

DIARY CASE



Llywodraeth Cymru
Welsh Government

PREAMBLE

Who requested the meeting?	The First Minister was asked to speak at the event by RenewableUK Cymru
Is there an agreed agenda?	8th October 11:45 – 12:15 – meet with National Energy Systems Operator

DIARY CASE BRIEFING

Purpose

The Future Energy Wales conference is staged annually by RenewableUK and provides energy developers and stakeholders with the opportunity to take part in exhibits and engage with a two-day programme of speakers and workshops. RenewableUK is the trade association for renewable energy with 500 members, including developers, ports, supply chain and other strategic partners. For the 2025 conference RenewableUK is keen to tackle topics such as grid reform and deployment, the transformative opportunity presented by the Celtic Sea, and accelerating supply chain growth, while exploring how Wales can retain value and long-term benefits from its clean energy transition.

11:45 to 12:15

Meeting with NESO

██████████ National Energy System Operator (NESO) Director of Strategic Energy Planning

Lines to take

- We are keen to ensure the attractiveness of Wales for inward investment/green jobs and growth in relation to network access.

- I would welcome an update on the Strategic Spatial Energy Plan (SSEP) and connections reform and to understand the pace of change and what, if anything, can be done to make grid capacity available in Wales in the short term.
- Analysis from our Future Grids for Wales report shows that Wales's electricity demand may almost triple by 2050 so updating Wales's grid is essential if we are to have an energy system fit for purpose in the long term.
- In Wales our approach to planning at the local regional and national levels is putting us in a strong position to be clear about our needs and provide the evidence for investment in the grid.
- I want to reiterate the need to provide my government with sufficient time to digest and consider the key outputs from the SSEP. We must have time to consider options before the Secretary of State agrees a final pathway for publications and public consultation in 2026.
- There will be challenges in striking the right balance which enables much needed infrastructure to further unlock Wales economic potential but also considers a system that is least cost for our consumer, and its impact on environment, which can be accepted by society.

Background

You have agreed to meet with [REDACTED], National Energy System Operator (NESO) Director of Strategic Energy Planning.

NESO is the public body responsible for the long-term planning and operation of Britain's electricity and gas networks. Its primary goal is to ensure the nation's energy system remains secure, reliable, and affordable while facilitating the transition to net zero.

NESO will use the Strategic Spatial Energy Plan (SSEP) to develop a Central Strategic Network Plan (CSNP) for the transmission network for Great Britain.

NESO is also working on plans for the distribution network, which is the principal type of grid we have across Wales. It has set up Regional Energy System Planning (RESP) teams. Wales has its own team, which includes people who previously worked on the local and regional energy plans we have in Wales.

Welsh Government is working closely with the Wales energy planning team to make sure that their plans meet the needs of the people of Wales, including the needs of businesses to expand and decarbonise.

Strategic Spatial Energy Plan (SSEP) - The SSEP will take a holistic approach to spatial planning across various types of energy generation and storage, to inform development of the electricity networks. This will potentially complete in 2026. Welsh Government co-commissioned this work alongside UK and Scottish Governments. The methodology has been agreed and planning is now under way.

Central Strategic Network Plan (CSNP) - The CSNP will be the plan for on and offshore transmission networks, based on the SSEP and replacing Beyond 2030. The first version is planned for 2027.

Regional Energy System Plans (RESP) – The NESO are being commissioned by Ofgem to create regional plans for whole energy system needs. A first transitional plan (tRESP) is due at the end of 2025, with the full plan due at the end of 2027.

The National Energy System Operator will announce on 2 October expected dates of notification of the outcomes of the Connections Reform process.

Initially the outcomes of Connections Reform were expected by the end of 2025/early 2026. However, the volume of complex technical submissions, and challenges with the IT portal used to submit them, meant that it took several weeks longer than planned to receive and check all applications. NESO suspended its timeline and is now about to announce amended dates. It expects significant challenge once revised grid connection offers are issued and is making sure its processes are completed to a standard that will withstand this.

Previously each grid application has been dealt with individually, modelling the impact of the development on the network and identifying the necessary engineering needed. The sheer number of applications means this is no longer feasible. Connections reform is the first time multiple applications will be considered together. The process will also prioritise project depending on their planning status, confirmed access to land and their contribution to Clean Power 2030.

The new timeline means that some projects will have to wait quite a while longer for news on whether their projects will progress. NESO will start issuing outcomes to applicants to connect to the transmission network in December 2025, but customers connecting by 2030 will receive offers by June 2026 and those (such as Trydan) connecting beyond 2030 may not receive their final offers till September 2026 for transmission connected sites). Projects that are not prioritised in line with Clean Power 2030 will hear back later in 2026.

We expect many developers will be unhappy about this timeline and this may delay projects moving forward, as grid certainty is necessary to support continued development expense.

It is likely to feature prominently at the Future Energy Wales conference. [REDACTED] Strategic Energy Planning Director and Chief Engineer at NESO, will be on hand to respond to concerns.

We do not expect developers will direct their concerns to Welsh Government, but if this is raised, suggested initial lines are below:

- Whilst it is clearly important that developers have clarity on grid connections, this is also a pivotal moment for making best use of the transmission network in Great Britain.
- We should not underestimate the complexity of the work NESO has to carry out to deliver this unprecedented change in network management.
- The costs of the once in a generation upgrades the country needs are high, and it is important that NESO gets this right.