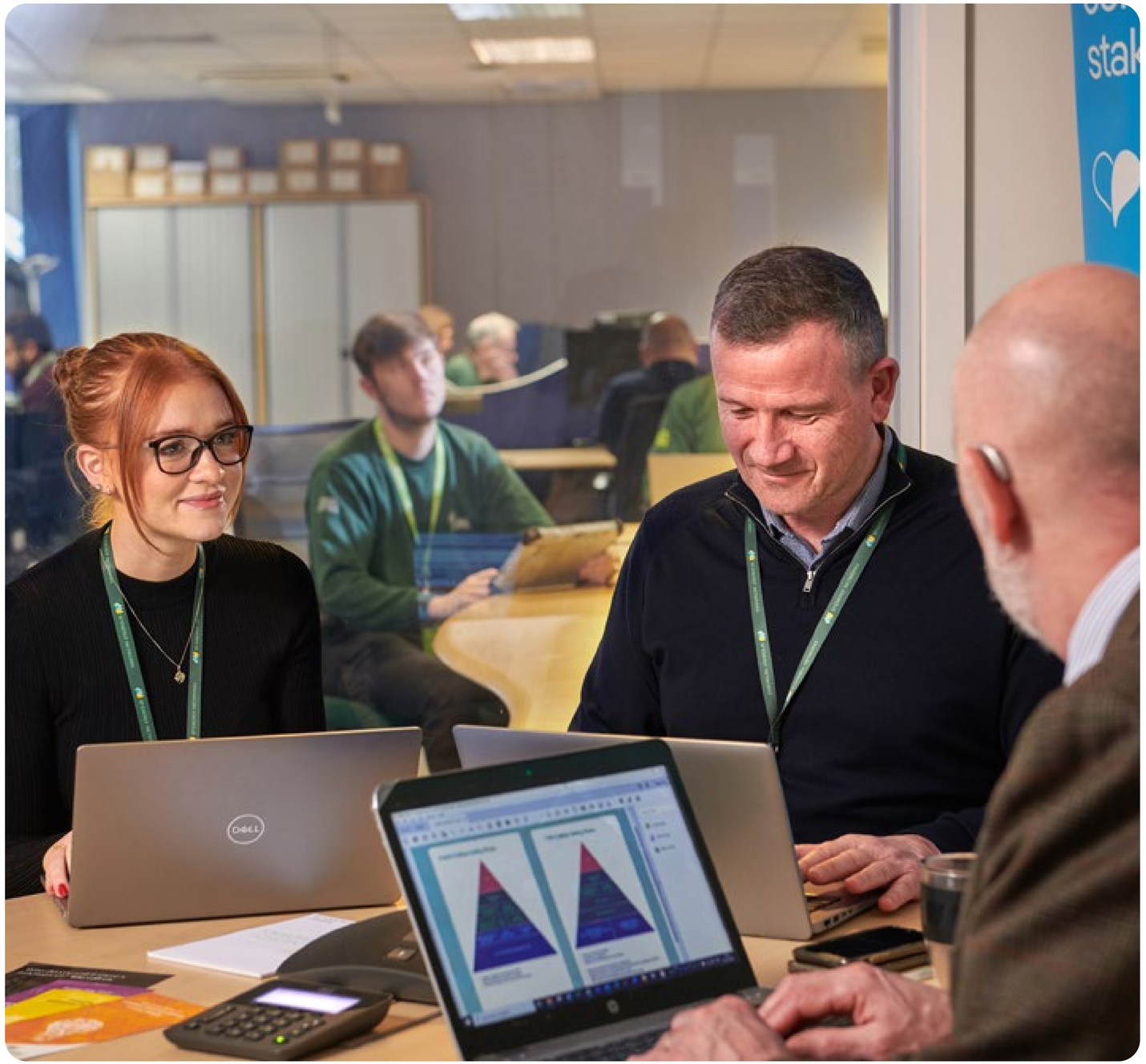
SP Energy Networks

# Major Connections Annual Report 2024/25



SP Energy Networks

# Contents

# I am pleased to introduce the second edition of our Major Connections Annual Report, providing an important update on the progress we have made over the past year to enhance the experience of our Major Connections customers.

As a Distribution Network Operator (DNO), SP Energy Networks plays a vital role in enabling the UK's energy transition. This role has become even more pivotal as we continue to evolve into a more dynamic Distribution System Operator (DSO). Over the past 12 months, we've not only delivered thousands of connections across our two licence areas, but also remained at the forefront of industry reform to help accelerate the transition to a cleaner, greener electricity system.

## Driving Reform to Unlock a Net Zero Future

A key development this year has been the introduction of Ofgem's Connections Reform, which represents a significant transformation in how applications are managed and progressed across the industry. SP Energy Networks is committed to supporting customers through this transition, ensuring clarity, responsiveness, and a continued focus on delivery.

Alongside this, the implementation of the Access Significant Code Review (SCR) has had a tangible impact—reducing upfront reinforcement costs for customers and making it easier to progress with both demand and generation connections. These reforms are already unlocking previously constrained projects and enabling quicker delivery across our network.

## A Unique Position Across the UK

Operating as the only DNO with licence areas in Scotland, England, and Wales, we recognise the distinct regional challenges and opportunities in delivering a decarbonised future. Across our SP Distribution and SP Manweb licence areas, we continue to collaborate closely with the Electricity System Operator and SP Transmission to align on strategic planning, infrastructure investment, and project delivery.

This year, we've continued to experience growing demand for large-scale distributed generation and a notable increase in low voltage solar connections, especially from domestic and commercial customers scaling up their installations. We continue to progress applications through our 'fast track' processes in line with industry best practice and continue to refine these to deliver a more efficient and consistent customer journey.

## Customer-Focused, Digitally Enabled

Our RIIO-ED2 Major Connections Strategy is built on the digitalisation of services and a strong customer-centric approach. In this report, we share feedback received through our Major Connections Customer Satisfaction Survey, alongside performance insights on quotation timescales and project delivery.

This feedback has been instrumental in guiding how we evolve our services—ensuring our operations align with customer expectations, and that we remain responsive, agile, and transparent in all that we do.

## Looking Ahead

At SP Energy Networks, we are proud to be an innovative, customer-focused organisation, committed to helping the UK meet its Net Zero targets. We understand that our Major Connections customers are at the heart of this transition—working to decarbonise industry, transport, and heat.

Over the coming year, we will continue to act on the insights we receive, support implementation of national reforms, and invest in new digital and operational capabilities that ensure we remain a key enabler for a smarter, greener energy future.

Nicola Connelly
CEO, SP Energy Networks

# Introduction

The UK's transition to Net Zero economy is accelerating, and with it, the role of Distribution Network Operators is becoming more central than ever. At SP Energy Networks, we are enabling this transformation by facilitating timely, efficient, and future ready connections to the electricity network – particularly for large scale and strategically important projects.

This Annual Major Connections Report presents our performance and progress over the 2024/25 regulatory year, highlighting how we continue to meet the needs of major connection customers while adapting to a fast-charging energy system. From utility-scale renewables and battery storage to data centres and EV charging networks, the demand for high-capacity, high voltage connections are growing rapidly.

## Our Commitment

Major connections often involve complex technical, planning, and commercial challenges. These projects require clear communication, flexible design, and a strong understanding of both customer needs and wider system impacts. We are committed to delivering services that not only are compliant with regulatory standards, but also shaped by stakeholder feedback and aligned with national and local decarbonisation goals.

## A Year of Transition and Innovation

In 2024/25, SP Energy Networks saw a continued shift towards low-carbon technologies and smarter systems. We strengthened collaboration with developers and placed greater emphasis on digital tools to enhance the customer journey. Our response included a focused programme of innovation, investment, and operational reform to meet these evolving demands.

## Purpose of This Report

This report provides:

- A detailed summary of the major connections delivered in 2024/25.
- Key performance metrics including quotation timescales.
- Customer satisfaction results.
- Updates on innovation and process improvements.
- A forward-looking view of how we are preparing for future growth and complexity.

By sharing this information transparently, we aim to build confidence, improve outcomes, and help our customers and partners connect to the grid with clarity and certainty.

# Summary of Major Connections

In the 2024/25 reporting period, SP Energy Networks continued to prioritise transparency, responsiveness, and efficiency in delivering timely quotations for major connections. We maintained our focus on meeting Ofgem's Time to Quote (TTQ) standards, ensuring customers received accurate and comprehensive quotes.

Across both SP Distribution and SP Manweb licence areas, we delivered a high proportion of quotations within the statutory time limits, reflecting ongoing improvements in process automation, internal coordination, and customer engagement. We also introduced several enhancements to our connections journey, including improved communication during pre-application stages and greater clarity around offer content, which contributed to a more streamlined customer experience.

Looking ahead, SP Energy Networks remains committed to further reducing quote lead times by investing in digital tools, agile resource planning, and more efficient internal workflows. In the coming year, we will also be introducing new digital self-service tools designed to support customers through the application and quotation process – making it easier to obtain information, track progress, and engage with our teams throughout their connections journey.

## Time to Quote

The tables below show the average number of days it takes for us to quote in each of the relevant market segments. This is shown as SLC15A for quotations where the contestable works are included and SLC15 for quotes for the non-contestable elements only. The difference between these two classifications and the associated timescales for each come directly from our Standard Licence Conditions (SLC) as a licenced and regulated distribution operator.

The tables are split by whether the relevant market segment is subject to the reputational or financial element of the Major Connections Incentive.

**SPD,** FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)

| MCTTQ | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Metered Demand HV and EHV | SLC15A | 90 | 49.8 | *-40* |
| | SLC15 | 63 | 33.3 | *-30* |
| Metered Demand EHV and above | SLC15A | 63 | 56.4 | *-7* |
| | SLC15 | 47 | 38.1 | *-9* |
| Unmetered Other | SLC15A | 13 | 7.5 | *-5* |
| | SLC15 | n/a | n/a | n/a |
| Unmetered Local Authority | SLC15 | n/a | n/a | n/a |
| | SLC15A | 9 | 7.8 | *-1* |
| Unmetered PFI | SLC15 | n/a | n/a | n/a |

**SPD,** REPUTATIONAL (non-contestable SLC15)

| MCTTQ | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Unmetered Local Authority | SLC15 | 10 | 9.1 | *-1* |
| Unmetered PFI | SLC15 | 16 | 14.9 | *-1* |
| Distributed Generation LV | SLC15 | 20 | 17.3 | *-3* |
| Distributed Generation HV and EHV | SLC15 | 37 | 37.1 | 0 |

**SPM,** FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)

| MCTTQ | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Metered Demand LV | SLC15A | 18 | 14 | *-4* |
| | SLC15 | 9 | 9 | 0 |
| Metered Demand HV | SLC15A | 24 | 22 | *-2* |
| | SLC15 | 13 | 14 | 1 |
| Metered Demand HV and EHV | SLC15A | 64 | 56 | *-8* |
| | SLC15 | 22 | 25 | 3 |
| Metered Demand EHV and above | SLC15A | 52 | 46 | *-6* |
| | SLC15 | 38 | 50 | 12 |
| Distributed Generation LV | SLC15A | 22 | 21 | *-1* |
| | SLC15 | n/a | n/a | n/a |
| Distributed Generation HV and EHV | SLC15A | 47 | 49 | 2 |
| | SLC15 | 35 | 35 | 0 |
| Unmetered Other | SLC15A | 10 | *7* | *-3* |
| | SLC15 | 0 | 12 | 12 |

**SPM,** REPUTATIONAL (non-contestable SLC15)

| MCTTQ | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Unmetered Local Authority | SLC15 | 14 | 0 | *-14* |
| Unmetered PFI | SLC15 | n/a | n/a | n/a |

## Time to Connect

The tables below show the average number of days it takes from acceptance of the quotation to eventual connection in each of the relevant market segments. This is shown as SLC15A for schemes where we deliver both contestable and non-contestable works and SLC15 for schemes where we deliver the non-contestable elements only.

The tables are split by whether the relevant market segment is subject to the reputational or financial element of the Major Connections Incentive. It is important to note this full duration is inclusive of all elements of the delivery of the scheme including any planning consents for all works.

**SPD,** FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)

| MCTTC | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Metered Demand HV and EHV | SLC15A | n/a | n/a | n/a |
| | SLC15 | n/a | n/a | n/a |
| Metered Demand EHV and above | SLC15A | 889 | 202 | *-687* |
| | SLC15 | n/a | n/a | n/a |
| Unmetered Other | SLC15A | 24 | 66.6 | 43 |
| | SLC15 | n/a | n/a | n/a |
| Unmetered Local Authority | SLC15 | n/a | n/a | n/a |
| | SLC15A | 42 | 34.4 | *-8* |
| Unmetered PFI | SLC15 | n/a | n/a | n/a |

**SPD,** REPUTATIONAL (non-contestable SLC15)

| MCTTC | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Metered Demand LV | SLC15 | 178 | 180.3 | 2 |
| Metered DemandHV | SLC15 | 316 | 466.6 | 150 |
| Distributed Generation LV | SLC15 | 261 | 194.6 | *-67* |
| Distributed Generation HV and EHV | SLC15 | 370 | 401.5 | 32 |

**SPM,** FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)

| MCTTC | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Metered Demand LV | SLC15A | 124 | 124 | 0 |
| | SLC15 | 227 | 176 | -51 |
| Metered Demand HV | SLC15A | 201 | 223 | 22 |
| | SLC15 | 353 | 375 | 22 |
| Metered Demand HV and EHV | SLC15A | 885 | n/a | *-885* |
| | SLC15 | 416 | n/a | *-416* |
| Metered Demand EHV and above | SLC15A | 2,372 | 528 | *-1,844* |
| | SLC15 | 343 | n/a | *-343* |
| Distributed Generation LV | SLC15A | 83 | 118 | 35 |
| | SLC15 | n/a | n/a | n/a |
| Distributed Generation HV and EHV | SLC15A | 134 | 463 | 330 |
| | SLC15 | 332 | 293 | -29 |
| Unmetered Other | SLC15A | 66 | 67 | 1 |
| | SLC15 | n/a | n/a | n/a |

**SPM,** REPUTATIONAL (non-contestable SLC15)

| MCTTC | | 2023/24 | 2024/25 | Difference |
|---|---|---|---|---|
| Unmetered Local Authority | SLC15 | n/a | n/a | n/a |
| Unmetered PFI | SLC15 | n/a | n/a | n/a |

# Customer Engagement and Satisfaction

At SP Energy Networks, we recognise that the success of our major connections services relies not only on the timely delivery of infrastructure, but also on the quality of the relationships with our customers. Our approach to customer engagement is built around early dialogue, transparent and clear communication, and a strong commitment to continuous improvement informed by stakeholder feedback.

Over the past 12 months, we have been carefully analysing customer feedback to gain deeper insight into how we can better meet the needs of the communities we serve. This feedback has been invaluable in helping us identify areas for improvement across our services.

One of the key areas highlighted was the functionality and accessibility of our website. In direct response to this feedback, we have initiated a comprehensive review and full redesign of the site to deliver a more intuitive, informative, and accessible user experience. This work is now well underway and is on track to be completed by the end of the year.

We are also maintaining regular engagement with our stakeholders throughout this process – providing updates at key milestones and creating opportunities to gather further input and feedback. This ongoing dialogue ensures that the improvements we make are well-informed, transparent, and aligned with the expectations of the people and communities who reply on us.

SP Energy Networks remains fully committed to putting customers and stakeholders at the heart of what we do, using their feedback to shape meaningful improvements now and into the future.

# Major Connections Customer Satisfaction Survey Results

## Executive Summary

As part of our regulatory and stakeholder commitments, SP Energy Networks undertakes weekly Major Connections Customer Satisfaction Surveys to understand the experiences of our major connections customers and identify opportunities to improve our services.

In 2024/25, customer satisfaction continued to improve across all key areas of the connection journey. These results reflect the tangible impact of targeted initiatives aimed at simplifying the connection process, enhancing communication, and ensuring timely, professional delivery. This year, the survey captured feedback from a diverse customer base across SP Energy Networks two licenced distribution areas – SP Distribution (Central and Southern Scotland) and SP Manweb (Wales, Merseyside, Wirral & Mid Cheshire).

| | Financial Incentive | | Reputational Incentive | | Total Surveys (No.) | Total Overall Satisfaction |
|---|---|---|---|---|---|---|
| | *Surveys (No.)* | *Satisfaction* | *Surveys (No.)* | *Satisfaction* | | |
| **SP Distribution** | 56 | 9.27 | 345 | 8.81 | 401 | 8.87 |
| Connections quotation | 29 | 8.97 | 334 | 8.78 | 363 | 8.80 |
| Distributed Generation HV and above | | | 21 | 8.90 | 21 | 8.90 |
| Distributed Generation LV | | | 98 | 8.92 | 98 | 8.92 |
| Metered Demand HV | | | 111 | 8.59 | 111 | 8.59 |
| Metered Demand HV & EHV | 3 | 9.00 | | | 3 | 9.00 |
| Metered Demand LV | | | 104 | 8.85 | 104 | 8.85 |
| Unmetered Other | 25 | 8.92 | | | 25 | 8.92 |
| Metered Demand EHV and above | 1 | 10.00 | | | 1 | 10.00 |
| Connections completed | 27 | 9.59 | 11 | 9.45 | 38 | 9.55 |
| Distributed Generation LV | | | 1 | 9.00 | 1 | 9.00 |
| Metered Demand HV | | | 2 | 9.50 | 2 | 9.50 |
| Metered Demand LV | | | 8 | 9.50 | 8 | 9.50 |
| Unmetered Other | 27 | 9.59 | | | 27 | 9.59 |
| **SP Manweb** | 287 | 8.96 | | | 287 | 8.96 |
| Connections quotation | 241 | 8.96 | | | 241 | 8.96 |
| Distributed Generation HV and above | 8 | 8.13 | | | 8 | 8.13 |
| Distributed Generation LV | 90 | 9.04 | | | 90 | 9.04 |
| Metered Demand HV | 64 | 8.70 | | | 64 | 8.70 |
| Metered Demand HV & EHV | 1 | 10.00 | | | 1 | 10.00 |
| Metered Demand LV | 70 | 9.10 | | | 70 | 9.10 |
| Unmetered Other | 8 | 9.63 | | | 8 | 9.63 |
| Connections completed | 46 | 8.96 | | | 46 | 8.96 |
| Distributed Generation HV and above | 4 | 9.00 | | | 4 | 9.00 |
| Distributed Generation LV | 3 | 9.33 | | | 3 | 9.33 |
| Metered Demand HV | 17 | 8.82 | | | 17 | 8.82 |
| Metered Demand LV | 21 | 9.00 | | | 21 | 9.00 |
| Unmetered Other | 1 | 9.00 | | | 1 | 9.00 |
| **Grand Total** | **343** | **9.01** | **345** | **8.81** | **688** | **8.91** |

## Response Rate and Methodology

### Response Rate

The survey achieved a response rate of 14.3% in 2024/25, a modest increase from 2023/24 which was 11.0%.

### Overall satisfaction

**Highlights:**

Overall satisfaction (FI & RI) has increased by 0.46 in SPD (8.41 –> 8.87) and 0.54 in SPM (8.43 –> 8.96). Reflecting ongoing efforts to enhance customer engagement and streamline processes.

Communication and professionalism remain strong areas, with SPEN staff praised for their approachability, technical expertise, and proactive engagement.

Customers reported improved clarity and responsiveness during pre- application phase, largely attributed to updates and customer engagement events.

The upward trend across all categories demonstrates the effectiveness of customer-focused process reforms introduced in the past 12-18 months.

### Qualitative Feedback

**What Customers valued most:**

High-quality technical guidance and access to experienced engineers.

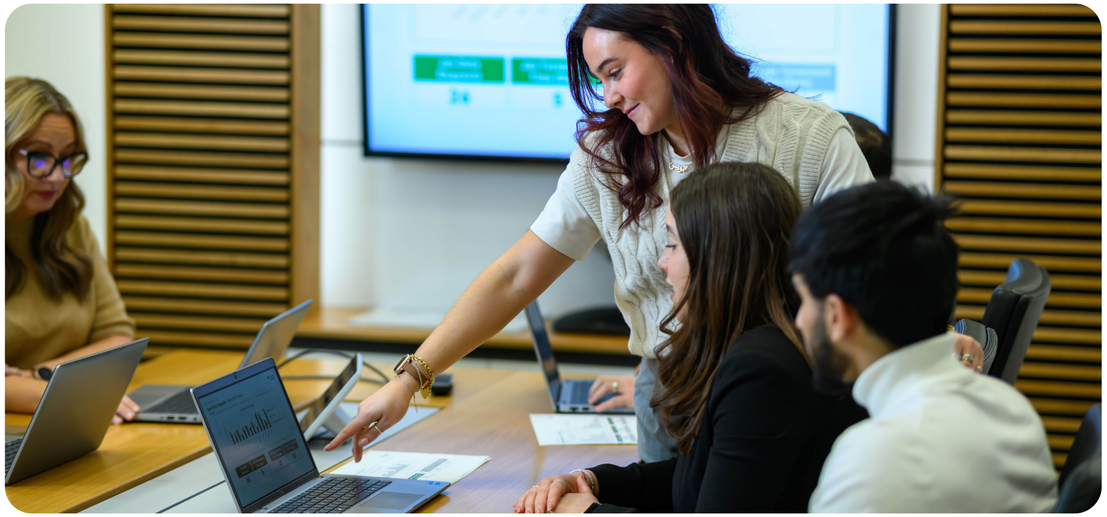
Consistent, proactive communication through single point of contact.

Enhanced digital tools, including improved self-serve guidance and project status updates.

### 2024/25 Improvements Delivered

In response to prior feedback and internal performance reviews, SP Energy Networks implemented several enhancements that have contributed to improved satisfaction levels:

| Initiative | Impact |
|---|---|
| Regular Connection Surgery sessions. | Improved early-stage customer engagement and issue resolution. |
| Enhanced training for customer-facing staff. | Raised technical and service standards across regions. |
| Streamlined internal governance on offers. | Reduced turnaround times for connection quotes. |
| Launch of Connection Customer Portal. | Real-time visibility of application and delivery status. |
| Deepen engagement with underrepresented customer segments. | Community-led schemes. |



## Response Rate and Methodology *continued*

### Next Steps and Commitments 2025/26

To continue driving performance improvements and supporting the Net Zero transition, we have identified the following priorities for the year ahead:

1. Advanced flexible and alternative connection options, particularly for generation customers facing network constraints.
2. Expand GIS-based self-service tools, giving customers earlier insights into network capacity and feasibility.
3. Improve interface with external parties, including local authorities and land agents, to reduce delays outside SPEN's direct control.
4. Strengthen post-connection support, ensuring smoother handovers and timely responses to emerging operational issues.
5. Deepen engagement with underrepresented customer segments, including new energy providers and community-led schemes.
6. Introduction of Local Authority Network Insight Tool (LANIT). LANIT tool aims to give Local Authorities an insight to our network with the most up-to-date connections information and network status. Stakeholders can carry out advanced power flow analysis at the click of a button to fully understand the potential works required in their decarbonisation plans. LANIT will carry out detailed studies and return expected costs for both the customer and the DNO if any network reinforcement is required.


### Conclusion

The results of the 2024/25 Major Connection Satisfaction Survey highlights steady progress in SPEN's delivery of high-quality, customer-focused connection services. The feedback confirms that recent strategic investments in digital tools, staff capability, and stakeholder engagement are translating into improved experiences for customers.

We recognise the critical role major connection customers play in delivering the UK's Net Zero ambitions. Our focus in 2025/26 remains on building trust, reducing barriers, and ensuring our services are transparent, agile, and fit for a decarbonised energy future.

# Future Outlook

SP Energy Networks is poised to play a pivotal role in the UK's transition to a low-carbon future, focusing on enhancing its major connections infrastructure. We continue to evolve our design and development strategy to meet the increasing demands for large-scale electricity connections.

The 2024/25 period brings unprecedented surge in connections demand, and also marks a critical phase where future-focused infrastructure planning, digital innovation, and customer-centric design principles are being embedded into every aspect of the major connections process.


## Future Outlook:

### Rising Demand, Strategic Design

The scale and pace of change is placing considerable pressure on network capacity and the end-to-end connections process. This evolving landscape necessitates a more agile, scalable, and forward-looking approach to network design.

In response, our Design and Development teams are focused on:

**Data-Driven Forecasting:**
Enhancing load growth forecasts and scenario modelling to inform optimal design pathways.

**Powering the Next Generation of Connections:**
In 2024/25 we anticipate a significant uplift in large-scale demand and generation applications, driven by the electrification of transport, industrial decarbonisation, data-centre expansion, and the renewable energy assets. This growth places greater emphasis on proactive and strategic network design.

**Strategic Reinforcement planning:**
Design future-proofed connection solutions that consider long-term capacity growth and evolving system needs.

**Integrated whole system thinking:**
Working across transmission, distribution, and third-party networks to deliver holistic, coordinated connection solutions that maximise capacity, minimises delays and meets our customers' needs.

**Enhance early engagement:**
Early-stage feasibility studies, open portal, and capacity modelling to support informed decision- making for new applicants.

**Future-proofed Network Planning:**
Align short-term design with long-term infrastructure needs to ensure our networks are capable of supporting a decarbonised, electrified future.

## Customer-Centric Development:

### Putting the Users First

At the heart of SP Energy Networks approach is a deep commitment to customer-centric development. We are redesigning the customer experience across the major connections journey, ensuring that stakeholders are supported with clarity, speed and transparency.

Key initiatives include:

**Enhanced Early Engagement:**
At the design stage, we offer technical engagement, visibility of capacity constraints, and cleared pathways from the design outset.

**Improved Communication:**
Transparent milestones, accessible design options tailored to the specific needs of each project.

## Customer-Centric Development *continued*:

### Policy Alignment and Reform Readiness

We remain fully engaged with Ofgem's reforms to ensure that regulatory changes will shape the way connections are assessed, priced, and delivered.

We are actively contributing to industry working groups and stakeholder engagement forums, ensuring our processes are aligned with regulatory expectations and designed to deliver positive outcomes for all of our customers.

Our development approach supports key policy objectives, including:

- Faster and more efficient connections.
- Better coordination between transmission and distribution networks.
- A level playing field for all connection applicants.

### Preparing for What's Next

To support this transformation, we are also investing in strategic programmes such as:

**The Net Zero Grid Programme:**
Planning scalable grid architecture to support long-term decarbonisation which aims to prepare the electricity grid for the increased demand and changes associated with the transition to a Net Zero future.

**Whole System Collaboration:**
Working across system boundaries to deliver joined-up connections solutions.

**Major Reinforcement Projects:**
Designing and delivering infrastructure that can accommodate new clusters of high-capacity demand and generation.

**In Summary**
2024/25 will be a critical year for SP Energy Networks Design and Development function. As demand accelerates and customers' needs diversify, our role is to shape a smarter, faster, and more responsive connection process.

Through early engagement, proactive design, and alignment with Ofgem's reforms, we are not only responding to today's challenges – we are preparing our network and our customers for the energy system of tomorrow.

**Final Remarks**
At SP Energy Networks, we understand that major connection customers are not only key stakeholders-they are enablers of critical infrastructure, community development, and the decarbonised future of energy. The 2024/25 customer satisfaction results shoe encouraging progress and provide clear direction for continued improvement.

We are proud that our customers have recognised improvements in service quality, professionalism, and communications. However, we remain fully committed to acting on the constructive feedback received and ensuring our connections services are streamlined, transparent, and resilient.

This report is part of our ongoing commitment to regulatory accountability, customer insight, and operational excellence. We will continue to work closely with Ofgem, industry partners, and our wider stakeholder community to ensure that our approach to major connections continues to support economic growth, system flexibility, and achievement of the UK's Net Zero goals.

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**2024/25**

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