ENERGY & UTILITY SKILLS

Workforce demand estimates – 2026 to 2032
Gas Networks

Summary report
November 2026



Workforce demand estimates – 2026 to 2032

Gas Networks

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Gas Networks 2026 – 2032

Skills to deliver the UK's future

ENERGY & UTILITY SKILLS

Turning workforce evidence into action for a resilient gas networks sector.

Our ambition
A resilient gas networks sector that keeps the UK healthy, supports growth and protects the environment.

Our Growth
Creating jobs, skills and investment to deliver vital infrastructure across the UK.

Our Opportunity
Good careers. Stronger communities. A cleaner, greener future.

Research
Trusted evidence for action renewed every two years.

Core requirement of **11,900** **people by 2032**

37% of the current workforce

Robust workforce evidence to guide investment and delivery.

- Credible, transparent forecasts and methodology.
- A consistent framework for monitoring industry progress and the accuracy of our forecasts.
- Insight across sub-industries, geographies, skill levels and occupations.

Trusted insights to inform decisions today and tomorrow.

Attract
Bring new people into the industry.

We forecast **7,200** **new jobs by 2032**

23% growth in total employment

That's around **1,000** new jobs each year.

- More apprenticeships and training opportunities.
- A diverse and inclusive workforce.
- Rewarding, meaningful careers.

Attracting new talent is essential to deliver a safe, reliable and resilient gas networks sector.

Develop
Grow skills and embrace new technology.

Core requirement of **3,400** **at RQF 3/SCQF 6 by 2032**

35% of the current workforce

Split across 2,300 in technical occupations and 1,100 in business support occupations.

- Increase productivity through innovation and technology.
- The adoption of AI and automation could reduce the core requirement by up to 520 people

A more productive, higher skilled workforce that can deliver more.

Retain
Keep and develop our talented people.

We expect **4,700** **retirements by 2032**

That's **15%** of today's workforce – around **700** people each year

- Improve job quality, health, safety and well-being.
- Create clear career pathways and progression.
- Through continuous improvement in workforce retention the industry could mitigate the effect of normal staff turnover by up to **7,000 people**.

Retaining our people protects expertise, builds stronger teams and keeps the sector moving forward.

Real economic impact. Stronger communities.

Growth as a % of current workforce
Wales = **45%**
Northern Ireland = **29%**
England = **21%**
Scotland = **13%**

7,200 new jobs could create **£293 million** of additional earnings.

By 2032, total GVA could reach between **£12 billion** and **£21 billion.**

1 About this report

1.1 Introduction

1.1.1 This report is one in a series that contain current workforce estimates and forecasts for the number of new jobs and people required across the UK energy and utilities sector between 2026 and 2032 inclusive, including:

- **Energy and utilities sector** (containing the aggregate analysis from across all six industries of the sector)
- **Community & domestic low carbon technologies** (including community and district heating, and the installation and repair of domestic gas boilers, heat pumps, smart meters, solar PV and battery storage and EV chargepoints)
- **Electricity networks** (including electrical equipment manufacturing, construction and installation, operation and maintenance and the trade of electricity)
- **Gas networks** (including the manufacture, distribution, construction of gas utility projects and retail trade of gas through the networks)
- **Power generation** (including thermal power and clean energy technologies)
- **Waste and recycling** (including the collection, treatment, disposal and recycling of waste)
- **Water and wastewater** (including the collection, treatment and supply of water; sewerage; the construction of water assets)

1.1.2 This report focuses on the UK's gas networks industry, which includes:

- Manufacture of gas
- Distribution of gas
- Construction of gas utility projects
- Trade of gas

1.1.3 This industry is defined by a series of Standard Industrial Classifications, which can be found in Annex 2.

1.2 From workforce evidence to strategic action

1.2.1 This report provides a factual estimate of the workforce required by the UK Gas Networks industry between 2026 and 2032. Its central purpose is to identify the gap between the number and mix of people the industry will require and the workforce available to meet that requirement.

1.2.1 The findings support the four pillars of the Energy and Utilities Skills Strategy 2025-2030[1] in distinct ways:

- **Research** provides the definitions, evidence, methodology and update cycle that make the estimates credible
- **Attract** identifies the core requirement for additional jobs and replacement of people retiring from the workforce
- **Develop** considers how productivity, artificial intelligence, automation and new working methods could reduce or reshape that requirement
- **Retain** shows how movement out of the industry could increase the number of new people who must be recruited.

1.2.2 These pillars are not separate forecasts. **Attract** provides the central workforce requirement, while **Develop** and **Retain** test the factors that could move it. **Research** establishes the credibility of the forecasts.

[1] https://euskills.co.uk/about/our-strategy/

2 Industry headlines

Figure 1: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032

Sub-Industry	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
Manufacture of Gas	2,000	7,000	5,000	*250%*	600	*29%*	5,600	*279%*	800
Distribution of Gas	21,000	23,000	2,000	*10%*	3,000	*14%*	5,000	*24%*	700
Construction of Gas Utility Projects	1,500	2,700	1,200	*80%*	300	*20%*	1,500	*100%*	200
Trade of Gas	7,500	6,500	-1,000	*-13%*	800	*11%*	-200	*-2%*	0
Gas Networks	**32,000**	**39,200**	**7,200**	*23%*	**4,700**	*15%*	**11,900**	*37%*	**1,700**

Note: Figures may not sum to the grand total due to rounding.

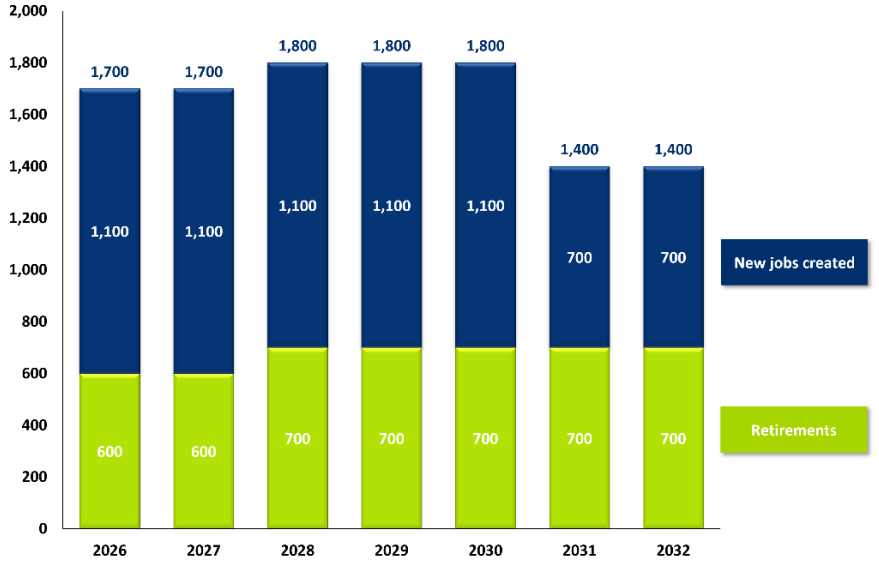
2.1 Attract: The core workforce requirement

2.1.1 Gas Networks has a core requirement for 11,900 people by 2032, equivalent to 37% of the current workforce. Employment is projected to grow by 7,200 jobs (23%), while a further 4,700 people will be required due to retirements.

2.1.2 Annual workforce demand remains relatively stable at 1,700–1,800 people per year between 2026 and 2030, before falling to 1,400 people in 2031 and 2032.

2.1.3 New job creation is the main driver of workforce demand, remaining at 1,100 people per year between 2026 and 2030 before falling to 700 in 2031–2032. Retirements remain comparatively stable at 600–700 people per year, meaning workforce renewal accounts for a larger share of demand towards the end of the period.

Figure 2: Core requirement for people by year and cause



Note: Figures may not sum to the grand total due to rounding.

2.2 Develop: Potential impact of artificial intelligence and automation on 'At Risk of Reduction' occupations

2.2.1 Section 3 below systematically assesses how artificial intelligence, automation and associated technologies might affect workforce demand across individual occupations. It applies low, medium and high adoption scenarios across seven dimensions of technological adoption and classifies each occupation according to whether workforce demand is *At Risk of Reduction, Significantly Impacted, Augmented* or subject to *Limited Impact*.

2.2.2 The following occupations are *At Risk of Reduction* in their core workforce requirements as a result of these new technologies:

- 71 - Sales Occupations
- 72 - Customer Service Occupations
- 41 - Administrative Occupations
- 42 - Secretarial and Related Occupations
- 92 - Elementary Administration and Service Occupations
- 34 - Culture, Media and Sports Occupations
- 62 - Leisure, Travel and Related Personal Service Occupations

2.2.3 Together, these occupations have a core requirement of 2,600 people by 2032, equivalent to 22% of the overall core requirement. This identifies the part of the forecast most exposed to potential workforce demand reduction; it does not imply that the core requirement for people by 2032 could be reduced by 2,600.

2.2.4 Our analysis indicates that the potential impact of AI and automation on the *At Risk of Reduction* occupations (listed in paragraph 2.3.2 above) could be:

- 80 people under the low adoption scenario (equivalent to a reduction of up to 3%)
- Between 100–260 under the medium adoption scenario (equivalent to a reduction of between 4% to 10%)
- Between 290-520 under the high adoption scenario (equivalent to a reduction of between 11% to 20%)

2.2.5 These are illustrative sensitivity assumptions rather than forecasts of job losses.

2.2.6 Section 3 presents the detailed occupation-level assessment under each adoption scenario, with the full analytical framework set out in Annex A2.4.

2.3 Retain: Replacement demand sensitivity

2.3.1 In addition to the core requirement for people based on new job creation and retirements, we must consider the extent to which people might leave the workforce in order to take up employment in other sectors of the economy (or move overseas).

2.3.2 For this analysis we have not included any vacancies that may be created by one person leaving their job in the Gas Networks industry and taking up another position within the same industry.

2.3.3 As detailed in Annex 2.2, we have assumed a proportion of the workforce will leave each year for reasons other than retirement – these annual proportions range from 2% to 5% depending on the occupation.

2.3.4 In total, in addition to the core requirement for 11,900 people by 2032, an additional 7,000 people may be needed to fill vacancies by those who leave the workforce for other reasons

Figure 3: Potential additional vacancies (over-and-above the core requirement)

Sub-Industry	Number	*% of current workforce*
Manufacture of Gas	900	*46%*
Distribution of Gas	4,100	*20%*
Construction of Gas Utility Projects	400	*24%*
Trade of Gas	1,600	*21%*
Gas Networks	**7,000**	***22%***

Note: Figures may not sum to the grand total due to rounding.

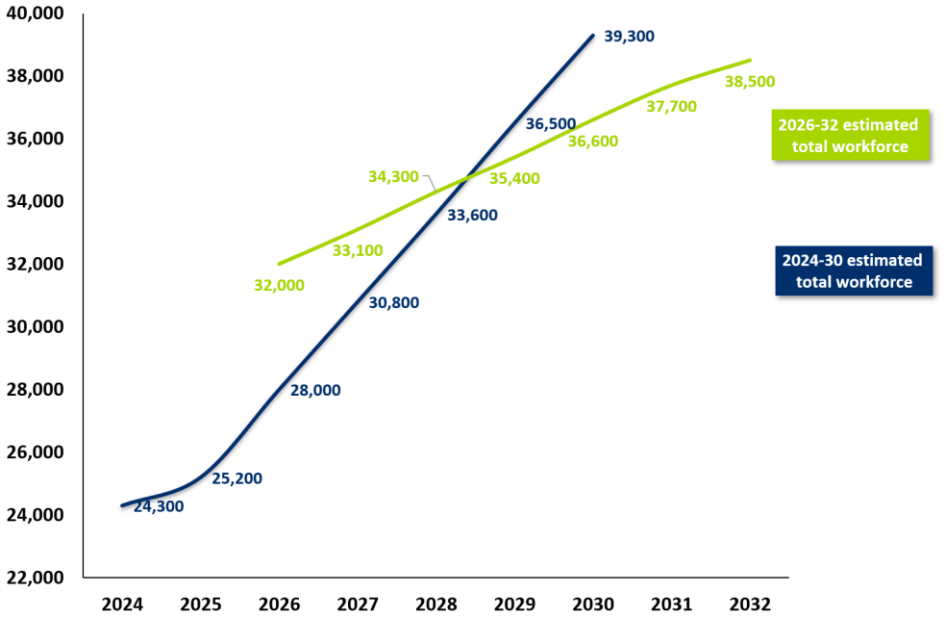
2.3.5 The challenge for the industry will be to minimise these additional vacancies, while recognising that some level of staff turnover is generally considered positive in terms of bringing in a diversity of people, experiences and ideas. Commitment 3: Retain experience and widen access to opportunity in the Call to Action below provides further information on how the sector might achieve improvements in workforce retention.

2.4 Research: Maintaining the credibility of these forecasts

2.4.1 These workforce demand estimates were published for the first time in 2024 and will be updated every two years.

2.4.2 In order to assess how our forecasts of workforce growth have changed since our 2024 forecasts, the figure below presents our latest forecasts side-by-side.

Figure 4: Forecast total workforce for 2026-32 compared to 2024-30 forecast

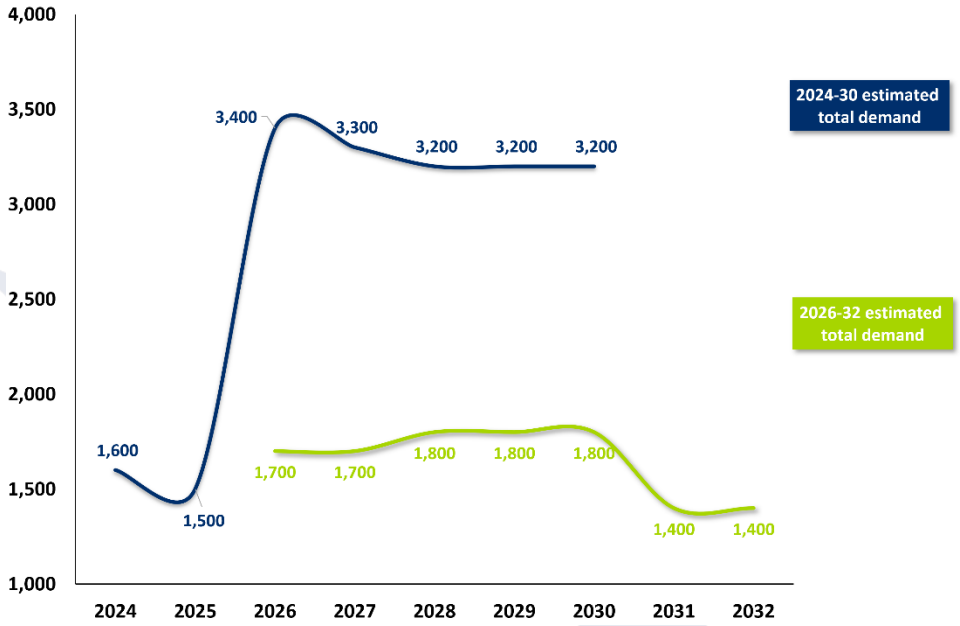


2.4.3 The higher workforce levels estimated in 2026 are because of (i) employment growth seen across the manufacture, distribution and trade of gas sub-industries and (ii) the addition of 1,500 workers employed in the construction of gas utility projects supply chain.

2.4.4 However, our forecast of future employment is now more conservative than previously reported due to (i) lower estimates of hydrogen production and networks than previously reported and (ii) more conservative forecasts of both the distribution and construction workforces over the coming years.

2.4.5 This is reflected in the forecasts of the total demand for people, where the 2026 to 2030 forecast is now more conservative. The drop in forecast demand after 2030 reflects the end of the GT/GD3 price control period.

Figure 5: Forecast total demand for 2026-32 compared to 2024-30 forecast



2.4.6 Our aim, wherever possible, is to improve the accuracy of these workforce demand estimates with each update.

2.5 Nations and regions

2.5.1 England accounts for the majority of the Gas Networks workforce requirement, requiring 8,900 of the 11,900 people needed by 2032.

2.5.2 Wales faces the greatest relative workforce challenge, with a core requirement for 1,700 people, equivalent to 60% of the current workforce. This compares with 45% in Northern Ireland, 36% in England and 27% in Scotland.

2.5.3 Workforce demand varies considerably across the English regions. The East of England has the largest core requirement at 1,600 people, followed by the West Midlands (1,500), South East (1,400) and North West (1,300).

Figure 6: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by nation and region

Nation & Region	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
England	24,700	30,000	5,300	*21%*	3,600	*15%*	8,900	*36%*	1,300
Northern Ireland	500	700	200	*29%*	100	*16%*	200	*45%*	<100
Scotland	4,000	4,500	500	*13%*	600	*14%*	1,100	*27%*	200
Wales	2,800	4,000	1,200	*45%*	400	*15%*	1,700	*60%*	200
United Kingdom	**32,000**	**39,200**	**7,200**	***23%***	**4,700**	***15%***	**11,900**	***37%***	**1,700**
English regions									
East of England	2,100	3,300	1,200	*58%*	400	*17%*	1,600	*75%*	200
East Midlands	3,000	3,000	>-100	*-1%*	400	*12%*	300	*11%*	<100
London	2,500	2,900	400	*15%*	400	*14%*	700	*30%*	100
North East	100	300	200	*181%*	<100	*25%*	200	*206%*	<100
North West	4,000	4,700	700	*18%*	600	*15%*	1,300	*32%*	200
South East	3,900	4,700	800	*20%*	600	*15%*	1,400	*36%*	200
South West	1,700	2,200	500	*30%*	200	*15%*	800	*45%*	100
West Midlands	4,300	5,200	900	*20%*	600	*15%*	1,500	*35%*	200
Yorkshire & The Humber	3,100	3,700	700	*22%*	400	*14%*	1,100	*36%*	200

Note: Figures may not sum to the grand total due to rounding.

2.6 Skills and occupations

Skill levels

2.6.2 RQF 3 occupations have the largest core workforce requirement, requiring 3,400 people by 2032.

2.6.3 RQF 4–5 occupations face the greatest relative workforce pressure, with a core requirement for 2,500 people, equivalent to 59% of the current workforce. This is driven predominantly by 1,900 new jobs, alongside 500 retirements.

2.6.4 Demand is spread across all skill levels, with substantial requirements at RQF 3 (3,400), RQF 4–5 (2,500) and RQF 6 (1,800). Together, these levels account for 7,700 people, around 65% of the total core requirement.

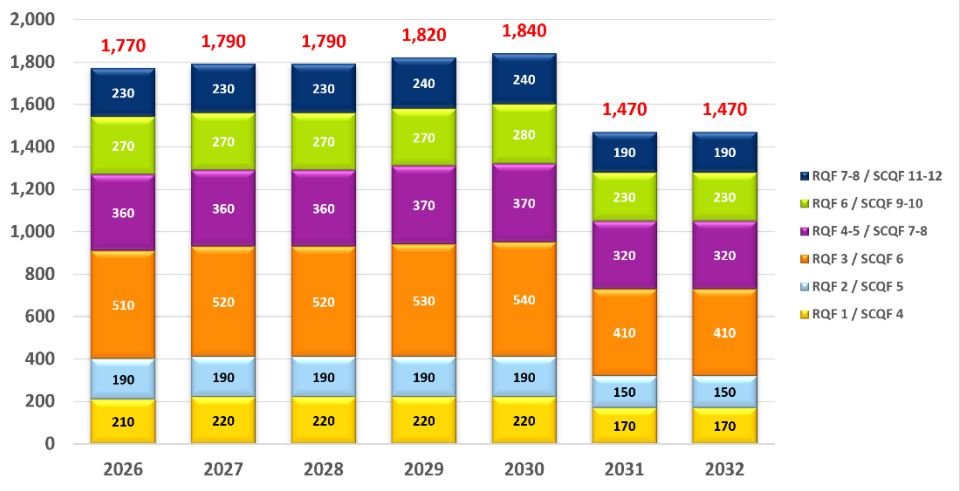
Figure 7: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by skill level

RQF/SCQF Level	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
RQF 7-8 SCQF 11-12	3,800	4,700	800	*22%*	700	*18%*	1,500	*40%*	200
RQF 6 SCQF 9-10	4,800	6,100	1,300	*26%*	500	*11%*	1,800	*38%*	300
RQF 4-5 SCQF 7-8	4,200	6,100	1,900	*46%*	500	*13%*	2,500	*59%*	400
RQF 3 SCQF 6	9,800	11,700	1,900	*19%*	1,600	*16%*	3,400	*35%*	500
RQF 2 SCQF 5	5,500	6,100	700	*12%*	600	*10%*	1,200	*23%*	200
RQF 1 SCQF 4	3,900	4,500	600	*16%*	800	*21%*	1,400	*37%*	200
Gas Networks	**32,000**	**39,200**	**7,200**	***23%***	**4,700**	***15%***	**11,900**	***37%***	**1,700**

Note: Figures may not sum to the grand total due to rounding.

2.6.5 The next figure breaks these annual numbers down by skill level.

Figure 8: Core requirement for people by skill level and year



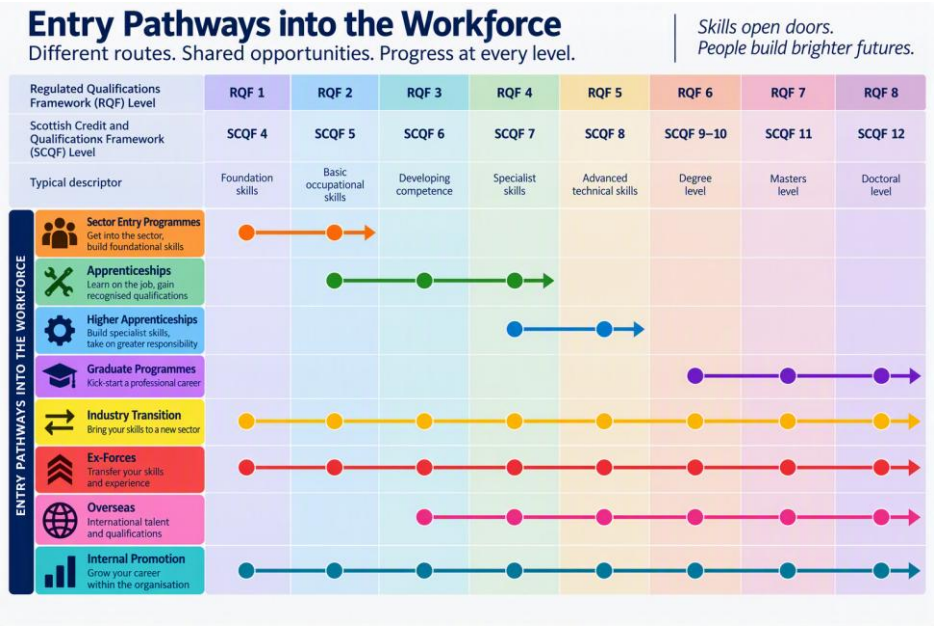
Note: Figures may not sum to the grand total due to rounding.

2.6.6 The entry pathways into the workforce will vary depending upon the skill level of the occupation. Each entry pathway will have its unique characteristics in terms of lead-time to competency and entry point into the workforce.

2.6.7 At skill levels 1 and 2 (4-5 in Scotland), sector entry-type programmes could provide an immediate solution. At skill levels 3-5 (6-8 in Scotland), a number of entry pathways may be appropriate, but lead-times to competency will determine the extent to which they are able to satisfy immediate demands (e.g. with training lead-times of 3 years+ for an apprentice (and the associated need for trainers, assessors and mentors), increasing the volume in the pipeline now will not produce positive outcomes until the turn of the decade).

2.6.8 Transitioning in experienced workers from other sectors will be a priority, as will developing the existing workforce and enabling career progression via internal promotions. However, this process cannot be rushed to point where people are promoted prematurely.

Figure 9: Potential entry pathways into the workforce



2.6.9 Industry will make use of range of different recruitment and training pathways, providing a balanced approach to meeting both short-term and longer-term demands for people.

Occupations

2.6.10 This analysis is based on UK's Standard Occupational Classification system at the two-digit – sub-major group – level.

2.6.11 All our estimates and forecasts have been broken down by 26 occupations – based on the two-digit Standard Occupational Classification taxonomy. Furthermore, these have been grouped into five occupational groups (more information can be found in Annex 1 below):

- **Managerial**: Directors and functional managers
- **Technical Professional**: Typically, science and engineering professional engineers
- **Business Support**: Typically, roles including media, marketing, site security, and specialist roles such as quantity surveyor, estimator and procurement
- **Front Line Technical**: Typically, operative and craft level workers such as First Call Operative, Gas Network Operative, Main Layer, Service Layer, etc.
- **Other**: In the main, these occupations are generally not directly relevant to the core activities of the industry, but data collection processes may result in a small number of people being reported (e.g. nurses/first aiders, community development specialists, etc.).

2.6.12 Business Support occupations account for the largest share of workforce demand, requiring 5,000 people by 2032.

2.6.13 Front Line Technical occupations have the second-largest requirement, at 3,600 people, including 1,800 new jobs and 1,800 retirements.

2.6.14 Figure 11 below breaks down these broad occupational groups into 26 two-digit SOC.

Figure 10: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by broad occupational group

Broad Occupational Group	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
Managerial	3,800	4,700	800	*22%*	700	*18%*	1,500	*40%*	200
Technical Professional	3,900	5,200	1,300	*35%*	400	*11%*	1,800	*46%*	300
Business Support	13,900	17,100	3,200	*23%*	1,800	*13%*	5,000	*36%*	700
Front Line Technical	10,300	12,100	1,800	*17%*	1,800	*18%*	3,600	*35%*	500
Other	100	100	<100	*20%*	<100	*16%*	<100	*37%*	<100
Gas Networks	**32,000**	**39,200**	**7,200**	***23%***	**4,700**	***15%***	**11,900**	***37%***	**1,700**

Note: Figures may not sum to the grand total due to rounding.

Figure 11: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032by occupation

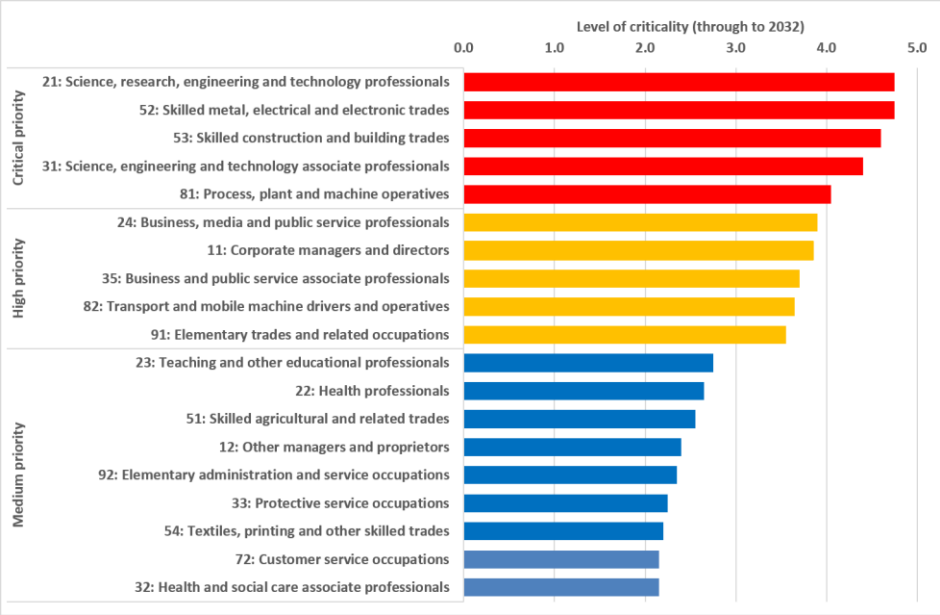
Skill level	Standard Occupation Classification (Sub-Major Group)	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	3,000	3,700	700	22%	600	18%	1,200	41%	200
	12 - Other Managers and Proprietors	800	1,000	200	22%	100	18%	300	40%	<100
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	2,700	3,300	600	21%	300	9%	800	30%	100
	22 - Health Professionals	0	0	0	--	0	--	0	--	0
	23 - Teaching and Other Educational Professionals	0	0	0	--	0	--	0	--	0
	24 - Business, Media and Public Service Professionals	2,100	2,800	700	33%	300	13%	1,000	47%	100
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	1,200	2,000	800	66%	200	15%	1,000	81%	100
	32 - Health and Social Care Associate Professionals	0	0	0	--	0	--	0	--	0
	33 - Protective Service Occupations	0	0	0	--	0	--	0	--	0
	34 - Culture, Media and Sports Occupations	100	200	100	250%	<100	20%	100	270%	<100
	35 - Business and Public Service Associate Professionals	3,000	4,000	1,000	34%	300	12%	1,400	46%	200
RQF 3 SCQF 6	41 - Administrative Occupations	2,500	3,100	600	24%	400	17%	1,000	41%	100
	42 - Secretarial and Related Occupations	200	300	<100	10%	100	22%	100	32%	<100
	51 - Skilled Agricultural and Related Trades	100	100	<100	10%	<100	28%	<100	38%	<100
	52 - Skilled Metal, Electrical and Electronic Trades	1,600	2,000	400	22%	200	15%	600	37%	100
	53 - Skilled Construction and Building Trades	5,300	6,100	900	17%	800	15%	1,700	32%	200
	54 - Textiles, Printing and Other Skilled Trades	0	0	<100	10%	<100	14%	<100	24%	<100
	61 - Caring Personal Service Occupations	100	100	<100	24%	<100	17%	<100	41%	<100
	62 - Leisure, Travel and Related Personal Service Occupations	0	0	0	--	0	--	0	--	0
	63 - Community and Civil Enforcement Occupations	0	0	0	--	0	--	0	--	0
RQF 2 SCQF 5	71 - Sales Occupations	700	700	<100	6%	100	13%	100	20%	<100
	72 - Customer Service Occupations	4,700	5,300	600	13%	500	10%	1,100	23%	200
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	1,800	2,000	200	10%	300	18%	500	28%	100
	82 - Transport and Mobile Machine Drivers and Operatives	1,400	1,700	300	21%	400	26%	700	47%	100
	91 - Elementary Trades and Related Occupations	100	200	100	76%	<100	22%	100	98%	<100
	92 - Elementary Administration and Service Occupations	600	700	100	11%	100	15%	200	26%	<100
Gas Networks		32,000	39,200	7,200	23%	4,700	15%	11,900	37%	1,700

Note: Figures may not sum to the grand total due to rounding.

2.6.15 In order to assess how critical each occupation is to the success of the industry through to 2032, we have developed a criticality framework based on 11 criteria. Further details of this methodology can be found in Annex 2.

2.6.16 The figure below ranks each of the above occupations in terms of their level of priority through to 2032 based on a range of eleven criteria (including taking into account each occupation's importance to delivery and level of shortage in the UK) – those ranked as low priority are not shown.

Figure 12: Forecasted level of occupational criticality through to 2032



2.6.17 Five occupations are ranked as critical:

- 21: Science, research, engineering and technology professionals
- 52: Skilled metal, electrical and electronic trades
- 53: Skilled construction and building trades
- 31: Science, engineering and technology associate professionals
- 81: Process, plant and machine operatives

2.6.18 These occupations are likely to be major constraints on infrastructure delivery by 2032 because they combine high delivery criticality, existing shortages, long training lead times, regulatory importance and limited scalability. It is likely that immediate intervention is required, including targeted workforce strategies, apprenticeships, retraining programmes, recruitment campaigns and supply-chain action.

2.6.19 By 2032, these five critical occupations will employ an additional 2,900 people and need to attract 4,600 new people to enter their workforces.

2.6.20 Five occupations are ranked as high priority:

- 24: Business, media and public service professionals
- 11: Corporate managers and directors
- 35: Business and public service associate professionals
- 82: Transport and mobile machine drivers and operatives
- 91: Elementary trades and related occupations

2.6.21 These occupations present a significant workforce risk and are likely to experience recruitment pressure but are not expected to be a critical bottleneck across the industry. Active monitoring and targeted interventions are required.

2.6.22 By 2032, these five high-priority occupations are forecast to account for 2,800 new jobs and a core requirement for 4,400 people.

2.6.23 In total, some 5,700 new jobs will be created in occupations that are either critical or high priority occupations; requiring more than 9,000 new people to enter their workforces.

2.6.24 Furthermore, we have applied this same methodology to a more detailed taxonomy of occupations – the four-digit Unit Group of occupations.

2.6.25 Nine detailed occupations have been identified as being a critical priority for the gas networks industry over the next seven years. These are listed in the figure below, along with estimates of the current and future workforce, new jobs created and the core requirement for people.

2.6.27 Plumbers and heating and ventilating engineers have the largest core requirement of 1,200.

Figure 13: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 in critical priority occupations (four-digit Unit Group)

Skill level	Standard Occupation Classification (Unit Group)	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 3 SCQF 6	5315 – Plumbers and heating and ventilating engineers	3,800	4,400	600	*16%*	600	*16%*	1,200	*32%*	200
RQF 4-5 SCQF 7-8	3113 - Engineering technicians	400	700	300	*75%*	100	*25%*	400	*100%*	100
RQF 6 SCQF 9-10	2121 - Civil engineers	500	600	100	*20%*	100	*20%*	200	*40%*	<100
RQF 6 SCQF 9-10	2123 – Electrical engineers	400	500	100	*25%*	0	--	100	*25%*	<100
RQF 3 SCQF 6	5330 – Construction and building trades supervisors	1,100	1,300	200	*18%*	200	*18%*	400	*36%*	100
RQF 6 SCQF 9-10	2455 - Construction project managers and related professionals	300	500	200	*67%*	0	--	200	*67%*	<100
RQF 6 SCQF 9-10	2129 – Engineering Professionals n.e.c	600	700	100	*17%*	100	*17%*	200	*33%*	<100
RQF 4-5 SCQF 7-8	3581 – Inspectors of standards and regulations	300	500	200	*67%*	0	--	200	*67%*	<100
RQF 6 SCQF 9-10	2440 – Business and financial project management professionals	400	600	200	*50%*	100	*25%*	300	*75%*	<100
Gas Networks – Critical priority detailed occupations		**6,700**	**8,500**	**1,800**	***27%***	**1,000**	***15%***	**2,800**	***42%***	**400**

Note: Figures may not sum to the grand total due to rounding.

2.6.26 These critical detailed occupations are forecast to grow by 1,800 jobs and have a core requirement of 2,800 by 2032.

3 Impact of artificial intelligence and automation on workforce demands

3.1.1 The gas network industry is increasingly exploring the use of AI, machine learning and advanced analytics to improve network monitoring, pressure management and asset management. Through its Intelligent Gas Grid programme, SGN is developing automated pressure-management systems, machine-learning forecasting tools and anomaly-detection capabilities that use near real-time network data to support network optimisation, maintenance planning and more efficient operation of gas distribution networks.[2]

3.1.2 Gas network operators are increasingly deploying network sensors, remote monitoring systems and advanced analytics to improve visibility of network conditions. AI and machine-learning models are being developed to support demand forecasting, anomaly detection and more data-driven approaches to operational decision-making.[3]

3.1.3 The gas networks industry is undergoing a broader digital transformation through increased investment in data infrastructure, digital platforms, analytics and interoperability. Cadent identifies advanced analytics, digital-enabled decision making and enhanced data sharing as key priorities for RIIO-3, supporting more efficient and responsive network operations.[4]

3.1.4 Digital twins, advanced analytics and AI-enabled monitoring systems are increasingly being explored to support leak detection, fault diagnostics, asset management and scenario modelling. These technologies have the potential to improve visibility of network conditions and enable more predictive approaches to infrastructure management.[5]

3.1.5 AI and automation are expected to support a transition from reactive towards more predictive and data-driven network management. Machine-learning models can help identify asset deterioration, detect network anomalies, optimise pressure management and prioritise maintenance activity, enabling earlier intervention and more efficient operation of gas-network assets.

3.1.6 As a result, demand for skills is increasingly shifting towards:

- data skills;
- analytics;
- network monitoring and optimisation;
- digital systems management;
- predictive maintenance;
- digital decision support and forecasting.

[2] SGN Intelligent Gas Grid – Beta, Energy Networks Association

[4] Digitalisation Action Plan, Cadent, June 2026

[5] Digital twin for leak detection and fault diagnostics in gas pipelines, June 2025

3.1.7 Despite increasing use of AI and automation, large-scale workforce substitution is unlikely. Most gas-network activities continue to involve safety-critical decision-making, emergency response, physical infrastructure maintenance and regulatory compliance that require human intervention. Consequently, AI and automation are more likely to reshape job roles and skill requirements than significantly reduce overall workforce demand.

3.1.8 There are, however, roles which are highly exposed to automation. These include:

- **Network Controllers** — AI-enabled pressure-management systems, anomaly-detection tools and machine-learning forecasting models can automate elements of routine network monitoring, pressure management and operational diagnostics. This allows controllers to focus increasingly on exception management and safety-critical decision-making.
- **Leakage Technician/Leakage Surveyor** — Advanced sensors, leakage analytics platforms and AI-enabled monitoring systems can increasingly identify, locate and prioritise suspected gas leaks, reducing the need for routine manual surveying while improving targeting of field activities.
- **Maintenance Planner** — Machine-learning models, predictive analytics and digital asset-management systems can automate parts of maintenance forecasting, intervention prioritisation and work planning, enabling more proactive and data-driven maintenance strategies.
- **Asset Management Analyst** — AI-enabled risk modelling, condition assessment and asset-performance analytics can automate elements of asset-health evaluation, investment prioritisation and maintenance planning, shifting roles towards interpretation and assurance of model outputs.
- **Scheduler/Dispatch Coordinator** — AI-assisted workforce-allocation, scheduling and route-optimisation systems can automate routine planning and resource-assignment activities, enabling more efficient deployment of field teams and operational resources.

3.1.9 The following assessment considers how workforce demand may be affected under different levels of AI and automation adoption within the gas networks industry. Occupational groups have been classified according to their likely workforce-demand response to AI and automation adoption:

- **At Risk of Reduction** – Fewer workers may be required because AI and automation increase productivity and automate routine tasks.
- **Significantly Impacted** – Workforce demand remains broadly stable, but roles undergo substantial redesign as tasks, skills, responsibilities and workflows change significantly.
- **Augmented** – AI and automation improve productivity, decision-making and performance, but primarily enhance rather than redesign core roles, and demand for workers remains strong.
- **Limited Impact** – Little expected effect on workforce demand because activities continue to depend heavily on physical intervention, human interaction or site-based work.

3.1.10 Both *Significantly Impacted* and *Augmented* occupations are expected to experience widespread adoption of AI and automation. The key difference is that significantly impacted occupations are expected to undergo substantial job redesign, while augmented occupations primarily experience productivity and performance improvements with limited changes to the core nature of the role.

3.1.11 Low, medium and high adoption scenarios have been developed using a seven-dimension framework covering:

- investment and pace of adoption;
- technology maturity and autonomy;
- breadth of deployment;
- depth of workflow integration;
- task automation and augmentation;
- job redesign and skills transformation;
- productivity ambition.

3.1.12 These adoption scenarios describe the extent to which AI and automation are deployed within the industry. The occupational assessment then considers how different occupations may be affected under each adoption scenario.

3.1.13 The scenarios are intended to illustrate a range of plausible outcomes through to 2032 rather than predict a single future state:

- **Low Adoption** — AI and automation adoption remains relatively limited and focused on specific use cases. Organisations deploy individual tools for activities such as information retrieval, reporting, scheduling, basic analytics or administrative support, but these technologies are not extensively integrated into operational workflows. Most work continues to be undertaken using existing processes and workforce-demand impacts are limited.
- **Medium adoption** — AI and automation become mainstream across many organisations and functions. Proven technologies are integrated into business processes and support activities such as planning, monitoring, customer engagement, decision support and predictive maintenance. Roles and skill requirements begin to evolve, productivity improves and organisations increasingly use technology to redesign workflows and operating practices.
- **High adoption** — AI and automation are extensively embedded across organisational processes, operational activities and decision-making. Technologies are integrated with core systems, data and workflows, enabling significant automation, augmentation and workflow redesign. Organisations achieve substantial productivity gains and workforce demand is affected according to the exposure of the occupation group, with impacts ranging from workforce reduction in some roles to significant augmentation in others.

3.1.14 Potential workforce effects are assessed separately through the occupational risk categories and scenario analysis.

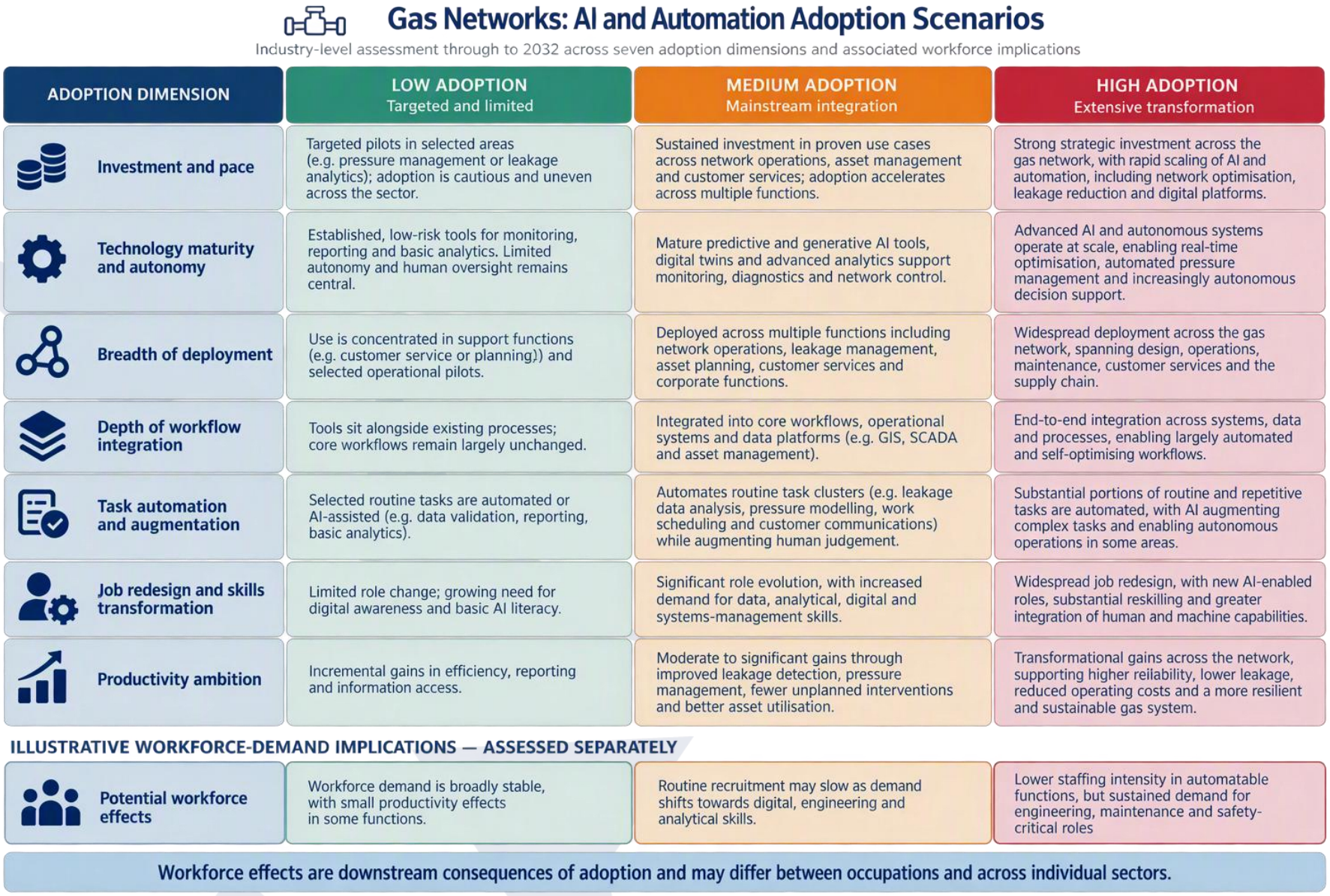
3.1.15 It is important to note that higher levels of AI and automation adoption do not automatically result in workforce reductions; impacts vary according to the characteristics of individual occupations and the extent to which tasks can be automated. Actual workforce outcomes will also depend on wider drivers including investment levels, regulatory requirements, infrastructure programmes, technological maturity and future demand for gas network services.

Figure 14: Assessment of AI and automation risk by occupation

Risk category	Standard Occupation Classification	Occupational Group	Adoption Scenarios		
			Low Adoption	Medium Adoption	High Adoption
At Risk of Reduction	71 - Sales Occupations 72 - Customer Service Occupations 41 - Administrative Occupations 42 - Secretarial and Related Occupations 92 - Elementary Administration and Service Occupations 34 - Culture, Media and Sports Occupations	Business Support	AI is used mainly for document management, reporting, scheduling and customer-service support. Most administrative activities remain human-led and workforce demand remains broadly stable.	AI is routinely used for customer enquiries, permitting administration, compliance documentation, reporting and work scheduling. Productivity improves while recruitment demand slows as routine tasks are increasingly automated.	AI is deeply integrated across customer service, compliance administration, reporting and workflow management. Automated processes, virtual assistants and AI-generated reporting significantly reduce routine support activities and lower staffing intensity.
	62 - Leisure, Travel and Related Personal Service Occupations	Other	AI supports content creation, communications and stakeholder-engagement activities. Human oversight remains central to most work.	Generative AI becomes widely used for communications, engagement materials, scheduling and content production. Routine support activities become increasingly automated.	AI automates large elements of communications production, marketing content and routine coordination activities, reducing demand for repetitive support work.
Significantly Impacted	24 - Business, Media and Public Service Professionals 35 - Business and Public Service Associate Professionals	Business Support	AI supports regulatory reporting, network-performance analysis, asset planning and project-support activities. Most professional judgement remains unchanged.	AI becomes embedded within pressure-management analysis, network planning, leakage analytics, operational forecasting and performance reporting. Roles increasingly focus on interpretation, validation and assurance.	AI undertakes significant portions of pressure-modelling, leakage analysis, forecasting, reporting and asset-prioritisation activities. Roles are redesigned around oversight, governance and decision-making, requiring substantial reskilling.
	54 - Textiles, Printing and Other Skilled Trades	Other	AI-assisted design, documentation and workflow-management tools support existing processes, with limited changes to role requirements.	Intelligent design and documentation systems automate routine production activities, increasing demand for digital and systems-management skills.	AI is integrated throughout production and technical-documentation workflows. Workers increasingly manage, verify and quality-assure machine-generated outputs rather than producing them manually.
	31 - Science, Engineering and Technology Associate Professionals	Technical Professional	AI supports condition monitoring, leak detection, technical reporting and asset-health assessments across gas-network infrastructure. Existing technician roles remain broadly unchanged.	Predictive maintenance, leakage analytics, digital twins and anomaly-detection systems become increasingly common. Technicians increasingly use AI to identify network issues and prioritise interventions.	AI is deeply integrated into network diagnostics, asset management and maintenance planning. Roles shift towards interpreting AI-generated insights and overseeing increasingly automated monitoring and decision-support systems.
	81 - Process, Plant and Machine Operatives	Front Line Technical	Automation mainly supports network monitoring, pressure management and operational reporting. Network controllers remain responsible for routine operational decisions.	AI-enabled pressure-management systems, anomaly-detection tools and demand-forecasting models become widespread across gas networks. Workers spend less time on routine monitoring and more time responding to AI-generated insights.	Automated pressure-management systems, digital twins, leakage analytics and advanced optimisation platforms significantly reshape operational roles. Workers increasingly manage exceptions, safety-critical interventions and system assurance rather than routine monitoring and operational control.

Risk category	Standard Occupation Classification	Occupational Group	Adoption Scenarios		
			Low Adoption	Medium Adoption	High Adoption
Augmented	11 - Corporate Managers and Directors 12 - Other Managers and Proprietors	Managerial	Managers use AI for reporting, operational monitoring and performance information retrieval. Decision-making remains largely unchanged.	AI supports pressure-management planning, leakage-reduction programmes, workforce allocation and maintenance prioritisation, enabling more data-driven management.	AI is embedded across pressure-management strategies, leakage-reduction planning, asset-performance management and regulatory reporting.
	21 - Science, Research, Engineering and Technology Professionals	Technical Professional	AI supports engineering analysis, asset reviews and network-performance assessments.	AI-enabled modelling, digital twins and advanced analytics improve pressure optimisation, biomethane integration, leakage reduction and maintenance planning.	AI is deeply embedded in network design, asset management, forecasting and operational optimisation. Productivity improves significantly while demand for engineering professionals remains strong.
	22 - Health Professionals 23 - Teaching and Other Educational Professionals 32 - Health and Social Care Associate Professionals	Other	AI supports training preparation, information management and administrative activities, with limited impact on workforce demand.	AI enhances workforce training, knowledge management and professional support activities, increasing demand for digital skills.	AI supports learning, skills analysis and workforce planning, making training and occupational-health activities more data-driven while workforce demand remains stable.
	33 - Protective Service Occupations	Business Support	AI supports site-security monitoring, surveillance and risk-detection activities, with limited changes to working practices.	Intelligent monitoring systems improve incident detection, threat identification and security management.	AI significantly improves monitoring, threat detection and incident-response coordination. Human judgement remains essential in safety-critical and regulated environments.
	51 - Skilled Agricultural and Related Trades 82 - Transport and Mobile Machine Drivers and Operatives 52 - Skilled Metal, Electrical and Electronic Trades	Front Line Technical	AI supports inspection planning, work scheduling, equipment monitoring and basic diagnostics. Most physical maintenance activities remain unchanged.	Predictive maintenance, AI-assisted diagnostics and workforce-optimisation tools improve efficiency across gas-network operations. Workers increasingly use digital decision-support tools.	AI enhances maintenance planning, condition monitoring, inspection scheduling and equipment diagnostics. Workers increasingly use AI-generated insights and automated monitoring systems, but physical maintenance, emergency response and field operations remain essential.
Limited Impact	53 - Skilled Construction and Building Trades 91 - Elementary Trades and Related Occupations	Front Line Technical	AI is limited to digital work instructions, scheduling tools and basic planning support, with little change to core physical work.	AI supports project planning, safety management and site coordination, but construction and site activities remain labour-intensive.	Physical construction, excavation, mains replacement and site-based work remain essential. AI improves productivity and safety but has limited impact on workforce demand.
	61 - Caring Personal Service Occupations 63 - Community and Civil Enforcement Occupations	Other	AI provides limited administrative support but has little influence on core activities.	Digital tools improve coordination and access to information, although work remains heavily dependent on human interaction and judgement.	Technology supports planning and information management but does not significantly alter workforce demand due to the inherently interpersonal nature of the work.

Figure 15: Assessment of AI and automation risk by occupation: Gas network AI and automation adoption scenarios



Gas Networks: AI and Automation Adoption Scenarios

Industry-level assessment through to 2032 across seven adoption dimensions and associated workforce implications

ADOPTION DIMENSION	LOW ADOPTION Targeted and limited	MEDIUM ADOPTION Mainstream integration	HIGH ADOPTION Extensive transformation
Investment and pace	Targeted pilots in selected areas (e.g. pressure management or leakage analytics); adoption is cautious and uneven across the sector.	Sustained investment in proven use cases across network operations, asset management and customer services; adoption accelerates across multiple functions.	Strong strategic investment across the gas network, with rapid scaling of AI and automation, including network optimisation, leakage reduction and digital platforms.
Technology maturity and autonomy	Established, low-risk tools for monitoring, reporting and basic analytics. Limited autonomy and human oversight remains central.	Mature predictive and generative AI tools, digital twins and advanced analytics support monitoring, diagnostics and network control.	Advanced AI and autonomous systems operate at scale, enabling real-time optimisation, automated pressure management and increasingly autonomous decision support.
Breadth of deployment	Use is concentrated in support functions (e.g. customer service or planning)) and selected operational pilots.	Deployed across multiple functions including network operations, leakage management, asset planning, customer services and corporate functions.	Widespread deployment across the gas network, spanning design, operations, maintenance, customer services and the supply chain.
Depth of workflow integration	Tools sit alongside existing processes; core workflows remain largely unchanged.	Integrated into core workflows, operational systems and data platforms (e.g. GIS, SCADA and asset management).	End-to-end integration across systems, data and processes, enabling largely automated and self-optimising workflows.
Task automation and augmentation	Selected routine tasks are automated or AI-assisted (e.g. data validation, reporting, basic analytics).	Automates routine task clusters (e.g. leakage data analysis, pressure modelling, work scheduling and customer communications) while augmenting human judgement.	Substantial portions of routine and repetitive tasks are automated, with AI augmenting complex tasks and enabling autonomous operations in some areas.
Job redesign and skills transformation	Limited role change; growing need for digital awareness and basic AI literacy.	Significant role evolution, with increased demand for data, analytical, digital and systems-management skills.	Widespread job redesign, with new AI-enabled roles, substantial reskilling and greater integration of human and machine capabilities.
Productivity ambition	Incremental gains in efficiency, reporting and information access.	Moderate to significant gains through improved leakage detection, pressure management, fewer unplanned interventions and better asset utilisation.	Transformational gains across the network, supporting higher reliability, lower leakage, reduced operating costs and a more resilient and sustainable gas system.
ILLUSTRATIVE WORKFORCE-DEMAND IMPLICATIONS — ASSESSED SEPARATELY			
Potential workforce effects	Workforce demand is broadly stable, with small productivity effects in some functions.	Routine recruitment may slow as demand shifts towards digital, engineering and analytical skills.	Lower staffing intensity in automatable functions, but sustained demand for engineering, maintenance and safety-critical roles

Workforce effects are downstream consequences of adoption and may differ between occupations and across individual sectors.

4 Sub-industry forecasts

4.1 Manufacture of gas

Figure 16: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by sub-industry

Sub-Industry	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
Gas Networks – Manufacture of Gas	**2,000**	**7,000**	**5,000**	***250%***	**600**	***29%***	**5,600**	***279%***	**800**

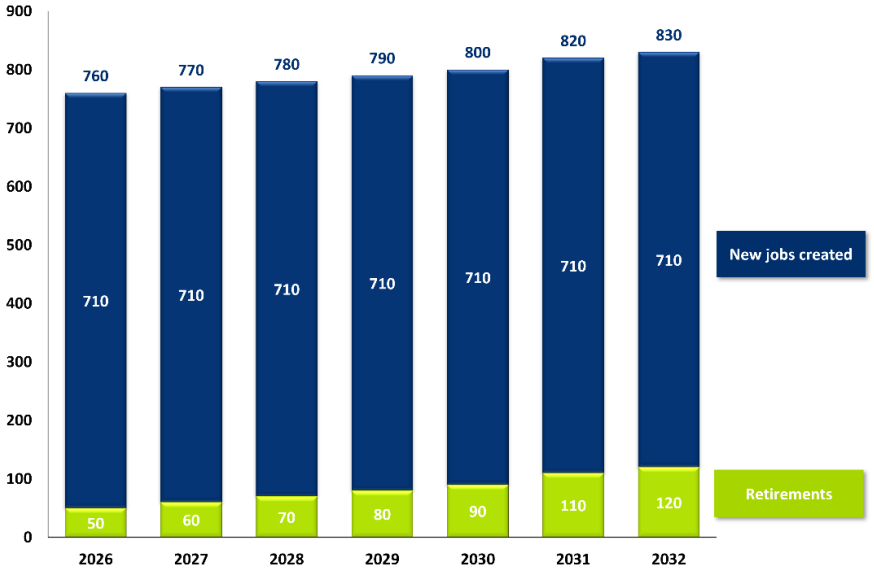
Note: Figures may not sum to the grand total due to rounding.

4.1.1 Manufacture of Gas faces a significant growth-led workforce challenge, with employment projected to increase from 2,000 to 7,000 by 2032, creating 5,000 new jobs (250% growth). Including 600 retirements, the core requirement reaches 5,600 people, equivalent to 279% of the current workforce.

4.1.2 Annual workforce demand increases gradually from 760 people in 2026 to 830 people in 2032.

4.1.3 New job creation is the main driver of workforce demand, remaining at around 710 people per year throughout the period. Retirements rise from 50 people in 2026 to 120 in 2032, increasing their contribution to overall demand over time.

Figure 17: Core requirement for people by year and cause



Note: Figures may not sum to the grand total due to rounding.

4.1.4 England accounts for the majority of demand, requiring 3,800 people by 2032. Wales has the second-largest requirement, at 1,400 people, reflecting its comparatively large share of the current manufacture of gas workforce.

4.1.5 Within England, the East of England has the largest requirement, at 1,000 people, followed by Yorkshire and the Humber at 700. The North West, South East, South West and West Midlands each require around 400 people.

Figure 19: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by nation and region

Nation & Region	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
England	1,400	4,800	3,400	*250%*	400	*29%*	3,800	279%	500
Northern Ireland	<100	100	100	*250%*	<100	*29%*	100	279%	<100
Scotland	100	300	200	*250%*	<100	*29%*	300	279%	<100
Wales	500	1,800	1,300	*250%*	200	*29%*	1,400	279%	200
United Kingdom	**2,000**	**7,000**	**5,000**	***250%***	**600**	***29%***	**5,600**	***279%***	**800**
English regions									
East of England	300	1,200	900	*250%*	100	*29%*	1,000	279%	100
East Midlands	<100	200	100	*250%*	<100	*29%*	100	279%	<100
London	100	300	200	*250%*	<100	*29%*	200	279%	<100
North East	100	300	200	*250%*	<100	*29%*	200	279%	<100
North West	100	500	400	*250%*	100	*29%*	400	279%	100
South East	100	500	400	*250%*	<100	*29%*	400	279%	100
South West	100	500	300	*250%*	<100	*29%*	400	279%	100
West Midlands	200	600	400	*250%*	100	*29%*	400	279%	100
Yorkshire & The Humber	300	900	700	*250%*	100	*29%*	700	279%	100

Note: Figures may not sum to the grand total due to rounding.

4.1.6 Business Support occupations have the largest core workforce requirement, requiring 2,700 people by 2032.

4.1.7 Technical Professional and Front Line Technical occupations have the next-largest requirements, at 1,200 and 1,100 people respectively. Together with Business Support, these three groups account for 5,000 people, around 89% of the total core requirement.

Figure 20: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by broad occupational group

Broad Occupational Group	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
Managerial	200	700	500	*250%*	100	*39%*	600	*289%*	100
Technical Professional	400	1,500	1,100	*250%*	100	*24%*	1,200	*274%*	200
Business Support	1,000	3,500	2,500	*250%*	300	*25%*	2,700	*275%*	400
Front Line Technical	400	1,300	900	*250%*	100	*38%*	1,100	*288%*	200
Other	<100	<100	<100	*250%*	<100	*36%*	<100	*286%*	<100
Gas Networks – Manufacture of Gas	**2,000**	**7,000**	**5,000**	***250%***	**600**	***29%***	**5,600**	***279%***	**800**

Note: Figures may not sum to the grand total due to rounding.

4.1.8 Figure 21 shows demand is concentrated in a small number of occupations:

- Business and Public Service Associate Professionals — 900 people
- Customer Service Occupations — 800 people
- Science, Engineering and Technology Associate Professionals — 700 people
- Skilled Construction and Building Trades — 600 people

Figure 21: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by occupation

Skill level	Standard Occupation Classification	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	200	600	400	250%	100	39%	500	289%	100
	12 - Other Managers and Proprietors	100	200	100	250%	<100	39%	200	289%	<100
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	200	600	400	250%	<100	20%	400	270%	100
	22 - Health Professionals	0	0	0	--	0	--	0	--	0
	23 - Teaching and Other Educational Professionals	0	0	0	--	0	--	0	--	0
	24 - Business, Media and Public Service Professionals	200	600	400	250%	<100	27%	500	277%	100
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	300	900	700	250%	100	26%	700	276%	100
	32 - Health and Social Care Associate Professionals	0	0	0	--	0	--	0	--	0
	33 - Protective Service Occupations	0	0	0	--	0	--	0	--	0
	34 - Culture, Media and Sports Occupations	100	200	100	250%	<100	20%	100	270%	<100
	35 - Business and Public Service Associate Professionals	300	1,100	800	250%	100	24%	900	274%	100
RQF 3 SCQF 6	41 - Administrative Occupations	100	500	400	250%	100	36%	400	286%	100
	42 - Secretarial and Related Occupations	0	0	0	--	0	--	0	--	0
	51 - Skilled Agricultural and Related Trades	0	0	0	--	0	--	0	--	0
	52 - Skilled Metal, Electrical and Electronic Trades	100	200	200	250%	<100	32%	200	282%	<100
	53 - Skilled Construction and Building Trades	200	800	500	250%	100	34%	600	284%	100
	54 - Textiles, Printing and Other Skilled Trades	0	0	0	--	0	--	0	--	0
	61 - Caring Personal Service Occupations	0	0	<100	250%	<100	36%	<100	286%	<100
	62 - Leisure, Travel and Related Personal Service Occupations	0	0	0	--	0	--	0	--	0
	63 - Community and Civil Enforcement Occupations	0	0	0	--	0	--	0	--	0
RQF 2 SCQF 5	71 - Sales Occupations	0	0	<100	250%	<100	31%	<100	281%	<100
	72 - Customer Service Occupations	300	1,100	800	250%	100	22%	800	272%	100
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	0	100	<100	250%	<100	41%	100	291%	<100
	82 - Transport and Mobile Machine Drivers and Operatives	100	200	200	250%	<100	56%	200	306%	<100
	91 - Elementary Trades and Related Occupations	0	0	<100	250%	<100	37%	<100	287%	<100
	92 - Elementary Administration and Service Occupations	0	0	0	--	0	--	0	--	0
Gas Networks – Manufacture of Gas		**2,000**	**7,000**	**5,000**	**250%**	**600**	**29%**	**5,600**	**279%**	**800**

Note: Figures may not sum to the grand total due to rounding.

4.2 Distribution of gas

Figure 22: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by sub-industry

Sub-Industry	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
Distribution of Gas	**21,000**	**23,000**	**2,000**	***10%***	**3,000**	***14%***	**5,000**	***24%***	**700**

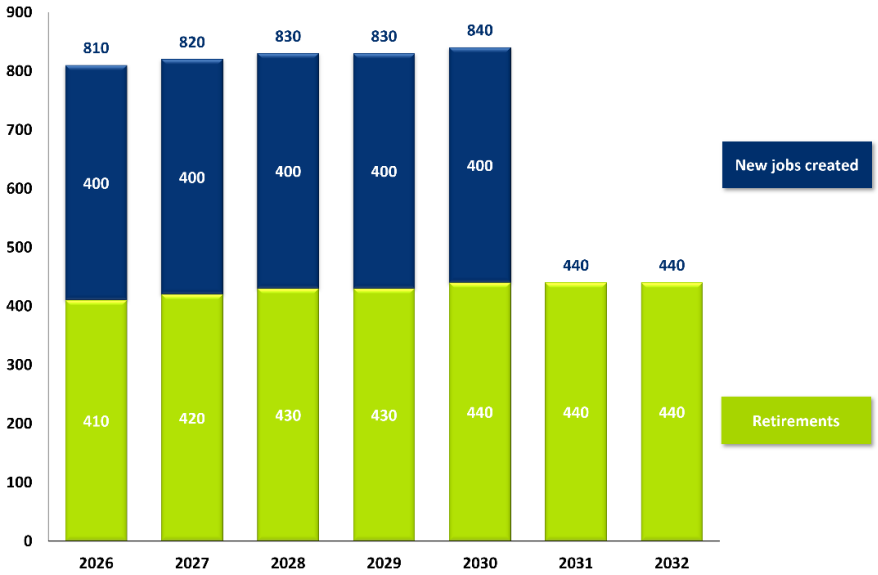
Note: Figures may not sum to the grand total due to rounding.

4.2.1 Distribution of Gas has a core requirement for 5,000 people by 2032, equivalent to 24% of the current workforce. Employment increases relatively modestly from 21,000 to 23,000 (10%), creating 2,000 new jobs, while 3,000 retirements account for the larger share of the requirement.

4.2.2 Annual workforce demand rises gradually from 810 people in 2026 to 840 in 2030, before falling to 440 people in both 2031 and 2032.

4.2.3 Retirements provide a sustained source of workforce demand throughout the period, increasing from 410 people in 2026 to 440 from 2030 onwards. New job creation contributes 400 people per year between 2026 and 2030, but falls to zero in 2031 and 2032, leaving retirements as the sole source of demand in the final two years.

Figure 23: Core requirement for people by year and cause



Note: Figures may not sum to the grand total due to rounding.

4.2.4 England accounts for 4,100 of the 5,000 people required by 2032. Scotland requires 600, Wales around 200 and Northern Ireland around 100.

4.2.5 Within England, the West Midlands has the largest requirement, at 1,000 people, followed by the South East at 900 and the North West at 800.

Figure 24: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by nation and region

Nation & Region	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
England	17,300	19,000	1,600	*10%*	2,500	*14%*	4,100	*24%*	600
Northern Ireland	400	500	<100	*10%*	100	*14%*	100	*24%*	<100
Scotland	2,500	2,700	200	*10%*	300	*14%*	600	*24%*	100
Wales	700	800	100	*10%*	100	*14%*	200	*24%*	<100
United Kingdom	**21,000**	**23,000**	**2,000**	***10%***	**3,000**	***14%***	**5,000**	***24%***	**700**
English regions									
East of England	1,400	1,500	100	*10%*	200	*14%*	300	*24%*	<100
East Midlands	1,000	1,100	100	*10%*	100	*14%*	200	*24%*	<100
London	1,800	1,900	200	*10%*	300	*14%*	400	*24%*	100
North East	<100	<100	<100	*10%*	<100	*14%*	<100	*24%*	<100
North West	3,400	3,700	300	*10%*	500	*14%*	800	*24%*	100
South East	3,700	4,000	300	*10%*	500	*14%*	900	*24%*	100
South West	1,100	1,200	100	*10%*	200	*14%*	300	*24%*	<100
West Midlands	4,000	4,400	400	*10%*	600	*14%*	1,000	*24%*	100
Yorkshire & The Humber	1,000	1,100	100	*10%*	100	*14%*	200	*24%*	<100

Note: Figures may not sum to the grand total due to rounding.

4.2.6 Front Line Technical occupations have the largest core workforce requirement, requiring 2,000 people by 2032, equivalent to 26% of the current workforce. Around 1,300 of this requirement comes from retirements, compared with 700 new jobs.

Figure 25: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by broad occupational group

Broad Occupational Group	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
Managerial	2,900	3,100	300	*10%*	500	*17%*	800	*27%*	100
Technical Professional	2,400	2,600	200	*10%*	200	*10%*	400	*19%*	100
Business Support	8,300	9,100	800	*10%*	1,000	*12%*	1,800	*22%*	300
Front Line Technical	7,400	8,100	700	*10%*	1,300	*17%*	2,000	*26%*	300
Other	100	100	<100	*10%*	<100	*15%*	<100	*25%*	<100
Gas Networks – Distribution of Gas	**21,000**	**23,000**	**2,000**	***10%***	**3,000**	***14%***	**5,000**	***24%***	**700**

Note: Figures may not sum to the grand total due to rounding.

4.2.7 Figure 25 shows demand is concentrated in a small number of occupations:

- Skilled Construction and Building Trades — 900 people
- Corporate Managers and Directors — 600 people
- Business and Public Service Associate Professionals — 400 people
- Administrative Occupations — 400 people
- Customer Service Occupations — 400 people
- Process, Plant and Machine Operatives — 400 people

Figure 26: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by occupation

Skill level	Standard Occupation Classification	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	2,200	2,500	200	10%	400	17%	600	27%	100
	12 - Other Managers and Proprietors	600	700	100	10%	100	17%	200	27%	<100
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	1,500	1,700	100	10%	100	9%	300	18%	<100
	22 - Health Professionals	0	0	0	--	0	--	0	--	0
	23 - Teaching and Other Educational Professionals	0	0	0	--	0	--	0	--	0
	24 - Business, Media and Public Service Professionals	1,300	1,400	100	10%	200	12%	300	21%	<100
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	900	900	100	10%	100	11%	200	21%	<100
	32 - Health and Social Care Associate Professionals	0	0	0	--	0	--	0	--	0
	33 - Protective Service Occupations	0	0	0	--	0	--	0	--	0
	34 - Culture, Media and Sports Occupations	0	0	0	--	0	--	0	--	0
	35 - Business and Public Service Associate Professionals	2,100	2,300	200	10%	200	10%	400	20%	100
RQF 3 SCQF 6	41 - Administrative Occupations	1,700	1,900	200	10%	300	16%	400	25%	100
	42 - Secretarial and Related Occupations	200	300	<100	10%	100	22%	100	32%	<100
	51 - Skilled Agricultural and Related Trades	100	100	<100	10%	<100	28%	<100	38%	<100
	52 - Skilled Metal, Electrical and Electronic Trades	1,200	1,300	100	10%	200	14%	300	24%	<100
	53 - Skilled Construction and Building Trades	3,600	4,000	300	10%	500	15%	900	24%	100
	54 - Textiles, Printing and Other Skilled Trades	0	0	<100	10%	<100	14%	<100	24%	<100
	61 - Caring Personal Service Occupations	100	100	<100	10%	<100	16%	<100	25%	<100
	62 - Leisure, Travel and Related Personal Service Occupations	0	0	0	--	0	--	0	--	0
	63 - Community and Civil Enforcement Occupations	0	0	0	--	0	--	0	--	0
RQF 2 SCQF 5	71 - Sales Occupations	400	500	<100	10%	100	13%	100	23%	<100
	72 - Customer Service Occupations	1,900	2,100	200	10%	200	10%	400	19%	100
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	1,400	1,600	100	10%	200	18%	400	27%	100
	82 - Transport and Mobile Machine Drivers and Operatives	1,000	1,100	100	10%	200	25%	300	34%	<100
	91 - Elementary Trades and Related Occupations	0	0	<100	10%	<100	16%	<100	26%	<100
	92 - Elementary Administration and Service Occupations	600	600	100	10%	100	15%	100	24%	<100
Gas Networks – Distribution of Gas		**21,000**	**23,000**	**2,000**	**10%**	**3,000**	**14%**	**5,000**	**24%**	**700**

Note: Figures may not sum to the grand total due to rounding.

4.3 Construction of gas utility projects

Figure 27: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by sub-industry

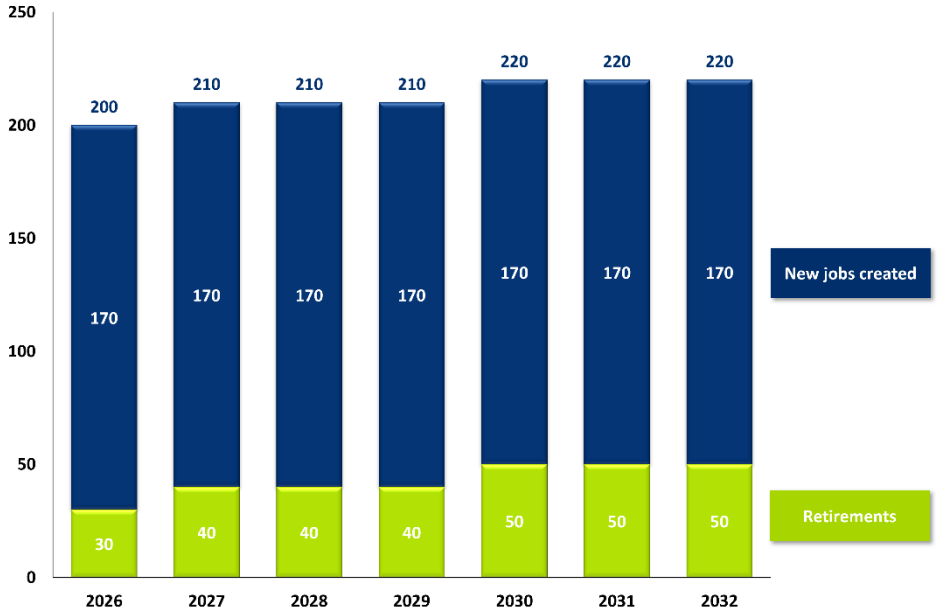
Sub-Industry	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
Construction of Gas Utility Projects	**1,500**	**2,700**	**1,200**	***80%***	**300**	***20%***	**1,500**	***100%***	**200**

Note: Figures may not sum to the grand total due to rounding.

4.3.1 Construction of Gas Utility Projects is forecast to grow rapidly, with employment increasing from 1,500 in 2025 to 2,700 by 2032. This represents 1,200 additional jobs or growth of 80%. Including retirement demand, employers will need to attract around 1,500 people, equivalent to 100% of the current workforce.

4.3.2 Annual demand remains broadly stable at around 200 people throughout most of the period. Retirements increase from 30 in 2026 to 40 in 2027 and then again to 50 in 2031.

Figure 28: Core requirement for people by year and cause



Note: Figures may not sum to the grand total due to rounding.

4.3.3 England accounts for around 1,100 of the 1,500 people required. Scotland requires approximately 300 people, while Wales requires around 100 and Northern Ireland fewer than 100.

4.3.4 Within England, the East of England has the largest requirement, at around 300 people. Yorkshire & the Humber require 200 people. London, the North West, the South East, the South West and the West Midlands require approximately 100 people.

Figure 29: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by nation and region

Nation & Region	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
England	1,100	2,000	900	*80%*	200	*20%*	1,100	*100%*	200
Northern Ireland	<100	<100	<100	*80%*	<100	*20%*	<100	*100%*	<100
Scotland	300	500	200	*80%*	100	*20%*	300	*100%*	<100
Wales	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
United Kingdom	**1,500**	**2,700**	**1,200**	***80%***	**300**	***20%***	**1,500**	***100%***	**200**
English regions									
East of England	300	500	200	*80%*	100	*20%*	300	*100%*	<100
East Midlands	<100	<100	<100	*80%*	<100	*20%*	<100	*100%*	<100
London	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
North East	<100	100	<100	*80%*	<100	*20%*	<100	*100%*	<100
North West	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
South East	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
South West	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
West Midlands	100	200	100	*80%*	<100	*20%*	100	*100%*	<100
Yorkshire & The Humber	200	300	100	*80%*	100	*20%*	200	*100%*	<100

Note: Figures may not sum to the grand total due to rounding.

4.3.5 Business Support occupations have the largest core workforce requirement, requiring 500 people by 2032.

4.3.6 Managerial, Technical Professionals and Front Line Technical all require 200 people.

Figure 30: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by broad occupational group

Broad Occupational Group	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
Managerial	200	300	100	*80%*	100	*23%*	200	*103%*	<100
Technical Professional	200	400	200	*80%*	<100	*13%*	200	*93%*	<100
Business Support	600	1,000	500	*80%*	100	*18%*	500	*98%*	100
Front Line Technical	600	1,000	400	*80%*	100	*23%*	200	*103%*	100
Other	0	0	0	--	0	--	0	--	0
Gas Networks – Construction of Gas Utility Projects	**1,500**	**2,700**	**1,200**	*80%*	**300**	*20%*	**1,500**	*100%*	**200**

Note: Figures may not sum to the grand total due to rounding.

4.3.7 Figure 31 shows demand is concentrated in a small number of occupations:

- Business, Media and Public Service Professionals — 300 people
- Corporate Managers and Directors — 200 people
- Skilled Metal, Electrical and Electronic Trades — 200 people
- Skilled Construction and Building Trades — 200 people

Figure 31: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by occupation

Skill level	Standard Occupation Classification	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	100	300	100	80%	<100	23%	200	103%	<100
	12 - Other Managers and Proprietors	<100	<100	<100	80%	<100	23%	<100	103%	<100
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	200	300	100	80%	<100	12%	100	92%	<100
	22 - Health Professionals	0	0	0	--	0	--	0	--	0
	23 - Teaching and Other Educational Professionals	0	0	0	--	0	--	0	--	0
	24 - Business, Media and Public Service Professionals	300	500	200	80%	100	16%	300	96%	<100
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	100	100	100	80%	<100	15%	100	95%	<100
	32 - Health and Social Care Associate Professionals	0	0	0	--	0	--	0	--	0
	33 - Protective Service Occupations	0	0	0	--	0	--	0	--	0
	34 - Culture, Media and Sports Occupations	0	0	0	--	0	--	0	--	0
	35 - Business and Public Service Associate Professionals	100	100	100	80%	<100	14%	100	94%	<100
RQF 3 SCQF 6	41 - Administrative Occupations	200	300	200	80%	100	21%	200	101%	<100
	42 - Secretarial and Related Occupations	0	0	0	--	0	--	0	--	0
	51 - Skilled Agricultural and Related Trades	0	0	0	--	0	--	0	--	0
	52 - Skilled Metal, Electrical and Electronic Trades	100	200	100	80%	<100	19%	100	99%	<100
	53 - Skilled Construction and Building Trades	200	300	100	80%	100	20%	200	100%	<100
	54 - Textiles, Printing and Other Skilled Trades	0	0	0	--	0	--	0	--	0
	61 - Caring Personal Service Occupations	0	0	0	--	0	--	0	--	0
	62 - Leisure, Travel and Related Personal Service Occupations	0	0	0	--	0	--	0	--	0
	63 - Community and Civil Enforcement Occupations	0	0	0	--	0	--	0	--	0
RQF 2 SCQF 5	71 - Sales Occupations	<100	<100	<100	80%	<100	18%	<100	98%	<100
	72 - Customer Service Occupations	0	0	0	--	0	--	0	--	0
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	<100	100	<100	80%	<100	24%	<100	104%	<100
	82 - Transport and Mobile Machine Drivers and Operatives	100	200	100	80%	<100	34%	100	114%	<100
	91 - Elementary Trades and Related Occupations	100	200	100	80%	<100	22%	100	102%	<100
	92 - Elementary Administration and Service Occupations	<100	<100	<100	80%	<100	20%	<100	100%	<100
Gas Networks – Construction of Gas Utility Projects		1,500	2,700	1,200	80%	300	20%	1,500	100%	200

Note: Figures may not sum to the grand total due to rounding.

4.4 Trade of gas

Figure 32: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by sub-industry

Sub-Industry	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
Gas Networks – Trade of Gas	**7,500**	**6,500**	**-1,000**	***-13%***	**800**	***11%***	**-200**	***-2%***	**0**

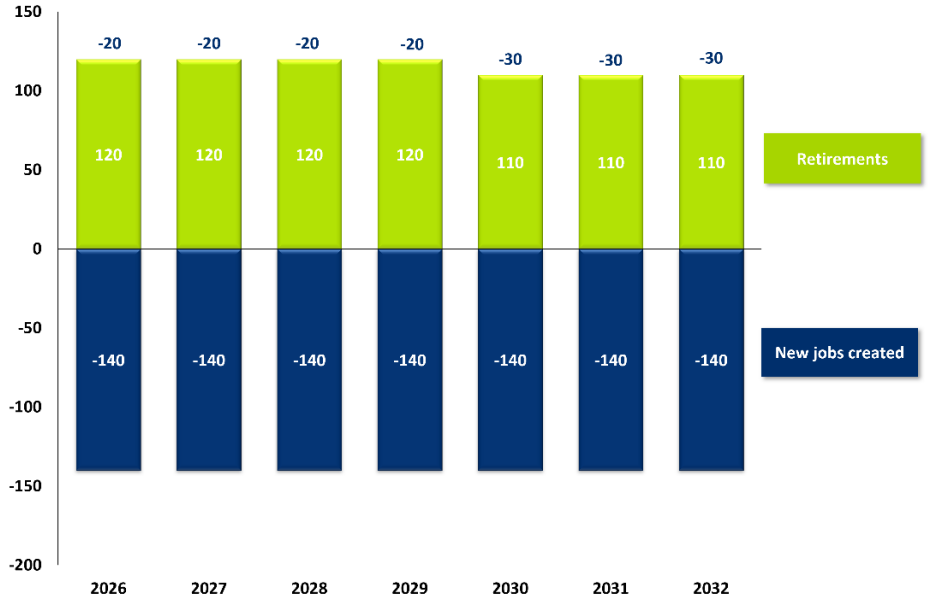
Note: Figures may not sum to the grand total due to rounding.

4.4.1 Trade of Gas is forecast to contract, with employment falling from 7,500 in 2025 to 6,500 by 2032, a reduction of 1,000 jobs (13%). Around 800 retirements offset most of this reduction, resulting in a small negative core requirement of -200 people (-2%).

4.4.2 This demonstrates that a declining workforce does not remove the need for recruitment. Workers leaving through retirement will still need to be replaced selectively to maintain the remaining workforce and operational capability.

4.4.3 Annual net workforce demand remains negative throughout the forecast period, at around -20 people per year from 2026 to 2029 and -30 per year from 2030 to 2032.

Figure 33: Core requirement for people by year and cause



Note: Figures may not sum to the grand total due to rounding.

4.4.4 England accounts for the majority of the Trade of Gas workforce, with employment falling from 4,900 to 4,300 by 2032. Scotland and Wales also experience declining employment, while retirements partly offset these reductions, resulting in a small negative core workforce requirement overall.

4.4.5 Within England, the largest Trade of Gas workforces are in the North West and Yorkshire & The Humber, at around 1,900 and 1,600 people respectively in 2025. Both are projected to contract by 2032, while workforce requirements across the English regions remain close to zero or slightly negative.

Figure 34: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by nation and region

Nation & Region	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
England	4,900	4,300	-700	*-13%*	500	*11%*	-100	*-2%*	>-100
Northern Ireland	<100	<100	<100	*-13%*	<100	*11%*	0	*-2%*	0
Scotland	1,100	1,000	-200	*-13%*	100	*11%*	>-100	*-2%*	>-100
Wales	1,400	1,200	-200	*-13%*	200	*11%*	-100	*-2%*	>-100
United Kingdom	**7,500**	**6,500**	**-1,000**	***-13%***	**800**	***11%***	**-200**	***-2%***	**0**
English regions									
East of England	100	100	<100	*-13%*	<100	*11%*	>-100	*-2%*	>-100
East Midlands	1,900	1,700	-300	*-13%*	200	*11%*	>-100	*-2%*	>-100
London	500	500	-100	*-13%*	100	*11%*	>-100	*-2%*	>-100
North East	0	0	0	--	0	--	0	--	0
North West	400	300	-100	*-13%*	<100	*11%*	>-100	*-2%*	>-100
South East	<100	<100	<100	*-13%*	<100	*11%*	>-100	*-2%*	>-100
South West	300	300	0	*-13%*	<100	*11%*	>-100	*-2%*	>-100
West Midlands	<100	<100	<100	*-13%*	<100	*11%*	>-100	*-2%*	>-100
Yorkshire & The Humber	1,600	1,400	-200	*-13%*	200	*11%*	>-100	*-2%*	>-100

Note: Figures may not sum to the grand total due to rounding.

4.4.6 Business Support experiences the largest workforce reduction, with employment falling by 500 people from 4,000 in 2025 to 3,500 by 2032. Around 400 retirements offset most of this reduction, resulting in a net core requirement of -200 people.

4.4.7 Front Line Technical employment falls by 300 people, from 2,000 to 1,700, but around 300 retirements broadly offset this decline. As a result, the group retains only a small positive core workforce requirement of less than 100 people.

Figure 35: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by broad occupational group

Broad Occupational Group	Total employment		New jobs created		Retirements		Core requirement for people		
	2025 baseline	2032	Number	*% Growth*	Number	*% of current workforce*	Total	*% of current workforce*	Average per year
Managerial	600	500	-100	*-13%*	100	*15%*	<100	*2%*	<100
Technical Professional	900	800	-100	*-13%*	<100	*8%*	>-100	*-6%*	>-100
Business Support	4,000	3,500	-500	*-13%*	400	*9%*	-200	*-4%*	>-100
Front Line Technical	2,000	1,700	-300	*-13%*	300	*14%*	<100	*1%*	<100
Other	0	0	0	--	0	--	0	--	0
Gas Networks – Trade of Gas	**7,500**	**6,500**	**-1,000**	***-13%***	**800**	***11%***	**-200**	***-2%***	**0**

Note: Figures may not sum to the grand total due to rounding.

4.4.8 Figure 35 shows demand is contracting rather than expanding at an occupational level.

Figure 36: Current workforce estimates and forecast number of new jobs created, retirements and the total core requirement for people by 2032 by occupation

Skill level	Standard Occupation Classification	Total employment		New jobs created		Retirements		Core requirement for people		
		2025 baseline	2032	Number	% Growth	Number	% of current workforce	Total	% of current workforce	Average per year
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	500	400	-100	-13%	100	15%	<100	2%	<100
	12 - Other Managers and Proprietors	100	100	>-100	-13%	<100	15%	<100	2%	<100
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	900	800	-100	-13%	100	8%	>-100	-6%	>-100
	22 - Health Professionals	0	0	0	--	0	--	0	--	0
	23 - Teaching and Other Educational Professionals	0	0	0	--	0	--	0	--	0
	24 - Business, Media and Public Service Professionals	400	300	-100	-13%	<100	10%	>-100	-3%	>-100
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	0	0	0	--	0	--	0	--	0
	32 - Health and Social Care Associate Professionals	0	0	0	--	0	--	0	--	0
	33 - Protective Service Occupations	0	0	0	--	0	--	0	--	0
	34 - Culture, Media and Sports Occupations	0	0	0	--	0	--	0	--	0
	35 - Business and Public Service Associate Professionals	400	400	-100	-13%	<100	9%	>-100	-4%	>-100
RQF 3 SCQF 6	41 - Administrative Occupations	500	400	-100	-13%	100	14%	<100	0%	<100
	42 - Secretarial and Related Occupations	0	0	0	--	0	--	0	--	0
	51 - Skilled Agricultural and Related Trades	0	0	0	--	0	--	0	--	0
	52 - Skilled Metal, Electrical and Electronic Trades	300	200	>-100	-13%	<100	12%	>-100	-1%	>-100
	53 - Skilled Construction and Building Trades	1,200	1,100	-200	-13%	200	13%	>-100	0%	>-100
	54 - Textiles, Printing and Other Skilled Trades	0	0	0	--	0	--	0	--	0
	61 - Caring Personal Service Occupations	0	0	0	--	0	--	0	--	0
	62 - Leisure, Travel and Related Personal Service Occupations	0	0	0	--	0	--	0	--	0
	63 - Community and Civil Enforcement Occupations	0	0	0	--	0	--	0	--	0
RQF 2 SCQF 5	71 - Sales Occupations	200	200	>-100	-13%	<100	12%	>-100	-2%	>-100
	72 - Customer Service Occupations	2,500	2,200	-300	-13%	200	8%	-100	-5%	>-100
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	300	200	>-100	-13%	<100	16%	<100	2%	<100
	82 - Transport and Mobile Machine Drivers and Operatives	200	200	>-100	-13%	100	21%	<100	8%	<100
	91 - Elementary Trades and Related Occupations	0	0	0	--	0	--	0	--	0
	92 - Elementary Administration and Service Occupations	0	0	0	--	0	--	0	--	0
Gas Networks – Trade of Gas		7,500	6,500	-1,000	-13%	800	11%	-200	-2%	0

Note: Figures may not sum to the grand total due to rounding.

5 Future labour supply

5.1 The UK population

5.1.1 These population projections are based on assumptions about fertility, mortality and migration. They are not forecasts of future government policy, economic conditions or global events. The principal long-term assumptions are:

- annual net international migration of 230,000 from mid-2027 onwards;
- long-term fertility of 1.42 children per woman;
- continuing improvements in mortality.

5.1.2 The 2024-based projections indicate that the UK population is projected to remain broadly stable through to 2040. However, this stability masks two labour supply pressures:

- declining birth rates, resulting in fewer young people entering the workforce;
- continued reliance on migration to sustain population growth and the working-age population.

5.1.3 These pressures become increasingly apparent after 2030, particularly in sectors with ageing workforces and long training lead times.

5.2 Falling birth rates and the domestic entrant pipeline

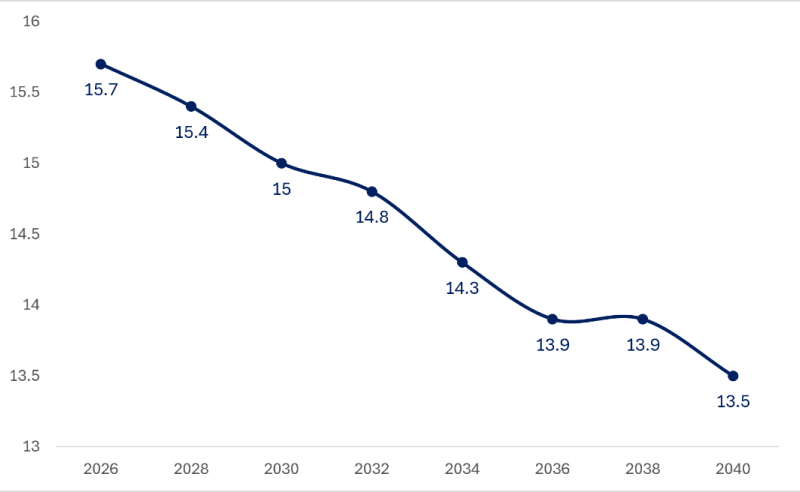
5.2.1 Birth rates in England and Wales have fallen steadily since the early 2010s. The total fertility rate declined from 1.94 children per woman in 2012 to 1.39 in 2025, including a fall from 1.41 in 2024.[6]

5.2.2 These lower birth rates will directly affect workforce entrants during the period covered by this analysis:

- people entering employment at age 18 in 2032 were born in 2014;
- those entering at age 18 in 2040 were born in 2022;
- young people entering apprenticeships at age 16 between 2032 and 2040 were born approximately between 2016 and 2024.

5.2.3 Reflecting these demographic trends, the number of people aged under 20 is projected to fall from 15.7 million in 2026 to 13.5 million by 2040.

Figure 37: Population projections for people aged 0-19 from 2026 to 2040 in millions[7]



[6] Births in England and Wales: 2025, ONS, September 2026

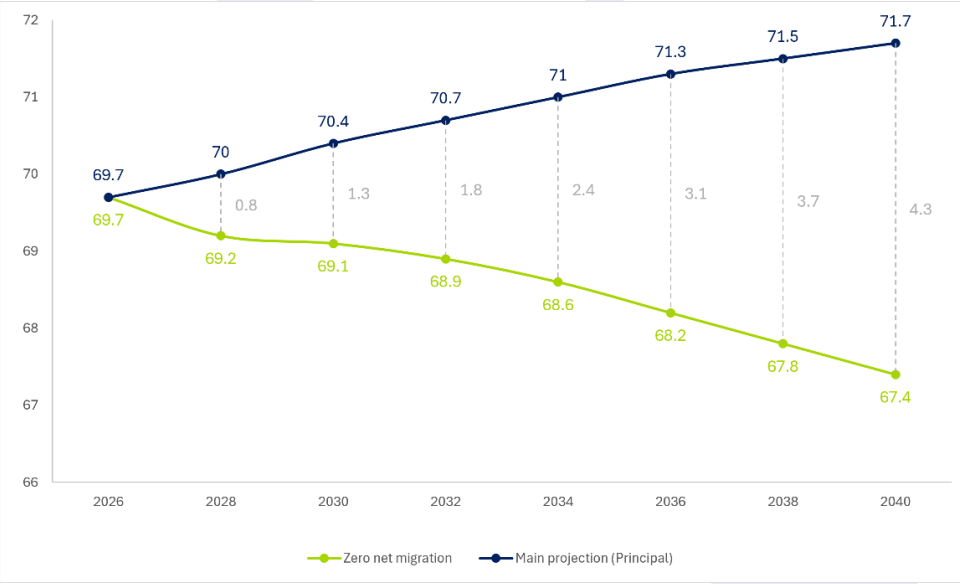
[7] UK Population Projection Explorer, ONS, April 2026

5.2.4 This decline indicates that fewer young people will be available to enter employment and training during the 2030s, resulting in a tighter domestic talent pipeline. As a result, workforce demand will increasingly need to be met through higher retention, retraining, productivity improvements and, where appropriate, migration.

5.3 Migration and sustaining the working-age population

5.3.1 Under the principal projection, migration is the sole source of long-term population growth. The UK population is projected to increase from around 69.7 million in mid-2026 to 71.6 million by 2040.

Figure 38: UK population projections under principal and zero net migration scenarios from 2026 to 2040 with the widening population gap shown in millions[8]



5.3.2 Under the zero net migration variant, the population begins to decline as deaths exceed births, falling towards 67 million by 2040. This illustrates the extent to which future population growth is dependent on migration.

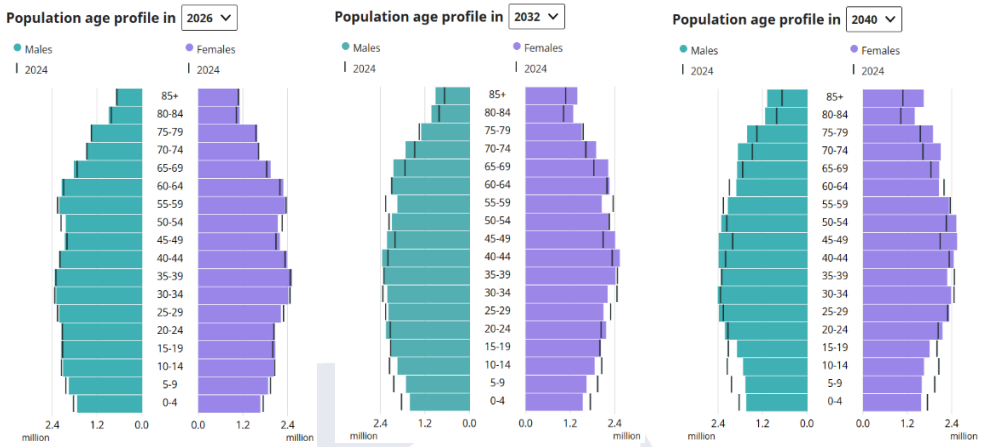
5.3.3 In 2025, there was an estimated net migration of 204,000.[9] This was two-thirds lower than a year earlier (649,000). Net migration remains an important contributor to population and workforce growth, but the decline from 649,000 to 204,000 within a year demonstrates that migration flows can change rapidly in response to policy, economic and international factors. This introduces uncertainty for sectors that rely heavily on migration to meet workforce requirements.

5.3.4 **Error! Reference source not found.**39 illustrates how the UK's age structure is projected to change between 2026 and 2040. The base of the population pyramid narrows over time, reflecting lower birth rates and a reduced flow of future labour market entrants. At the same time, older age groups become larger as life expectancy improves and larger cohorts move into later life. The working-age population remains substantial throughout the projection period, but its age profile shifts upwards. This suggests that workforce pressures are likely to arise less from an overall shortage of people and more from increasing replacement demand as larger cohorts approach retirement while fewer younger workers enter the labour market.

[8] UK Population Projection Explorer, ONS, April 2026

[9] Long-term international migration, provisional: year ending June 2025, ONS, May 2026

Figure 39: UK population age profile, 2026, 2032 and 2040[10]



5.4 Implications for the sector

5.4.1 Future labour supply will be shaped by a narrowing domestic entrant pipeline and continued reliance on migration.

5.4.2 As the youth population declines, energy and utilities employers will face growing competition for engineering and technical talent from construction, advanced manufacturing, transport, defence, digital and wider infrastructure sectors.

5.4.3 Migration can also provide targeted labour supply in occupations facing shortages. The Migration Advisory Committee found that sponsored engineering workers are concentrated in younger age groups, particularly between ages 26 and 35, while the domestic engineering workforce is more evenly distributed across the working-age population.[11]

5.4.4 Migration can also help where training lead times are long, skills are internationally transferable and recruitment supports time-limited infrastructure delivery. However, it is should not be considered a substitute for sustained domestic workforce development.

5.4.5 The principal workforce challenge from 2032 onwards is therefore not overall population decline, but the interaction of four factors:

- a smaller domestic entrant pipeline;
- high replacement demand from an ageing workforce;
- increasing competition for technical skills;
- continued dependence on migration to sustain labour supply.

[10] UK Population Projection Explorer, ONS, April 2026

[11] Professionals in IT and engineering, Migration Advisory Committee, May 2025

6 Potential economic and social benefits

6.1.1 Attracting and recruiting the required 11,900 people could cost the industry an estimated £48 million just in recruitment costs alone[12] (excluding any additional training or other costs incurred once new recruits are on-boarded).

6.1.2 However, the economic benefits to the industry and to UK PLC are significantly higher.

6.1.3 Assuming that each of the 7,200 additional people in the workforce earns the median salary for their occupation[13], this could create an estimated £293 million of additional earnings entering the economy by 2032. Approximately 13% of this - c£39 million - would be paid out to the 1,300 new recruits in entry-level occupations.

Figure 40: Estimated additional salaries paid out to new recruits by 2032

Skill level	Standard Occupational Classification	Additional jobs by 2032	Median Salary	New Income Generated
RQF 7-8 SCQF 11-12	11 - Corporate Managers and Directors	700	£63,350	£42,305,130
	12 - Other Managers and Proprietors	200	£40,799	£7,229,583
RQF 6 SCQF 9-10	21 - Science, Research, Engineering and Technology Professionals	600	£52,297	£29,244,482
	22 - Health Professionals	0	£46,131	£0
	23 - Teaching and Other Educational Professionals	0	£47,479	£0
	24 - Business, Media and Public Service Professionals	700	£49,513	£35,193,840
RQF 4-5 SCQF 7-8	31 - Science, Engineering and Technology Associate Professionals	800	£35,945	£28,346,227
	32 - Health and Social Care Associate Professionals	0	£29,652	£0
	33 - Protective Service Occupations	0	£42,806	£0
	34 - Culture, Media and Sports Occupations	100	£36,510	£4,928,850
	35 - Business and Public Service Associate Professionals	1,000	£41,404	£41,511,650
RQF 3 SCQF 6	41 - Administrative Occupations	600	£30,787	£18,589,191
	42 - Secretarial and Related Occupations	<100	£28,388	£624,536
	51 - Skilled Agricultural and Related Trades	<100	£28,980	£347,760
	52 - Skilled Metal, Electrical and Electronic Trades	400	£39,942	£14,115,503
	53 - Skilled Construction and Building Trades	900	£35,764	£31,007,388
	54 - Textiles, Printing and Other Skilled Trades	<100	£29,208	£58,416
	61 - Caring Personal Service Occupations	<100	£26,859	£429,744
	62 - Leisure, Travel and Related Personal Service Occupations	0	£27,911	£0
	63 - Community and Civil Enforcement Occupations	0	£32,945	£0
RQF 2 SCQF 5	71 - Sales Occupations	<100	£26,121	£1,112,755
	72 - Customer Service Occupations	600	£28,485	£17,432,820

[12] Based on recruitment costs of: Managerial = £9,000; Technical Professional = £6,000; Front Line Technical = £3,500; Business Support = £2,100; Other = £2,000.

[13] Source: Earnings and hours worked, occupation by four-digit SOC: ASHE Table 14, 23rd October 2025.

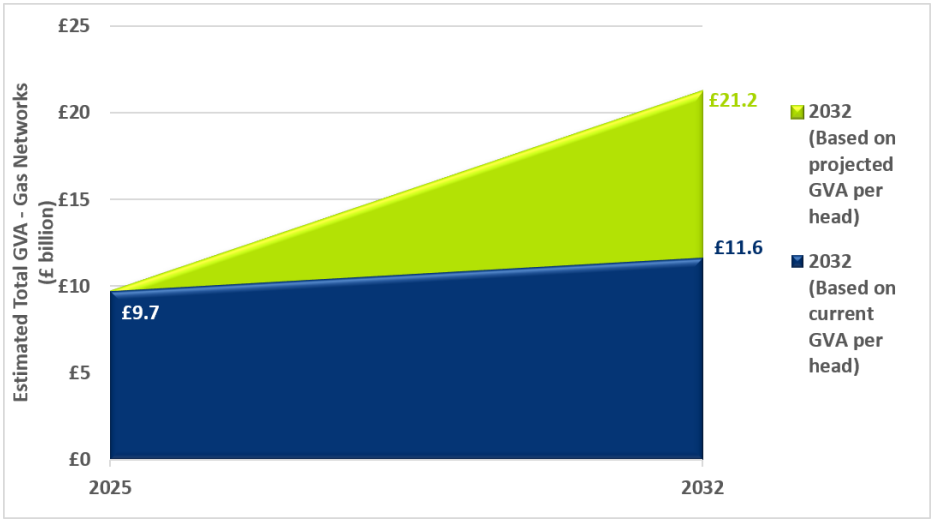
Skill level	Standard Occupational Classification	Additional jobs by 2032	Median Salary	New Income Generated
RQF 1 SCQF 4	81 - Process, Plant and Machine Operatives	200	£31,158	£5,652,061
	82 - Transport and Mobile Machine Drivers and Operatives	300	£36,869	£10,898,476
	91 - Elementary Trades and Related Occupations	100	£28,259	£2,413,319
	92 - Elementary Administration and Service Occupations	100	£27,486	£1,803,082
Gas Networks		7,200		£293,244,813

Note: Figures may not sum to the grand total due to rounding.

6.1.4 An approximate estimate of the total GVA of the gas networks industry in 2025 is £10 billion (based on output per worker in the electricity and gas industry multiplied by the total workforce).

6.1.5 By 2032, total GVA could reach between £12 billion (based on 2025 output per worker) and £21 billion (based on annual growth of 9% in output per worker – continuing the growth trajectory seen over the past five years)[14].

Figure 41: Estimated total GVA created by the gas networks industry (£ billions)



[14] Energy & Utility Skills' estimate of GVA per head in the gas networks industry is based on Output per job, UK, ONS, 18th August 2026 and headcount estimates produced for this analysis.

7 Conclusions

7.1.1 The gas networks industry faces a substantial workforce challenge over the period to 2032. The workforce is projected to grow from 32,000 to 39,200, creating 7,200 additional jobs. Combined with around 4,700 retirements, the industry has a core requirement for 11,900 people over the forecast period, equivalent to 37% of the current workforce and an average of around 1,700 people per year.

7.1.2 Annual workforce demand remains relatively stable at 1,700–1,800 people between 2026 and 2030, before falling to 1,400 in 2031 and 2032. New job creation is the main driver of the core requirement, although retirements account for a larger share towards the end of the period. In addition, staff turnover could create a further 7,000 vacancies by 2032 if people leave the industry for employment elsewhere or overseas, emphasising the importance of retention alongside attraction.

7.1.3 The scale and nature of workforce demand varies considerably between sub-industries. Manufacture of Gas has the largest core requirement, requiring 5,600 people by 2032, equivalent to 279% of its current workforce and driven primarily by the creation of 5,000 additional jobs. Distribution of Gas requires a further 5,000 people, while Construction of Gas Utility Projects has a core requirement equivalent to 100% of its current workforce. Trade of Gas is forecast to contract, with retirements offsetting most of the reduction in employment and resulting in a small negative core requirement.

7.1.4 Demand is distributed across the UK but varies considerably across nations and regions. England accounts for 8,900 of the 11,900 people in the core requirement, while Wales faces the greatest relative challenge, requiring 1,700 people, equivalent to 60% of its current workforce. Within England, the East of England has the largest core requirement at 1,600 people, followed by the West Midlands at 1,500 and the South East at 1,400.

7.1.5 Professional, technical and vocational skills remain central to delivery. RQF Level 3 / SCQF Level 6 has the largest core requirement, with 3,400 people needed by 2032, while RQF Levels 4–5 face the greatest relative pressure, with demand equivalent to 59% of the current workforce. Together, RQF Levels 3 to 6 account for 7,700 people, around 65% of the total core requirement.

7.1.6 Business Support occupations account for the largest workforce requirement, with 5,000 people needed by 2032. Front Line Technical occupations have the second-largest requirement at 3,600 people, followed by Technical Professional occupations at 1,800. Together, these three groups account for the majority of the industry's core requirement.

7.1.7 Five occupational groups are assessed as critical to delivery:

- Science, Research, Engineering and Technology Professionals
- Skilled Metal, Electrical and Electronic Trades
- Skilled Construction and building Trades
- Science, Engineering and Technology Associate Professionals
- Process, Plant and Machine Operatives

7.1.8 These critical occupational groups are forecast to create 2,900 additional jobs and require 4,600 people to enter their workforces by 2032. A further five occupational groups are assessed as high priority. Together, critical and high-priority occupational groups account for around 5,700 additional jobs and require more than 9,000 people to enter their workforces, demonstrating the concentration of workforce pressure in occupations central to infrastructure and operational delivery.

7.1.9 At a more detailed level, nine occupations are assessed as critical priorities. Together, they are forecast to create 1,800 additional jobs and have a core requirement for 2,800 people by 2032. Plumbers and heating and ventilating engineers have the largest requirement, at 1,200 people, while engineering, construction, project management and regulatory occupations also feature among the industry's critical workforce needs.

7.1.10 Future labour supply is likely to become more constrained as the domestic entrant pipeline narrows. The number of people aged under 20 is projected to fall from 15.7 million in 2026 to 13.5 million by 2040, while the industry will continue to compete with other sectors for engineering and technical talent. Migration can help address occupation-specific shortages, particularly where training lead times are long, but is unlikely to substitute for sustained domestic workforce development.

7.1.11 AI and automation are expected to change how work is undertaken more than overall employment levels. Seven occupational groups, with a combined core requirement for 2,600 people, are identified as at risk of workforce-demand reduction. Under the high-adoption scenario, the analysis indicates a potential reduction of up to approximately 390 workers, equivalent to around 3% of the industry's total core requirement. Across much of the workforce, technology is more likely to reshape roles, skills and working practices or augment workforce capability than substantially reduce overall workforce demand.

7.1.12 No single recruitment or training route can deliver the number and mix of people required. Industry will need to use a range of entry pathways, including sector-entry programmes, apprenticeships, graduate programmes, industry transitions, experienced-hire recruitment and internal progression. Lead times to competence mean that expanding some pipelines will not meet immediate demand, making the transition of experienced workers, development of the existing workforce and retention of critical skills particularly important.

7.1.13 Meeting this workforce requirement would also bring substantial economic benefits. Attracting and recruiting the 18,900 people represented by the core requirement and potential additional turnover vacancies is estimated to cost around £71 million before training and onboarding costs. The 7,200 additional jobs are estimated to generate approximately £293 million in additional earnings, while the industry's total GVA could increase from around £7 billion in 2025 to between £8.6 billion and £10.2 billion by 2032.

7.1.14 The workforce requirement is therefore both a significant delivery challenge and an important economic opportunity. Meeting it will require coordinated action to attract new people, expand routes to competence, retain experience and critical knowledge, support workforce mobility and use technology responsibly to increase delivery capacity. Workforce planning will need to be treated as a strategic priority if the industry is to maintain existing networks and deliver future infrastructure requirements.

8 Call to action

8.1 Ambition, growth and opportunity

8.1.1 The UK's gas networks industry faces substantial and changing workforce requirements over the period to 2032. Employers must maintain safe, reliable and resilient networks while responding to changing infrastructure, operational, technological and workforce requirements.

8.1.2 The industry must continue to manufacture, construct, operate and maintain essential gas network infrastructure while responding to changing operational, technological and workforce requirements. The scale and nature of this challenge vary across the industry, with substantial growth forecast in some sub-industries and contraction in another.

8.1.3 Delivering this ambition will require a skilled, productive and adaptable workforce. The challenge is not simply one of replacing retiring workers or filling vacancies. It is about ensuring that the industry has the capability, capacity and competence required to design, construct, operate and maintain increasingly complex gas network infrastructure and systems.

8.1.4 The opportunity extends across every nation and region of the UK. It includes engineering, science, environmental management, operations, construction, project delivery, digital and data professions, skilled technical trades and a wide range of supporting occupations. It creates opportunities for young people entering the labour market, experienced workers progressing within the sector, people transitioning from related industries and those who have traditionally faced barriers to employment.

8.1.5 Workforce investment must be treated as a critical enabler of industry outcomes rather than a consequence of them. Infrastructure investment and workforce investment must be planned together. Employers, governments, regulators, education and skills providers, professional bodies and supply-chain partners all have a role to play in ensuring that workforce capability grows at the pace required.

8.1.6 The commitments that follow bring together three interconnected themes:

- **Ambition**: maintaining safe, reliable and resilient gas network services while responding to changing infrastructure, operational, environmental and regulatory requirements.
- **Growth**: ensuring the industry has the workforce capacity and capability required to deliver future investment and operational requirements.
- **Opportunity**: creating pathways that enable people and communities across the UK to access rewarding, long-term careers in the gas networks industry.

8.1.7 This approach reflects the four interconnected pillars of the Skills Strategy 2025–2030:

- **Research:** developing the insight, evidence and intelligence needed to understand workforce demand, identify emerging challenges and support informed decision-making
- **Attract:** raising awareness of sector careers, broadening access to opportunities and attracting the diverse talent needed to meet future workforce requirements
- **Develop:** supporting the continuous development of a safe, skilled and productive workforce through learning, progression and skills development

- **Retain:** creating the conditions for people to build long-term careers within the sector by supporting inclusion, progression, wellbeing and workforce resilience

8.1.8 Equality, Diversity and Inclusion, AI and Technology, and Productivity provide cross-cutting themes through which activity under the four pillars should be considered.

8.2 Safety is the foundation of delivery

8.2.1 Safety and occupational competence must remain the foundation of workforce growth. They are not barriers to expansion, new entry routes, productivity improvement or technological change. They are the conditions that enable these changes to be delivered responsibly and sustainably.

8.2.2 Engineering professionals, engineering technicians, skilled trades, construction occupations and process, plant and machine operatives are among the occupations most critical to delivery. Across the five broad occupational groups identified as critical, 4,600 people will be required to enter their workforces by 2032. Many of these roles demand specialist expertise, recognised competence and substantial periods of training and workplace development.

8.2.3 Expanding the workforce must not dilute occupational standards, reduce the quality of training or lead to people being deployed before they are competent. Employers must also avoid placing unsustainable pressure on the trainers, assessors, mentors and supervisors responsible for supporting new entrants and developing the existing workforce.

8.2.4 The same principle applies to artificial intelligence, automation and other digital technologies. Technology should be adopted where it can improve safety, quality, productivity or service. However, safety-critical and regulatory decisions must remain subject to clear human accountability. Data, models and automated outputs must be appropriately validated and assured, and affected workers must be supported to develop the capabilities required by redesigned roles.

8.3 Five commitments for delivery

8.3.1 The scale and timing of demand mean that no single organisation can close the workforce gap independently. Employers must lead, supported by coordinated action from supply-chain organisations, governments, regulators, education and skills providers, trade unions, professional and standards bodies, and the Energy & Utility Skills Partnership.

Commitment 1: Plan and invest against evidenced workforce demand

8.3.2 The workforce requirement is immediate, significant and unevenly distributed. Demand varies by occupation, sub-industry, region and year.

8.3.3 Employers and supply-chain organisations should convert the forecasts into practical, funded and regularly updated workforce plans covering:

- Critical occupations and job roles
- Annual and regional demand
- Recruitment, retention and progression
- Routes to occupational competence
- Training, supervision, mentoring and assessment capacity

- Dependencies on suppliers, contractors and other infrastructure sectors

8.3.4 Plans should be reviewed as investment profiles, delivery schedules and labour-market conditions change. Regulation, price controls, procurement and contracting arrangements should give employers and their supply chains sufficient visibility and certainty to invest ahead of demand.

8.3.5 Primary ownership sits with:

- **Employers and supply-chain organisations** should produce, fund and deliver workforce plans
- **Governments and regulators** should align policy, regulation, investment and contracting arrangements with credible workforce delivery
- **The Energy & Utility Skills Partnership** should maintain the shared evidence base and provide a consistent framework for workforce planning

8.3.6 Alignment with the 2025-2030 Skills Strategy and EUSP CEO Council 2026/27 priorities:

- This commitment principally supports the **Research** pillar. It also supports the **Develop** and **Retain** pillars because effective workforce plans must address competence, progression and retention
- It directly aligns with the priorities to:
  - Update workforce demand estimates so that industry and government plan using one set of workforce-planning assumptions (**G2**)
  - Champion workforce and skills decisions based on nationally recognised, employer-informed evidence (**P1**)
  - Use industry evidence to inform regulation, price controls and contracting periods for long-term workforce planning (**UK1**)
- It also supports the wider priorities to maintain a current research programme (**G3**) and strengthen evidence-led workforce planning through partnership (**P2**)

Commitment 2: Expand safe routes to competence

8.3.7 Demand is concentrated in technical and vocational occupations. Apprenticeship and graduate routes cannot meet the earliest demand on their own because some pathways take three years or more to produce an occupationally competent worker.

8.3.8 Employers, education and skills providers, governments and standards bodies should jointly increase the capacity and range of routes into competent employment by:

- Increasing apprenticeship and graduate provision in critical occupations
- Expanding trainer, assessor, mentor, supervisor, facility and placement capacity
- Scaling sector-entry programmes linked to genuine vacancies and progression opportunities
- Developing funded modular provision aligned with sector-specific occupational requirements
- Creating progression routes for experienced workers whose capability is not fully represented by prior academic attainment
- Supporting career transitions from sectors with transferable skills
- Using targeted migration where urgent shortages cannot be filled domestically within the required timeframe

8.3.9 Every pathway must lead towards clearly defined occupational competence. Faster entry must not mean weaker standards or premature deployment into safety-critical work.

8.3.10 Primary ownership sits with:

- **Employers** should provide vacancies, placements, mentors, assessors and progression opportunities
- **Education and skills providers** should expand responsive provision and demonstrate how learning leads to recognised competence
- **Governments** should improve the flexibility, accessibility and consistency of skills funding across the UK
- **Regulators, professional bodies and standards organisations** should protect competence and quality while enabling proportionate innovation in delivery
- **The Energy & Utility Skills Partnership** should coordinate occupational profiles, standards, pathway design and cross-sector transferability

8.3.11 Alignment with the 2025-2030 Skills Strategy and EUSP CEO Council 2026/27 priorities:

- This commitment principally supports the **Develop** pillar. It also supports **Attract**, by creating credible entry routes, and **Retain**, by enabling progression and continued development.
- It directly aligns with the priorities covering:
  - Occupational profiles and occupational mapping (**G6**)
  - Standards and workforce competence (**G7**)
  - Expansion of Sector Entry provision and learner places (**P6**)
  - Flexible routes towards RQF Level 3 competence through apprenticeship units (**P7**)
  - Protection of safety and competence during apprenticeship reform (**UK2**)
  - Alternative progression routes for experienced workers into RQF Level 4 and above (**UK5**)
  - Simpler and more consistent apprenticeship funding, administration and delivery (UK6)
  - Removal of disincentives for frontline workers to become trainers and assessors (**UK7**)
- It also supports:
  - Development of a Youth Guarantee model (**G8**)
  - Effective use of skills investment and the levy (**P8**)
  - Sustainable routes from economic inactivity and unemployment into the sector (**UK3**)
  - Place-based adult skills investment (**UK4**)
  - Pathways for skilled workers moving from other industries (**P10**)

Commitment 3: Retain experience and widen access to opportunity

8.3.12 Employers should treat retention, succession and knowledge transfer as essential infrastructure-delivery activities by:

- Identifying retirement and turnover exposure in critical roles
- Strengthening career development and internal progression
- Protecting time for experienced workers to train and mentor others
- Improving job quality, inclusion, wellbeing and workforce experience

- Retaining unsuccessful applicants and displaced workers within the wider sector talent pool
- Opening routes for people who are unemployed, economically inactive, under-represented or moving from other industries

8.3.13 UK-wide action should be combined with place-based delivery so that people can access genuine vacancies, appropriate support and clear progression from entry-level roles into skilled employment.

8.3.14 Primary ownership sits with:

- **Employers** should improve retention, succession, progression and knowledge transfer
- **Governments and public employment services** should connect employment, welfare, careers and skills policy to evidenced sector demand
- **Education and skills providers** should create accessible entry and progression pathways that reflect regional labour markets
- **The Energy & Utility Skills Partnership** should coordinate talent referral, inclusion, attraction and cross-sector transition activity

8.3.15 Alignment with the 2025-2030 Skills Strategy and EUSP CEO Council 2026/27 priorities:

- This commitment principally supports the **Retain** and **Attract** pillars. It also supports **Develop** through mentoring, knowledge transfer and career progression.
- It directly aligns with the priorities to:
  - Retain skilled people and unsuccessful candidates within the sector and its supply chains (**G9**)
  - Launch the evaluated Inclusion Measurement Framework, supported by best practice and recommendations (**P9**)
  - Create pathways for skilled workers moving from industries undergoing programme-driven transitions (**P10**)
  - Reduce economic inactivity and unemployment while strengthening progression from entry-level roles into apprenticeships and skilled occupations (**UK3**)
- It also supports:
  - Development of the Youth Guarantee model (**G8**)
  - Access to careers, routes, tools and insight through the sector platform (**P4**)
  - Inclusive attraction and recruitment activity through Destination Energy (**P5**)
  - Progression by experienced workers into higher-level opportunities (**UK5**)
  - The use of experienced workers as trainers and assessors (**UK7**)

Commitment 4: Adopt technology responsibly to increase safe delivery capacity

8.3.16 Digital technologies, automation, artificial intelligence, smart assets, advanced monitoring systems and digital twins are expected to change tasks, skills and working practices across the gas networks industry. Many technologies have the potential to improve network monitoring, asset management, operational performance, safety and workforce productivity. However, technology should augment workforce capability rather than be viewed solely as a substitute for labour.

8.3.17 Employers should adopt AI, automation and digital technologies where they can demonstrably improve delivery. Implementation should be governed by:

- Task-level assessment of safety, competence and operational risk
- Workforce involvement in workflow and job redesign
- Clear human accountability for safety-critical and regulatory decisions
- Validation and assurance of data, models and automated outputs
- Structured reskilling and redeployment
- Measurement of productivity, quality, safety and service outcomes.

8.3.18 Where technology releases capacity, employers should seek to redirect it towards higher-value, safety-critical or shortage-constrained work. Adoption should respond to clearly defined operational needs rather than an assumption that technology automatically substitutes for labour.

8.3.19 Primary ownership sits with:

- **Employers** should select appropriate use cases, manage risk, redesign work and reskill affected workers
- **Regulators** should establish clear and proportionate expectations for assurance, accountability and evidence
- **Education and skills providers** should embed relevant digital and AI capabilities within technical and professional learning
- **The Energy & Utility Skills Partnership** should gather evidence, share effective practice and identify common implications for occupations, standards and workforce planning

8.3.20 Alignment with the 2025-2030 Skills Strategy and EUSP CEO Council 2026/27 priorities:

- This commitment principally supports the **Develop** pillar because it addresses new capabilities, occupational competence, reskilling and the redesign of work. It also supports **Research**, through evidence and workforce intelligence, and **Retain**, where reskilling and redeployment allow people to continue contributing within the sector.
- The commitment also advances the Skills Strategy's cross-cutting themes of **AI and Technology** and **Productivity**. These are cross-cutting themes rather than additional strategic pillars.
- No single 2026/27 priority corresponds directly and comprehensively to responsible AI and automation adoption. The commitment nevertheless supports the priorities covering:
  - Research and evidence needed to identify emerging workforce challenges (**G3**)
  - Occupational profiles and occupational mapping (**G6**)
  - Continuous improvement in standards and workforce competence (**G7**)
  - Workforce and skills decisions based on employer-informed evidence (**P1**)
  - Investment in skills and improved productivity (**P8**)
  - Protection of competence and safety as skills provision changes (**UK2**)
- This supporting alignment should not be interpreted as making any one of these priorities a standalone AI or automation priority

Commitment 5: Champion the people delivering the UK's future

8.3.21 Workforce growth will depend not only on creating opportunities but also on making those opportunities visible, credible and attractive. The industry and its partners should champion, amplify and celebrate the people and teams who design, manufacture, build, operate and maintain the UK's Gas Network infrastructure.

8.3.22 This should include:

- Creating a shared, evidence-led account of the contribution made by the Gas Networks workforce
- Using authentic stories from employees, apprentices, career changers, trainers, mentors and supply-chain teams
- Showcasing the breadth of technical, professional, operational and support careers available across the UK
- Recognising employers and partnerships that widen access, uphold competence and improve workforce experience
- Connecting communications to genuine jobs, training, work experience and progression opportunities
- Making careers information accessible to young people, educators, careers advisers, jobseekers and workers in transition
- Measuring whether activity improves awareness, engagement and entry into the industry, rather than reporting communications reach alone.

8.3.23 This is more than a communications commitment. It supports attraction by showing people where opportunities exist, development by making pathways and competence requirements clear, and retention by recognising the contribution of the existing workforce and demonstrating that the industry offers meaningful, long-term careers.

8.3.24 Primary ownership sits with:

- **Employers and supply-chain organisations** should provide authentic workforce stories, career information and examples of effective practice
- **Trade unions, employee networks and workforce representatives** should help ensure that communications accurately reflect the work and the workforce experience
- **Education, careers and employment partners** should bring these messages to schools, colleges, universities, jobseekers and local communities
- **The Energy & Utility Skills Partnership** and sector communications networks should coordinate and amplify a consistent industry narrative

8.3.25 Alignment with the 2025-2030 Skills Strategy and EUSP CEO Council 2026/27 priorities:

- This commitment principally supports the **Attract** pillar

  It also supports **Retain**, through recognition and an authentic employee proposition, and **Develop**, by explaining career pathways, progression and competence requirements
- It directly aligns with the priorities to:
  - Align communications and marketing with the agreed CEO Council priorities (**G10**)
  - Deliver coordinated sector attraction and recruitment activity through Destination Energy (**P5**)
- It also supports the priorities to:
  - Deepen partnerships and clarify engagement routes (**G4**)
  - Support worker transitions through the North Sea Worker service (**G5**)
  - Use occupational profiles to make careers and pathways clearer (**G6**)
  - Retain candidates and skilled people within the sector talent pool (**G9**)
  - Provide access to careers, routes, tools and insight through the sector platform (**P4**)

- Promote inclusive workforce practice and recommendations (**P9**)
- Make transition pathways visible to workers in adjacent industries (**P10**)
- Strengthen entry routes and progression from economic inactivity or unemployment into skilled work (**UK3**)

Summary of strategic alignment

8.3.26 The following table distinguishes between:

- **Direct alignment:** the commitment would materially contribute to delivery of the priority
- **Supporting alignment:** the commitment contributes to the priority but would not deliver it by itself

Commitment	2025-2030 Skills Strategy alignment	EUSP CEO Council 2026/27 priority alignment (Direct)	EUSP CEO Council 2026/27 priority alignment (Supporting)
1. Plan and invest against evidenced workforce demand	**Primary:** Research. **Supporting:** Develop and Retain.	G2, P1, UK1	G3, P2
2. Expand safe routes to competence	**Primary:** Develop. **Supporting:** Attract and Retain.	G6, G7, P6, P7, UK2, UK5, UK6, UK7	G8, P8, UK3, UK4, P10
3. Retain experience and widen access to opportunity	**Primary:** Retain and Attract. **Supporting:** Develop.	G9, P9, P10, UK3	G8, P4, P5, UK5, UK7
4. Adopt technology responsibly to increase safe delivery capacity	**Primary:** Develop. **Supporting:** Research and Retain. **Cross-cutting:** AI and Technology; Productivity.	No single priority directly covers the full commitment	G3, G6, G7, P1, P8, UK2
5. Champion the people delivering the UK's future	**Primary:** Attract. **Supporting:** Retain and Develop.	G10, P5	G4, G5, G6, G9, P4, P9, P10, UK3

8.3.27 The mapping identifies the priorities to which each commitment makes the clearest direct or supporting contribution. It does not imply that a commitment is solely responsible for delivering those priorities. The four pillars are interconnected, and action under one commitment may contribute to outcomes across more than one pillar.

8.4 The immediate commitment

8.4.1 The workforce requirement is not a distant 2032 issue. There are significant, immediate workforce requirements, while many technical and professional pathways can take years to produce an occupationally competent worker.

8.4.2 The industry and its partners should therefore commit now to:

1. **Produce funded workforce and supply-chain plans** for critical occupations, regions and delivery programmes
2. **Expand training, supervision, mentoring and assessment capacity** ahead of demand
3. **Scale entry, progression and transition routes** without weakening competence or safety standards

4. **Retain experienced workers and protect critical knowledge** through succession planning, progression and mentoring
5. **Adopt AI, automation and digital technologies responsibly**, with clear human accountability
6. **Champion the people and opportunities behind network investment**, connecting communications to genuine jobs, training and careers
7. **Report progress collectively**, using shared workforce outcomes and escalating barriers that individual organisations cannot resolve

8.4.3 By their next workforce-planning cycle, major employers and participating supply-chain organisations should be able to demonstrate how their plans:

- Respond to evidenced occupational demand
- Increase routes to competence
- Protect safety
- Expand delivery capacity
- Support retention

8.4.4 The industry's infrastructure programme will move only as quickly as the workforce behind it. Investment in people must therefore be planned, funded and governed with the same urgency as investment in the network itself.

Annex 1 – Occupations and example job titles

Skill Level	Standard Occupation Classification	Occupational Group	Example job titles
RQF 7-8 SCQF 11-12	**11 - Corporate Managers and Directors**	Managerial	Chief Executive; Managing Director; Operations Director; Engineering Director; Network Operations Manager; Asset Manager; Capital Delivery Manager; Head of Gas Trading; Trading Director; Plant Director
	12 - Other Managers and Proprietors	Managerial	Logistics Manager; Warehouse Manager; Depot Manager; Facilities Manager; Project-accommodation Manager; proprietor/director of a small gas-utility contractor
RQF 6 SCQF 9-10	**21 - Science, Research, Engineering and Technology Professionals**	Technical Professional	Civil/Mechanical/Electrical Engineer; Process Engineer; Instrumentation Engineer; Control Engineer; Design Engineer; SCADA Engineer; Commissioning Engineer; Software Engineer; Data Scientist
	22 - Health Professionals	Other	Occupational Health Physician; Occupational Health Nurse/Adviser; Site Paramedic
	23 - Teaching and Other Educational Professionals	Other	Apprenticeship Trainer/Lecturer; Education Manager
	24 - Business, Media and Public Service Professionals	Business Support	Regulatory Manager; Compliance Professional; Quantity Surveyor; Chartered Land/Wayleave Surveyor; Construction Project Manager; Programme Manager; Commercial Manager; Market Risk Professional
RQF 4-5 SCQF 7-8	**31 - Science, Engineering and Technology Associate Professionals**	Technical Professional	Network Technician; Pipeline Technician; EC&I Technician; Pressure-control Technician; Engineering Technician; CAD/BIM Technician; Network Designer; IT Operations Technician; Laboratory Technician
	32 - Health and Social Care Associate Professionals	Other	Occupational Health Technician; Workplace Health Trainer; Employee Assistance Programme Counsellor; Vulnerable Customer Outreach Worker; Community Development Officer; Health & Safety Officer
	33 - Protective Service Occupations	Business Support	Fire Safety Officer; Emergency-planning Officer; specialist Critical-infrastructure Security Officer; fraud/investigation officer
	34 - Culture, Media and Sports Occupations	Business Support	Technical Author/ Illustrator; Copywriter; Translator; Corporate Videographer; Aerial/Drone Photographer
	35 - Business and Public Service Associate Professionals	Business Support	Project Support Officer; Project Planner/Scheduler; Estimator; Buyer; Procurement Officer; Data Analyst; Business Analyst; HR Adviser; Compliance Officer; Business Development Manager
RQF 3 SCQF 6	**41 - Administrative Occupations**	Business Support	Business Support Administrator; Project Administrator; Network Records Assistant; Records Control Assistant; Finance Officer; Stock-control Clerk; Logistics Coordinator
	42 - Secretarial and Related Occupations	Business Support	Executive Assistant; Personal Assistant; Legal Secretary; Receptionist
	51 - Skilled Agricultural and Related Trades	Front Line Technical	Grounds-maintenance Worker; Arborist/Tree Surgeon; Vegetation-management Operative
	52 - Skilled Metal, Electrical and Electronic Trades	Front Line Technical	Pipefitter; Pipeline Welder/Coded Pipe Welder; Mechanical Fitter; Maintenance Fitter; Industrial Electrician; Instrument Mechanic; Welder-Fabricator; Steel Fabricator; Control-panel Wirer
	53 - Skilled Construction and Building Trades	Front Line Technical	Emergency Gas Service Engineer/First Call Operative; Plumber/Pipe Installer; Heating and Ventilation Installer; Bricklayer; Carpenter/Joiner; Construction Foreman; Site Construction Supervisor
	54 - Textiles, Printing and Other Skilled Trades	Other	Digital Printer; Depot Canteen Chef
	61 - Caring Personal Service Occupations	Other	Pest Control Officer; Vulnerable Customer Care Worker
	62 - Leisure, Travel and Related Personal Service Occupations	Other	Business Travel Adviser; Reservations Agent; Project-Accommodation Housekeeper; Depot/Office Caretaker; Facilities Caretaker
	63 - Community and Civil Enforcement Occupations	Other	Not applicable

Skill Level	Standard Occupation Classification	Occupational Group	Example job titles
RQF 2 SCQF 5	**71 - Sales Occupations**	Business Support	Gas Sales Adviser; Telesales Executive; Field Sales Representative; Customer Acquisition Adviser; Meter Reader; Debt Collection Officer; Sales Supervisor
	72 - Customer Service Occupations	Business Support	Customer Service Adviser/Representative; Emergency Call Handler; Complaints Adviser; Vulnerable Customer Adviser; Contact-centre Dispatcher; Switchboard Operator; Customer Service Supervisor
RQF 1 SCQF 4	**81 - Process, Plant and Machine Operatives**	Front Line Technical	Biomethane/AD Plant Operator; Gas Production Process Operator; Gas Producer Operator; Control-room Operator; Gas Network Operative; Service Layer; Main Layer; Escape, Locate & Repair Operative; Reinstatement Operative
	82 - Transport and Mobile Machine Drivers and Operatives	Front Line Technical	HGV Driver; Feedstock/Tanker Driver; Low-loader Driver; Excavator Operator; Mobile Crane Operator; Fork-lift Driver; Dumper Driver; Delivery Driver
	91 - Elementary Trades and Related Occupations	Front Line Technical	Gas-network Assistant/Labourer; Groundworker; Trench Digger; Pipe-layer's Mate; Welder's Mate; Fitter's Mate; Construction Labourer; Civil Engineering Labourer; Craft Attendant
	92 - Elementary Administration and Service Occupations	Business Support	Warehouse Operative; Stores Assistant; Security Guard/Gatehouse Officer; Cleaner; Canteen Assistant; Delivery Operative

Annex 2 – Methodology

A2.1 Current workforce estimates and future employment forecasts

A2.1.1 Current workforce estimates use the latest available baseline for each sub-industry. Most estimates relate to 2025, although some use 2024 data where that is the latest available source. Forecasts are presented for 2032 and represent the best estimate based on information available at the time of publication, including known policy, investment and project plans. As with all forecasts, uncertainty increases over time and future workforce requirements may differ if assumptions, investment decisions, delivery timescales or economic conditions change.

A2.1.2 The estimates and forecasts contained in this report are based on research and employment data from the Lightcast labour market information system.

A2.1.3 Estimates are rounded to the nearest 100. As a result, the sum of sub-industries and tables may not equal published totals. Users should exercise caution when interpreting small differences between estimates and forecasts or changes over time, as these may reflect the effects of rounding rather than underlying variation.

A2.1.4 This analysis includes forecast workforce growth in the 2026 calendar year, through to the end of 2032 – seven full years.

A2.1.5 The gas networks industry is defined by the following Standard Industrial Classification (SIC) codes:

Standard Industrial Classification
35.21 – Manufacture of gas
35.22 – Distribution of gaseous fuels through mains
35.23 – Trade of gas through mains
42.21 – Construction of utility projects for fluids

A2.1.6 Note that not all employees in 42.21 – Construction of utility projects for fluids have been included in our definition of the gas networks industry's workforce. Energy & Utility Skills has assumed 15% of this SIC code's workforce are employed in contracting companies and related engineering providers working on gas mains, services, connections, specialist civil engineering and transmission infrastructure, but excludes employees directly employed by gas distribution networks.

A2.2 Retirement and staff turnover assumptions

A2.2.1 Retirement forecasts have been calculated on the assumption that the proportion of the current workforce in each occupation who are aged 55+ will retire over the next ten years – therefore, we have taken one-tenth of that percentage as the annual retirement rate (see the table opposite).

A2.2.2 Staff turnover, although not an element of the core requirement for people, is based on the assumption that a small proportion of the workforce will leave the industry each year to take up employment in other sectors. Leavers through staff turnover that remain in the energy & utilities sector are not reported in this analysis (as they do not need to be replaced).

Standard Occupation Classification	Annual Retirement Rate	Annual Staff Turnover Rate
11 - Corporate Managers and Directors	2.3%	2%
12 - Other Managers and Proprietors	2.3%	2%
21 - Science, Research, Engineering and Technology Professionals	1.2%	2%
22 - Health Professionals	1.8%	2%
23 - Teaching and Other Educational Professionals	1.7%	2%
24 - Business, Media and Public Service Professionals	1.6%	2%
31 - Science, Engineering and Technology Associate Professionals	1.5%	2%
32 - Health and Social Care Associate Professionals	2.0%	2%
33 - Protective Service Occupations	1.0%	2%
34 - Culture, Media and Sports Occupations	1.2%	2%
35 - Business and Public Service Associate Professionals	1.4%	2%
41 - Administrative Occupations	2.1%	5%
42 - Secretarial and Related Occupations	3.0%	5%
51 - Skilled Agricultural and Related Trades	3.8%	2%
52 - Skilled Metal, Electrical and Electronic Trades	1.9%	2%
53 - Skilled Construction and Building Trades	2.0%	2%
54 - Textiles, Printing and Other Skilled Trades	1.9%	2%
61 - Caring Personal Service Occupations	2.1%	5%
62 - Leisure, Travel and Related Personal Service Occupations	2.1%	5%
63 - Community and Civil Enforcement Occupations	1.9%	5%
71 - Sales Occupations	1.8%	5%
72 - Customer Service Occupations	1.3%	5%
81 - Process, Plant and Machine Operatives	2.4%	2%
82 - Transport and Mobile Machine Drivers and Operatives	3.3%	2%
91 - Elementary Trades and Related Occupations	2.2%	2%
92 - Elementary Administration and Service Occupations	2.0%	2%

A2.3 Estimating occupational criticality

A2.3.1 Our approach to assessing the absolute and relative criticality of each occupational group (2-digit SOCs) and detailed occupation (4-digit SOCs) is based on the weighted average of each occupations scores against the following 11 criteria.

Criterion	Description
Occupational relevance to the industry	Importance of occupation to the industry
Infrastructure delivery criticality	Importance of occupation to infrastructure delivery
Workforce shortage severity	Current or forecast workforce shortage level
Training lead time	Time required to reach competency
Replacement demand risk	Exposure to retirement and attrition
Regional concentration risk	Geographic availability constraints
Supply chain dependency	Reliance on contractors/subcontractors
Scalability of workforce	Ability to rapidly increase workforce numbers
Technology substitution potential	Potential for AI, robotics or automation to reduce workforce requirement
Regulatory / safety criticality	Importance to safety-critical or regulated activities
Future system relevance	Importance to future digital, DSO and whole-system requirements

A2.3.2 Each occupation is given a rating out of five against each criterion set out above and each score is multiplied by a weighting. The overall weighted average is then calculated and assigned to a level of criticality:

Score	Level of criticality	Suggested response
4.0 - 5.0	Critical priority	Immediate intervention required
3.0 - 3.9	High priority	Active monitoring and targeted interventions
2.0 - 2.9	Medium priority	Longer-term workforce planning
<2.0	Lower priority	Monitor only

A2.4 AI and automation adoption framework

A2.4.1 Our approach to assessing the impact of AI and automation on the future workforce is based on three adoption scenarios (low, medium and high adoption) assessed across seven dimensions of AI and automation adoption, as set out in the table below.

A2.4.2 Potential workforce effects are assessed separately and are not a defining characteristic of AI and automation adoption. Workforce impacts may vary between occupations operating under the same adoption scenario.

A2.4.3 The distinction between Significantly Impacted and Augmented occupations is important. Occupations classified as Significantly Impacted are expected to experience substantial changes to role content, responsibilities, skills and workflows, resulting in meaningful job redesign. Occupations classified as Augmented may also experience significant AI and automation adoption, but technology primarily enhances productivity, decision-making and performance while the core nature of the role remains broadly unchanged.

Dimension	Low Adoption	Medium Adoption	High Adoption
1. Investment and pace	Selective, cautious and uneven; scaling remains slow	Sustained investment in proven cases; adoption accelerates	Strong strategic investment; rapid scaling is prioritised
2. Technology maturity and autonomy	Established, low-risk tools; mainly assistive or rule-based	Mature predictive, generative and workflow tools; bounded autonomy	Agentic AI, machine vision, robotics and autonomous systems expand
3. Breadth of deployment	Selected teams, support functions and isolated operational uses	Multiple core and support functions; adoption still varies by organisation	Most feasible functions, supply-chain areas and lifecycle stages
4. Depth and operating-model integration	Tools sit alongside existing processes; pilots and local solutions dominate	Tools enter business-as-usual workflows, data platforms and governance	Processes are designed around AI; systems coordinate across workflows
5. Task automation and augmentation	Assists workers, removes discrete routine tasks and improves information access	Automates task clusters while augmenting judgement and decisions	Automates substantial sequences or selected end-to-end processes
6. Job redesign and skills	Local working-practice changes and basic AI literacy; little formal redesign	Material role redesign, structured upskilling and some redeployment	Widespread redesign, substantial reskilling and new oversight roles
7. Productivity ambition	Incremental gains in efficiency, quality, safety or service	Material productivity and capacity gains pursued across functions	Transformational gains; higher output, faster delivery or lower labour intensity

Risk Category	Definition
At Risk of Reduction	Fewer workers may be required because AI and automation increase productivity and automate routine tasks.
Significantly Impacted	Workforce demand remains broadly stable, but roles undergo substantial redesign as tasks, skills, responsibilities and workflows change significantly.
Augmented	AI and automation significantly improve productivity, decision-making and performance, but primarily enhance rather than redesign core roles, and demand for workers remains strong.
Limited Impact	Little expected effect on workforce demand because activities continue to depend heavily on physical intervention, human interaction or site-based work.

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