

# Delivery pipeline outcomes

Connections reform

Webinar

8 December 2025

# Delivery pipeline results

Kayte O'Neill

# Getting to today

NESO and the networks worked hand-in-hand with government, Ofgem, industry, investors, and customers to design connections reform.



60+

Industry  
workgroups



3000+

Transmission and  
Distribution applications  
reviewed in 5 months



172

Consultation responses,  
showing the scale of  
collaboration.

# Assurance

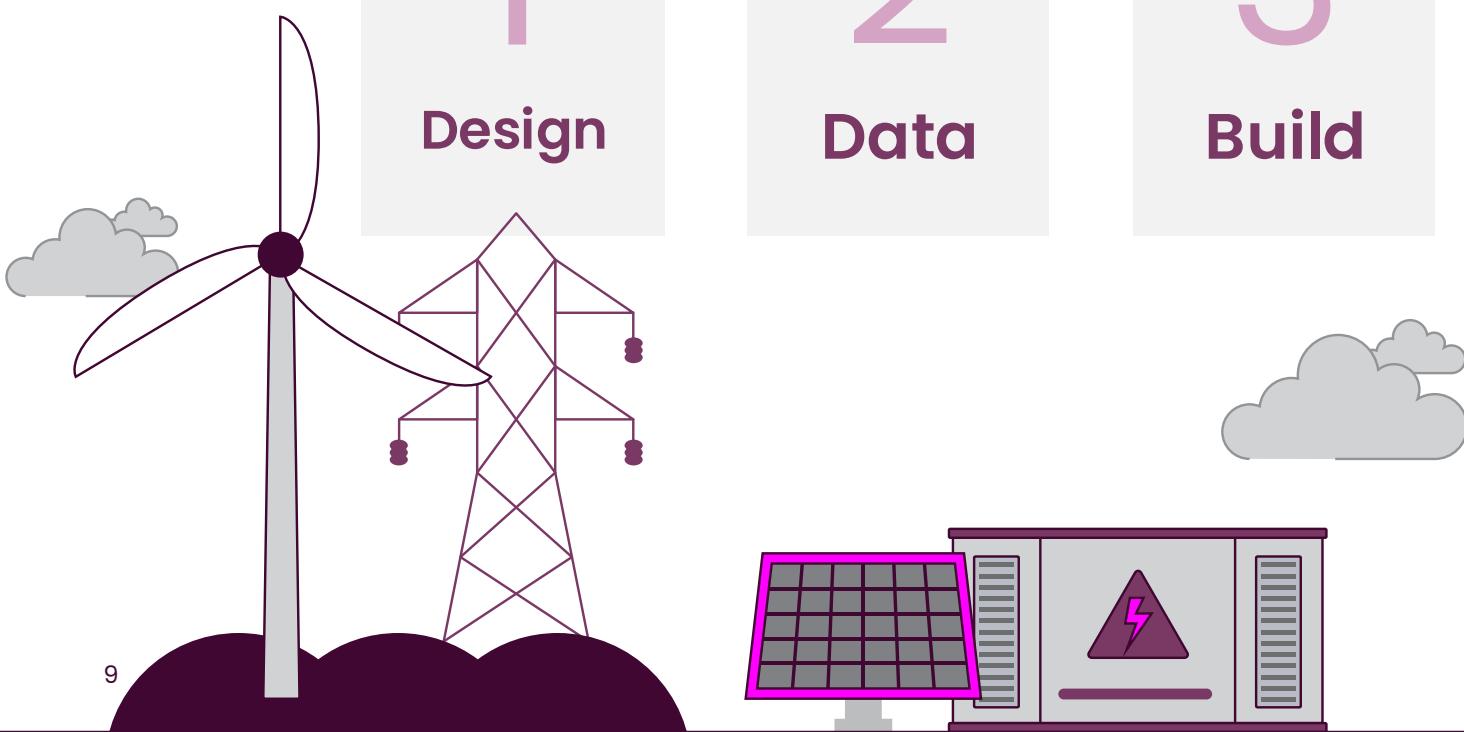
We have conducted extensive amounts of assurance on the queue formation activity:

1  
Design

2  
Data

3  
Build

4  
Queue run



# The new pipeline



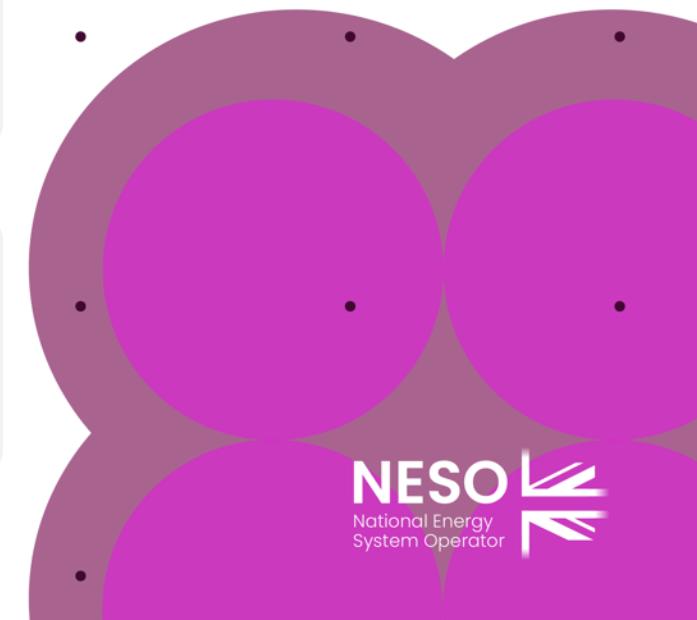
Energy projects which are most developed and aligned to national targets will now progress



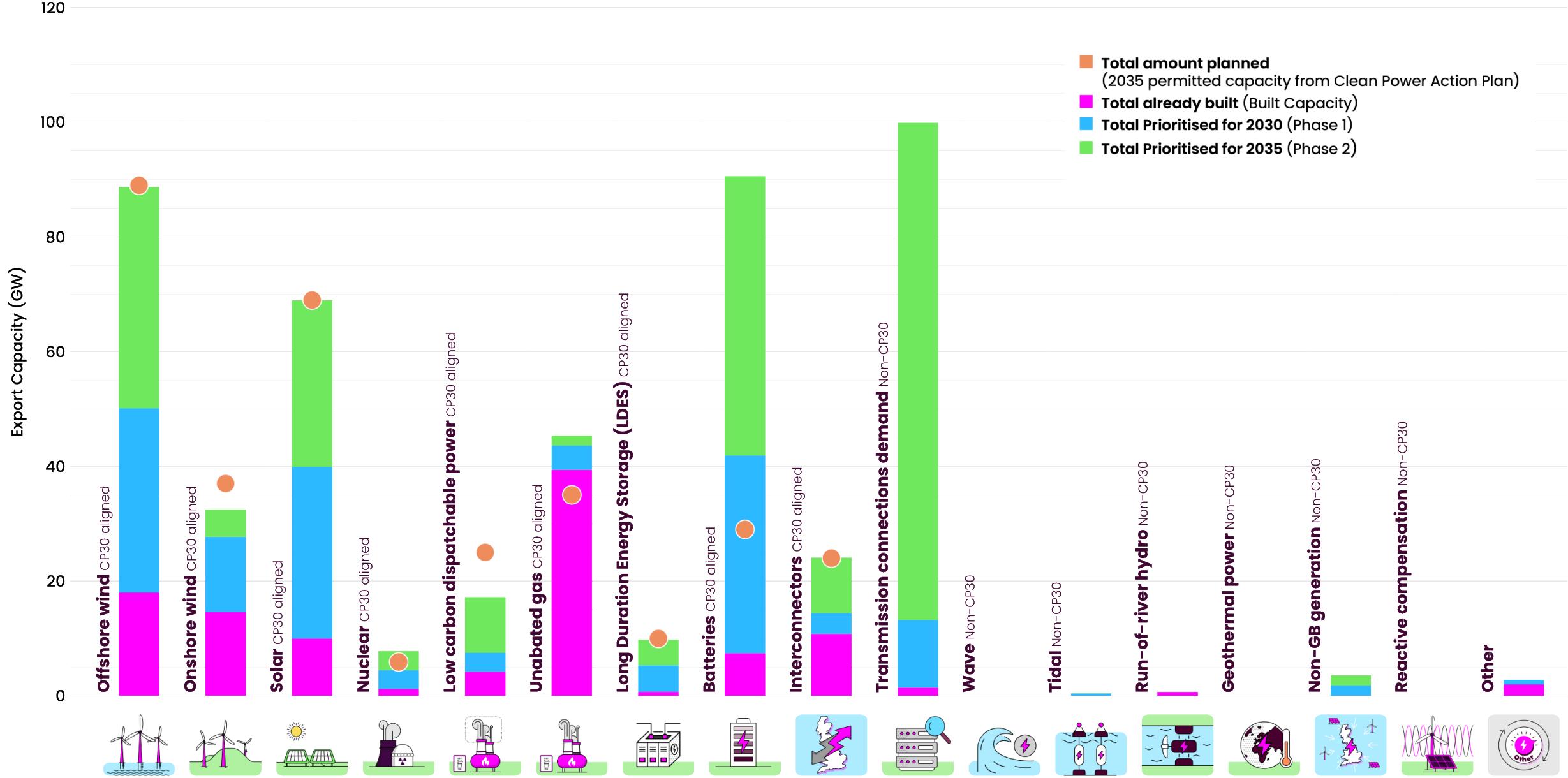
283 GW of generation and storage and 99 GW of demand unlocked



Clean Power 2030 needs can be met



# Great Britain's new connections delivery pipeline

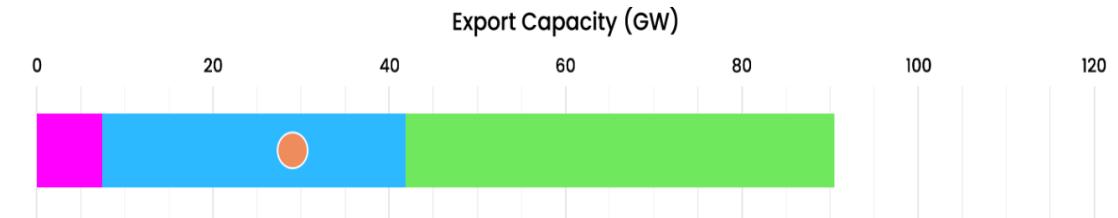
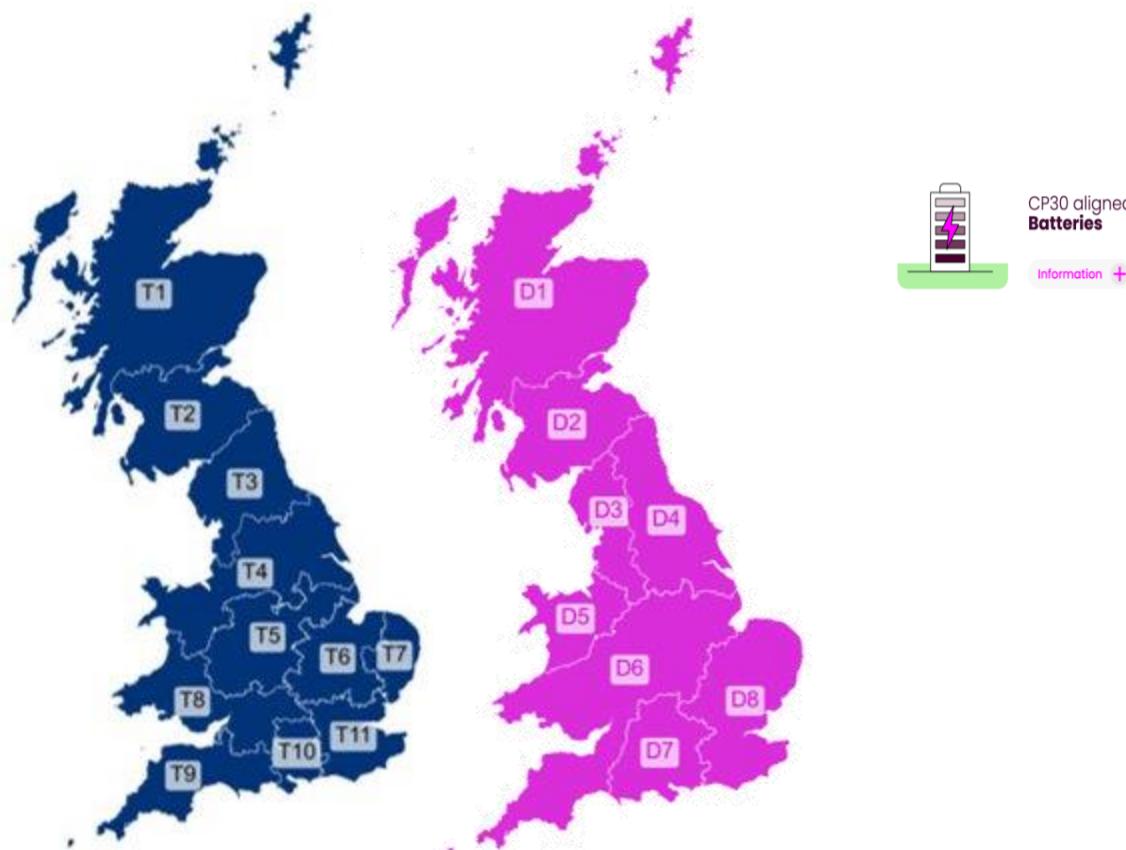


# Results by Technology

Matt Magill

# Batteries

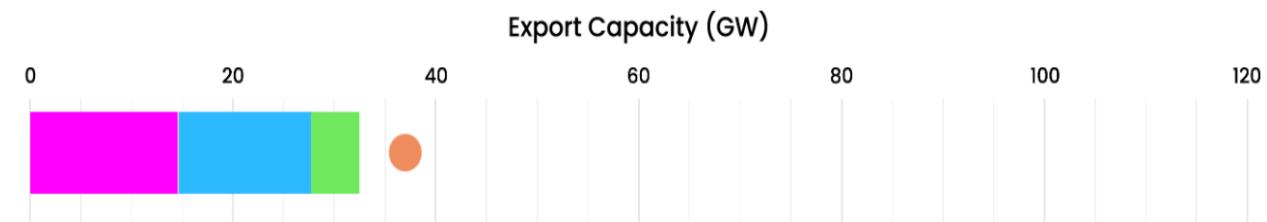
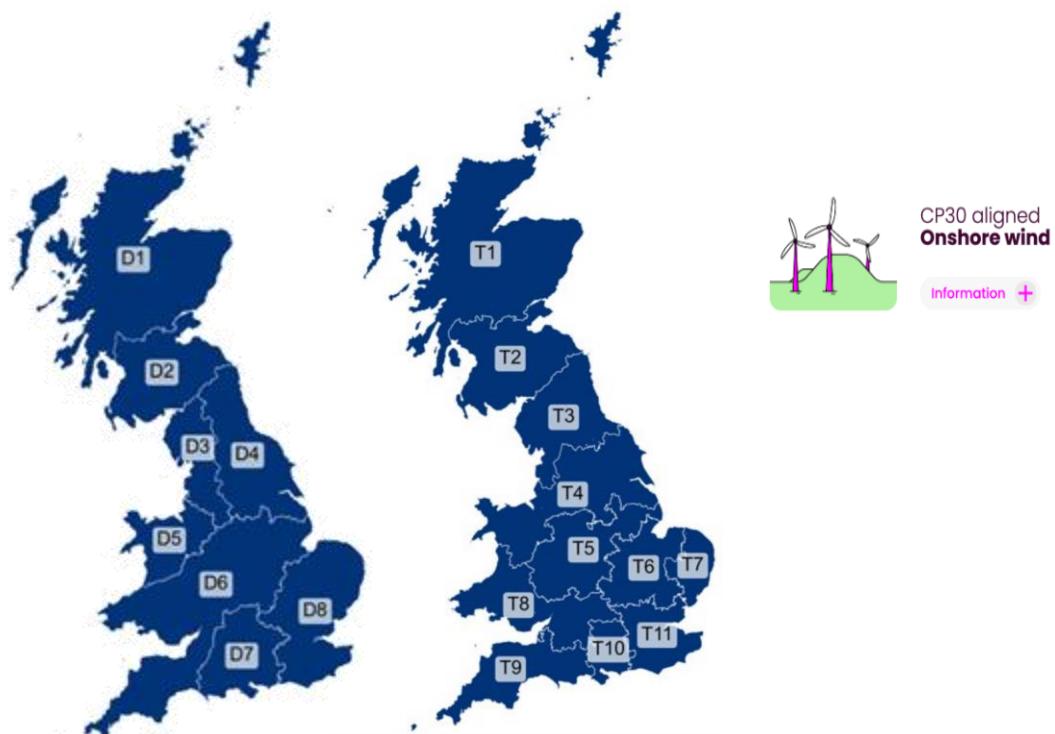
Only protected batteries were prioritised - 83 GW. The oversupply of Batteries by 2035 is 62 GW. Due to the large number of protected batteries, some projects phases will have been changed during queue formation



**Signature date of last prioritised project**- All Distribution and All Transmission Zones were filled by protected projects. Some projects will also have been moved to Phase 2

# Onshore Wind

Protected projects have been prioritised in Scotland.  
England and Wales' zones are undersupplied

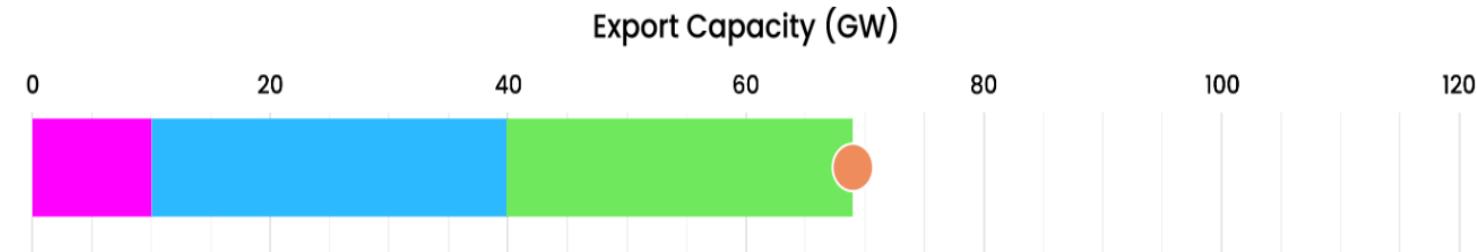


**Signature date of last prioritised project** – England and Wales was undersupplied, Scotland was filled by protected projects

# Solar

Most Zones undersupplied in Phase 1.

Most zones oversupplied in Phase 2. T3, T8, T9 have remaining capacity



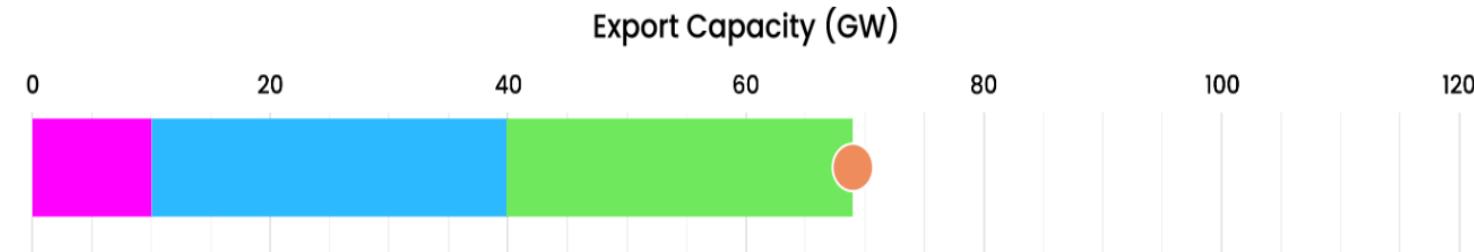
## Signature date of last prioritised project

Zone	Date	Zone	Date
T1	27/06/24	T6	19/12/22
T2	28/04/22	T7	30/06/23
T4	11/01/23	T10	05/06/25
T5	08/09/21	T11	07/12/23

# Solar

Most Zones undersupplied in Phase 1.

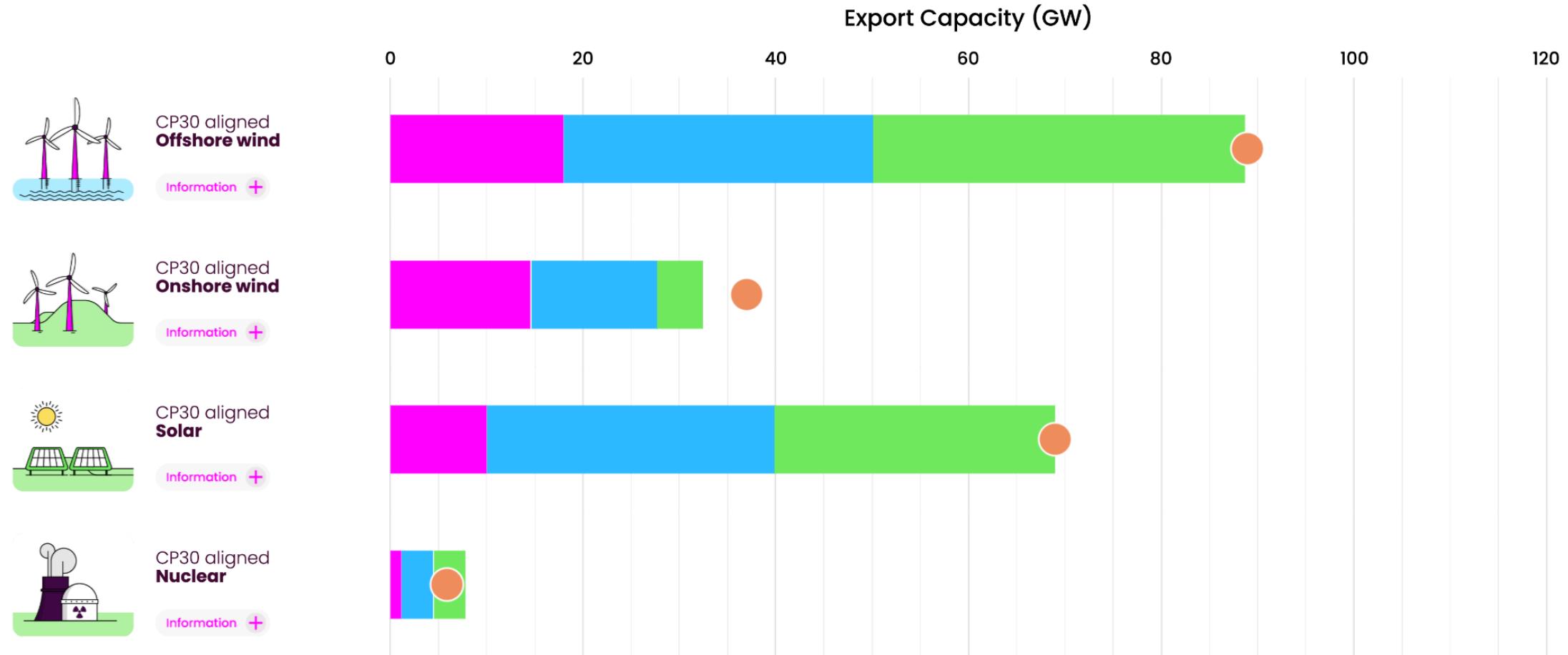
Most zones oversupplied in Phase 2. ~~T3, T8, T9~~ T4, T5 and T10 have remaining capacity



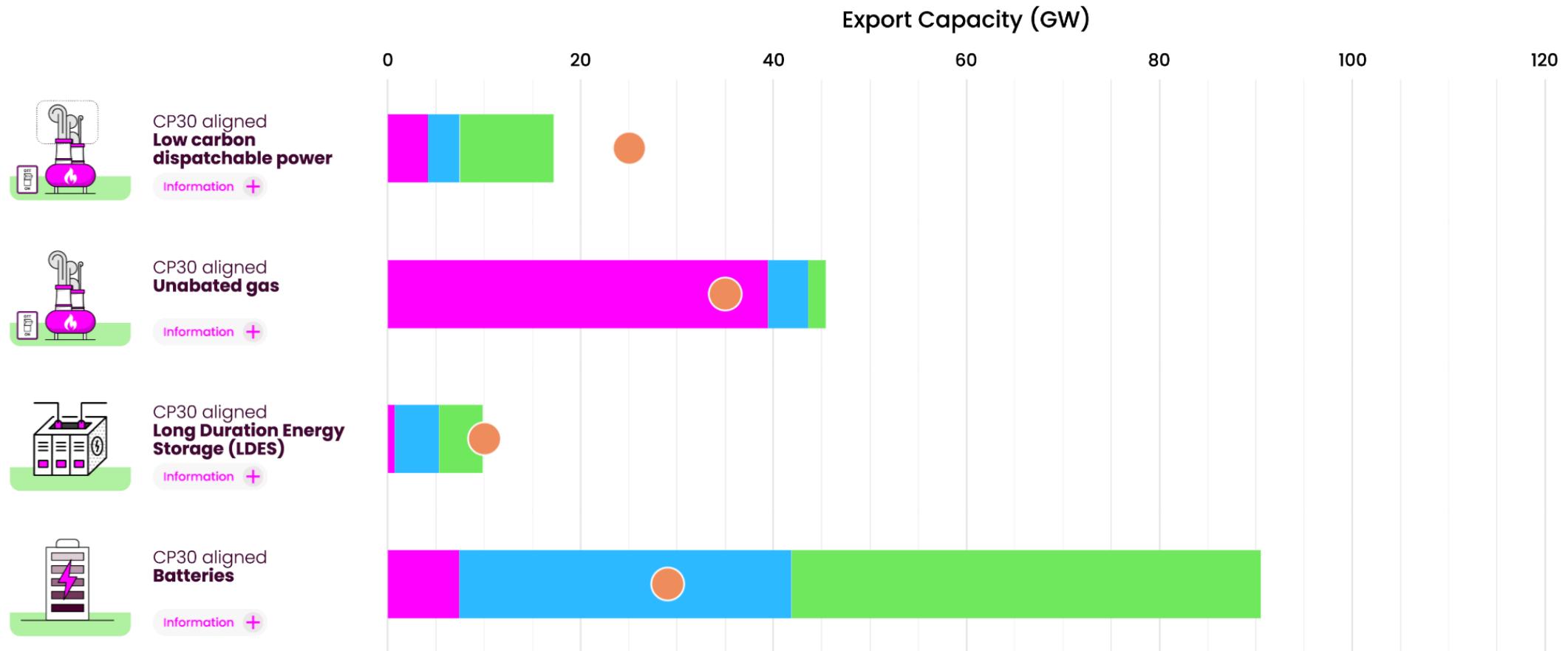
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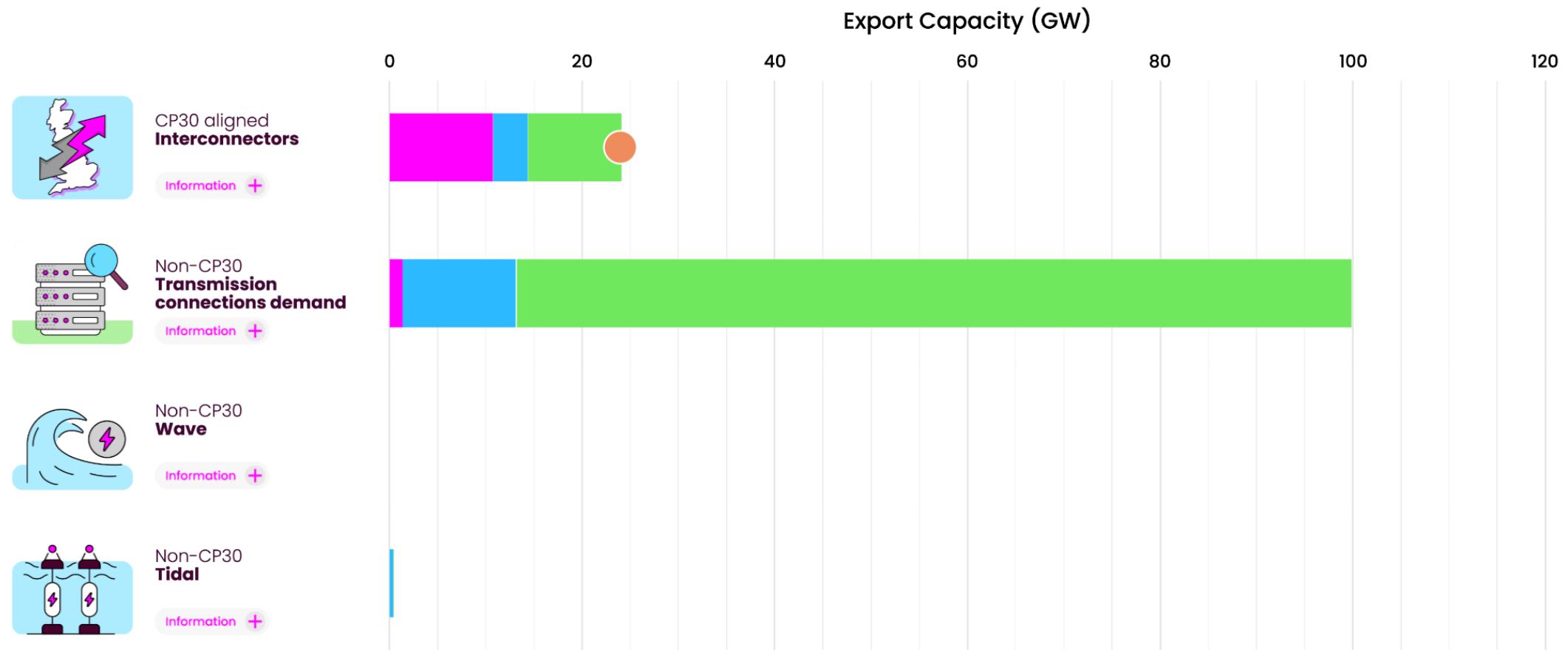
# Further Technologies 1 of 4



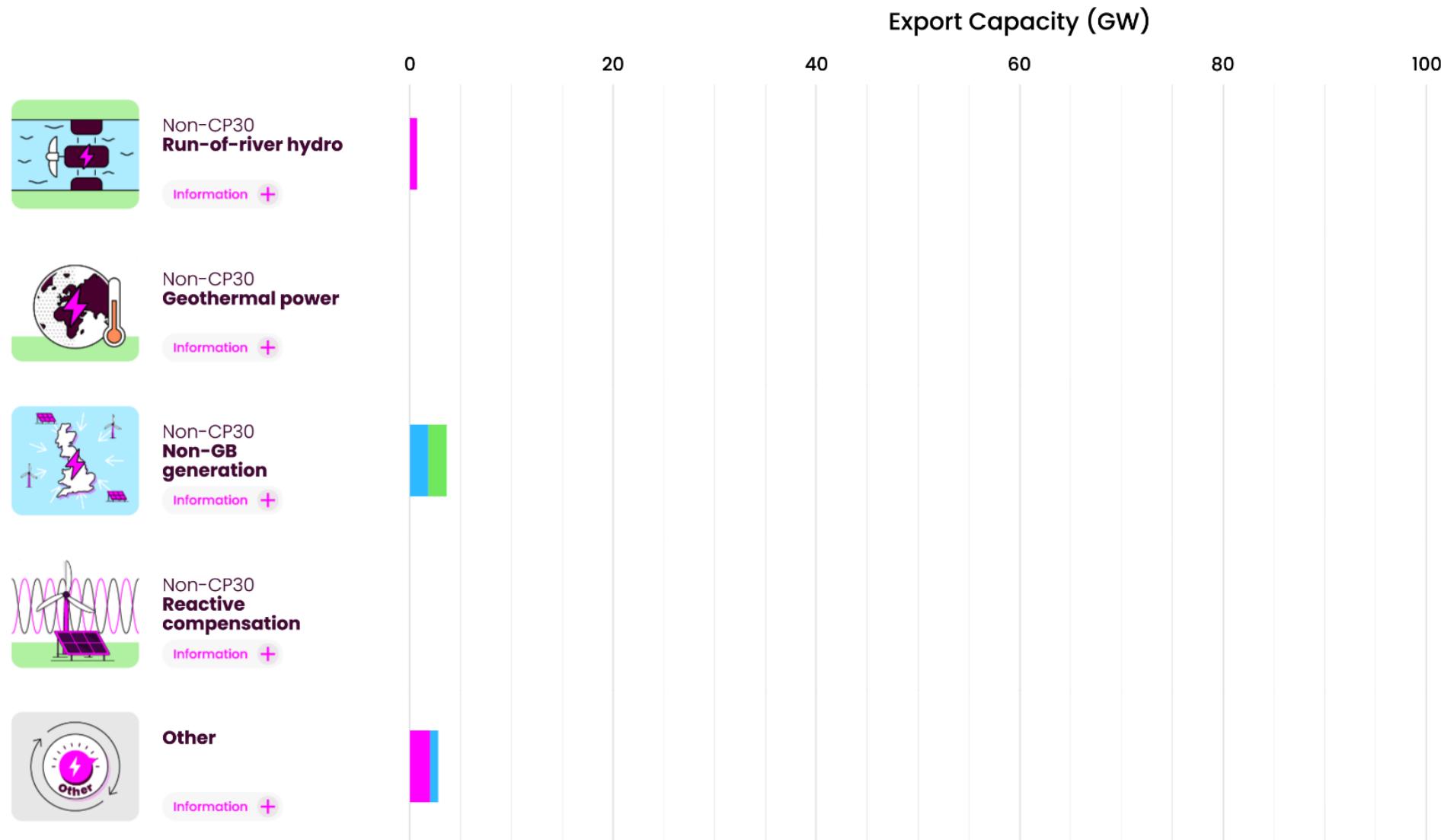
# Further Technologies 2 of 4



# Further Technologies 3 of 4



# Further Technologies 4 of 4



# Projects not prioritised

In total 217 GW of projects which were ready were not prioritised as they were not strategically aligned

Technology	Capacity	Reason for remaining projects not being prioritised
Battery	153 GW	Protected projects took priority
Interconnector	1.2 GW	Projects with Cap and Floor took priority
LDES	5.6 GW	Projects which applied earlier took priority
Offshore Wind	4.5 GW	More ready projects took priority
Onshore Wind	13.4 GW	Protected projects took priority
Solar	35.9 GW	Projects which applied earlier took priority
Unabated Gas	3.8 GW	Only protected projects could be prioritised

Some hybrid/co-located projects will have some of their technologies prioritised and some of their technologies not prioritised in line with the methodology

# What's Next?

Understanding your  
notification & next steps

# Our new handbook

## New handbook covering:

- What connections reform set out to do
- How to understand your notification
- What to do when you get your offer or ATV
- Fees and securities information
- Information for co-located and hybrid projects
- More information on the enquiries process



# Understanding the offer table

For those who applied directly to NESO

Stage	TEC	Refined Technology Type	Strategic Alignment Category	Protected Status	Installed Capacity	Gate	Phase	Detailed Checks Status
<Stage 1>	<xxMW>	<Technology>	<Category>	<Y/N>	<xxMW>	<2>	<2>	<Met criteria for detailed checks>
<Stage 2>	<xxMW>	<Technology>	<Category>	<Y/N>	<xxMW>	<2>	<1>	<Subject to detailed checks>
<Stage 3>	<xxMW>	<Technology>	<Category>	<Y/N>	<xxMW>	<1>	<n/a>	<n/a>

## Gate 2 Met Criteria for Detailed Checks:

Your project has met the readiness and strategic alignment criteria. You will receive a Gate 2 Modification Offer soon.

## Gate 2 Subject to Detailed Checks:

Your project must complete further checks before an offer can be made. We will contact you with the outcome.

## Gate 1:

Your project did not meet the strategic alignment criteria at this point. You will receive a Gate 1 Agreement to Vary (ATV), but you can apply again in future windows.



If you see the same technology and stage listed more than once, this may indicate that your project is partially protected or that you have accepted a 'split offer' to progress part of your application through Gate 2. You will already be aware of these details if this applies to you.

# All aspects of the results table

## Stage:

The part of your project being assessed.

## Installed Capacity:

The intended maximum amount of Active Power that the Developer's Equipment would be capable of exporting and/or importing as entered by the customer within the G2TWQ process.

## Transmission Entry Capacity (TEC):

Stage TEC found within a customer's existing agreement or reduced stage TEC, if requested within the G2TWQ process. If you are a demand-only customer, the TEC capacity will be intentionally shown as 0.

## Gate:

Whether your project is at Gate 1 (not yet ready or needed) or Gate 2, (the new project pipeline)

## Refined Technology Type:

This is the technology which has been derived from your original contracted technology based on the information you have provided within your Gate 2 Application.

## Phase:

This relates to the CP30 phase allocation, i.e. Phase 1 (2026-2030) or Phase 2 (2031-2035). This does not necessarily mean that the connection date offered will always be within these dates. The phase relates to 'firm' or 'enduring non-firm' connection date.

## Strategic Alignment Category:

This is the Clean Power 2030 Action Plan (CP30) category that your refined technology type belongs to for queue formation.

## Detailed Check Status:

Whether your project has met all detailed checks or is subject to them as still going through the process. The detailed check process runs in parallel with the queue formation process that has determined your results. If you have not yet passed all the detailed checks, we will be in touch with you to provide extra information. Current data shows us that failing detailed checks is rare, but if you do not pass them, you will receive a Gate 1 ATV.

## Protected Status:

Whether your project has protected status. Protected status means a project has been given priority to keep its original connection date despite the old queue being restructured.

# What to do when you get your offer or ATV

Offers and ATVs will be issued between December 2025 and mid 2026

## Gate 1 offers (Agreement to Vary – ATV)

If you receive a Gate 1 ATV, you will need to sign it within 4 weeks.

Once your signed ATV is received, NESO will arrange for the return of your securities within 6 weeks.

Bank details will now be validated at the same time as offers.

## Gate 2 offers (Gate 2 Modification Offer)

If you receive a Gate 2 Modification Offer, you will need to sign it within 90 days.

You will then need to place your securities within 30 days of signing.

# Enquiries about your outcome

NESO support available

# Here to provide the right support

## Outcome enquiries

For **specific queries or clarification requests** on your project outcome, not addressed in the handbook or information available already

## Outcome Challenges

For **evidence based data or process administration error** challenges perceived to have had an impact on a specific outcome

## Formal dispute routes

Existing formal dispute routes available if unhappy with NESO's final response (*will not expedite a response*)

# Raising & Managing contacts via the portal

1

Use the connections portal to raise your contact using the dedicated category

2

Provide a concise summary of your questions and expectations using the fields

3

Upload relevant data or documentation evidence to support your



## Using your feedback to improve:

- + Upload up to 99 MB per file (up to 20 files)
- + Option to update case information throughout
- + All case information visible in one place
- + Dedicated team of resource supporting contacts
- + Continued support for all non outcome questions

# Helping us to support you



Please **only use the portal** to raise requests for support



Individual case initial response within in **2 working days** wherever possible



Where **no clear evidence** provided, we **cannot proceed**



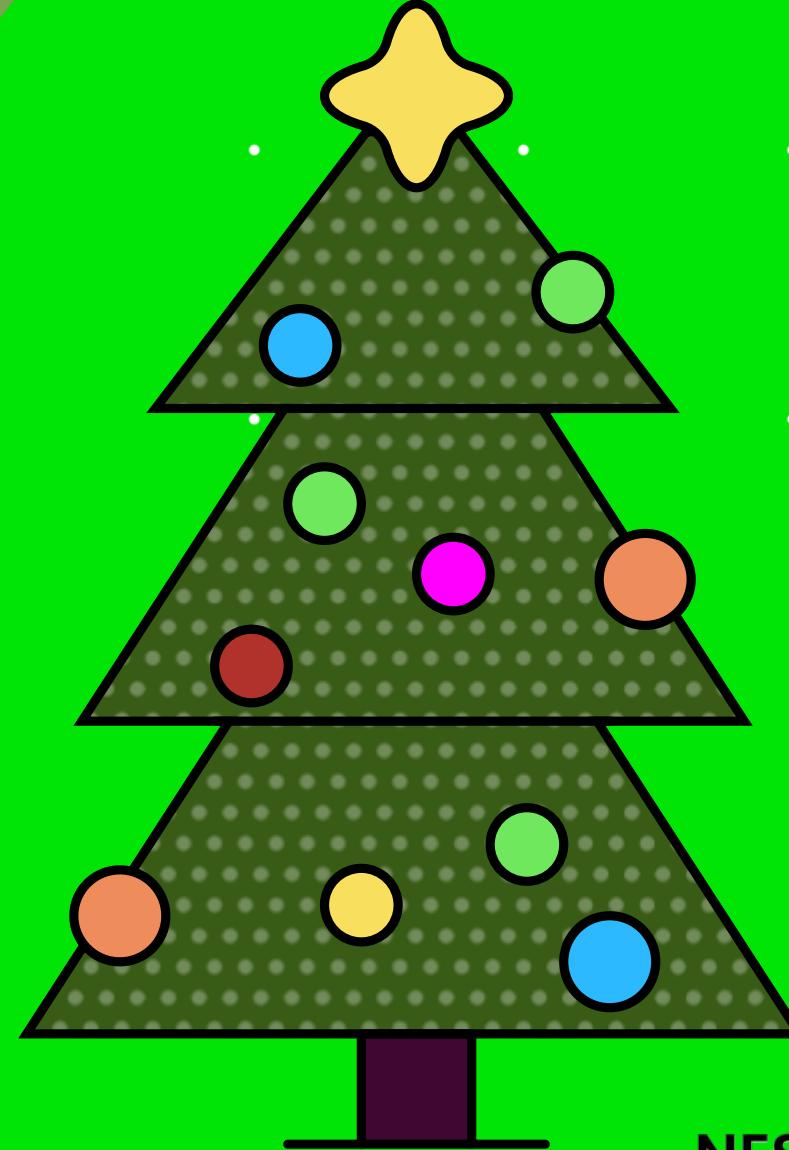
**Limited remediation** options possible



# Seasonal period

We will not expect customers  
to take any action between  
**Friday 19 December** and  
**Sunday 4 January**

**Our channels will remain open for incoming  
messages**



# Slido Q&A

We will now open the Slido Q&A for the remainder of the session.

**#NESO0812**



**We kindly request that you do not raise project-specific questions, and that you keep your questions constructive and relevant to the content we have shared today.**



# Thank you