Network Development Plan (NDP)

Methodology and Process Guide

April 2026

Network Development Plan (NDP) Methodology & Process Guide

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Date	27/02/2026	04/03/2026	19/03/2026

Version	Comment	Date
V1	First issue for Stakeholder Consultation	28/03/2024
V2	Second issue evolved from methodology to full process guide to incorporate new data analytic approaches, enhanced transparency of decisions and current governance structure.	27/02/2026
V3	Post March 2026 consultation version	24/04/2026

Information Classification	Public (ITS/600)

ID	Reference Documentation for the NDP process
INV/007	Flexibility First Policy[1]
INV/001/003	Code of Practice for Asset Management (Asset Management System)
INV/001/005	Code of Practice for the Asset & Network Planning Processes
INV/001/008	Code of Practice for the Production of Load Estimates
IMP/001/913	Code of Practice for the Economic Development of the EHV System

Contents

[1] Northern Powergrid Flexibility First Policy

1 Introduction

Northern Powergrid's Distribution System Operation (DSO) functions have been designed to deliver our RIIO-ED2 Flexibility First[2] commitments and to support economic growth and decarbonisation across the regions our network serves. Being transparent about our network planning and showing where we are enabling smart and flexible solutions alongside targeted reinforcement and the development of Flexibility Service markets, is essential for helping stakeholders understand how we can support their ambitions.

Our Network Development Plan (NDP) outlines our plans for developing the network to enable net zero in our region as shown in Figure 1. It provides information on future network developments in accordance with our Flexibility First policy, as well as opportunities for new connections. The NDP is an Ofgem standard licence condition SLC25B[3] which requires Distribution Network Operators (DNOs) to inform stakeholders of their future network developments highlighting network plans and requirements for Flexibility Services to allow stakeholders to include these insights into their planning.

This NDP process guide provides a clear explanation of the methodology we use to produce the plan. This guide is part of the Northern Powergrid (NPg) DSO/DNO Governance Framework[4] as shown in Figure 2.

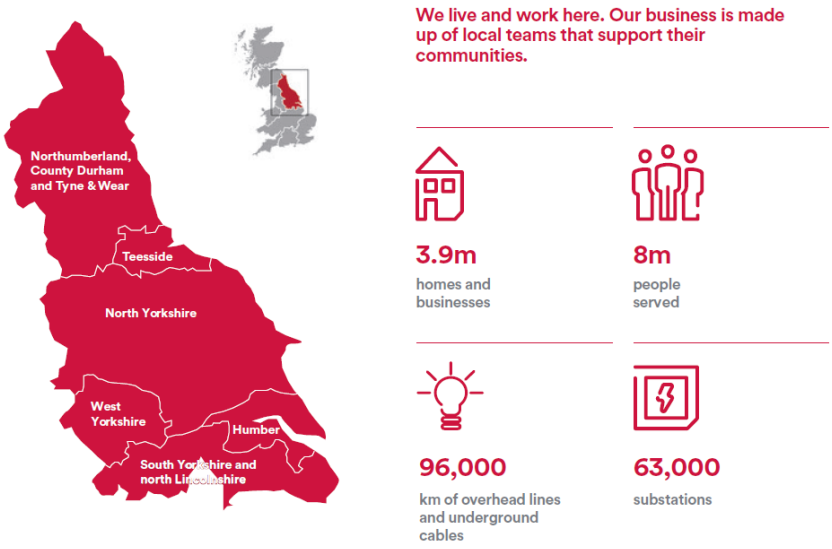


Figure 1 Northern Powergrid Network Region and Our Business

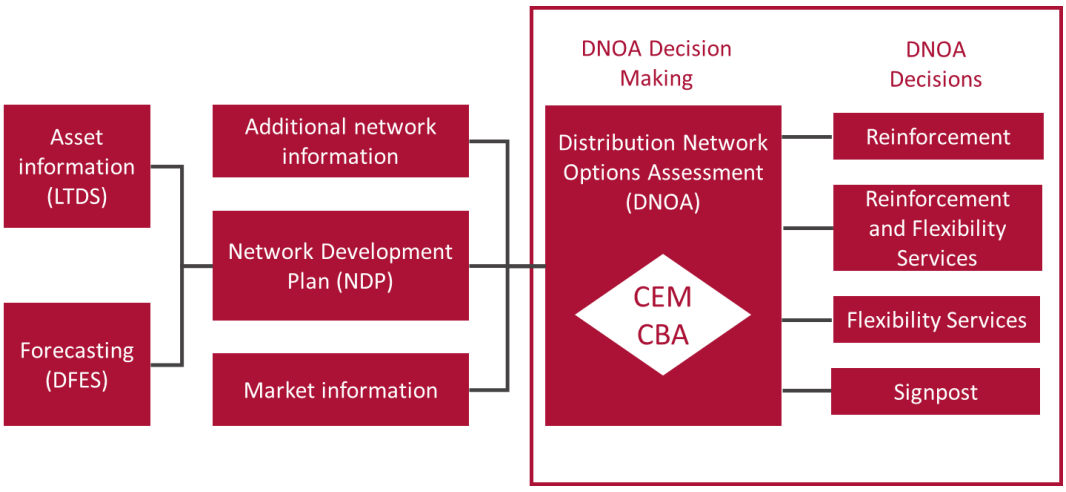


Figure 2 NDP in the context of the DSO/DNO Governance framework and Common Evaluation Method Cost Benefit Analysis (CEM CBA)

[2] https://www.northernpowergrid.com/Northern Powergrid Flexibility First Policy
[3] https://epr.ofgem.gov.uk/
[4] Northern Powergrid DSO-DNO Governance Framework

2 Decision Making Governance and Transparency

NPg's NDP outlines the decisions we have taken to invest in our network to solve constraints including those that could affect safety and those that may limit or delay customer connections. The publication of the report supports the transparency in our evidence-based decision-making for network investment.

2.1 Policy

The roles required to produce the NDP decisions are clearly defined and appropriately resourced between our DSO and DNO functions and are illustrated in Figure 3 in reference to our DSO/DNO Governance Framework.

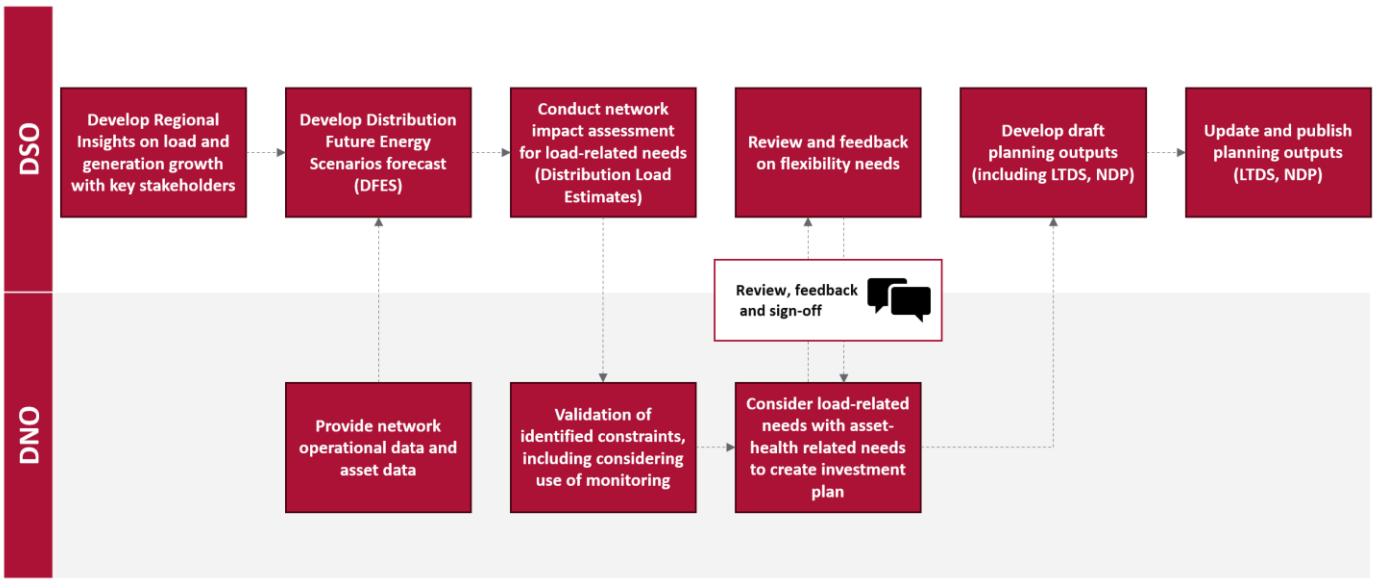


Figure 3 DSO/DNO functional roles in NPg NDP

2.2 Accountability

2.2.1 RACI matrix definitions and roles for the NDP

NPg utilises a RACI matrix to illustrate the assignment of responsibilities for business processes as outlined in Table 1 and Table 2.

Table 1 RACI Matrix

RACI	Item	Definition
R	Responsible	Responsible for the delivery of the operation
A	Accountable	Oversees the deliverable
C	Consulted	Assists the completion of the delivery with additional information or support
I	Informed	Kept up to date on the progress of the deliverable

Table 2 NPg NDP delivery RACI matrix

RACI Role	Operational Role	Department	Directorate	Sign Off level
Responsible	System Forecasting Engineer	System Forecasting	Energy Systems	Proposal
Responsible	Network Planning Engineer	Network Planning	Engineering	Proposal

RACI Role	Operational Role	Department	Directorate	Sign Off level
Responsible	Asset Planning Engineer	Investment Planning and Delivery	Engineering	Proposal
Responsible	Major Project Programme Engineer	Major Projects	Programme Delivery	Proposal
Accountable	Head of System Forecasting	System Forecasting	Energy Systems	Agreement & Final Authorisation
Consulted	Head of Network Planning & Design	Network Planning & Design	Engineering	Agreement
Consulted	Head of Commercial Flexibility	Commercial Flexibility	Energy Systems	Agreement
Consulted	Head of Investment Planning and Delivery	Investment Planning and Delivery	Engineering	Agreement
Consulted	Head of Major Projects	Major Projects	Programme Delivery	Agreement

2.3 NDP decision authorisation record

For the NDP process, all RACI roles involved record their NDP outcomes within the NPg electronic document approval process. An electronic sign-off certificate will be required before any final outcomes are progressed into publications.

2.4 Escalation

In the case of no consensus on an outcome from the RACI roles, the discussion is escalated to the Director of Energy Systems, Director of Programme Delivery and Director of Engineering for resolution and on to the NPg Executive Monthly Management Meeting if required.

2.5 Consultation

In accordance with the SLC25B, NPg consults with interested parties on the proposed NDP for a period of at least 28 days before publication of the final plan.

2.6 Assurance

Our DSO Assurance Manager provides a first-line check that we are adhering to our own policies and decision governance processes.

2.7 Transparency

All NDP outputs are published on our Open Data Portal in a timely manner. This will be no later than one month after conclusion of consultation and final plan decisions.

3 NDP in context

3.1 The Network Development Decision-Making Process

To efficiently meet growing electricity demand, NPg invests in its network via a Flexibility First[5] policy. As described in Figure 4, we monitor our network and employ flexibility solutions, including Flexibility Services, Flexible Connections and Network Flexibility to manage constraints in preference to network reinforcement wherever it can be demonstrated as the most efficient and economical overall outcome for network customers.

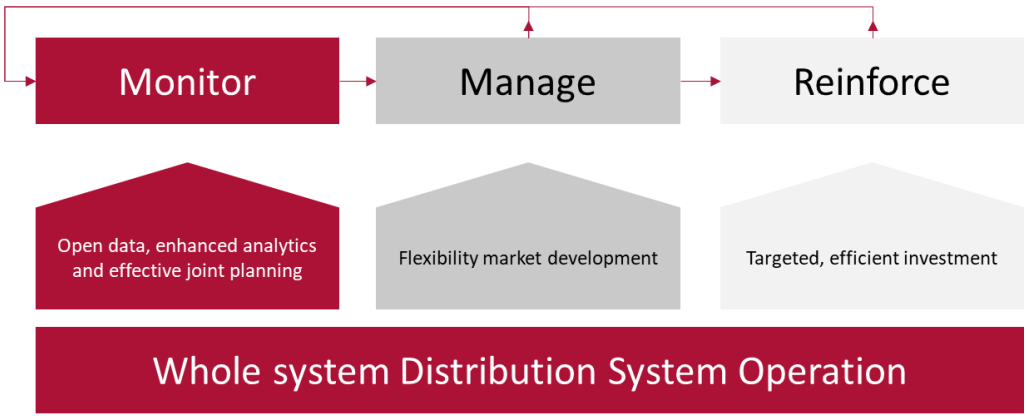
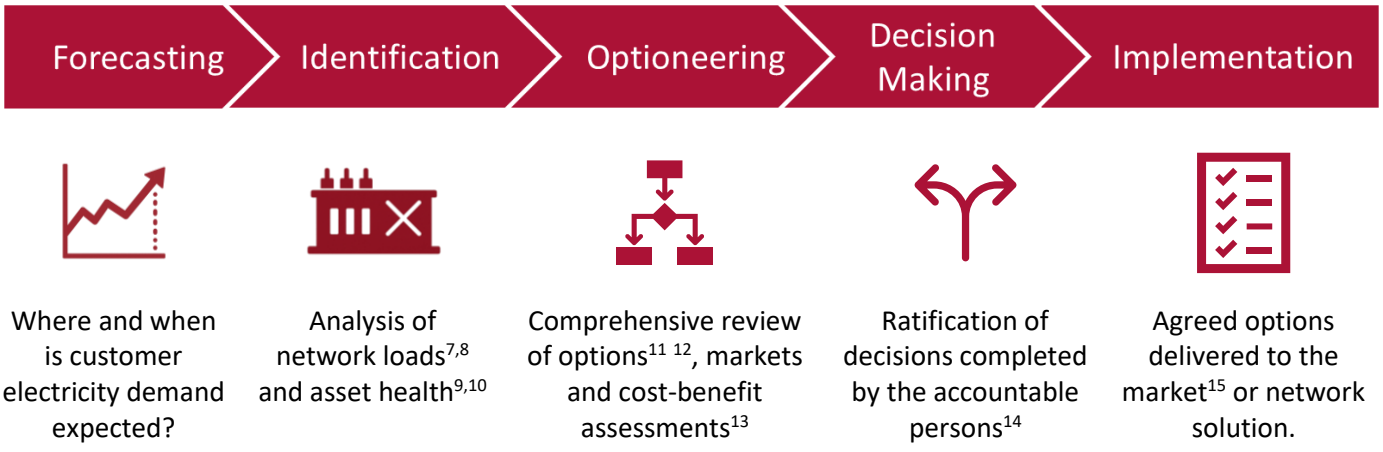


Figure 4 NPg monitor, manage, reinforce approach to optimise network utilisation and flexibility

There are five sequential steps to form the inputs and decisions required for the network development process via the Distribution Network Options Assessment process (DNOA) [6]. The DNOA process is carried out every six months and published on our Open Data Portal for full transparency of the latest decisions. The outputs from the DNOA are inputs into our NDP.



[5] https://www.northernpowergrid.com/Northern Powergrid Flexibility First Policy
[6] https://northernpowergrid.opendatasoft.com/api/datasets/1.0/distribution-network-options-assessment-dnoa/attachments/northern_powergrid_dnoa_methodology_pdf/
[7] IMP/001/913 NPg Code of Practice for the Economic Development of the EHV System
[8] INV/001/008 NPg Code of Practice for the Production of Load Estimates
[9] INV/001/003 NPg Code of Practice for Asset Management (Asset Management System)
[10] INV/001/005 NPg Code of Practice for the Asset & Network Planning Processes
[11] INV/001/016 – Code of Practice for the Network Serviceability Review process
[12] https://northernpowergrid.opendatasoft.com/api/datasets/1.0/distribution-network-options-assessment-dnoa/attachments/northern_powergrid_dnoa_methodology_pdf/
[13] https://www.energynetworks.org/publications/common-evaluation-methodology-tool-and-supporting-materials
[14] Decision Making Governance and Transparency
[15] https://www.piclo.com/

3.2 NDP benefits

The NDP provides transparency about our whole system investment decision-making processes and our network development plans. By publishing this information, our customers and stakeholders are kept informed and empowered to:

- Align their development plans with ours to power our region's economic progress and decarbonisation.
- Understand our Flexibility Service requirements and participate in the Flexibility Services market.
- Plan connections where there is available capacity or plan them where there are opportunities to provide network services.
- Provide feedback to the NDP process.

The requirements of the NDP are set out by the ENA Form of Statement (FoS)[16] under Ofgem standard licence condition SLC25B[17] which requires Distribution Network Operators (DNOs) to inform stakeholders of their future network developments through the NDP

3.3 Other network reports

The NDP is one in a series of reports and dataset publications to provide transparency to stakeholders on

- Demand growth forecasting
- Flexibility Services procurement
- Network development decisions
- Embedded capacity connected to the network

More information on these additional published reports as well as their frequency of update can be found in Appendix A Distribution network data and capacity reports.

3.4 The components of the NDP

Our NDP follows the structure set out by the Energy Networks Association's (ENA) form of statement (FoS) of NDP[18] and provides information in compliance with standard licence condition (SLC25B).

The NDP is comprised of three publications:

[16] https://www.energynetworks.org/publications/on21-ws1b-p5-network-development-plan-(ndp)-form-of-statement-template-and-process
[17] https://epr.ofgem.gov.uk/
[18] https://www.energynetworks.org/publications/on21-ws1b-p5-network-development-plan-(ndp)-form-of-statement-template-and-process

Table 3 Components of NPg's Network Development Plan

Component	Main objective
Network Development Report (NDR)	Provides information on project delivery of new infrastructure to be installed and upcoming Flexibility Services opportunities Provide details of major network developments for the next ten years to allow stakeholders to plan and forecast accordingly
Network Headroom Report (NHR)	A substation site by site list that indicates where it is anticipated that there will be network capacity to accommodate future connections (demand or generation) and where flexibility services may be required
Network Development Plan (NDP) Methodology	The methodology has been developed into a full process guide (this document). It serves to provide transparency for the approach, data inputs and decision points provided in the NDP. The method described in the process guide covers the end-to-end process which provides sufficient detail to allow stakeholders to understand sensitivities and extrapolate the NDP results.

3.5 Mapping tRESP to DFES

We align our Distribution Future Energy Scenarios (DFES) used to forecast future demand with NESO Future Energy Scenarios (FES)[19] in accordance with commitment agreed via the ENA[20]. In 2025, the FES approach evolved from scenarios to pathways. The pathways consider ways that Great Britain can reach a net zero energy system and interim emissions reductions along the way. They explore the choices and uncertainty ahead in areas such as the speed of technology uptake, the role of both electrification and low carbon fuels and the level of consumer engagement.

In addition to the national FES, to support local energy planning NESO are now publishing Regional Energy Strategic Plans (RESPs)[21]. In 2026, NESO published their first RESPs entitled transitional RESP (tRESP) [22] including LCT uptake pathways. The tRESP informs energy distribution network planning in the short term, and the full RESP approach will be in place from 2028.

The tRESP pathways used by NPg to inform their NDP are as follows:

- Short-term pathway (from 2025 to 2035) – Holistic Transition
- Three long-term pathways (from 2036 to 2050)
  - Holistic Transition
  - Electric Engagement
  - Hydrogen Evolution

Our NDP also reflects FES's fourth scenario, Falling Behind, which follows the slowest credible decarbonisation pathway and fails to meet the UK's legislated Net Zero target by 2050. More information on the definition of these pathways can be found in the appendices.

[19] https://www.neso.energy/publications/future-energy-scenarios-fes
[20] ON22-WS1B-P2 FES and DFES Purpose of Energy Scenarios (30 May 2022).pdf
[21] https://www.neso.energy/what-we-do/strategic-planning/regional-energy-strategic-planning-resp/transitional-regional-energy-strategic-plan-tresp
[22] https://www.neso.energy/data-portal/tresp-demand-pathways

4 Network Development Report (NDR)

The NDR provides information on all authorised major network infrastructure developments and any upcoming Flexibility Services opportunities. These details allow stakeholders to plan and forecast accordingly. This information uses the most recent version of the Long-Term Development Statement to ensure that the data and information used for the NDP is consistent.

Table 2 Scope of the NDR

Scope	Details
Date range	Authorised and planned interventions for the next 10 years.
Frequency of updates	Every two years with consultation in April and publication in May.
Network coverage	The report covers information for all NPg licence areas at each primary substation and supply point[23].
Report detail and granularity	**Network infrastructure:** ▪ Location of intervention ▪ Outline of the planned works ▪ Reason for carrying out works ▪ Impact on the distribution system capability ▪ Equipment ratings (for transformers, the existing and new rating) ▪ Expected start and completion date (as of time of publication of NDP) **Flexibility Services:** ▪ Location of flexibility service need ▪ First year of forecasted flexibility service need

[23] Network constraints at the Grid Supply Points (GSPs) are out of the NDP scope and are not included our network reports. Transmission network capacity is not factored into our headroom calculations.

5 Network Headroom Report (NHR)

The Network Headroom Report uses each of the four DFES customer demand pathways. Our 2026 DFES aligns with the tRESP short term Holistic Transition pathway up to 2035 and the Holistic Transition, Electric Engagement and Hydrogen Evolution pathways from 2035 onwards.

Table 2 Scope of the NHR

Scope	Details
Date range	The NHR provides forecasts on demand and generation network capacity headroom up to and including 2050 thus aligning to the final year of the DFES forecast. Every year's forecast is presented for the first ten years. Subsequent forecasts up to 2050 are presented (at least) for every fifth year.
Frequency of updates	This report is published annually in May.
Network coverage	The report covers information for all NPg licence areas at each primary substation and supply point[24].
Report detail and granularity	▪ Demand and generation headroom (available capacity) is presented in megawatts of headroom (MW) per reported year per forecasted t-RESP-aligned pathway and Falling Behind scenarios. ▪ Headroom calculations consider thermal loading and fault level constraints. ▪ Financially approved network developments in delivery or delivery-planning stage are included[25].

6 Considerations and Limitations

1. The NDP focuses on the higher voltage primary network and major interventions. Significant work will also occur on low voltage (LV) networks to support residential EV and heat pump uptake. LV needs are a key driver of high voltage (HV) capacity requirements, but LV data is not reported in the NDP
2. Constraints at Grid Supply Points (GSPs) fall outside the NDP scope and are not included in our headroom assessments. Transmission network capacity is therefore not reflected in our calculations.
3. Headroom results do not include capacity released through Active Network Management (ANM). For example, the Driffield ANM scheme in the Yorkshire license area manages the export from several generators to ensure that the power flows within the Driffield 66kV network and the local 132kV network remain within their design limits.
4. Headroom forecasts remain subject to change as customer generation and demand evolve, reflecting the uncertainty inherent in the transition to net zero

Although every effort has been made to ensure the accuracy of the data provided in this NDP, NPg does not accept any liability for the accuracy of the information contained herein, and neither NPg nor its directors or its employees shall be under any liability for any misstatement or opinion on which the recipient of this statement relies or seeks to rely.

[24] Network constraints at the Grid Supply Points (GSPs) are out of the NDP scope and are not included our headroom reports. Transmission network capacity is not factored into our headroom calculations.

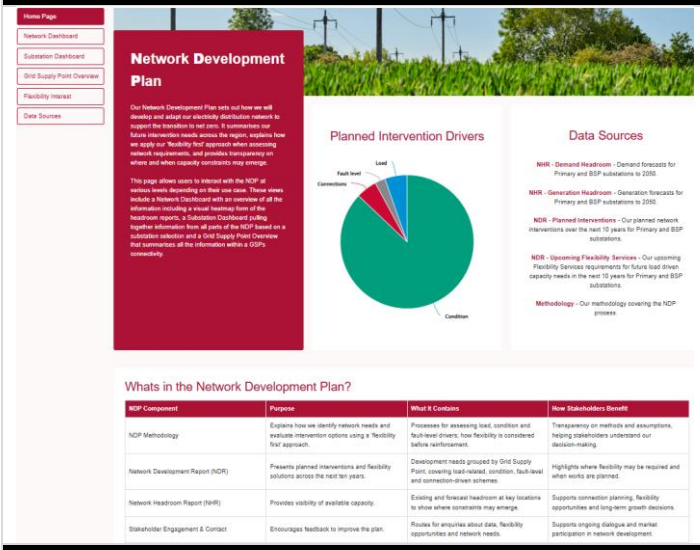
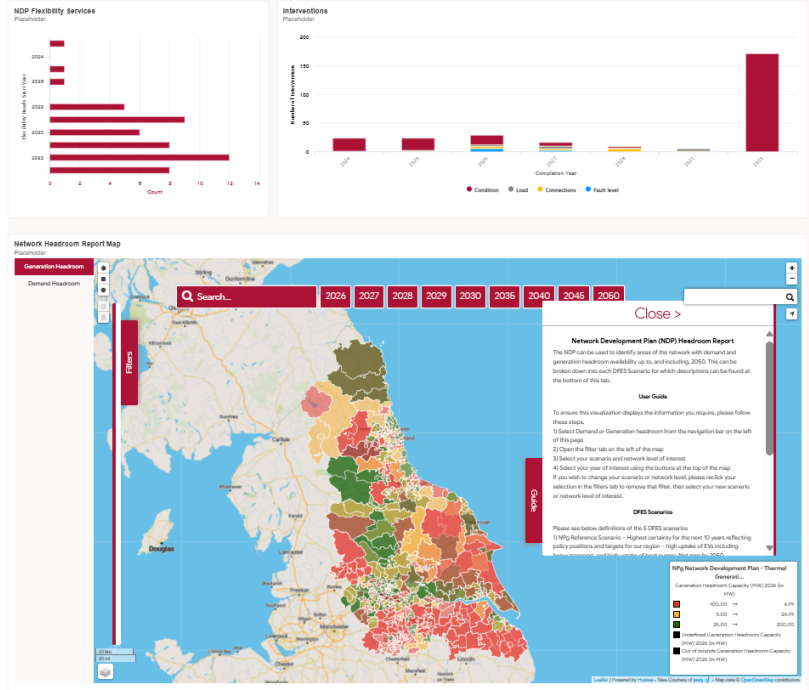
[25] This may include updates in network developments in the timeframe 0-5 years which were not included in the latest LTDS (November). If included, this must be stated in the accompanying notes and updated in the next LTDS (end May).

7 Interactive Publication

To complement the NDR and tables published on our website, we have developed an interactive NDP report template that enables us to present and share data on a consistent basis and report on our outputs for each named site or wider scheme. The main features of our NDP reports are explained below as guidance for users.

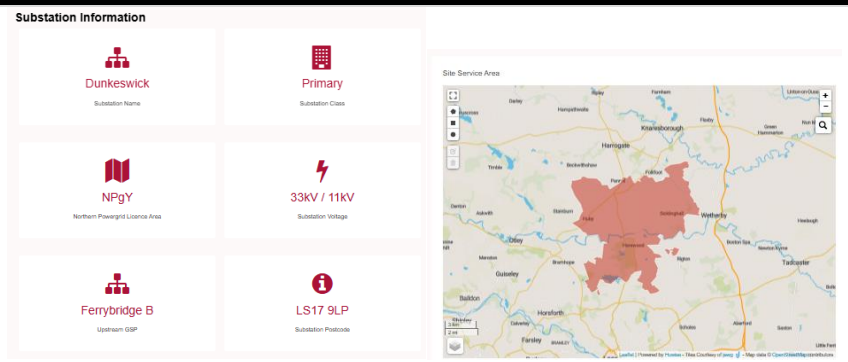
- The interactive report is published on NPg's Open Data Portal.
- This can be accessed directly via this link https://northernpowergrid.opendatasoft.com/pages/network_development_plan/
- By going to the main Open Data Portal page and searching **NDP.** The data is available in various formats https://northernpowergrid.opendatasoft.com/pages/home/
- There is the opportunity to access the data directly via download or interacting directly via API

Figure 5 shows our NDP interactive report structure and the information it presents.

NDP Interactive Publication – layout information	
Home Page	
	The user can drive through the report using the menu tab on the left of the screen. In the home page, an introductory section, providing context and details on the Plan, including its components and their purpose. The Data Sources section includes links to each of the source data sets for each component. Or alternatively the Data Source Tab on the menu takes the user to an embedded data browser.
Network Dashboard	
	This is a full network review of the outcomes of the NDP. Three graphical visualisations are presented. 1. The number of new potential Flexibility Service opportunities forecasted to start in that year due to load related demand 2. The number of authorised and planned major interventions by the start year 3. Access to the NHR heat maps for Generation and Demand with information on how to use the forecasts. This section will be updated annually.

NDP Interactive Publication – layout information

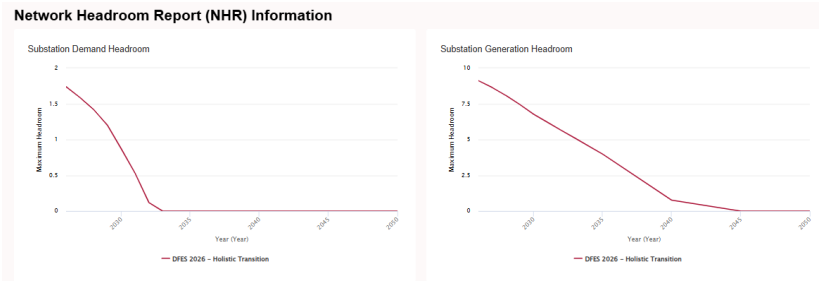
Substation Dashboard



This section allows users to select a site of particular interest and drill down into the details for that site. The drill down is available for;

1. all sites
2. just sites with interventions
3. just sites with potential for upcoming Flexibility Services.

When a site is selected, substation information is displayed listing its class, licence area, voltage, postcode and upstream GSP. An interactive map of the approximate geographical area supplied by that substation is also shown.



This section also presents the NHR Generation and Demand forecast details for this substation for each DFES pathway.

Network Development Report - Upcoming Flexibility Services

Substation	Grid Supply Point	Scheme Status	Driver	Start Year
Dunkeswick 33/11kV	Ferrybridge B	Signposted	Load	2029

Network Development Report - Planned Interventions

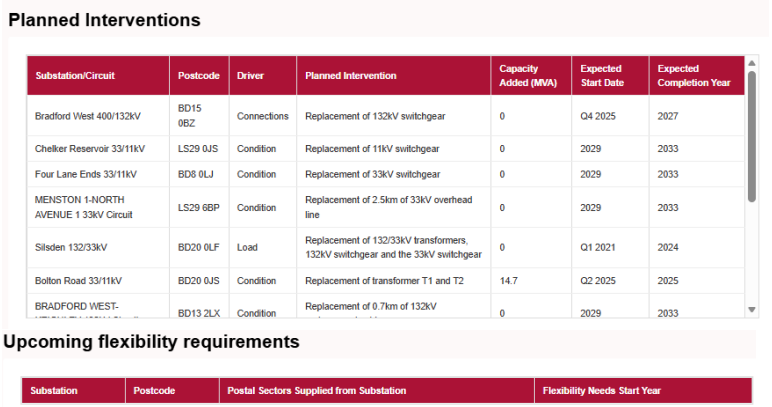
Substation	Grid Supply Point	Planned Intervention	Driver	Completion Year
Gibson Lane	Creyke Beck	Replacement of 11kV switchboard	Connections	2026
Gibson Lane	Creyke Beck	Replacement of 33kV Transformer T1&T2	Condition	2033

Details on the NDR are shown here too.

1. signposting the start of any upcoming flexibility services opportunities.
2. When and what planned interventions are due*

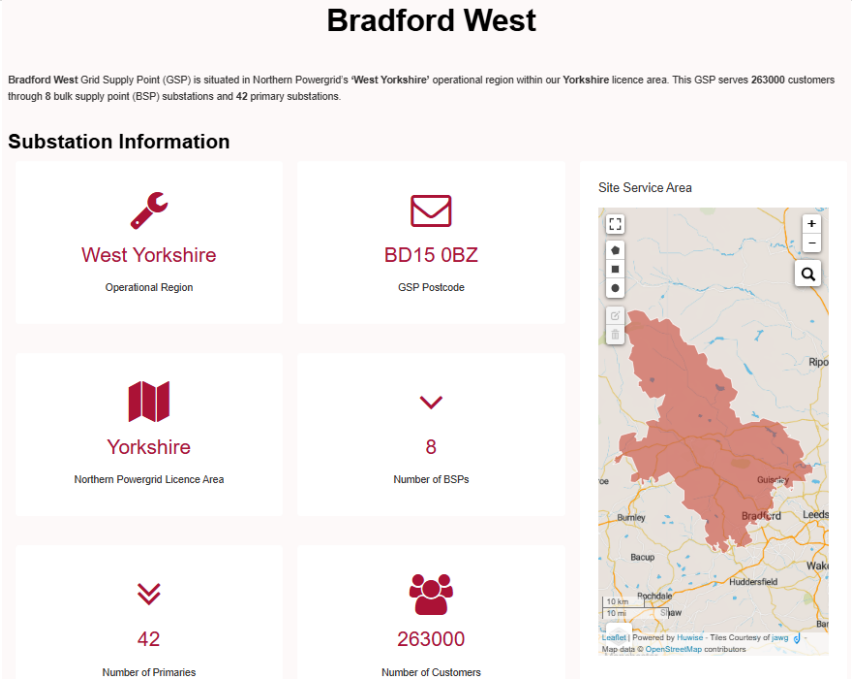
*as not all sites have planned interventions a different substation site is chosen for illustration purposes only.

Grid Supply Point Overview



To provide a wider context of the network development, the data is summarised also by Grid Supply Point area.

NDP Interactive Publication – layout information

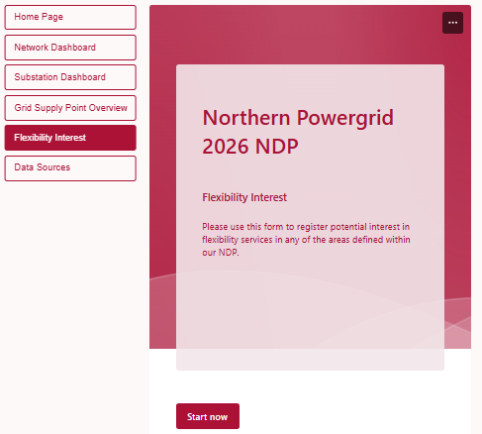


Grid Supply Point Overview Continued.

When a site is selected, GSP information is displayed listing its operational region, licence area, the total number of downstream supply points and primary sites, its post code and the total number of customers served by this substation.

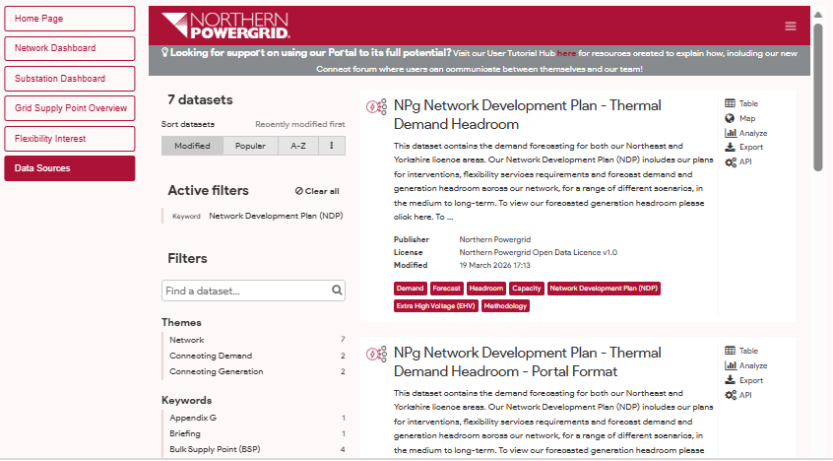
An interactive map of the approximate geographical area supplied by that substation is also shown.

Flexibility Interest



The Flexibility Interest tab allows users to register their interest in being involved in Flexibility Services opportunities. Options include highlighting a particular area of interest and providing details of their flexibility assets. This registration goes directly to our Commercial Flexibility team.

Data Sources



This tab provides a link to an embedded screen of our data browser filtered for NDP data sources.

This allows users to explore the data without leaving the report itself.

Alternatively, users can drive straight to the data of interest directly from the Home Page - Data Sources section.

Figure 5 NPg Example of NDP report on our Open Data Portal

8 Stakeholder engagement

To ensure stakeholders are kept up to date on the long-term plans for our network, we publish the NPg's NDP report every two years on our Website and Open Data Portal.

8.1 Consultation

In accordance with SLC25B, NPg consults with interested parties on the proposed information that informs the Network Development Plan for a period of at least 28 days before publication of the final plan and reports.

We will utilise our open data portal to publish the information to allow stakeholders to explore our information fully. The stakeholders will be invited to provide feedback via a consultation questionnaire and an online stakeholder event.

Table 4 Consultation Questions in NDP 2026

	Questions	Options
1	How do you anticipate using the data presented in the Network Development Plan?	
2	Is the data in the plan presented in a way that was easy for you to understand?	a. Yes b. No c. Other (Comment)
3	Which formats of the data were most helpful for your analysis or decision-making? (please select all that apply)	a. Network Dashboard b. Substation Dashboard c. Grid Supply Point Overview d. Individual Data Source Spreadsheets e. Other (Comment)
4	Does the refreshed methodology provide sufficient transparency on the NDP processes and accountabilities?	a. Yes b. No c. Other (Comment)
5	Is the information provided on local capacity, future flexibility opportunities, and planned works clear and detailed enough for your needs?	a. Yes b. No c. Other (Comment)
6	Is there anything you'd like to comment on regarding the demand and generation headroom methodology?	a. Yes (comment) b. No
7	Are there changes or additions that would make the Network Development Plan clearer or more useful for your organisation?	

8.2 Feedback

We welcome your feedback.

- If you have any questions or suggestions on the NDP methodology and process guide, please contact the team at system.forecasting@northernpowergrid.com
- If you have any questions or suggestions on the NDP interactive report, please contact the Open Data team at open.data@northernpowergrid.com

Appendix Technical Specification

i. Glossary

Table 5 Glossary of acronyms

CBA	Cost Benefit Analysis
CEM	Common Evaluation Methodology
DFES	Distribution Future Energy Scenarios
DNO	Distribution Network Operator
DNOA	Distribution Network Options Assessment
DSO	Distribution System Operation
ECR	Embedded Capacity Register
EHV	Extra High Voltage
ENA	Energy Networks Association
LCT	Low Carbon Technology
LTDS	Long Term Development Statement
NESO	National Energy System Operator
NDP	Network Development Plan
Ofgem	Office of Gas and Electricity Markets (Regulator)
RESP	Regional Energy Strategic Plan
RIIO	Revenue = Innovation + Incentives + Outputs
tRESP	Transitional Regional Energy Strategic Plan

ii. Distribution network data and capacity reports

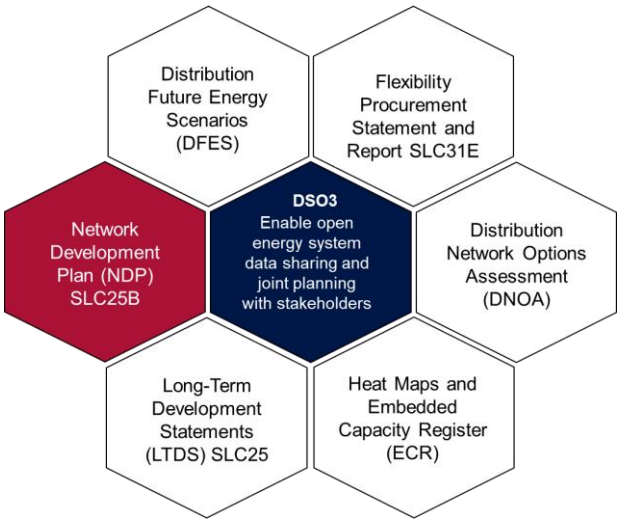


Figure 6 Distribution network data and capacity reports

Table 6 Distribution network data and capacity report description

Data/Report/Statement	Publication Frequency	More information
Distribution Future Energy Scenarios (DFES)	Annually	Produced once a year, in alignment with NESO's FES and RESP. NPg uses the RESP to inform a detailed breakdown of energy demand forecasts, low carbon technology (LCT) uptake by customers and embedded generation in the regions covered by NPg. Details are published on our Open Data Portal.
Distribution Flexibility Services Procurement Statement and Report – SLC31E	Annually	Outlines how NPg plans, procures, and evaluates flexibility services to help manage local electricity demand and constraints. It explains procurement processes, market engagement, and market outcomes to support efficient, reliable, and cost-effective operation of the network. The Statement is published in March and provides information on plans for the coming regulatory year. The Report is published in April and reports upon activities completed in the previous regulatory year. Details are published on our Open Data Portal.
Distribution Network Options Assessment (DNOA)	Bi-Annually	This report presents NPg's decisions and needs on short-term plans for the use of flexibility and conventional reinforcement to manage network capacity. This information is updated every 6 months (indicatively March and October). Details are published on our Open Data Portal.

Data/Report/Statement	Publication Frequency	More information
Embedded Capacity Register[26]	Monthly (within 10 working Days following the end of each month)	Our Embedded Capacity Register (ECR) contains information on all generation, storage and flexible demand assets which are either already connected or accepted to connect to the NPg network. The ECR has two parts: a) for assets which have an installed capacity of less than 1MW, and greater than or equal to 50kW (b) for assets which have an installed capacity of 1MW or greater. Details are published on our Open Data Portal.
Heat Map[27]	Monthly (within 10 working Days following the end of each month)	Visual tool showing the available network capacity at different substations or network locations. It helps developers and local authorities understand where the network has headroom for new connections and where constraints exist. The Heat Maps are published on our Open Data Portal.
Long Term Development Status (LTDS)	Annual	The NPg Long-Term Development Statement (LTDS) is compiled in accordance with Standard Condition 25 of the Electricity Distribution Licence. The LTDS and the supporting files contain network information to assist existing and future users of the network to assess opportunities for new or additional connections. The LTDS is updated and published each year and is made available to stakeholders before the end of November. There is an interim update made to several of the data tables included within the LTDS; this update is made available to stakeholders before the end of May. Details are published on our Open Data Portal.

[26] https://www.dcusa.co.uk/embedded-capacity-register

[27] ON22-WS1A-P8 Recommendation for frequency of updates to constraint information heatmaps (25 Mar 2022) – Energy Networks Association (ENA)

iii. NESO FES Pathway Descriptor

Table 2 NESO FES Pathway descriptors[28]

NESO FES / tRESP Pathway	Pathway Descriptor
Short Term	Short Term Pathway for 2025 to 2035. This single pathway provides a strategic view to support investment decisions over multiple regulatory periods. The tRESP Short-Term Pathway is informed by each the DNO's DFES Holistic Transition scenario, adjusted by NESO for consistency and alignment. Holistic Transition assumes high renewables and high consumer engagement, and Ofgem previously advised that it should be used for transmission network planning[29].
Holistic Transition	Net zero is met through a mix of electrification and hydrogen, with hydrogen mainly used around industrial clusters. Hydrogen is not used for heat except as a secondary fuel for heat networks in small quantities. Consumer engagement is very strong through adoption of energy efficiency improvements and demand shifting, with smart homes and electric vehicles providing flexibility. A high-renewable capacity pathway, with unabated gas dropping sharply. Pathway sees moderate levels of nuclear capacity and lowest levels of hydrogen dispatchable power. Supply-side flexibility is high, delivered through electricity storage and interconnectors. No unabated gas remains on the network in 2050.
Electric Engagement	Net zero is met mainly through electrified demand. Consumers are highly engaged in the transition through smart technologies that reduce energy demand, such as electric heat pumps and electric vehicles. Pathway with the highest peak electricity demand, requiring high nuclear and renewable capacities. It also has the highest level of bioenergy with carbon capture and storage across all net zero pathways. Supply side flexibility is high, delivered through electricity storage, interconnectors and low carbon dispatchable power.
Hydrogen Evolution	Net zero is met through fast progress for hydrogen in industry and heat. Widespread access to a national hydrogen network is assumed. Some consumers will have hydrogen boilers, although most heat is electrified. There are low levels of consumer engagement within this pathway. Hydrogen is used for some heavy goods vehicles, but electric vehicle uptake is strong. Pathway sees high levels of hydrogen dispatchable power plants, leading to reduced need for renewable and nuclear capacities. Hydrogen storage provides the most flexibility in this pathway.
Falling Behind	Falling Behind represents the slowest credible progress towards decarbonisation but does not meet net zero by 2050 reflecting limited policy action, slower consumer and technology uptake, and reduced ambition compared with other pathways.

[28] https://www.neso.energy/publications/future-energy-scenarios-fes
[29] https://storymaps.arcgis.com/stories/27c63c4bfdc4413aa5bd560a472f6586