

TNUoS Tariffs Five-Year View for 2027/28– 2031/32 Webinar

NESO Revenue Team
October 2026

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Agenda

1. Introduction
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3. TNUoS Tariffs Uncertainties
4. Key inputs & findings
5. Revenue
6. Generation tariffs
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8. Demand tariffs
9. Sensitivity Analysis
10. Next Steps
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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



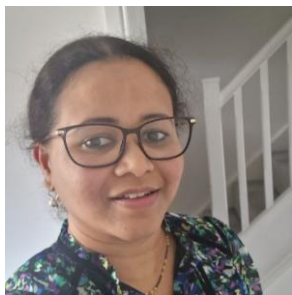
- Overall TNUoS tariff setting
- Offshore revenue & local tariffs
- Local substation
- Networks /Generation
- Onshore Local Circuits
- ALFs

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

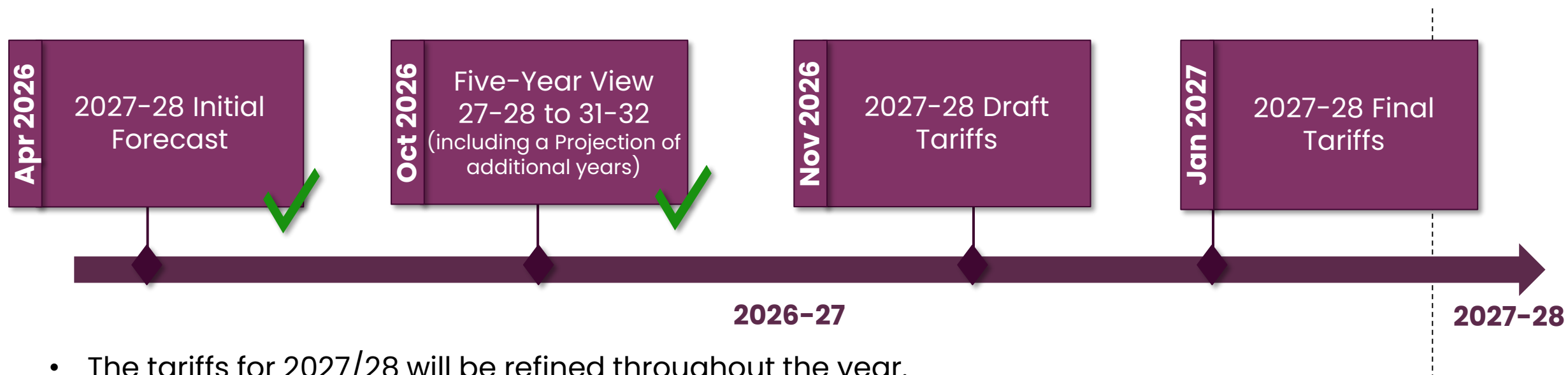
Edward Adofo



- 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

There are several uncertainties over the next 5 years which we have taken into account in the setting of tariffs for 2027/28 onwards.

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.

Offshore Revenue

Four OFTO Licences are due to come to an end in years 3-5 of the publication. We have assumed the continuation of all affected projects with a 50% revenue stream.

CUSC Modifications

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

Sensitivities

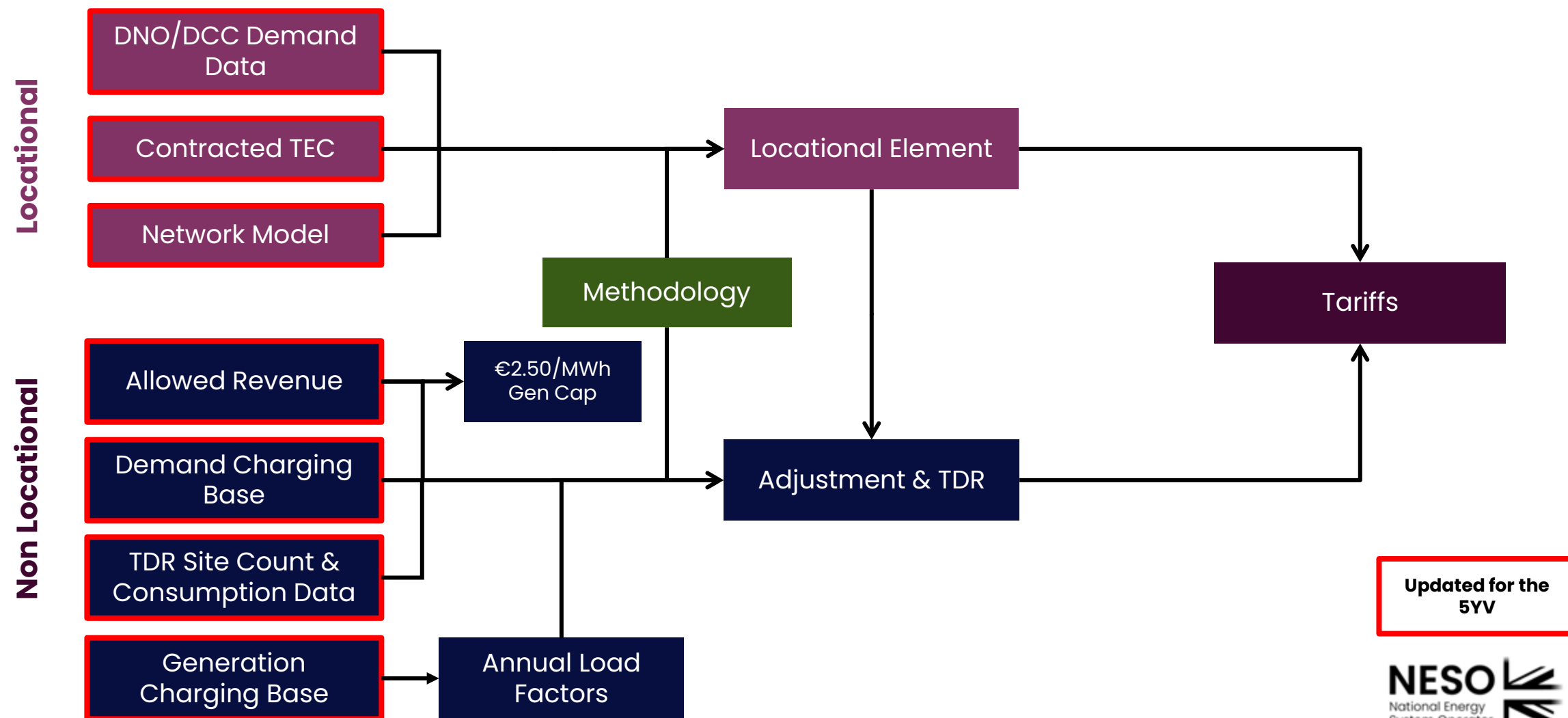
Having consulted the industry, we have also included sensitivities to provide industry with further information.

- Impact of Revenue changes

Key inputs and findings

Sarah Chleboun

Key Inputs for TNUoS Tariffs



Input changes in this tariff publication

		April 2026	Oct 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 **£9.47bn** for FY2027/28, (an increase of £0.36bn compared to Initial Forecast for FY2027/28). This is forecast to increase to **£13.80bn** in 2031/32, with TO revenues based on the latest revenue submissions received in January 2026.

Generation

- Generation revenue is forecast to be **£1.36bn** for 2027/28, it is forecast to grow to **£1.96bn** by 2031/32, an increase of £592m, mainly driven by the increase in expected offshore generation local charges.
- The generation charging base for 2027/28 has been forecast as **110.7GW** based on our best view, increasing to **158.4GW** in 2031/32.
- The average generation tariff for 2027/28 is **£12.32/kW**, it is expected to fluctuate before reaching to **£12.35/kW** in 2031/32.

Demand

- Demand revenue for 2027/28 is forecast to be **£8.11bn**, an increase of £378m from Initial Tariffs. This is driven by the increase in the forecast total revenue. From 2027/28 the demand revenue is forecast to increase year on year to **£11.85bn** by 2031/32 in-line with the year-on-year increase in total revenue.

Consumer Bill

- For the 2027/28 charging year, we forecast TNUoS on the average domestic electricity bill to be **£103.24**, representing 12% of the total bill. This is £20.00 higher than under the Final 2026/27 Tariffs, when TNUoS represented 8.8% of the total bill, and £6.39 higher than our Initial 2027/28 Tariff Forecast.

Revenue

Priya Chigullapalli

TNUoS Revenue

£m Nominal	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
TO Income from TNUoS						
National Grid Electricity Transmission	4,012.2	4,142.9	4,684.2	5,286.3	5,851.8	5,962.1
Scottish Power Transmission	1,468.4	1,512.7	1,511.6	1,638.1	1,731.8	1,758.7
SHE Transmission	2,551.2	2,634.8	3,336.6	3,810.1	3,907.7	4,070.7
Total TO Income from TNUoS	8,031.8	8,290.4	9,532.4	10,734.4	11,491.2	11,791.6
Other Income from TNUoS						
Other Pass-through from TNUoS	92.7	212.6	123.9	117.9	121.4	117.0
Offshore (plus interconnector contribution / allowance)	990.4	967.7	1,283.5	1,473.2	1,591.0	1,893.0
Total Other Income from TNUoS	1,083.0	1,180.3	1,407.4	1,591.1	1,712.4	2,010.0
Total to Collect from TNUoS	9,114.8	9,470.7	10,939.8	12,325.5	13,203.6	13,801.6

Changes since 2027/28 Initial Forecast have been driven by:

Onshore TO Revenue (+£258.6m)

- Forecasts for all 3 ONTO's based on January 2026 submissions, updated for inflation and forecast under-recovery from 2026/27.

Offshore TO Revenue and Interconnectors (-£22.7m)

- Based on offshore and interconnector January 2026 submissions, updated for inflation.

Other Pass-Through Items (+£119.9m)

- Increase in the adjustment term and other passthrough items.

Summary of Revenue to be Recovered

Code	Revenue	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
CAPEC	Limit on generation tariff (€/MWh)	2.50	2.50	2.50	2.50	2.50	2.50
y	Error Margin	30.3%	27.8%	27.8%	27.8%	27.8%	27.8%
ER	Exchange Rate (€/£)	1.15	1.15	1.15	1.15	1.15	1.15
MAR	Total Revenue (£m)	9,114.15	9,469.87	10,938.94	12,324.63	13,202.78	13,800.74
GO	Generation Output (TWh)	214.00	204.64	213.74	217.93	235.80	249.18
G	% of revenue from generation	15.2%	14.4%	13.1%	13.0%	13.2%	14.17%
D	% of revenue from demand	84.80%	85.60%	86.87%	86.97%	86.76%	85.83%
G.R	Revenue recovered from generation (£m)	1,385.70	1,363.54	1,436.81	1,605.92	1,748.04	1,955.73
D.R	Revenue recovered from demand (£m)	7,728.45	8,106.33	9,502.13	10,718.71	11,454.75	11,845.02

Generation Tariffs

Sarah Chleboun

Contracted, Modelled & Chargeable Generation Capacity

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



Generation (GW)	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Contracted TEC	138.22	131.78	162.16	199.95	227.53	258.91
Modelled Best View TEC	136.52	122.78	132.32	145.95	161.26	174.91
Chargeable TEC	121.81	110.66	120.20	133.83	146.24	158.40

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 largely forecast to decrease, to become more negative, changing from -£2.17/kW in 2027/28 to -£5.39/kW by 2031/32.

Generation Tariffs (£/kW)	Initial Tariffs 2027/28	2027/28	2028/29	2029/30	2030/31	2031/32
Adjustment Tariff	- 2.114050	- 2.167730	- 2.477199	- 2.276787	- 4.685346	- 5.387665
Average Generation Tariff*	11.37618	12.321872	11.953440	11.999528	11.952995	12.346955

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 £12.32/kW for 2027/28, it is expected to fluctuate before reaching £12.35 kW in 2031/32.

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**

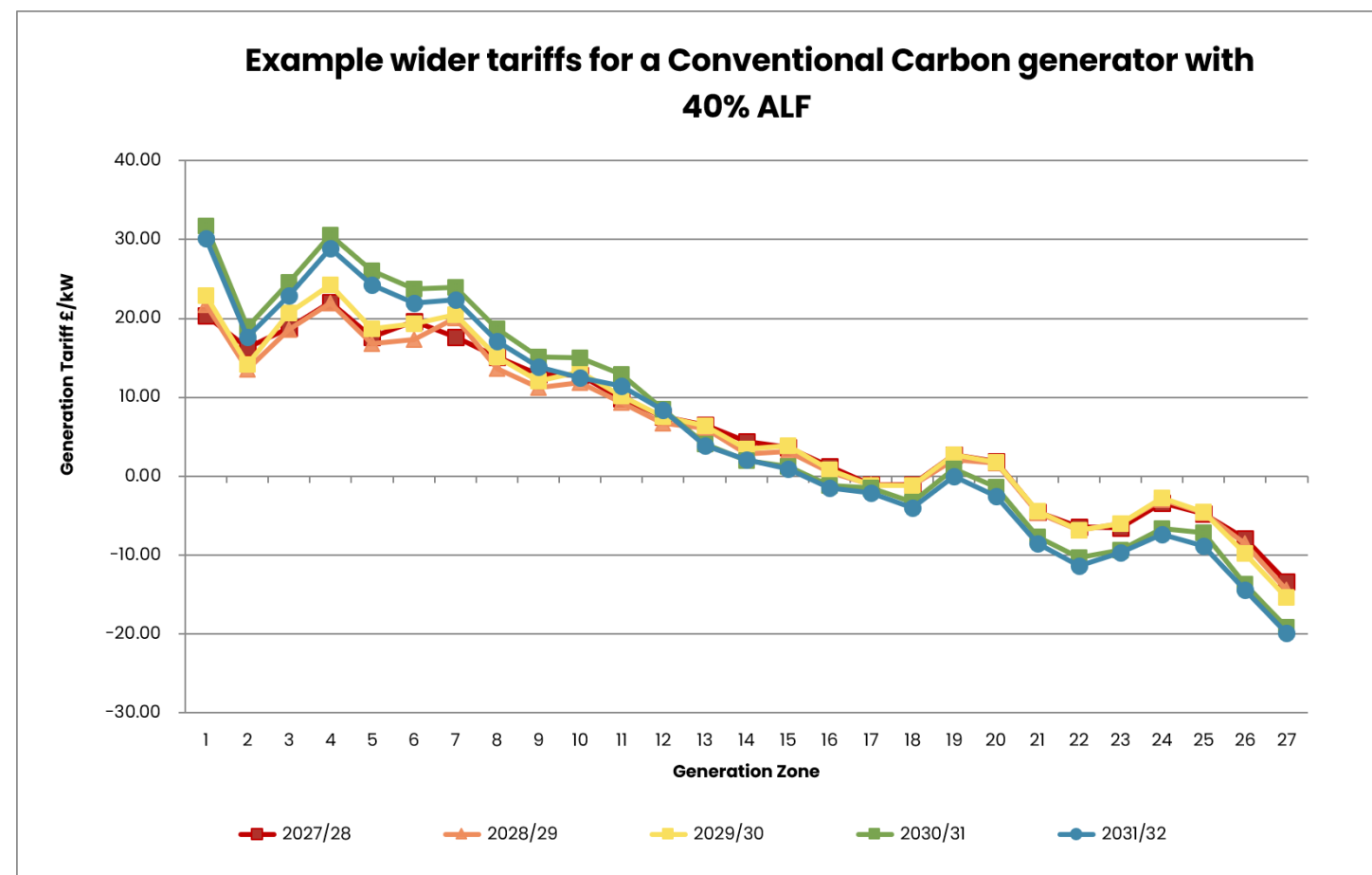
Year Round Shared and Year Round Not Shared elements are multiplied by Annual Load Factors (ALFs) dependent on generation type

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		

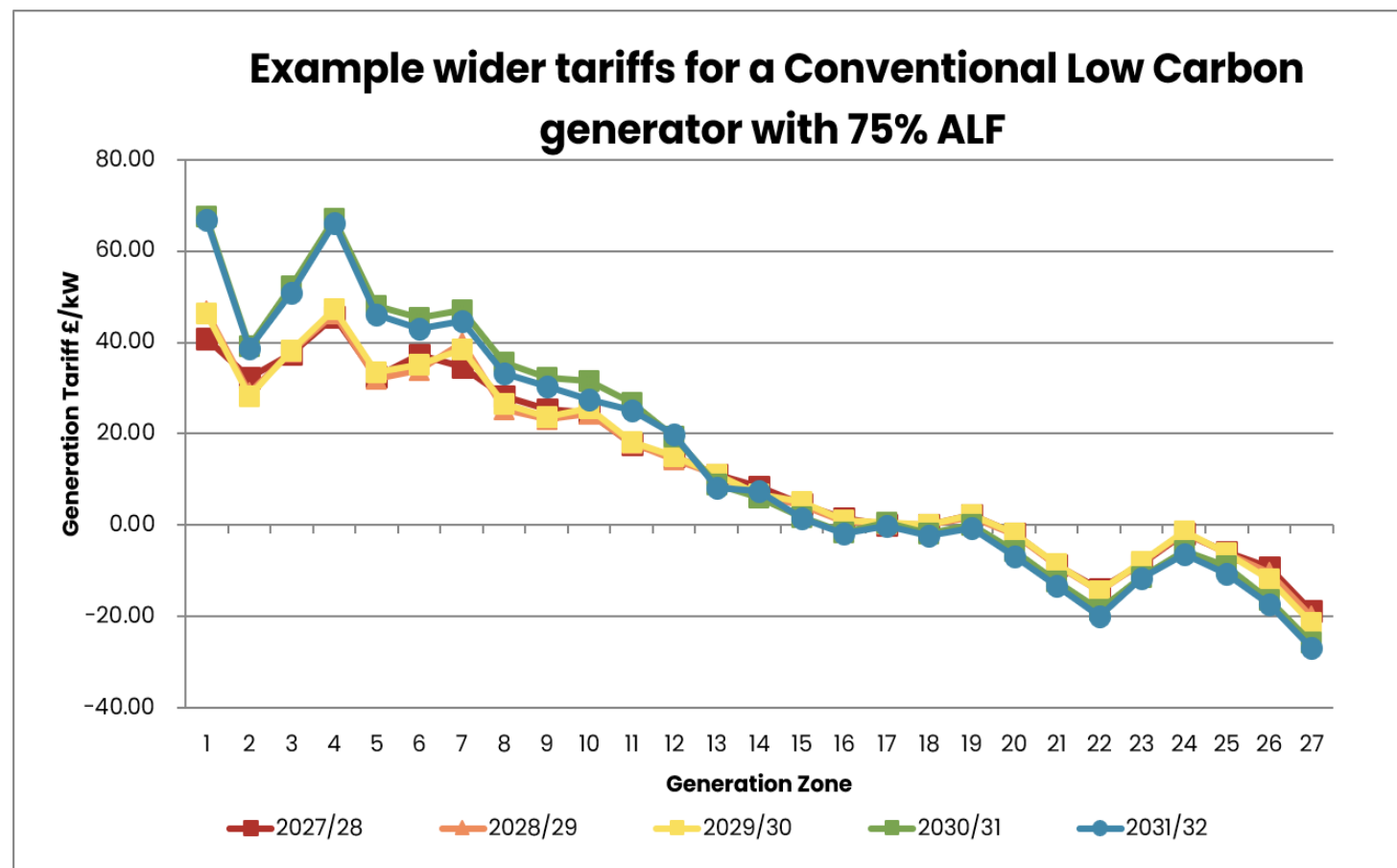
Generation Tariffs – Conventional Carbon

- In general, Conventional Carbon tariffs are expected to increase in magnitude over the 5 years, meaning that there are increase in the North and decreases in the South.



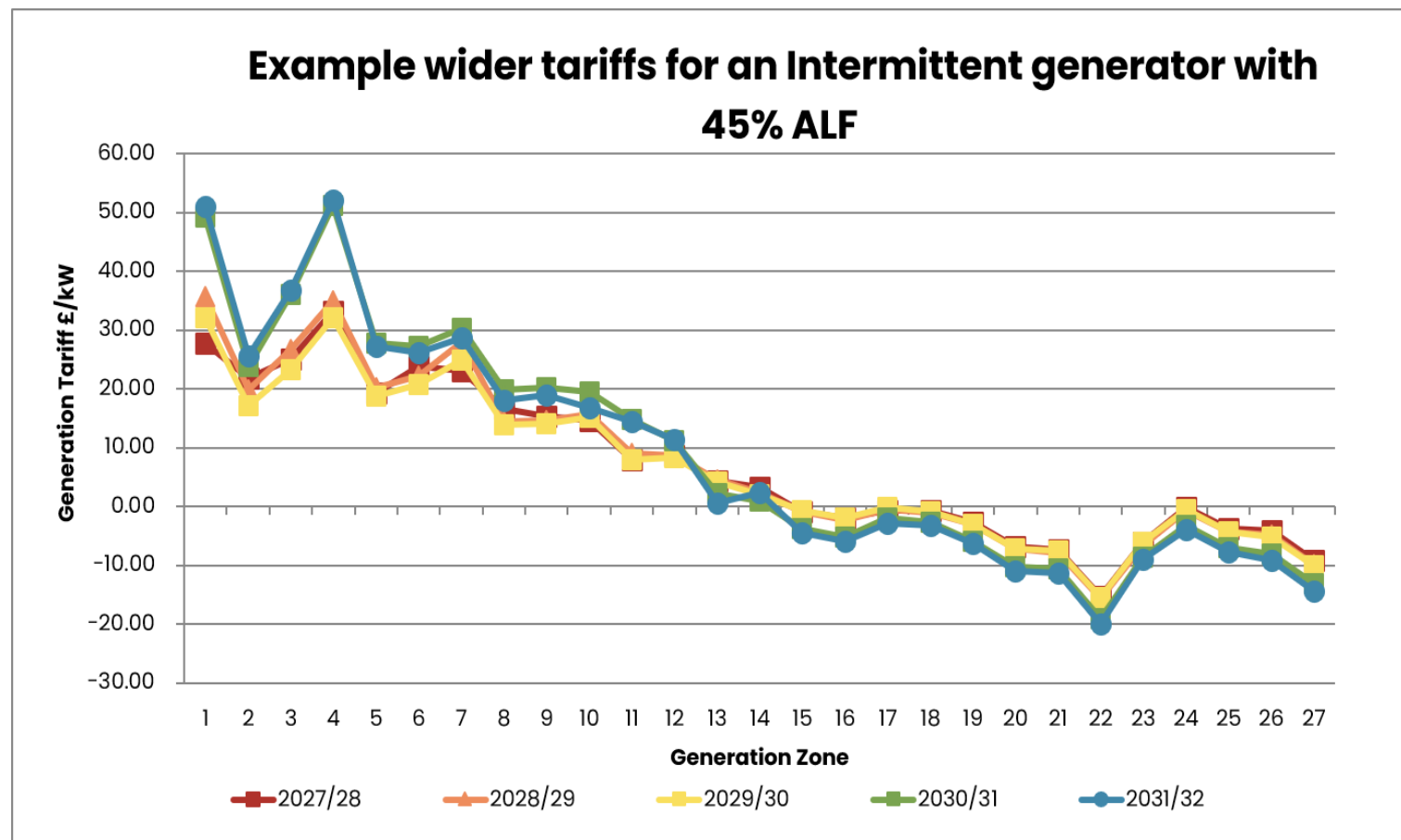
Generation Tariffs – Conventional Low Carbon

- Similar to Conventional Carbon although higher in the north due to paying full Year Round Not Shared tariff
- Increases in tariff for Scottish zones in 2030/31 due to the new HVDC links



Generation Tariffs – Intermittent

- Tariffs largely follow a similar profile to Conventional Low Carbon generators, but tariffs are slightly lower since they do not pay peak security tariffs



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 finalised in the Draft forecast in November.

Latest View of local substation tariffs for 2027/28

2027/28 Local Substation Tariff (£/kW)				
Substation Rating	Connection Type	132kV	275kV	400kV
<1320 MW	No redundancy	0.418770	0.173034	0.126126
<1320 MW	Redundancy	0.884738	0.383696	0.267439
≥1320 MW	No redundancy	–	0.526380	0.367091
≥1320 MW	Redundancy	–	0.805020	0.550066

Onshore Local Circuits Tariffs

- Local circuits models for 2027/28 will be refined and should be locked down in 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.

Connection Point	2027/28 (£/kW)	2028/29 (£/kW)	2029/30 (£/kW)	2030/31 (£/kW)	2031/32 (£/kW)
Breakish Windfarm			3.717608	3.792582	3.868436
Aberarder	1.873836	1.914541	1.952495	1.991872	2.031710
Aberdeen Bay	1.985465	2.028595	2.068811	2.110533	2.152745
Achany Extension	3.933867	4.019321	4.099002	4.181667	4.265303
Achruach	0.479663	0.244810	0.249659	0.254692	0.259783
Aigas	0.845789	1.444443	1.473078	1.502786	1.532843

For full details of this table see Table 11 in the 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 April, 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 October Tariff Component (£/kW)		
	Substation	Circuit	ETUoS
Barrow	12.225632	64.599445	1.604093
Beatrice	10.750613	29.296852	–
Burbo Bank Extension	15.679730	30.274818	–
Dudgeon	22.917499	35.934658	–
East Anglia 1	14.344446	60.478482	–
Galloper	23.620032	37.249395	–
Greater Gabbard	22.596153	52.314914	–
Gunfleet Sands I	26.676157	24.600423	4.597960
Gunfleet Sands II	26.676157	24.600423	4.597960
Gwynt y mor	35.142097	34.571592	–
Hornsea 1A	12.859403	40.210039	–
Hornsea 1B	12.859403	40.210039	–
Hornsea 1C	12.859403	40.210039	–

For full details of this table see Table 13 in the report / published tables file

Demand Charging Base Forecasts

Nicky White

Consumption Proportions

	Band	Consumption (GWh)				
		2027/28	2028/29	2029/30	2030/31	2031/32
kWh	Domestic	94,385	94,932	96,233	98,481	101,328
	LV_NoMIC_1	3,048	3,115	3,185	3,255	3,327
	LV_NoMIC_2	5,610	5,734	5,861	5,991	6,124
	LV_NoMIC_3	5,934	6,065	6,200	6,337	6,478
	LV_NoMIC_4	16,530	16,896	17,271	17,653	18,045
kVA	LV1	7,259	7,419	7,584	7,752	7,924
	LV2	10,810	11,050	11,294	11,545	11,801
	LV3	6,752	6,902	7,055	7,211	7,371
	LV4	17,926	18,323	18,730	19,145	19,569
	HV1	4,033	4,122	4,213	4,307	4,402
	HV2	11,129	11,375	11,628	11,885	12,149
	HV3	8,807	9,002	9,201	9,405	9,614
	HV4	25,122	25,678	26,248	26,829	27,424
	EHV1	1,713	1,751	1,789	1,829	1,870
	EHV2	4,576	4,677	4,781	4,887	4,995
	EHV3	4,959	5,069	5,181	5,296	5,413
	EHV4	11,244	11,494	11,748	12,009	12,275
MWh	T-Demand1	690	797	921	1,063	1,228
	T-Demand2	1,010	1,167	1,347	1,556	1,797
	T-Demand3	1,992	2,301	2,657	3,068	3,543
	T-Demand4	1,709	1,974	2,279	2,632	3,040
Unmetered demand						
	Unmetered	2,410	2,405	2,409	2,412	2,416

- This table shows the five-year forecast consumption proportions for each band.
- Total consumption by voltage grouping is consistent with data received from DNOs and current observed trends.
- The forecast uses the current RIIO-ET3 banding thresholds.
- The RIIO-ET3 thresholds have also been assumed for 2031/32, as thresholds for the next price control have not yet been forecast.

Site Counts

	Band	Site Count				
		2027/28	2028/29	2029/30	2030/31	2031/32
	Domestic	30,087,829	30,247,324	30,389,974	30,515,532	30,623,781
kWh	LV_NoMIC_1	868,648	868,648	868,648	868,648	868,648
	LV_NoMIC_2	658,578	658,578	658,578	658,578	658,578
	LV_NoMIC_3	340,324	337,523	335,036	332,858	330,981
	LV_NoMIC_4	314,460	314,460	314,460	314,460	314,460
kVA	LV1	93,983	94,755	95,446	96,056	96,581
	LV2	62,940	63,457	63,920	64,328	64,680
	LV3	34,002	34,281	34,531	34,751	34,941
	LV4	30,041	30,288	30,509	30,704	30,872
	HV1	9,860	9,860	9,860	9,860	9,860
	HV2	5,837	5,813	5,791	5,773	5,757
	HV3	3,368	3,361	3,356	3,350	3,346
	HV4	2,793	2,785	2,778	2,772	2,767
	EHV1	343	341	338	336	334
	EHV2	284	284	284	284	284
	EHV3	140	139	139	139	138
	EHV4	130	130	129	129	128
MWh	T-Demand1	32	35	36	38	39
	T-Demand2	21	23	24	26	27
	T-Demand3	20	22	25	26	26
	T-Demand4	6	8	10	10	14

- This table shows the forecast number of sites in each charging band over the five-year period.
- Total site counts by voltage grouping are consistent with data received from DNOs and current observed trends.
- The forecast uses the current RIIO-ET3 banding thresholds.
- For 2031/32, we have assumed that the RIIO-ET3 thresholds continue to apply, as thresholds for the next price control have not yet been forecast

System Peak, HH and NHH Demand, and Chargeable Export Forecasts

Charging Bases	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Generation (GW)	121.81	110.66	120.20	133.83	146.24	158.40
NHH Demand (4pm–7pm TWh)	23.06	23.50	24.15	24.97	25.84	26.83
Gross charging						
Total Average Gross Triad (GW)	48.32	48.75	49.33	49.56	51.05	52.58
HH Demand Average Gross Triad (GW)	16.63	17.57	17.26	17.08	16.86	17.03
Embedded Generation Export (GW)	7.65	7.45	7.52	7.42	7.64	7.87

2027/28 update compared with the April Initial Tariffs:

- System peak, HH demand and NHH demand forecasts have been updated using the latest data and assumptions.
- Chargeable embedded export volume has decreased from 7.65 GW to 7.45 GW.

Five-year outlook:

- Volumes are expected to plateau over the next couple of years before increasing later in the forecast.

Demand Tariffs

Dan Hickman

Demand Tariffs

- For 2027/28 on average, Transmission Demand Residual tariffs are forecast to be 5% higher than our initial tariffs, driven by the increase in revenue to be collected.
- The average HH & NHH demand tariffs are forecast to decrease in 2028/29 and start increasing again from 2029/30.

Non-locational Residual Tariffs	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Unmetered (p/kWh)	3.07	3.22	3.72	4.10	4.26	4.29
Demand Residual (£m)	7,585	7,973	9,372	10,580	11,276	11,662
HH Tariffs (Locational)	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Average Tariff (£/kW)	3.48	3.29	3.19	3.33	4.08	4.05
EET	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Average Tariff (£/kW)	3.37	4.30	4.30	4.53	5.17	5.21
AGIC (£/kW)	3.20	3.24	3.31	3.38	3.44	3.51
Embedded Export Volume (GW)	7.65	7.45	7.52	7.42	7.64	7.87
Total Credit (£m)	25.74	32.08	32.31	33.63	39.48	41.01
NHH Tariffs (locational)	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Average (p/kWh)	0.48	0.46	0.45	0.46	0.58	0.58

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 27% in 2027/28 compared to the current year in line with the increase in the demand residual revenue.
- They are forecast to continue to rise a further 46% on average between 2027/28 and 2031/32

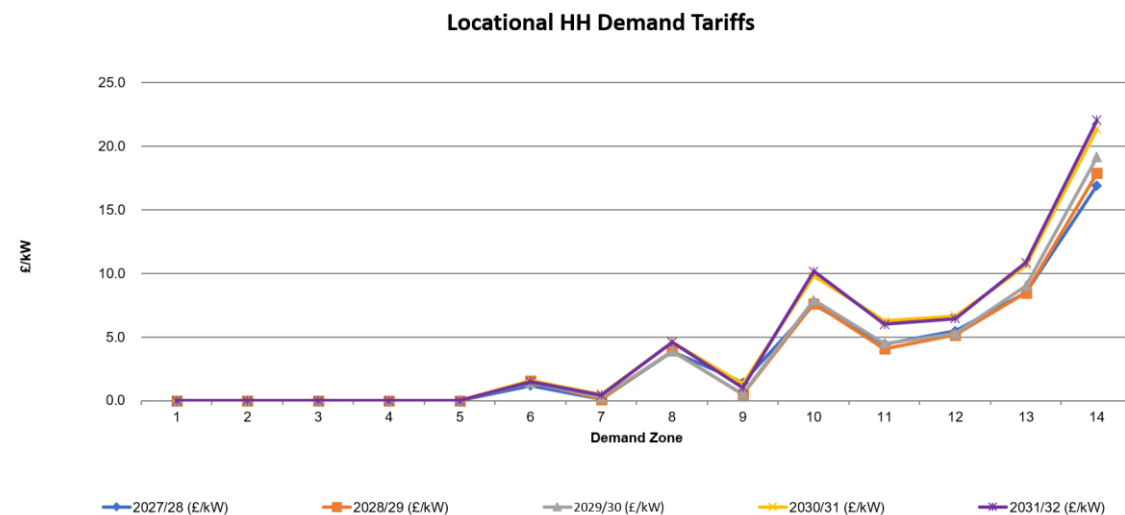
Band	2027/28 April Initial	2027/28	2028/29	2029/30	2030/31	2031/32
Domestic	0.257643	0.275932	0.319460	0.356025	0.376877	0.387433
LV_NoMIC_1	0.263362	0.308639	0.365069	0.412182	0.437612	0.448506
LV_NoMIC_2	0.729530	0.749268	0.886260	1.000635	1.062370	1.088815
LV_NoMIC_3	1.587827	1.533665	1.829125	2.080506	2.223322	2.291588
LV_NoMIC_4	4.379177	4.623741	5.469116	6.174924	6.555891	6.719087
LV1	7.139101	6.793444	7.970064	8.933446	9.424457	9.606534
LV2	14.176046	15.107212	17.723771	19.866134	20.958041	21.362943
LV3	17.709681	17.467824	20.493239	22.970361	24.232887	24.701058
LV4	47.016191	52.487322	61.578089	69.021349	72.814987	74.221745
HV1	39.412715	35.975413	42.552925	48.044531	51.008675	52.278436
HV2	145.020615	167.707832	199.193690	225.729772	240.429513	247.095775
HV3	229.525103	230.002080	272.590242	308.307974	327.830799	336.432715
HV4	654.727845	791.186897	938.491771	1,062.273453	1,130.293674	1,160.615350
EHV1	402.855098	438.791353	523.282845	595.128494	635.880430	655.275009
EHV2	1,427.699181	1,417.139634	1,676.240312	1,892.565088	2,009.328313	2,059.346621
EHV3	3,110.690173	3,114.389220	3,698.908205	4,191.482421	4,464.263398	4,587.889797
EHV4	7,053.881657	7,601.374271	9,028.025615	10,230.264871	10,896.048801	11,197.787107
T-Demand1	1,675.061745	1,882.724059	2,334.888356	2,861.329440	3,295.351396	3,676.978831
T-Demand2	3,619.000184	4,181.892288	5,192.424008	6,202.776004	7,009.349907	7,852.346799
T-Demand3	9,366.458461	8,986.377527	10,810.987265	12,151.709350	13,779.291381	15,954.615114
T-Demand4	25,716.522168	26,610.783952	24,621.839443	25,808.148507	30,254.736139	26,364.088267
Unmetered demand		p/kWh		p/kWh		
Unmetered		3.068032	3.219364	3.715229	4.103744	4.285558
Demand Residual (£m)		7584.792992	7,972.64	9,371.59	10,580.00	11,276.27
						11,662.24

*V2 updated 2029/30 transmission level tariffs for corrected site count forecast

HH Demand Tariffs

- The average HH gross tariff is forecast to be £3.29/kW in 2027/28, a decrease of £0.19/kW compared to our initial tariffs.
- This is forecast to increase to £4.05/kW in 3021/32

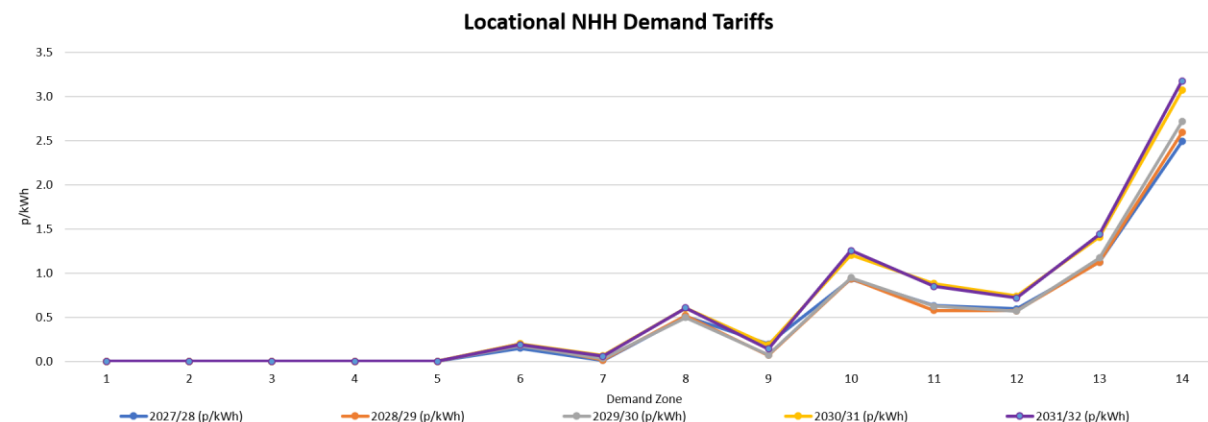
Zone	Zone Name	2027/28 April Initial	2027/28 (£/kW)	2028/29 (£/kW)	2029/30 (£/kW)	2030/31 (£/kW)	2031/32 (£/kW)
1	Northern Scotland	-	-	-	-	-	-
2	Southern Scotland	-	-	-	-	-	-
3	Northern	-	-	-	-	-	-
4	North West	-	-	-	-	-	-
5	Yorkshire	-	-	-	-	-	-
6	N Wales & Mersey	-	1.172013	1.553106	1.432207	1.581640	1.500501
7	East Midlands	0.230675	0.101222	0.110232	0.263839	0.506380	0.439005
8	Midlands	3.555364	3.866779	3.929884	3.860059	4.582768	4.598810
9	Eastern	1.317511	1.411571	0.508442	0.542197	1.341784	1.034897
10	South Wales	6.557388	7.571454	7.639431	7.892108	9.803642	10.180975
11	South East	5.871060	4.464584	4.082415	4.515338	6.275763	6.019030
12	London	7.986827	5.490841	5.165429	5.259470	6.664134	6.453455
13	Southern	8.405911	8.480694	8.475011	9.025254	10.628313	10.841189
14	South Western	15.404273	16.912246	17.883577	19.145394	21.363184	22.061824



NHH Tariffs

- The average NHH tariff is forecast to be 0.46 p/kWh, a decrease of 0.02 p/kWh since April.
- This is forecast to increase to 0.58 p/kWh in 3021/32

Zone	Zone Name	2027/28 April Initial	2027/28 (p/kWh)	2028/29 (p/kWh)	2029/30 (p/kWh)	2030/31 (p/kWh)	2031/32 (p/kWh)
1	Northern Scotland	-	-	-	-	-	-
2	Southern Scotland	-	-	-	-	-	-
3	Northern	-	-	-	-	-	-
4	North West	-	-	-	-	-	-
5	Yorkshire	-	-	-	-	-	-
6	N Wales & Mersey	-	0.149714	0.196479	0.177991	0.200326	0.190277
7	East Midlands	0.032180	0.013356	0.014549	0.034027	0.066538	0.057787
8	Midlands	0.490768	0.513318	0.520840	0.498767	0.602226	0.605197
9	Eastern	0.193894	0.197863	0.071646	0.074566	0.187171	0.144501
10	South Wales	0.823086	0.933672	0.934312	0.945394	1.203851	1.255923
11	South East	0.864400	0.630078	0.578833	0.625579	0.882297	0.848735
12	London	0.880626	0.596678	0.572313	0.568637	0.741712	0.718733
13	Southern	1.169712	1.126170	1.125410	1.171504	1.407720	1.440550
14	South Western	2.289536	2.489158	2.592684	2.715507	3.068610	3.173258



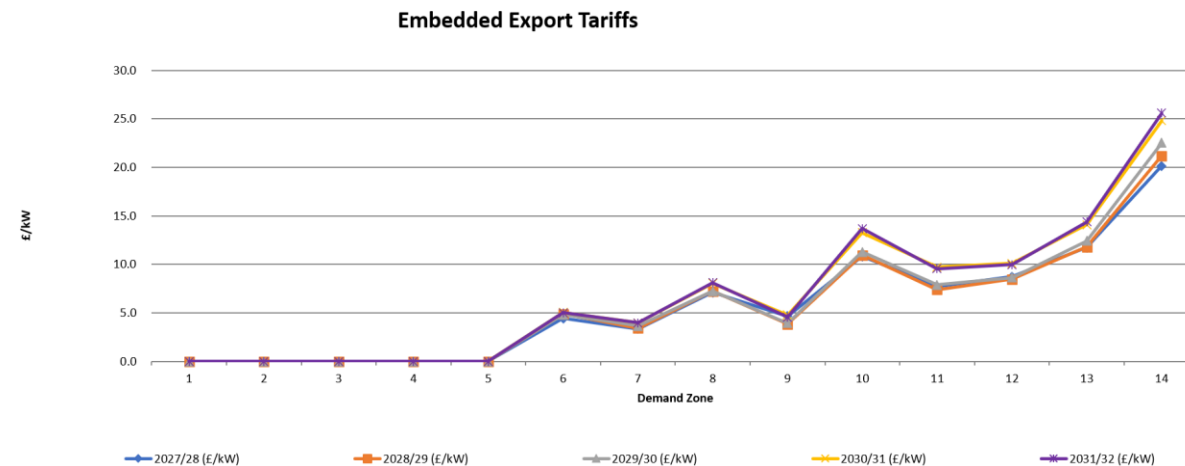
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- The average EET tariff is forecasted to be £4.30/kW in 2027/28, increasing to £5.21/kW by 2031/32.
- The EET Tariffs are the inverse of the HH Tariffs but with the addition of the AGIC. So a similar pattern can be seen.

Zone	Zone Name	2027/28 April Initial	2027/28 (£/kW)	2028/29 (£/kW)	2029/30 (£/kW)	2030/31 (£/kW)	2031/32 (£/kW)
1	Northern Scotland	-	-	-	-	-	-
2	Southern Scotland	-	-	-	-	-	-
3	Northern	-	-	-	-	-	-
4	North West	-	-	-	-	-	-
5	Yorkshire	-	-	-	-	-	-
6	N Wales & Mersey	0.809519	4.412855	4.864348	4.809092	5.026627	5.014390
7	East Midlands	3.435348	3.342064	3.421474	3.640724	3.951367	3.952894
8	Midlands	6.760037	7.107621	7.241126	7.236944	8.027755	8.112699
9	Eastern	4.522184	4.652413	3.819684	3.919082	4.786771	4.548786
10	South Wales	9.762061	10.812296	10.950673	11.268993	13.248629	13.694864
11	South East	9.075733	7.705426	7.393657	7.892223	9.720750	9.532919
12	London	11.191500	8.731683	8.476671	8.636355	10.109121	9.967344
13	Southern	11.610584	11.721536	11.786253	12.402139	14.073300	14.355078
14	South Western	18.608946	20.153088	21.194819	22.522279	24.808171	25.575713

These tariffs include:

AGIC (£/kW)	3.204673	3.240842	3.311242	3.376885	3.444987	3.513889
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Sensitivity Analysis

Katie Clark

Variation in Revenue on TDR

- As a broad rule of thumb, demand residual charges increase 1.3% for every additional £100m of allowed revenue.

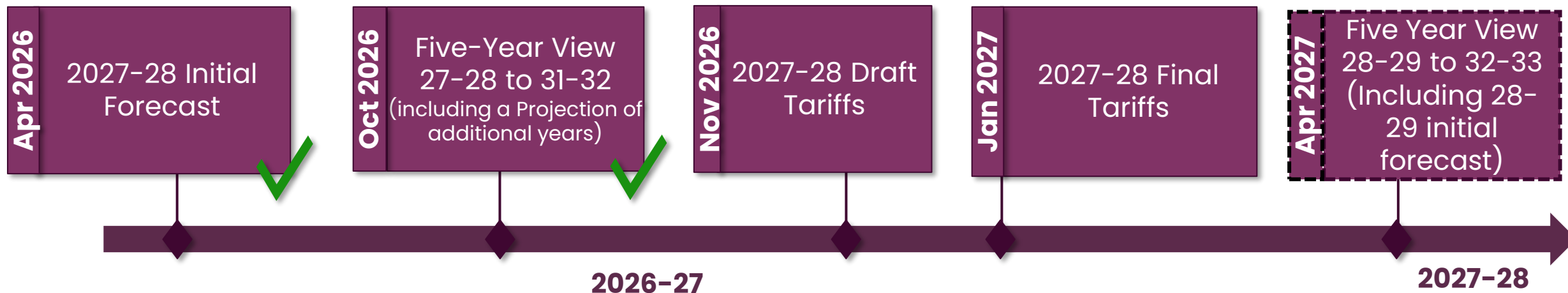
Sensitivity Scenario £m	2027/28	2028/29	2029/30	2030/31	2031/32
Sensitivity 1	8,523.6	9,845.8	11,092.9	11,883.3	12,421.4
Base Case	9,470.7	10,939.8	12,325.5	13,203.6	13,801.6
Sensitivity 2	9,814.4	10,437.2	12,254.0	13,437.8	14,868.2
Sensitivity 3	10,417.8	12,033.7	13,558.0	14,524.0	15,181.7

	2027/28			
	Sensitivity 1 - 10% Decrease in Allowed Revenue	Base Case	Sensitivity 2 - February 2026 PCFM	Sensitivity 3 - 10% Increase in Allowed Revenues
Revenue (£m)	8,523.63	9,470.70	9,814.43	10,417.77
Generation Share*	20.0%	14.4%	14.2%	13.1%
Demand Share	84.0%	85.6%	85.8%	86.9%
Total TDR charge/site	-11.9%	0%	4.3%	11.9%

Next Steps

Nick Everitt

Tariff Timetable



- The next publication will be the Draft Tariffs which will be published in November 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.

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

Thank you

Please send any feedback that you have via email to:

tnuos.queries@neso.energy



TNUoS.Queries@neso.energy



Useful Links

Publications for TNUoS charges

neso.energy/industry-information/charging/tnuos-charges#TNUOS-tariffs-and-notifications-of-changes

Data portal

neso.energy/industry-information/charging/tnuos-charges

Five-Year View of TNUoS Tariffs for 2027/28–2031/32 Report

neso.energy/document/388496/download

Five-Year View of TNUoS Tariffs for 2027/28–2031/32 Tables File

neso.energy/document/388501/download