Early Horizon

WEEKLY EDITION

# UK Energy Intelligence Weekly Briefing

16–22 November 2026 · Energy news for energy-sector suppliers, installers, service companies and OEMs

**Issue 2026-W47**
Facts current to 23 Nov 2026
General market edition

## The Week in Brief

What happened, in plain terms, and what to take from it.

Ofgem turned up the pressure on late grid connections, NESO's balancing bill ran well over forecast, and transmission build moved on in Scotland and Somerset. Rooftop solar set an installation record. There is no new open tender this week for energy-sector suppliers, installers, service companies and OEMs.

1 **Ofgem opened an urgent inquiry into connection delays.** On 19 Nov it said connection offers for many protected and Phase 1 projects are dated later than before reform, and that it will look at why across NESO and the network companies. Enforcement is reserved for any material licence breach. Ofgem 19 Nov Developer groups have told Parliament that recent NGET Gate 2 offers have also included large increases in the cost of connection works; in one cited case, attributable enabling works were previewed to rise from £14.14m to £49.34m in six months. Those figures are industry evidence, not confirmed by NGET or Ofgem. PAC evidence

2 **Balancing costs overshot.** NESO's October outturn put balancing costs at £740m against a £390m month-ahead forecast. NESO Oct outturn Those costs are recovered through Balancing Services Use of System (BSUoS) charges — a £/MWh tariff paid, since the April 2023 reforms, by suppliers and other final demand, not by generators. NESO BSUoS NESO fixes the tariff in advance; when costs overrun, as they did in October, the gap is recovered in later tariffs and can, depending on contract terms, reach customer bills. NESO BSUoS guide NESO's Q&A says this forecast deficit is meant to be recovered over Fixed Tariffs 9 and 10. NESO Q&A Press reports NESO's working-capital facility rising from £700m to £1.7bn. Telegraph 20 Nov

3 **Transmission build moved on.** Scottish Ministers consented SSEN Transmission's Carnaig and Hurlie 400kV substations (18 Nov), and SSEN Transmission named preferred sites for the Strathbogie Hub (17 Nov) and the South Formartine substation (19 Nov). National Grid started main construction of its Woolavington 400kV substation in Somerset, with Balfour Beatty as contractor (18 Nov). SSEN 18 Nov SSEN 17 Nov SSEN 19 Nov National Grid 18 Nov

4 **Rooftop solar broke its annual record.** DESNZ said on 20 Nov that MCS data show over 270,000 solar installations in 2026, the most in a single year, with over a month still to go. DESNZ 20 Nov

5 **Rules for stability services and renewables auctions are being reset, slowly.** Ofgem's call for input on a dedicated network services licence closes 12 Jan 2027; NESO's stability tender award is planned for July 2027; AR8 opens with notional £1 budgets. Ofgem 20 Nov NESO tender rules DESNZ 19 Nov

6 **Balancing prices eased.** The 16–22 Nov average System Price was £192.63/MWh, −10.0% on the previous 14 days, with no negative prices. Causes are not established. Elexon data

## Our bottom line

A week of pressure and process, plus one placed construction job. The best-evidenced points all come from primary sources: Ofgem is scrutinising connection dates, balancing costs are above forecast, two contested Scottish substations can proceed, and a Somerset substation is now in main construction.

Our reading for energy-sector suppliers, installers, service companies and OEMs: re-dated grid connections may create re-planning and advice work for developers (not yet visible as paid work); transmission build mostly flows through large framework and main contractors, so access is usually by subcontract; and the rooftop solar numbers are the clearest demand signal of the week for installers.

**HOW SURE ARE WE?**

The events reported are correctly dated — **Solid**

Regulatory pressure on grid connections is rising — **Probable**

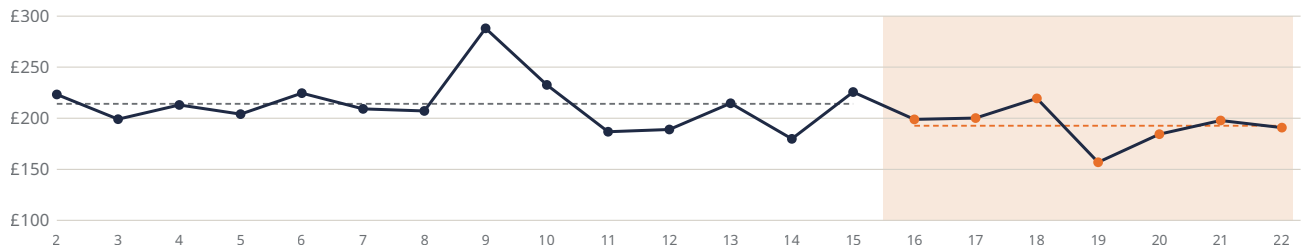
When supplier demand appears from the network news — **Tentative**

Whether price moves link to these events — **Unknown**

# Market Pulse

GB System Price from Elexon, half-hourly, settlement dates 16 Nov–22 Nov 2026.

| AVERAGE PRICE | VS PREVIOUS 14 DAYS | BELOW ZERO | ABOVE £300 | LOW – HIGH |
|---|---|---|---|---|
| **£192.63** per MWh, 336 half-hours | **−10.0%** was £214.08 (2 Nov–15 Nov) | **0** half-hours (previous 14d: 0) | **7** half-hours (previous 14d: 38) | **£90–397** previous 14d: £49–755 |




Daily average System Price, £/MWh, 2–22 Nov (day of month on the axis). Shaded area and orange dots: this briefing's week; dashed lines: the average for each period.

Facts: the longest short run was 17 Nov, settlement periods 14–24 (06:30–12:00), 11 half-hours averaging £208.70/MWh; the longest long run was 19 Nov, periods 1–21 (00:00–10:30), averaging £136.46/MWh. The highest daily average was £219.54 (18 Nov) and the lowest £156.92 (19 Nov). The highest half-hour was £397.00 (16 Nov, period 37) and the lowest £89.61 (17 Nov, period 9); the previous fortnight peaked at £755.35 (9 Nov, period 34). Against the previous 7 days alone (£216.68) the change is −11.1%. Wind, demand, outages and interconnector flows were not analysed, so no cause is claimed. Elexon data

# Week Ahead

Consultation windows, announcements and events for 23–29 November 2026.

| WHEN | WHAT |
|---|---|
| **Mon 23 Nov** | Elexon consultation CP1653 closes at 17:00. It would cut the minimum lead time for MSID Pair Allocations from five working days to one, relevant to flexibility participation. Elexon CP1653 |
| **Mon 23 Nov** | Elexon opens its P517 consultation, on reporting chargeable volumes for CVA metering systems to EMRS (closes 17:00 on 11 Dec). Elexon P517 |
| **Mon 23 Nov** | DESNZ opens a consultation on proposals to restrict or remove insulation and microgeneration measures from Warm Home Discount industry initiatives (closes 11:59pm on 20 Dec). DESNZ 23 Nov |
| **By Wed 25 Nov** | Ofgem is due to announce the 1 Jan–31 Mar 2027 price cap. This is a latest date; Ofgem says it may publish earlier. Ofgem price cap |
| **Thu 26 Nov** | NESO's Storage Behind Constraints consultation closes at 17:00. NESO SBC |
| **Thu 26 Nov** | NESO drop-in, 13:00–14:00, on proposed Dynamic Response changes: a tiered performance regime and unit suspension. NESO 26 Nov |

# Stories That Matter

Five developments, each split into what was reported, our reading, the angle for energy-sector suppliers, installers, service companies and OEMs, and what to look out for.

## 1 Ofgem opens an urgent inquiry into delayed grid connection dates

**REPORTED**

On 19 Nov Ofgem announced an inquiry into why connection offers for many protected and Phase 1 projects are dated later than before reform, "despite a clearing-up of the queue". It asked NESO and the networks to improve date data, publish more on Construction Planning Assumptions, tighten "ready and needed" queue rules (including financial commitments for over-subscribed technologies such as batteries, and for speculative data-centre projects) and police queue milestones. It also said it will implement developer self-build and transfer of transmission connections, is exploring stronger automatic compensation, will consult in December on a RIIO-3 connections incentive baseline, and will publish connection data in February's Infrastructure Progress Report. Ofgem 19 Nov On 2 Oct Ofgem had agreed a second extension for about 62 Phase 1 offers, citing NGET delays in providing Transmission Owner Construction Offers. Ofgem 2 Oct Developer groups have told the Public Accounts Committee that recent NGET Gate 2 offers have included large increases in connection-works costs, often without a timely breakdown. In two cases they cite, Transmission Connection Asset Works on a 50 MW solar plus 57 MW storage project nearly doubled from £6.77m (March 2025) to £13.07m (August 2026), and Attributable Enabling Works on a 47.5 MW battery were previewed to rise from £14.14m (March 2026) to £49.34m (September 2026). These are the submitters' figures; NGET and Ofgem have not published a confirmed market-wide figure. PAC evidence

**OUR READING**

**Market pass (our reading):** the shift is from extending deadlines towards judging performance, and the self-build route points to more developer control over connection works over time (Probable). Until the inquiry reports, grid dates stay uncertain; the announcement gave no formal terms of reference or timetable, so the timing of any change is Tentative.

**BUSINESS ANGLE**

**Commercial pass (our reading): Developers** whose connection dates have been pushed back, or whose new offers come with later dates, may need to rethink their land, consents, finance and long-lead orders. **Consultants and design engineers** could see more demand for offer reviews, connection strategy and self-build design. **Equipment and installation suppliers** face schedule risk wherever grid dates slip. We didn't see a related tender (Tentative).

**LOOK OUT FOR**

Inquiry scope and timetable; NESO's Construction Planning Assumptions detail; the December incentive consultation; Phase 1 distribution offers expected by 30 Nov and Phase 2 offers due by 31 Jan 2027. Ofgem 2 Oct

**HOW CLOSE TO WORK?** ●—○—○—○ **Signal** Regulatory stance only; no procurement.

## 2 Balancing costs overshoot forecast, with the gap pushed into later tariffs

**REPORTED**

NESO's October outturn: balancing costs £740m against a £390m month-ahead forecast and £541m in September; constraint costs 65% (£200m) above forecast. NESO cites factors including high wind, lower demand and higher wholesale prices. The estimated BSUoS charge was £35.68/MWh against a £19.75/MWh forecast. NESO Oct outturn On 12 Nov a NESO economics piece set out £3.9bn of thermal constraint costs for 2027 (2025/26: £2.0bn) and a £4.2bn–£7.7bn range for 2030 depending on scenario, calling network delivery "the single biggest structural lever". NESO 12 Nov The Telegraph (20 Nov) reports a time-limited increase in NESO's working-capital facility from £700m to £1.7bn; Telegraph 20 Nov NESO's Q&A log says the forecast deficit is intended to be recovered over Fixed Tariffs 9 and 10, avoiding a reset within Fixed Tariff 8. NESO Q&A

**OUR READING**

**Market pass (our reading):** a bigger facility smooths cash; it does not remove the cost. On NESO's stated intention, higher recovery in later tariffs looks likely (Probable), but the size and timing were not published in what we read. The facility figures rest on press reporting; no NESO notice was found.

**BUSINESS ANGLE**

**Commercial pass (our reading): business energy buyers** on pass-through or flexible contracts are exposed to rising system charges; how much reaches any company depends on contract terms, which we did not assess. **Energy-cost advisers and suppliers of flexibility, storage or on-site generation** may find a stronger case to make, though constraints stem from network limits that on-site assets only partly address (Tentative).

**LOOK OUT FOR**

NESO's November outturn and any detail on recovery in Fixed Tariffs 9 and 10 (dates not verified); network outages, which NESO estimates add 16% to 2027 constraint costs. NESO 12 Nov

**HOW CLOSE TO WORK?** ●—○—○—○ **Signal** Cost pressure; no buying activity.

## 3 Transmission build: two consents, two preferred sites and one construction start

**REPORTED**

On 18 Nov SSEN Transmission welcomed Scottish Ministers' consent, on appeal, for the Carnaig (Highlands) and Hurlie (Aberdeenshire) 400kV substations. SSEN 18 Nov BBC 18 Nov On 17 Nov it named Cruchie, north-east of Huntly, as preferred site for the Strathbogie Hub (an HVDC converter station and 400kV substation for the proposed Shetland HVDC link 2), with public events on 7–9 Dec. SSEN 17 Nov On 19 Nov it named Tipperty, south of Ellon, as preferred site for a 400/132kV South Formartine substation, part of the Peterhead to Kintore Upgrade (about 51km of 275kV line reconductored to run at 400kV); an information event follows in Ellon on 3 Dec. SSEN 19 Nov On 18 Nov National Grid Electricity Transmission began main construction of a 400kV substation near Woolavington, Somerset, to connect the Gravity Smart Campus, including the Agratas battery factory. Balfour Beatty is the contractor; three supergrid transformers are due on site in early 2027, and main construction is expected to run into summer 2029. National Grid 18 Nov NGET Woolavington

**OUR READING**

**Market pass (our reading):** consents and site choices clear gates; they are not contract awards. The BBC says Carnaig is part of the proposed Spittal–Loch Buidhe–Beauly 400kV line, BBC 18 Nov whose consent status we did not check. Woolavington is the odd one out: demand-led connection for new industry, already contracted. NESO ties lower constraint costs to network delivery, NESO 12 Nov which is why these milestones matter beyond the sites themselves (Probable).

**BUSINESS ANGLE**

**Commercial pass (our reading):** Woolavington's main contract is placed with Balfour Beatty, so the route in is its supply chain (equipment deliveries, steelwork, civils support, welfare, logistics), not National Grid directly. For Carnaig, Hurlie, Strathbogie and South Formartine, **suppliers and service companies** (civils, surveying, ecology and environmental consultancy, traffic management, plant hire, accommodation) typically get in by subcontract once main contractors are named; SSEN Transmission's contracting routes were not seen (Tentative).

**LOOK OUT FOR**

SSEN Transmission's Peterhead to Kintore events (30 Nov–2 Dec), the Ellon event (3 Dec) and Strathbogie events (7–9 Dec); any procurement or supplier-engagement notice for the Scottish sites. SSEN 19 Nov SSEN 17 Nov

**HOW CLOSE TO WORK?** ●●●○ **Cleared** Carnaig and Hurlie cleared; two sites still being shaped; Woolavington already placed.

## 4 Rooftop solar sets a single-year installation record

**REPORTED**

On 20 Nov DESNZ said new MCS data show 2026 has broken the record for solar installations in a single year, with over 270,000 fitted across the UK and over a month still to go. The MCS data cover certified installations of up to 50 kW; DESNZ official data confirming the record are due in December. MCS said it has redeveloped its installer scheme around quality, as it becomes a consumer protection body, and pointed to the Future Homes Standard. Solar Energy UK expects more than 300,000 MCS-certified installations by year end, citing the Warm Homes Loan Scheme and rules effectively mandating solar for new homes and buildings. DESNZ 20 Nov

**OUR READING**

**Market pass (our reading):** the demand signal is strong and dated, but the headline is MCS data, with the official confirmation still to come. New-build rules and cheap finance point to the run continuing into 2027 (Probable). The release gives no regional split, so where the work is concentrated is not given.

**BUSINESS ANGLE**

**Commercial pass (our reading): MCS-certified installers, distributors and panel, inverter and battery suppliers** are the direct beneficiaries; **housebuilders' installation partners** should watch the new-build rules. MCS's tighter installer scheme may raise the compliance bar for installers (Tentative; scheme details were not read).

**LOOK OUT FOR**

DESNZ's official solar data in December; the final 2026 MCS total. DESNZ 20 Nov

**HOW CLOSE TO WORK?** ●○○○ **Signal** Demand data; no single buyer.

## 5 Stability-services licence and renewables auction: rules reset, dates long

**REPORTED**

On 20 Nov Ofgem opened a call for input on a future licence for dedicated network services, closing 12 Jan 2027; the framework depends on the Energy Independence Bill becoming law. Ofgem 20 Nov NESO's Long-term 2029 stability tender closed to submissions on 1 Jun 2026; assessment is under way, with a 4 Feb 2027 backstop for final connections evidence and contract award in July 2027, subject to change. NESO tender rules NESO LT2029 On 19 Nov DESNZ set out the approach for Allocation Round 8: prices across all wind and solar technologies will be visible to ministers before projects are chosen, and initial budgets are a notional £1, with final budgets set after bids. DESNZ 19 Nov

**OUR READING**

**Market pass (our reading):** who can earn from system-stability services, and how, is being formalised, but the licence needs legislation and the first long-term tender is about eight months from award. For AR8, no budget size, bidding window or volume is public in what we read, so the capacity it will buy cannot be inferred.

**BUSINESS ANGLE** **Commercial pass (our reading):** stability assets are large and bidders are network owners and service providers, so the work for others is engineering studies, grid-code compliance, consenting support and specialist operations and maintenance. **Developers and bid consultancies** may need AR8 support once a window is known. No open tender route for suppliers, installers or service companies was seen (Tentative).

**LOOK OUT FOR** The 12 Jan 2027 close; NESO's award (planned July 2027); the AR8 timetable and final budgets; the Energy Independence Bill's progress. Ofgem 20 Nov · NESO tender rules · DESNZ 19 Nov

**HOW CLOSE TO WORK?** ●●○○ **Shaping** Policy and tender pipeline; no open bid route.

## Where the Work Is

Opportunities grouped by who is buying. The track shows how far each has progressed; the grade shows how well the evidence supports it.

| OPPORTUNITY AND BUYER | STAGE | GRADE | WHO FITS, AND HOW IN |
|---|---|---|---|
| **Carnaig and Hurlie 400kV substations**<br>SSEN Transmission and its main contractors | ●●●● **Cleared** | B | Civils, groundworks, ecology and environmental consultancy, survey, traffic management, plant, welfare and local logistics. Subcontract route; contracting arrangements not seen. SSEN 18 Nov |
| **Strathbogie Hub and South Formartine substation**<br>SSEN Transmission | ●●○○ **Shaping** | B | Early-stage: consultation, survey, environmental and community-engagement support. Preferred sites chosen; events 3 Dec (Ellon) and 7–9 Dec; planning and procurement dates not seen. SSEN 17 Nov · SSEN 19 Nov |
| **Woolavington 400kV substation, Somerset**<br>National Grid Electricity Transmission; Balfour Beatty (contractor) | ●●●● **Placed** | A | Main contract placed. Any route is through the contractor's supply chain; transformer deliveries due early 2027, construction into summer 2029. National Grid 18 Nov · NGET Woolavington |
| **Rooftop solar (MCS-certified, up to 50 kW)**<br>Households, businesses and housebuilders | ●○○○ **Signal** | A | MCS-certified installers, distributors and equipment suppliers. Record 2026 volumes; official DESNZ data due in December. DESNZ 20 Nov |
| **Developers with re-dated grid connections**<br>Generation, storage and demand developers | ●○○○ **Signal** | B | Connection and project-development consultants, legal and finance advisers, design engineers. Direct sales; demand is our inference from Ofgem's stance. Ofgem 19 Nov |
| **Developer self-build of transmission connections**<br>Developers, via an independent transmission owner licence | ●●○○ **Shaping** | B | Design, build and consenting support if the route opens. Ofgem says it will implement it; no timetable seen. Ofgem 19 Nov |
| **Stability and voltage services (licence and NESO tender)**<br>NESO; bidders include network owners and service providers | ●●○○ **Shaping** | A | Indirect only: power-systems studies, compliance, consenting and specialist O&M for bidders. Submissions closed 1 Jun 2026; award planned July 2027. NESO tender rules · Ofgem 20 Nov |
| **CfD Allocation Round 8 bidders**<br>Renewable developers | ●●○○ **Shaping** | B | Bid, pricing and commercial consultancies; specialist engineering and environmental consultancies. Wait for the AR8 timetable. DESNZ 19 Nov |
| **Strathaven–Smeaton, EGL3 converter civils, EGL4 early funding, Moray West licence**<br>SPEN, NGET and SPT, Ofgem | ●●●● **Placed** | A | Already contracted or being funded (M Group on Strathaven–Smeaton, in construction, due June 2028; BAM on EGL3 civils; Ofgem consulting to 20 Dec on a further 1.5% of EGL4 cost as early-construction funding, 14.6% in total; Moray West is an ownership licence). Not new opportunities. SPEN 16 Nov · National Grid 9 Nov · Ofgem 17 Nov · Ofgem 18 Nov |

"How in" reflects routes the sources themselves mention (frameworks, main contractors, supplier engagement, direct sales) plus our labelled reading. It does not mean any contract is being let. Rows marked Placed are included so you do not spend time chasing them.

## Dates for the Diary

Dated items that could change the picture.

| | |
|---|---|
| **23 Nov** | Today: Elexon consultation CP1653 closes (cuts the minimum lead time for MSID Pair Allocations from five working days to one, relevant to flexibility participation). Elexon news |
| **By 25 Nov** | Ofgem announces the 1 Jan–31 Mar 2027 price cap. Ofgem price cap |
| **30 Nov** | Gate 2 Phase 1 distribution offer completion expected, per Ofgem's agreed timetable. Ofgem 2 Oct |
| **30 Nov–2 Dec** | SSEN Transmission Peterhead to Kintore overhead line consultation events: Kintore (30 Nov), Peterhead (1 Dec), Aberdeen (2 Dec). SSEN 19 Nov |
| **3 Dec** | South Formartine substation information event, Ellon. SSEN 19 Nov |
| **7–9 Dec** | Strathbogie Hub events: Huntly (7), Forgue (8), Rothiemay (9). SSEN 17 Nov |
| **December** | Ofgem to consult on the RIIO-3 connections incentive baseline; DESNZ official solar data due. Neither has a published day. Ofgem 19 Nov DESNZ 20 Nov |
| **11 Dec** | Elexon P517 consultation closes (CVA chargeable volumes reporting to EMRS; issued 23 Nov). Elexon news |
| **16 Dec** | Elexon consultation closes on removing the control that stops negative GSP Group Correction Factor values being used in settlement. Elexon news |
| **20 Dec** | Ofgem's EGL4 early-construction funding consultation closes; responses published January 2027, outcome February 2027. Ofgem 17 Nov |
| **12 Jan 2027** | Ofgem's dedicated network services licence call for input closes. Ofgem 20 Nov |
| **31 Jan 2027** | Gate 2 Phase 2 connection offers due; Ofgem's February Infrastructure Progress Report follows. Ofgem 2 Oct Ofgem 19 Nov |
| **July 2027** | Planned NESO LT2029 contract award (indicative). NESO tender rules |

## What We Couldn't Confirm

Gaps and limits on this issue. Nothing below has been filled in with a guess.

- Ofgem's inquiry terms of reference and timetable were not on the announcement page.
- Reported increases in Gate 2 connection-works costs come from industry written evidence to the Public Accounts Committee, not from NGET, NESO or Ofgem. No official market-wide figure was found.
- The NESO working-capital increase (£700m to £1.7bn) comes from press reporting; no NESO notice was found, and the article page itself did not load on 23 Nov (its text was confirmed through a search index).
- Ofgem's EGL4 listing summary names NGET and SHET, but the consultation page and document name NGET and SPT. We use the consultation document.
- Woolavington's contract value and package breakdown were not published in what we read.
- Procurement routes for Carnaig, Hurlie, Strathbogie and South Formartine were not found, nor the consent status of the associated overhead line.
- The solar record rests on MCS data quoted by DESNZ; official DESNZ figures are due in December, and no regional split was given.
- Ofgem's 20 Nov note on prioritising transmission charging modifications was seen at listing level only.
- AR8's application window and £ budgets were not available.
- One National Grid item (9 Nov), two NESO items (12 Nov and the 21 Oct Q&A entries) and Ofgem's 2 Oct timetable letter predate this week and are used as context only.
- Price data: only the previous 14 days are used as a baseline, settlement runs are initial, System Price is not the same measure as wholesale-index averages, and no causation analysis was done.
- This issue comes from a targeted scan of Ofgem, NESO, DESNZ/GOV.UK, SSEN Transmission, SP Energy Networks, National Grid and Elexon on 23 Nov. It was not a full crawl of each site; the SP Energy Networks news listing did not load, though its 16 Nov notice did.

**EVIDENCE GRADES**

- **A** Primary source (regulator, operator, government, data feed) states it directly.
- **B** Primary source, but only partly read or our statement needs an inference.
- **C** Press or other secondary report only; treat with care.
- **D** Unverified; shown only if flagged. None this week.

**PROGRESS TRACK**

- **Signal** — a trend or stance, no buying activity
- **Shaping** — policy, site or tender being designed
- **Cleared** — consent or funding secured
- **Placed** — contract awarded or in build

# Source Library

Every tag in the text matches a row here. Read on 23 November 2026 (UK time).

| TAG | GRADE | DOCUMENT | URL |
|---|---|---|---|
| Ofgem 19 Nov | A | Ofgem: Grid connections delays: inquiry into phase 1 projects to drive delivery and accountability (19 Nov 2026) | https://www.ofgem.gov.uk/news/grid-connections-delays-inquiry-phase-1-projects-drive-delivery-and-accountability |
| Ofgem 2 Oct | A | Ofgem: Agreement to a further alternative timetable for Gate 2 Phase 1 offers (2 Oct 2026) | https://www.ofgem.gov.uk/sites/default/files/2026-10/Ofgem-agreement-for-revision-to-G2TWQ-timetable.pdf |
| PAC evidence | B | Renewable Investors Group / House of Commons Public Accounts Committee: Written evidence CPU0008 to the inquiry Clean Power by 2030: Upgrading the Grid<br>Industry written evidence published by the Committee (listed 15 Oct 2026). Figures are the submitters' and have not been confirmed by NGET or Ofgem. | https://committees.parliament.uk/writtenevidence/169990/html/ |
| NESO Oct outturn | A | NESO: BSUoS Outturn for Oct-26 | https://www.neso.energy/document/390226/download |
| NESO BSUoS | A | NESO: Balancing Services Use of System (BSUoS) charges (who pays; CMP308 and CMP361 from 1 April 2023) | https://www.neso.energy/charging/balancing-services-use-system-bsuos-charges |
| NESO BSUoS guide | A | NESO: Introduction to Balancing Services Use of System Charges (BSUoS), guidance document, February 2025<br>From 1 April 2023, over/under-recovery feeds into a later fixed tariff (CMP361). | https://www.neso.energy/document/356956/download |
| NESO 12 Nov | A | NESO: The Balancing Act (Part 3: Projections) (12 Nov 2026) | https://www.neso.energy/news/balancing-act-part-3-projections |
| NESO Q&A | A | NESO: Transparency Forum Q&A log (entries dated 21 Oct 2026) | https://www.neso.energy/document/389296/download |
| Telegraph 20 Nov | C | The Telegraph: Grid operator handed £1bn Treasury loan to meet soaring wasted wind costs (20 Nov 2026)<br>Secondary source. Article page timed out on 23 Nov; headline, date and figures confirmed via search index. | https://www.telegraph.co.uk/business/2026/11/20/grid-operator-handed-1bn-treasury-loan/ |
| SSEN 18 Nov | A | SSEN Transmission: SSEN Transmission welcomes approval of two critical substation projects (18 Nov 2026) | https://www.ssen-transmission.co.uk/news/news--views/2026/11/ssen-transmission-welcomes-approval-of-two-critical-substation-projects/ |
| BBC 18 Nov | C | BBC News: Ministers approve two controversial electricity substations (18 Nov 2026)<br>Secondary source; used for local-authority refusals and line context. | https://www.bbc.co.uk/news/articles/c6y80xj0v94zo |
| SSEN 17 Nov | A | SSEN Transmission: SSEN Transmission identifies preferred site for Strathbogie Hub (17 Nov 2026) | https://www.ssen-transmission.co.uk/news/news--views/2026/11/ssen-transmission-identifies-preferred-site-for-strathbogie-hub/ |
| SSEN 19 Nov | A | SSEN Transmission: SSEN Transmission identifies preferred site for new South Formartine substation (19 Nov 2026) | https://www.ssen-transmission.co.uk/news/news--views/2026/11/ssen-transmission-identifies-preferred-site-for-new-south-formartine-substation/ |
| National Grid 18 Nov | A | National Grid: National Grid starts construction on Somerset substation supporting over 4,500 new jobs (18 Nov 2026) | https://www.nationalgrid.com/national-grid-starts-construction-somerset-substation-supporting-over-4500-new-jobs |
| NGET Woolavington | A | National Grid: Woolavington Substation project page (read 23 Nov 2026) | https://www.nationalgrid.com/electricity-transmission/network-and-infrastructure/infrastructure-projects/woolavington-substation |
| DESNZ 20 Nov | A | DESNZ / GOV.UK: Sports stadiums and supermarkets drive 2026 solar revolution (20 Nov 2026)<br>Quotes MCS data (installations up to 50 kW); official DESNZ data due December. | https://www.gov.uk/government/news/sports-stadiums-and-supermarkets-drive-2026-solar-revolution |
| Ofgem 20 Nov | A | Ofgem: Next steps on the Dedicated Network Services Licence, call for input (20 Nov 2026) | https://www.ofgem.gov.uk/call-for-input/next-steps-dedicated-network-services-licence |
| NESO tender rules | A | NESO: LT2029 Instructions to Tenderers, ITT stage, V5 (indicative timeline) | https://www.neso.energy/document/365156/download |

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|---|---|---|---|
| NESO LT2029 | A | NESO: Long-term 2029 Tender (page read 22 Nov 2026) | https://www.neso.energy/industry-information/balancing-services/stability-market/long-term-2029-tender |
| DESNZ 19 Nov | A | DESNZ / GOV.UK: New clean power renewables auction launched to lower bills (19 Nov 2026) | https://www.gov.uk/government/news/new-clean-power-renewables-auction-launched-to-lower-bills |
| SPEN 16 Nov | A | SP Energy Networks: Moving a strategic Clean Power 2030 reinforcement into delivery (16 Nov 2026) | https://www.spenergynetworks.co.uk/news/pages/moving_a_strategic_clean_power_2030_reinforcement_into_delivery.aspx |
| National Grid 9 Nov | A | National Grid: Eastern Green Link 3 reaches major milestone with appointment of construction partner (9 Nov 2026) | https://www.nationalgrid.com/eastern-green-link-3-reaches-major-milestone-appointment-construction-partner |
| Ofgem 17 Nov | A | Ofgem: EGL4 statutory consultation on early construction funding and proposed modification to Special Condition 3.21 (17 Nov 2026) | https://www.ofgem.gov.uk/sites/default/files/2026-11/egl4-consultation.pdf |
| Ofgem 18 Nov | A | Ofgem: Notice of determination to grant a licence: TC Moray West OFTO Limited (18 Nov 2026) | https://www.ofgem.gov.uk/sites/default/files/2026-11/notice-of-determination-to-grant-a-licence-moray-west.pdf |
| Ofgem price cap | A | Ofgem: Changes to energy price cap, 1 Oct–31 Dec 2026 (26 Aug 2026; lists next announcement dates) | https://www.ofgem.gov.uk/news/changes-energy-price-cap-between-1-october-and-31-december-2026 |
| Elexon news | B | Elexon: BSC news and consultations listing (CP1653; GSP Group Correction Factor consultation; P517)<br>Listing page read 23 Nov. | https://www.elexon.co.uk/bsc/news-events/ |
| Ofgem charging letter | B | Ofgem: Transmission charging code modifications update (20 Nov 2026)<br>Listing page only; open letter not read. Not relied on in the text. | https://www.ofgem.gov.uk/policy/transmission-charging-code-modifications-update |
| Elexon data | A | Elexon: BMRS Insights API, balancing/settlement/system-prices/{date}, 2–22 Nov 2026, pulled 23 Nov 2026<br>Initial-run data, so provisional. | https://data.elexon.co.uk/bmrs/api/v1/balancing/settlement/system-prices/{date} |
| Elexon CP1653 | A | Elexon: CP1653 Change Proposal Consultation, reducing the minimum lead time for MSID Pair Allocations (responses by 17:00 on 23 Nov 2026)<br>Re-fetched 23 Nov. The related change-proposal page still shows a 20 Nov response date; this consultation page is the live invitation. | https://www.elexon.co.uk/bsc/consultation/cp1653-change-proposal-consultation/ |
| Elexon P517 | A | Elexon: P517 Assessment Procedure Consultation, reporting to EMRS of chargeable volumes for CVA Metering Systems (issued 23 Nov 2026; closes 17:00 on 11 Dec 2026) | https://www.elexon.co.uk/bsc/consultation/p517-assessment-procedure-consultation-reporting-to-emrs-of-chargeable-volumes-for-cva-metering-systems/ |
| DESNZ 23 Nov | A | DESNZ / GOV.UK: Warm Home Discount, insulation and microgeneration measures, consultation (published 23 Nov 2026; closes 11:59pm on 20 Dec 2026) | https://www.gov.uk/government/consultations/warm-home-discount-insulation-and-microgeneration-measures |
| NESO SBC | A | NESO: Storage behind constraints, consultation on treatment of storage during active transmission constraints (closes 17:00 on 26 Nov 2026)<br>Close date also stated on NESO's skip-rates page and calendar entry, re-fetched 23 Nov. | https://www.neso.energy/document/389366/download |
| NESO 26 Nov | A | NESO: Consultation drop-in session, Dynamic Response (26 Nov 2026, 13:00–14:00) | https://www.neso.energy/calendar/consultation-drop-session-dynamic-response |

## Please note

Compiled from public sources. It is general market information, not investment, legal or procurement advice. Facts carry dated source tags; market and commercial passes are labelled as our reading and should be checked before commercial decisions.