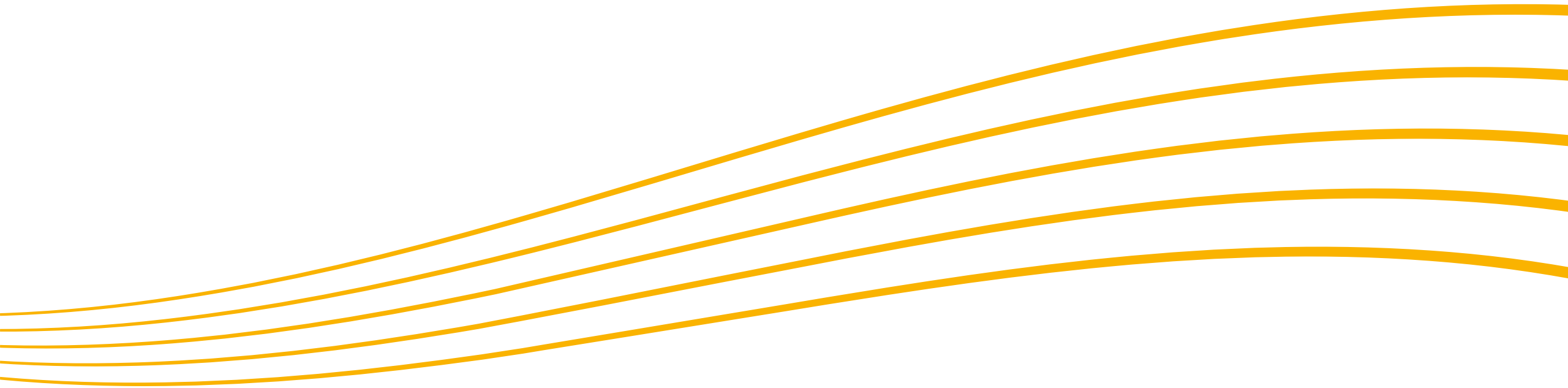


## RFI Analysis for CDB



# High-level view of the RFI results

## Number of responses

2576 responses

## Response Rate by project count (against total connections in queue)

D = 30% of all Distribution connections  
T = 59% of all Transmission connections

## % of Projects that responded that can meet Gate 2 today

D = 60% (53GW)  
T = 57% (184.2GW)

## Response Rate by MW

D = 54% (91.3GW)  
T = 68% (368.5GW)

## Split of Responses

D = 1337  
D with BEGA / BELLA = 338  
T = 901

## % of Projects by response rate that can meet Gate 2 by 1<sup>st</sup> Jan 2025

D = 88%  
T = 79%

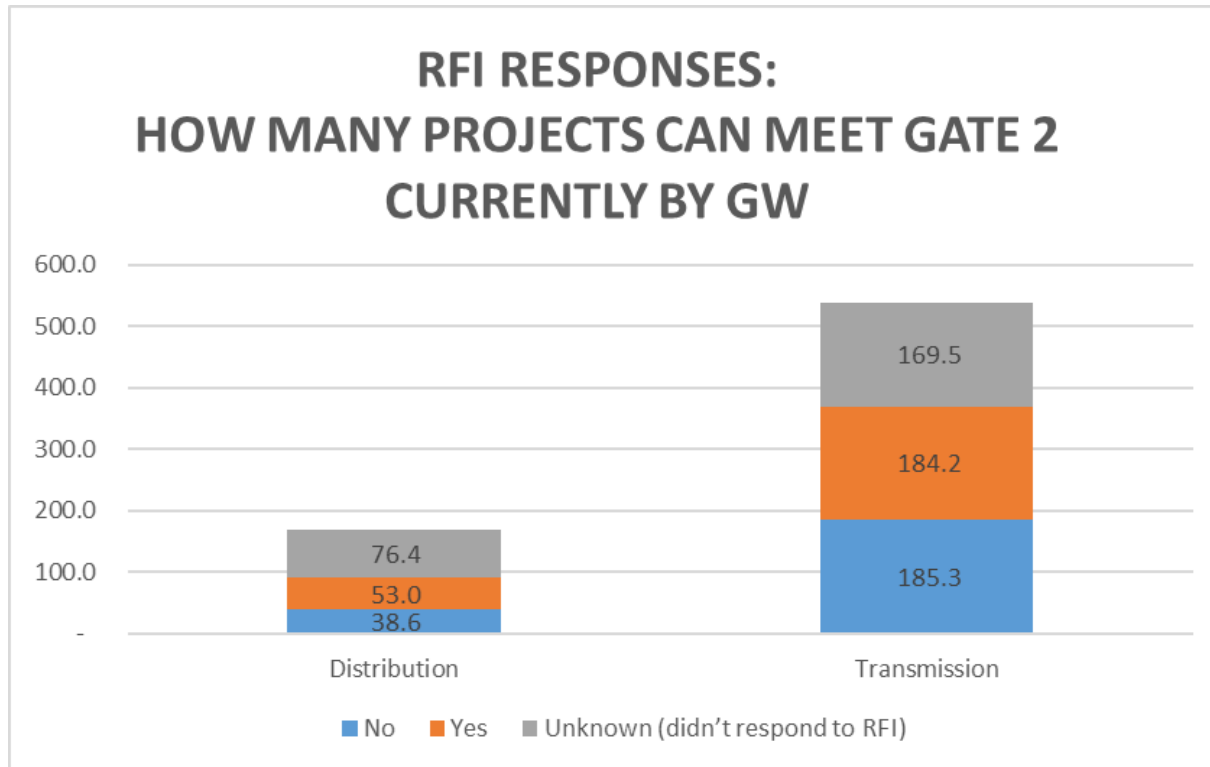
## % of Projects that responded by MW that can meet Gate 2 by 2025

D = 87% (79.1GW)  
T = 69% (255.6GW)

## Technology split

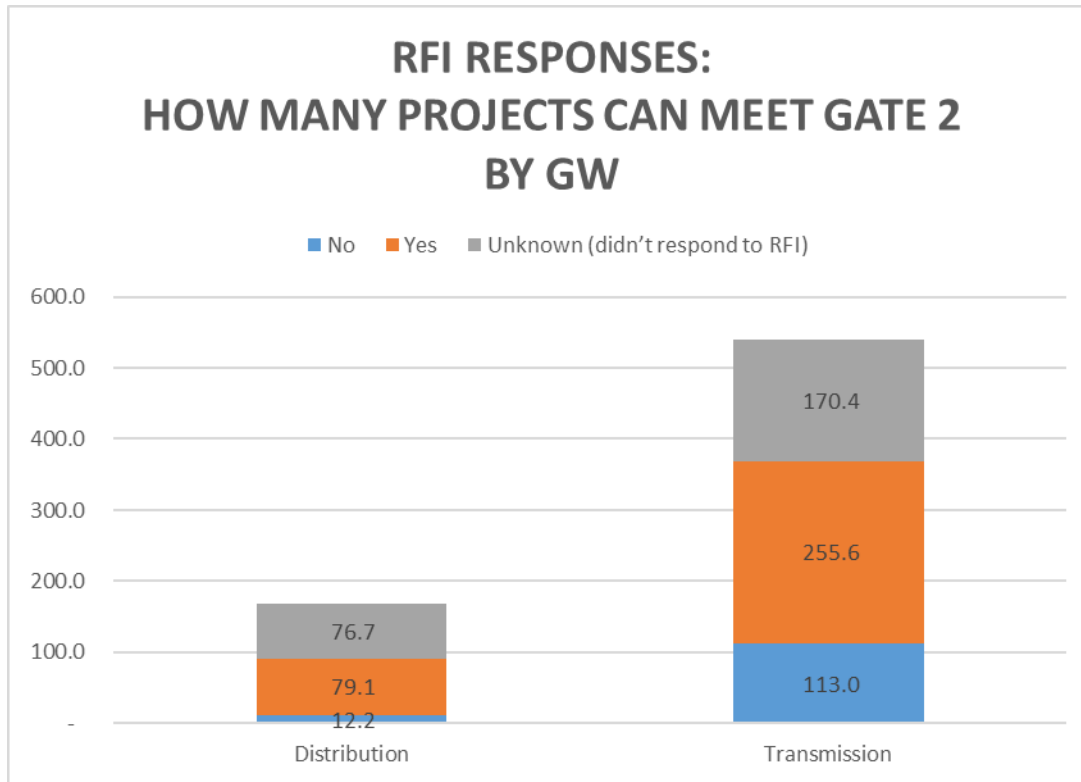
Largest response from Solar & Storage (359GW combined) with 69% of those respondents stating they could meet Gate 2

## Ability to Meet Gate 2 Currently



- This slide sets out (by GW) the projects that have said that they could currently meet Gate 2. We have also incorporated those who did not respond.
- For those connecting at distribution, this is 53GW which is 31% of the total distribution capacity. The ability to meet Gate 2 is unknown for 45% of the distribution capacity.
- For those connecting at Transmission, this is 184.2GW which is 34% of the total transmission queue. The ability to meet Gate 2 is unknown for 31% of the transmission capacity.

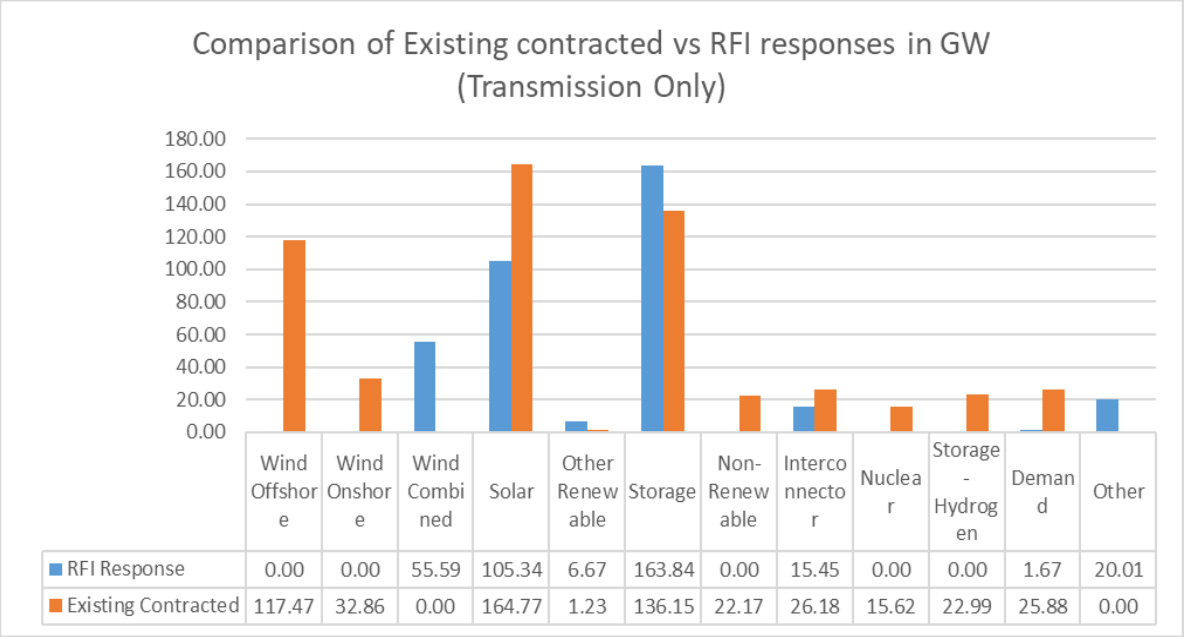
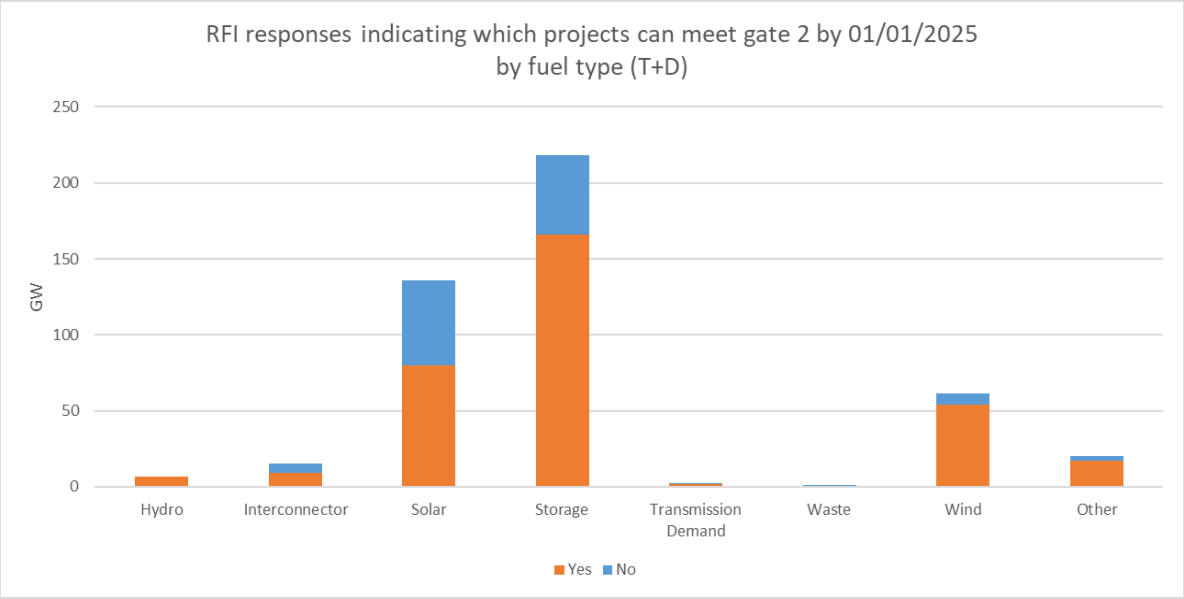
## Ability to Meet Gate 2 by 1 Jan 2025



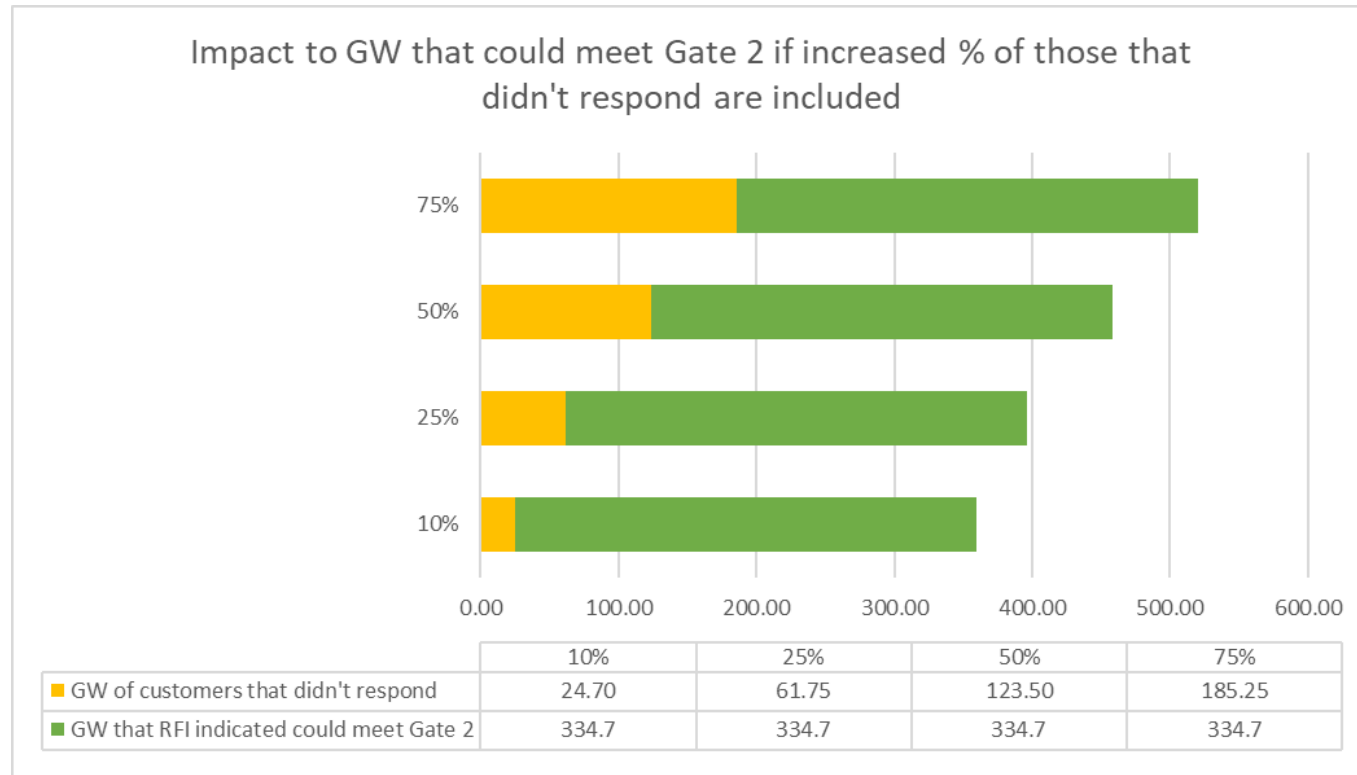
- This slide sets out (by GW) the projects that have said that they could meet Gate 2. We have also included those that that did not respond to the RFI.
- The figures are cumulative from the previous slide.
- For those connecting at distribution, this is 79.1GW which is 47% of the total distribution capacity. The ability to meet Gate 2 is unknown for 45% of the distribution capacity.
- For those connecting at Transmission, this is 255.6GW which is 47% of the total transmission queue. The ability to meet Gate 2 is unknown for 31% of the transmission capacity.

# Technology Split

- This slide shows the breakdown of technology types (by GW) and shows the split between those who have indicated that they could meet Gate 2 by 1 Jan 2025 and those who have stated that would not be able to meet Gate 2 by 1<sup>st</sup> January 2025. This is across both Transmission and Distribution.
- The highest proportion of responses came from Solar and Storage developers, which accounts to a combined 353.9GW total. Of that 353.9GW, over 245GW of Solar and Storage stated that they could meet Gate 2 criteria by 1<sup>st</sup> Jan 2025.
- The second graph shows a comparison between the technology types of the known contracted position vs RFI responses. Please note, the comparison data is from the June Databook and is the accepted offers from the queue excluding connected parties and uses only Transmission data. Therefore, this graph is only including Transmission data from the RFI. Also, the RFI did not differentiate between onshore and offshore wind, so a combined wind criteria was added to cover both.

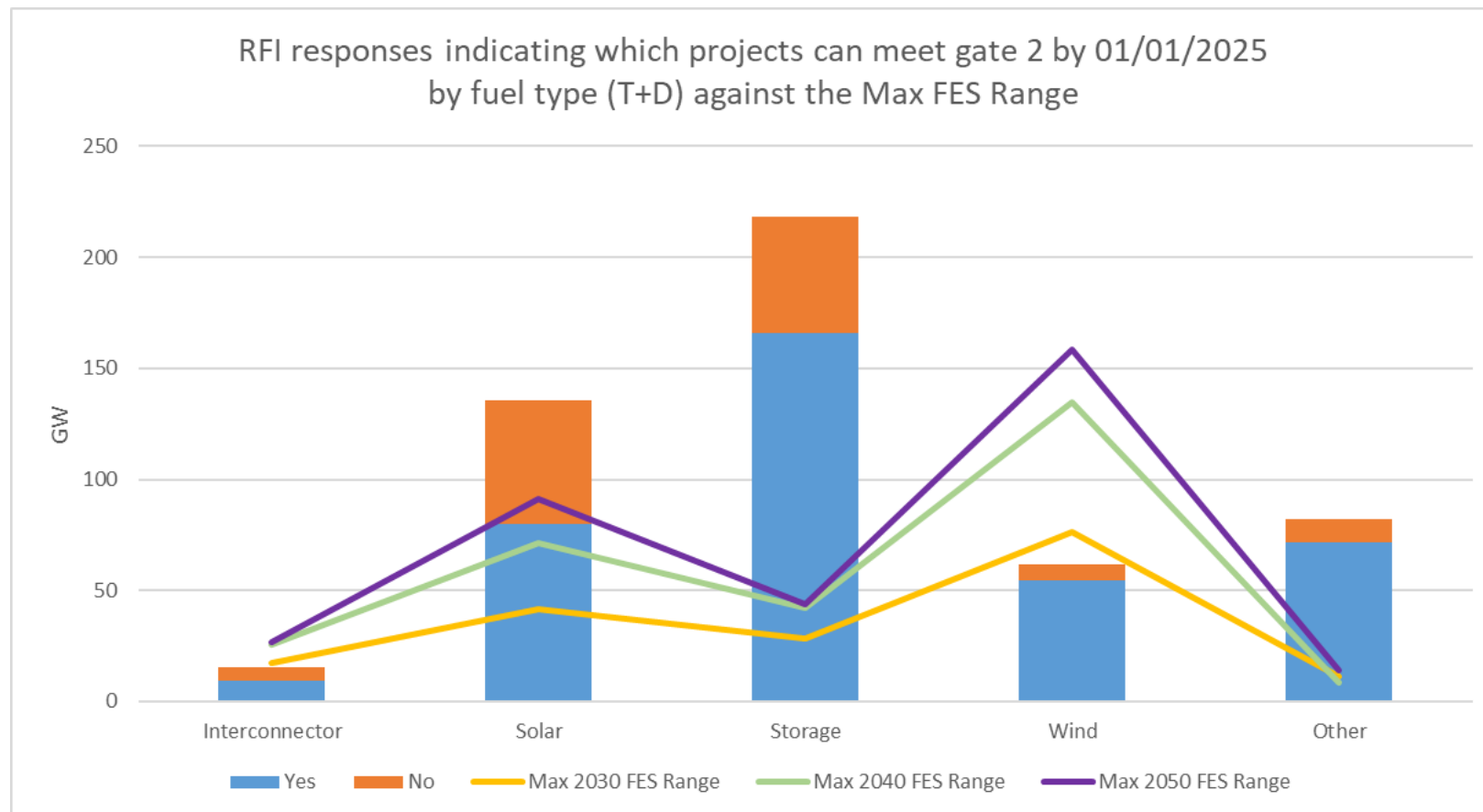


# Impact of Non-respondents



- This graph shows the impact should varying increased percentages of those that did not respond to the RFI we able to meet the Gate 2 Criteria by 1<sup>st</sup> Jan 2025.
- This is across both Transmission & Distribution. This graph makes an assumption that the GW that have indicated they could meet Gate 2 remains static across all scenarios.
- This is based on 247GW not having responded to the RFI. If 10% were to advise that they could meet Gate 2, this would take the total GW to 359.4. If 75% of the 247GW that didn't respond were able to meet the criteria, this would result in a total of 519.95GW meeting Gate 2 criteria.

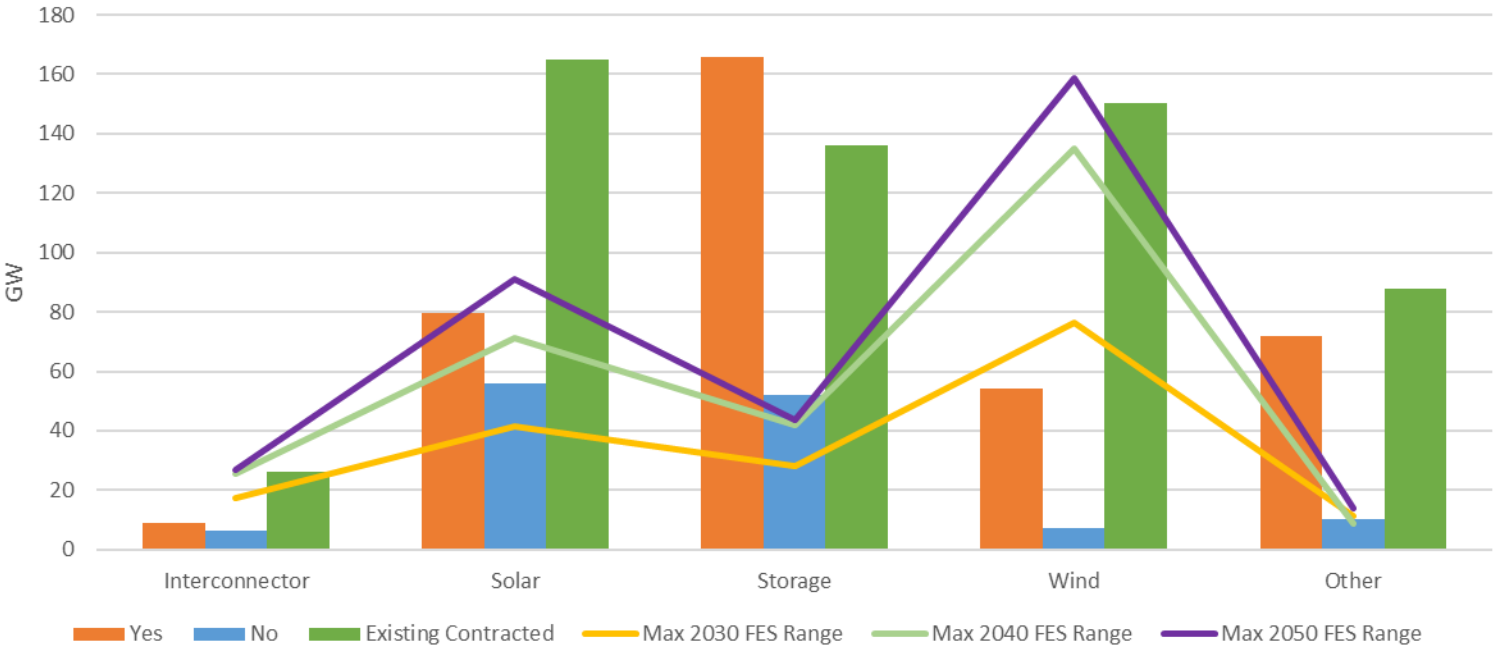
# RFI vs FES Data



- This graph shows the responses of the main technology types of responses (across both Transmission and Distribution). Against this we have mapped the max FES range.
- This is based on the 2023 FES data.
- The RFI responses are a combination of both transmission and distribution.
- Due to low levels of responses across other technologies, the ESO have focused primarily on Solar, Storage, Wind and Interconnectors. Other technologies (not including nuclear or fossil fuels) have been incorporated under "other".
- The graph demonstrates that there appears to be a significant amount of solar and storage connections whereas there appears to be a shortage of wind connections.

# RFI vs FES Data Continued

RFI Responses Indicating Which Projects can Meet Gate 2 by 01/01/2025  
by Fuel Type (T+D) Against the Max FES Range (includes existing contracted &  
non-respondents)

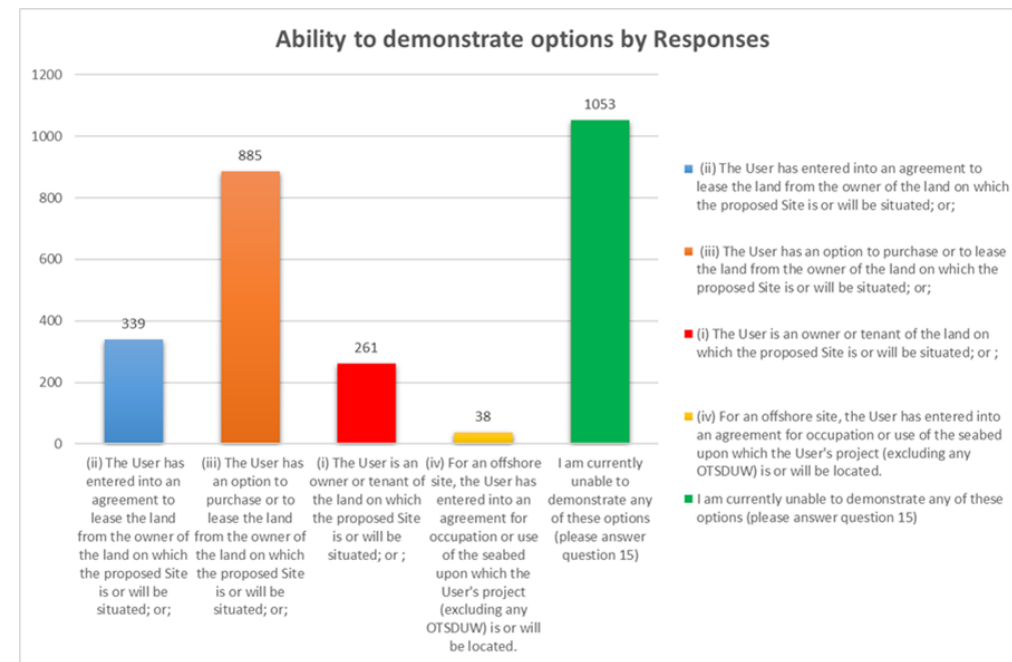


- As requested, this graph include the existing contracted (as per the data from the June data book which has been used for consistency)
- Please note, the other range for existing contracted contains nuclear, “other renewables”, non-renewables and storage hydrogen. In addition, Wind has combined both onshore and offshore.

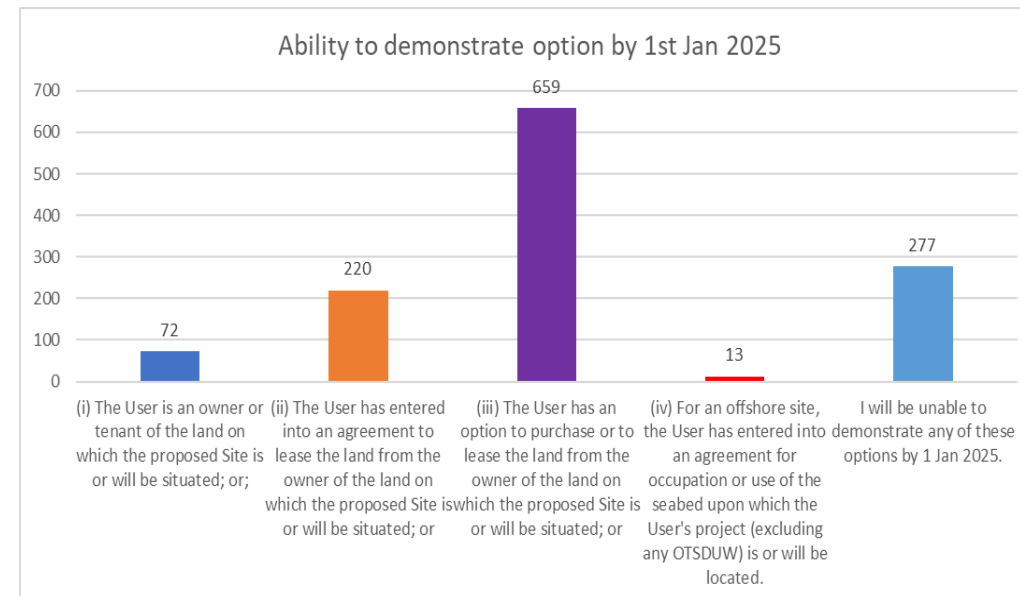


# Ability to Demonstrate Options

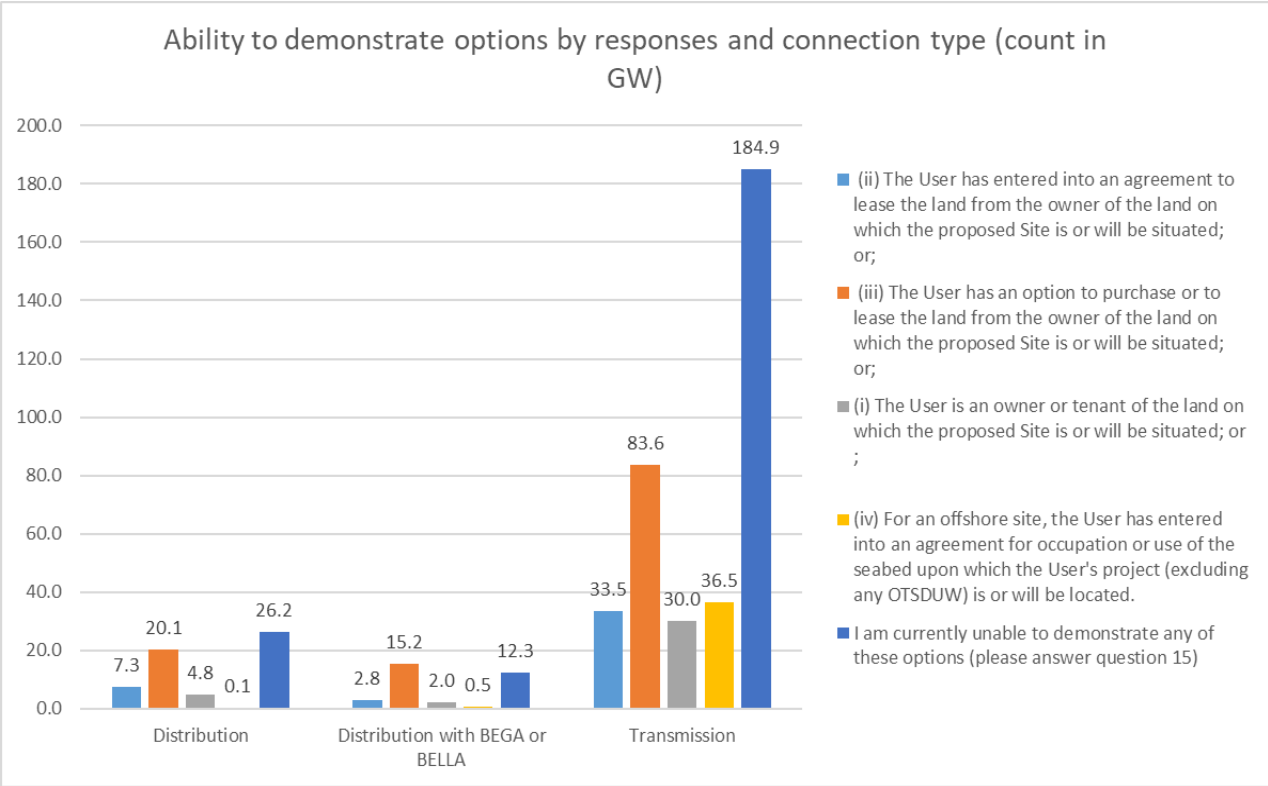
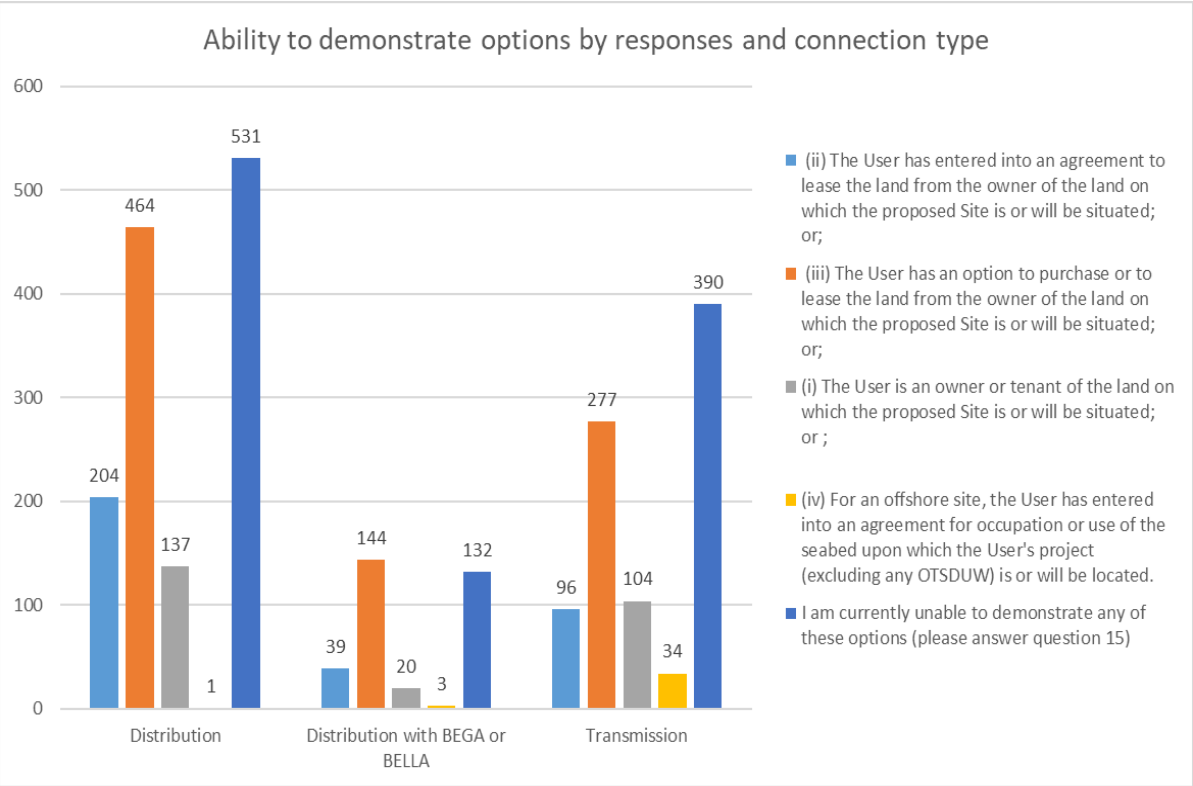
- This first graph sets out the number of responses across both Transmission and Distribution (including those with BEGA/BELLAs) and the selection of those that could demonstrate evidence as of today that they could meet the criteria.
- Of the 2576 response, 59.1% (236GW) of respondents advised that they would be able to demonstrate an option today.



- The second graph demonstrates the numbers that would be able to demonstrate their option by 1<sup>st</sup> Jan 2025.
- Of the 1241 that responded to this question, 78% (359GW) advised that they would be able to demonstrate an option by 1<sup>st</sup> Jan 2025. *To note, there is likely to be some double counting in these figures, therefore, the 22% may be an underestimation.*



# Ability to Demonstrate Options (Continued)



# Ability to Provide Evidence



- This graph sets out the ease of parties to provide evidence, should the ESO request it today.
- Confidence was high for those who said that they could provide evidence, with 1510 responses to say that it would be extremely easy to provide evidence of land rights.
- However, a number of parties made it clear that they would not be able to provide this evidence across all categories, including those who had said that they could demonstrate an option (152 responses).