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Achieving a triple-A grid: ambitious, affordable and accepted

Chaired by Susie Lind,
Partner, CMS

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Steve McMahon

Director for Network Price Controls

Ofgem

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ofgem
Making a positive difference
for energy consumers

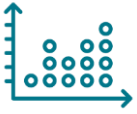
RIIO-3: Investing in our Energy Networks

Scottish Renewables Grid & Networks Conference, 26th February 2026

Most consequential price control we've ever set

- RIIO-3: 5-year spending plans to from April 2026 to March 2031
- Expanding the electricity transmission grid at an unprecedented scale and pace to ease constraints, get new generation and demand connected and insure against future gas price shocks
- Rigorously testing company plans for efficiency but ensuring funding is available to deliver essential investment
- Delivering an investible package with incentives targeted around major project delivery, faster connections, and innovation
- Higher returns for on-time delivery of infrastructure and improving customer outcomes

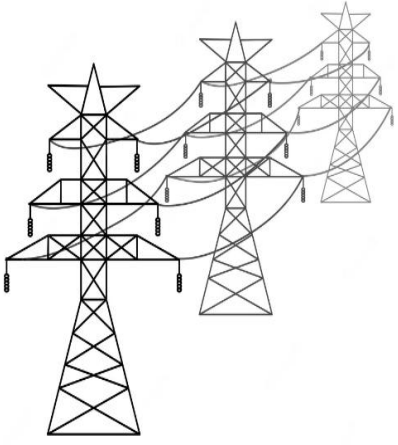
Clear approach to achieve Clean Power 2030, creating certainty on investment needs



Risk and reward balanced across the full T3 package

Ambitious but achievable targets to ensure on time, on budget delivery aligned with consumer interests

ET investment for clean power and energy security



- **Largest increase in capital spending** in history of the sector will enable 80 major infrastructure projects to be completed by 2030 - expanding Britain's grid at the fastest pace and scale since the 1960s
- Investment in new capacity alongside essential replacement of assets to ensure **world-class levels of reliability are maintained**
- Allowances of **£10.3bn now, potentially reaching £70bn** over the period (of which ~£40bn in Scotland)
- A range of **mechanisms to adapt allowances** in-period to reflect investment requirements as system needs and costs become clear
- Rolling over new **~£4bn Advanced Procurement Mechanism** and **ASTI regime**
- Funding arrangements operating alongside **strong new incentives** so that TOs are fully focussed on delivering essential infrastructure on time, getting customers connected promptly and deploying innovation to reduce project and system costs

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Sam Torrance

Head of Price Control Operations

SSEN Transmission

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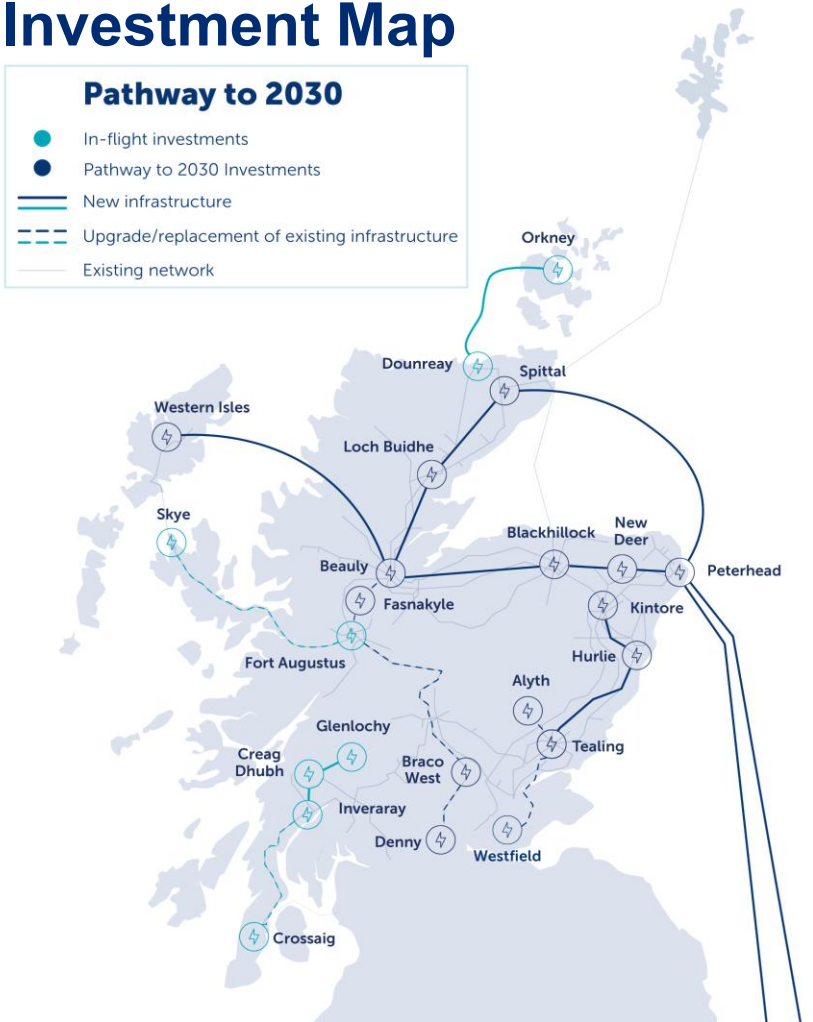
SSEN Transmission 2030 Investment Map



4 Key Delivery Enablers

PROCUREMENT

Early supply-chain engagement, long-term visibility, coordinated TO purchasing

PLANNING

Consenting timelines, predictability, community acceptance

PEOPLE

Scaling capability, skills, delivery leadership

REGULATORY SETTLEMENT (RIIO-T3)

Clarity, stability, flexibility to adapt as system needs evolve

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Craig McTaggart

Head of Transmission Network

SP Energy Networks

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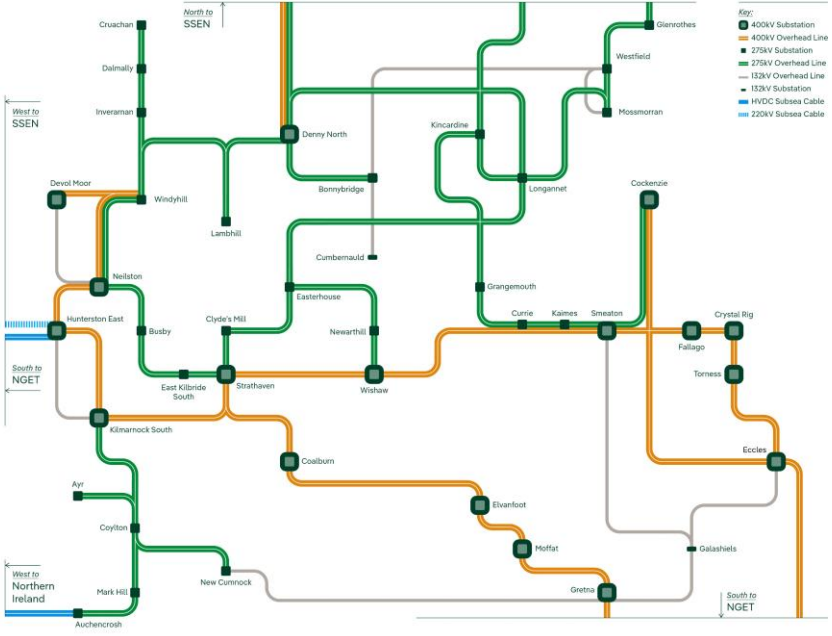
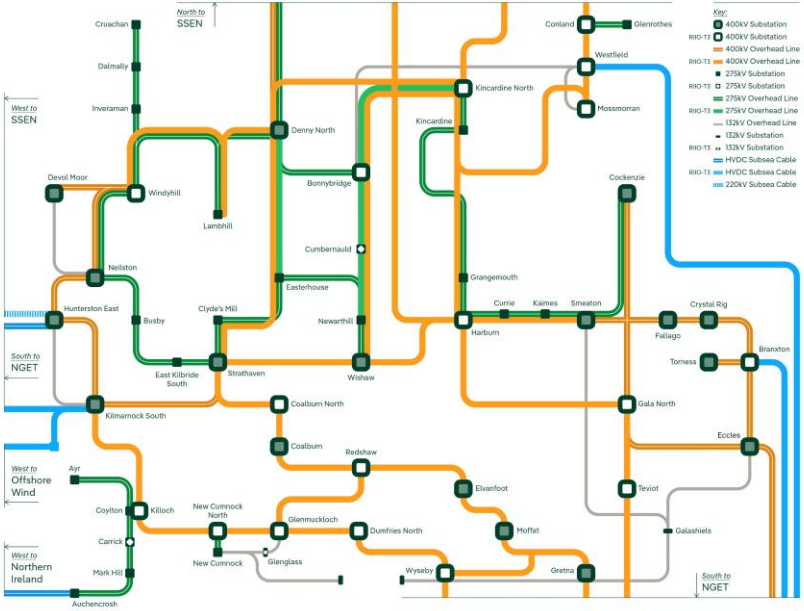
Our Network Vision for RIIO-T3

From the Network We Have



To the Network We Need



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Laura Fleming

Country Managing Director

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Mixed signals: the existential question of charging in a spatially planned system

Chaired by Claire Mack,
Chief Executive, Scottish Renewables

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Dr Simon Gill

Independent Energy Consultant

The Energy Landscape

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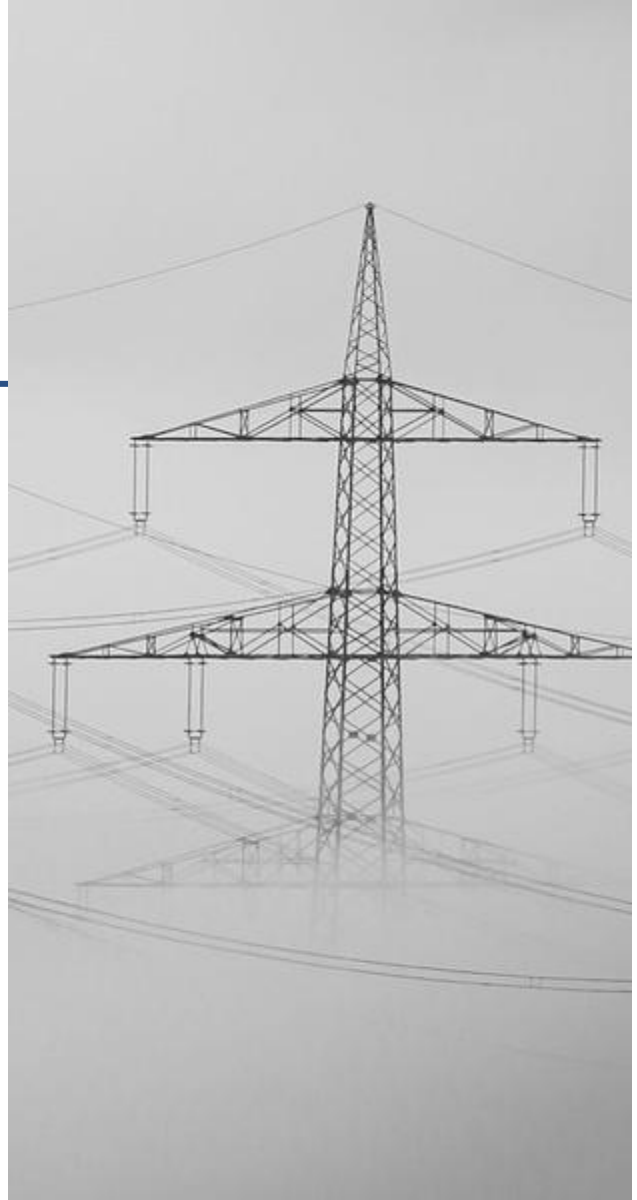
Transmission charging in Scotland:

Jeopardising Britain's Energy Transition

Scottish Renewables Grid Conference

26th February 2026

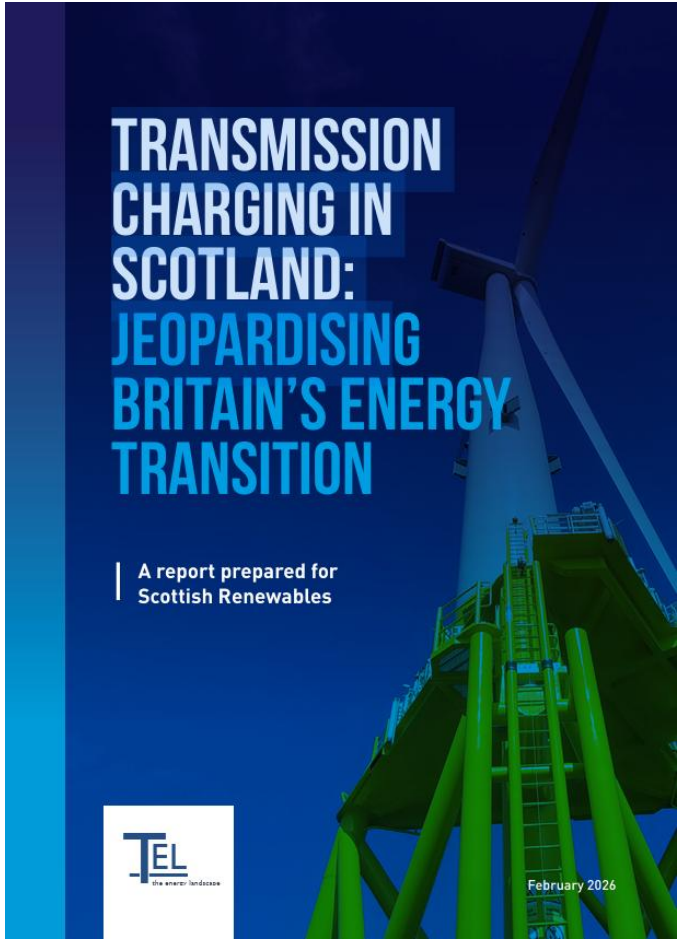
Dr. Simon Gill



simon@energylandscape.co.uk | @simon-gill-energy energylandscape.co.uk

V1.0

Report published by Scottish Renewables



"Delivering a clean electricity system depends on new renewable generation in Scotland, but Transmission Network Use of System (TNUoS) charges have long posed a challenge for Scottish generators. Today, the scale, uncertainty, and impact of these charges have increased significantly. They now represent a direct risk to Britain's energy transition."

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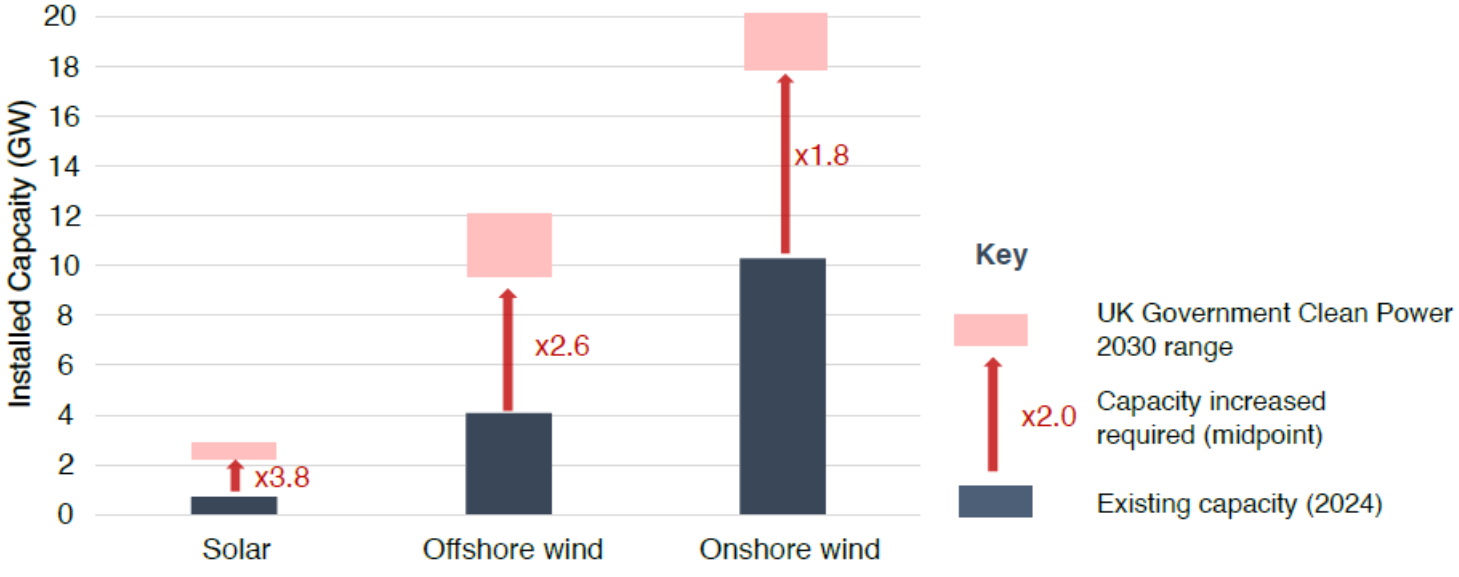
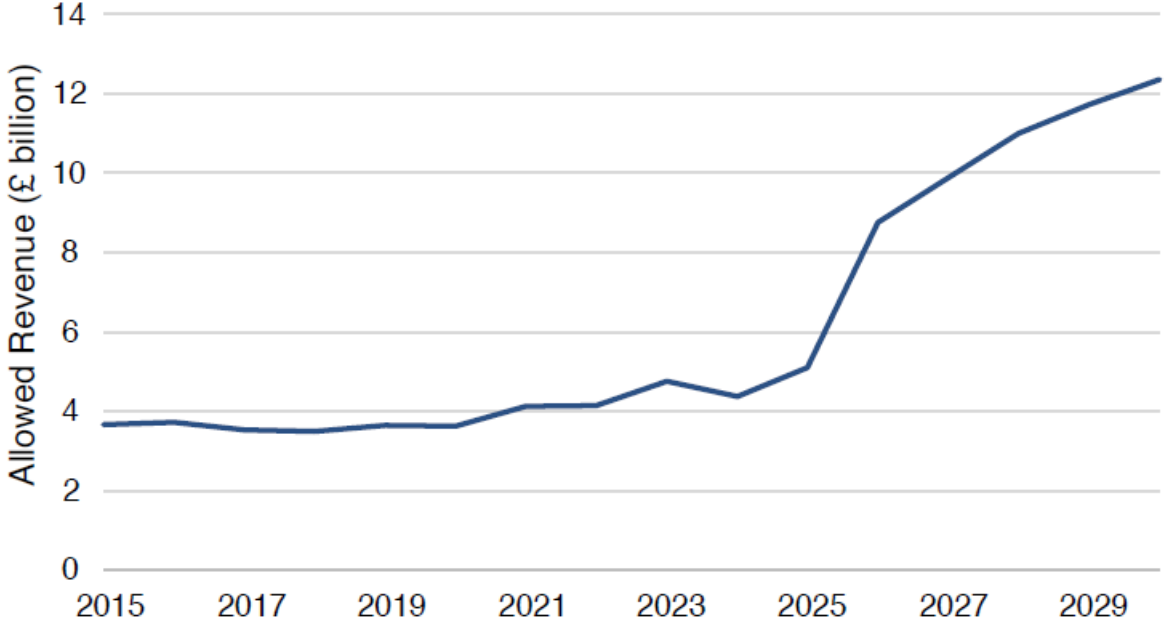
Why Scotland is important



The Scottish generation fleet needs to grow substantially to deliver Clean Power 2030

the energy landscape

The cost of transmission



The cost of transmission is growing, but this can be more than offset by a reduction in other cost elements as long as we get the investment needed in renewables.

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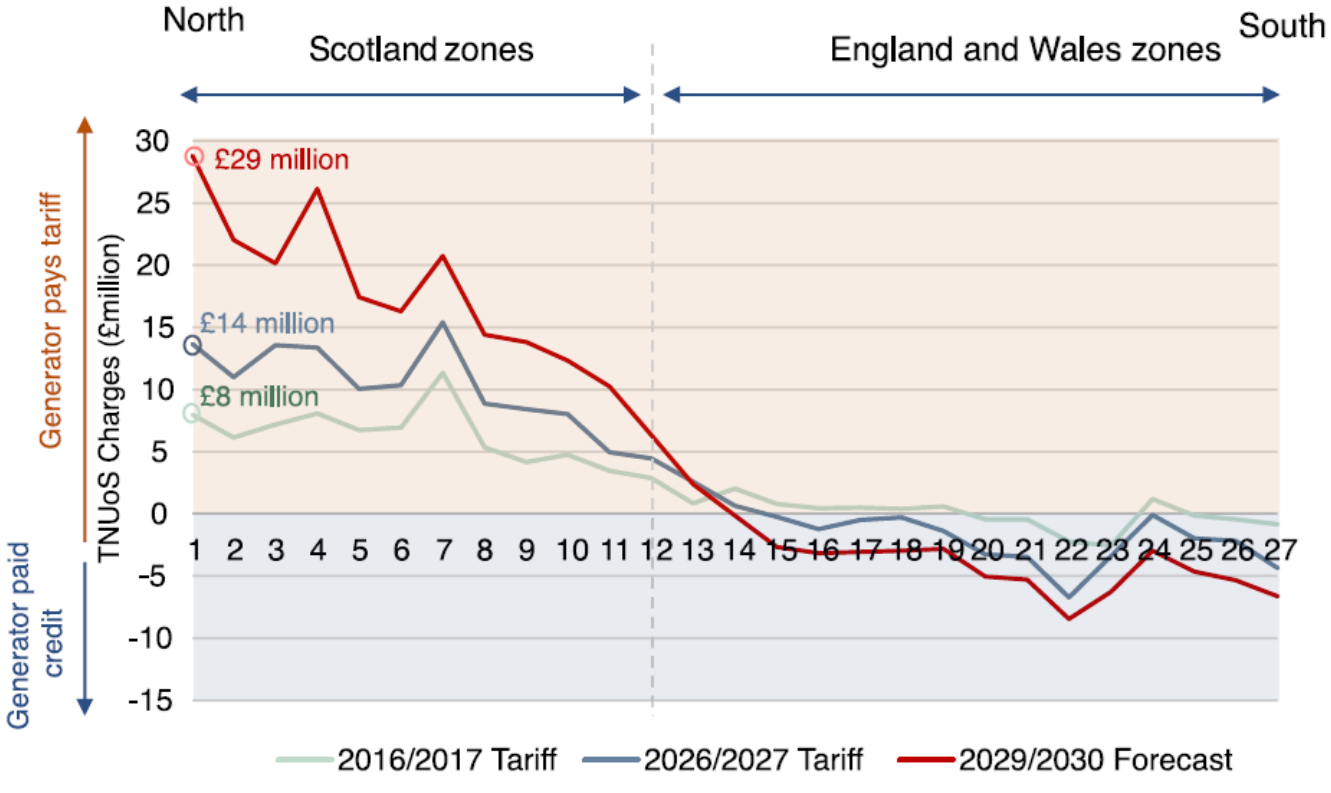
the energy landscape

And the growth of transmission charges

Transmission charges in the north of Scotland could more than double by the end of the decade, whilst credits – payments – to generators in southern England will increase



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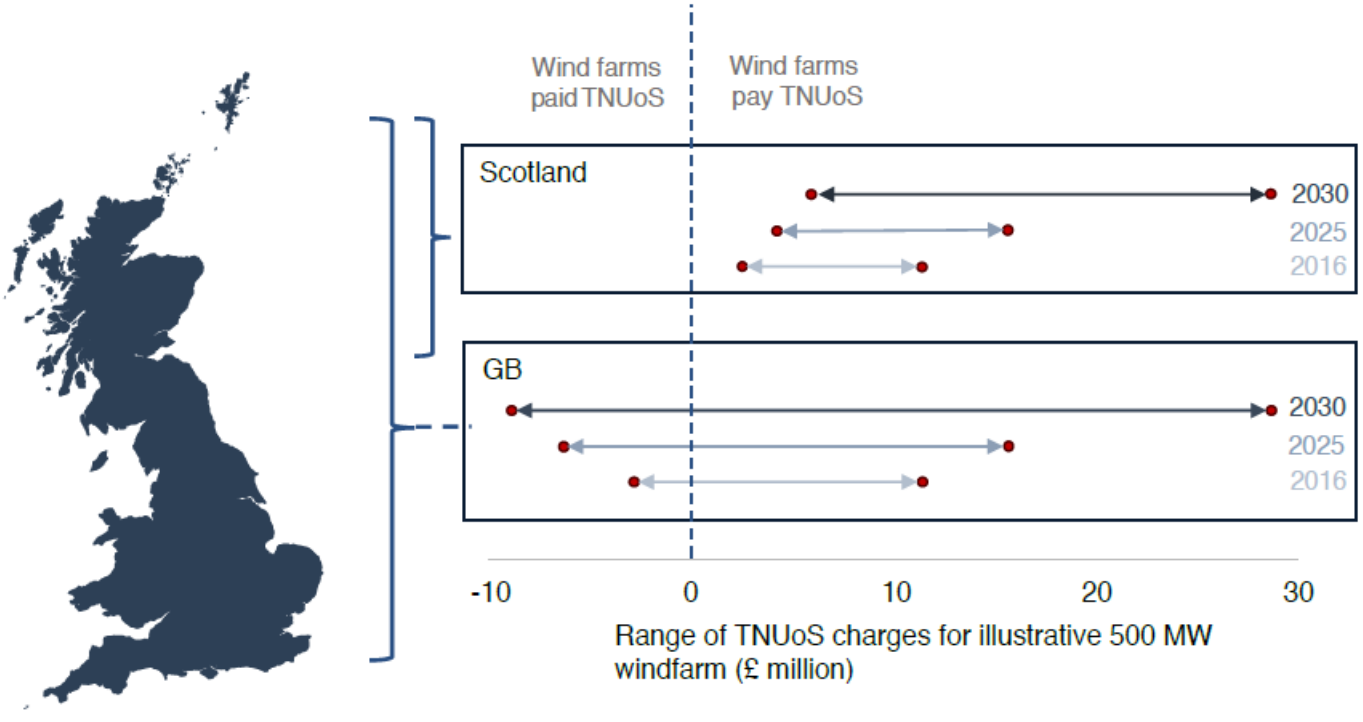
The locational difference is growing



The variation in TNUoS is no longer just a GB-wide issue: the variation within Scotland in 2030 will be bigger than the variation across GB today

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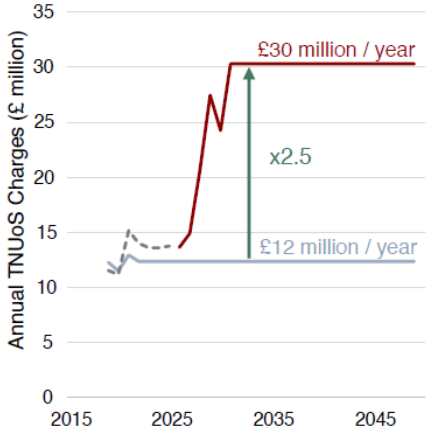
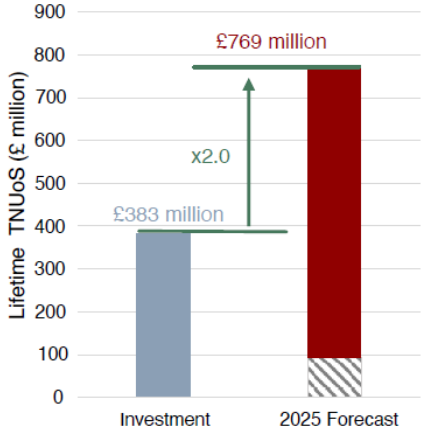
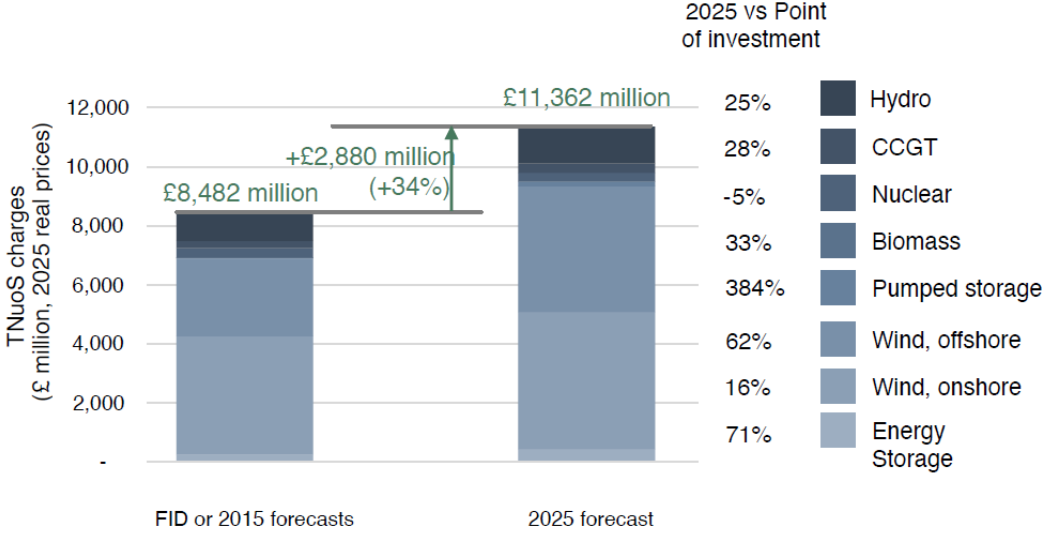
Erosion of project value…

These changes increase the costs faced by existing projects whilst there is little they can do to respond. The result is a reduction in project value

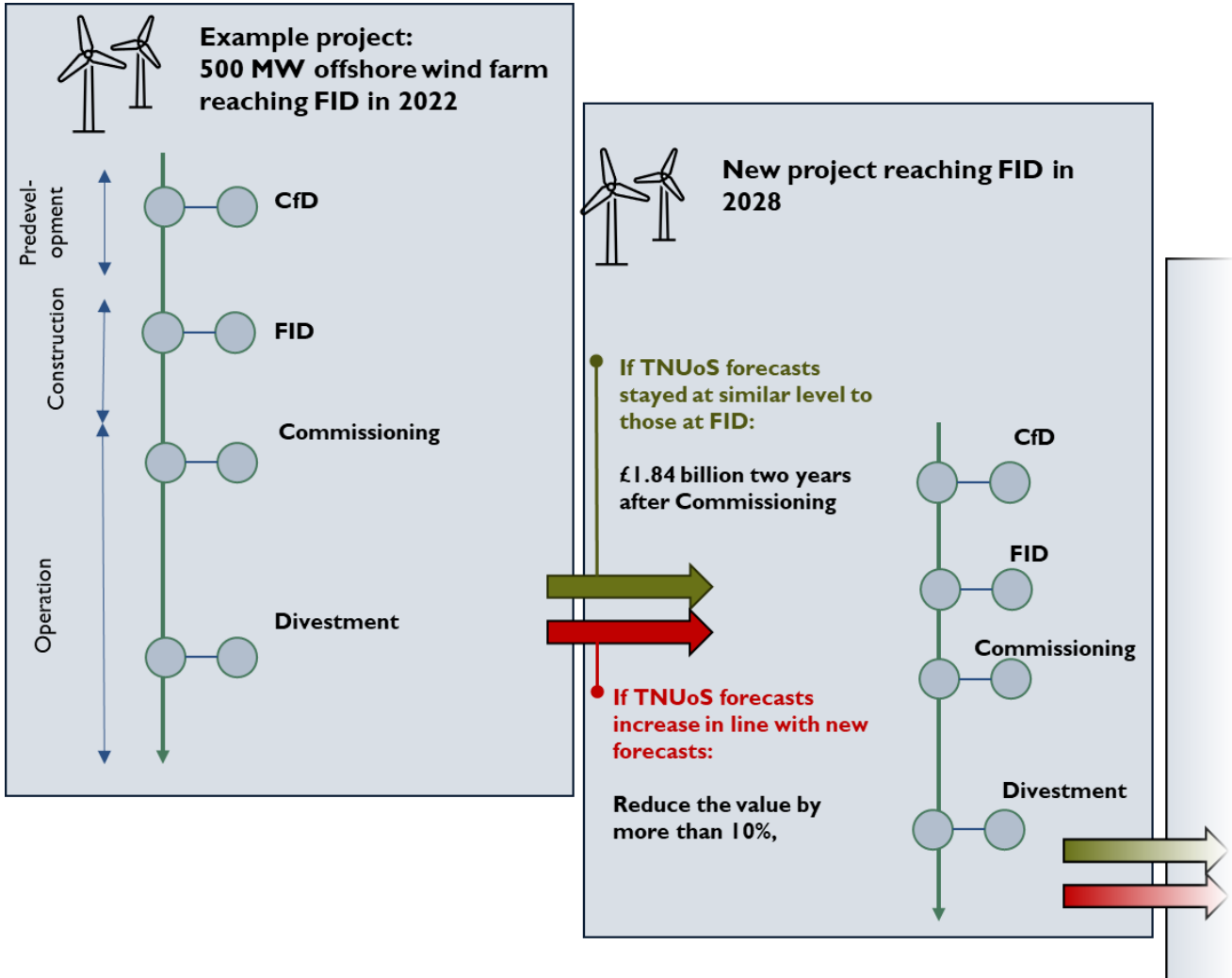






TEL the energy landscape

… reduces capital recycling



Reduced project value means less capital available at the point of divestment. That is less capital available to flow into the next generation of projects.

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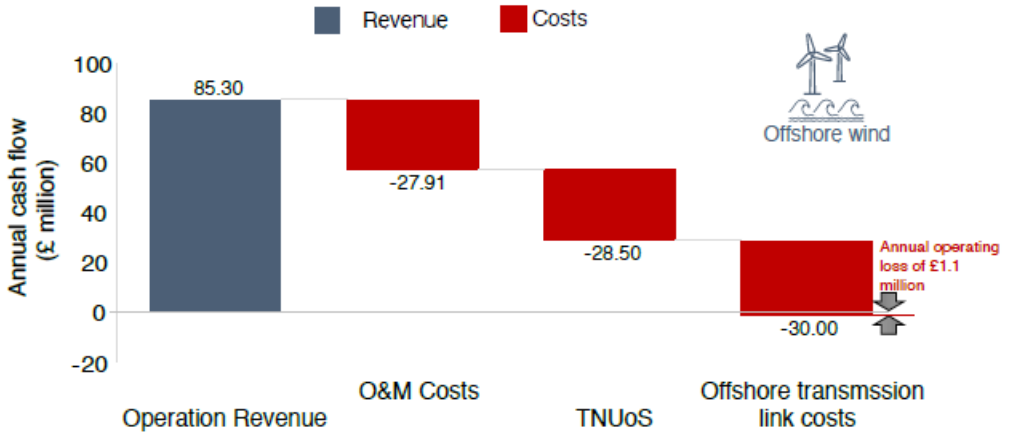
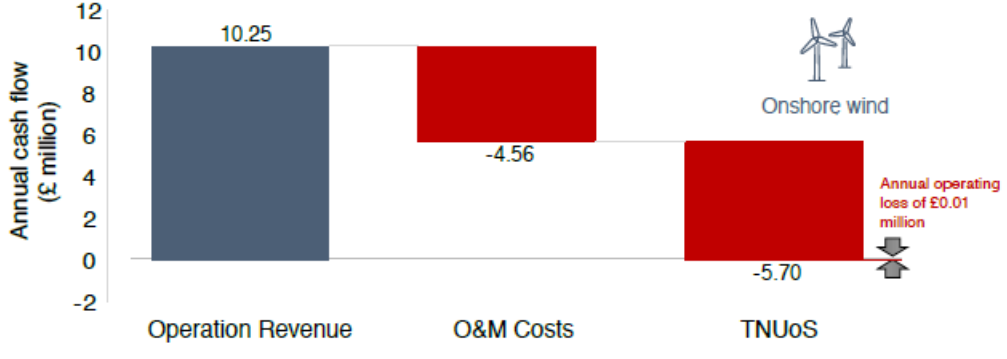
In the worst case, projects could close early

TNUoS charges can represent the largest component of ongoing operating costs for renewable projects. As charges rise, operating profits reduce and could easily turn negative, particularly for merchant generators.





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Jeopardizing Britain's Energy Transition

Existing issues

TNUoS has always been stacked against Scottish generators and, together with the CfD framework, works against the interests of consumers.

New issues

- Sharp increase in scale and volatility
- Erodes project value
- Direct impact on capital available for investment in new generation
- Adds to existing market headwinds
- Creates bad outcomes for consumers
- Risks early closure of operating generators
- Fails to align with strategic planning

£2.9 billion increase in the TNUoS bill for the Scottish fleet compared with point of investment or 2015

How to reform TNUoS

Three simple steps can stabilise investment and align TNUoS with Britain's strategic energy goals:

1. Fix TNUoS for **existing projects** in real terms at the charging level prevailing at the time of their original CfD bid (or for non-CfD projects, at the time they reached an investment decision), reversing the erosion of project value;
2. Fix TNUoS for **new projects** in real terms at the level prevailing when they bid into a CfD auction, restoring investor confidence; and
3. Launch a **fundamental review** to align TNUoS with the Strategic Spatial Energy Plan.

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Recommendations

Action 1: Fix charges for existing projects at levels prevailing at the point of their original CfD bid

Existing generators should have their TNUoS charges fixed in real terms at the level prevailing when the project submitted its bid into a CfD auction or made a final investment decision. This will remove cost increases that erode project value and reduce the risk of early asset closure, particularly for assets that remain critical to the transition. Importantly, it would protect project value and release additional capital for reinvestment in new projects, while also rebuilding investor confidence following recent and significant changes in TNUoS forecasts.

Action 2: Fix charges for new projects

Similarly, new projects should receive a fixed TNUoS real terms charge at the level prevailing at the time each project bids into a CfD contract. Similar arrangements should be put in place for other technologies which use different support mechanisms, or which invest purely on a merchant basis. This will give investors and lenders the certainty they need to commit capital and maintain the pipeline of new development.

Action 3: Undertake a fundamental review

Alongside these immediate measures, Government, Ofgem and NESO should launch a fundamental review of how transmission costs are recovered. That review should ensure that the TNUoS framework supports, rather than undermines, the SSEP and the wider strategy for a decarbonised and secure electricity system. And it should ensure that all users of the transmission system contribute to network costs.

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Thank you

Dr. Simon Gill PhD, Mphys, MIET

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Beyond Cost reflectivity What is charging's role under strategic planning?

SSEP & connections as spatial allocators
Charging as supporting tool

The system is now strategically planned

Strategically Planned System	The **SSEP** will determine ***where*** generation and storage is needed
	The **CSNP** will determine ***what network*** is built to deliver it
	Connections reform determines ***who*** can access the grid, ***when***, and at ***what capacity***
	CfD auctions determine ***who*** gets revenue certainty
	Seabed leasing (for offshore) determines ***where*** development occurs

The locational signal landscape after SSEP + connections

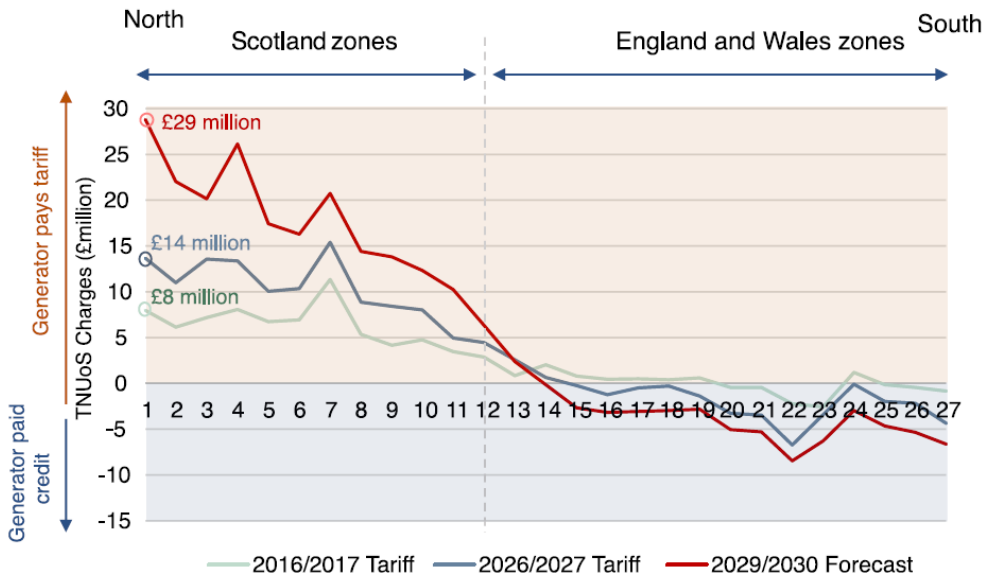
Signal Mechanism	Locational Strength	Nature
SSEP Pathway	Strong (regional)	Top-down strategic
Connections Reform (Gate 2+)	Very strong (technology/location/capacity)	Primary spatial allocator
Seabed Leasing (ScotWind, INTOG, TCE)	Strong (site-specific, offshore)	Binary, long-term
Planning Consent	Moderate	Regulatory
CfD Allocation	Strong (technology pots)	Competitive procurement
TNUoS Charges	Variable (27 zones)	Cost signal, volatile

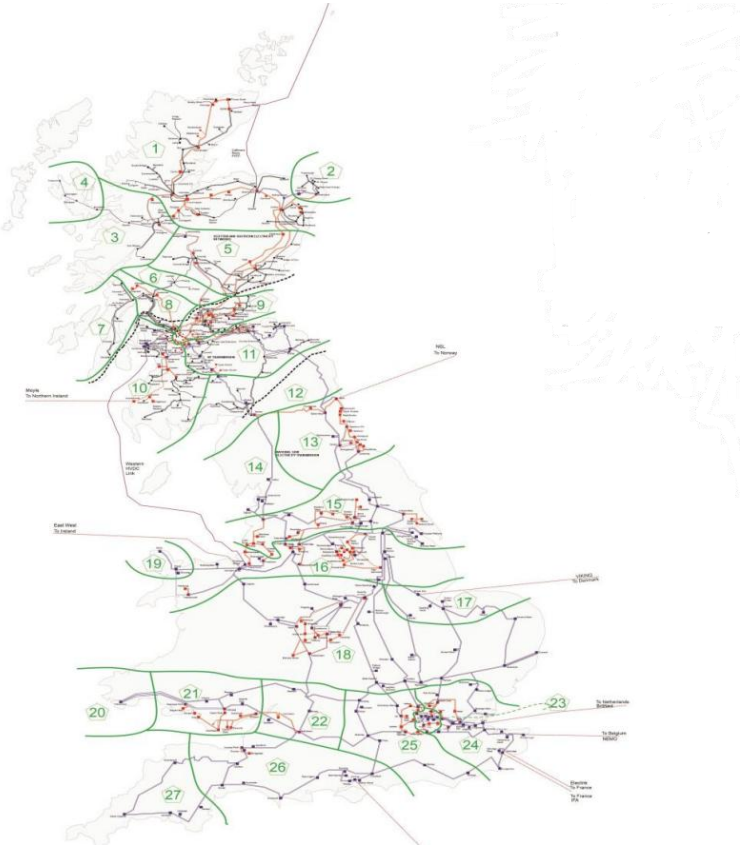
SSEP & connections reform are now the strongest locational signals

Seabed leasing, planning, CfD allocation also carry real spatial weight.

TNUoS remains important for cost recovery, but as a signal it is volatile and second-order, not the primary steering tool. In the context of other competing signals, TNUoS is a policy contradiction.

Why TNUoS is the wrong primary signal





Cost-reflective charging contradicts spatial planning when location is policy-determined, not market-driven

SSEP delivery risks in a “moderate” spatial plan

nadara

Strong SSEP → Small role for locational signals

Weak SSEP → Bigger role for locational signalling

Delivery Risk	Signal Precision Needed	Mitigations
Attrition / non-delivery	Sub-regional (specific substations)	Additional connection windows /Targeted procurement
Under-utilised infrastructure	Local (specific nodes)	Additional connection windows /Targeted procurement
Unanticipated demand	Regional (demand placement)	Demand connections reform
Technology mix misalignment	Regional (tech-specific)	CfD/CM tech differentiation

What should complementary signals actually do?

Geographic precision

- Node or substation-specific, not broad 27-zone average

Technology-specific

- Capacity to distinguish between technologies (ie offshore from battery storage from hydrogen

Time-sensitive

- Respond to when we need capacity, in the timescale we need it

Actively targeted

- Fills specific gaps, not passive price signal

Predictable

- Investors can bank on signals, not volatile year-on-year

Fundamental reframe – charging's objective limited to stable cost recovery
What non-SSEP signals are useful? Explicit planning levers, demand-side locational tools, targeted procurement?
Any alternative signalling mechanisms that might be fit for purpose? (ie targeted procurement though NESO network services or equivalent ?).

So, what might this mean for RNP?

Function	Current Approach	Proposed Approach
Network cost recovery	Locational TNUoS (27 zones,volatile)	Socialised/flat-rate TNUoS (stable, predictable)
Locational investment signal	TNUoS locational component	SSEP + Connections Reform (primary signal)
Delivery gap correction	None (assumed market responds to TNUoS)	Targeted procurement / CfD refinement
Technology mix optimisation	None	SSEP-aligned procurement with technology/location criteria
Demand placement	Limited	Demand connections reform with co-location incentives
Investor certainty	5-year forecast, annual volatility	Fixed at point of competition (CfD bid window)

Final Messages

1. SSEP and connections are the spatial allocators—demote charging to stable cost recovery

2. Fix TNUoS at CfD bid or socialise—stop penalising the locations we need

3. Explore opportunities to address delivery gaps with precision tools, not broad-brush volatility

Thank you

Barney Cowin | Strategic Grid & Electrical Lead

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Nina Brundage

Regulatory Affairs Associate

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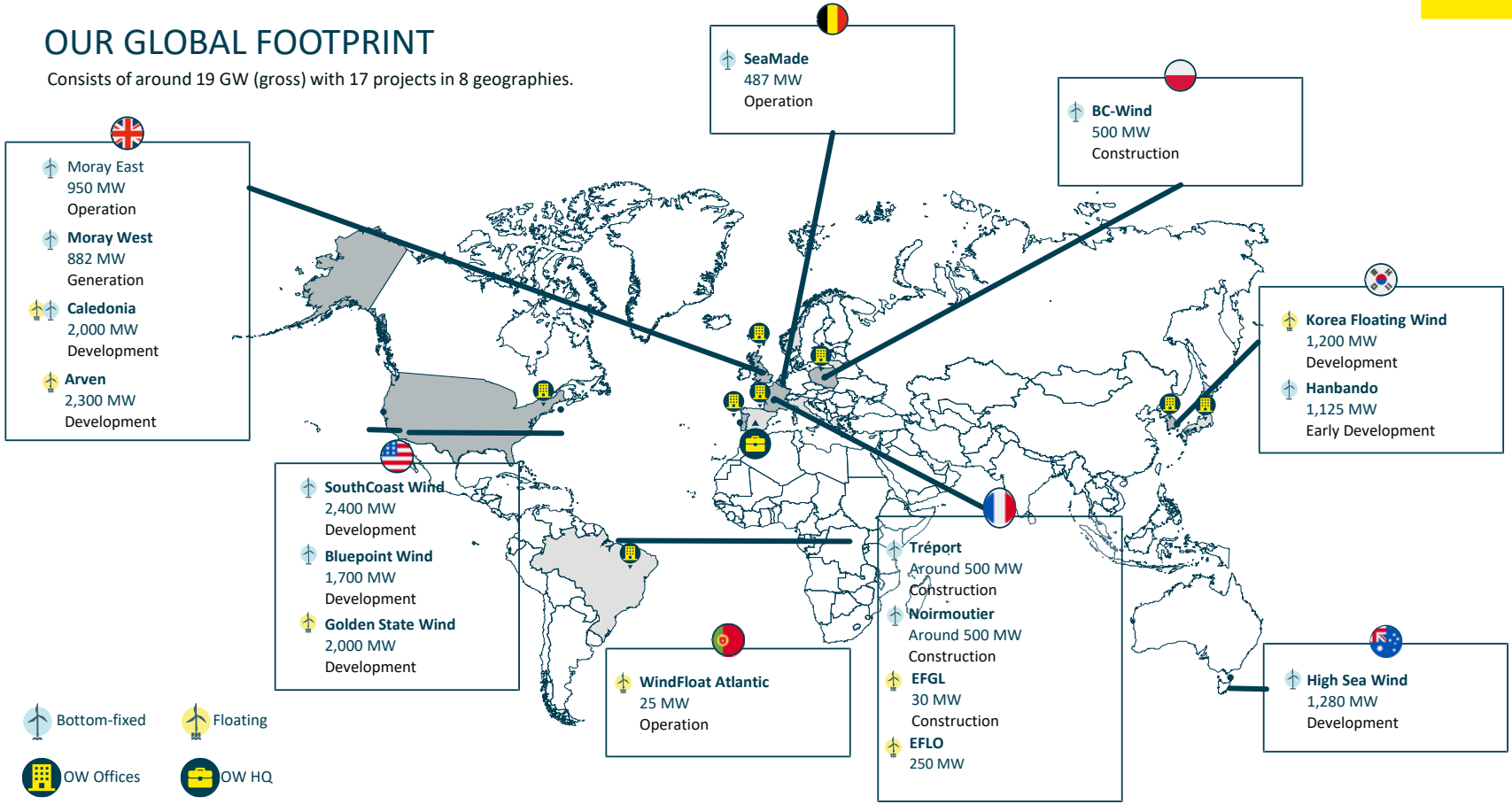
Grid & Networks Conference
Session 2 - Mixed signals: the existential question of charging in a spatially planned system

Nina Brundage, Regulatory Affairs
Ocean Winds
Glasgow | 26 February 2026

OUR GLOBAL FOOTPRINT

Consists of around 19 GW (gross) with 17 projects in 8 geographies.



Other Locational Signals: Transmission Loss Multipliers

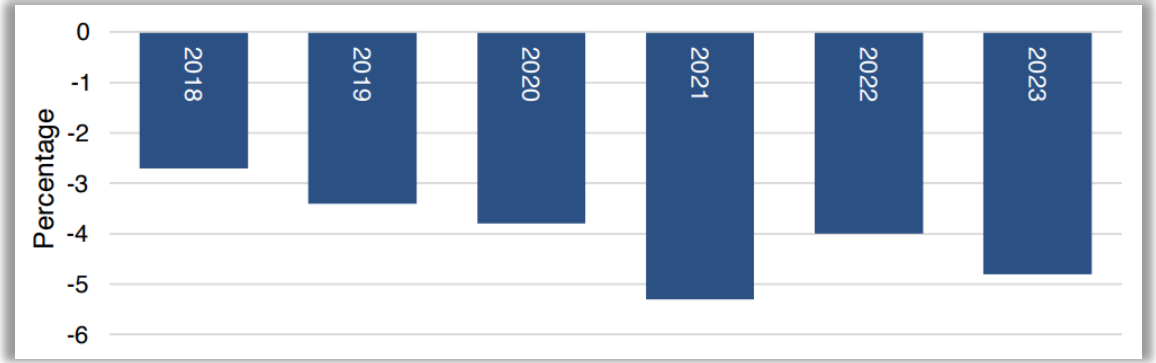
Transmission Loss Multipliers	
Locational Transmission Loss Factor (TLFs)	**Non-Locational** Transmission Loss Adjustment (TLMO)

ELEXON

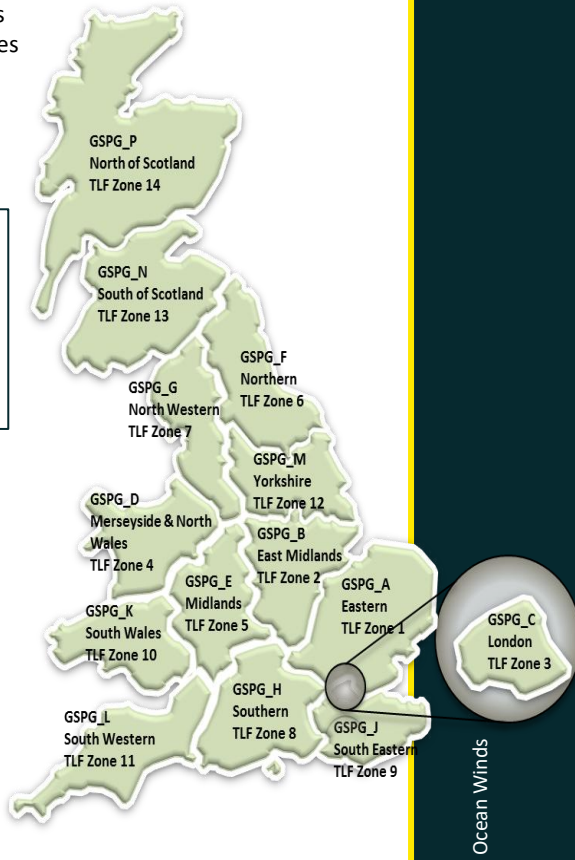
What are Transmission Loss Factors (TLFs)?

Transmission Loss Factors (TLFs) are used to allocate transmission losses based on geographical location. They adjust the cost of losses to reflect where electricity is generated and consumed. TLFs can be positive or negative depending on local conditions, encouraging new generation closer to areas with higher demand.

Figure 11: North of Scotland TLMs for winter months since the introduction of locational transmission loss allocation (Source: Elexon[15])



UK Transmission Loss Multiplier (TLM) Zones



Source: Simon Gill (2026). Transmission Charging in Scotland: Jeopardising Britain's Energy Transition

Other Locational Signals: Transmission Loss Multipliers

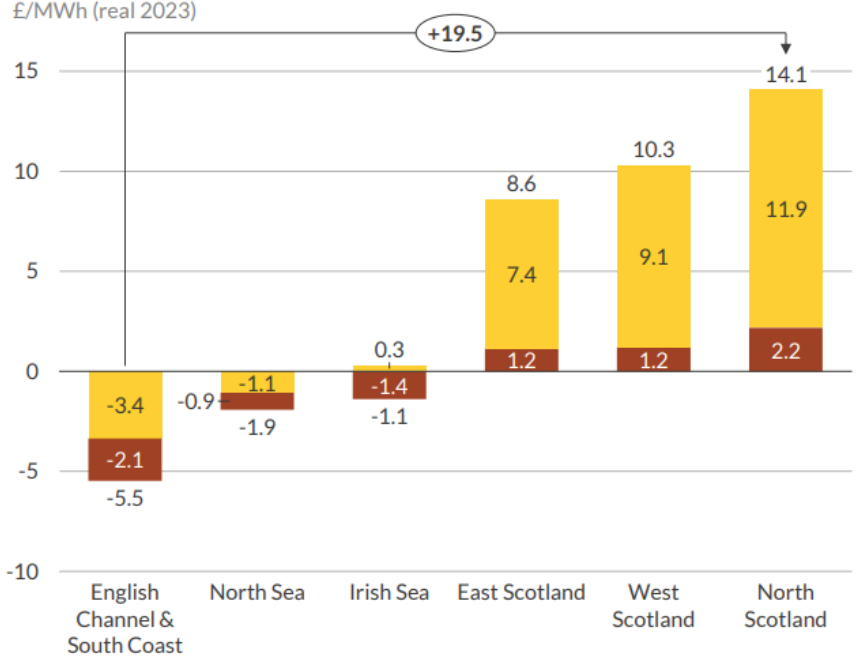
I. Introduction

TNUoS charges combined with network loss costs (TLM) lead to differences of up to £20/MWh in CfD bid prices of offshore wind farms across regions

AURORA

Estimated Impact on Offshore Wind CfD Bid Price – 2025 Entry[1]

£/MWh (real 2023)



1 Impact of TNUoS differs by up to £15/MWh between regions

- **TNUoS** charges are a **key operational cost** during a wind farm's lifetime, which need to be accounted for in its bid price in a CfD auction
- Aurora has projected that the combined impact of TNUoS and TLM on CfD bids for offshore wind farms in North Scotland will be **£20/MWh** higher compared to those in the English Channel and South Coast. The wider TNUoS tariff could contribute approximately **£12/MWh** to CfD bids for wind farms in North Scotland vs **£-3/MWh** for wind farms in the English Channel & South Coast

2 Impact of charges for losses differs by up to £4/MWh between regions[2]

- Transmission Loss Multipliers (**TLMs**) are network charges which are incurred **to recover the costs of losses** on the electricity network
- Similar to TNUoS wider tariffs, they differ across regions
- Generators in the North of GB, which are further from demand centres, pay higher charges for losses than those in the South, where generators can even receive small payments instead of being charged for TLM
- Aurora estimates **TLMs increase CfD** bids **in the North by up to £2/MWh** compared to **£-2/MWh in the South**
- In the reminder of the analysis, we focus on the TNUoS wider tariff

CfD price (TNUoS 2024 forecast) minus CfD price (TNUoS 2017) | Cfd price (TNUoS forecast 2024 with varying TLM) minus Cfd price (TNUoS forecast 2024 with constant TLM)

1) Under status quo TNUoS in the Aurora Net Zero 2024 scenario. The TLM assumption for constant TLM is 98%. The analysis is done for AR6 onward plants. CfD strike price is the price necessary to give NPV = 0, assuming a 15-year contract and 30-year lifetime. The 2025 entry year is shown as an illustration. The capacity added beyond AR6 is expected to be installed 2028 onwards 2) The assumptions on TLM are on slide 17

Source(s): Aurora Energy Research, NESO

6

Source: Aurora Energy Research (2024), *The cost of locational signals in network charges to the consumer.*

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Plugging the gaps: the unfinished business of Connections Reform

Chaired by Kyle Murchie,
Specialist Connections Engineer, Roadnight Taylor

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Jamie Webb

Head of Connection Window Optimisation

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Public

Plugging the gaps: the unfinished business of Connections Reform

Jamie Webb
Head of Connections Optimisation
NESO

NESO
National Energy System Operator

Contents

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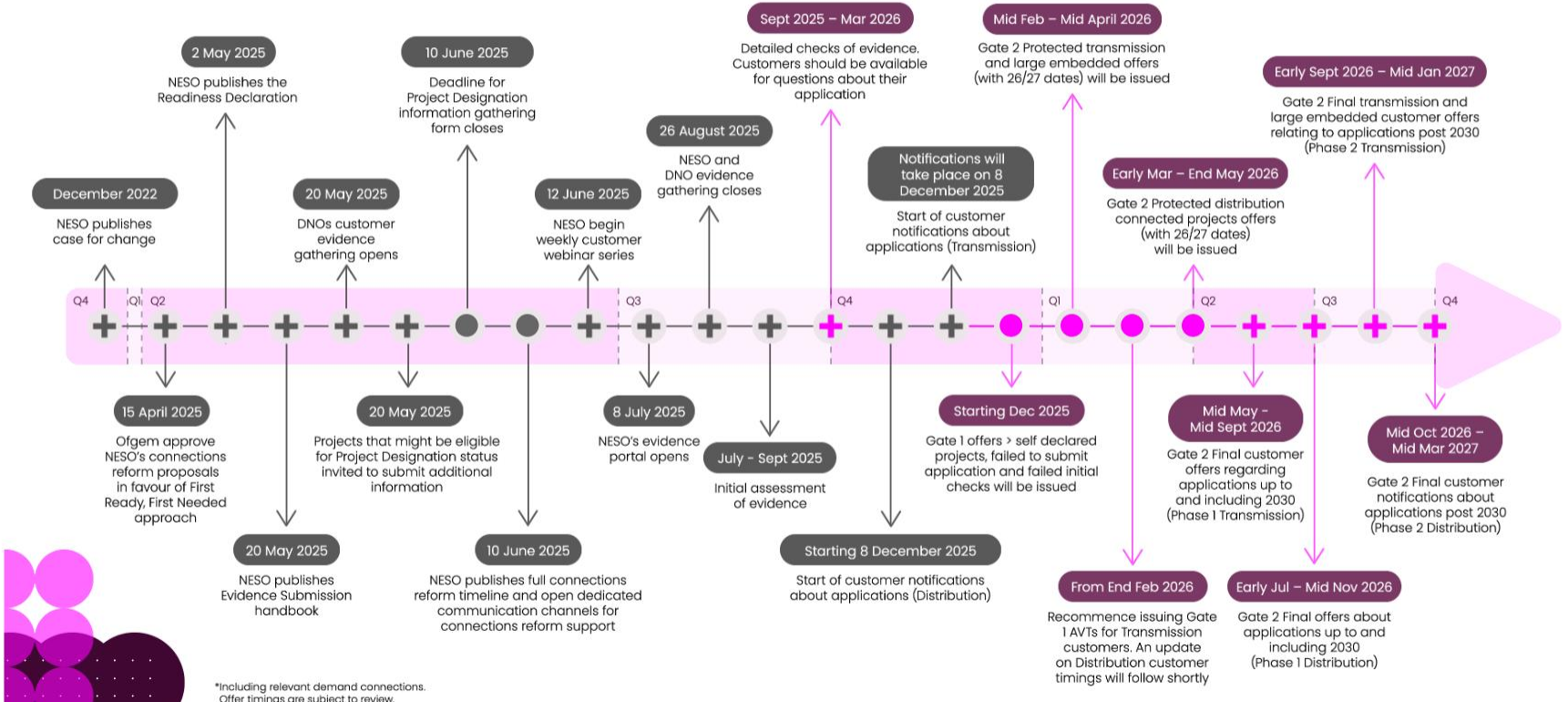
Connections Reform Timeline*

This page is interactive. Click the + to expand or enlarge content.



*Including relevant demand connections. Offer timings are subject to review.

Catalysing Demand

Demand Connections Growth

Unprecedented growth ~x3 increase in the last year

Pipeline supporting Demand Connections

Pipeline must support viable demand projects and accommodate strategically important projects

Ofgem Call for Input

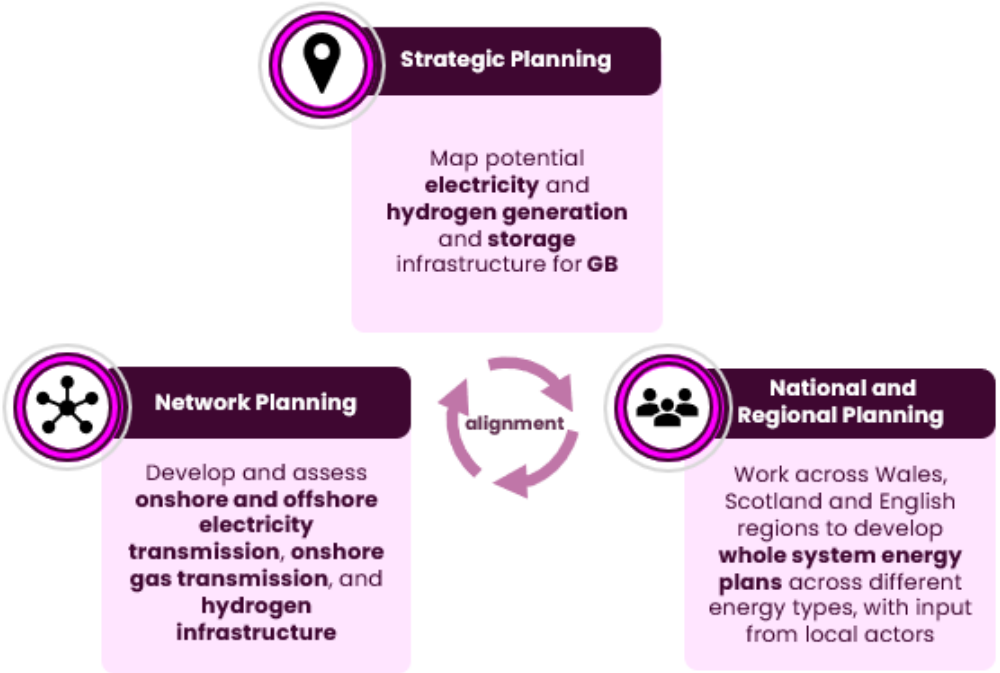
Ofgem has published a clear framework via its call for input with three core pillars: Curate, Plan and Connect

NESO is exploring options

NESO is working collaboratively with government and Ofgem to deliver these three pillars at pace

Long term planning

Joining up GB's energy system



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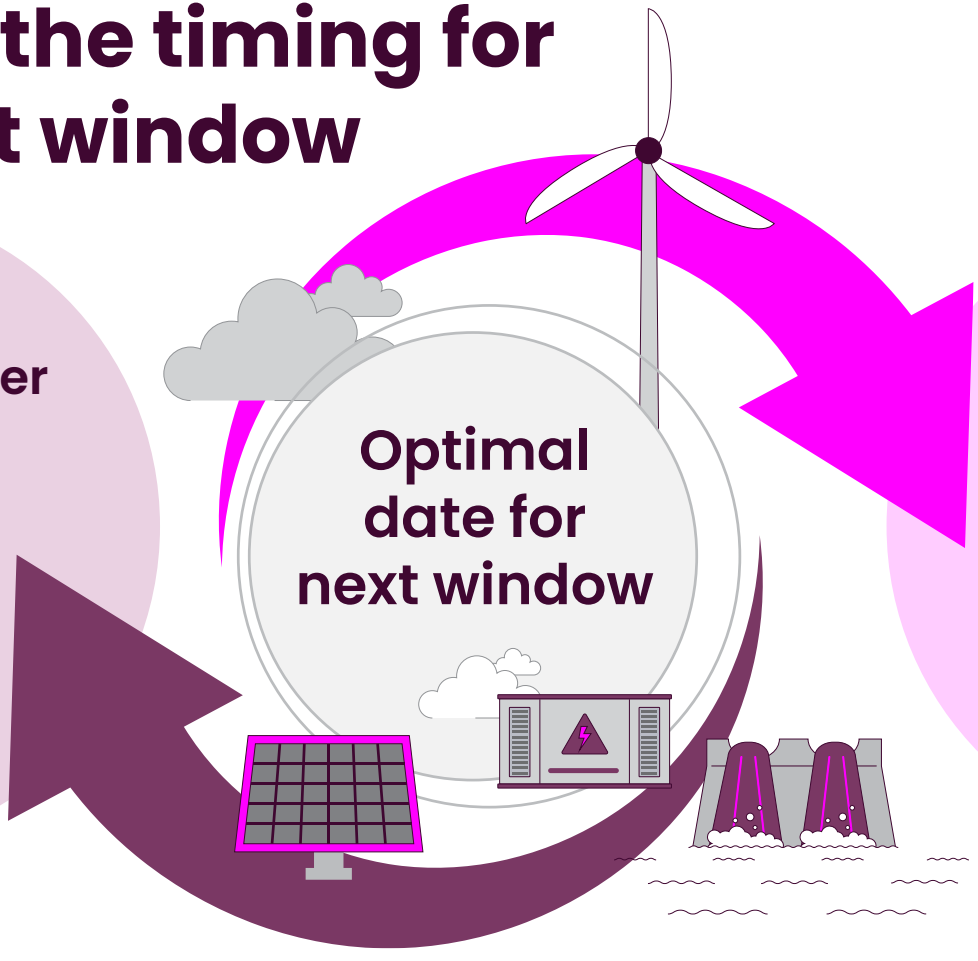
National Energy System Operator

Setting the timing for the next window

Pull to do sooner

- Filling undersupply
- Newly protected projects
- Mod apps



Push to do later

- Dependency on issue of Gate 2 offers
- Demand policy changes
- Very little undersupply
- Annual methodology review
- Customer experience

Working on addressing…

Lack of clarity/ certainty on dates and timelines that limit the ability to plan and invest

Contradictory information across various NESO calls/ documentation and across NESO-Tos-DNOs

Call for more guidance on Connections Reform methodology (clarity on mechanics/ method)

Government/ Ofgem not being represented in seminar (engagement)

Modification Application Fee for advancement request

NESO ensuring CCMs have resource for ongoing contract management, not just issuing offers

Financial compensation for customers who have committed significant funds who don't receive an offer

Questions taken away from webinars – for review – when will they be answered?

Raising tickets/ raising queries via portal – not being answered

Want to be able to engage with CCMs

Securities (and liabilities) freezing – confirmation/ clarification needed

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National Energy System Operator

Thank you

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National Energy System Operator

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Kyle Murchie
Specialist Connections Engineer, Roadnight Taylor

Jamie Webb
Head of Connection Window Optimisation, National Energy System Operator

Gareth Hislop
Head of Market Development and Commercial Operations,
SP Energy Networks

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Head of Electricity Connections Reforms
& Governance, Ofgem

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Securing the grid of tomorrow: rewiring our delivery model

Sponsored by SLR

Chaired by Charlotte Higgins,
Associate Director, Arup

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Securing the grid of tomorrow: rewiring our delivery model

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Grid and Networks Conference 2026

Chair: Charlotte Higgins,
Transmission & Distribution Lead

Evolution in Network Planning

Desired Outcomes

Develop the grid at pace

Investor confidence

Community and consumer benefits

Grid security and resilience

CSNP Key Principles

- Plan strategically ahead of need to enable necessary investments required for net zero
- Ensure efficiency by taking a holistic view across onshore and offshore networks in GB in the interests of consumers
- Robust and transparent assessment of a broad range of options considering multiple assessment criteria
- Accelerate delivery by providing certainty on options to support regulatory and planning processes

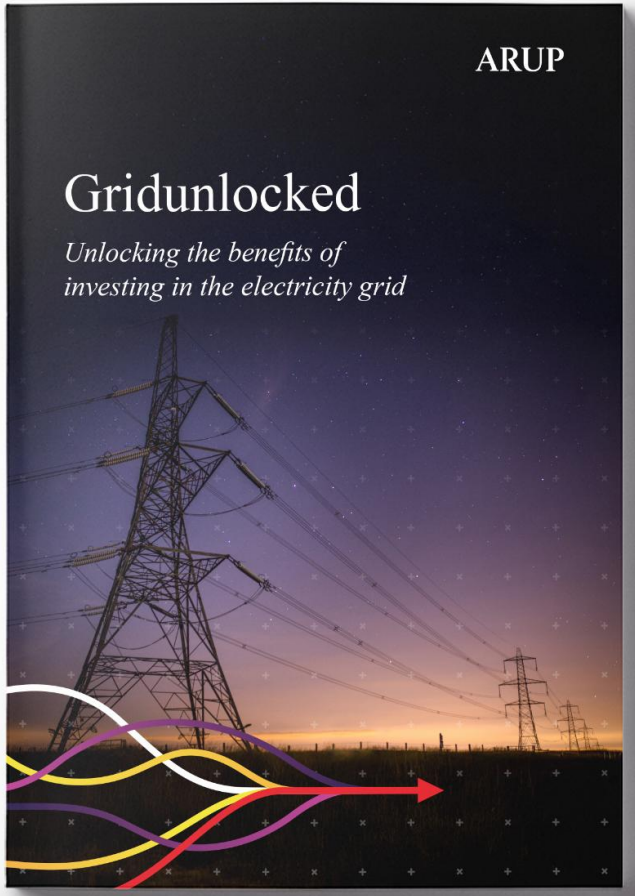
New Study: Gridunlocked

A robust electricity grid is key to enabling the transition to a more secure, resilient and low carbon energy system that will help power the UK's growth.

But to what extent?

It's this question we set out to answer with Gridunlocked – a macroeconomic study designed to explore some of the socioeconomic impacts of different levels of grid investment and electrification.

Download the report:
www.arup.com/gridunlocked



The return on grid investment

Our **'supercharged'** scenario demonstrates that continued grid investment will generate valuable and widespread returns.

An **additional £34 billion** invested between 2026 and 2040 could create an **additional £194 billion in gross value added (GVA)** for the economy, representing a financial return of nearly four-to-one.

On average, the 'supercharged' scenario could also support around **92,000 additional jobs each year**, spread across regions and sectors – from engineering and construction to manufacturing and technology.

Download the report:
www.arup.com/gridunlocked

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Lauren Logan

Head of Transmission Regulation & Policy

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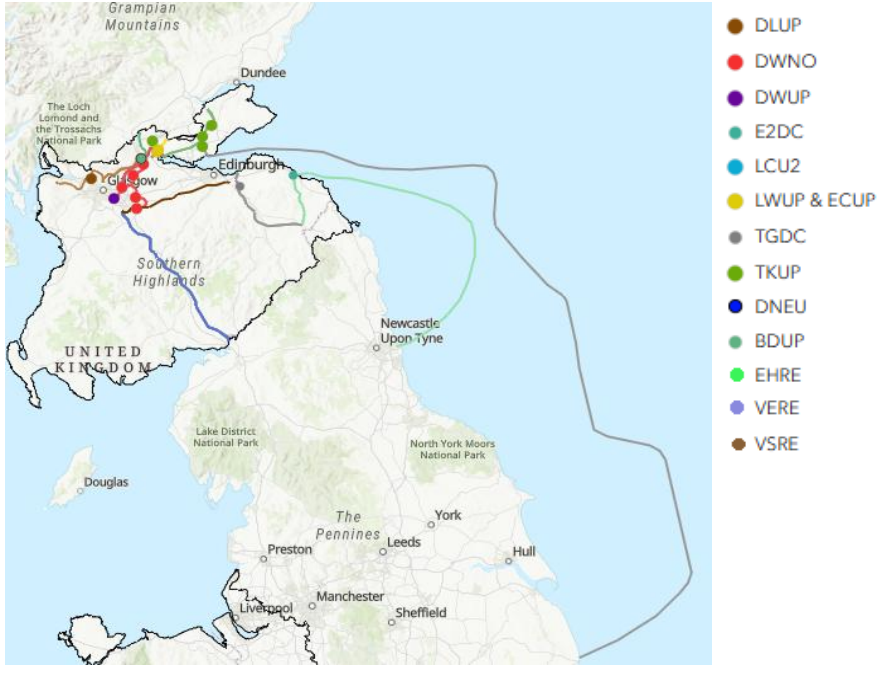
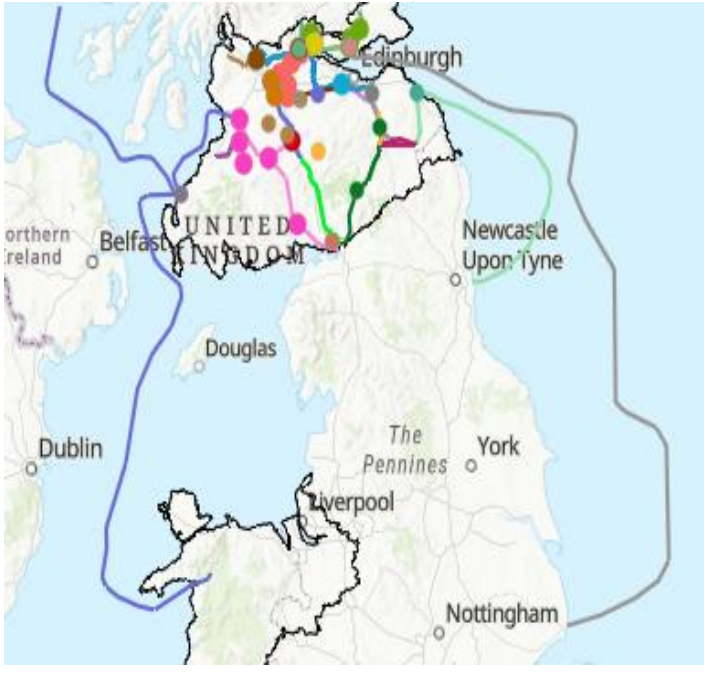
Delivering beyond Clean Power 2030





SPT CP2030 Projects

SPT's Best View Projects for RIIO-T3 (including CP2030)

SPT's RIIO-T3 £10.6bn investment will be delivered to meet CP2030 and beyond.

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Rasoul Azizipanah

Head of Power Systems and Networks - Energy Advisory

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Developer Challenges in Strategic Network Planning

Timing and Constraints

- **Timing Uncertainty**

Evolving planning cycles make it difficult to align project sequencing with network readiness.

- **Early-Stage Reinforcements**

Several reinforcements remain at early development stages, creating uncertainty about future grid capacity availability.

- **Constraints Mismatch**

TO and DNO constraints vary locally, and technology clustering (Wind- vs solar-dominant) can create uneven network utilisation.

- **Need for Directional Signals**

Developers would benefit from simple indicators of where capacity is most likely to emerge.

Opportunities for Developers to Support CSNP Delivery

Why CSNP Still Matters

- **Alternative Route Insights**

This supports earlier assessment of engineering, environmental and social trade-offs.

- **Buildability Intelligence**

Early landform, access, and consenting insight reduces redesign and shortens optioneering cycles.

- **Flexibility & Hybrid Solutions**

This helps reduce short-term constraints costs.

- **Non-TO Pathways Where Appropriate**

This route widens the solution space and supports competitive, evidenced-led options.

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Steven Doherty

Senior Transmission System Planning & Investment Engineer

SSEN Transmission

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Main North of Scotland Electricity Transmission Network in 2030

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In-flight Investments

1. Argyll 275kV strategy
2. Fort Augustus to Skye 132kV upgrade
3. Orkney 220kV AC subsea link

Pathway to 2030 Investments

1. Beauly to Loch Buidhe to Spittal 400kV
2. Beauly to Blackhillock to New Deer to Peterhead 400kV
3. Beauly to Denny 400kV uprating (with SPT)
4. Kintore to Tealing (with connection to Alyth) to Westfield 400kV (with SPT)
5. Spittal to Peterhead 2GW HVDC subsea Link
6. Peterhead to Drax 2GW HVDC subsea link – Eastern Green Link 2 (with NGET)
7. Peterhead to South Humber 2GW HVDC link – Eastern Green Link 4 (with NGET)
8. Western Isles 1.8GW HVDC link

Public Consultation to Inform Project Development

All new reinforcements remain subject to detailed consultation and environmental assessments to help inform route and technology options

More detail on these projects, including how to sign up for updates, will be made available on SSEN Transmission's website, www.ssen-transmission.co.uk

New Infrastructure (Routes shown here are for illustrative purposes)

Upgrade/Replacement of Existing Infrastructure

Existing Network

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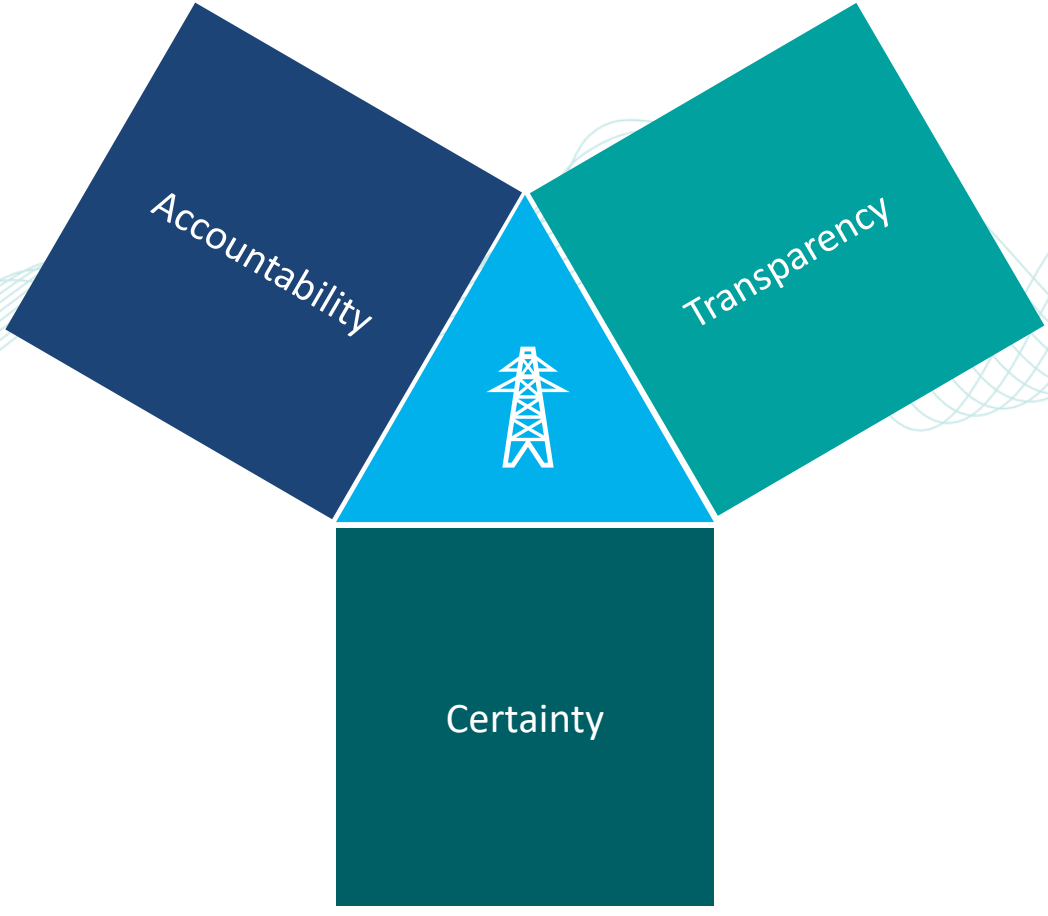
Accountability
Transparency
Certainty

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