

SIF Matchmaker

Final Report

Matchmaker innovation project

Matchmaker is an innovation project led by National Grid Electricity Distribution, Regen and TPXimpact. The discovery phase sought to validate the need for a digital service to support community organisations and developers to set up shared ownership schemes.

Funded through the Strategic Innovation Fund (SIF), an Ofgem programme managed in partnership with Innovate UK, Matchmaker responds to **SIF Challenge 4** by exploring whether shared ownership could help improve public support for, and reduce opposition to, new energy infrastructure.

Project partners

About National Grid Electricity Distribution

The UK's largest electricity distribution network that serves nearly 8 million customers in the Midlands, South West and Wales, delivering essential power to millions of homes and businesses across its regions.

About TPXimpact

TPXimpact is a digital transformation company supporting public, private and third-sector organisations to build a better future for people, places and the planet.

About Regen

Regen provides independent, evidence-led insight and advice in support of its mission to transform the UK's energy system for a net zero future. It focuses on analysing the systemic challenges of decarbonising power, heat and transport. It applies its expertise to the whole energy system to advocate for a fast and fair transition to net zero.

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Introduction

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Introduction

Project purpose and rationale

As the UK accelerates renewable energy deployment, there is growing interest in how communities can participate in and benefit from the transition. Shared ownership offers one route, by giving communities a financial stake in renewable energy projects. However, uptake remains limited by barriers around incentives, timing, finance, capacity and trust. Matchmaker was developed to test whether a digital service could support community organisations and developers to connect earlier and progress more shared ownership opportunities.

Discovery aims

- Validate the business case and the need for a Matchmaker service
- Define service features, data needs and user journeys
- Identify policy, regulatory and delivery barriers
- Recommend a business model and service owner
- Assess the evidence on whether shared ownership could support public acceptance of grid infrastructure
- Set out next steps for alpha phase

Desired impacts

- Increase the number of shared ownership schemes
- Enable more communities to participate in the energy transition
- Increase public acceptance of new energy infrastructure through shared ownership.

Renewed policy momentum

While the policy framework is still evolving, shared ownership is benefiting from renewed UK government support.

Early policy ambition

The UK government first set out an ambition for shared ownership to become the “norm” for renewable energy developments in 2014.¹ This was followed by the Shared Ownership Taskforce, which provided recommendations on how to support shared ownership. The UK government adopted a voluntary approach, backed by reserve powers to introduce legislation if progress proved insufficient.²

Progress was mixed

In England, the introduction of the de facto onshore wind ban reduced opportunities for new shared ownership schemes. Scotland and Wales continued to support local and shared ownership through policy, guidance and support programmes. The Scottish Government set an ambition for at least half of newly consented renewable energy projects to have an element of shared ownership, while the Welsh Government expected new energy projects to include an element of local ownership.³⁻⁴ Even so, uptake remained below policy ambitions across Great Britain.⁵⁻⁶

Renewed policy support

Since 2024, the UK government has renewed its focus on local and community energy by lifting the de facto ban on onshore wind in England, establishing Great British Energy, a new publicly owned energy company, and developing the Local Power Plan.⁷⁻⁹ The Local Power Plan includes a commitment to consult on proposals for a mandatory shared ownership offer.

This renewed policy momentum creates new opportunities to deliver shared ownership at scale. The next challenge is ensuring communities can benefit from the projects already moving through development.

Shared ownership and local power ambitions

Clean Power and GB Energy

The UK government has set an ambition to deliver a clean power system by 2030, requiring a significant expansion of renewable generation across the UK.⁷

Alongside this mission, Great British Energy and the Local Power Plan aim to accelerate the growth of local and community energy, with ambitions to deliver 8 GW of capacity and support more than 1,000 projects by 2030.^{8,9} Shared ownership is expected to play an important role in achieving these ambitions.

The 2030 connections pipeline

However, much of the renewable generation needed to deliver Clean Power 2030 is already in development and has secured a place in the grid connection queue (737 to 770 GW, with 200-225 GW needed for 2030), limiting opportunities for new standalone community-owned projects.¹⁰⁻¹¹

Scaling local ownership

In this context, shared ownership could provide a scalable route for communities to participate in renewable energy projects already moving through development. This strengthens the case for a service that helps developers and communities identify, develop and deliver shared ownership opportunities.

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Research and engagement approach



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Discovery phase main workstreams

We took an agile, user-centered and collaborative approach to developing this service.

The discovery phase had three linked phases, moving from problem framing to user research to solution design.

Phase 1: As-is mapping

Established the foundation by mapping the existing ecosystem, defining the problem for different stakeholders and assembling an advisory board.

Phase 2: User research

Deeply validated the need and explored solutions, features, and policy/business model options with target users. Checked and challenged findings with the advisory board.

Phase 3: Solution design and alpha scoping

Synthesised all findings, developed a high-level service design, cost/benefit analysis, business model and governance, and prepared a clear, scoped plan for the alpha phase.

The Matchmaker service

We created a high-level service concept visual to help us test our ideas with target users and wider sector stakeholders.

Matchmaker

A digital service supporting community organisations & developers to set up shared ownership schemes by:



Research approach

The discovery phase explored whether there is a clear need for a digital matchmaking service to support shared ownership, and what such a service would need to do in practice. The findings presented in this report draw on evidence review, stakeholder interviews and wider sector engagement.

Evidence review

We reviewed existing evidence on shared ownership models, the policy landscape, the benefits of shared ownership and the barriers that limit uptake. The review also explored research on public acceptance of grid infrastructure.

Stakeholder interviews

We carried out 19 semi-structured interviews with community energy organisations, developers and community support organisations to test and validate the need for a digital Matchmaker service.

Interviews explored:

- Experiences of shared ownership
- Barriers and drivers of participation
- Gaps in support across the shared ownership journey
- Feedback on the Matchmaker service concept.

Show and tells

We held two public show and tell events to engage stakeholders from across the sector. The first attracted over 240 registrations and more than 140 attendees who helped to test and refine the Matchmaker concept. The second, held in August, attracted over 140 registrations and around 90 attendees despite the summer holiday period, and was used to share discovery findings and gather feedback.

Show and tell recordings available here: [Initial event](#) | [Final event](#)

Interview sample

Participants were recruited from the target end user groups of the Matchmaker service: community energy organisations, developers and community support organisations. The sample was designed to capture perspectives across England and Wales, reflecting National Grid Electricity Distribution's licence area, while also including organisations from elsewhere in Great Britain to reflect the potential for a future national service.

How participants were selected

Community energy organisations (those with experience of community energy or shared ownership) were prioritised during discovery. References to "community organisations" elsewhere in this report reflect the broader range of organisations that could use a future version of the service. Community energy organisations were identified through Regen's network and desk-based research. A longlist was prioritised by reviewing community benefit activities and Index of Multiple Deprivation (IMD) data to help ensure representation from organisations supporting areas experiencing higher levels of need.

Developers were selected to reflect different levels of shared ownership experience, while community support organisations were selected for their experience supporting communities across multiple shared ownership projects.

19 interviews across 3 potential user groups

- 9 Community energy organisations
- 7 Developers*
- 3 Community support organisations

*Includes one local authority.

Profile of participating community energy organisations

Ahead of the interview, a short survey was used to gather additional information about community energy organisations, in an effort to better understand the current landscape and identify where there may be gaps in representation that the future service might address.

Our sample included organisations with varied operational and membership sizes, although younger adults and people from minority ethnic or culturally diverse backgrounds were underrepresented on governing bodies.

- **Organisational scale**

The ten organisations varied substantially in staffing and volunteer resources. Four (40%) had more than 20 people involved, three (30%) had 6–10, two (20%) had 0–5, and one (10%) had 11–20.

- **Membership reach**

Three organisations (30%) had fewer than 10 active members or participants, three (30%) had more than 500, and two (20%) had 151–500. One (10%) had 10–50 and one (10%) had 51–150.

- **Governing body representation***

Five organisations (50%) reported representation from a range of socio-economic backgrounds, while three (30%) included people from minority ethnic or culturally diverse backgrounds. Three (30%) selected “None of the above”, and one (10%) preferred not to say. None reported representation of younger adults under 30.

*For representation, respondents could select more than one option, so percentages do not sum to 100%.

Advisory board

An advisory board was established to provide strategic challenge and expert input throughout the discovery phase. The board was carefully selected to bring together organisations with expertise in policy, regulation, community energy, renewable energy development and energy system planning, ensuring the project reflected a broad range of perspectives from across the shared ownership ecosystem.

The advisory board met twice during Discovery and played an important role in shaping the project. Its contribution is summarised below.

Advisory board contribution

- Validated and challenged emerging research findings
- Refined business model and governance options
- Tested future policy and service scenarios
- Helped shape recommendations for alpha development.

Membership included representatives from:

- **Government and funding bodies** (DESNZ, GB Energy, Welsh Government Energy Service, Local Energy Scotland)
- **Regulation and system planning** (Ofgem, NESO)
- **Community energy sector organisations** (Community Energy England, Community Energy Wales)
- **Renewable energy companies** (Thrive Renewables and Nadara)
- **Community energy organisation** (Awel Aman Tawe)
- **Community support organisation** (Empowered Projects)

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As-is mapping

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Shared ownership and support for grid infrastructure

To inform our work on SIF Challenge 4, we reviewed the evidence on what drives support for, and opposition to, energy infrastructure.

Grid infrastructure research consistently finds that public responses are shaped by more than the infrastructure itself. Trust, fairness, participation, local context and perceived benefits all influence how projects are received.

See the full evidence review [here](#).

Key findings

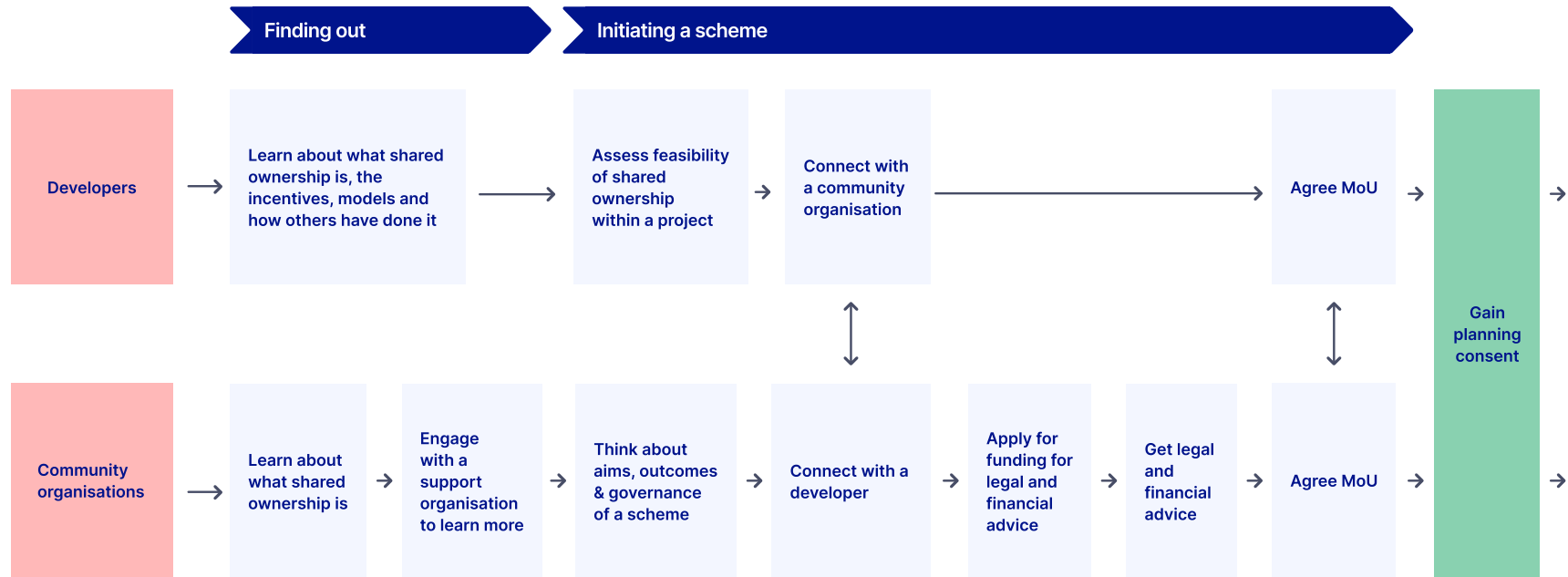
- People may support net zero and grid expansion in principle while still opposing specific projects in their local area.¹²⁻¹⁵
- People are more supportive when the need for infrastructure is clearly explained and they trust those responsible for delivering it.¹⁶⁻¹⁹
- Community concerns often focus on fairness, participation and local impacts. Research suggests that opposition frequently reflects questions about decision-making, influence and who benefits, rather than simple resistance to development.²⁰⁻²⁴

- Responses to infrastructure are shaped not only by what is built, but by where it is built and how it affects places that people value.²⁵⁻²⁷
- Benefits alone rarely build support. Their value depends on whether they are perceived as fair, meaningful and locally shaped.²⁸⁻³²

Many factors linked to project acceptance, including trust, fairness, participation, influence and local benefit, align closely with shared ownership models.³³⁻³⁴ However, little direct evidence exists linking shared ownership to improved acceptance of grid infrastructure, making it an important area for testing.

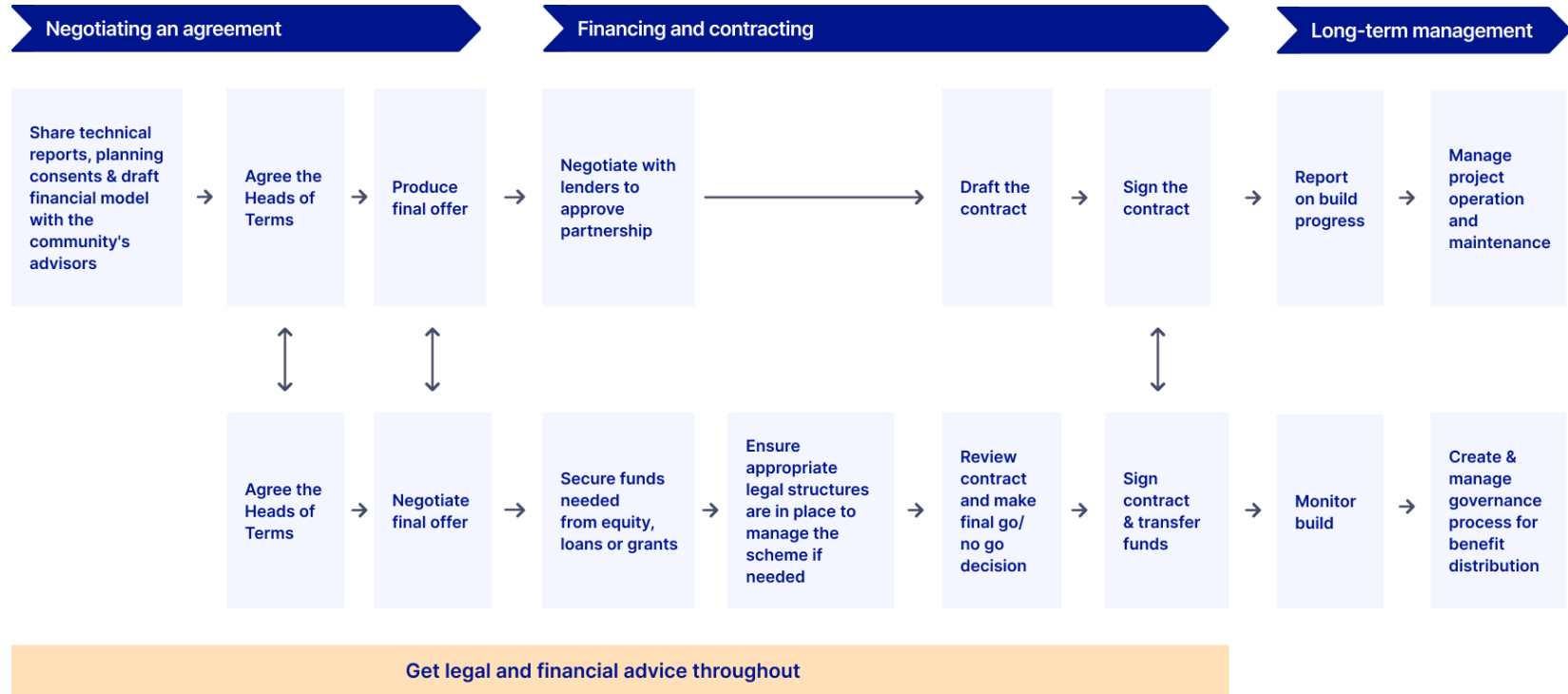
Typical shared ownership journey

Based on our evidence review, we produced a typical shared ownership journey to align our understanding, identify the key phases of activity and test our assumption that creating a more consistent, standardised approach was possible.



Adapted from Local Energy Scotland's Shared Ownership Module and refined through the Matchmaker Discovery phase.³⁵

Typical shared ownership journey (cont.)

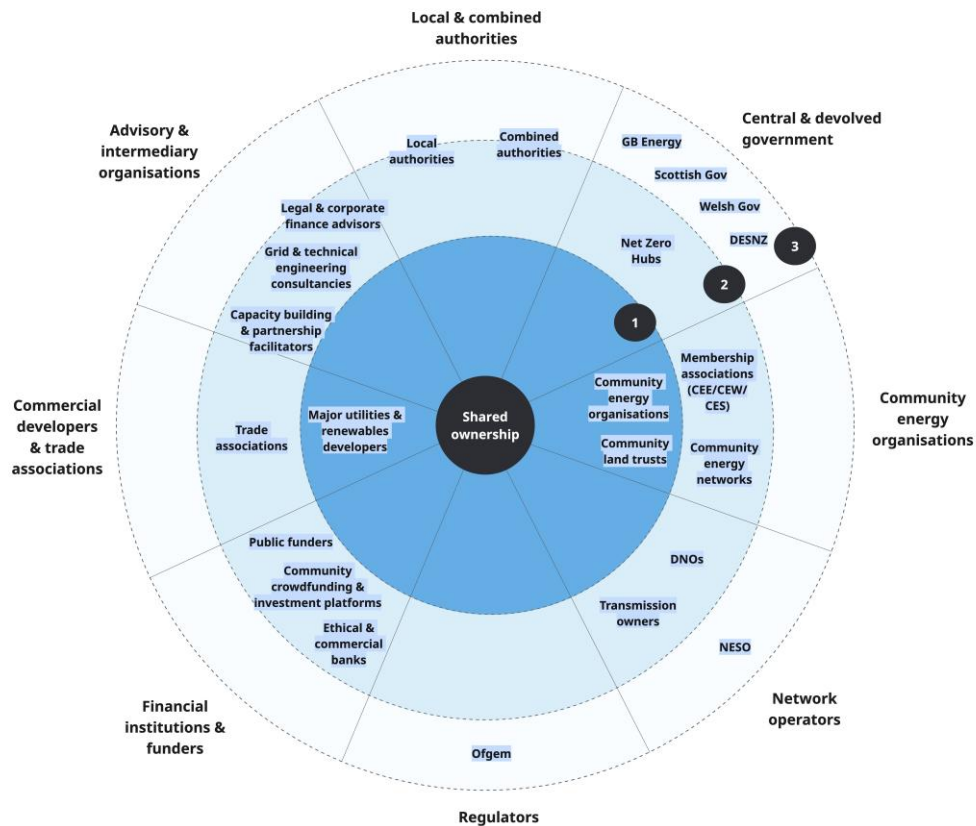


Ecosystem map

To help us understand the shared ownership ecosystem, we created an ecosystem map organised around the key sectors involved, with three concentric rings representing:

1. Core delivery partners
2. System and market enablers
3. Governance organisations

We then identified the types of organisation relevant to each segment, naming key organisations where relevant.



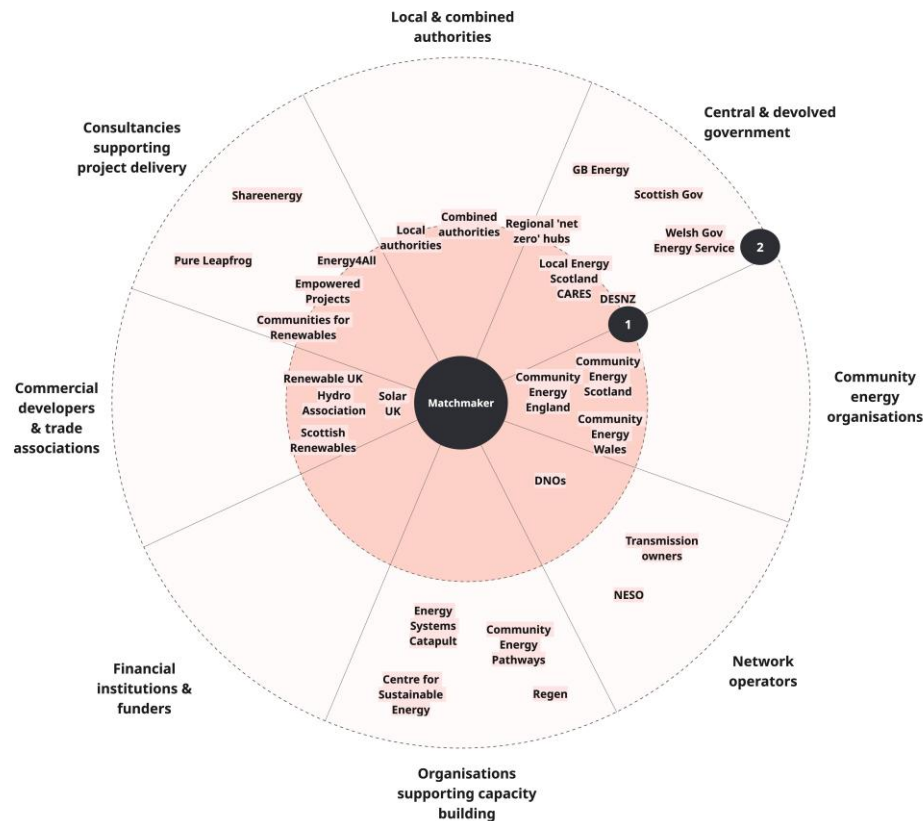
Ecosystem gap analysis

We undertook an ecosystem gap analysis to identify key organisations active in the shared ownership landscape whose activities overlap with elements of the Matchmaker service.

This mapping was continually refined throughout discovery in collaboration with our advisory board. On the ecosystem map, organisations are arranged across two concentric rings representing:

1. Matching
2. Informing and supporting

We view this map as a living baseline and welcome further input from the sector to ensure it is fully representative.



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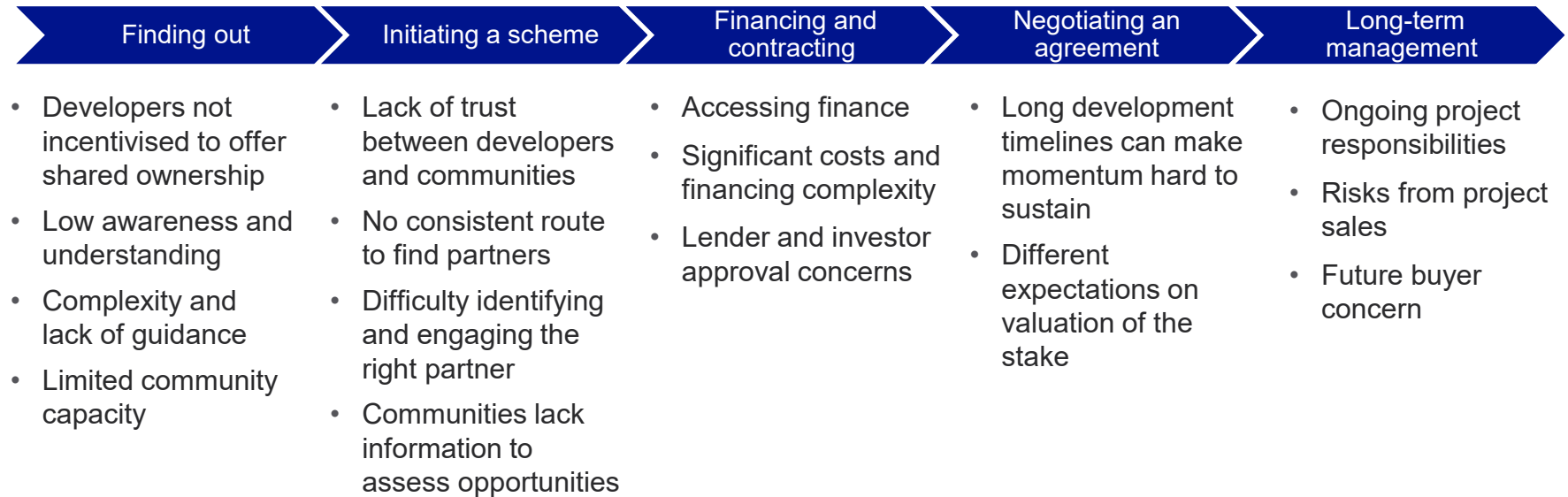
Barriers to shared ownership

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Barriers across the shared ownership journey

This section synthesises the barriers identified during user interviews and the evidence review. They are summarised here and expanded on in the following pages. The literature review of barriers drew primarily on key shared ownership research studies, with the findings tested through user interviews.³⁵⁻³⁸



Developers are not incentivised to offer shared ownership.

Interviewees consistently identified a lack of developer incentives as the main barrier to shared ownership. As participation remains voluntary, delivery is heavily dependent on a relatively small number of willing developers.

“Developers aren’t incentivised at all to offer shared ownership. There is no benefit really to developers to doing that” (Community energy organisation)

Awareness and understanding of shared ownership remain limited.

Many developers and community energy organisations have little experience of shared ownership and may not recognise it as a realistic opportunity. Participants described a lack of familiarity with shared ownership models, their potential benefits and how they could support organisational objectives.

“We haven't been made aware and we haven't sought out any opportunities because we haven't felt that we've needed to.” (Community energy organisation)

Shared ownership is often perceived as complex and difficult to navigate.

Developers and community energy organisations often view shared ownership as a complex and uncertain process. A lack of clear processes, templates and guidance can make it difficult to understand the steps involved, assess different ownership models and navigate legal and commercial requirements. This can reduce confidence that the time and resources invested will lead to a successful outcome. Developers may see shared ownership as adding complexity to project development, while communities can be concerned about organisational capacity and long-term commitments.

*“We were all making that up as we went along. We didn't really know what the next step was from one moment to the next”
(Community energy organisation)*

“It's a very slow, very onerous, very complicated process that in our experience to date does not quite deliver what it's meant to deliver.” (Developer)

Limited community capacity can make it difficult to pursue shared ownership opportunities.

Many community energy organisations face significant resource constraints when pursuing shared ownership opportunities. Limited staff and volunteer capacity, changing leadership and the long timescales associated with renewable energy projects can make it difficult to sustain engagement and progress opportunities.

This was particularly evident amongst smaller organisations, where shared ownership often competes with existing priorities and relies heavily on volunteer time.

*“The problem that we've got really is the capacity to engage with these developers.”
(Community energy organisation)*

*“The leaders within a community can change over time... their lead contact has now left from that community and the momentum from the community has really shifted.”
(Developer)*

Lack of trust between developers and communities.

Community energy organisations are wary of developers' motives and concerned that shared ownership commitments may not materialise. Some developers have concerns about the capability, competence and reliability of community energy organisations, particularly their capacity, commercial readiness and ability to raise finance.

Additional advisory board reflection: Differences in culture, language and operational drivers may create additional challenges in communication, trust and partnership working.

"I was a little bit worried that we didn't have any contract. And we were basically being used to make this development seem more palatable to the community without any assurance that they would actually get anything." (Community energy organisation)

"For a community energy organisation working with a solar developer, there's a big mismatch of skills, capability, resources. That's highlighted as soon as you start doing these projects." (Community energy organisation)

Developers and community energy organisations rely on a patchwork of channels to find one another.

There is no single, consistent route for developers and community energy organisations to find one another. Instead, they rely on a patchwork of channels such as planning portals, local networks and stakeholder contacts, social media and word of mouth, alongside more structured support from a handful of dedicated organisations. This can make the process time-consuming and dependent on existing relationships, particularly for those with less experience of shared ownership.

“At the moment, it's sort of a bit of everything. A bit word of mouth, local stakeholders. Once we launch the project, there will be more people we can talk to – local councillors, community councils, parish councils. We're doing our own research.”
(Developer)

Identifying and engaging the right community partner can be challenging.

Community organisations can vary considerably in their experience, capacity and organisational maturity. In some areas, there may be multiple organisations with an interest in a project, while in others there may be no established organisation ready to pursue shared ownership. Developers may therefore face uncertainty about whom to engage and what support may be needed before a shared ownership opportunity can progress.

“The other problem you've got here is what if you've got competing community groups saying this is our wind farm, we should get this.” (Community support organisation)

“[The Matchmaker service] would be quite helpful, especially in those areas where there is no community group right now.” (Developer)

Communities lack access to information needed to assess opportunities early in project development.

Communities often need detailed information to assess whether a shared ownership opportunity is viable. However, developers may only be able or willing to share limited information during the early stages of project development, particularly where project details are still evolving or commercially sensitive. As a result, communities can find it difficult to assess opportunities and determine whether they are worth pursuing.

“It's not even just about what I'm willing to share, but I wouldn't share information that I'm not confident is correct.” (Developer)

Communities can face significant challenges accessing finance for shared ownership opportunities.

Communities often need substantial funding to acquire a stake in a renewable energy project, but access to affordable finance can be limited. Shared ownership projects may be viewed as higher risk by lenders and investors, while communities can struggle to secure funding on terms that make projects financially viable. Long payback periods and relatively modest returns can further affect the attractiveness of opportunities, particularly where communities need to commit significant capital before returns are realised.

*“A lot of the community shared ownership offers that are finally made are in the £0 to £10 million range. For those communities, trying to find the funding can be very hard.”
(Community energy organisation)*

Establishing shared ownership can involve significant legal and advisory costs.

Establishing shared ownership arrangements often requires legal, financial and technical advice, alongside the development of financial models, governance arrangements and due diligence processes. These costs can be significant for both communities and developers, particularly before any long-term revenue is secured. Developers also highlighted that shared ownership structures can create additional complexity for lenders, investors and internal approval processes, potentially increasing project costs and slowing progress.

“Because the factor in here is how much it costs to do [a shared ownership project], because it's pretty significant. You're in six figures per project” (Community support organisation)

Concerns from lenders and investors can make shared ownership more difficult to deliver.

Lenders and investors can be cautious about shared ownership structures because they introduce additional governance, legal and financing considerations. Developers may therefore need to spend additional time securing approval from lenders, investors and internal decision-makers, creating a barrier to project delivery.

“Most lenders in the UK are just used to normal standard things. This is not so standard that you have this kind of co-investment. And lenders will have issues around security.” (Developer)

Long project development times can make it difficult to maintain momentum and engagement in shared ownership discussions.

Renewable energy projects often take many years to move through planning, consenting and grid connection processes. Over this time, key contacts can leave, organisational priorities can change and community momentum can decline. Long lead times can also create a mismatch between community expectations and when developers are able to make meaningful shared ownership offers, leading to frustration and disengagement.

“If there is a four year gap between getting that planning permission, people move on, people die, all sorts of things happen.”
(Community energy organisation)

“You could be talking like seven years out, seven years to your grid connection.”
(Developer)

Differing expectations about the valuation can make opportunities inaccessible to communities and prevent agreements from being reached.

Communities and developers may have different expectations about what constitutes a fair price for a shared ownership stake. Where developers seek prices that reflect open market value, opportunities may become inaccessible to communities. Without an agreed approach to pricing and valuation, communities and developers can invest significant time and resources in negotiations despite having little prospect of reaching a viable deal.

“The price that the community can afford to pay is way lower than they would get on the open market, so they would never agree that.”(Community support organisation)

Managing shared ownership creates ongoing governance responsibilities for communities.

While community involvement during project operation may be relatively limited in some shared ownership models, communities can still face ongoing responsibilities related to governance, financial management and accountability. This may include managing income from the project, deciding how revenues are used, reporting to members and stakeholders, and, in some models, overseeing their ownership stake. These responsibilities can place additional demands on organisations with limited staff or volunteer capacity.

"Literally I was the only person on the board... and it took forever." (Community energy organisation)

Project sales can create uncertainty over long-term community ownership and benefits.

Renewable energy projects may be sold during their lifetime, creating uncertainty over the future of shared ownership arrangements. While communities may receive the value of their share if a project is sold, a change in ownership could shorten the anticipated income stream and reduce the long-term benefits that shared ownership is intended to provide.

Previous research highlights the importance of considering how community interests are protected if project ownership changes during the project's lifetime.³⁶⁻³⁷

Developers may be concerned that shared ownership could reduce the attractiveness of a project to future buyers.

Shared ownership arrangements can introduce additional legal, governance and commercial considerations that future investors or purchasers may need to accommodate. Developers may therefore be concerned that shared ownership could complicate future project sales or reduce the pool of potential buyers. This can make developers cautious about introducing ownership structures that prospective investors may view as unfamiliar or higher risk.

“When they sell it, they want it to be attractive...” (Developer)

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Insights into the Matchmaker service



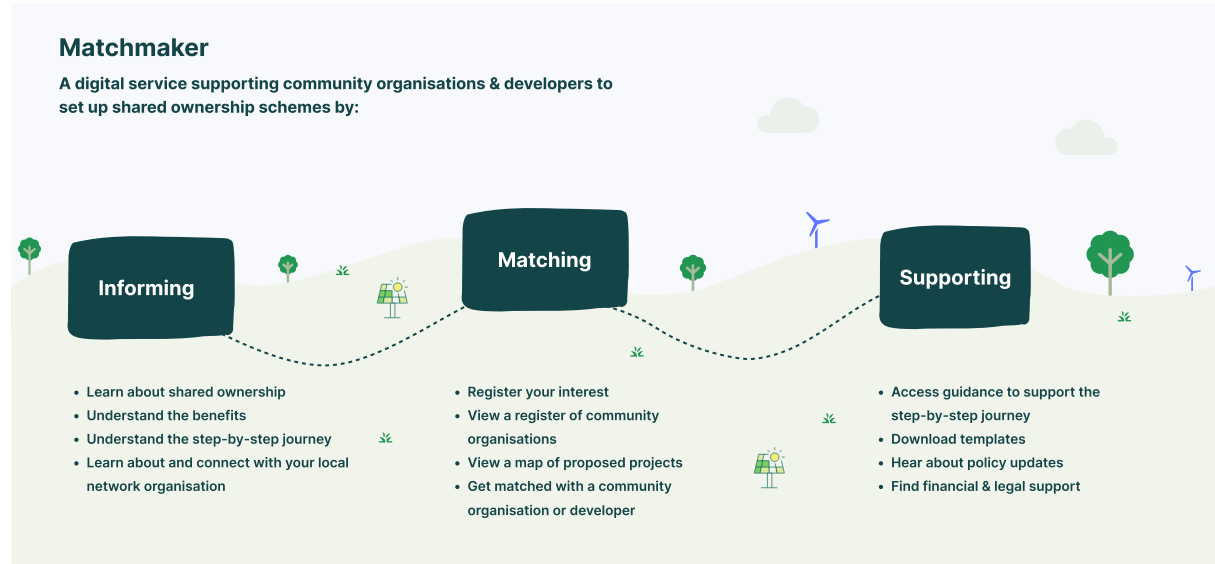
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Validating the service concept

We shared the high-level service concept visual in 19 semi-structured interviews with community energy organisations, developers and community support organisations.

Participants were asked to share their initial impressions, assess the value of the service for them and discuss what they would find most and least useful. They were also asked detailed questions about what they would need from each of the three service pillars, and to share their initial thoughts around a potential service owner.

The following slides detail the key insights gathered, grouped under each pillar.



The value of the service

Developers and community energy organisations saw all three service pillars as valuable at different stages of their journey.

In terms of usefulness, participants ranked the pillars in the following order: matching, supporting, informing.

However, the pillars were understood sequentially, and their usefulness was highly dependent on where the participant was on their current journey.

"They're all important. That's the reality. I can't say that one is more important than another because they're all part of that project chain of making it happen. If you take two of those out, it won't work." (Developer)

Informing

To support developers and community energy organisations at the start of their journey, the service needs to help manage expectations around what is possible.

This can support both parties to understand each other's needs and expectations early in the process, saving time and effort later.

"Having more of a clearer understanding by the communities will help...so that when we're having discussions, there's a little bit less of a gap between what they're expecting and what we're authorised to offer"
(Developer)

"It needs to be two way...there's equally an education job required with developers as there is with communities." (Community energy organisation)

Informing

The service needs to demystify the shared ownership process and create consistency, making it quicker and easier for developers and community energy organisations to navigate.

"It could overcome some of those barriers by demystifying it...making the process easier for all parties and making it more consistent so people know what to expect." (Developer)

"We don't want to be doing a different thing on every project." (Developer)

Informing

Developers and community energy organisations need detailed information that shows the practical realities of projects rather than high-level, theoretical information.

The types of information participants needed included guidance on models of shared ownership, timelines, prerequisites, step-by-step journeys, checklists and case studies of previous projects.

"Often guidance is theoretical and kind of starts falling apart when it hits the reality of individual projects." (Community energy organisation)

"If one step is to negotiate the terms of your sharing, OK great...but are you going to break that step down to advise how we go about doing that and what the various different agreements might look like?" (Community energy organisation)

Matching

'Matching' was seen by developers and community energy organisations as a valuable way to find opportunities they may not have discovered otherwise.

Some community energy organisations found existing channels such as planning portals difficult to navigate and time-consuming within their limited capacity and felt that a simple project directory would make it much easier to connect with developers.

*"If this service was available, we wouldn't have had to do all of the mapping and feasibility studies to such a level"
(Community energy organisation)*

"Having a standardised portal where you could advertise your project when it got to the right stage...would be much easier for us" (Developer)

Matching

The service needs to highlight parties who are interested in shared ownership instead of providing a list of all possible partners and projects.

This would be especially valuable for community energy organisations, who currently spend significant time and energy contacting developers to understand their willingness to offer shared ownership as part of a scheme.

"Where the identification thing might be helpful would be in finding developers who are interested in shared ownership, because I think the lion's share at the moment are not interested." (Community energy organisations)

"You need to have a willing developer and a willing community to do it." (Developer)

Matching

The service needs to make it easier for community energy organisations to identify and connect with the right person or team inside the developer's organisation to discuss shared ownership opportunities, as this is currently challenging and time-consuming.

"So there's one thing about finding them all. There's something else about finding the names of the right people to contact. That is trickier than you think." (Community energy organisation)

Matching

The service needs to reflect the wide diversity of opinion around the best timing for a match.

We identified three key moments in the journey the match could take place: pre-planning, post-consent and pre-construction, with each offering potential advantages and disadvantages for both parties.

"If you come on board later with a commercial developer, there's a lot less room to negotiate with them." (Community energy organisation)

"We would not want to get involved right before planning...we don't want to be a kind of community wash." (Community energy organisation)

Matching

During the matching process, community energy organisations need as much information as possible – from project and offer details to developers' motivations.

This would support them to better understand the space for negotiation, overcome barriers to communication and gauge developers' commitment to a partnership before investing time and energy into discussions.

"It would be helpful to know at the outset what their starting position is on a shared ownership offer." (Community energy organisations)

"What's in it for them? Understanding why someone wants to do it is quite key for me, I think... You want to be confident the developer you are potentially joining up with is in it for the right reasons, and they buy into the community owned approach" (Community energy organisations)

Matching

During the matching process, developers need reassurance around the 'readiness' of community energy organisations to take part in shared ownership.

This might include information about an organisation's structure and governance, previous skills, experience and capacity, access to finance and key priorities.

*"You would want to know that they are a legitimate organisation that has some form of minimum standards of governance."
(Developer)*

*"Do they have directors within that community that have business acumen, that have legal experience, that are able to help the community assess this complex opportunity and determine if it is something they would be wanting to progress?"
(Developer)*

Supporting

The service needs to go beyond signposting to offer more active, hands-on support that helps schemes move forward, as getting a project to completion is typically the hardest part of the process.

This might include supporting negotiation between parties, providing legal and financial advice or transaction management, and could be supported by partnerships with existing organisations who offer these services.

"If it made it easier to negotiate a shared ownership arrangement successfully and see that to fruition, that would be valuable. If it's just putting us in contact with a developer who then ends up disappearing because there's no requirement on them to see the process through to the end, then that wouldn't be valuable." (Community energy organisation)

Supporting

Templates would be valuable as they can be time-consuming to create; however, there is a risk that the service will duplicate templates that already exist elsewhere.

The types of templates participants suggested as valuable included initial agreements, memorandums of understanding, heads of terms, financial models, joint venture terms, profit share terms and risk logs.

"I definitely think templates would be really, really helpful because trying to come up with agreements at different stages from scratch is really difficult." (Community energy organisation)

"I think it really does need to be quite prescriptive...I think that would be where the real value is...if this becomes the best practice way of doing things so we don't have divergence." (Developer)

Supporting

Ideally, the service should provide funding to support the process of setting up a shared ownership scheme, as this can be a barrier for community energy organisations.

This could build on the limited existing funding that exists, widening access through supporting community energy organisations to get legal, financial and commercial advice, or to help cover the time of individuals leading the process.

"Everything we do we have to either do for free or raise the money to do it." (Community energy organisation)

"I would put a pot of money beside it and say you get to a certain level or certain stage with that developer, then the money kicks in and they can buy in expertise." (Community energy organisation)

Supporting

Community energy organisations need a way to connect with others who have been through the shared ownership journey.

This could support peer-to-peer knowledge sharing, but it could also extend to connecting with experts to ask questions along the journey or connecting with developers to help foster collaboration within the sector.

"I would put in group support...a number of us come together on a regular basis and talk about wind turbines and that's really useful because that's sharing intelligence and information." (Community energy organisation)

"It gives you a feeling of being together on these projects. And it also allows people to say what has worked, what hasn't worked." (Community energy organisation)

Building on existing support

To add value within the existing ecosystem, the service needs to be complementary and integrated rather than duplicating existing support or adding complexity.

It also needs to be easy for potential users to find, providing a single source of truth that is aligned with other sources of information across the system.

"It needs to ensure that it is providing additionality to other programmes that are also being developed...and take steps to ensure that it integrates within that sphere and is not adding to a layer of complexity for communities." (Developer)

Service ownership

The service needs to be owned by an organisation that has credibility with both developers and community energy organisations while remaining genuinely impartial.

This would help to build trust and reassure both parties that the service has their best interests at heart.

"It needs to be an impartial body that has trust with both parties." (Developer)

"It needs a home within an organisation that will give community energy companies that sort of reassurance that it's bona fide." (Community energy organisation)

Service ownership

Some saw real value in a national governmental organisation running the service, but stressed the need to account for differences in devolved government policy and funding.

"I think it does need to be a centralised organisation in the UK...as a one stop shop almost." (Developer)

"It would give it a bit more credibility if it was linked somehow to national government...It would give me a bit more confidence it was aligned with the local power plan and government policy." (Community energy organisation)

Service ownership

Community energy organisations felt it would be important for the service to be owned by or delivered in partnership with existing organisations with local knowledge.

Many cited Community Energy England, Scotland and Wales, and Local Energy Scotland as key stakeholders who should be part of any solution, to build on existing trust and best practice while ensuring regional differences were considered.

"Think about how it's going to be integrated with local providers, just because they've got the knowledge." (Community energy organisation)

"You would need partners, you would need endorsement from the community energy organisations – Community Energy England, Scotland and Wales." (Community support organisations)

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Distribution

Vision for the service

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Iterated Matchmaker service

Based on our research, we iterated the high-level service concept visual with refined service features to build on in alpha.

Matchmaker

A digital service supporting community organisations & developers to set up shared ownership schemes by:

Informing

- Learn about what shared ownership is and what to expect from the process
- Understand and access guidance to support the step-by-step journey
- Find case studies of previous projects

Matching

- Register your interest or project
- Find information about projects at different stages in your area
- Get matched with interested parties

Supporting

- Access hands-on support to get a project off the ground
- Get funding for legal, financial and commercial advice
- Download templates
- Connect with others who have been through the process

Policy and service scenarios

Reflecting the evolving policy landscape, we developed three scenarios to explore how different levels of policy support could influence the role, target users and impact of the Matchmaker service.

Scenario 1

**VOLUNTARY MARKET/BUSINESS
AS USUAL**

Low-med increase in schemes

No mandate and weak or no meaningful incentives.

Some advice, development support and finance is available through existing organisations.

GB Energy has been formed to support more shared ownership.



Purpose-driven pioneers

Scenario 2

**VOLUNTARY BUT
INCENTIVISED**

Med-high increase in schemes

Developers have a policy or commercial reason to make a credible shared ownership offer.

Incentives could include CfD scoring, planning recognition, reputational benefits, grid queue prioritisation or other policy levers.



Pragmatic adopters

Scenario 3

**MANDATED (WITH OR WITHOUT
INCENTIVES)**

High increase in schemes

Developers are required to offer shared ownership.

Incentives may sit alongside the requirement.



Compliance-led providers

SCENARIO 1 VOLUNTARY MARKET/BUSINESS AS USUAL

Community needs

- Awareness, understanding and clear expectations
- Support to connect with interested developers
- Access to information to assess opportunities
- Capacity and resources to engage
- Trust in developer commitment
- Access to finance
- Legal and commercial advice
- Support managing long term ownership

Developer needs

- Awareness and understanding
- Mechanism to list projects easily
- Support to identify suitable community partners
- Confidence that communities are credible
- Reduced complexity
- Standardised frameworks

Matchmaker role: minimising friction, reducing complexity and providing active, hands-on support.

SCENARIO 2 VOLUNTARY BUT INCENTIVISED

Community needs

- Understanding of incentives and their implications
- Capacity and capability building to engage with a larger number of opportunities
- Support for individuals or groups new to shared ownership

Developer needs

- Understanding of incentives
- Support to identify suitable community partners where no established group exists
- Support to demonstrate credible offers

Matchmaker role: increasing awareness, standardising the process, building community capacity and supporting developers with reporting.

SCENARIO 3 MANDATORY OFFER, WITH OR WITHOUT INCENTIVES

Community needs

- Understanding of requirements and their implications
- Mechanisms to avoid tokenistic engagement by developers

Developer needs

- Understanding of requirements
- Way to demonstrate compliance

Matchmaker role: supporting policy enforcement.



SCENARIO 2



SCENARIO 1

SCENARIO 1

Business model options

Based on the service ownership insights, we identified four potential business models for sustaining Matchmaker, each with different strengths and trade-offs.

We tested these options with the advisory board. Participants emphasised the importance of building on existing support rather than duplicating it. Regional models were valued for local knowledge and relationships, while national approaches offered consistency and scale. Trust, impartiality and strong sector partnerships were seen as essential across all options.

A sustainable service will require impartial national coordination and standardisation, supported by regional organisations with local expertise and support networks.

Service owner(s)	Possible funders	Opportunities	Risks
Great British Energy	UK government	- Alignment with GBE services - One-stop shop for shared ownership - National consistency	GBE support services are new and unknown. Trust not yet established
Distribution Network Operators	Consumer bills or service users	Alignment with existing community energy and connections support	Difficult to justify investment without clear consumer/network benefits
Community bodies (Community Energy England/Scotland/Wales)	Government, grant, or service users	- Support from stakeholder interviews - Trusted by communities	- Less efficiency from multiple services - May not be seen to be impartial by commercial developers
Regional and devolved support organisations (e.g. Local Energy Scotland, Welsh Government Energy Service, Net Zero Hubs, local authorities)	Government (devolved and UK)	- Support from stakeholder interviews - Regional support that reflects local context	- Less efficiency from multiple services - Confusing for developers if different approaches are taken across the UK

All require partnerships with community support organisations, developer trade bodies and the listed possible service owners

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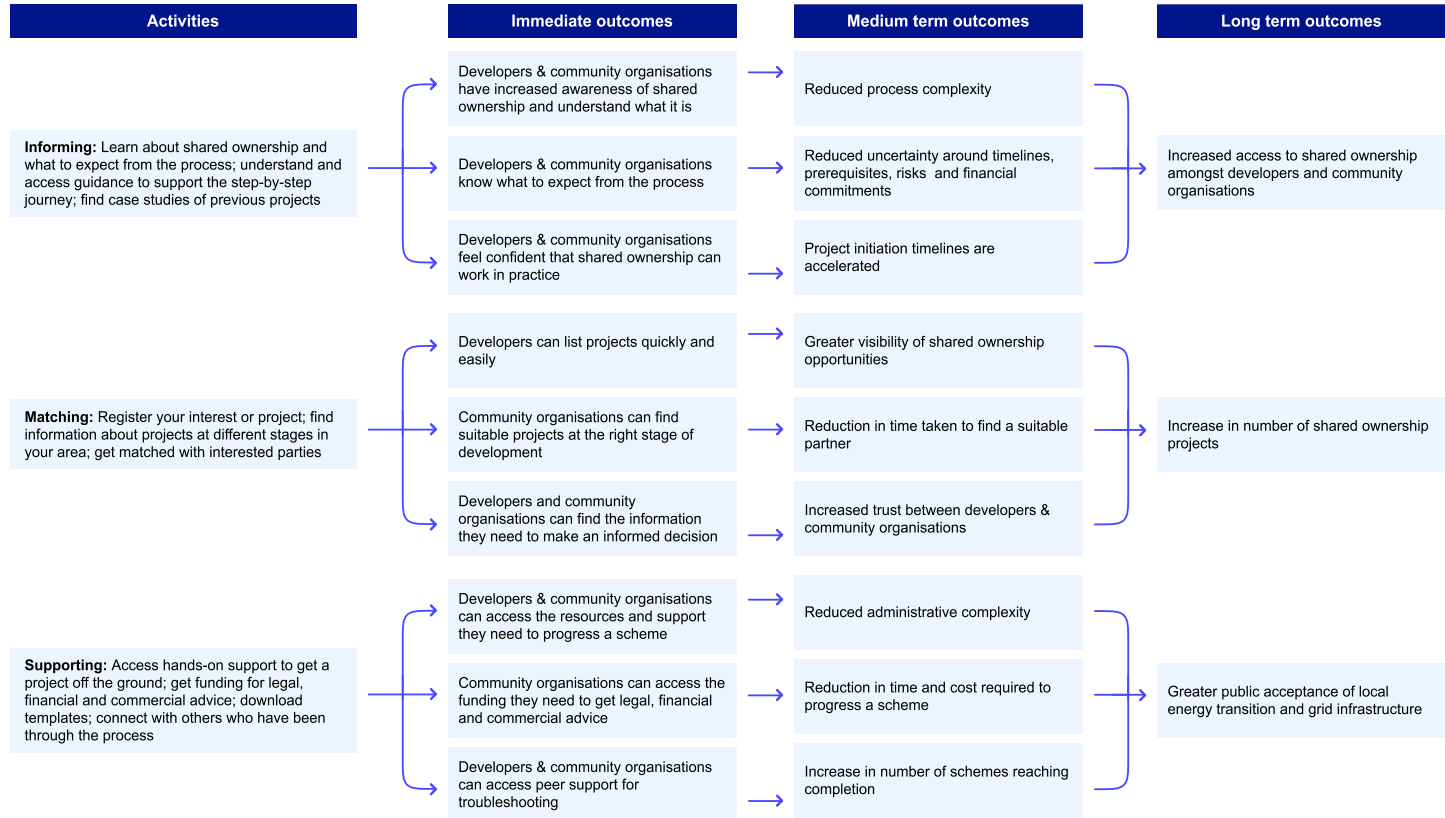
Impact of the service

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Theory of Change

We produced a Theory of Change to demonstrate how the key service pillars and features identified through discovery connect to immediate, medium term and long term outcomes.



Cost benefit analysis

A high-level cost benefit analysis demonstrated a credible case for change and identified substantial potential benefits.

As a SIF project sponsored by National Grid, the analysis considered potential costs and benefits for electricity networks, communities and wider society. The assessment drew on the literature review and stakeholder interviews.

While some early quantitative data is emerging, the assessment remains primarily qualitative. The alpha phase will provide the evidence, baselines and detailed analysis needed to quantify costs, benefits and return on investment.

The **direct benefits** that result from the service creating more shared ownership schemes and increasing public engagement include:

- For the networks: more efficient shared ownership connections; new stakeholder engagement partnership opportunities.
- For society: easier and quicker to create shared ownership partnerships; additional revenue and jobs for the local economy; greater equity in access to community ownership of renewables.

The **indirect benefits** of increased public engagement and acceptance of the net zero transition include:

- For the networks: greater efficiency in reinforcement design and load investment; reduction in losses; higher participation in consumer-led flexibility.
- For society: reduction in carbon emissions; reduction in system costs and, ultimately, energy bills; local multiplier effect from additional local revenue from shared ownership; community investment in fuel poverty support.

The following slides present the potential direct and indirect benefits and costs identified in Discovery.

Direct benefits

Category	Name	Description – primary, intended results of Matchmaker
Direct benefits		
Financial	OPEX – Digital operations impact	If the service matches Distribution Network Operators (DNOs) with communities for engagement opportunities, this could increase efficiency in identifying partners.
	OPEX – Workforce efficiency impact	Standardised guidance for shared ownership connections increases network efficiency, e.g. a day of system planners' time for each project Easier to establish engagement partnerships using trusted intermediaries and reach a greater number of consumers.
Societal	Access – Connection experience impact	Standardised guidance for shared ownership connections improves speed and cost for connecting customers.
	Equity	The service makes shared ownership more accessible to a wider range of communities.
	Growth – Economic growth and jobs	More shared ownership results in more share dividends being paid to local communities. Local Energy Scotland reports average benefit funds of £5k/MW, compared to around £100k/MW for fully community-owned schemes, with shared ownership in between. ³⁵
	Time – Administrative burden	Faster to identify willing partners and the right contacts; easier access to information, templates and guidance; reduced time spent navigating legal, financial and delivery processes through more standardised support.

Direct costs

Category	Name	Description – primary, intended results of Matchmaker
Direct costs		
Financial	Development	Cost of research, building, testing and refining the service.
	Maintenance	Cost of maintaining and updating the service, plus providing hand-holding support.
	OPEX – Digital operations impact	Additional work created for network-led stakeholder engagement activities.
	Societal investment	An increase in shared ownership schemes means more investment by communities, plus, an increase in need for government support/grants.

Indirect benefits

Category	Name	Description – secondary outcomes from increased public engagement
Indirect benefits		
Financial	CAPEX – Reinforcement design efficiency	Greater efficiency from larger projects being built; a delay to reinforcement from greater participation in flex; shorter distances required to transmit power due to generation being built closer to demand.
	CAPEX – Load investment impact	Connecting customers more likely to reach delivery milestones allowing investment to go ahead as planned; the ability to deploy lower-cost network solutions, such as overhead lines and more direct cable routes.
	OPEX – Flexibility procurement impact	Improved public awareness of electricity network operation can lead to higher participation in demand flexibility services.
Societal	Equity – Vulnerability and fuel poverty impact	Community energy organisations invest in fuel poverty support services, with knock-on health and wellbeing benefits. ³⁹
	Growth – Economic growth and jobs	The local multiplier effect kicks in due to a higher proportion of revenue being spent at locally-owned businesses rather than national chains. ³⁹
	Bills – Energy bill impact	Lower system costs from generation being built closer to demand; greater efficiency from larger projects being built; earlier delivery of a clean power system, reducing consumer exposure to global fossil fuel market volatility and energy shocks; greater participation in flexibility which reduces bills.

Indirect benefits (cont.) and indirect costs

Category	Name	Description – secondary outcomes from increased public engagement
Indirect benefits		
Environ-mental	Carbon – Value Chain Emissions Impact	Increased renewable generation from larger projects; earlier delivery of a clean power system; greater participation in flexibility, which reduces the need for peaking plant.
	Losses – Energy losses impact	Shorter distances required to transmit power due to generation being built closer to demand
Indirect costs		
Societal	Time – Administrative burden	An increase in shared ownership means more time spent on developing and supporting schemes

Connections pipeline modelling approach

Building on National Grid Electricity Distribution's future scenarios for community energy, we developed evidence-informed estimates of how much shared ownership capacity could come forward under different policy and service scenarios.⁴³

The model:

- Combined existing projects and the pipeline of developer-led projects that include a shared ownership element with future renewable deployment projections.
- Applied three shared ownership policy scenarios
- Compared these against equivalent Matchmaker scenarios to estimate

The model estimates megawatts (MW) under shared ownership rather than the number of individual shared ownership schemes. Results reflect forecasted community uptake and do not assume every eligible project or community progresses.

Shared ownership scenario assumptions

Three policy scenarios were modelled to explore how shared ownership may evolve under different levels of policy intervention.

[See next page for assumptions.](#)

Matchmaker scenario

Equivalent Matchmaker scenarios were then modelled. These retain the same ownership stake assumptions but increase uptake to reflect Matchmaker's role in improving visibility of opportunities, reducing coordination barriers and helping projects progress.

Shared ownership scenario assumptions

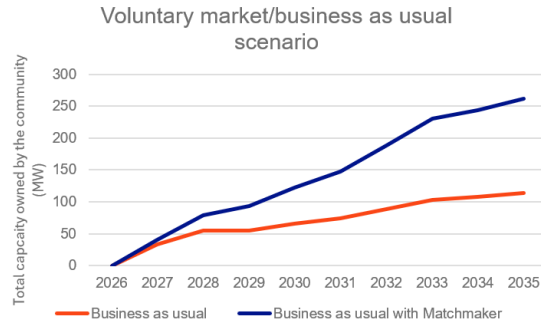
Category	Policy assumption	Average community stake (%)	Estimated shared ownership uptake*
Voluntary market/ Business as usual	No significant new incentives or requirements. Shared ownership continues at current levels.	15% Current average in National Grid's licence area	Remains low, reflecting current levels of developer participation and community uptake
Voluntary but incentivised	Developers are encouraged to offer shared ownership through policy or commercial incentives	10% This average could vary depending on the design of the incentive	Uptake increases as more developers participate, reaching around 30% of projects by 2031
Mandated (with or without incentives)	Developers are required to offer communities at least a 5% stake in renewable projects over 5 MW	7% Assumes most developers offer the required 5% stake, with some offering higher levels of shared ownership	Uptake increases over time, reaching around 70% of projects by 2035. Uptake remains below 100% as not all communities will wish or be able to take up a shared ownership offer. The gradual increase reflects the time required for new policy interventions to influence projects moving through development

*Percentage of projects assumed to include shared ownership over time.

Note: The model estimates MW under shared ownership rather than the number of individual shared ownership schemes. Similar capacity outcomes may therefore represent different numbers of projects and different levels of demand for Matchmaker support.

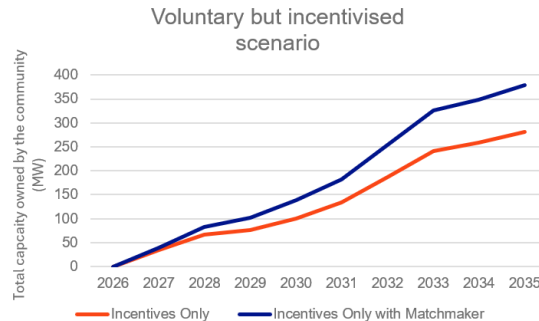
Shared ownership outcomes across scenarios

Policy intervention is a key driver of future uptake, with both incentive and mandatory approaches increasing shared ownership compared with business as usual. Matchmaker increases projected shared ownership capacity under all scenarios.



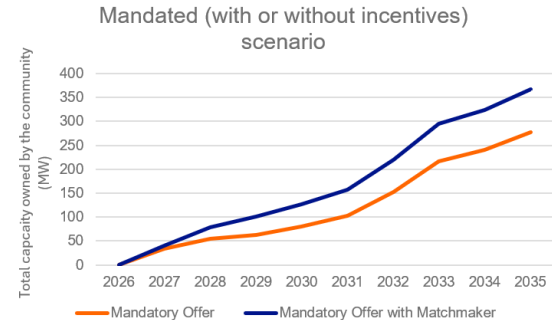
Limited growth

Without additional policy intervention, shared ownership increases gradually. However, Matchmaker significantly increases projected shared ownership capacity under this scenario.



Fewer projects, larger stakes

Well-designed incentives could deliver a similar level of community-owned capacity to mandating by 2035, potentially through fewer projects offering larger average stakes.



More projects, smaller stakes

Mandatory offers could increase the number of shared ownership opportunities, although average ownership stakes may be lower. Demand for Matchmaker support could be greatest under this scenario.

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Conclusions and next steps

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Conclusions

A gap in the market

Through our ecosystem gap analysis, we identified a number of organisations supporting the development of shared ownership in ways that overlap with the Matchmaker proposition. However, barriers persist, and existing support is often delivered through manual advisory services reliant on informal networks and static data directories, limiting its ability to scale. There is a gap in the market around a digital 'front door' that can support the end-to-end process at scale. Through this discovery, we have validated the need for this amongst developers and community energy organisations.

A digital service...

Despite the commonly held belief amongst sector stakeholders that every shared ownership scheme follows a bespoke process, we found a strong appetite amongst developers for the more standardised, consistent approach that a digital service can provide. We believe that this approach can enable greater awareness of shared ownership, increased uptake within the market and more efficiency within the process.

...with non-digital components

Although primarily a digital service, our research identified the need for non-digital components, such as bespoke advisory and transaction management support that enables shared ownership schemes to progress to completion. These activities could be well served through partnerships with organisations operating in this space, ensuring the digital service is joined-up, complementary and well-integrated with existing sources of support.

Conclusions (cont.)

The impact of the service

By mapping our insights against three different scenarios, we have evidenced that the service can play a valuable role now, even without wider changes to policy or incentives. As the wider policy landscape changes, the service can evolve to enable a significant scaling of shared ownership within the market. The potential value of Matchmaker also extends beyond increasing the number of shared ownership schemes. By reducing barriers, widening participation and supporting more consistent delivery, the service could unlock benefits for communities, developers, networks and society.

Service ownership

Our research identified the need for impartial national coordination and standardisation, which could be well served through ownership by a national governmental organisation. However, this needs to be supported by regional organisations with local expertise and established support networks. Any future service owner also needs to be viewed as independent and trustworthy by both developers and community energy organisations for the service to succeed.

Does it solve the challenge?

Many of the principles underpinning shared ownership, including trust, fairness, participation and local benefit, align closely with factors associated with public acceptance of infrastructure. While direct evidence linking shared ownership to grid infrastructure remains limited, the findings suggest that shared ownership could play a role in supporting public acceptance and warrants further testing through the alpha and beta phases.

High-level plan for alpha

Following these conclusions, we plan to apply for alpha funding to progress the Matchmaker service. The aim of the alpha phase would be to design the end-to-end service based on our iterated service concept, prototype key components and test them with a wider group of users to continue to validate the solution and work towards the beta pilot phase.

Key research questions we will continue to explore in alpha

- Would an increase in the number of shared ownership schemes lead to increased public support to grid infrastructure?
- How realistic are our projections around a low-medium increase in shared ownership schemes if the service was developed within the current policy environment (scenario 1)?
- Which components of the service should be standardised at a national level, and which should be delivered via local, personalised support? How should this be reflected in service ownership and through partnerships with existing organisations?
- What role should the DNOs play in the service, and how can it benefit them?

High-level plan for alpha (cont.)

Risky assumptions to validate in alpha

That one or more existing organisations within the sector would be prepared to fund and deliver the service.

That developers and community energy organisations would proactively register for the service if shared ownership remains voluntary (scenarios 1 and 2).

That the service is able to 'match' developers and community energy organisations in a way that is consistent with FCA regulations around the communication of investment opportunities.

Design questions to explore in alpha

How might we widen access to individuals or community organisations who haven't engaged with shared ownership before?

How might we best facilitate the 'matching' of developers and community energy organisations?

How might we facilitate information sharing in a way that builds mutual trust while respecting commercial constraints?

How might we offer funding to support community organisations to set up shared ownership schemes?

How might we support community organisations to connect with others who have been through the journey?

How might we rename the service to better reflect the breadth of what it offers?

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