Belgium Energy & Utilities Outlook 2026

12 drivers of change shaping the sector

Belgium's energy and utilities sector is entering a period of profound transformation. Decarbonisation, electrification, digitalisation and geopolitical uncertainty are reshaping the industry at an unprecedented pace, requiring utilities, network operators and energy-intensive industries to rethink how energy systems are planned, operated and secured.

The report identifies **12 drivers of change** that will shape the sector's ability to remain secure, affordable, resilient and sustainable and explores the strategic implications for organisations seeking to thrive in a rapidly evolving market

Twelve drivers of change

Twelve interlinked drivers will transform the sector over the next decade.

Electricity grids will need major expansion and electricity itself will take on a growing role in the overall energy mix. Data centres and digital infrastructure will drive demand sharply higher, while energy storage and the integration of renewables become central technical challenges. Security of supply and energy affordability will remain key concerns, against a backdrop of ageing infrastructure that needs modernising. Gas networks will evolve into multi-energy systems, while grid access, permitting frameworks, and European energy corridors will shape where and how investment flows. Finally, the availability of a skilled workforce will determine the sector's ability to carry out all of these changes.

Rapid growth in electricity demand

The most immediate challenge is the rapid growth in electricity demand. Electrification of transport, buildings and industry, combined with the expansion of artificial intelligence and data centres, is placing unprecedented pressure on Belgium's electricity networks.

At the same time, renewable generation continues to increase, requiring greater flexibility to balance intermittent supply while maintaining grid stability. Expanding transmission and distribution infrastructure therefore becomes essential, but so too does making better use of existing assets through smarter planning, more efficient use of available capacity and advanced digital technologies.

Digitalisation

Digitalisation emerges as the common thread across all twelve drivers. Artificial intelligence, advanced analytics, digital twins, predictive maintenance, energy management platforms and distributed energy resource management systems will enable operators to optimise networks, forecast demand and renewable generation more accurately, orchestrate distributed flexibility, improve asset performance and strengthen operational resilience.

These capabilities will be instrumental in transforming electricity grids, integrating storage technologies, supporting hydrogen infrastructure and improving the efficiency of both utilities and industrial consumers.

Resilience

The report also highlights the growing importance of resilience. Recent geopolitical developments have reinforced the need to strengthen security of supply through diversified energy sources, enhanced cross-border interconnections and greater domestic control over critical infrastructure.

Meanwhile, the digitalisation of operational technology has significantly expanded the cyber threat landscape, making cybersecurity, real-time monitoring and AI-driven threat detection fundamental requirements for maintaining reliable energy systems. Ensuring affordability remains equally important, as rising investment requirements must be balanced against the need to preserve industrial competitiveness and maintain public support for the transition.

Strategic position

Belgium's strategic position within Europe provides significant opportunities. The development of hydrogen corridors, carbon transport infrastructure, offshore energy hubs and stronger electricity interconnections positions the country as a potential gateway for Europe's future low-carbon energy system.

However, capturing this opportunity will require greater coordination between electricity, gas, hydrogen and CO_2 networks, supported by interoperable digital platforms and harmonised market mechanisms.

Shortage of skilled workers

Finally, the report recognises that the transition is not only a technological challenge but also a human one. Maintaining ageing infrastructure while addressing growing shortages of engineers, technicians and digital specialists will require substantial investment in workforce development alongside increased automation and new digital capabilities.

Organisations that successfully combine infrastructure investment with digital innovation, operational flexibility, cyber resilience and talent development will be best positioned to navigate the increasing complexity of Belgium's energy transition and create long-term value.

Download the report

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