

Hunter & Central Coast Regions Transmission Infrastructure Capability Analysis 2026

Introduction

In regions such as the Hunter and Central Coast, energy systems are expanding and shifting toward renewable sources, presenting new opportunities for businesses and communities.

This shift is also providing manufacturers in the region with real potential to participate further in Australia's transmission supply chain.

NZEA engaged the Industry Capability Network (ICN) to provide research into the capability of the Hunter and Central Coast regions, and the opportunities to maximise business participation in the development of transmission in the Regional Energy Zones.

The research focused on three broad categories:

- ◆ Planning and site preparation for transmission projects
- ◆ Manufacturing, installation and ongoing maintenance of transmission towers
- ◆ Manufacturing, installation and ongoing maintenance of electrical balance of plant, including cabling, wiring, substations and transformers.

Key findings

1. There are currently several areas of strength for the Hunter and Central Coast regions: from planning and site preparation to switchboard and distribution board manufacturing, transmission tower foundations, and onshore electrical services.
2. The regions have deep, transferable capability in heavy fabrication, precision machining, and industrial metal processing. Specialised electrical product manufacturing remains narrow and concentrated.
3. There is a clear and genuine interest among manufacturers to pivot or expand into transmission supply chains, provided the opportunity is credible.
4. Increasing participation requires shaping conditions so capable companies can commit. Industry feedback suggests firms respond most strongly to clarity, predictability, and credible routes to market.

Strengths

- ◆ The Hunter and Central Coast regions are strongest in planning and site preparation. Particularly across civil services such as civil works, machinery and equipment hire, concreting, and road construction, as well as engineering and design services.
- ◆ Current manufacturing capability was strongest in switchboards, distribution boards and precast concrete.
- ◆ Businesses in these regions are also well represented in onshore electrical services (HV and LV), crane hire businesses, and transmission tower foundations.
- ◆ Suppliers were most capable in aggregate and road base, earthing system components, SCADA and control systems, and concrete supply.

Gaps

- ◆ The largest gaps were in the offshore packages. This is somewhat expected, given offshore wind is a newer industry in Australia.
- ◆ For transmission towers, the absence of domestic prototype structural testing and large-scale galvanising capability presents a constraint.
- ◆ Companies with capability relevant to transmission tower fabrication may not have the scale, throughput or production speed required to supply new build transmission projects at the rate needed by major project schedules. Definitive opportunities, lead times, and a confirmed pipeline of work would give the relevant businesses justification to make an investment to scale their operations.

Industry engagement Insights:

- ◆ ICN developed an industry survey with NZEA to capture insights into barriers to entry and how contract opportunities could be maximised for their business.

Barriers to entry

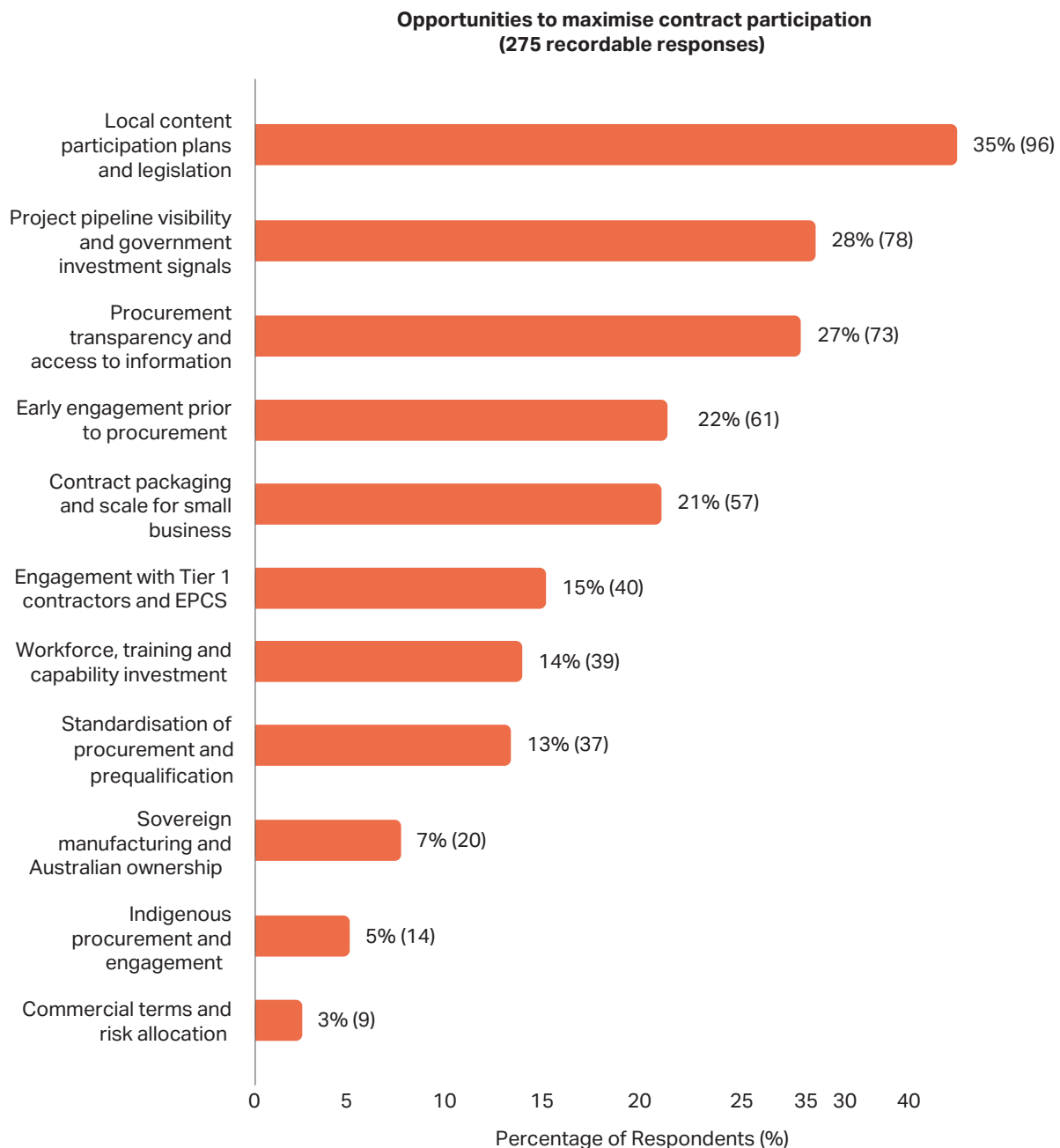
- ◆ On the survey question about barriers to entry, 62.7% of survey respondents cited a lack of project pipeline visibility as a barrier, while 46.5% cited a lack of consultation or engagement with developers.

BARRIERS BY REGION (COUNTS)

Group	n	Visibility	Consultation	Tender	Procurement	Package Size	Mobilisation	Finance	Workplace	Other	Answered
All Respondents	318	151	112	95	89	40	24	11	12	19	241
Hunter	132	57	48	42	34	21	8	6	6	4	99
Central Coast	19	10	6	5	8	2	0	1	0	0	15
NSW (Non-H&CC)	106	50	34	27	29	11	6	3	5	10	75
National	61	34	24	21	18	6	10	1	1	5	52

Maximising opportunities for participation

- Survey respondents were asked how contract opportunities could be maximised for their business. Of the 286 who answered, 275 provided usable feedback. These were disseminated into 9 themes, presented below in descending order of frequency.
- The themes are consistent with both the barriers identified in the survey and the feedback from stakeholder consultations, reinforcing the idea that information, access, and procurement design are primary levers for increasing local participation.



- ◆ Significant shortages were also identified in electrical trades and logistics, with no centralised, data-driven approach to forecasting labour demand.
- ◆ The importance of understanding project pipelines at a national level, and undertaking proper workforce modelling to assess demand in each region relative to the expected works, was also raised.
- ◆ Concerns were also raised that the Central Coast risks being subsumed under the broader Hunter transition framework. The region could lose its distinct identity and miss targeted transition support.
- ◆ Though not featured in the reports, additional feedback identified opportunities for local businesses to manufacture supports, stands, bases, brackets and gantries for OEM electrical equipment and machinery.

Transferrable capability

- ◆ The transferable capability assessment tested where existing regional strengths could realistically support future transmission demand.
- ◆ ICN considered what the supply chain needs, what the Hunter and Central Coast are already good at, where the gaps are, and whether there is a credible commercial opportunity for local businesses to enter or expand.
- ◆ The assessment focused on component groups with the greatest alignment to regional capability, including lattice towers, line hardware and conductor fittings, busbars, anchor cages, and switch room enclosures.
- ◆ Of these, towers, line hardware, and busbars presented the strongest commercial case. The manufacturing requirements for each align closely with what Hunter and Central Coast businesses already do.
- ◆ From the final list of in-scope transmission components, potential manufacturers in the Hunter and Central Coast were identified.
- ◆ ICN reached out to a total of 171 companies across four transmission component areas to explore feasibility, required adjustments, and barriers to entry among shortlisted businesses.
- ◆ Industry responses indicate most interested businesses are close to ready. Across 63 responses, feasibility outcomes were strongly skewed toward near-term participation:

37

Responses indicated feasibility with minor adjustments

18

Responses indicated feasibility with moderate investment

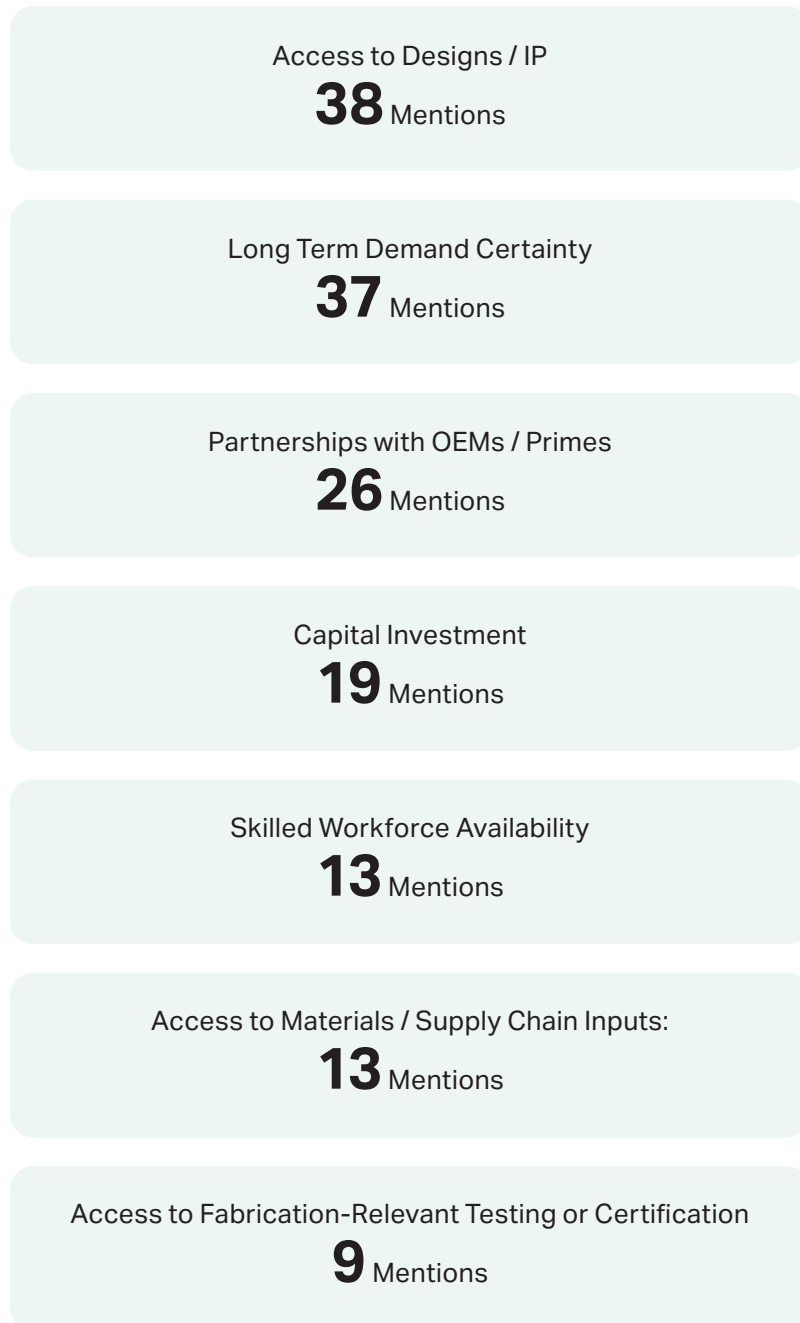
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Response required major investment

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Response was not feasible under current operations

- ◆ However, responses from these businesses provide strong signals that access to information is a prerequisite for further feasibility assessment. Without drawings, specifications, and expectations, companies cannot accurately assess technical feasibility, estimate process changes or develop credible costings.
- ◆ Across all responses, the most frequently cited barriers and enablers were:



About the research

The research was delivered by ICN to examine whether existing manufacturing capability in the Hunter and Central Coast regions could be redirected toward transmission infrastructure componentry. The research draws on:

- ◆ ICN's national database, as well as online sources such as websites and capability statements, and industry knowledge.
- ◆ Survey engagement with businesses.

The project did not seek to map every business that could contribute to the broader energy transition or the full transmission sector. ICN mapped businesses against 68 defined work packages that project owners and EPC contractors would reasonably procure from the market.

As a result, the dataset should not be read as a complete measure of the Hunter and Central Coast's industrial base. The Hunter has significant manufacturing, heavy fabrication, machining and metal processing capability that may not be fully captured where businesses do not currently align to a specific transmission work package. This broader industrial capability was considered in the transferable capability assessment.

This research is a point-in-time analysis. It reflects capability and interest as reported by businesses at the time of engagement. It does not constitute a guarantee of supply or an assessment of commercial viability. The findings are intended to inform procurement design and policy, not to pre-qualify suppliers.

NZEA supports evidence-based conversations that help regions navigate change and realise long-term opportunities.

Further information

If you are interested in finding out more about this research and other NZEA reports, visit the [Net Zero Economy Authority website](#).

