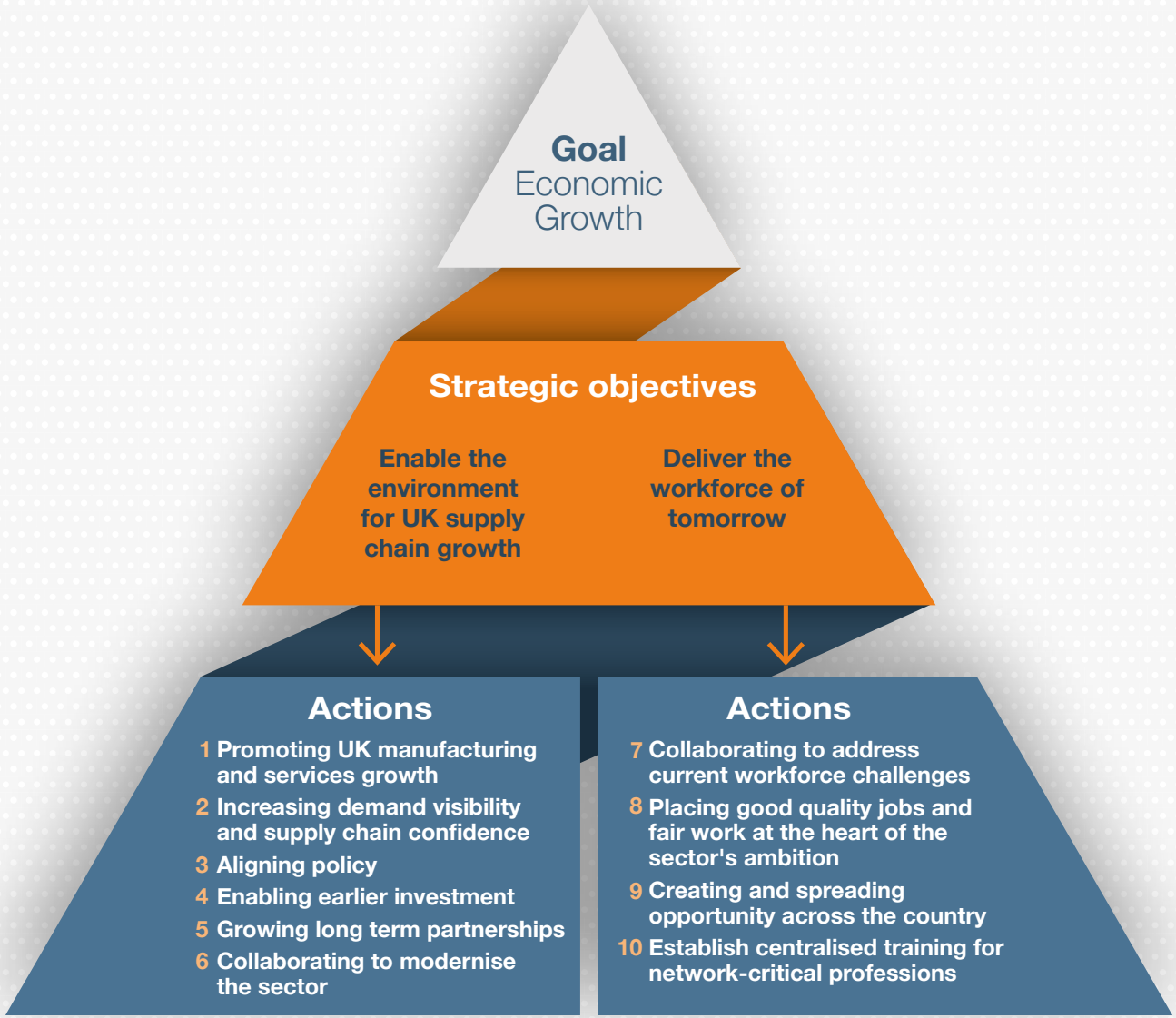
Sector collaboration has already delivered a coherent, practical foundation for strengthening standards and scaling capability across electricity networks. A Sector Entry pilot involving DWP, EUSG, M Group, National Grid and Murphy provides accredited safety and employability training followed by guaranteed interviews, while work on Skills Passporting aims to enable frictionless transfer of skills across the wider energy sector.

Transmission companies are mapping training estates and learning content to reduce duplication and enable resource sharing, and industry-agreed Occupational Standards are being used to shape curricula, career pathways and development activity.

Delivering our vision will require sustained and collaborative action across industry, governments, education and skills providers, trade unions, and regulators over the coming decade.



Realising our ambition through sector collaboration



The Electricity Networks Sector Growth Plan details, for the first time, how the UK can deliver clean, secure and affordable power while anchoring skilled jobs, stronger supply chains and industrial renewal across the UK for decades to come. The sector's contribution to economic growth is driven by two clear strategic objectives – to enable the environment for UK supply chain growth and to deliver the workforce of tomorrow. Each of these objectives is underpinned by a series of actions that together will maximise the economic opportunity over the next decade.

Delivering our Vision for 2035 will require co-ordinated action across industry, governments, Ofgem, network operators, manufacturers, suppliers, education and skills providers, and trade unions. Network companies can provide long-term visibility and confidence to invest. Governments and regulators can create the policy and regulatory conditions for growth. Suppliers can respond by investing in people, facilities and innovation.

No single organisation can deliver this transformation alone, making sustained collaboration essential to maximising the economic, industrial and societal benefits of electricity network investment.



A new Growth Partnership

ENA and BEAMA will launch the **Electricity Networks Growth Partnership** – establishing the leadership, coordination and accountability needed to turn the Plan's ambition into action and ensure growth is delivered over the next 10 years.

The Growth Partnership will provide the **enduring delivery mechanism for the Growth Plan,** bringing together senior leaders from across networks, the supply chain, Government, Ofgem, Great British Energy and wider partners around a shared programme of action. Its focus will be clear: **drive delivery, maintain momentum, track progress and ensure commitments are met.**

At the heart of the Partnership will be a **strong Growth Partnership Board,** comprising senior decision-makers from across the sector and key stakeholders. The Board will set priorities, approve the annual work programme, review delivery and hold partners to account. It will provide the senior leadership and convening power needed to ensure the Growth Plan is implemented and that the sector remains collectively focused on delivery, creating a platform to work with Government and the regulator on collective action to drive Growth across the economy and support Government ambition for re-industrialisation. This is an unprecedented move, and ENA and BEAMA are delighted to be spearheading a level of collaborative working never seen before for the Electricity Networks Sector.



The Partnership will:

- **Drive delivery** of the priority actions set out in the Growth Plan.
- **Set and oversee sector commitments,** securing collective ownership and accountability.
- **Track, measure and report progress** against agreed actions and outcomes.
- **Identify and escalate barriers to delivery**, including where action is required from Government or Ofgem.
- **Coordinate existing programmes and activity** around the priorities of the Growth Plan.
- **Provide evidence and recommendations** to Government and Ofgem where decisions are needed to enable delivery.
- **Champion the contribution of the sector to economic growth and regional prosperity,** supporting investment across the supply chain.

The Partnership will establish clear Sector Growth Commitments and an annual delivery programme. Progress will be reviewed by the Partnership Board and reported through an annual Growth Partnership Report, providing transparency on what the sector has committed to deliver, progress achieved, emerging risks and the actions required to maintain delivery.

This is a scalable partnership model, similar to how other sectors have successfully facilitated growth across their supply chains, ensuring an enduring delivery framework for growth linked to the UK's Industrial Strategy. Phase 1 will establish the strong strategic Board and programme office, while building the foundations for a future independent delivery body as the scope, funding and wider policy framework develop. This enables the Partnership to begin delivering immediately while retaining the ambition to expand its role as the sector's growth agenda develops.

Great British Energy (GBE) has announced an expansion of its £300 million Supply Chain Fund: Offshore Wind and Networks. This opens new capital grant funding opportunities for manufacturers across the UK, with 17 additional critical components now eligible for funding, with 13 of the added components key for electricity networks supply chains. The Fund forms a key part of GBE's £1 billion Energy Engineered in the UK (EEUK) programme, which aims to unlock investment in UK clean energy supply chains, create skilled jobs and strengthen the country's industrial capabilities. The Prime Minister has announced Great British Grid (GBG) as a new branch of Great British Energy (GBE) which will support new investment in the grid – strengthening competition and helping tackle barriers to delivery across the networks sector.



Case study

Powering the future: unlocking flexibility, lowering bills

The challenge

As electricity demand grows, networks need more flexibility to help manage constraints and avoid unnecessary reinforcement. Yet domestic battery storage, one of the most valuable sources of flexibility, remains inaccessible to many households because of upfront costs.

The sector needs new ways to unlock flexibility at scale while ensuring customers can benefit from the energy transition.

The solution

Northern Powergrid and E.ON Next developed Empower Flex, a first-of-its-kind trial designed to remove the barriers to participating in flexibility markets.

By providing flexibility payments upfront rather than over time, the trial supported the installation of up to 100 home batteries for customers in Crowle and Starbeck. Participating customers received installation, maintenance and support at no cost, alongside a guaranteed annual benefit of £480, without needing to change how they use electricity.

The batteries then provided flexibility services to support the local network when it needed them most.

Impact

Empower Flex demonstrated that customer flexibility can deliver value for households and networks alike.

The trial is forecast to deliver more than 40 MWh of flexibility, helping defer around £5 million of network reinforcement. It also proved a new commercial approach to deploying flexible assets, showing how upfront funding can unlock investment and accelerate participation in flexibility markets.

Crucially, the success of Empower Flex extended beyond the trial itself. The approach has now been adopted as a business-as-usual offering called Flex Advance, making the upfront funding mechanism available to flexibility service providers across Northern Powergrid's flexibility markets.

Looking ahead

Flex Advance builds on the lessons learned from Empower Flex by retaining the innovative upfront funding model while allowing providers the flexibility to determine how best to develop and deploy flexible assets.

Northern Powergrid is also working with Ofgem to explore how flexibility contracts could span multiple price control periods, creating stronger long-term investment signals and supporting the growth of flexibility markets in ED3 and beyond.

As networks across Great Britain look for cost-effective ways to support electrification, Flex Advance offers a blueprint for how innovative market design can unlock new sources of flexibility, reduce network costs and accelerate the transition to a smarter energy system. What began as a local trial is now helping shape the future of flexibility procurement across the sector.



Enable the environment for UK supply chain growth

Action 1: Promoting UK manufacturing and services growth

The UK can make better use of procurement as an industrial and delivery tool. While procurement cannot, on its own, create manufacturing capacity where there is no investment case, it can influence whether suppliers see the UK market as attractive, whether resilience and delivery certainty are valued alongside cost, and whether domestic capacity has a clearer route to scale.

Current procurement practice does not fully capture the wider value of domestic capability, shorter supply chains, resilience or social value – remaining heavily weighted towards lowest upfront cost and technical compliance. Procurement practice should go further in capturing this value, while reflecting the availability of domestic capability and ensuring markets remain competitive, innovative and deliver value for money for consumers.

The sector has agreed a **definition of local content** that will be the basis for measuring, evidencing and reporting the UK economic contribution arising from electricity network investment.

> ***Local content refers to the contribution of UK-based goods, services, labour, and supply chains to the delivery, operation, and maintenance of electricity network infrastructure.***

Our Local Content assessment of impact includes associated value creation generated within the UK through domestic supply chain participation, UK-based employment, skills development, social value creation and investment in local and national economies. Local content is deemed to have been engaged where expenditure results in measurable UK economic benefit. This includes UK based job creation, skills development, local community support and business and supply chain growth, with due regard to efficiency, competition and value for money for consumers.

A shared, proportionate methodology to assess and report Local Content across electricity network activities is being developed and implemented. The methodology will:

- be aligned with wider social value considerations and existing procurement frameworks;
- provide sufficient flexibility to reflect different project types and procurement approaches;
- enable combined and consistent reporting across transmission and distribution networks;
- enable annual sector-level reporting, which will build upon the LCP Delta economic assessment and evolve over time.

The sector recognises the important role that social value can play in supporting economic growth.

Where appropriate, networks will adopt social value weightings at or above 10%, provided they can be implemented in a manner consistent with wider legal and regulatory obligations, the specific requirements of the procurement in question and the overarching requirement to deliver value for money for consumers.

The Growth Partnership will consider how encouragement to increase Local Content in procurement activity can be extended to the non-regulated sector, and how this can support Tier 2 and 3 suppliers. It will also work with Government and UK Export Finance to identify and capitalise on export opportunities for UK manufacturing and services, so that sector growth is not solely dependent on domestic demand.

The procurement actions above are necessary but more is needed. Regulated networks are subject to legal and regulatory obligations and must use a balanced approach to tender evaluations. The supply chain will work with government to identify key barriers to UK competitiveness and how they can be overcome, to ensure that UK providers have the best possible chance of commercial success.

Coordinated action in this space can ensure that the sector maximises the economic benefits to the UK by increasing the proportion of supply chain investment that flows through the UK economy. The Growth Partnership will work with GBE, UK Government and public finance institutions to prioritise investment into distribution and key make, nurture, buy categories - concentrating support where it will be most impactful.



Enable the environment for UK supply chain growth

Action 2: Increasing demand visibility and supply chain confidence

The scale of investment required across GB's electricity networks demands a more stable and predictable policy and regulatory environment. The supply chain is making decisions on factories, equipment capacity and workforce development over much longer time horizons than a single price control period. Manufacturers and service providers require clear, credible signals on future demand if they are to invest ahead of need and at the scale required.

Stakeholder engagement highlighted that uncertainty around future investment volumes is a key constraint to investing in new capacity. While TOs and DNOs forecast investment volumes as part of their business plans, very little of this information is made available to the supply chain. Non-regulated customers, such as data centres, are often working to even shorter timelines than price controls, and the supply chain consequently cannot plan to accommodate their demand.

The effect of this is to constrain domestic capacity, increase lead times, and risk the supply chain falling behind the needs of the sector because it cannot make a case for investment. This results in a smaller, less resilient UK supply chain and higher unit costs to consumers.

The suite of strategic energy plans can provide a better high-level view of demand for the supply chain. Government, NESO and Ofgem should work together to provide a clearer long-term view of network requirements, translating these plans to transparent asset-level demand signals. This would provide suppliers with some confidence that investment opportunities will be sustained beyond individual price control periods.

But translation of national policy plans alone will not provide sufficient visibility. Network companies should coordinate and share asset-level demand signals to enable the supply chain to understand the likely timelines of orders and plan their capacity accordingly.

This is particularly critical at distribution level, where lead times are shorter, demand is more variable and there are not published network plans that can be directly translated into asset volumes.

At both Distribution and Transmission level, networks will take broadly similar approaches to commitments on equipment volumes, with DNOs[10]/TOs producing rolling ten-year demand projections for key equipment and component categories, with appropriate caveats to account for uncertainty around future price control periods.

Appropriately aggregated and anonymised data will be published at Distribution/Transmission level, providing the supply chain with greater visibility of future demand and helping to underpin investment and capacity planning decisions.

Individual network requirements will be submitted annually to Ofgem and aggregated into a GB-wide workbook at Distribution/Transmission level, providing the supply chain with greater visibility of future demand and helping to underpin investment and capacity planning decisions.

Networks will also identify the proportion of demand that remains unsecured and therefore represents a market opportunity for suppliers. This will provide the supply chain and investors with an accurate and high-confidence pipeline of future component demand to inform strategic planning and investment decisions.

The supply chain will need visibility over a longer period to underpin large scale investment, beyond the point where network companies can realistically be expected to forecast their individual volumes[11]. The workbook[12] will therefore be complemented by longer-term equipment and asset forecasts published by the Growth Partnership, working with NESO to translate future strategic network plans into asset level data[13].

Manufacturers have consistently signalled that improved visibility alone is not sufficient to underpin investment decisions to expand, but it is a critical component. The supply chain will respond to these signals by investing in greater capacity when it is able to make a clear investment case to do so. Without these signals, it is unlikely that the supply chain will be able to respond.

The supply chain will also examine ways to provide greater visibility of supply chain lead times and bottlenecks to improve planning and coordination across the wider sector.

Together, these steps will lower investment risk, strengthen investor confidence and enable the supply chain to commit capital, expand capacity and develop the workforce needed to deliver low-carbon infrastructure at pace.

10 Subject to confirmation of ED3 investment allowances and delivery plans
11 Volumes and lead times are dynamic and subject to change over time due to developments in project design, engineering decisions, system requirements.
12 The dates provided will be “need by”, rather than “order by” dates.
13 All data should be treated as indicative at the time of publication. Longer term asset volumes (greater than 5 years) are based on projections developed by the Sector Growth Plan analysts in accordance with the FES scenarios. These asset volumes are of a lower confidence level to those leading within five years due to the lower maturity level of the associated projects. Confidence levels will improve as these projects progress through their respective technical design, routeing, and consents processes.



Enable the environment for UK supply chain growth

Action 3: Aligning policy

Delays and uncertainty in receiving decisions on land rights and planning consents are a significant delivery risk because they change when equipment is needed on site, which disrupts supply chain planning and scheduling – particularly for long-lead items.

Recent changes arising from the Planning and Infrastructure Act (2025) and the reforms detailed in the Government response to the Electricity Network Infrastructure consultation are welcome. Networks will work with UK and devolved governments to pursue further improvements where, and if, required to deliver reforms to land rights, land access, and consents processes.

Clarifying the future use of SF_6 to create a credible market for SF_6 -free equipment.

Sulphur hexafluoride (SF_6) is a potent greenhouse gas used extensively in high-voltage switchgear across Great Britain's electricity network. The EU has introduced regulations to tighten use of this gas, but there is uncertainty over the regulatory and legislative approach in the UK. This uncertainty is creating avoidable cost and inefficiency and making planning harder for networks and suppliers. It is impeding supply chain investment in switchgear containing SF_6 and SF_6-free alternatives, increasing lead times and risking the UK market being deprioritised.

Government should consult and then legislate on a pathway for the phase out of new equipment containing SF6, including the timing of transition, the treatment of existing assets and the basis for any exemptions. Clarity on process is needed, this includes Government consultation by early 2027 and a statement on phaseout to follow after.

Ofgem should then ensure that the regulatory treatment of transition-related investment is clear, particularly where networks need to act early to secure product availability or avoid future delivery constraints. Early clarity will be particularly important to enable DNOs to prepare for the ED3 price control.

Clarifying and reporting on the Growth Duty Data Reporting Framework.

The framework is an approach to ensure that regulators report on the impact of their decisions on economic growth. It is designed to enhance transparency, promote accountability, and foster trust between government, regulators, and the regulated.

The networks will work with Ofgem to clarify and report against the framework, supporting Ofgem to deliver against the objective, ensure that growth carries measurable weight in regulatory decisions, and achieve the growth envisaged by the Sector Growth Plan.

We will also work with UK Government and Networks to explore routes for ensuring Procurement Act 2023 can support growth outcomes.

Providing greater long-term visibility of the scale and trajectory of electrification across the economy to stimulate markets and support multi-sector coordination.

Clean Power 2030 has been a success in that it set out industry-wide objectives that can be used for stimulating markets, encouraging private investment, enabling planning decisions to be made, and enabling multiple sectors to co-ordinate and cooperate.

Industry encourages government to consider how it can provide greater long-term visibility of the scale and trajectory of electrification across the economy, to support investment, supply-chain development and effective network planning. Government will continue to engage with industry on the evidence and strategic signals required to support these objectives.





Enable the environment for UK supply chain growth

Action 4: Enable earlier investment

Delivering network infrastructure at the pace required will depend on moving investment decisions much earlier in the delivery cycle. The supply chain has consistently indicated the need for firm, full orders, as early as possible, in order to plan and scale up capacity.

While these developments have delivered benefits, these measures only support the transmission sector. Ofgem has committed to reviewing the Transmission APM in 2028, and in reviewing the mechanism should consider how it can support economic growth and supply chain resilience while ensuring value for money and appropriate consumer protection. At this stage, Ofgem and TOs should explore if the APM can further address critical UK service and delivery bottlenecks.

Similar measures may be needed in the distribution sector. Ofgem and industry should explore how to enable DNOs to secure critical equipment and capacity earlier in the investment cycle where there is a clear and evidenced system need, including considering the introduction of a Distribution Advanced Procurement Mechanism.

Earlier confirmation of need, supported by credible planning assumptions from NESO and distribution planning processes, would allow network companies and suppliers to move from reactive procurement towards strategic investment.

It would also create the conditions for transformational partnerships between DNOs and the supply chain, including long-term volume commitments that incentivise suppliers to establish new facilities, expand manufacturing capacity and invest confidently in UK capability. This type of regulatory certainty is essential if the sector is to secure the scale of investment required over the coming decades.

In order to secure capacity, non-regulated customers, including offshore wind developers, also need to be able to place full, firm orders with the supply chain as early as possible. Where policy constraints, such as the timing of the Contracts for Difference process, prevent project developers from committing early, government should consider how policy can best support developers, in order to avoid increasing costs to consumers.

Case study

Winder Power Invests £3.5 Million to Strengthen UK Grid Infrastructure Manufacturing

As part of its commitment to supporting the Electricity Networks Sector Growth Plan and the UK's transition to a secure, resilient, and low-carbon electricity system, Winder Power is investing £3.5 million in expanding its manufacturing and service capabilities. The investment focuses on increasing the UK's domestic capacity to manufacture, test and service critical power transformers that form the backbone of the electricity transmission and distribution network.

The investment includes increased capacity for the production and testing of 132kV power transformers to support larger volumes of transmission and distribution transformer projects.

Additionally, Winder Power is expanding its Rothwell Transformer Services facility to strengthen transformer refurbishment, repair, maintenance and life-extension capabilities. This expansion will enable greater support for utility customers seeking to extend the operational life of existing transformer assets while maintaining network reliability.





Enable the environment for UK supply chain growth

Action 5: Grow long-term partnerships

Network companies have started to move away from scheme-by-scheme procurement and towards greater use of strategic partnerships, enabling delivery of ambitious schemes such as ASTI projects at greater pace.

TOs have established long-term relationships and incentivised outputs, giving faster access to the supply chain in a constrained market through partnership models and long-term strategic frameworks. Commitments within these models represent a significant boost to the UK supply chain that will help deliver economic growth.

Within RIIO-T3, networks are stimulating supply chain capacity by reserving capacity in advance so that the supply chain can invest in expansion, utilising the APM. TOs are also establishing strategic long-term relationships to drive long-term consumer value.

These more strategic supply chain actions provide valuable lessons for the distribution networks ahead of the ED3 price control.

Networks are committed to developing and maintaining long-term partnerships with suppliers. They also want to ensure that procurement approaches achieve an appropriate balance between securing best value for the consumer, ensuring project delivery and supporting Government growth ambitions.

DNOs are committed to developing and maintaining longer-term strategic partnerships with suppliers, including, where appropriate and subject to the ED3 price control framework and regulatory settlement, **offering longer contractual commitments and greater certainty over expected volumes.** This will provide suppliers with greater confidence to invest in additional capacity, skills and capability, and enable greater flexibility in delivery models.

DNOs will seek to use the procurement and contracting mechanisms available to them to provide greater visibility of future requirements and, where this represents value for money for consumers, make longer-term commitments to the supply chain. Greater certainty over the scale and timing of future demand should strengthen the investment case for suppliers to expand capacity, helping to reduce the risk of higher unit costs and extended lead times in a constrained market.

In developing their approach for ED3, DNOs will consider how best to provide this greater certainty while maintaining appropriate flexibility to respond to changes in network requirements, technology and customer demand. The extent of commitments will necessarily be dependent on the final ED3 framework, including the outputs, funding and regulatory arrangements agreed with Ofgem.

DNOs will work with Government, Ofgem and the supply chain to develop procurement and contracting approaches that strike an appropriate balance between securing best value for consumers, providing confidence to suppliers to invest, ensuring delivery of network investment and supporting the Government's wider growth ambitions.

Similar actions by non-regulated customers would also have benefits in securing constrained supply chain capacity and providing suppliers with the confidence to expand. The Growth Partnership will explore how similar measures can take place outside the regulated sector.



Case study:

SSEN Transmission's Modular Substation

SSEN Transmission have announced a new approach to substation delivery, through the use of modular substations. The substations are designed to operate at 132kV and 33kV voltage levels, with typical use expected to consist of connecting onshore renewables to the grid such as individual windfarms. SSEN Transmission have awarded a major framework agreement to Hitachi Energy UK and GE Vernova, following a competitive tender process.

The substations are of a modular design, allowing for much of the assembly, wiring and testing to be completed before installation and commissioning. This helps lower costs while ensuring quick delivery. The substations offer a standardised, repeatable, modular design largely built in the safer and cleaner conditions of the factory rather than site, without compromising network reliability standards.





Enable the environment for UK supply chain growth

Action 6: Collaborating to modernise the sector

Unlocking the full economic and delivery opportunity of network investment will require a more co-ordinated approach to innovation, standardisation and industrial development across the sector.

Through coordinated action by network operators, ENA, BEAMA, Ofgem and Government, the sector can create a more consistent and attractive investment environment, establishing business support programmes to enhance UK supply chain competitiveness and enabling innovative technologies to scale more rapidly while giving manufacturers the confidence to invest in long-term capability.

A more modern, standardised and innovation-led sector will be better positioned to attract investment, strengthen resilience and maximise the economic value created through the once-in-a-generation programme of electricity network expansion.

The Growth Partnership will work with ENA and networks to streamline and resource approval processes, creating faster routes from proven pilot to business-as-usual deployment for introduction of new technologies. This includes support for bringing new entrants into the supply chain to drive UK competitiveness and growth

Capitalising on innovation, digitalisation and reuse

The UK has a strong base of technical and engineering capability, but proven ideas are failing to enter business-as-usual operations within a reasonable timeframe. In many parts of the market, the bottleneck is the route from trial to routine deployment. This leads to higher costs of running the network and disincentivises investment in innovation.

Innovation must move more effectively from pilot projects into business-as-usual deployment, creating faster routes to market for proven technologies and enabling greater participation from SMEs, manufacturers and private investors. A more collaborative approach between network operators, regulators, innovators and the supply chain can accelerate adoption, improve productivity and reduce the overall cost of network delivery.

The Growth Partnership will develop a roadmap to improve innovation implementation, considering how the current suite of mechanisms work together to enable innovations to be rolled out to business as usual. The ENA and network operators will also streamline and resource processes for bringing new products on to the network.

The Growth Partnership will work with innovators, networks, Government, public financial institutions, and Ofgem to develop an environment that supports innovations developed in the UK to be manufactured in the UK.

Case study:

Wilson Power Solutions: BESS transformer export to Europe

Since 2020, Wilson Power Solutions has worked in close partnership with multiple developers and battery technology manufacturers to support the rapid deployment of Battery Energy Storage Systems (BESS), helping to strengthen electricity networks and accelerate the transition to Net Zero. What began as a collaboration in the UK has grown into a long-term engineering partnership that now supports landmark energy storage projects across the EU, demonstrating the UK's ability to export specialist engineering expertise into European renewable energy markets.

As a result, Wilson Power Solutions secured contracts for 475 MV Transformers and 7 Power Transformers, including 400kV EHV across four countries in Europe.

These transformers will support the energisation of 1.7 GW / 5.3 GWh of Battery Energy Storage Systems.

As one of the UK's early transformer manufacturers to work with major battery Original Equipment Manufacturers (OEMs), Wilson Power Solutions established itself as a trusted technology partner during the formative years of utility-scale BESS. By collaborating closely with the engineering team of one of the internationally leading utility-scale battery manufacturers from the outset, the company helped develop transformer solutions that complemented the evolution of battery pack technology over the years, creating a partnership built on technical innovation, reliability and continuous improvement.

Having gained valuable experience delivering projects during the UK's early adoption of large-scale battery storage, Wilson Power Solutions was well positioned to support Tesla when their operations expanded across Europe—creating significant export opportunities.



Digitalisation also has an important role in improving use of network assets, directing investment and supporting more efficient delivery in the supply chain. Future network performance will increasingly depend on the ability to collect, share and act on data in real time. The Growth Partnership will work to ensure those opportunities are maximised, supporting delivery of an efficient, modernised network and lowering costs to consumers.

The sector will also collaborate to improve standards for product environmental data – BEAMA and ENA will jointly deliver an industry-wide framework for data metrics, building on work already underway. The Growth Partnership will also look to coordinate new guidelines on asset reuse, responsible recycling and reclamation, with a view to creating a regulated pathway for the resale and recommissioning of refurbished network equipment, subject to appropriate safety and performance standards.

Delivering the benefits of standardisation

Over time, the requirements of network operators and products offered by the supply chain have often evolved to meet legitimate operational and reliability needs, innovation, and best practice. This has led in some cases to equipment being delivered through multiple equipment variants, project-specific specifications and repeated design effort. These challenges can sometimes stretch to commercial terms and approaches associated with the delivery of network infrastructure.

Embedding standardised, interoperable, and modular approaches within delivery models and equipment design requirements has the potential to unlock efficiencies across the entire network build value chain. As the scale of network delivery grows, standardisation has the potential to deliver benefits not only in the manufacturing process, but across design, construction, operations and maintenance, and safety. However, whilst the potential benefits are clear, it is equally important to balance these against the costs, risks, and constraints the changes could create in what is a complex and diverse energy system. This will ensure consumer value is at the centre of these decisions.

In the Transmission Sector, the Transmission Owners (TOs) have already started to deliver on this, through the establishment of a joint-TO workstream with a specific focus on standardising equipment specifications by examining both existing levels of alignment in the sector and opportunities to go further. The TOs, in collaboration with the ENA, will continue to engage the supply chain as this workstream progresses and recognise the need to consider factors outside of technical specifications when assessing the benefits and drawbacks of standardising equipment designs.

Moving forward, the Growth Partnership will work with the ENA and BEAMA in their existing roles setting technical specifications, and the wider supply chain to identify the greatest opportunities from further harmonisation and standardisation across the Networks Sector. This will include identifying the equipment categories, design areas and commercial interfaces where variation is creating costs and delays. The network operators will work with the Growth Partnership to assess and where appropriate deliver these opportunities.

Case study:

Acrastyle Limited Invests in UK Manufacturing Capacity to Support the Energy Transition

Preparing for the UK's Growing Electricity Infrastructure Requirements

Network reinforcement, renewable energy connections and the electrification of transport and industry are placing growing demand on the UK's electricity infrastructure and the supply chain that supports it. Recognising this, Acrastyle Limited, a pioneering company established in 1962 and a subsidiary of S&S Power Group, has invested in its people, facilities and processes, and engineering resources and capability, to increase UK manufacturing capacity. Built on a long-standing commitment to excellence in electrical engineering, Acrastyle Limited aims to be a leading provider of Protection and Control solutions in the UK and global export markets, supporting customers delivering critical national infrastructure.

Investing Ahead of Demand

Acrastyle Limited has invested ahead of market demand rather than reacting after capacity constraints emerge. The first phase of expansion at its Ulverston, Cumbria facility is complete, alongside a major refurbishment and reorganisation of the site, modernising production areas, improving material flow and creating capacity for higher output.

Engineering resources and capability have also been augmented, strengthening Acrastyle Limited's ability to meet increasingly complex customer requirements.

Supporting Supply Chain Resilience

Acrastyle Limited has worked closely with suppliers to improve forecasting, increase visibility and strengthen strategic relationships, helping minimise disruption for customers in critical infrastructure sectors. Maintaining domestic manufacturing capability also strengthens national resilience for strategically important equipment.



Case study:

The Manufacturing Skills Academy (MSA)

The National Manufacturing Institute for Scotland (NMIS) Manufacturing Skills Academy (MSA) offers a systems-led route to closing the workforce gaps set out in the Electricity Networks Sector Growth Plan, where shortages of electrical and mechanical engineering talent are a recognised constraint on grid manufacturing scale-up.

MSA operates its own learning management platform delivering online, face-to-face and blended Continuing Professional Development (CPD), building new provision where none exists (for example the semiconductor course delivered with Heriot-Watt and the University of Valencia) and aggregating demand across multiple employers to make provision sustainable.





Deliver the workforce of tomorrow

Action 7: Sector collaboration to address current workforce challenges

For the first time, the electricity networks sector has come together to undertake a co-ordinated assessment of future workforce and skills requirements and develop a shared action plan to address them. Through the Electricity Networks Sector Growth Plan, more than 100 organisations and over 400 stakeholders have contributed to the evidence base, insights and recommendations that underpin this report, making it one of the most comprehensive workforce and skills exercises ever undertaken across the sector.

This collaborative approach reflects a growing recognition that workforce capability is now a strategic enabler of future electricity network investment and that many of the challenges identified cannot be addressed by individual organisations acting alone.

Training capacity and capability

As electricity network investment accelerates, demand for technical, engineering, digital and leadership skills is expected to increase significantly. Action is already being taken to increase the availability of qualified trainers and assessors.

Work is under way to map electricity transmission training facilities, including cataloguing all major training facilities, resources and content currently used by the sector. This activity will be completed in 2026/27.

As part of the Growth Plan delivery, industry partners will agree ambitious workforce and training targets, working collectively to expand training capacity and capability across the sector. This commitment will help to ensure that the benefits of network investment are felt across the country, creating skilled jobs and career opportunities in communities throughout the UK.

Aligning standards and requirements

The scale of future electricity network investment will require a workforce that can move more efficiently between organisations, projects and regions.

Differences in training standards, assessment requirements and qualification recognition can create barriers to workforce mobility and lead to unnecessary duplication of training and assessment. To address this, the sector will explore opportunities to improve consistency by developing common occupational standards. This will support better use of available skills, increase workforce flexibility and improve productivity across the sector.

Workforce planning and resilience

The long-term nature and scale of future electricity network investment mean that workforce planning must become increasingly strategic, coordinated and evidence-led. Better workforce intelligence, forecasting and resilience measures can help to identify emerging risks, improve decision-making and strengthen long-term workforce planning across the sector.

Building on the workforce planning framework and collaborative processes already developed across the sector, the sector will adopt a consistent, forward-looking approach to workforce planning and resilience. This will deliver robust labour-market intelligence, regular workforce assessments, multi-year visibility of work programmes, and mechanisms to identify and mitigate emerging workforce risks.

Policy and regulation

Policy decisions, regulatory frameworks, funding mechanisms and education systems all influence the sector's ability to attract, develop and retain talent. Greater alignment between these areas can help remove barriers to workforce growth, improve the effectiveness of existing initiatives and create the conditions required for long-term investment in skills and capability. In turn, this enables employers to respond more quickly to changing workforce requirements.

The sector will engage proactively with the UK Government and other policymakers to ensure that effective immigration pathways are available to help meet the very limited and immediate-term requirement for skilled and experienced workers.

Case study:

Innovation isn't optional: driving faster, smarter delivery across the network

Britain needs significant new energy infrastructure to support a growing, increasingly electrified economy. But building more is only part of the answer. Innovation is already helping National Grid get more from existing infrastructure, unlocking capacity sooner, reducing delivery risk and lowering costs for consumers.

Dynamic Line Rating, including technology from LineVision, uses sensors and real-time weather data to show how much power existing transmission lines can safely carry. Releasing this extra capacity has saved consumers around £20 million in constraint costs over the past five years, with a further £50 million in savings expected over the next five.

Innovation is also changing how new infrastructure is delivered. Uxbridge Moor will connect more than a dozen new data centres, providing around 1.8GW of new capacity. Its indoor gas-insulated design cuts the site's footprint by around 70%, and it is among the first substations of its kind in the country to be free of SF6, a potent greenhouse gas.

Exodigo uses AI and advanced sensors to map what lies underground before construction begins, helping avoid delays and rework. Drone and AI inspection from Keen.AI and sees.ai is enabling faster, safer assessment of asset condition.

National Grid is also testing new ways to connect customers sooner. Through the partnership with Celtic Freeport and Net Zero Industry Wales, National Grid is exploring whether network-controlled batteries could support more local power production, release capacity and allow businesses in South Wales to connect earlier, supporting investment and jobs.

Together, these examples show why innovation is fundamental to the energy transition. It helps build the new infrastructure Britain needs while getting more from the network already in place, supporting the growth this plan sets out to achieve.



Case study:

GE Vernova's 130+ years in the UK

With a history of 130+ years in the UK, GE Vernova has around 3,500 employees across 11 sites, and >30K MW of UK electricity is generated by our equipment.

Stafford is home to one of the UK's only large-scale high-voltage grid manufacturing facilities: GE Vernova's transformer manufacturing site. The Stafford facilities have recently received investment to expand manufacturing operations across two key sites in the Electrification Systems' Grid Solutions business. At the Redhill HVDC facility, we are installing an additional Voltage-Sourced Converter (VSC) valve assembly line, which is expected to double valve manufacturing capacity. At the Lichfield Road transformer facility, major upgrades are under way to increase production of HVDC converter transformers, which are essential for integrating offshore wind power into the grid.

To support this growth, GE Vernova is actively hiring and expects to create around 600 new jobs in the UK, including engineering and skilled roles in assembly and testing. This investment will strengthen our ability to support large-scale renewable energy projects worldwide and help accelerate the UK's energy transition.



Deliver the workforce of tomorrow

Action 8: Place good quality jobs and fair work at the heart of the sector's ambition

Employer value proposition

The electricity networks sector plays a critical role in delivering economic growth and energy security, yet awareness of the opportunities available remains low compared to many competing sectors.

Attracting the workforce required for future investment will depend on the sector's ability to articulate a compelling proposition to existing and future workers, helping to improve recruitment and retention outcomes, attract talent from a broader range of backgrounds and career stages, and support the development of a larger and more diverse workforce.

A compelling value proposition should demonstrate why electricity networks should be the industry of choice - clearly communicating the breadth and quality of opportunities that exist in the industry, and that it is a fair and equitable employer offering a wide range of good quality jobs.

Employee retention

Meeting future workforce requirements is not solely a recruitment challenge. Retaining experienced workers, improving workforce productivity and ensuring critical knowledge is transferred to the next generation will be equally important.

The electricity networks sector possesses significant technical expertise and operational experience, much of which has been developed over decades. As workforce demographics change and experienced workers approach retirement, there is a growing need to preserve and transfer this capability whilst also creating more productive ways of working. At the same time, organisations must continue creating working environments and cultures that support retention, innovation and continuous development.

Modernised working practices

We will seek innovative ways to modernise our ways of working, ensuring these are integral to the outcome of sector growth, delivered through a co-ordinated programme of actions that make careers visible, stable and accessible while improving retention and workforce wellbeing.

Actions in this space include expanded mentoring and trainer roles, modernised working practices to support productivity and flexibility, and monitoring of wellbeing within the workforce. This includes working with government to lead the development of an energy industry Good Work Standard and champion its adoption.

Deliver the workforce of tomorrow

Action 9: Create and spread opportunity across the country

Create sector awareness

A co-ordinated entry point (a ‘front door’) into electricity networks careers will provide a clearer and more accessible route into the sector, helping to raise awareness, broaden participation and strengthen long-term workforce pipelines.

A single entry point will package clear careers information, unified branding and mapped pathways to make electricity networks careers visible and accessible. The Sector Platform is currently in the scoping phase, with development expected to begin in late 2026.

This will sit alongside existing attraction initiatives, including the Moving the Grid Forward and Destination Energy campaigns, creating a more coordinated approach to raising awareness of career opportunities across the sector. Employers will also continue to strengthen engagement with schools, colleges and universities to build future talent pipelines.

Expand opportunities to under-represented groups and those from other sectors

To widen participation, improve social mobility and build the future workforce at the scale required, there must be targeted local and regional attraction activity to direct candidates into defined career routes.

New measures to expand sector entry, increase apprenticeships to a potential cohort of around 6,000 new starts over the next decade, and develop high-quality work placements and training will enable unemployed people, NEETs, career changers, ex-forces personnel, returners and other under-represented groups to access employment opportunities.

The Growth Partnership will also work with the North Sea Jobs Service to ensure oil and gas workers have the opportunity to move into the networks sector to help build the workforce the sector needs.





Deliver the workforce of tomorrow

Action 10: Establish centralised training for network-critical professions

A small number of highly specialised professions are critical to the delivery of future electricity network investment, but may not be developed at the scale and pace required through existing market arrangements alone. These roles typically require long training lead times, sector-specific qualifications and significant practical experience before individuals can operate independently. Shortages in these professions could therefore become a direct constraint on delivery, increasing project costs, delaying network investment and reducing the consumer and economic benefits associated with the Sector Growth Plan.

The Growth Partnership will explore the opportunity to establish a dedicated programme to coordinate training and workforce development for a defined set of network-critical professions. This will include identifying the professions in scope, quantifying future demand, assessing existing training capacity and putting in place the delivery arrangements needed to ensure training volumes are aligned with long-term sector requirements. The purpose would not be to replace employer-led training, but to address a targeted coordination challenge where collective workforce need exceeds the level of investment that individual organisations can justify on their own.

Looking ahead

The expansion of Great Britain's electricity networks is one of the defining economic opportunities of our generation. This plan shows how we can do more than build the infrastructure required for a cleaner energy system. We can use this investment to support skilled jobs, strengthen domestic manufacturing, improve energy security and create lasting economic value in every region of the UK.

The opportunity is significant: up to £181 billion of network investment, more than 210,000 jobs supported, £58 billion of GVA for the UK economy and the potential for up to 72p in every pound invested to flow through UK businesses, workers and communities.

These outcomes are not guaranteed. The Electricity Networks Growth Partnership will provide the leadership, coordination, accountability and transparency needed to turn ambition into action, driving delivery, monitoring progress and overcoming barriers to growth. Through this partnership, the sector will work collectively to maximise the economic benefits of network investment, strengthen UK supply chains, create good jobs and deliver lasting benefits for consumers, communities and businesses across Great Britain.

The foundations are already being laid. The task now is to deliver at pace, work together and turn ambition into action. If we do, Great Britain will not only build the networks needed for the future, but also strengthen its industrial base, create opportunities for communities across the country and establish itself as a global leader in electricity networks for decades to come.



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