

# UWL26

19-20 MAY 2026  
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# INNOVATE. COLLABORATE. DELIVER.

## Buyers' insight: The £300bn challenge

What UK energy and water companies  
need to buy, and how they need to buy it

A **UtilityWeek** event

# UK UTILITIES PREPARE TO INVEST £300BN IN INFRASTRUCTURE

## What UK energy and water companies need to buy, and how they need to buy it

2026 will be a year like no other for the **UK's energy and water companies**, as they step up to deliver a **new generation of clean, green infrastructure**. With the **Clean Power 2030 target reshaping the energy landscape**, coupled with the clean-up of the **country's waterways** and **rollout** of a new breed of **reservoirs**, UK utilities will be investing in the region of **£300 billion** over the **next five to ten years**. Their programmes will touch the lives of **everyone** in the **UK**, **transforming how we live**, how we travel, how we get our drinking water and treat our wastewater, and the landscape and cityscapes that surround us.

To deliver a transformation of such scale, utilities need supply chain partners that are **reliable, efficient and effective**. They need partners that are in it for the long haul, offering capacity not just today but well into the future. And they need partners that will challenge their thinking and work within their often-complex procurement frameworks to help them achieve change.

Utility Week and Utility Week Live have unrivalled insight into UK utilities. **We've been operating at the heart of the market since privatisation in the 1980s** and with a range of information, content and events, we understand what utilities need and want – that's why **100% of major UK utilities are members of Utility Week**. Over the course of 2025, we undertook a programme of in-depth research, speaking to more than **100 buyers** from **water and energy** companies, to understand what they need to buy, when, how and from who.

This insight informs all of our offerings and underpins the design of our event and content products. **Here, we distil the key findings to support your sales strategy for the year ahead.**

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## KEY STATS



annual spend controlled by Utility Week Live visitors



estimated UK utility spend in the next five to ten years



of energy and water buyers are interested in discovering new suppliers



**8 out of 10** energy and water buyers say it is useful or very useful to meet existing suppliers face to face

# BUYING PRIORITIES 2026



Utility Week has combined the results of a bespoke market research survey with insights from in-depth interviews with **water** and **energy** leaders and an analysis of the **business plans of all major utilities** to identify **buying priorities for the year ahead**. While there are clearly differences by sector, there are also significant overlaps, particularly in the **priority areas**:

## CIVILS, CONSTRUCTION AND REINSTATEMENT:

With such **huge building programmes** slated, it's no surprise that **civils** and **construction** top the buying priorities list for 2026. **Energy networks**, particularly **transmission networks**, and **water** companies are competing with other **infrastructure** sectors for resources in this critical area, and with so much to do in so **little time**, efficiency and new ways of delivering are key.

## DIGITAL INFRASTRUCTURE:

**Utilities of all types** are actively exploring **digital twins**, **digital asset management** and how to actively mine their data for actionable insight. Upgrades to **tech** for **cyber security** and comms are also common needs across utilities of all types, with cyber security one of the most **pressing concerns** for industry leaders (see page 4).

## ASSET MANAGEMENT AND INFRASTRUCTURE:

Utilities have a shared need for the **kit** and **equipment** that keeps their networks running, whether that be linear assets such as **underground cables**, **overhead line conductors** and **pipes for energy networks**; or **pipes**, **valves** and **pumps for water**. There is also a need for **leakage** and **loss reduction technologies** across all utilities, and the common need for **SCADA** and **telemetry** technology and kit remains high.

## DECARBONISATION AND SUSTAINABILITY:

While **decarbonisation** buying priorities vary by sector, there's a clear theme here – and a clear opportunity for partners that can help utilities **drive down** their **emissions**, whether that's by supporting **gas networks** in the rollout of **biomethane**; **power networks** in **cutting SF6 emissions** from **substations**; or utilities of all breeds in delivering (and evidencing) **biodiversity net gains**. Our interviewees were clear that, while decarbonisation is a priority, **supply chains** here **are less well established** than in some other areas of their business, and they're keen to meet new suppliers who can help fill in the gaps.

## CUSTOMER:

**Tech** and **services** to support better and more efficient interaction with **customers** remains high on utilities' agenda, with business plans pointing to needs specifically around support for **vulnerable customers**, **welfare assets during outages**, **community engagement** and **customer comms**.

## WORKFORCE:

Utilities have spending plans in place for **upgrades** to their **depots** and **fleets**, specifically electrification of fleets; as well as ongoing spend on **health** and **training**, safety and apprenticeships.

# LOOKING FOR NEW PARTNERS

We asked utilities leaders where they would most value meeting new suppliers, and this is what they told us:

- / The highest scoring category was **digital infrastructure**, with one in two highlighting this as an area of need. This reflects industry feedback that digital infrastructure is the area of spend least tied up in frameworks, with the highest turnover of new requirements and suppliers.
- / Next came **asset management**, closely followed by **civil engineering and civil construction** – a surprising result, perhaps, for those who think these areas of spend are fully locked in.
- / **Sustainability**, including circular economy and nature-based solutions, came fourth on our list.



## WHAT'S KEEPING UTILITY LEADERS AWAKE AT NIGHT

The pressures of delivering an unprecedented **surge** of **infrastructure investment**, **protecting** the **environment** and ensuring **energy** and **water** systems are resilient – all while mitigating the **cost** to **customers** – continues to weigh heavily on utility leaders.

Our **Utilities Risk Register** takes the annual pulse of the sector and the latest edition confirmed that a **cyber security breach** remains the worst nightmare. However, a lack of **policy** and **regulatory** certainty, the impact of **geopolitical volatility** and the **threat** of **extreme weather** continue to rival as chief concerns.

Rising up the list in the most recent iteration were **growing concerns** about the **investability** of the sector, as both **energy** and **water** companies continue to wrangle with their **regulators** over what a reasonable rate of return actually looks like. On the flip side, there was a recognition that widespread **affordability issues** could drive significant **government intervention** in the market.

An ever-present concern layered across many of these individual risks is that of **failing to attract and retain** the necessary **talent** to deliver on utilities' promises over the coming years.

# HOW UTILITIES WANT TO BUY

There's a lot more to selling to utilities than simply getting onto their frameworks – though that in itself can be hard enough. Our interviewees told us they need credible supply chain partners who are able to form long term relationships, and provide the evidence they need to satisfy often complex procurement requirements.

- / Companies are increasingly exploring long term, **10-15 year frameworks** rather than narrow 5 or 8 year regulatory cycles, and remain keen on alliance style models or enterprise contracting, such as **Project 13** (see box, right), which allow suppliers to invest in people and equipment; **reduce churn between regulatory cycles and promote shared risk, shared outcomes, and shared data**. Multi-year certainty is important, particularly where **scarce skills are impacting programme delivery**.
- / Utilities need **evidence-led decision making**, requiring suppliers that are able to bring **data, case studies** and **evidential results** to the table. They need their suppliers to demonstrate **whole life cost, net zero impact, resilience benefits, and performance uplifts**.
- / **Simplicity, usability, and integration** are key, with companies reporting overwhelm from too many platforms, too much **data**, and **immature digital systems**. They are looking for tools that integrate with existing systems; that are not 'black box' AI but are open to explanation and challenge. There's a **divergence** here **between energy and water companies** – **water companies** are at the start of the digital journey and **looking to get foundational solutions in place before rolling out AI at scale**, wanting to deliver good data in standardised formats. **Energy companies are more advanced** and are looking for ways to **increase the pace and benefit of digitalisation**.
- / **Early engagement** is key for both sectors, with buyers keen to engage suppliers before designs, both physical and digital are locked into place. They acknowledge this is not always easy to do, as utilities have **complex procurement processes** that can be difficult to navigate. Strong relationships and frequent touchpoints remain key. While this can make it hard for innovators to enter the sector, there are mechanisms in place to support them.

## PROJECT 13

Launched in 2017, **Project 13** encourages infrastructure developers to look beyond upfront costs and build long-term partnerships. At its core was an enterprise model where infrastructure owners and their supply chain shared outcomes, risks and incentives for sustainable delivery. Developed by the **Infrastructure Client Group** with the **Institution of Civil Engineers**, it rests on five pillars: **Capable Owner, Governance, Integration, Organisation** and **Digital Transformation**.

**Project 13** has evolved through stakeholder feedback, shaping utilities initiatives including **National Grid's Great Grid Partnership** and **United Utilities' AMP8 enterprise model**.

## MORE ABOUT FRAMEWORKS

All utilities operate frameworks for selected categories of spend, effectively pre-selecting suppliers for a defined period. These are particularly prevalent in high-value areas such as civil engineering and contracting, helping utilities reduce the need for repeated, lengthy procurement processes while still meeting their obligations as semi-public bodies. Framework periods vary by utility and do not always align with regulatory cycles. More information can usually be found on company websites or industry portals.

## MORE ABOUT INNOVATION

While utilities emphasise the need for **substantial partners** with a proven track record who can **meet their process requirements** and operate at scale, they also remain open to **innovation**. They recognise, however, that this can be difficult for smaller companies to navigate. To support innovators entering the energy and water sectors, industry **initiatives are offered** via the **Energy Innovation Centre** and **Spring**. Find out more at **Utility Week Live 2026** (19-20 May, NEC) or via their websites.

## TOP REQUIREMENTS ACROSS ALL UTILITIES:



Realistic tech,  
without the hype



Clear evidence  
of impact



Long term  
relationships

# TOP OF MIND: MAKING THE HEADLINES IN 2025

The past year has been a tumultuous one for the utilities sector, with major infrastructure delivery programmes kicking in and significant policy and regulatory change. Throughout 2025 Utility Week was there to report the key developments, analyse their significance and speculate on what's next.

Among the prominent topics grabbing the attention of readers throughout the year were:

## HOW TO RESHAPE GREAT BRITAIN'S ELECTRICITY MARKET:

2025 saw the **government reject** pleas to **introduce locational electricity pricing** in favour of reforms to the current **national wholesale price**. How exactly it will do this, what it means for **network charges**, the approach to **constraint costs** and the **impact** on **energy bills** will continue to **dominate coverage** throughout 2026.

## THE FUTURE OF THE WATER SECTOR:

The **Independent Water Commission's** review, including the headline recommendation to **abolish Ofwat**, is the **biggest change** to the water sector since privatisation. But how will such major upheavals be implemented and will there be unintended consequences?

## REFORMING GRID CONNECTIONS:

The aim of streamlining the queue to connect to the **electricity transmission grid** to ensure the most viable projects are prioritised is widely accepted. But the reforms themselves caused **havoc** in the **summer of 2025** and it remains to be seen if the **National Energy System Operator** can keep all parties happy while progressing the path to **Clean Power 2030**.

The **future of energy retail, gas networks and Ofgem** itself also featured heavily in our coverage in 2025, as did the continuing battle facing utilities to **change attitudes towards consumption** of both energy and water.

Utility Week Live (19-20 May, NEC, Birmingham) is built around what utility buyers need from their supply chain partners. As Europe's only pan-utility exhibition, it brings together 100% of major utilities and 4,000+ visitors. Over half of attendees authorise or influence spend, controlling more than £14bn annually.

Buyers come to discover new suppliers and meet with existing partners, and we have a range of solutions including plug and play stand space, speaking slots, thought leadership packages, and targeted workshops. **If you're serious about doing business in utilities, this is an opportunity you can't afford to miss.**

## GET IN TOUCH

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