# Initial TNUoS Tariffs for 2027/28 - Webinar

NESO Revenue Team

May 2026

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# Agenda

1. Introduction
2. Tariff timetable
3. TNUoS Tariffs Uncertainties
4. Key inputs & findings
5. Revenue
6. Generation tariffs
7. Local Tariffs
8. Demand tariffs
9. Next Steps
10. Q&A

# Tariff Forecasting & Setting Team

## Nick Everitt

Forecasting and setting TNUoS to recover around £9bn of revenue per year from generators and demand; in addition to BSUoS Forecasting and tariff setting and AAHEDC tariff setting.

### Sarah Chleboun

- Overall TNUoS tariff setting
- Offshore revenue & local tariffs
- Local substation
- Networks /Generation
- Onshore Local Circuits
- ALFs

### Alan Fradley

- Networks /Generation
- Onshore Local Circuits
- Local substation
- AAHEDC

### Priya Chigullapalli

- Networks /Generation
- Revenue

### Tobi Odusanya

- Networks /Generation
- ALFs

### Dan Hickman

- Change Lead
- TDR
- Demand
- EET
- ALFs
- AAHEDC

### Nicky White

- Change
- TDR
- Offshore revenue & local tariffs

### Katie Clark

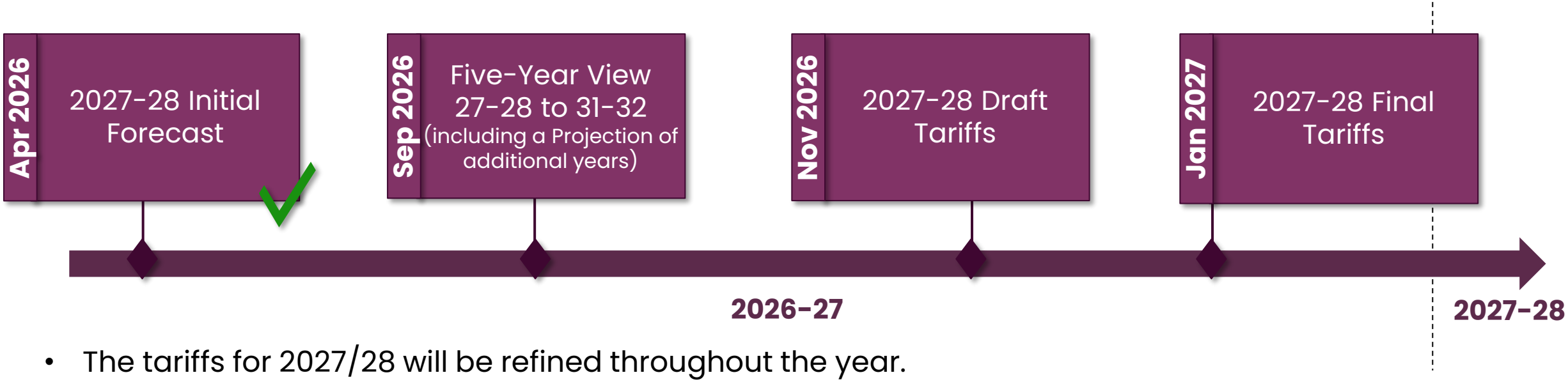
- Revenue
- Demand Charging Base
- Networks /Generation
- BSUoS Forecasting
- BSUoS Tariff Setting

### Edward Adofo

- BSUoS Forecasting
- BSUoS Tariff Setting
- Offshore revenue & local tariffs

# Tariff Timetable

NESO has a licence and CUSC obligation to publish quarterly TNUoS forecasts and a Five-Year View annually, to enable market participants to make efficient operational and investment decisions.




- The tariffs for 2027/28 will be refined throughout the year.
- Final Tariffs for 2027/28 will be published by 31st January 2027 and will take effect from 1st April 2027.

# TNUoS Forecast Changes & Uncertainties

This slide contains details of any regulatory changes or uncertainties which we have taken into account in the setting of tariffs for 2027/28.

## Regulatory Uncertainties

Substantial change is expected to charging methodology Reform of National Pricing program. These are not taken into account in this forecast, we have assumed the continuation of the current methodology until the outcomes of any required CUSC modifications are known.

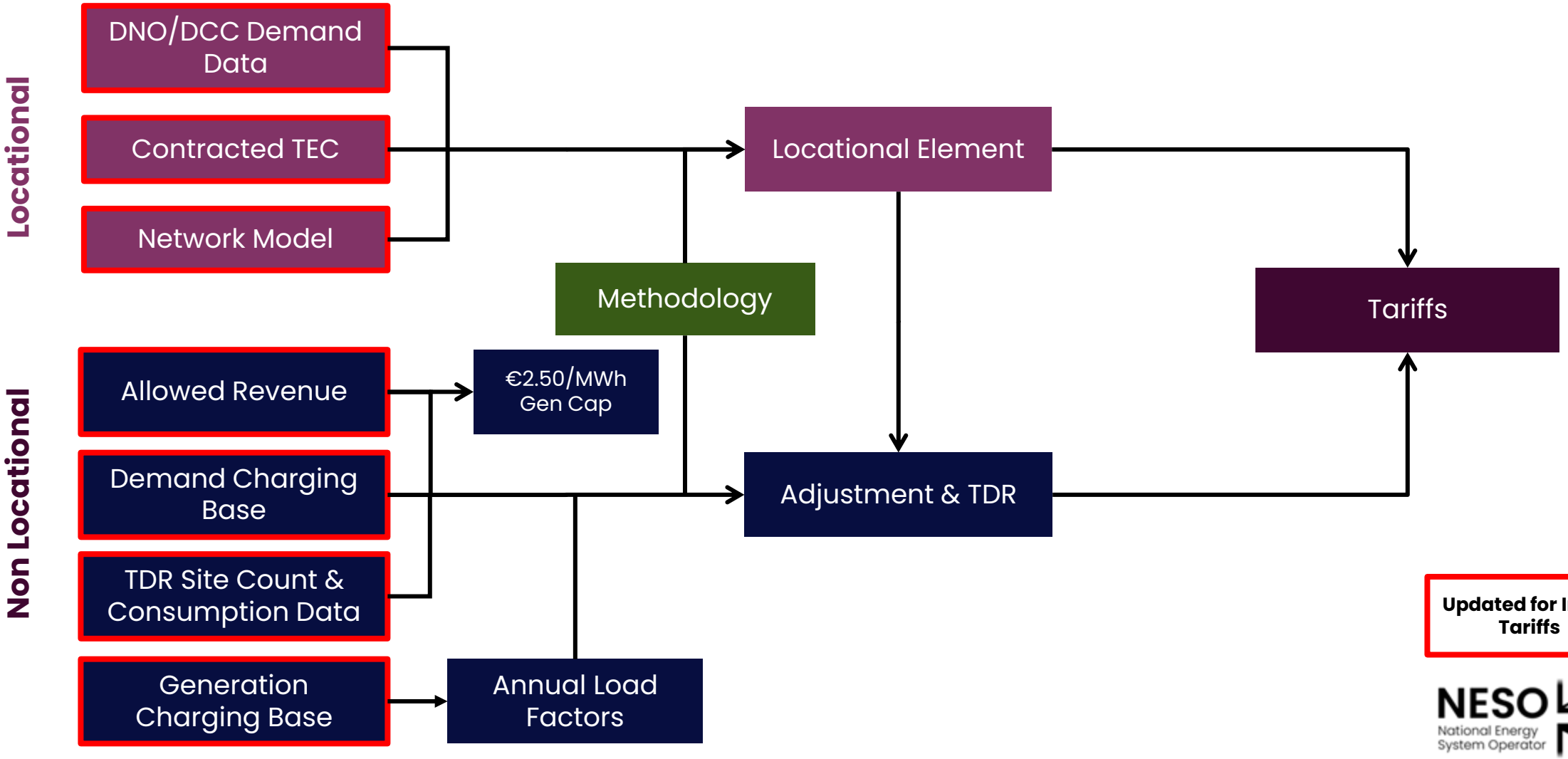
## CUSC Modifications

- Please see our website for details of in-flight modifications:
- neso.energy/industry-information/codes/connection-and-use-system-code-cusc

# Key inputs and findings

Sarah Chleboun

# Key Inputs for TNUoS Tariffs




**Updated for Initial Tariffs**

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# Input changes in this tariff publication

| | | April 2026 | Sept 2026 | Draft Tariffs November 2026 | Final Tariffs January 2027 |
|---|---|---|---|---|---|
| **Methodology** | | **Open to industry governance** | | | |
| Locational | DNO/DCC Demand Data | Initial update using previous year's data source | | Week 24 updated | |
| | Contracted TEC | Latest TEC Register | Latest TEC Register | TEC Register Frozen at 31 October | |
| | Network Model | Initial update using previous year's data source (except local circuit changes which are updated quarterly) | | Latest version based on ETYS | |
| | Inflation | Forecast | Forecast | Forecast | Actual |
| Non-locational | OFTO Revenue (part of allowed revenue) | Forecast | Forecast | Forecast | From OFTOs & NESO best view |
| | Allowed Revenue (non OFTO changes) | Initial update using previous year's data source | Update financial parameters | Latest ONTO and interconnector revenue submissions | Latest ONTO and interconnector revenue submissions |
| | Demand Charging Bases (incl. TDR Site Count) | Initial update using previous year's data source | Revised forecast | Revised forecast | Revised by exception |
| | TDR Consumption Data | Initial update using previous year's DN data | | DNO/IDNO consumption update received | |
| | Generation Charging Base | NESO best view | NESO best view | NESO best view | NESO final best view |
| | Generation ALFs | Previous year's data source | | Draft ALFs published | Final ALFs published |
| | Generation Revenue (G/D split) | Forecast | Forecast | Forecast | Generation revenue £m fixed |

# Key findings

## Total Revenue

- The total TNUoS revenue is forecast at **£9.11bn** for FY2027/28, (an increase of £1.50bn compared to Final Tariffs for FY2026/27). This increase is driven by increases in the Onshore TO Allowed Revenues (£1.58bn), Offshore TO Allowed Revenues (£107m) and offset by a decrease from interconnector revenues and other passthrough items (-£182m).

## Generation

- Revenue is forecast to be **£1.39bn** for 2027/28, this is an increase of £154m since the 2026/27 Final Tariffs, mainly driven by the increase in expected offshore generation local charges (£107m).
- The generation charging base for 2027/28 is currently forecast at 121.8GW based on our best view, an increase of 20GW since the 2026/27 Final tariffs.
- The average generation tariff for 2027/28 is £11.38/kW, a decrease of £0.74/kW since 2026/27, due to the increase in the expected charging base outweighing the increase in generation revenue to be collected.

## Demand

- Demand revenue for 2027/28 is forecast to be **£7.73bn**, an increase of £1.35bn since the 2026/27 Final tariffs.

## Consumer Bill

- For the 2027/28 charging year we forecast the cost of TNUoS on the average consumer electricity bill to be £96.85. This is an increase of £13.61 since our Final 2026/27 Tariffs, but £7.70 lower than what we forecast for 2027/28 in last year's 5-year view.

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# Revenue

Priya Chigullapalli

# TNUoS Revenue

| £m Nominal | 2026/27 Final | 2027/28 | 2028/29 | 2029/30 | 2030/31 | 2031/32 |
|---|---|---|---|---|---|---|
| **ONTO Income from TNUoS** | | | | | | |
| National Grid Electricity Transmission | 3,287.0 | 4,012.2 | 4,644.4 | 5,241.3 | 5,802.1 | 5,925.6 |
| Scottish Power Transmission | 1,082.9 | 1,468.4 | 1,498.8 | 1,624.2 | 1,717.1 | 1,746.0 |
| SHE Transmission | 2,083.1 | 2,551.2 | 3,308.2 | 3,777.7 | 3,874.4 | 4,033.7 |
| **Total ONTO Income from TNUoS** | **6,453.0** | **8,031.8** | **9,451.4** | **10,643.2** | **11,393.6** | **11,705.3** |
| | | | | | | |
| **Other Income from TNUoS** | | | | | | |
| Other Pass-through from TNUoS | 112.4 | 92.7 | 81.3 | 74.5 | 71.3 | 57.5 |
| Offshore (plus interconnector contribution / allowance) | 1,045.3 | 990.4 | 1,326.3 | 1,403.9 | 1,425.6 | 1,517.3 |
| **Total Other Income from TNUoS** | **1,157.7** | **1,083.0** | **1,407.6** | **1,478.4** | **1,496.9** | **1,574.8** |
| | | | | | | |
| **Total to Collect from TNUoS** | **7,610.7** | **9,114.8** | **10,859.0** | **12,121.7** | **12,890.5** | **13,280.1** |

Changes since 2026/27 Final have been driven by:

**Onshore TO Revenue ( +£1,578.76m)**

- Forecasts for all 3 ONTO's based on January 2026 submissions.

**Offshore TO Revenue and Interconnectors (-£54.87m )**

- Based on offshore and interconnector January 2026 submissions.

**Other Pass-Through Items (-£19.79m)**

- Decrease in the adjustment term and other passthrough items

# Summary of Revenue to be Recovered

| | | | 2027/28 Tariffs | | | |
|---|---|---|---|---|---|---|
| Code | Revenue | 2026/27 Final | Initial | September | Draft | Final |
| CAPEC | Limit on generation tariff (€/MWh) | 2.50 | 2.50 | | | |
| y | Error Margin | 30.3% | 30.3% | | | |
| ER | Exchange Rate (€/£) | 1.19 | 1.15 | | | |
| MAR | Total Revenue (£m) | 7,610.05 | 9,114.15 | | | |
| GO | Generation Output (TWh) | 199.28 | 214.00 | | | |
| G | % of revenue from generation | 16.18% | 15.20% | | | |
| D | % of revenue from demand | 83.82% | 84.80% | | | |
| G.R | Revenue recovered from generation (£m) | 1,231.67 | 1,385.70 | | | |
| D.R | Revenue recovered from demand (£m) | 6,378.38 | 7,728.45 | | | |



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# Generation Tariffs

Sarah Chleboun

# Contracted, Modelled & Chargeable Generation Capacity

- The Contracted TEC is expected to be 138.2 GW, an increase of 18.08 GW.
- The generation charging base for 2027/28 is forecast at 121.81 GW. This is an increase of 20.16 GW since 2026/27.
- The locational tariffs will be based on the TEC registers as of 31st October in our Draft and Final tariffs.

| | | 2027/28 Tariffs |
|---|---|---|
| Generation (GW) | 2026/27 Final | Initial |
| Contracted TEC | 120.14 | 138.22 |
| Modelled Best View TEC | For input to locational tariffs post 31st October please see Contracted TEC | 136.52 |
| Chargeable TEC | 101.64 | 121.81 |

- CONTRACTED:
  - Full TEC register used
- MODELLED:
  - Reduction in TEC in line with internal best view.
- CHARGEABLE:
  - Modelled TEC minus interconnector capacity

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# Generation Tariffs

- The Limiting Regulation requires the total TNUoS recovery from generators to be within the range of €0-2.50/MWh on average.
- All local onshore and local offshore tariffs are excluded in the Limiting Regulation €2.50/MWh cap for generator transmission charges, except for TNUoS local charges associated with pre-existing assets.
- The adjustment tariff was introduced to ensure compliance with the €2.50/MWh cap. It is forecast to increase by £0.36/kW, to become less negative.

| Generation Tariffs (£/kW) | 2026/27 Final | 2027/28 April | Change |
|---|---|---|---|
| Adjustment | - 2.476760 | - 2.114050 | 0.362710 |
| Average Generation Tariff* | 12.117642 | 11.376179 | - 0.741463 |

*The average generation tariff is calculated by dividing the total revenue payable by generation over the generation charging base in GW. It includes local charges.*

- The average generation tariff is forecast to be £11.38/kW for 2027/28, a decrease of £0.74/kW since 2026/27 due to the increase in charging base outweighing the increase in generation revenue to be collected.

# Generation TNUoS Tariffs – Wider tariffs

The generation TNUoS wider tariffs are made of the four elements below:

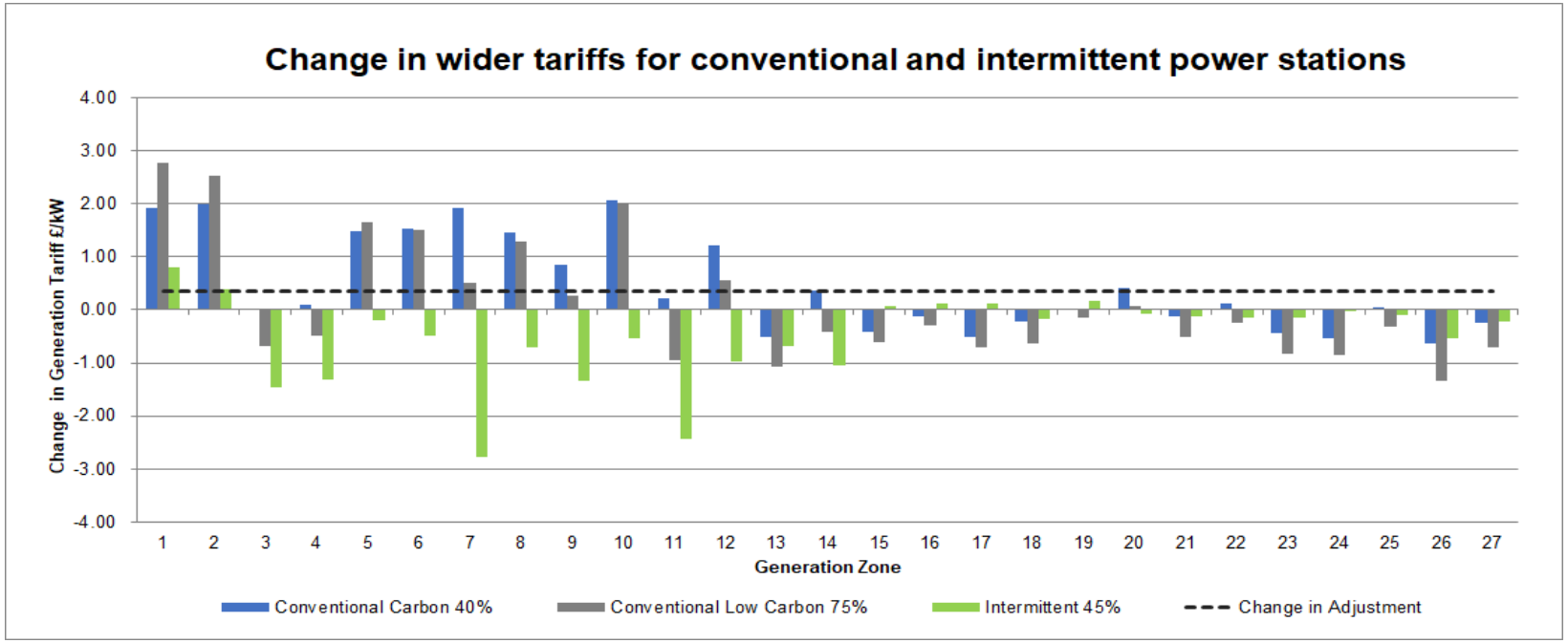
**Peak Security** | **Year Round Shared** | **Year Round Not Shared** | **Generator** Adjustment

Year Round Shared and Year Round Not Shared elements are multiplied by Annual Load Factors (ALFs) dependent on generation type

We publish examples for each generation type calculation using example ALFs:

| Conventional Carbon 40% | Conventional Low Carbon 75% | Intermittent 45% |
|---|---|---|
| Biomass | Nuclear | Offshore wind |
| CCGT/CHP | Hydro | Onshore wind |
| Coal | | Solar PV |
| OCGT/Oil | | Tidal |
| Pumped storage | | |
| Battery storage | | |
| Reactive Compensation | | |

# Generation Tariffs




- Changes in the locational tariffs have been impacted by the update of locational inputs, including the nodal generation and demand and the network model used to model flows.
- Conventional Carbon and Conventional Low Carbon tariffs are expected to increase in the North and decrease in the South.
- Intermittent tariffs are expected to see decreases in most areas.

# Local Tariffs

Alan Fradley/Nicky White

# Onshore Local Substation Tariffs

- Onshore local substation tariffs are inflated annually, in line with the increase in May-Oct CPIH.
- The local substation tariffs for 2027/28 will be refined in September and finalised in the Draft forecast in November.

## Initial View of local substation tariffs for 2027/28

| | | 2027/28 April Local Substation Tariffs (£/kW) | | |
|---|---|---|---|---|
| Substation Rating | Connection Type | 132kV | 275kV | 400kV |
| <1320 MW | No redundancy | 0.414097 | 0.171103 | 0.124718 |
| <1320 MW | Redundancy | 0.874864 | 0.379413 | 0.264454 |
| ≥1320 MW | No redundancy | - | 0.520505 | 0.362994 |
| ≥1320 MW | Redundancy | - | 0.796035 | 0.543927 |

# Onshore Local Circuits Tariffs

- Local circuits models for 2027/28 will be refined and will be locked down by the Draft Tariffs in November.
- We list the local circuit tariffs for non-MITS sites that are forecast to have directly-connected generators in the specific charging year.
- Tariffs can be positive or negative, depending on the "incremental" impact on the local networks.

| Substation Name | 2027/28 April (£/kW) | Substation Name | 2027/28 April (£/kW) | Substation Name | 2027/28 April (£/kW) |
|---|---|---|---|---|---|
| Aberarder | 1.816008 | Dorenell | 3.165846 | LETHANS | 2.961299 |
| Aberdeen Bay | 2.017787 | Douglas North | 0.807115 | Limekilns | 0.962668 |
| ACHANY EXTENSION | 2.020590 | Dunhill | 1.890057 | Lochay | 0.403557 |
| Achruach | -1.722947 | Dunlaw Extension | 0.557067 | Lorg | 1.241451 |
| Aigas | 0.932490 | Dunmaglass | 1.153502 | Luichart | 0.743682 |

*For full details of this table see Table 5 in the report / published tables file.*

# Offshore Local Tariffs

- Tariffs are set at asset transfer, or the beginning of a price control, and are indexed in line with the OFTO licence.
- Since January, the forecast has been updated with the latest inflation indices.
- Projects expected to asset transfer during 2026/27 onwards will have tariffs calculated once asset transfer has taken place.

| Offshore Generator | 2027/28 April Tariff Component (£/kW) | | |
|---|---|---|---|
| | Substation | Circuit | ETUoS |
| Barrow | 12.062854 | 63.739333 | 1.582735 |
| Beatrice | 10.522284 | 28.674626 | - |
| Burbo Bank Extension | 15.346714 | 29.631821 | - |
| Dudgeon | 22.430762 | 35.171453 | - |
| East Anglia 1 | 14.039789 | 59.193999 | - |
| Galloper | 23.118374 | 36.458268 | - |
| Greater Gabbard | 22.295296 | 51.618365 | - |
| Gunfleet Sands I | 26.320976 | 24.272880 | 4.536741 |
| Gunfleet Sands II | 26.320976 | 24.272880 | 4.536741 |
| Gwynt y mor | 34.395726 | 33.837337 | - |
| Hornsea 1A | 12.586286 | 39.356032 | - |
| Hornsea 1B | 12.586286 | 39.356032 | - |

For full details of this table see Table 7 in the report / published tables file

# Demand Charging Base Forecasts

Nicky White

# Site Count & Consumption Proportions

| | Band | Threshold (kWh/MWh or kVA) | | Consumption Proportion % | Site Count |
|---|---|---|---|---|---|
| | | Lower | Upper | | |
| | Domestic | | | 37.3% | 30,023,797 |
| kWh | LVN1 | - | <= 3,986 | 1.1% | 876,538 |
| kWh | LVN2 | > 3,986 | <= 13,677 | 2.3% | 657,512 |
| kWh | LVN3 | > 13,677 | <= 27,543 | 2.5% | 327,896 |
| kWh | LVN4 | > 27,543 | ∞ | 6.9% | 327,896 |
| kVA | LV1 | - | <= 90 | 3.0% | 86,408 |
| kVA | LV2 | > 90 | <= 150 | 4.4% | 64,806 |
| kVA | LV3 | > 150 | <= 250 | 2.8% | 32,403 |
| kVA | LV4 | > 250 | ∞ | 7.4% | 32,403 |
| kVA | HV1 | - | <= 500 | 1.7% | 8,696 |
| kVA | HV2 | > 500 | <= 1,100 | 4.6% | 6,522 |
| kVA | HV3 | > 1,100 | <= 2,000 | 3.6% | 3,261 |
| kVA | HV4 | > 2,000 | ∞ | 10.3% | 3,261 |
| kVA | EHV1 | - | <= 3,500 | 0.7% | 361 |
| kVA | EHV2 | > 3,500 | <= 11,000 | 1.9% | 272 |
| kVA | EHV3 | > 11,000 | <= 20,000 | 2.0% | 135 |
| kVA | EHV4 | > 20,000 | ∞ | 4.6% | 135 |
| MWh | T-Demand1 | - | <= 25,131 | 0.3% | 31 |
| MWh | T-Demand2 | > 25,131 | <= 64,451 | 0.4% | 21 |
| MWh | T-Demand3 | > 64,451 | <= 163,880 | 0.7% | 16 |
| MWh | T-Demand4 | > 163,880 | ∞ | 0.6% | 5 |

- This table shows the 2027/28 site count forecasts per band.
- Voltage grouping totals are consistent with data received from DNOs and current observed trends.
- The forecast has been produced using the banding thresholds which were recalculated for the RIIO-ET3 Price Control

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# System Peak, HH/NHH demand & Chargeable Export Forecast

| | | 2027/28 Tariffs | | | |
|---|---|---|---|---|---|
| **Charging Bases** | **2026/27 Final** | **Initial** | **September** | **Draft** | **Final** |
| Generation (GW) | 101.64 | 121.81 | | | |
| NHH Demand (4pm-7pm TWh) | 22.77 | 23.06 | | | |
| **Gross charging** | | | | | |
| Total Average Gross Triad (GW) | 47.54 | 48.32 | | | |
| HH Demand Average Gross Triad (GW) | 16.71 | 16.63 | | | |
| Embedded Generation Export (GW) | 6.71 | 7.65 | | | |

Compared to 2026/27 Finals:

- Overall system demand has increased by 20.16 GW
- Chargeable Export Volume forecast has increased by 14% to 7.65 GW
- NHH forecast has increased by 1.3% to 23.06 TWh
- HH demand forecast has decreased by 0.5% to 16.63 GW



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# Demand Tariffs

Dan Hickman

# Demand Tariffs

- The demand residual tariff is forecast to be 21% higher than 26/27 increasing broadly in line with increases in allowed revenue.
- Compared to 26/27 Finals, both the average HH & NHH demand tariffs are forecast to increase. These are due to changes in the nodal demand and generation forecasts which have adjusted flows within the transport model.
- The average HH gross tariff is forecasted to be £3.48/kW, an increase of £0.69/kW compared to 26/27. The average NHH tariff is forecast at 0.48p/kWh, an increase of 0.10p/kWh.

| Non-locational Banded Tariffs | 2026/27 Final | 2027/28 April | Change |
|---|---|---|---|
| Unmetered (p/kWh/annum) | 2.568147 | 3.068032 | 0.499885 |
| Average Demand Residual (£/MWh) | 25.68147 | 30.68032 | 4.998850 |
| Demand Residual (£m) | 6,265.2 | 7,584.8 | 1,319.6 |
| **HH Tariffs (Locational)** | **2026/27 Final** | **2027/28 April** | **Change** |
| Average Tariff (£/kW) | 2.793189 | 3.479981 | 0.686793 |
| **EET** | **2026/27 Final** | **2027/28 April** | **Change** |
| Average Tariff (£/kW) | 3.045116 | 3.366767 | 0.321651 |
| AGIC (£/kW) | 3.143391 | 3.204673 | 0.061282 |
| Embedded Export Volume (GW) | 6.713095 | 7.645681 | 0.932586 |
| Total Credit (£m) | 20.442156 | 25.741225 | 5.299069 |
| **NHH Tariffs (locational)** | **2026/27 Final** | **2027/28 April** | **Change** |
| Average (p/kWh) | 0.381869 | 0.483541 | 0.101672 |

# Demand Residual Charges

- Changes in the demand residual £/day charges are impacted by:
  - Changes in overall demand revenue
  - Changes in demand Proportion used to allocate revenue to each charging band provided by DNOs
  - Forecast site counts per band

- On average, demand residual charges are forecast to increase by 21% in line with the increase in the demand residual revenue.

| Band | | 2026/27 Final | 2027/28 April | Change |
|---|---|---|---|---|
| Domestic | Tariff - £/Site/Day | 0.222566 | 0.257643 | 0.035077 |
| LV_NoMIC_1 | | 0.239315 | 0.263362 | 0.024047 |
| LV_NoMIC_2 | | 0.587299 | 0.729530 | 0.142231 |
| LV_NoMIC_3 | | 1.242416 | 1.587827 | 0.345411 |
| LV_NoMIC_4 | | 3.461015 | 4.379177 | 0.918162 |
| LV1 | | 5.797398 | 7.139101 | 1.341703 |
| LV2 | | 11.511840 | 14.176046 | 2.664206 |
| LV3 | | 14.381374 | 17.709681 | 3.328307 |
| LV4 | | 38.180103 | 47.016191 | 8.836088 |
| HV1 | | 31.839048 | 39.412715 | 7.573667 |
| HV2 | | 117.152788 | 145.020615 | 27.867827 |
| HV3 | | 185.418505 | 229.525103 | 44.106598 |
| HV4 | | 528.912335 | 654.727845 | 125.815510 |
| EHV1 | | 325.476550 | 402.855098 | 77.378548 |
| EHV2 | | 1,159.381475 | 1,427.699181 | 268.317706 |
| EHV3 | | 2,512.930533 | 3,110.690173 | 597.759640 |
| EHV4 | | 5,698.386405 | 7,053.881657 | 1,355.495252 |
| T-Demand1 | | 1,401.949529 | 1,675.061745 | 273.112216 |
| T-Demand2 | | 2,931.228837 | 3,619.000184 | 687.771347 |
| T-Demand3 | | 7,586.413858 | 9,366.458461 | 1,780.044603 |
| T-Demand4 | | 20,829.236682 | 25,716.522168 | 4,887.285486 |
| **Unmetered demand** | | **p/kWh** | **p/kWh** | |
| Unmetered | | 2.568147 | 3.068032 | 0.499885 |

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# Demand Residual Charges

| | Band | Consumption Proportion % | Site Count | 2026/27 Final TDR Charge (£/site/Day) | 2027/28 April TDR Charge (£/site/Day) | Increase % |
|---|---|---|---|---|---|---|
| | Domestic | 37.3% | 30,023,797 | 0.222566 | 0.257643 | 15.8% |
| kWh | LVN1 | 1.1% | 876,538 | 0.239315 | 0.263362 | 10.0% |
| | LVN2 | 2.3% | 657,512 | 0.587299 | 0.729530 | 24.2% |
| | LVN3 | 2.5% | 327,896 | 1.242416 | 1.587827 | 27.8% |
| | LVN4 | 6.9% | 327,896 | 3.461015 | 4.379177 | 26.5% |
| kVA | LV1 | 3.0% | 86,408 | 5.797398 | 7.139101 | 23.1% |
| | LV2 | 4.4% | 64,806 | 11.511840 | 14.176046 | 23.1% |
| | LV3 | 2.8% | 32,403 | 14.381374 | 17.709681 | 23.1% |
| | LV4 | 7.4% | 32,403 | 38.180103 | 47.016191 | 23.1% |
| | HV1 | 1.7% | 8,696 | 31.839048 | 39.412715 | 23.8% |
| | HV2 | 4.6% | 6,522 | 117.152788 | 145.020615 | 23.8% |
| | HV3 | 3.6% | 3,261 | 185.418505 | 229.525103 | 23.8% |
| | HV4 | 10.3% | 3,261 | 528.912335 | 654.727845 | 23.8% |
| | EHV1 | 0.7% | 361 | 325.476550 | 402.855098 | 23.8% |
| | EHV2 | 1.9% | 272 | 1,159.381475 | 1,427.699181 | 23.1% |
| | EHV3 | 2.0% | 135 | 2,512.930533 | 3,110.690173 | 23.8% |
| | EHV4 | 4.6% | 135 | 5,698.386405 | 7,053.881657 | 23.8% |
| MWh | T-Demand1 | 0.3% | 31 | 1,401.949529 | 1,675.061745 | 19.5% |
| | T-Demand2 | 0.4% | 21 | 2,931.228837 | 3,619.000184 | 23.5% |
| | T-Demand3 | 0.7% | 16 | 7,586.413858 | 9,366.458461 | 23.5% |
| | T-Demand4 | 0.6% | 5 | 20,829.236682 | 25,716.522168 | 23.5% |
| **Unmetered demand** | | | | | | |
| | Unmetered | 1.0% | | 2.568147 | 3.068032 | 19.5% |

- The forecast number of sites in each band is updated to reflect the new banding of all sites for RIIO-ET3.
- The proportion of revenue per charging band has been forecast in line with the forecast site counts based on the RIIO-ET3 bandings.



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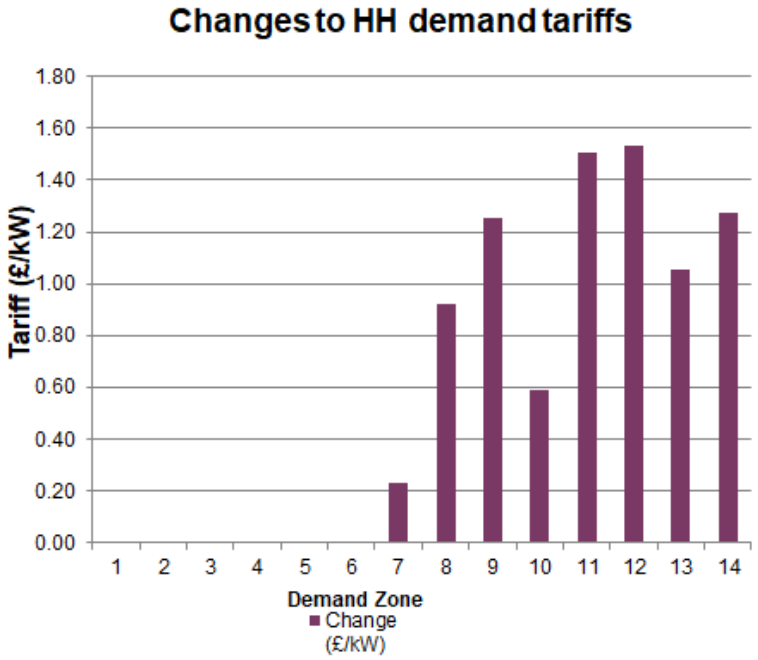
# HH Demand Tariffs

- The average forecast locational HH tariff for 2027/28 is £3.48/kW, an increase of £0.69/kW from 2026/27 Final Tariffs.
- As shown in the below table and graph, there are forecast increases in tariffs for zones 7 through to 14. These are due to changes in the nodal demand and generation forecasts which have adjusted flows within the transport model.

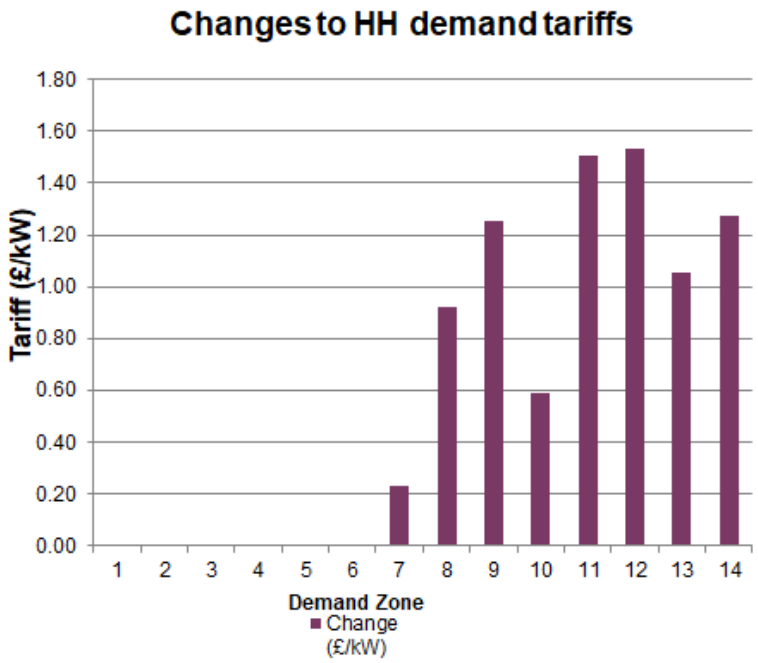
| Zone | Zone Name | 2026/27 Final (£/kW) | 2027/28 April (£/kW) | Change (£/kW) |
|---|---|---|---|---|
| 1 | Northern Scotland | - | - | - |
| 2 | Southern Scotland | - | - | - |
| 3 | Northern | - | - | - |
| 4 | North West | - | - | - |
| 5 | Yorkshire | - | - | - |
| 6 | N Wales & Mersey | - | - | - |
| 7 | East Midlands | - | 0.230675 | 0.23068 |
| 8 | Midlands | 2.633945 | 3.555364 | 0.92142 |
| 9 | Eastern | 0.063093 | 1.317511 | 1.254418 |
| 10 | South Wales | 5.969709 | 6.557388 | 0.58768 |
| 11 | South East | 4.368073 | 5.871060 | 1.502987 |
| 12 | London | 6.453239 | 7.986827 | 1.533588 |
| 13 | Southern | 7.354150 | 8.405911 | 1.051761 |
| 14 | South Western | 14.130209 | 15.404273 | 1.27406 |



# NHH Tariffs

- The average NHH tariff for 2027/28 is 0.48p/kWh, an increase of 0.1p/kWh from 2026/27 Final Tariffs.
- As shown in the below table and graph, there are forecast increases in tariffs for zones 7 through to 14. These are due to changes in the nodal demand and generation forecasts which have adjusted flows within the transport model.

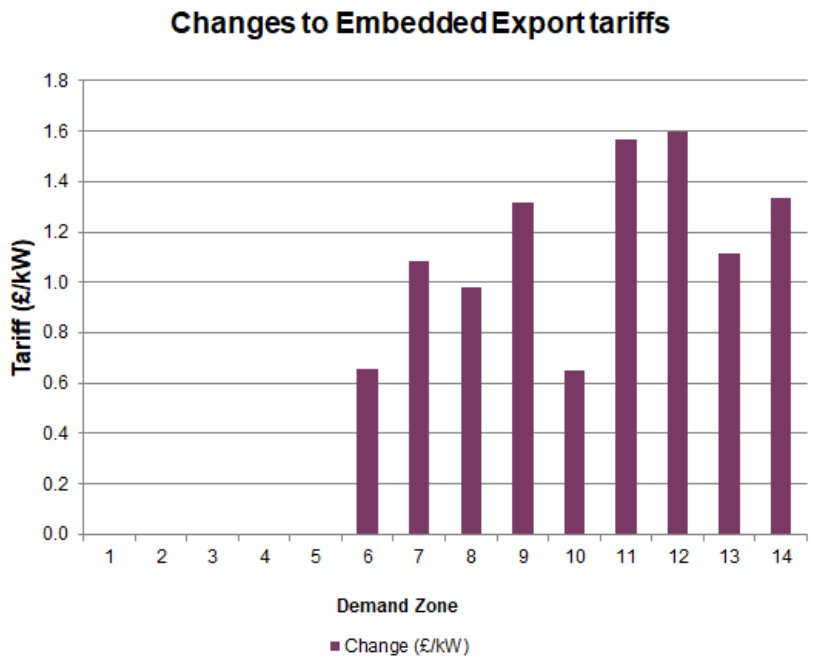
| Zone | Zone Name | 2026/27 Final (£/kW) | 2027/28 April (£/kW) | Change (£/kW) |
|---|---|---|---|---|
| 1 | Northern Scotland | - | - | - |
| 2 | Southern Scotland | - | - | - |
| 3 | Northern | - | - | - |
| 4 | North West | - | - | - |
| 5 | Yorkshire | - | - | - |
| 6 | N Wales & Mersey | - | - | - |
| 7 | East Midlands | - | 0.230675 | 0.23068 |
| 8 | Midlands | 2.633945 | 3.555364 | 0.92142 |
| 9 | Eastern | 0.063093 | 1.317511 | 1.254418 |
| 10 | South Wales | 5.969709 | 6.557388 | 0.58768 |
| 11 | South East | 4.368073 | 5.871060 | 1.502987 |
| 12 | London | 6.453239 | 7.986827 | 1.533588 |
| 13 | Southern | 7.354150 | 8.405911 | 1.051761 |
| 14 | South Western | 14.130209 | 15.404273 | 1.27406 |



# Embedded Export

- The average EET for 2027/28 is forecast to be £3.37/kW, which is an increase of £0.32/kW from 2026/27 Final Tariffs.
- As shown in the below table and graph, there are fluctuations in tariffs for zones 6 through to 14. Similar to HH Tariffs these are due to changes in the demand backgrounds which have adjusted flows within the transport model.

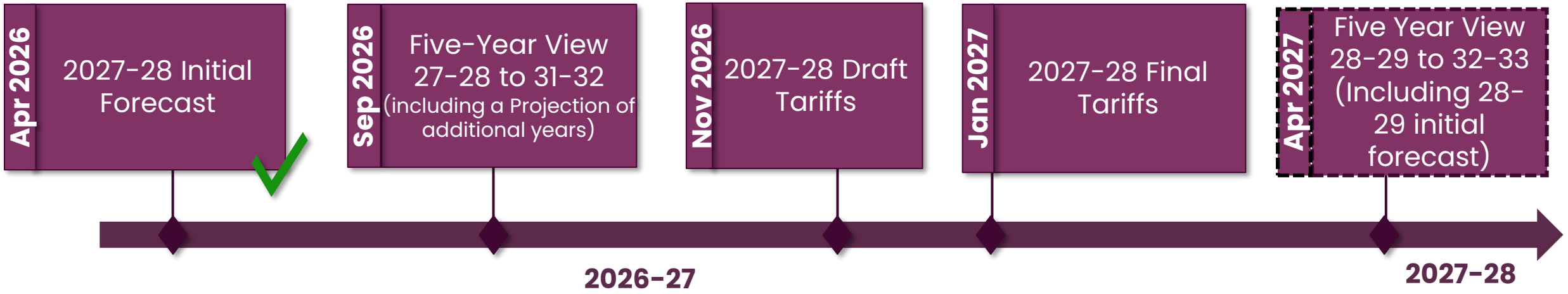
| Zone | Zone Name | 2026/27 Final (£/kW) | 2027/28 April (£/kW) | Change (£/kW) |
|---|---|---|---|---|
| 1 | Northern Scotland | - | - | - |
| 2 | Southern Scotland | - | - | - |
| 3 | Northern | - | - | - |
| 4 | North West | - | - | - |
| 5 | Yorkshire | - | - | - |
| 6 | N Wales & Mersey | 0.153008 | 0.809519 | 0.65651 |
| 7 | East Midlands | 2.353700 | 3.435348 | 1.081648 |
| 8 | Midlands | 5.777336 | 6.760037 | 0.98270 |
| 9 | Eastern | 3.206484 | 4.522184 | 1.315700 |
| 10 | South Wales | 9.113100 | 9.762061 | 0.64896 |
| 11 | South East | 7.511464 | 9.075733 | 1.564269 |
| 12 | London | 9.596630 | 11.191500 | 1.594870 |
| 13 | Southern | 10.497541 | 11.610584 | 1.113043 |
| 14 | South Western | 17.273600 | 18.608946 | 1.33535 |



# Next Steps

Nick Everitt

# Tariff Timetable




- The next publication will be the Five-Year View of 2027/28 – 2031/32 tariffs & Projection of additional years, which will be published in September 2026.
- The final tariffs for 2027/28 will be published in January 2027 and will apply from April 2027.

# Getting involved

### Transmission Charging Methodology Forum (TCMF)

- We will continue to engage with you on our TNUoS forecast via the monthly TCMF meetings.
- Interested? Further details can be found on the NESO website

### Charging Future Forum

- One place to learn, contribute and shape the reform of GB's electricity network access and charging arrangements
- Interested? Further information can be found on the Charging Futures Website or sign up to receive more information here.

### Transport and Tariff Model Training

- We plan on running more Transport and Tariff Model training sessions, which will be scheduled soon.
- Please provide suggestions and register your interest via TNUoS.queries@neso.energy
- The recordings from the last training session can be found here.

If you're not already subscribed to our mailing list, you can subscribe here

# Q&A

A Q&A session was held during the webinar where these slides were presented. A link to the Q&A document will be incorporated in this slide pack once it is complete. A summary of the questions received, and answers can be found using the following link:

neso.energy/document/380296/download

If you have any further questions, please contact us at TNUoS.queries@neso.energy



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# Thank you

Please send any feedback that you have via email to:

tnuos.queries@neso.energy



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# Useful Links

**Publications for TNUoS Charges**

https://www.neso.energy/industry-information/charging/tnuos-charges

**Data portal**

https://www.neso.energy/industry-information/charging/tnuos-charges

**Initial TNUoS Tariffs for 2027/28 - Report**

https://www.neso.energy/document/380281/download

**Initial TNUoS Tariffs for 2027/28 - Tables**

https://www.neso.energy/document/380286/download

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