The Home Front: A strategic security review of British homes

EXECUTIVE SUMMARY

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As demonstrated by the Russian invasion of Ukraine and ongoing war in the Middle East, geopolitics and its consequent energy shocks have inflicted a severe economic and social toll on the UK and its citizens. During a time when the nature of multilateralism is shifting, the UK must rethink what security means and how it can be resilient in the face of the turbulence and complexity of contemporary threats and challenges. This report shows how risks emerge and compound in one area crucial to UK security: its housing stock. Gas dependency of UK homes represents an Achilles heel to national security, and government must act urgently to shore up the home front to mitigate this structural and systemic threat.

Download our full report, *The Home Front: A strategic security review of British homes*, published June 2026, from **https://www.e3g.org/publications/uk-homes-gas-dependence-security-threat/**

The UK's "home front" – and its ability to support and function for the civilian population – is a central pillar of national resilience. However, the UK housing stock's dependence on gas is a significant vulnerability, posing **a severe and growing national security threat**, based on our assessment of the three compound risks:

1. **Threat to home front readiness:** 85% of British homes are heated using gas, almost half of which must be imported through just four infrastructure clusters.[1] The ability of aggressor states to target domestic infrastructure is a structural and crucial vulnerability, as is the risk of supply chain weaponisation and disruption as has been exposed in the Strait of Hormuz this year.
2. **Threat to economic and financial stability:** The UK's reliance on gas and exposure to recurring energy crises damages the UK economy and weakens public and household finances.

[1] Energy UK, **Fuelling the future: Prioritising the gas transition for Net Zero**, accessed 20/05/2026

3. **Threat to political legitimacy and social security:** Pressure on public finances makes it harder for the state to take the action required to mitigate the impacts arising from the UK's gas dependence, leading to a broader feeling that society cannot be protected. This risks democratic and political legitimacy itself, which is amplified by disinformation over clean energy.

Decisive action on the electrification of British housing is an investment in long-term durability and security of the state and its people, while delaying such action puts the UK at great risk. It is not geologically possible for the UK to secure short- or long-term energy security though its 85–93% depleted North Sea oil or gas reserves, while compounding climate effects risk further deterioration of security.[2]

Strengthening the resilience of British homes improves deterrence, restores public confidence and reduces the UK's exposure to attack. The government can either act to urgently shore up the home front or keep courting catastrophe.

Top recommendations for government to consider

1. Launch a **national "Home Front Mission"** to accelerate electrification of UK homes and establish a plan to phase out oil and gas for home heating.
2. Prioritise a more strategically **decentralised**, more secure energy system at pace.
3. Prioritise **diversification of supply chains** for clean energy technologies and develop incentives to maximise **UK manufacturing**.
4. Identify gas dependence as a **security threat** and classify it as a "**chronic risk**" in the National Risk Register.
5. Government and Joint Intelligence Committee to launch a **joint inquiry** into action by hostile states, malign actors and special interest lobbyists to spread **disinformation** regarding clean energy.

[2] Uplift, **The Declining Economics of the North Sea**, November 2025; ECIU, **Around 90% of UK North Sea oil and gas 'already drained dry' – analysis**, March 2026

I. Threat to home front readiness

Home front readiness, resilience, and preparedness are vital deterrents to aggression and are fundamental commitments to NATO.[3] However, the UK's gas-dependent housing stock undermines its ability to present a credible deterrence. 85% of UK homes are reliant on four highly centralised gas infrastructure sites, where major pipelines meet their associated refining, processing and distribution centres, for continuous, high-volume supply of gas as a heating source:

1. St Fergus Gas Terminal on the northeast coast of Scotland (25–50% of UK gas supply)
2. Bacton hydrocarbon gas processing plant near Great Yarmouth (up to 33% of UK gas supply)
3. Isle of Grain LNG Terminal in Kent (up to 25% of UK gas supply)
4. South Hook & Dragon LNG Terminal near Milford Haven (up to 20% of gas supply).

Clustered gas infrastructure positions present serious defence challenges and are not rapidly repairable in the event of attack. The pipelines are actively being scoped by highly capable undersea warfare and seabed sabotage divisions.[4]

In contrast, the UK's existing and expanding electricity network consists of over 1.7 million renewable generation sites.[5] These renewable generators require no wider system of international fuel imports to operate. To supply electricity when renewable generation is not sufficient, the UK has 33 combined cycle gas power stations,19 open cycle gas power stations, 10 interconnectors[6] and an increasing number of storage assets[7]. This system is expanding and getting more decentralised each year. The system is using less gas each year and with new energy technologies such as hydrogen storage and batteries there is the potential to remove the dependency entirely.

The UK's reliance on gas for home heating also exposes it to supply chain weaponisation and disruption. These threats become more acute and potentially lethal if adversaries were to "weaponise winter" through assault on civilian infrastructure.[8] The Russian invasion of Ukraine and the war in Iran have exposed the catastrophic consequences to the UK of relying on centralised fossil fuels for energy security. The UK's own North Sea oil and gas

[3] NATO, **Resilience, civil preparedness and Article 3**, November 2024
[4] RUSI, **Stalking the Seabed: How Russia Targets Critical Undersea Infrastructure**, May 2023
[5] Department for Energy Security and Net Zero, **Regional renewable electricity in 2024**, September 2025
[6] Department for Energy Security and Net Zero, **Next steps for electricity interconnection in Great Britain**, March 2026
[7] Analysis from **Digest of UK Energy Statistics** table 5.11
[8] Reuters, **Ukraine is showing why electrification is key to Europe's energy security**, February 2026

reserves are also around 85–93%[9] depleted and the country will be importing more than two-thirds of its gas by 2030, however many new licenses are issued.[10]

Core threats identified are:

Threat	Likelihood (low–high)	Impact (low-high)	Resilience / recoverability (low–high)	Threat level (low–critical)
1a – Gas supply chain disruption and weaponisation	High	Medium	Low	Severe
1b – Critical infrastructure attacks	Medium	High	Low	Critical
1c – Catastrophic events (non-attack)	Low	High	Low	Severe
Overall judgement				Severe

The solution is to accelerate energy system decentralisation through strategic deployment of renewables, which have proven to be more resilient and repairable in conflict and sabotage scenarios.[11] Since Russia's full-scale invasion of Ukraine in 2022, the Russian military has systematically targeted energy infrastructure supplying civilians' basic needs – particularly for heating - prompting a rapid shift by Ukraine to build more decentralised renewables.[12] The UK must also reduce gas demand to mitigate its overdependence and electrify heat to support this more defendable energy system. Homes themselves must also be made more resilient to shock and catastrophic events by deploying at a faster pace technologies like solar panels and batteries, which when combined can reduce electricity consumption by more than half.[13] Homes themselves can thereby become nodes of resilience in a wider security architecture.

[9] ECIU, **Around 90% of UK North Sea oil and gas 'already drained dry' – analysis**, March 2026

[10] Renewable UK, **Can North Sea oil and gas really power Britain's future?**, September 2025

[11] University of Oxford, **Enabling and Ensuring a Net-Zero Aligned Carbon Market for Ukraine**, November 2025

[12] FCDO, **Russia's systematic attacks against Ukraine's civilian energy infrastructure: Joint statement to OSCE Ministerial Council 2025**, December 2025

[13] Green Match, **Average Monthly Electricity Bill With Solar Panels UK (Guide 2026)**, October 2025

Key recommendations

Home Front Mission

Number 10 to launch a national "Home Front Mission" to accelerate electrification of UK homes and establish a plan to phase out oil and gas for home heating.

Decentralise and defend

The Department for Energy Security and Net Zero, in collaboration with NESO, to prioritise delivery of a more strategically decentralised energy system at pace. Also, in collaboration with the Ministry of Defence, to mandate inclusion of dual-use equipment for offshore energy assets.[14]

Spitfire technologies

The Department for Energy Security and Net Zero to accelerate the deployment of "spitfire technologies" such as heat pumps, solar PV, batteries, and energy efficiency measures, boosting UK production of all these technologies and diversifying supply chains.

II. Threat to economic and financial stability

The UK economy is highly exposed to the volatility of international gas markets, with gas setting the price of electricity 60%–85% of the time.[15] Price shocks impact individual households directly via increased energy bills; the war in Ukraine has already cost the average household £2,200 due to higher energy bills.[16] The ongoing conflict in the Middle East has led to Ofgem raising the energy price cap in the summer of 2026 by 13% – pushing energy bills up by an average of £221a year.[17]

Households and small businesses are further impacted by inflation and interest rate rises that multiply the severity of energy shocks and continue to cause economic damage even after energy prices fall. By November 2025, Russia's war in Ukraine and resultant energy crisis had cost the government £183 billion, detracting from other key areas of spending such as healthcare and defence.[18] Inflation coupled with suppressed demand harms growth and public finances, while the accumulation of unsecured debt combines with these factors to threaten stability of the financial system. Further risks to both financial systems and households propagate through mortgage and insurance markets.

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[14] E3G, **Empowering Europe: Delivering the security and economic benefits of North Seas wind**, January 2026

[15] Gov.uk, **Decisive action to break influence of gas on electricity prices**, April 2026; ECIU, **Marginal Gains. How wind is pushing gas out of the power market and cutting costs**, October 2025

[16] E3G & ECIU, **Cost of the fossil fuel crisis in the UK**, November 2025

[17] The Times, **Energy price cap surge to push up bills by £221 in July**, May 2026

[18] E3G, **Cost of the fossil fuel crisis in the UK**, November 2025

The core threats identified are:

Threat	Likelihood (low–high)	Impact (low–high)	Resilience / recoverability (low–high)	Threat level (low–critical)
2a – Inflation and inability to absorb increased costs and bills	High	High	Low	Severe
2b – Loss of financial agency and impact on societal security	Medium	High	Low	Substantial
2c – Impact on productivity and growth projections which then impact cost of debt	High	Medium	Low	Substantial–Severe
2d – Lower fiscal headroom and increased cost of debt-servicing	High	High	Low	Severe
Overall judgement				Severe

These risks place energy efficiency, heating electrification and market reform firmly within the remit of macro-economic risk management. For central banks, the goal should be to incorporate energy-system vulnerabilities into a clearer assessment of how external shocks translate into domestic financial pressures. For government, the implication is unambiguous: stabilising the energy–inflation–interest rate cycle requires reducing the economy's exposure to fossil-fuel volatility at its source.

Key recommendations

Affordable electrification

Treasury to prioritise action to make home electrification affordable and ensure it is cheaper to use a heat pump than a gas boiler.

Break the link between gas and electricity

Reform the electricity market to break the link between the price of gas and the price of electricity to encourage electrification and ensure the cheaper price of renewables generation reaches the consumer.[19]

Security and Resilience Bond

HMT to a launch a sovereign Security and Resilience Bond to accelerate investment in the electrification of the UK economy, including its housing stock, and deliver resilience for UK infrastructure and communities to the impacts of climate change. Thematic bonds tend to attract higher prices and be less vulnerable to capital flights during times of crisis.

III. Threat to political legitimacy and societal security

The UK's geopolitical and diplomatic legitimacy is undermined by the inability to produce security where it is felt by people: in homes. This has led to lower trust in politicians, openness to dis- and misinformation and a reduced adaptive capacity within society. This can be self-reinforcing, as people are more likely to believe disinformation if they distrust public institutions.[20]

The core threats identified are:

Threat	Likelihood (low–high)	Impact (low–high)	Resilience / recoverability (low–high)	Threat level (low–critical)
3a – Degradation of political legitimacy; government is not viewed as willing or able to resolve (existential) concerns or meet basic needs	High	High	Low	Severe

[19] Commonwealth, **Fixing the Price: How a Single Buyer Model Could Slash UK Electricity Prices and Build Consent for the Clean Power Mission**, June 2026

[20] Ofcom, **https://www.ofcom.org.uk/media-use-and-attitudes/online-habits/online-nation**, December 2025

Threat	Likelihood (low–high)	Impact (low–high)	Resilience / recoverability (low–high)	Threat level (low–critical)
3b – Loss of political agency; recurrent crises render political power and independent decision making difficult to exercise	Medium	High	Medium–High	Moderate
3c – Mis- and disinformation; the population is susceptible to campaigns of mis- and disinformation	High	High	Low	Severe
3d – Societal insecurity; a sense of personal and community insecurity, that society is dysfunctional and that basic needs cannot be met	High	High	Medium–High	Severe
3e – Weakening of democratic system; democratic values are challenged; democratic institutions undermined; democratic trust is low	High	High	Low	Critical
3f – Loss of adaptive capacity; the ability of governments and people to be willing to adapt to changing circumstances and climate, operate strategically, or escape a cycle of short-term crisis management	Medium–High	High	Low	Severe
Overall judgement				Severe–Critical

The key weakness of fossil fuel dependency lies in climate and health impacts, and in the loss of autonomy and agency over decision-making at the level of national policy setting and the individual household. Fossil fuels also drive inequality. Fossil fuel dependence hits the poorest households in society hardest. In 2024, households spent, on average, 8% of their income on energy,[21] but for low-income households this goes up to as much as 41%.[22] This drives wealth inequality, which disconnects voters from politics and erodes the faith that government can address the very challenges that threaten them.

There is a well-established relationship between widening inequality, economic stress and political instability. Historical work by Luke Kemp[23] identifies inequality as a recurring feature in cases of societal breakdown across all of recorded history. Addressing this risk requires a re-democratisation of energy that is local, affordable and does not produce further wealth inequality and negative climate outcomes.

Hostile states, malign actors and special interest lobbyists are also deliberately sowing division on clean energy to slow the energy transition, to keep the UK fossil fuel dependent and vulnerable and to use economic hardship produced by fossil fuel crises to undermine social cohesion.

Key recommendations

Decentralise and electrify

The Department for Energy Security and Net Zero to prioritise decentralisation of UK energy and storage to communities and households. To include significantly expanding community energy and providing more grant funding for home electrification and adaptation.

Fossil fuel dependency on National Risk Register

Cabinet Office to classify the risk of fossil fuel dependency for home heating as a distinct and "chronic risk" in the next edition of the National Risk Register, defined as a threat to "our economy, community, way of life, and national security" manifesting over a decades-long timeframe, requiring a robust government-led response – all of which applies directly to fossil fuel reliance.

Combat disinformation

Government and Joint Intelligence Committee to launch a joint inquiry into action by hostile states, malign actors and special interest lobbyists to spread disinformation regarding clean energy to perpetrate fossil fuel dependence and sow division.

[21] Bank of England April 2026 Monetary Policy Report

[22] Citizens Advice, **Essential bills "eating away" at incomes of lowest earners**, Mar 2025

[23] Luke Kemp, **Goliath's Curse**, 2026

Conclusion

Fossil fuel dependency is a persistent, recurring, and compounding national security threat, especially in relation to the gas reliance of UK homes for heating. It is at the core of most vulnerabilities of the UK's housing stock and exacerbates conditions of insecurity and other threats to life and livelihoods.

The stakes are high, but so is the potential for making a significant intervention to improve the UK's structural vulnerabilities. If decisive action is taken to electrify homes, the UK will be better positioned to reduce its exposure as a target for sabotage or coercion, withstand macroeconomic turbulence, address climate insecurities and restore public confidence in the state's ability to provide security.

Key facts

Britain's reliance on gas

85% of the UK's 30 million homes are heated by gas boilers, collectively consuming the lion's share (more than one-third) of all gas used in the UK annually.[24] Roughly half of this gas is currently imported.[25]

It is estimated that more than two-thirds of gas will need to be imported from overseas by 2027 however many new exploration licenses are issued, rising to 94% by 2050.[26] In just twenty to thirty years, if the UK does not undergo an accelerated transition to electrified heat, it will be effectively entirely reliant on imported gas for home heating.

The UK's economically viable North Seas gas reserves are in terminal decline, already depleted by between 85% and 93%.[27]

New oil and gas discoveries licensed over 14 years by the previous UK Conservative governments have to date produced in total just over one month's worth of gas.[28]

Replacing a gas boiler with an electric heat pump for space heating and hot water reduces an individual home's reliance on gas by 74%.

Installing solar panels can reduce a typical UK home's grid electricity consumption by 20–40%, rising to over 50% with battery storage, while helping to reduce peak-time grid demand.[29]

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[24] Energy UK, **Fuelling the future: Prioritising the gas transition for Net Zero**, accessed 20/05/2026
[25] Department for Energy Security and Net Zero, **Digest of UK Energy Statistics (DUKES) 2025**, July 2025
[26] Renewable UK, **Can North Sea oil and gas really power Britain's future?**, September 2025
[27] Uplift, **The Declining Economics of the North Sea**, November 2025; ECIU, **Around 90% of UK North Sea oil and gas 'already drained dry' – analysis**, March 2026
[28] Uplift, **Just One Month's Gas Supply From 14 Years of Licensing by Previous Government**, March 2026
[29] Green Match, **Average Monthly Electricity Bill With Solar Panels UK (Guide 2026)**, October 2025

According to research from the Gas Safe Register, the average UK household wastes £784 annually on preventable energy losses (of which two-thirds arise from heating system inefficiencies and water heating waste). This figure represents nearly 23% of the typical household's energy bill.[30]

The cost of fossil fuel crises

The fossil fuel crisis caused by the invasion of Ukraine cost the government a total of £183 billion.[31] For context, that is twice the UK's total defence spending for the 2025–26 financial year.[32] One fossil fuel crisis costs as much as the net cost of transitioning the UK to net zero.[33]

The war in Ukraine has already cost the average UK household £2,200 due to higher energy bills.[34]

The initial supply chain disruption from the closure of the Strait of Hormuz resulted in wholesale gas prices rising 50% in a matter of days.[35] This ongoing conflict has led Ofgem to raise the energy price cap in the summer of 2026 by 13%, pushing energy bills up by an average of £221a year.[36]

Gas continues to set the marginal price in the UK 60 - 85% of the time,[37&38] compared to 40% in Germany or 15% in Spain,[39] giving it an outsized impact on retail electricity prices.

In 2024, UK households spent, on average, 8% of their income on energy.[40] However, for low-income households this goes up to as much as 41%.[41]

Within weeks of Russia's full-scale invasion of Ukraine in February 2022, European gas benchmarks surged, up more than 25% in the first two weeks, directly resulting in domestic inflationary pressure, contributing to the UK's peak inflation rate of 11.1% in October 2022,[42] with energy inflation at 58.6%.[43]

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[30] Gas Safe Register, **UK Household Energy Waste: How Much Money Goes Down the Drain**, July 2025
[31] E3G, **Cost of the fossil fuel crisis in the UK**, November 2025
[32] House of Commons Library, **UK defence spending**, October 2025
[33] Climate Change Committee, **Cost of Net Zero by 2050 less than a single fossil fuel price shock,** March 2026
[34] E3G & ECIU, **Cost of the fossil fuel crisis in the UK**, November 2025
[35] The Independent, **How the Iran-US war could affect cost of living in the UK – from energy bills to petrol and groceries**, March 2026
[36] The Times, **Energy price cap surge to push up bills by £221 in July**, May 2026
[37] Gov.uk, **Decisive action to break influence of gas on electricity prices**, April 2026
[38] ECIU, **"Marginal Gains. How wind is pushing gas out of the power market and cutting costs",** October 2025
[39] Ember, **Latest energy shock reminds Europe of its risky gas reliance**, 13 Mar 2026
[40] Bank of England April 2026 Monetary Policy Report
[41] Citizens Advice, **Essential bills "eating away" at incomes of lowest earners**, Mar 2025
[42] OBR, **Fiscal Risks and Sustainability**, July 2023.
[43] **Gas and electricity prices during the 'energy crisis' and beyond** - House of Commons Library

Six in ten Britons doubt that energy bills will ever become genuinely affordable. Only a quarter of the population believes the government has a coherent strategy to reduce household energy costs.[44]

By mid-2025, the average energy bill was approximately £1,709–1,896, roughly £750 higher than before the fossil fuel induced crisis (equivalent to an additional monthly mortgage payment for the average household).[45]

Household energy debt reached £4.43bn by Q2-2025, more than triple pre-crisis levels, and over one million customers held electricity or gas debt without repayment plans.[46]

How renewables mitigate fossil fuel crises

UK investment in wind power has already saved consumers around £104 billion between 2010 and 2023 by lowering electricity prices and reducing demand for natural gas, which has helped offset rising gas costs.[47]

Wind power reduced the wholesale price of electricity by up to a quarter (25%) in 2024, due to wind power diluting the link between power prices and gas prices.[48]

Despite the summer 2026 price cap rising 13% due to the gas shock of the Iran war, for the first time in a major energy crisis, UK electricity prices are not rising in lockstep with gas prices thanks to the rollout of renewable energy.[49] Purely looking at wholesale costs, the Iran war has led to an increase in gas prices of ~54%, whereas the increase in electricity price has been just 17%.[50]

The national security risks of gas dependency

The UK is reliant on four strategically vulnerable gas infrastructure clusters:

- The St Fergus Gas Terminal on the northeast coast of Scotland near Peterhead (25–50% of UK gas supply), supplied by the Norwegian Vesterled, Tampen Link, and Gjøa pipelines.

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[44] More in Common, **https://www.moreincommon.org.uk/latest-insights/britain-s-high-energy-bills-the-permacrisis-that-keeps-on-burning/,** September 2025

[45] The Guardian, **Cost of global energy crisis on households in Great Britain 'to hit £3,000 by summer'**, February 2025

[46] Ofgem, **Debt strategy update: supporting the reduction of energy debt**

[47] University College London, **Wind power delivers £104 billion net benefit to UK consumers**, October 2025

[48] Energy and Climate Intelligence Unit, **Analysis: Growth in British renewables cutting electricity prices by up to a quarter**, October 2025

[49] Nesta, **The energy price cap: the post-Iran crisis is pushing up bills, but clean power may be lowering them**, May 2026

[50] Ben James, **Gas – Electricity Linkage** (as of 09/06/2026)

- The Bacton hydrocarbon gas processing plant near Great Yarmouth (up to 33% of UK gas supply), supplied by the BBL pipeline from the Netherlands and the IUK interconnector from Belgium.
- The Isle of Grain LNG Terminal in Kent (up to 25% of UK gas supply).
- South Hook & Dragon LNG Terminal near Milford Haven (up to 20% of gas supply).

In contrast, the UK's existing and expanding electricity network consists of over 1.7 million renewable generation sites.[51]

Clustered gas infrastructure positions present serious defence challenges and are not rapidly repairable in the event of attack. Pipelines are actively being scoped by highly capable undersea warfare and seabed sabotage divisions.[52]

Threats posed by reliance on gas for heating become more acute and potentially lethal if adversaries were to "weaponise winter" through assault on civilian infrastructure.[53]

The solution is to decentralise our energy system through strategic deployment of renewables, which have proven to be more resilient and repairable in conflict and sabotage scenarios than gas infrastructure.[54]

Heat pump adoption in the UK languishes at just 24 heat pumps for every 1,000 households. In Norway, there are 662 per 1,000 homes.[55]

People are more likely to believe disinformation if they distrust public institutions.[56]

[51] Department for Energy Security and Net Zero, **Regional renewable electricity in 2024**, September 2025
[52] RUSI, **Stalking the Seabed: How Russia Targets Critical Undersea Infrastructure**, May 2023
[53] Reuters, **Ukraine is showing why electrification is key to Europe's energy security**, February 2026
[54] University of Oxford, **Enabling and Ensuring a Net-Zero Aligned Carbon Market for Ukraine**, November 2025
[55] Chatham House, **Norway can teach the UK about energy security – but the lesson is not more North Sea drilling**, April 2026
[56] Ofcom, **https://www.ofcom.org.uk/media-use-and-attitudes/online-habits/online-nation**, December 2025

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