08 Gas Advisory Council

October 2026



Disclaimer: Work contained herein is still in draft / work in progress format and subject to change. Draft material for early stakeholder engagement and awareness.

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08 GAC Agenda

14th October 2026 – Fora Soho – London

Time	Topic	
10.00-10.15	Welcome – Actions Review	NESO + Grant Wilson
10.15-10.45	DESNZ Updates	Rob Seaton – DESNZ
10.45-11.15	Ofgem Updates: Gas system connections and access arrangements	Freya Dobson - OFGEM
11.15 – 11.45	GSSA Update	Owen Hind – NESO
11.45-12.30	NESO Updates and Headline report - Gas Advisory Notes	GMS team – NESO
12.30-13.15	Lunch	
13.15-14.00	GAC membership update EMAC Updates	GMS team Lizzie Blaxland
14.00-14.15	GMR Feedback and Next Steps	GMS team – NESO
14.15-14.45	GMR Projects Progress Overview	GMS team - NESO
14.45-15.00	Break	
15.00-15:30	Strategic Spatial Energy Plan Updates	Robert Gibson - NESO
15:30 – 16:00	Investor Engagement: Cost of Capital	Anthony Belcher – NESO
	Energy Data Explorer	Grant Wilson

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Actions Review

ID	Description	Owner	Status
6.2	GAC Members to fill the Feedback form on GAC term	GAC	Closed – Expression of Interest now closed
7.1	NESO and Chair to discuss formal process to raise advice	NESO	Closed – Gas Advisory Notes to be discussed
7.2	GAC request to have early sighting of GSSA	NESO	Closed – GSSA included in todays agend
7.3	GAC request to have early sighting of Afry paper	NESO	Closed – Paper now launched and shared with GAC
7.4	NGT to share GB/European market comparison work	NGT	Closed – Shared with NESO
7.5	NESO to further refine project problem statements	NESO	Open – ongoing

DESNZ Updates

Rob Seaton

Ofgem Updates

Freya Dobson and Olivia Down

NESO Headline Report

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NESO Publications (July - Sept)

1. **Gas Market Roadmap (31 Jul 2026)**
   What: NESO's first strategic roadmap exploring how gas market arrangements may need to evolve through the energy transition, structured around market transition, resilience and emerging markets.
   Why it matters: Establishes a whole-system framework for future gas market development and identifies priority areas for future industry, regulatory and policy work. https://www.neso.energy/document/385036/download

2. **Biomethane: Exploring the Role of Biomethane in the Energy System to 2050 (Jul 2026)**
   What: NESO analysis examining the potential scale and role of biomethane across the energy system through to 2050.
   Why it matters: Highlights biomethane's potential contribution to decarbonisation, security of supply, dispatchable power and hard-to-electrify sectors. https://www.neso.energy/document/384986/download

3. **National Hydrogen Backbone Study (AFRY for NESO) (Jul 2026)**
   What: Independent study exploring the potential role and value of a GB hydrogen network.
   Why it matters: Suggests hydrogen infrastructure could provide wider system benefits through increased flexibility and integration of low-carbon energy sources. https://www.neso.energy/document/385061/download

4. **Early View of Winter Outlook 2026/27 (Jun/Jul 2026)**
   What: NESO's initial assessment of electricity security of supply for Winter 2026/27.
   Why it matters: Indicates electricity margins remain adequate but reinforces the ongoing importance of gas-fired generation and wider energy system resilience https://www.neso.energy/document/383451/download

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Key Publications (July - Sept)

1. Clean Flexibility Roadmap: July 2026 Update (DESNZ, Ofgem & NESO)
What: Progress update on delivery of the Clean Flexibility Roadmap and actions to enable a more flexible energy system.
Why it matters: Reinforces the growing role of flexibility, storage, hydrogen and demand-side response in supporting a decarbonised energy system. https://assets.publishing.service.gov.uk/media/6a50fce4a4890e65cce64d07/clean-flexibility-roadmap-2026-update.pdf

2. Ofgem Energy Networks Ring-Fence Review Consultation (Jul 2026)
What: Consultation on the regulatory framework governing energy network companies.
Why it matters: Could influence future investment, financing and governance arrangements across gas and electricity networks.
https://www.ofgem.gov.uk/consultation/energy-networks-ring-fence-review-statutory-consultation

3. Biomethane Distributed Entry Reinforcement Consultation (Ofgem, Aug 2026)
What: Consultation on modifications to gas transporter licence arrangements for biomethane connections.
Why it matters: Supports consideration of how network access arrangements may evolve as biomethane deployment increases.
https://www.ofgem.gov.uk/consultation/modifications-special-condition-321-gas-transporter-licence-biomethane-distributed-entry-reinforcement

4. Gas system connections and access arrangements: Call for Input (Ofgem, Sept 2026)
What: call for input on existing gas connections and access arrangements in the context of better strategic planning
Why it matters: Reflects increasing regulatory focus on how gas networks adapt to changing patterns of demand and strategic planning requirements. https://www.ofgem.gov.uk/call-for-input/gas-system-connections-and-access-arrangements-call-input

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Headline Report: Code Updates July - Sept

- National Gas has raised UNC0945R '**Review of NTS Access Arrangements**' which has progressed to a review group for 18 months.
- Ofgem published the 2nd **SDS** Energy codes: Strategic Direction Statement | Ofgem.
- **Correla**, who support Xoserve in the provision of the systems and services in their role as the Central Data Service Provider, has been sold to Esyasoft. Conversations are ongoing into any conflicts of interests with other services Esyasoft already provide.
- Following Ofgem's rejection of UNC0923 'Disapplication of TPD Section D7 (DSR Options) for 2026 only' NGT launched the **DSR tender for 2026**.
- Ofgem have issued an RFI for UNC0903 'The Introduction of a Single NTS Capacity Reference Price'; their **expected decision date** has been pushed back to Feb 2027.
- Ofgem have held small working group sessions on the **Gas Network Code** prior to formal industry engagement on code consolidation (consolidating the IGTUNC with the UNC).
- Membership of the **Hydrogen Network Code** advisory group has been confirmed by DESNZ although no start date has been confirmed.
- Following an industry call with Ofgem, **0937R - Aligning LDZ Charges with Actual Gas Usage for All Customers** has progressed to a review group for 24 months. The first workgroup, in September, set out the scope and the type of analysis to be included.

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Molecule Consultations

Title	Issued By	Issued	Deadline
Energy Networks Ring-fence Review Statutory Consultation	Ofgem	01/07/26	12/08/26
Modifications to the RIIO-3 Biomethane Connections UIOLI Governance Document	Ofgem	06/07/26	20/07/26
MOD0926S Maintenance criteria for Emergency Contact data held in Central Systems	JO	17/07/26	06/08/26
MOD0927S Moving the Market Participant Identity Verification Approach Document out of the UK Link Manual and into the CDSP Service Document – Contract Management Arrangements	JO	17/07/26	06/08/26
Code manager standard licence changes: data best practice	Ofgem	23/07/26	10/09/26
Proposed modifications to National Gas Transmission's Baseline Network Risk Outputs following Asset Health Re-opener	Ofgem	23/07/26	24/08/26
Modifications to Special Condition 3.21 of the gas transporter licence - Biomethane Distributed Entry Reinforcement	Ofgem	10/08/26	07/09/26
Statutory consultation on modifications to Independent Gas Transporter licence conditions for the Relative Price Control	Ofgem	14/08/26	11/09/26

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Molecule Consultations

Title	Issued By	Issued	Deadline
UK Emissions Trading Scheme: free allocation rules for hydrogen production – targeted technical consultation	DESNZ	07/09/26	02/10/26
0943S - Extension of the End Stop Date for the H100 Fife Project	JO	17/09/26	05/11/26
0944S - Proposal to remove obsolete clauses from TPD Section V 5.10 & Annex V-2, and V 5.11 & Annex V-3 of the UNC	JO	17/09/26	22/10/26
Gas system connections and access arrangements: call for input	Ofgem	24/09/26	21/10/26

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Gas Advisory Notes

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Gas Advisory Notes

As raised in 07 GAC, Gas Advisory Notes are continuing to be developed as a mechanism to raise and discuss industry perspectives with NESO. Following todays discussion, Gas Advisory Notes will be added to the next edition of the Terms of Reference for the second membership term of the GAC.

Areas for discussion:

- The process for raising Gas Advisory Notes including reaching consensus, governance and logistics
- The feedback loop for Gas Advisory Notes (eg how NESO will respond)
- Any concerns or further questions

Gas Security of Supply Assessment

Owen Hind

Some slides have been redacted from this section due to the upcoming publication of the GSSA.

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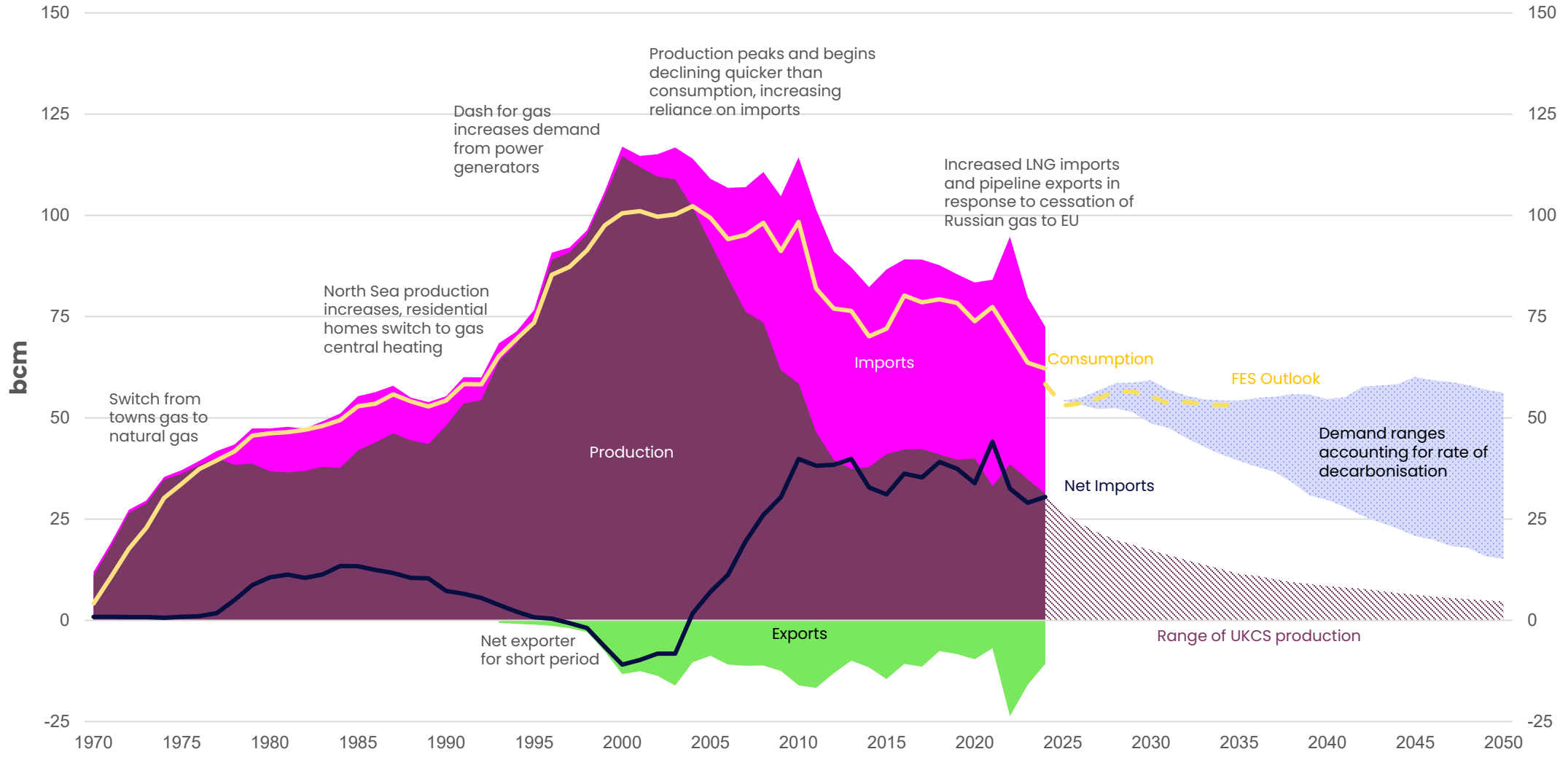
A Changing Context



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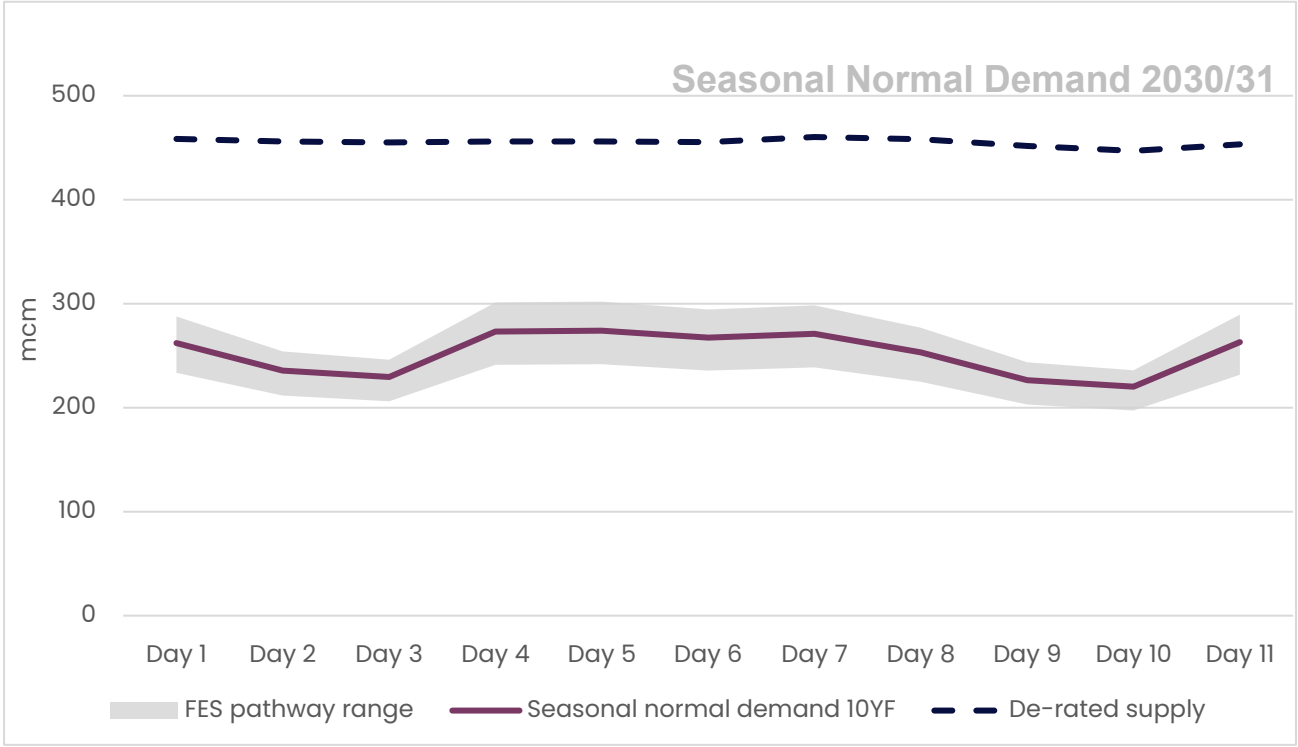
NESO tested future demand against three demand conditions

Our messaging focused on the analysis of future margins:

- In 2030/31 10YF, we expect a positive margin (+182 mcm) under seasonal normal conditions
- Across all FES pathways, the equivalent margin range is +163 to 211 mcm

Sufficient gas supply expected under seasonal normal weather conditions.



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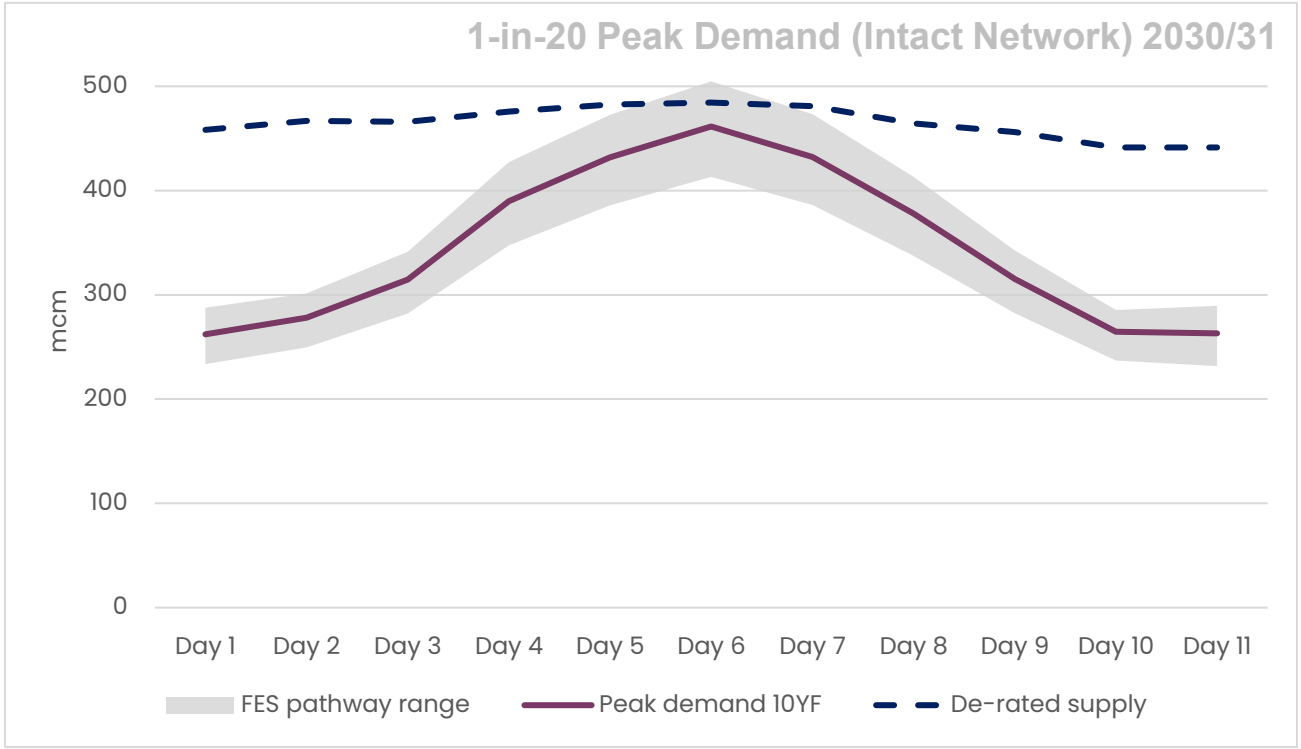
Margins: 1-in-20-Year Cold Snap

In 2030/31 10YF, margins are positive but narrow (+23 mcm), leaving system vulnerable to supply disruptions (historical outages >23 mcm)

Across FES NZ pathways, the equivalent margin range is +60 to 73 mcm

For Falling Behind, a negative margin (-20 mcm) indicates supply shortfall risk



Cold snaps significantly tighten margins; resilience depends on decarbonisation progress and intact supply network.

Public

Margins: N-1 Reduced Supply

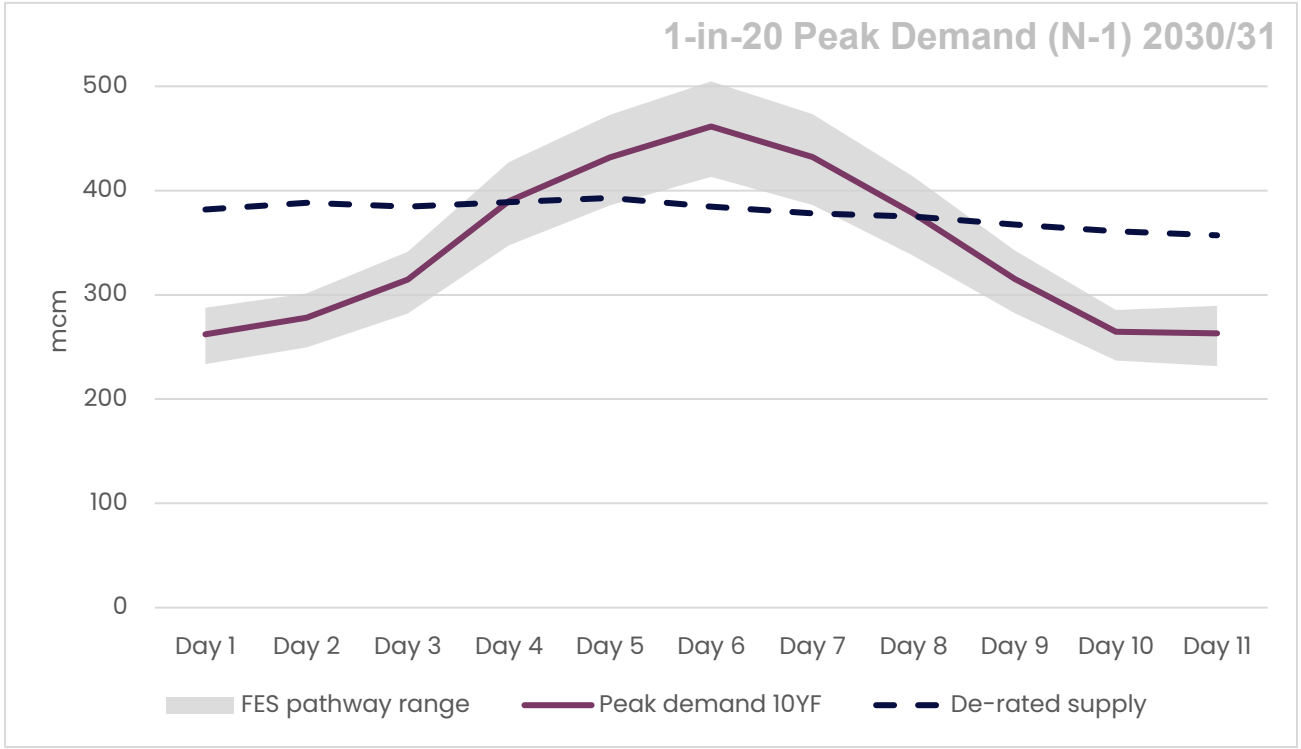
For seasonal normal conditions, demand still met under N-1; risk arises during cold snap

In 2030/31 10YF, negative margin of -76 mcm (-57 mcm in 2035/36)

For NZ pathways, lower peak demands improve margins but still fail N-1 in 2030/31 (e.g. Holistic Transition: -16 mcm)

By 2035/36, margins turn positive under NZ pathways but still fail N-1 for 10YF and Falling Behind

N-1 failure is not limited to major outages; smaller or combined losses could also compromise security of supply



What's coming for the second publicaton?

- DESNZ jointly published the Gas System in Transition, Security of Supply consultation which closed in February. An interim response was published this August, which committed to setting out security of supply options 'in due course'.

- Considerations for upcoming submission and additional work this autumn:
  - How the risk has evolved
  - Likelihood and outcome of risk
  - Shorter term v enduring solutions for the gas system
- Considering how NGT's proposed supplementary security standard to the N-1 test could be developed and implemented

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Lunch

GAC Membership

Membership review: where we are now

Process launched

06 GAC
May 2026

Membership update process introduced and expressions of interest opened.

Reminder issued

07 GAC
June 2026

Members reminded to submit an expression of interest.

Further reminder

07 GAC Minutes
July 2026

Members reminded to submit an expression of interest.

EOI closed

08 GAC
October 2026

Expressions of interest are now closed and responses are being reviewed.

2nd Membership Term starts

09 GAC
January 2026

New membership term and ToR commences

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How will membership be reviewed

01

Contribution

Attendance and active participation in Council meetings.

02

Representativeness

Ability to reflect the wider constituency view, rather than a single company position.

03

Breadth of perspective

Coverage across the gas value chain and connected markets, recognising that constituencies hold multiple viewpoints.

04

Future needs

Skills and knowledge required for the programme of work expected to continue into 2027/28.

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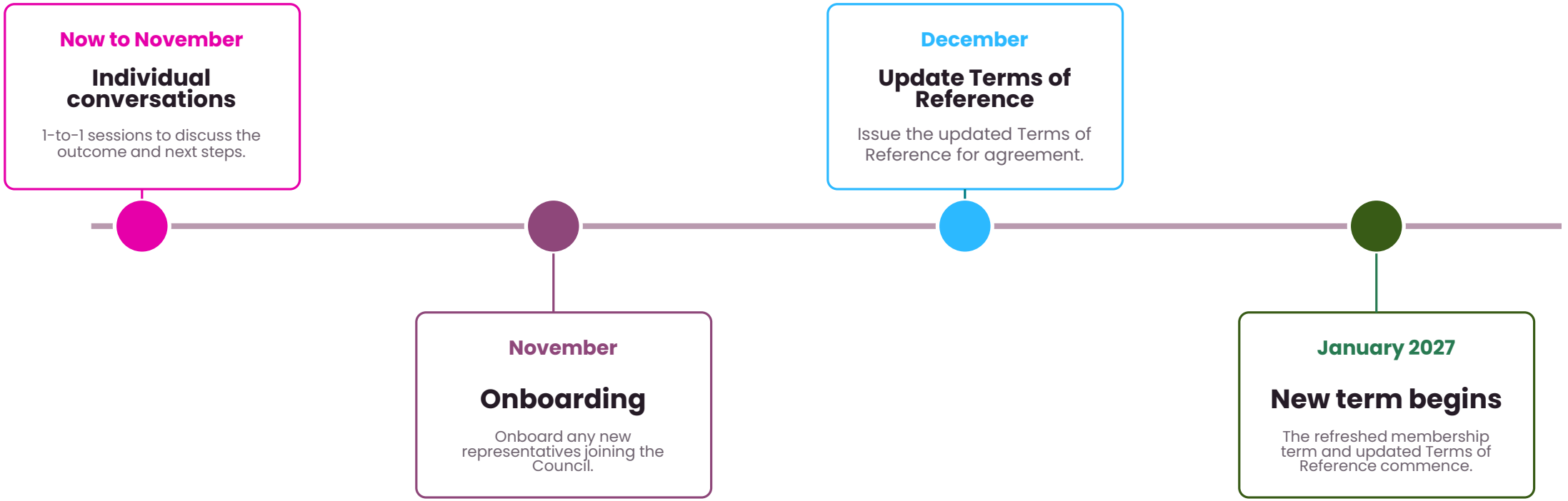
What happens next

A clear route from review to the start of the new membership term



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GAC Terms of Engagement Change

Time	Focus	Format
10:00-12:00	**GAC Led Strategic Discussion: sector perspectives and emerging challenges**	Each meeting focuses on a Gas Market Roadmap theme (e.g. Gas Market Transition, Market Resilience, Emerging Markets). Selected GAC members provide short perspectives on developments, opportunities and challenges within their sector. Facilitated discussion follows, supported by framing questions from NESO to explore implications for the wider market.
		Networking Lunch
13:00-13:30	**Policy and regulatory outlook**	Policy and regulatory outlook to be led by the relevant parties where possible. Opportunity for questions and discussion.
13:30-14:30	**NESO Tell: Gas Market Roadmap delivery update**	Update on progress across Gas Market Roadmap workstreams, emerging findings, key decisions and areas where stakeholder input is sought.
14:30-16:00	**NESO Tell: Gas programme insights and discussion**	Updates on major NESO initiatives and publications, including GSSA, SSEP, RESP and GOA. Discussion focused on implications for gas markets, areas of alignment and opportunities for collaboration across the sector.

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EMAC Updates

Lizzie Blaxland

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Agenda

Item	Lead	Time
Informal lunch and networking (optional)		12:00 – 13:00
Introductions		
Welcome, introduction and update on last meeting's agenda items	Monica Collings (Chair) Rebecca Beresford, Lizzie Blaxland (NESO)	13:00 – 13:10
NESO's Councils Structure	Vicki Mustard (NESO)	13:10 – 13:20
For discussion		
NESO's 10-Year Outlook	Jenny Mills, Grace Carter (NESO)	13:20 – 14:20
Break		14:20 – 14:35
General updates		
Wholesale CfDs	Matt Trayner (DESNZ)	14:35 – 14:50
Day-Ahead NTC Restrictions and NESO Trading	Simon Williams (NESO)	14:50 – 15:10
For discussion		
Balancing Cost Report and Constraints Modelling	Izzie Sunnucks (NESO)	15:10 – 15:40
Forward work plan and close		15:40 – 15:50

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NESO's Councils Structure

Vicki Mustard (NESO)

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NESO Advisory Engagement

ISG (Independent Stakeholder Group)

ICP (Independent Customer Panel)

RESP (Regional energy System Planning) strategic boards

RESP (Regional Energy System Planning) working groups

RNP (Reformed National Pricing) IEP (Industry Expert Panel)

Electricity Markets Advisory Council

Technical Advisory Council

Gas Advisory Council

Engineering Advisory Council

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NESO's 10-year Outlook

Questions for the Council:

Feedback on 2026 10-year outlook: Do the electricity demand and supply projections published in the 2026 10-year outlook seem credible?

Recent developments: What recent developments are you aware of that could change the trajectory of electricity demand and supply over the next 10 years?

Uncertainties: What do you see as the key areas of uncertainty which will impact on electricity demand and supply projections over the next 10 years?

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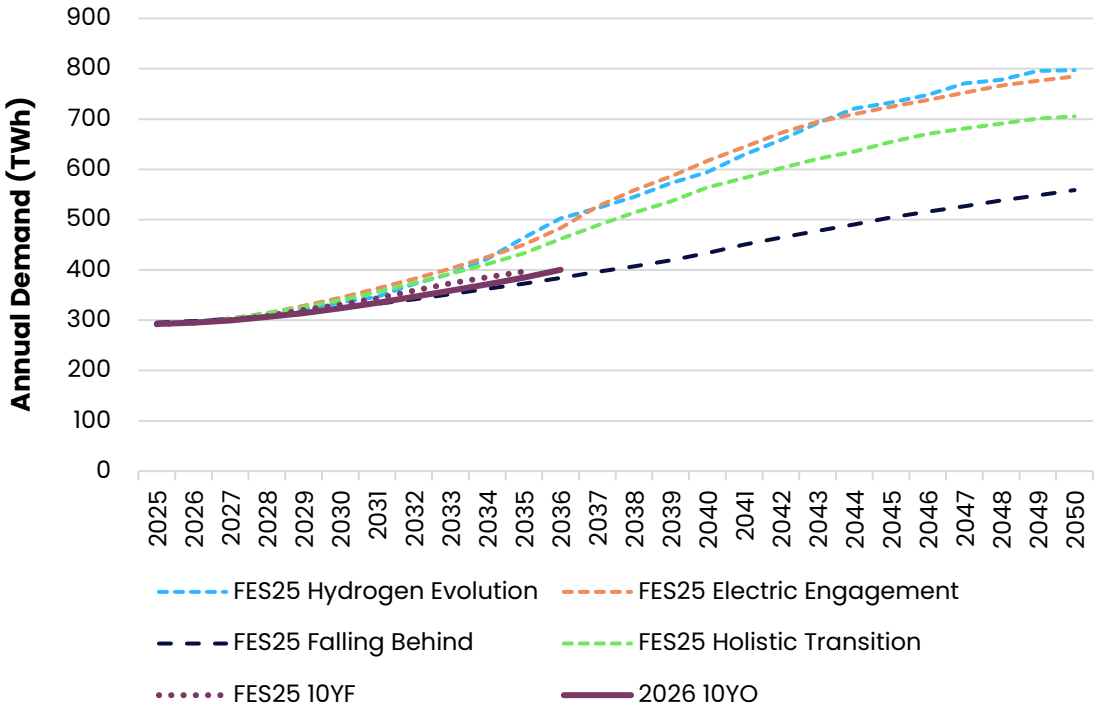
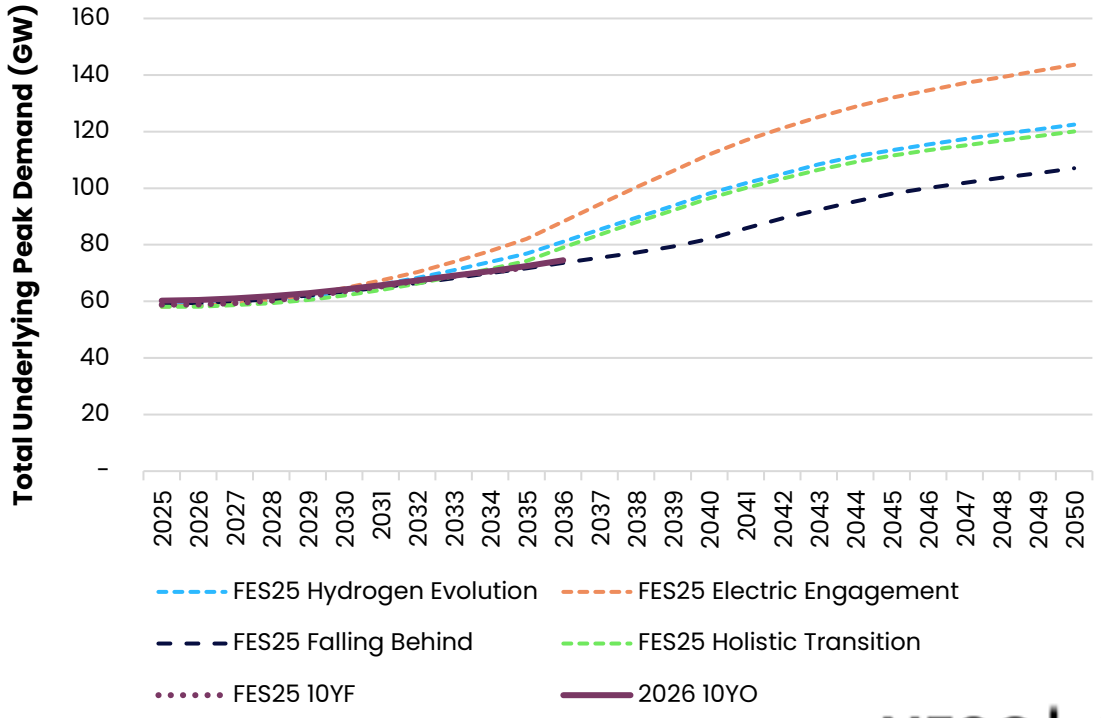
Context: 10YO vs FES Pathways

Differences in electricity demand between the 2026 10YO and pathways primarily stem from the rate of adoption and electrification e.g. 2026 10YO has slower rates of EV and heat pump adoption than outlined in FES25 pathways, leading to slower growth in electricity demand.





Use of DA NTC restrictions on Interconnectors

- NESO has access to mechanisms to restrict the ***Day-Ahead (DA)*** capacities of some GB interconnectors via ***Net Transfer Capacity (NTC)*** restrictions.
- The interconnectors with DA NTC mechanisms available are ***North Sea Link (NSL)***, ***Viking Link***, ***Nemo Link*** and ***ElecLink***. The other interconnectors do not have the mechanism available.
- NESO started using DA NTC restrictions more regularly from the ***operational day*** of ***Friday 24th July 2026*** *(operational day started at 23:00 on Thurs 23rd July 2026)*
- DA NTC restrictions may be required to guarantee the security of the GB system, should available intraday options not provide this certainty.
- The calculation of restrictions will be according to available day-ahead forecasts and resulting plans of GB system conditions at the time of calculation *(as has always been the case to date for Intraday NTC restrictions)*.
  - Should these conditions change as timescales develop, any newly available capacity will be released in intraday timescales.
  - As timescales progress to intraday, further restriction mechanisms become available on IFA, IFA2 and BritNed (Intraday Trading Limits – ITLs). To ensure continued fairness, NESO will at this stage re-calculate the application of the required restricted volume, taking account of the additional mechanisms available to ensure the restrictions are still applied equitably across all available interconnectors.
- Fairness – restrictions to DA capacity will be applied equitably across all available interconnectors.
  - Equitably means that the total restriction would be spread across all those interconnectors which can provide the required level of security, according to the capability of each interconnector declared at the 2-day-ahead stage.
- Transparency – restrictions submitted by NESO will be publicly available on the Interconnectors section of NESO's Data Portal
- Any compensation for NTC restrictions applied by NESO will be made in accordance with the Methodology for GB Commercial Arrangements relating to Interconnector Capacity Calculation, available on the NESO website.
- For more detailed information on:
  - NTC and ITL restrictions, please see NESO's previous OTF interconnector deep-dive, available on the NESO OTF webpages (slides 28-30 from OTF on 5th March 2025);
  - How NESO calculates NTC restrictions, the factors considered and explanation of system security relating to NTCs, please see NESO's GB NTC Calculation Policy, available on the NESO website;

Gas Market Roadmap Feedback

NESO Update

July 2026

Gas Market Roadmap Published

NESO's first gas market roadmap published alongside AFRY and Biomethane reports

August 2026

Project Scoping and Planning

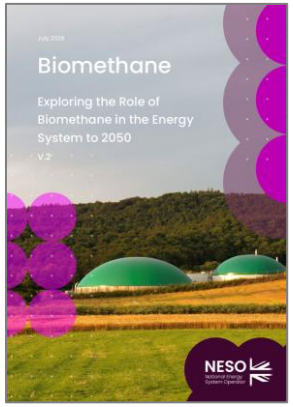
Initial view of areas for further work and timeline look ahead

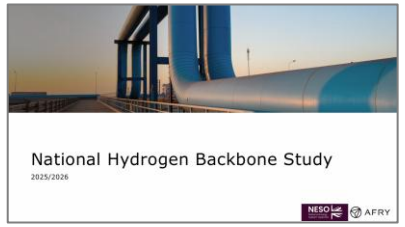
October 2026

08 GAC

GAC feedback on the GMR and sharing progress updates







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Gas Market Roadmap Feedback and Next Steps



- What did the roadmap do well? How are you using it?
- What would you like to have seen more on?
- How could NESO improve future roadmaps?

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GMR What Comes Next

GMR 1
2026
Initial baseline

- NESO's first Gas Market Roadmap Publication
- 3 Central Challenges
- 7 areas for further work

Interim
Evidence gathering and further work

- NESO project reports (where appropriate)
- Working with the GAC to gather evidence and further feedback from market stakeholders
- Industry, policy and regulatory development tracking

GMR 2
2028
Updated forward looking roadmap

- Report on progress on the areas for further work
- Evidence reports on wider industry, policy and regulatory across the 3 central challenges
- Reviewing the central challenges and future areas of work

GMR Projects

GMR Projects – terms of engagement

Previous approach

Intensive, project-based working groups

- Dedicated groups for priority projects, including hydrogen blending and biomethane
- Workshops and meetings throughout project development
- GAC members helped shape scope, evidence and outputs

High level of ongoing member involvement

Going forward

Informed, transparent and targeted engagement

- NESO will lead and deliver projects, keeping the GAC informed
- Regular updates on progress, emerging evidence and findings at the GAC meetings
- Targeted input from relevant individuals or groups where it adds value

No standing project working groups by default

What will not change: the GAC will continue to receive visibility of the work and opportunities to challenge, advise and connect NESO with relevant expertise.

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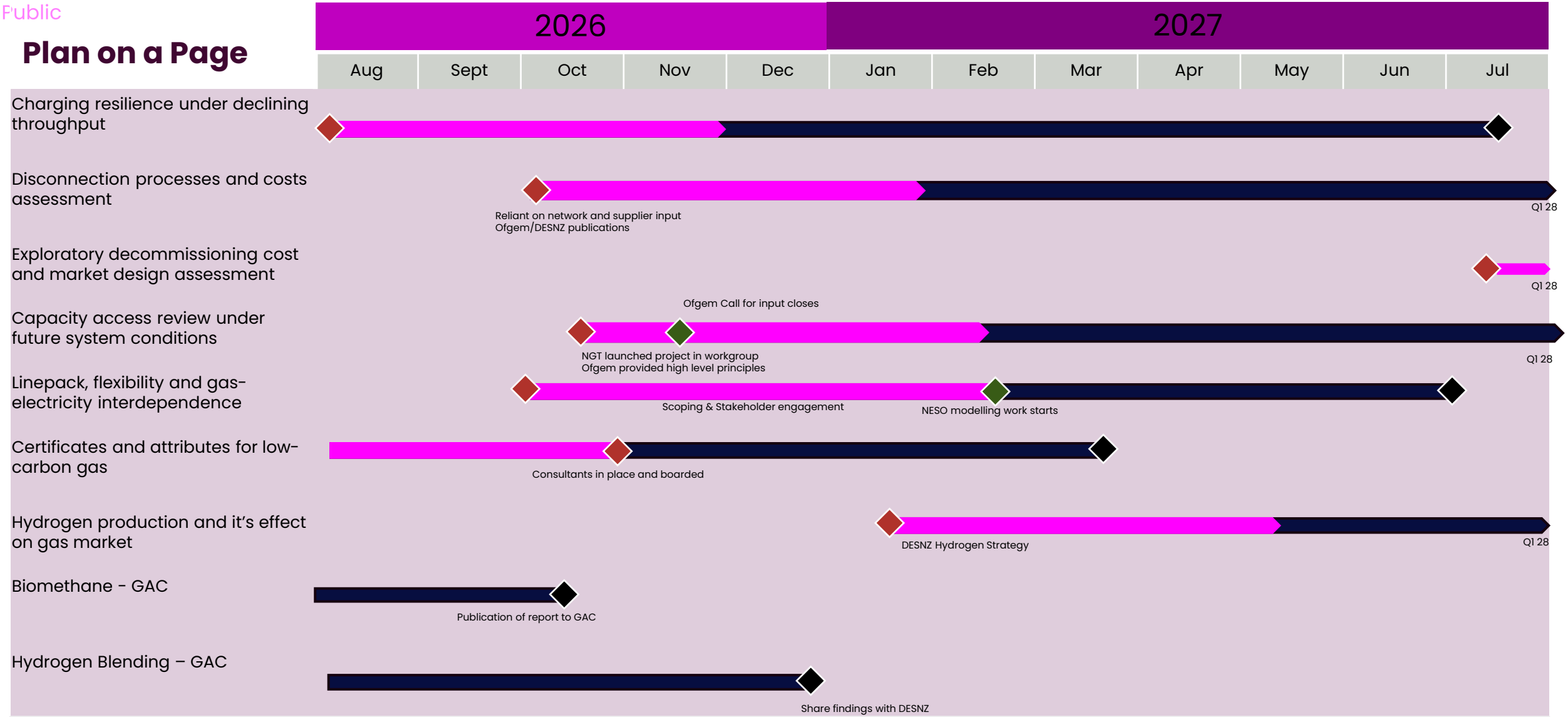
Plan on a Page



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Gas Market Transition

Project	Start date	Project Summary	Status
Charging resilience under declining throughput	Aug 26	Gas demand is projected to decline, which could place pressure on existing gas charging and cost-recovery frameworks. Fixed costs may need to be recovered from a smaller or changing user (and consumer) base, creating affordability and investability questions. This project provides an evidence-led stress test of the current framework against future gas-demand pathways.	Scoping phase underway – seeking to expand beyond networks to wider market participants, have begun specific engagement with some GAC members
Disconnection processes and costs assessment	Sept 26	As gas demand changes and heat-transition pathways develop, gas disconnections may become more material in volume, cost and delivery complexity. Current processes were not designed for large-scale or spatially concentrated transition. This project builds the evidence base on current routes, cost drivers, consumer impacts and links to whole-system planning.	Scoping phase underway but will include direction from Ofgem's final disconnections report
Exploratory decommissioning cost and market design assessment	July 27	Future decommissioning or repurposing decisions are highly uncertain and dependent on heat pathways, enduring gas use, hydrogen, biomethane, CCUS and electricity readiness. This project is about active preparation: building evidence on costs, triggers, sequencing and role clarity prior to any decommissioning analysis or decisions.	To be commenced later in cycle (July 27)

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Market Resilience

Project	Start date	Project Summary	Status
Capacity access review under future system conditions	Aug 26	Changing demand and supply patterns may alter where, when and how GB gas capacity is valued and accessed. Efficient capacity booking and infrastructure access arrangements support liquidity, competition and infrastructure confidence. This project tests whether current arrangements remain efficient, transparent and resilient under declining demand, greater variability and increasing import dependence.	Review launched at October Transmission Workgroup; Ofgem published Call for Input on Access and Connections
Linepack, flexibility and gas-electricity interdependence	Oct 26	While gas markets are fit for purpose to meet CP30, there is a question as to whether they will remain fit post 2030 given that gas fired power generation is expected to be more dispatchable. This could lead to intra-day requirements that the current gas network/market is not designed for.	Scoping phase underway – modelling to commence in March
Previous Cycle GAC Projects			
Gas Storage - GAC	Project retired	Project exploring the value of gas storage in the UK.	Project will be retired as per GMR with DESNZ owning strategic direction on supply sources
SIF Projects			
Data centre SIF project	Aug 26	SIF project lead by Cadent, NESO partnering on how gas fired generation for data centres, could be accessed once they get a grid connection.	On track – due to start in feb

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Emerging Markets

Project	Start date	Project Summary	Status
Certificates and attributes for low-carbon gas	Aug 26	Certificates and attributes can affect investment signals, consumer claims, settlement, trading and compliance. Low-carbon gas market architecture needs to connect hydrogen, biomethane, UK ETS and wider decarbonisation markets. This project maps dependencies and use cases without making NESO the scheme owner.	Scoping phase – currently out for consultant tender
Hydrogen production and it's effect on gas market	Jan 27	Hydrogen production and usage may have a number of different impacts on the gas network. This project aims to understand what the impact of hydrogen production or usage may be on the gas market, and how gas market arrangements may need to change to reflect this.	on hold – waiting for the DESNZ hydrogen strategy before commencing detailed scoping phase
Previous cycle GAC			
Biomethane - GAC	Jan 26	Project exploring post GGSS support mechanisms	Project complete – for distribution
Hydrogen Blending – GAC Phase 2	Aug 26	Hydrogen blending impacts on end users to support DESNZ decision making. Following initial GAC workshops to identify focus area's this has been validated with DESNZ for short sprint	High level work underway
SIF Projects			
Biomethane SIF Project	Sept 26	SIF project focussed on trusted data infrastructure for low carbon gas markets (biomethane)	TBD – subject to Lead Partner being identified

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Strategic energy planning update

SSEP Pathway Options Report

Robert Gibson
SSEP Senior Analysis Manager

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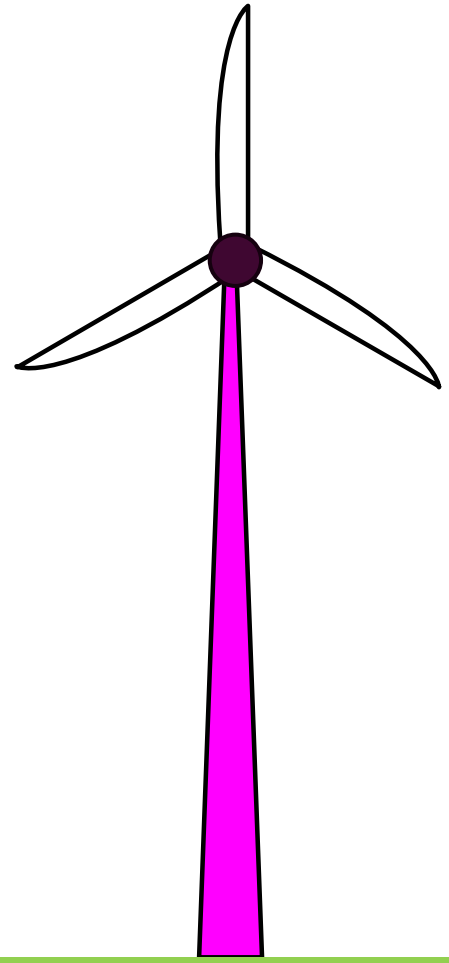
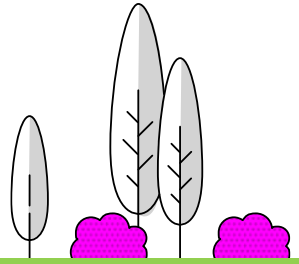
Strategic Spatial Energy Plan (SSEP)

The SSEP will accelerate clean, affordable and secure energy through greater certainty.

The plan will assess the best locations for generation and storage of electricity and hydrogen on a zonal basis.

This will provide a government and Ofgem-endorsed plan that firmly sets the context for the nation's energy requirement.





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What the SSEP will consider

- Community/societal views
- Decarbonisation targets
- Economic costs
- Environmental protection
- National priorities
- Network needs and operability
- Other sea/land uses
- Practical delivery
- Secure supply



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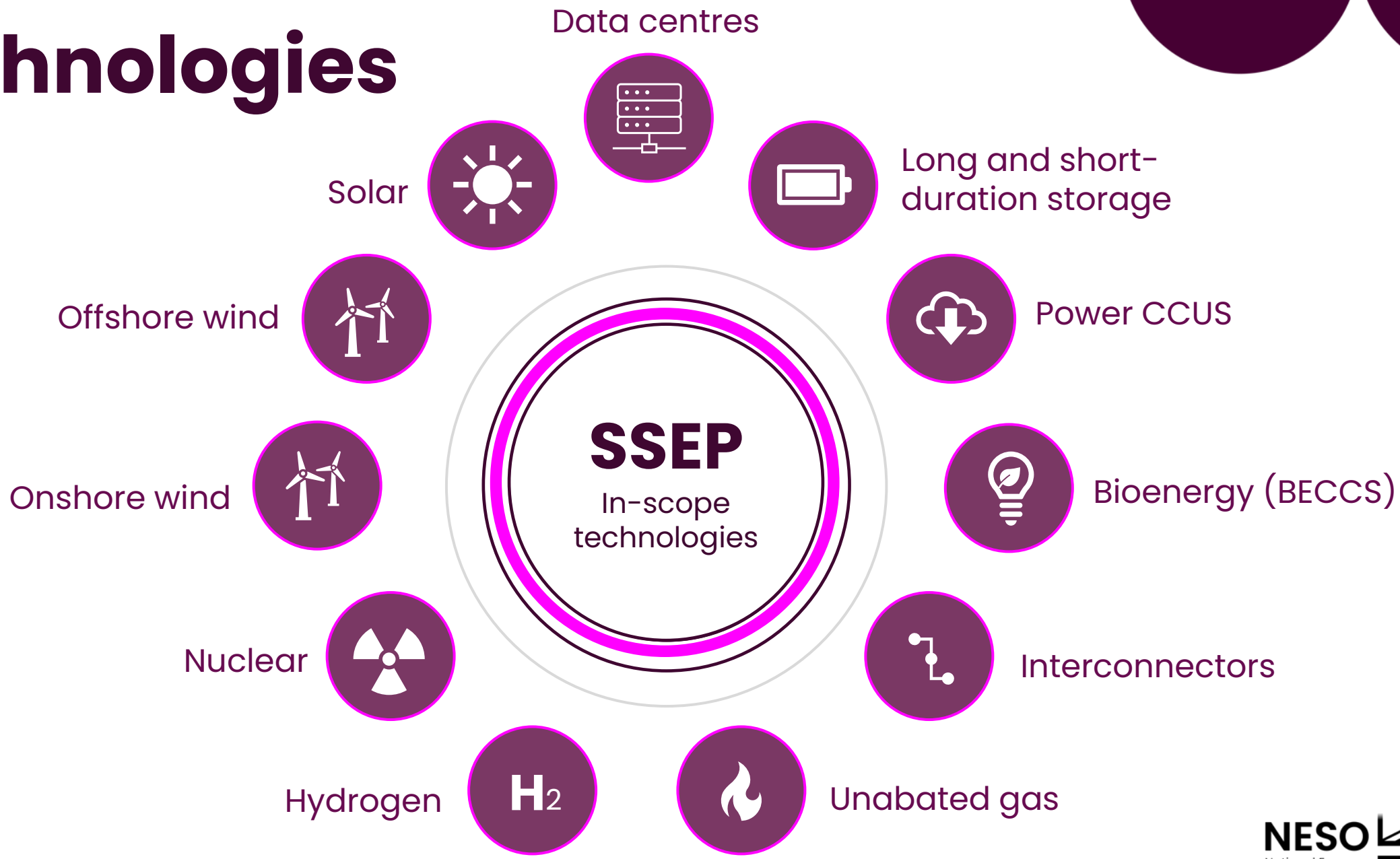
Technologies



Public
Public

Delivery

Prepare → Model → Appraise → Consult → Refine → Publish

Stakeholder engagement

Environment

Assurance

Governance

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Pathway Options Report submission

Submitted to co-commissioners in August 2026.
The most significant milestone for spatial energy planning to date.

Six pathways	For ministerial decision-making	Independent and evidence-based	Preferred pathway to consultation
• To deliver future energy needs • Meet security of supply standards and align with legally-binding carbon budgets	• Confidential report to support ministerial decision-making • Information on pathway options to be published in our future publications	• Independent of government and commercial interest • Years of evidence, analysis and stakeholder engagement	• UK Energy Secretary selects preferred pathway, with Scottish and Welsh government advice • NESO consults on the pathway before publishing the first SSEP*

*Dates subject to the timing of the UK Energy Secretary's decision on the preferred pathway

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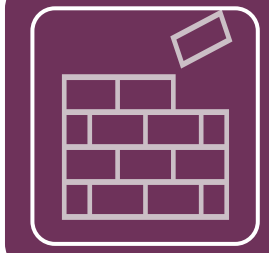
Key messages



Common foundation

All six pathways deliver a secure, net zero energy system and share a common direction of travel, including substantial renewable generation, network development, system flexibility and firm low-carbon generation.



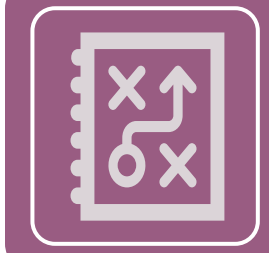
Every pathway has impacts

All pathways are deliverable, but none are without impact, reflecting different balances between cost, environmental, societal, spatial and delivery considerations.



Proceed with confidence

The common direction of travel across pathways provides confidence that many decisions can be progressed now, while preserving flexibility in areas where uncertainty remains.



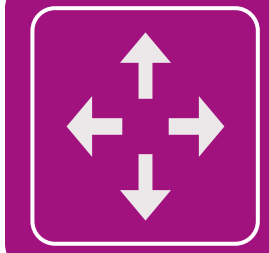
From strategy to delivery

The SSEP is a strategic plan that will be implemented through market, connection, and planning processes and will provide the strategic direction needed for network planning.



Strategic choices remain

Important strategic choices for government remain, particularly regarding the future role and scale of onshore renewables, offshore wind, and nuclear power, which will influence future costs, delivery risks and the range of available options.



Designed to evolve

A three-year refresh cycle will reflect developing evidence, maturing technologies and changing local, regional and national priorities.

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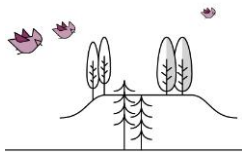
Breadth of engagement



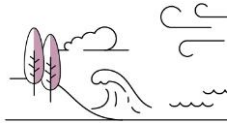
Energy Industry Working Group

Energy system and infrastructure expertise



Environmental Working Group

Environmental expertise and statutory consultation requirements



Land and Marine Use Working Group

Spatial planning, land use and marine use expertise



Societal Forums

Public views, values and sector-specific expertise



Community Representative Engagement

Public views, values and sector-specific expertise

Stakeholders shared different perspectives, challenged assumptions and built our evidence base.

Their evidence, alongside technical analysis means more robust, representative pathway options.

Supported by wider engagement

- Public webinars
- Energy Developer workshops
- Spatial assessment workshops
- Societal surveys
- Societal focus groups
- Strategic planning forums – 13 across GB

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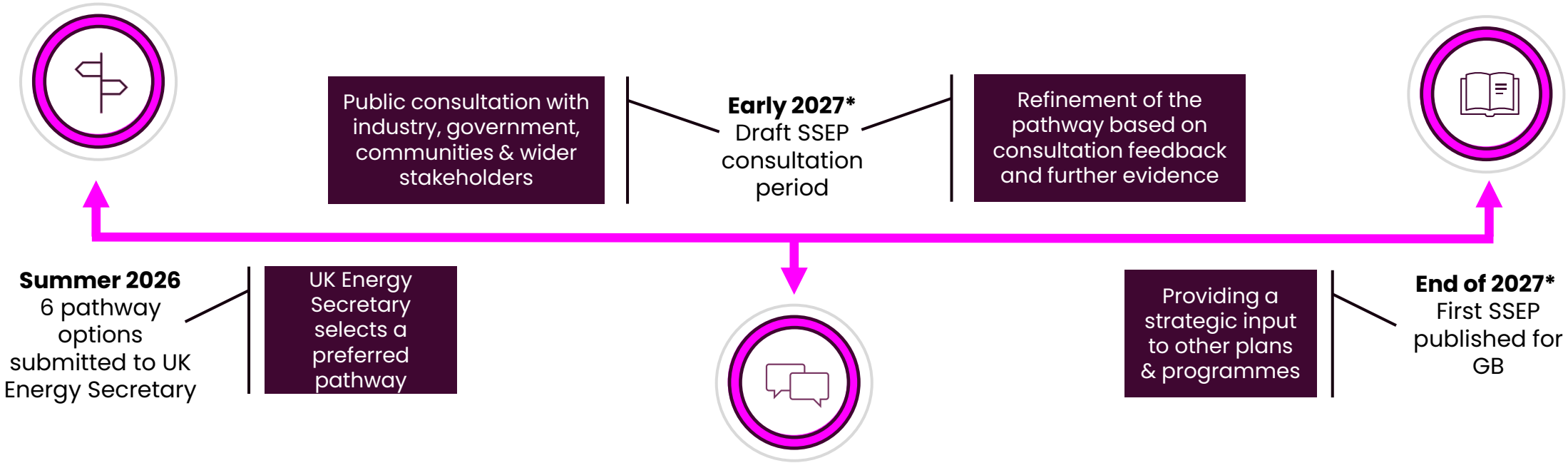
Beyond the Pathway Options Report: What's next for the SSEP?

The POR is the start of the next phase, not the end of the process. The selected pathway will be consulted on, refined, and used to inform future spatial energy planning.

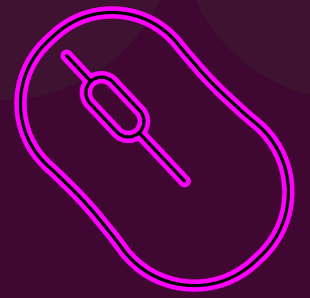


The SSEP pathway selected and consulted on, will help shape future Spatial Energy Planning, inform wider strategic energy system plans, and provide a key input into future network planning and investment decisions.

*Dates subject to the timing of the UK Energy Secretary's decision on the preferred pathway

Public
Public

Links to useful resources



NESO strategic energy planning links

Strategic energy planning: a summary

SSEP final methodology

SSEP final methodology appendices

CSNP methodology principles

External links

Clean Power 2030 Action Plan

Transmission Acceleration Action Plan

SSEP Commission from UK, Scottish and Welsh governments

Ofgem RESP page

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Investor Engagement: Cost of Capital

Anthony Belcher

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Setting the scene

System transformation is accelerating and capital remains available, but selective

The UK energy transition continues to attract global capital, but allocation is increasingly selective and dependent on **risk-adjusted returns**

Market reform is focused on improving operational efficiency, access, and transparency, with implications for revenue visibility and risk

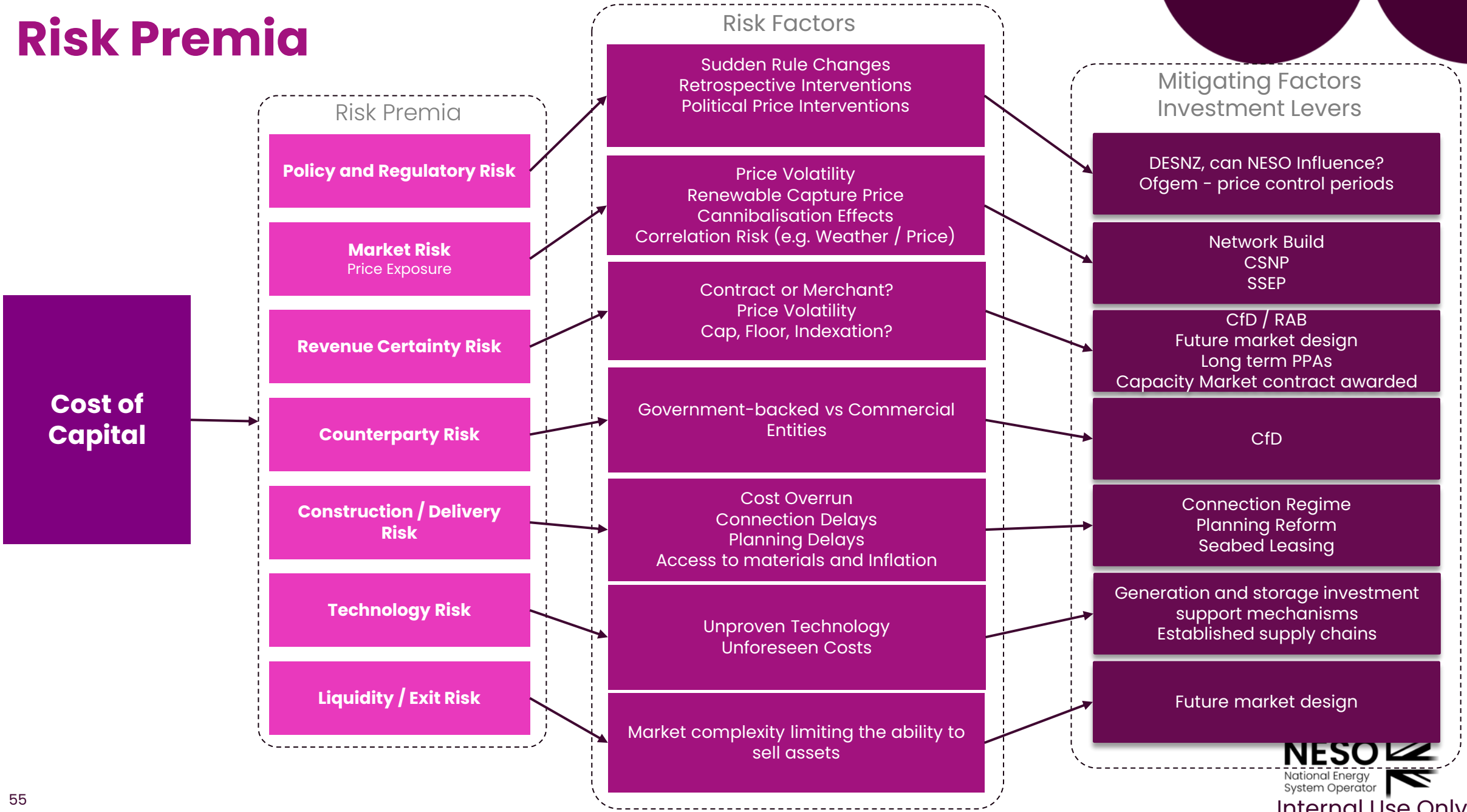
The core investment question remains:

Do market reforms materially reduce perceived risk premia and improve underwriting confidence?



Public

Risk Premia



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Internal Use Only

AOB - Energy Data Explorer

Grant Wilson


Thank you