Public

Demand Call for Input (CFI)

High Level Summary

March 2026

NESO
National Energy
System Operator

Exec Summary

Call for Input - Overview

- On 6 November 2025, NESO issued a Call for Input (CFI) to all customers with existing transmission-level demand connection agreements, as well as those with directly connected generation agreements that include demand technologies.
- The CFI gathered structured evidence to support NESO's ongoing work with Ofgem and Government on reforming the demand connections queue, ensuring that decisions are based on accurate, up-to-date data about the queue.
- This document provides industry with high-level insight into the responses received.

High-Level Insights

Strong Appetite for Flexibility: 81% of projects are open to alternative connection arrangements such as phased, ramped, or non-firm connections, if this facilitated an earlier connection date

Connection Dates: Connection dates typically range from 2027–2035, with very strong pressure to achieve pre-2030 energisation for around 40% of projects

Data Centres Dominate: Data centres make up over half of responses, both in terms of volume and capacity

Off-taker Status is Mixed: Only 32% of data centre projects have secured off-takers, while 68% have not yet secured one, often pending a firm grid connection date or with negotiations under way.

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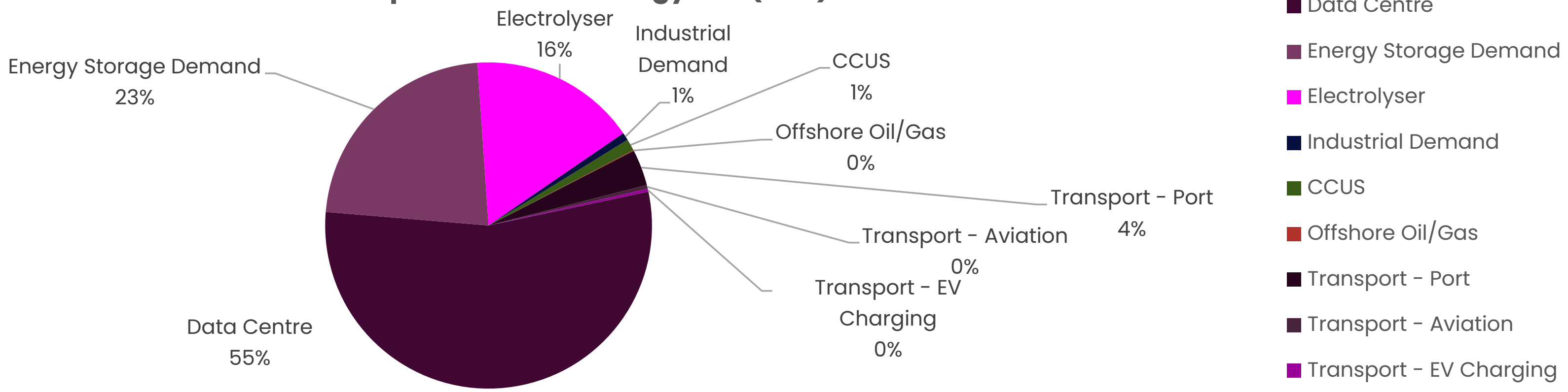
Demand Call for Input – High Level Summary

The NESO Demand CFI received 243* responses representing over 90GW of demand capability. The overall response rate by demand is heavily weighted towards Gate 2, indicating that the most significant capacity is associated with more mature projects.

Data centres are the dominant technology, accounting for the largest share of both project count and total demand (MW), followed by energy storage and electrolysers.

CFI Responses - Technology Mix (MW)



Technology	Demand (MW)
Data Centre	50,802
Energy Storage Demand**	20,997
Electrolyser	15,357
Industrial Demand	710
CCUS	1,078
Offshore Oil/Gas	65
Transport - Port	3,328
Transport - Aviation	350
Transport - EV Charging	260
Grand Total	92,947

Technology	Project Phases***
Data Centre	152
Energy Storage Demand	71
Electrolyser	29
Industrial Demand	12
CCUS	4
Offshore Oil/Gas	1
Transport - Port	5
Transport - Aviation	1
Transport - EV Charging	4
Grand Total	279

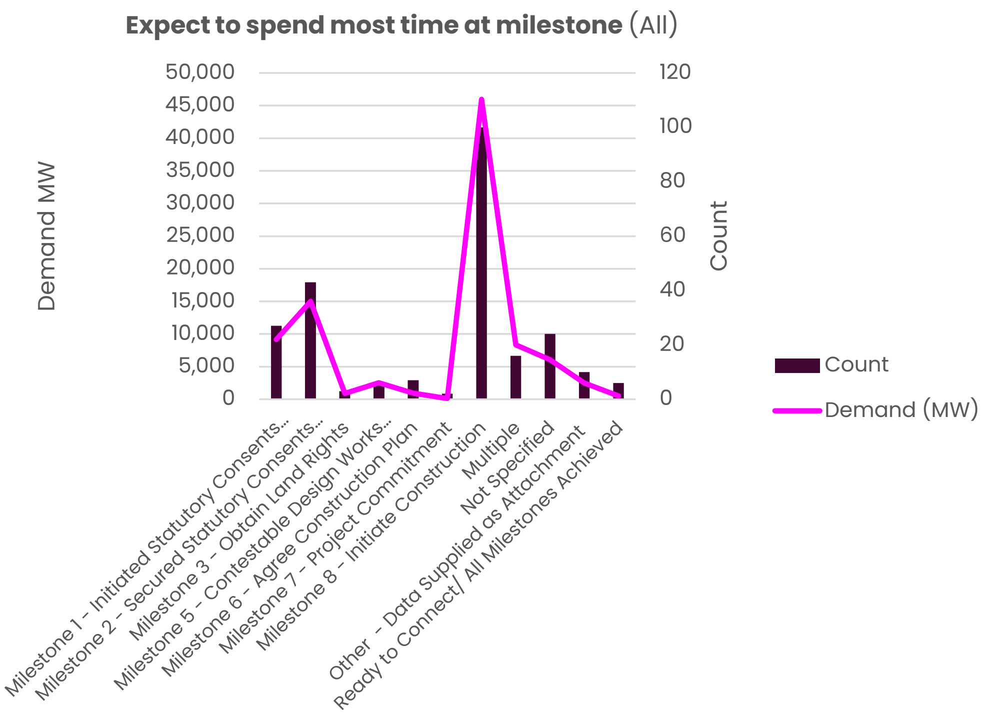
**243 responses represents the full scope of CFI responses, including those that were unable to be linked to internal datasets for full analysis. Excluding the unlinked projects gives a total 229 responses.*
***The Call for Input returned a considerable response rate for projects that identified as Energy Storage Demand. However, for the purpose of Connections Reform and the Gate 2 To Whole Queue (G2TWQ) exercise, Storage (including Long Duration Energy Storage (LDES) and Pumped Storage Hydro) technology types are treated as separate from the Demand Queue.*
**** 279 project phases represent CFI responses that have been broken down by technology/ phase (based on connection dates per phase). A single project may have more than one phase.*

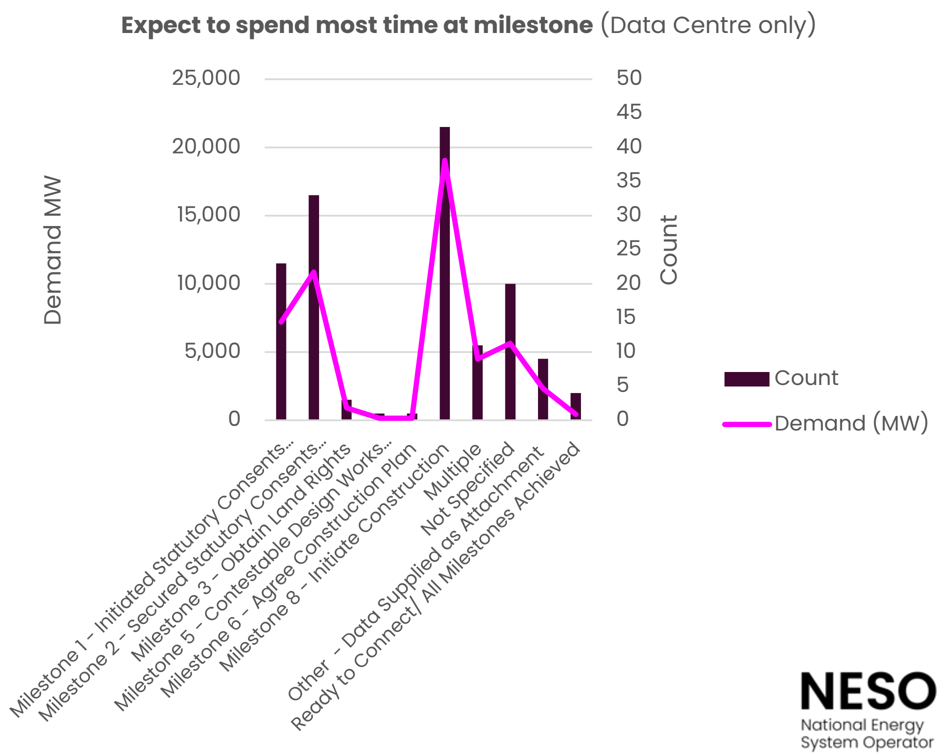
Demand Call for Input – High Level Summary

Milestone Progression

The CFI results indicate most respondents expect to spend the longest time at the construction initiation stage (M8). A smaller but notable proportion anticipate the longest duration occurring during the initial planning and statutory consent phases(M1-M2). Very few respondents identify the intermediate milestones as the point where they expect to spend most time(M3-M7).

Some responses reference multiple milestones or provide no specific milestone but this does not alter the response distribution. Overall, the responses are concentrated at the earliest and latest stages of the process.





Demand Call for Input – High Level Summary

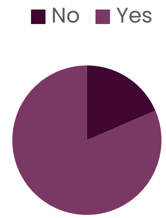
Other Response Insights

Most projects indicate they would accept an alternative connection agreement, which suggests broad openness to phased, non-firm or otherwise adjusted arrangements if this results in earlier connection dates.

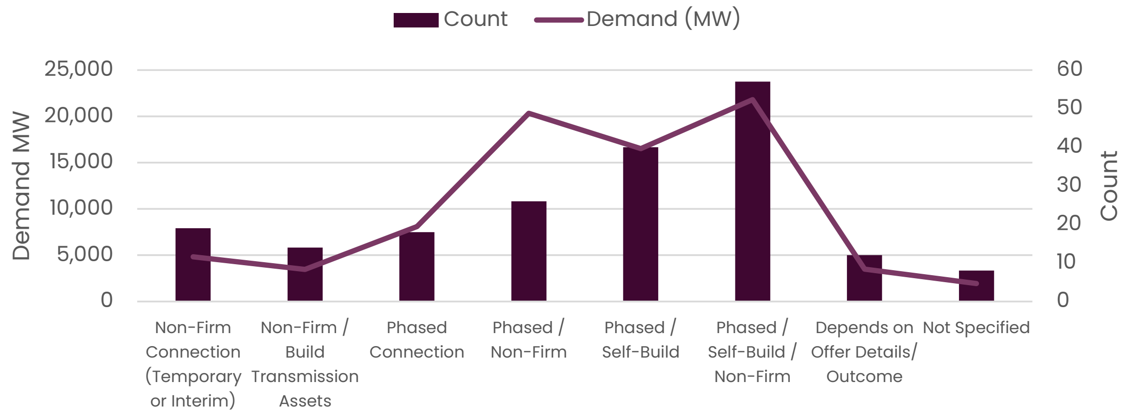
Most projects have not yet secured full or outline planning permission, although a notable proportion have applications underway or approved.

A significant majority of projects report having reached financial commitment with evidence, representing most of the associated demand.

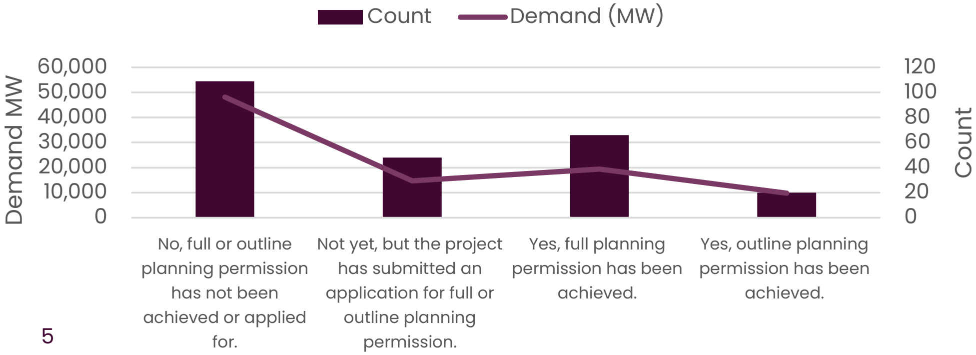
Would you accept an alternative connection agreement e.g. phased, non-firm etc. for an expedited connection date?



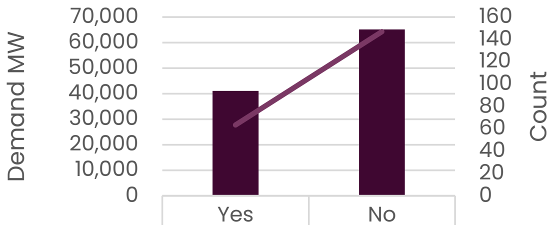
Details of alternative connection agreements under consideration



Has the project achieved Full or Outline Planning Permission? (All)

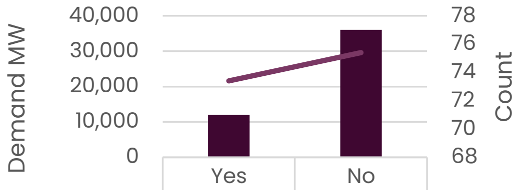


Project has received Financial Commitment with FID Evidence? (All)



	Yes	No
Count	94	149
Demand (MW)	27,726	64,274

Project has received Financial Commitment with FID Evidence? (Data Centre only)



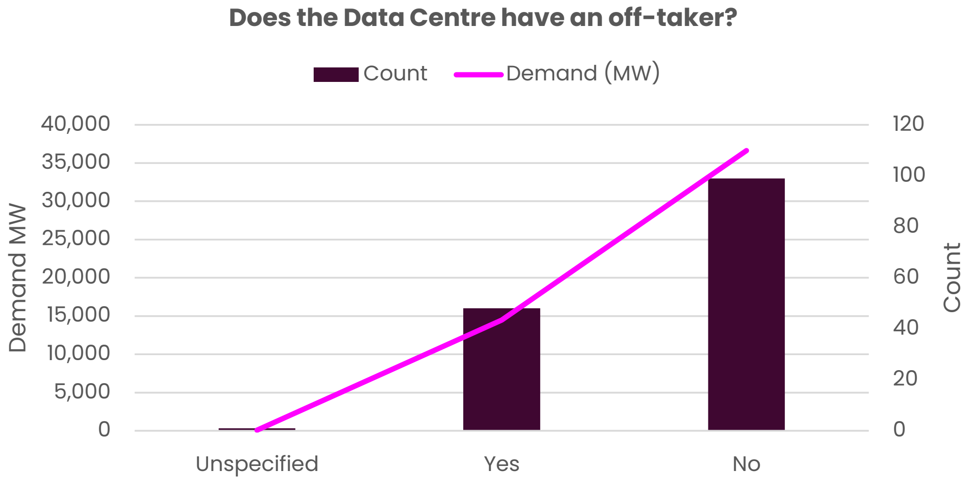
	Yes	No
Count	71	77
Demand (MW)	21,598	29,590

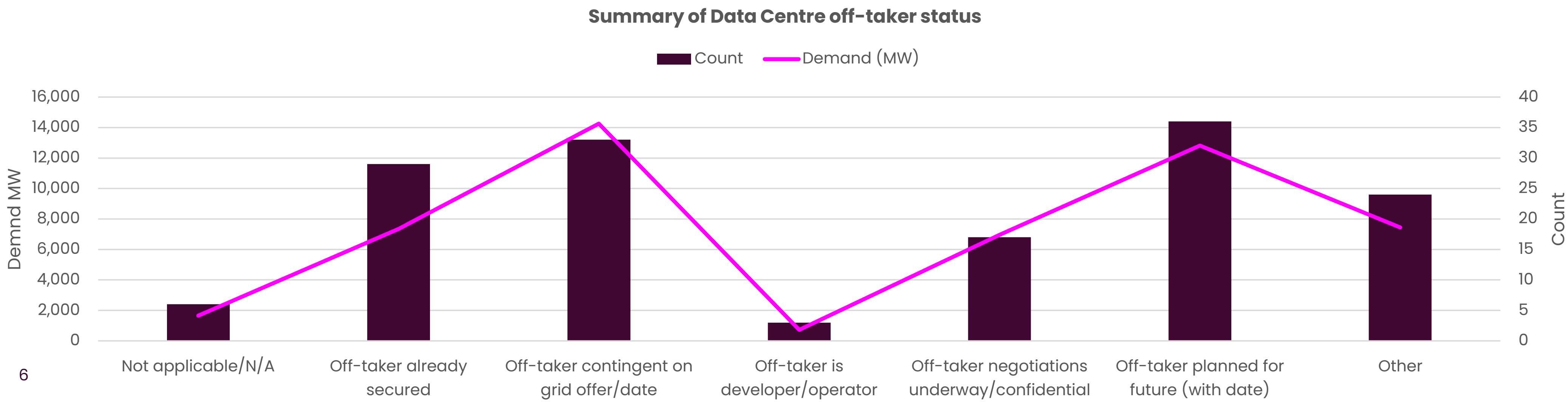
Demand Call for Input – High Level Summary

Data Centre Insights

Data centres were the clear driver in this CFI, constituting the majority of both project count and total demand. These projects span a range of types, including hyperscale, cloud, and co-location facilities and represent the largest, fastest growing segment in the queue.

Notably, while some data centre projects already have off-takers secured or in negotiation, many are contingent on receiving a firm connection date demonstrating that timely grid offers are essential to unlocking further investment and delivery.





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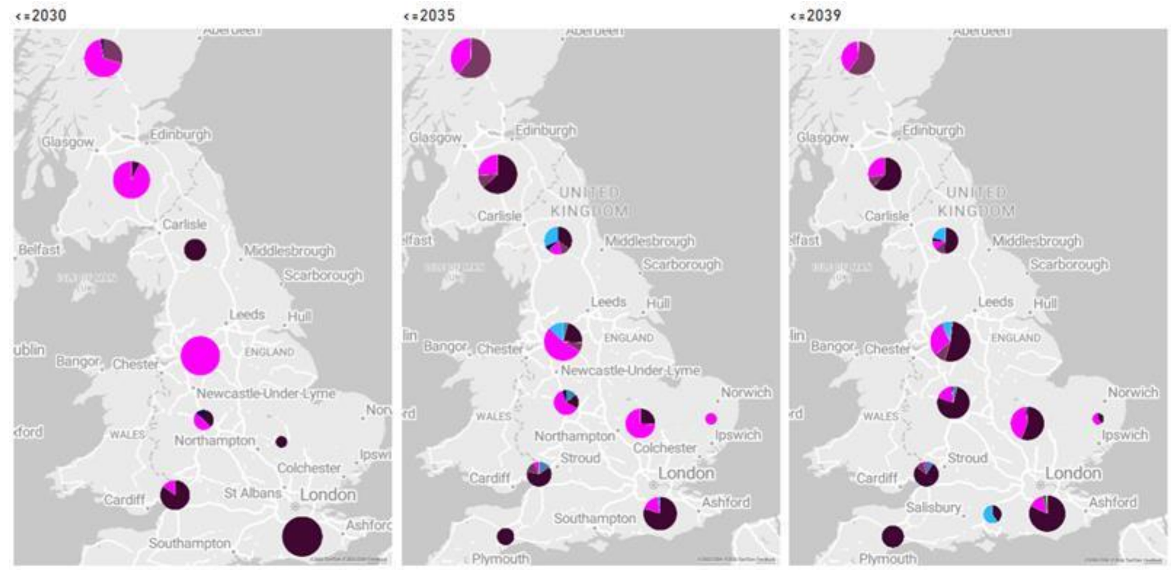
Demand Call for Input – High Level Summary

CFI Demand Capacities (MW) by Area & Technology

T-Zone & Area (Linked)	CCUS	Data Centre	Electrolyser	Energy Storage Demand	Industrial Demand	Offshore Electrification	Transport - Aviation	Transport - EV Charging	Transport - Port	Total
****		6,748	6,745	2,127	50	65		260	168	**16,163**
T1: N Scotland	53		5,320	3,470	50					**8,893**
T2: C & S Scotland		5,803	947	2,708						**9,458**
T3: N England		2,400	550	505	200				1,000	**4,655**
T4: N Wales, Mer. & Hum.	300	7,860	1,345	4,270	120				1,030	**14,925**
T5: Midlands	350	6,441		1,570	140					**8,501**
T6: C England		5,151		3,906	150					**9,207**
T7: E Anglia		400		650						**1,050**
T8: S Wales & Sev.	375	3,165	450	158						**4,148**
T9: SW England		2,750								**2,750**
T10: S England		685							1,030	**1,715**
T11: SE England		9,399		1,634			350		100	**11,483**
Total	**1,078**	**50,802**	**15,357**	**20,997**	**710**	**65**	**350**	**260**	**3,328**	**92,947**

CFI Demand Capacities (MW) by Technology & Year Bands

Technology	<=2030	2031 - 2035	2036 - 2040	Total
CCUS		1,078		**1,078**
Data Centre	4,626	14,111	32,065	**50,802**
Electrolyser	610	13,527	1,220	**15,357**
Energy Storage Demand	5,866	12,966	2,165	**20,997**
Industrial Demand	90	350	270	**710**
Offshore Electrification			65	**65**
Transport - Aviation			350	**350**
Transport - EV Charging			260	**260**
Transport - Port		2,130	1,198	**3,328**
Total	**11,192**	**44,163**	**37,593**	**92,947**



Technology ● CCUS ● Data Centre ● Electrolyser ● Energy Storage Demand ● Industrial Demand ● Transport - Aviation ● Transport - Port

Geographic Insights *****

Geospatial plots show that demand is spread across the UK but with clear clusters around major urban and industrial locations, particularly in Scotland, the Midlands, and the South East.

The highest levels of CFI demand are concentrated in T4 England & Wales, T11 England, and T2 Scotland, with data centres making up a large share of the totals in several zones.

Data centre demand dominates the overall picture, forming the largest single technology category across all areas and years.

Electrification, energy storage, and industrial demand appear at lower but still material levels, with variation depending on region.

NESO
National Energy System Operator

****There are c.16GW of CFI responses with insufficient data to link to a systemised Connections Projects record. Therefore, this capacity is not liked to a Transmission Zone

*****The zonal boundaries above align with the zonal map used in the Connections Reform Detailed Results Data – January 2026

End of Slides

NESO Connections

These CFI insights should be considered indicative only. They represent developer intent, not confirmed deliverability. NESO will need to integrate these findings with existing connection data sets to validate their accuracy before forming policy conclusions.