

Connections Reform update

Webinar

22 January 2026

Welcome

Kate Garratt

Agenda

1. Welcome and housekeeping
2. Timeline and offers update
3. Correction on solar data
4. Customer query insights following queue formation
5. Detailed Checks update
6. Finance update
7. New results report
8. Website improvements
9. Q&A

Q&A

Today's Q&A is open

Slido: NESO2201

We are moderating questions to ensure they are:

- not project specific
- not repeats of questions asked by others
- respectful and pertinent



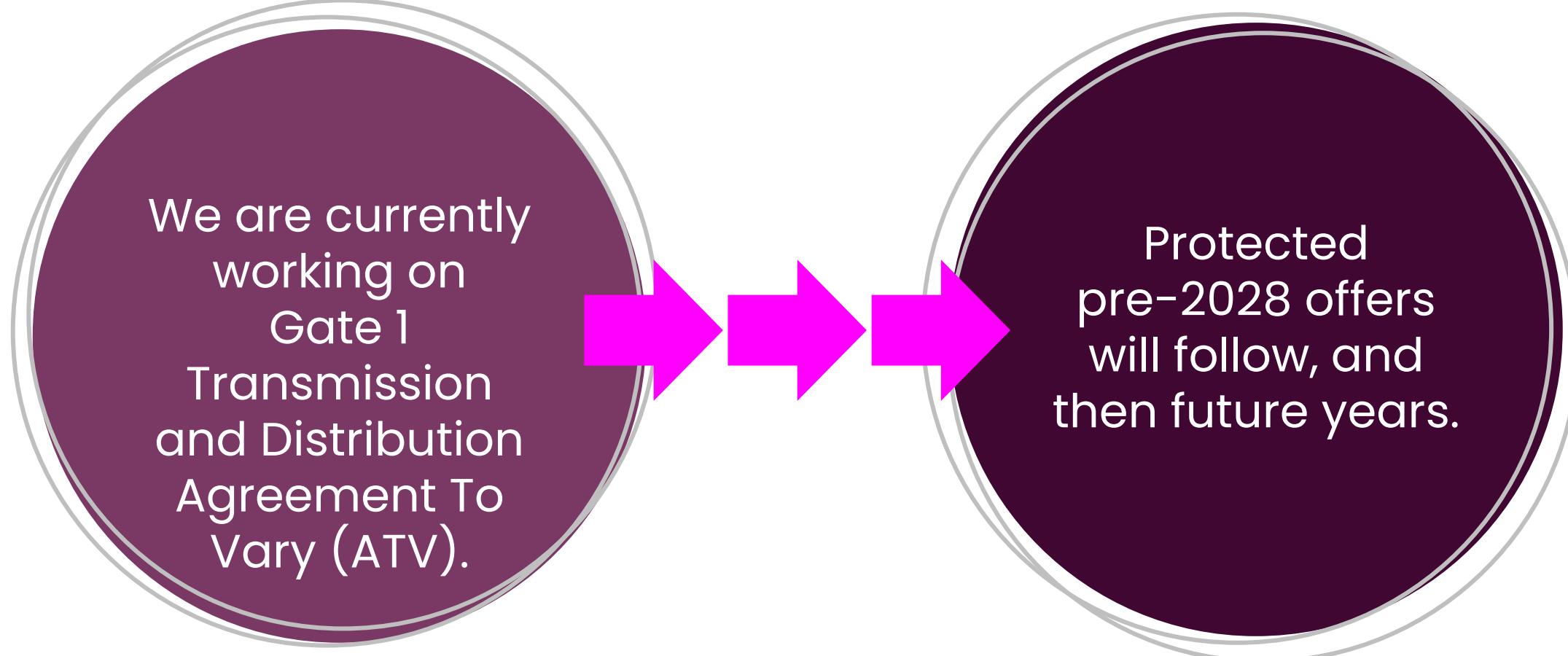
Timeline and offers update

James Norman

Setting the timing for the next window



Offer timelines



We are currently working on Gate 1 Transmission and Distribution Agreement To Vary (ATV).

Protected pre-2028 offers will follow, and then future years.

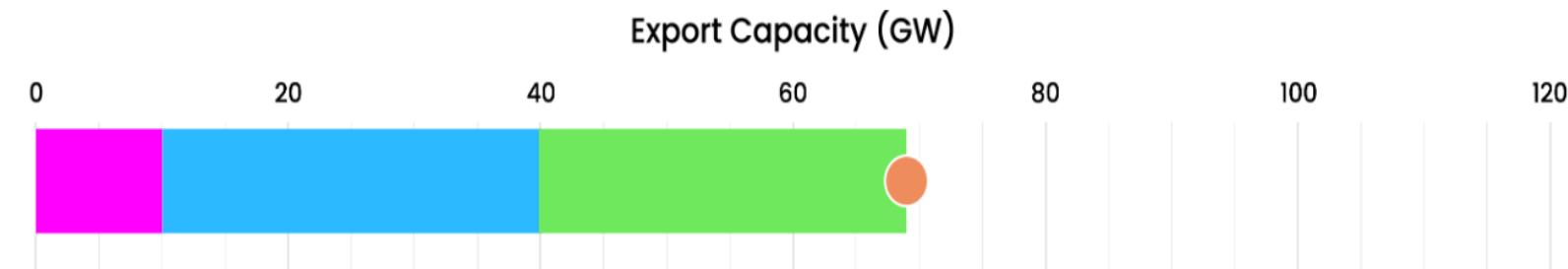
Solar zonal information

James Norman

Solar - correction

Most zones were undersupplied in Phase 1.

Most zones were oversupplied in Phase 2. Remaining capacity is available in zones ~~T3, T8, T9~~ T4, T5 and T10.



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

- Total amount planned**
(2035 permitted capacity from Clean Power Action Plan)
- Total already built** (Built Capacity)
- Total Prioritised for 2030 (Phase 1)**
- Total Prioritised for 2035 (Phase 2)**

Customer queries

Jamie Webb

Helping us to support you



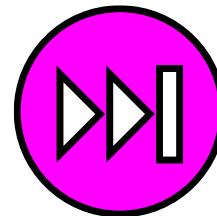
Please **only use the Portal** to raise requests for support



Initial responses to individual cases within **2 working days** wherever possible



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



Limited remediation options possible



NESO enquiries



DNO enquiries

Queries following outcome notifications

On 8 December, NESO notified customers of individual project outcomes, including Gate, Phase and Detailed Check status.

35% of approx. 1,000 inbound queries through the Connections Portal were related to the notifications in the 4 weeks that followed.

98% cases responded to by NESO within 48 hours, related to Queue Formation notifications, except those received over the Christmas period.

The majority of questions related to process and methodology queries.

This slide relates to outcome notification queries only, not offers, DRC, queue milestone queries etc.

45 related to queries or challenges on individual customer results.

- Key themes:
 - How to read TEC data on notification
 - Challenges on protection decisions
 - Signing dates checks

Customer queries

Detailed Checks

Detailed Checks update

All applications have undergone detailed checks.



Gate 2 projects requiring further clarification have been contacted.

If we have any outstanding questions regarding the resubmission evidence we received, we will contact you by phone or email.

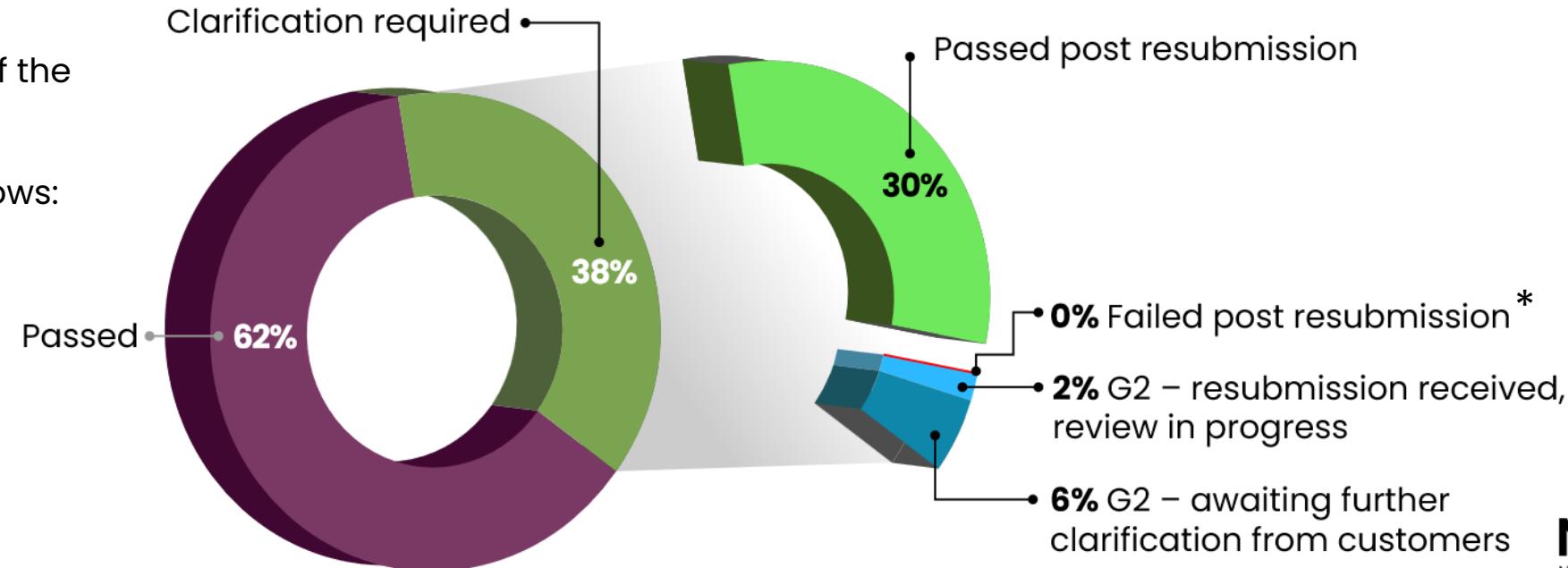


If we have received your resubmission evidence, completed our assessment and confirmed the outcomes of your detailed check, you will have already received confirmation comms.



Key stats

The breakdown of the Detailed Checks status for Gate 2 projects is as follows:



Finance update

Nina Bhogal

CMP 448

Future impacts to securities

- The Progression Commitment Fee (PCF) supports Connections Reform by encouraging committed projects to remain in the queue and incentivising unviable projects to exit early.
- The PCF was implemented into the CUSC on **02/01/2026**.
- The first time NESO will need to publish the metric (cumulative total MW terminated as a result of projects failing to meet Queue Management Milestone 1) will be on **03/08/2026**.



Securities for the PCF will only be applied if a cumulative threshold of 6.5 GW of generation is terminated from the queue for failing to meet M1, and NESO, with ultimate approval from Ofgem, decides to activate them.

Securities freeze

Update for NESO customers (iDNO and DNOs will reach out to their customers separately)

- We have received a Letter of Comfort from Ofgem to support a freeze of the bi-annual securities process from 1 April to 30 September 2026.
- As a result, we have not issued any new securities updates this month.
- For customers with a connection agreement with a DNO or iDNO, updates will be provided by the relevant organisations.



A temporary pause helps to avoid unnecessary duplication, particularly as Gate 1 and Gate 2 offers will update security obligations later in 2026.

This is in response to customer feedback and:

- avoids two rounds of securities updates in rapid succession
- Supports a smoother transition to the new Connections Reform methodology
- aligns securities requirements with upcoming offers

What you need to do

Actions for customers



Cash in Escrow

No action if NESO already holds the required amount.



Letter of Credit

Check and update validity as needed.



Parent Company Guarantee

Check and update validity as needed.
Send any updated LoCs/PCGs to NESO by 14 February 2026.

New data report

Kate Garratt

Detailed results

Table 2: Phase 1 MW volumes for battery, onshore wind and solar by Distribution zone – final and zonal totals

Phase 1 (Phase 1 Zones)	D1	D2	D3	D4	D5	D6	D7	D8	Grand Total
 Battery	1,919.3	1,390.2	737.5	980.6	65.0	2,551.5	818.3	1,773.5	10,235.9
 Onshore Wind	1,487.6	892.8	10.2	-	346.7	1,588.0	-	6.2	4,331.5
 Solar	984.7	1,154.9	338.8	2,129.7	252.1	6,456.3	1,846.3	3,084.6	16,247.4
Grand total	4,391.6	3,437.9	1,086.5	3,110.3	663.8	10,595.8	2,664.6	4,864.3	30,814.8



Table 22: Phase 2 MW permitted capacity remaining for onshore wind in England and Wales, and Scotland, for future Gated Application Windows

Technology	England and Wales	Scotland	Grand Total
 Onshore Wind	5100.7	0.0	5100.7

Table 8: Gate 1 MW volumes by reason for Gate 1 outcome

Reason for Gate One	Capacity (GW)
Self-elected Gate 1	205.7
Failed readiness	4.5
Failed strategic alignment	217.3
Did not apply	127.3
Grand total	554.8

Website improvements

Kate Garratt

Finding information quickly

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Clearing the gridlock: connecting Britain

We've re-ordered and published the new connections delivery pipeline, ending years of gridlock by prioritising ready-to-go projects that can drive economic growth and deliver a secure energy system across GB. Our reforms, designed through a comprehensive programme of engagement and approved by the regulator, can clear the backlog, unlock billions in investment, and pave the way to a sustainable energy future.

On this page, you'll find:

- The full pipeline results
- Videos and insights from industry leaders
- Essential information for customers and developers in a new handbook

Together, we're clearing the gridlock and connecting Great Britain.

Connections Reform: A Root and branch transformation

• **Clearing the Gridlock:** We've unlocked 381.5GW of capacity that's ready-to-build, paving the way for Britain's clean energy future and fuelling economic growth across Great Britain.

• **Certainty, not Delay:** Prioritising shovel-ready projects aligned with national energy targets, giving certainty to our customers, developers and investors clarity.

• **Driving Investment:** Unlocking up to £40bn of annual energy investment, creating jobs, supercharging supply chains and enabling tomorrow's technologies.



IN PROGRESS: Customer information page

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Connections Reform Results

Unlocking investment. Connecting Britain.



Great Britain's New Connections Pipeline: Results at a Glance

Great Britain's energy system has turned a corner. For years, outdated rules left projects stuck in a queue that had grown to over 700GW, four times what's needed by 2030. Now, that era ends. NESO, working with government, Ofgem and industry, has delivered a re-ordered pipeline that prioritises shovel-ready projects and future needs like solar farms, data centres, and EV superhubs.

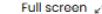
This page gives you the detail behind the reform:

- Permitted capacity by technology type
- Overview of old and new connections queue make up
- High level information of Solar, Batteries and Onshore wind results by region

Over 700GW in the old Queue – Great Britain Stuck in Gridlock

The old system left shovel-ready projects waiting for up to 10 years. The queue grew to **four times what's needed by 2030**, creating uncertainty and slowing investment.

This is the backlog we've cleared to unlock Great Britain's clean energy future.



Great Britain Stuck in Gridlock

Export Capacity (GW)

Technology	Capacity (GW)
Storage	230
Solar	200

What do you access regularly?



Q&A

NESO

Slido Q&A

We will now answer the top voted Slido Q&As for the remainder of the session.

#NESO2201



We kindly request that do 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