

SP Energy Networks

Major Connections Annual Report 2025/26



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I am pleased to introduce the third 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 we move beyond the midpoint of the RIIO-ED2 price control period and begin planning for RIIO-ED3, the role of electricity networks in delivering the UK’s energy ambitions has never been more important. The pace of the energy transition continues to accelerate, driven by increasing electrification, growing demand for network capacity, Clean Power 2030 objectives, and the UK’s commitment to achieving Net Zero. At SP Energy Networks, we recognise that our role extends beyond simply connecting customers to the network. We are helping to shape the infrastructure that will support a cleaner, more resilient and more sustainable energy system for generations to come.

Throughout 2025/26, we have continued to support customers across our SP Distribution and SP Manweb licence areas while adapting to significant industry change. As the only Distribution Network Operator serving customers across Scotland, England and Wales, we see first-hand the diverse challenges and opportunities facing local communities, developers, businesses and energy projects. Our focus remains on anticipating, planning for and managing the local, regional and national developments that influence our stakeholders and shape future energy requirements. This has become increasingly important as regional energy planning evolves and the transition towards Regional Energy Strategic Plans helps create a more coordinated and strategic approach to network investment.

One of the most significant developments during the year has been the continued implementation of Connections Reform. We have worked constructively with Ofgem, NESO and industry partners to ensure that reforms deliver a more efficient and sustainable connections process. In particular, we have supported the transition of distributed generation projects through the reform process, helping create a connections queue that better reflects project readiness and deliverability. This work is critical to ensuring available network capacity is allocated to schemes that can make the greatest contribution towards Net Zero and Clean Power 2030 ambitions.

Looking ahead, we welcome the next phase of Connections Reform within the demand sector and fully support the introduction of enhanced minimum information requirements for demand connections above 5MVA. These measures will help provide greater certainty regarding project maturity and future network requirements, enabling more effective planning and investment decisions across the energy system. Ultimately, this will support the efficient delivery of the infrastructure needed to meet future demand and accelerate progress towards a decarbonised economy.

Alongside these reforms, the benefits of the Access Significant Code Review continue to be realised across our network. During the year, we have seen increasing volumes of enabling works being progressed through the revised framework, helping unlock network capacity and reduce barriers for customers seeking connections. These investments are supporting a more efficient connections marketplace and creating the network capability required to accommodate growing levels of renewable generation, storage, electrification and emerging low-carbon technologies.

At SP Energy Networks, our customers remain at the heart of everything we do. We continue to listen carefully to customer feedback and use these insights to improve our services, processes and interactions. Whether through enhanced digital tools, more transparent communications or continuous process improvements, our objective is to make the connections journey as straightforward and efficient as possible.

As we look towards the second half of ED2 and begin preparing for ED3, we remain focused on investing in the capabilities, infrastructure and partnerships required to support future growth. The decisions we make today will influence the success of the UK’s energy transition for decades to come.

Nicola Connelly
CEO, SP Energy Networks



Introduction

The UK’s transition to a Net Zero economy continues to accelerate throughout the 2025/26 regulatory year, driven by increasing electrification, Clean Power 2030 ambitions, and the growing need for network capacity across all sectors of the economy. At SP Energy Networks, we play a critical role in enabling this transformation by facilitating timely, efficient and future-ready connections to the electricity network for strategically important projects and emerging technologies. As we move beyond the midpoint of RIIO-ED2 and begin preparing for RIIO-ED3, the importance of electricity networks in supporting economic growth, energy security and decarbonisation has never been greater.

This Annual Major Connections Report presents our performance and progress throughout the 2025/26 regulatory year, highlighting how we continue to meet the evolving needs of major connection customers while adapting to a rapidly changing energy landscape. Demand for high-capacity connections continues to grow, fuelled by utility-scale renewable generation, battery storage, transport electrification, data centres and wider industrial decarbonisation projects. Alongside established developers, we are also seeing an increasing number of new entrants to the connections marketplace, bringing new opportunities, challenges and requirements as they navigate the connections process.

Our Commitment
As the connections landscape becomes increasingly diverse, we remain committed to supporting both experienced developers and organisations that are engaging with the connections process for the first time. Through enhanced guidance, early engagement, improved digital resources and dedicated customer support, we are helping customers better understand network requirements, project development considerations and the wider regulatory framework. This proactive approach enables customers to make informed decisions, improve project readiness and progress their schemes more efficiently through the connections journey.

Transition and Innovation
Throughout 2025/26, SP Energy Networks has continued to respond to significant industry change, including the ongoing implementation of Connections Reform and the evolving requirements associated with regional and national energy planning. We have worked closely with Ofgem, NESO and industry stakeholders to support the transition towards a more efficient and sustainable connections process, helping ensure network capacity is allocated to projects that demonstrate readiness and can make the greatest contribution towards Clean Power 2030 and Net Zero ambitions.

We have also observed a notable increase in both the volume and complexity of projects entering our portfolio. Increasingly, customer requirements involve multiple technologies, larger capacity demands, phased development programmes and more complex interactions with both local distribution and wider transmission networks. This trend is expected to continue as constraints emerge across the energy system and customers seek innovative solutions to secure the network capacity necessary to support future growth and decarbonisation objectives.



Purpose of This Report

This report provides:

- Key performance metrics including quotation timescales.
- A detailed summary of the major connections delivered in 2025/26.
- 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.

Major Connections Performance

In the 2025/26 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.

Alongside maintaining strong performance against Time to Quote standards, we have continued to enhance our engagement model to support an increasingly diverse customer base. The growth in new market participants, particularly within renewable generation, energy storage and electrification sectors, has highlighted the importance of providing clear information, accessible guidance and early-stage support. Our teams have worked closely with customers to improve understanding of the connections process, network limitations and project development requirements, helping them navigate an increasingly complex regulatory and technical environment.

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		2024/25	2025/26	Difference
Metered Demand HV and EHV	SLC15A	50	80	30
	SLC15	33	39	6
Metered Demand EHV and above	SLC15A	56	80	24
	SLC15	38	46	8
Unmetered Other	SLC15A	8	14	7
	SLC15	n/a	3	n/a
Unmetered Local Authority	SLC15A	8	13	5
	SLC15	n/a	n/a	n/a
Unmetered PFI	SLC15	n/a	n/a	n/a

SPD, REPUTATIONAL (non-contestable SLC15)				
MCTTQ		2024/25	2025/26	Difference
Metered Demand Connections LV	SLC15	9	7	-2
Metered Demand Connections HV	SLC15	15	15	0
Distributed Generation LV	SLC15	17	17	0
Distributed Generation HV and EHV	SLC15	37	32	-5

SPM, FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)				
MCTTQ		2024/25	2025/26	Difference
Metered Demand LV	SLC15A	14	13	-1
	SLC15	9	9	0
Metered Demand HV	SLC15A	22	20	-2
	SLC15	14	14	0
Metered Demand HV and EHV	SLC15A	56	36	-20
	SLC15	25	26	1
Metered Demand EHV and above	SLC15A	46	49	3
	SLC15	50	44	-6
Distributed Generation LV	SLC15A	21	27	6
	SLC15	n/a	10	n/a
Distributed Generation HV and EHV	SLC15A	49	40	-9
	SLC15	35	21	-14
Unmetered Other	SLC15A	7	9	2
	SLC15	12	n/a	n/a

SPM, REPUTATIONAL (non-contestable SLC15)				
MCTTQ		2024/25	2025/26	Difference
Unmetered Local Authority	SLC15	6	9.5	4
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		2024/25	2025/26	Difference
Metered Demand HV and EHV	SLC15A	n/a	n/a	n/a
	SLC15	n/a	671	n/a
Metered Demand EHV and above	SLC15A	202	n/a	n/a
	SLC15	n/a	n/a	n/a
Unmetered Other	SLC15A	67	85	18
	SLC15	n/a	n/a	n/a
Unmetered Local Authority	SLC15A	34	34	-0
	SLC15	n/a	n/a	n/a
Unmetered PFI	SLC15	n/a	n/a	n/a

SPD, REPUTATIONAL (non-contestable SLC15)				
MCTTC		2024/25	2025/26	Difference
Metered Demand LV	SLC15	180	150	-30
Metered DemandHV	SLC15	467	443	-24
Distributed Generation LV	SLC15	195	226	31
Distributed Generation HV and EHV	SLC15	402	367	-35

SPM, FINANCIAL (contestable and non-contestable – SLC15 and SLC15A)				
MCTTC		2024/25	2025/26	Difference
Metered Demand LV	SLC15A	124	114	-10
	SLC15	176	136	-40
Metered Demand HV	SLC15A	223	245	22
	SLC15	375	337	-38
Metered Demand HV and EHV	SLC15A	n/a	286	n/a
	SLC15	n/a	n/a	n/a
Metered Demand EHV and above	SLC15A	528	583	55
	SLC15	n/a	n/a	n/a
Distributed Generation LV	SLC15A	118	163	45
	SLC15	n/a	49	n/a
Distributed Generation HV and EHV	SLC15A	463	260	-203
	SLC15	293	563	270
Unmetered Other	SLC15A	67	57	-10
	SLC15	n/a	n/a	n/a

SPM, REPUTATIONAL (non-contestable SLC15)				
MCTTC		2024/25	2025/26	Difference
Unmetered Local Authority	SLC15	n/a	185	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.

As customer requirements continue to evolve, our engagement activities have increasingly focused on supporting organisations that are less familiar with the connections process. We recognise that many customers entering the marketplace are developing projects in response to the opportunities created by the transition to a low-carbon economy. Through targeted engagement, educational materials, enhanced digital content and regular stakeholder events, we continue to build customer understanding and confidence throughout the connections journey. This approach supports better customer outcomes while helping improve the overall quality and readiness of applications entering the process.

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.

The survey continues to capture 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	37	9.49	367	8.66	404	8.74
Connections quotation	22	9.18	346	8.61	368	8.65
Distributed Generation LV			139	8.63	139	8.63
Distributed Generation HV and above			8	8.75	8	8.75
Metered Demand LV			110	8.92	110	8.92
Metered Demand HV			89	8.19	89	8.19
Metered Demand HV & EHV	3	8.00			3	8.00
Metered Demand EHV and above	2	9.00			2	9.00
Unmetered Other	17	9.41			17	9.41
Connections completed	15	9.93	21	9.48	36	9.67
Distributed Generation HV and above			3	9.00	3	9.00
Metered Demand LV			13	9.54	13	9.54
Metered Demand HV			5	9.60	5	9.60
Unmetered Other	15	9.93			15	9.93

SP Manweb	247	8.76			247	8.76
Connections Quotation	220	8.75			220	8.75
Distributed Generation LV	88	8.78			88	8.78
Distributed Generation HV and above	6	7.67			6	7.67
Metered Demand LV	53	8.62			53	8.62
Metered Demand HV	65	8.97			65	8.97
Metered Demand HV & EHV	1	6.00			1	6.00
Metered Demand EHV and above	2	9.50			2	9.50
Unmetered Other	5	8			5	8
Connections completed	27	8.89			27	8.89
Metered Demand LV	15	8.80			15	8.80
Metered Demand HV	12	9.00			12	9.00

Response Rate and Methodology

Response Rate

The survey achieved a response rate of 9% in 2025/26, a decrease from the 2024/25 figure of 14.3%.



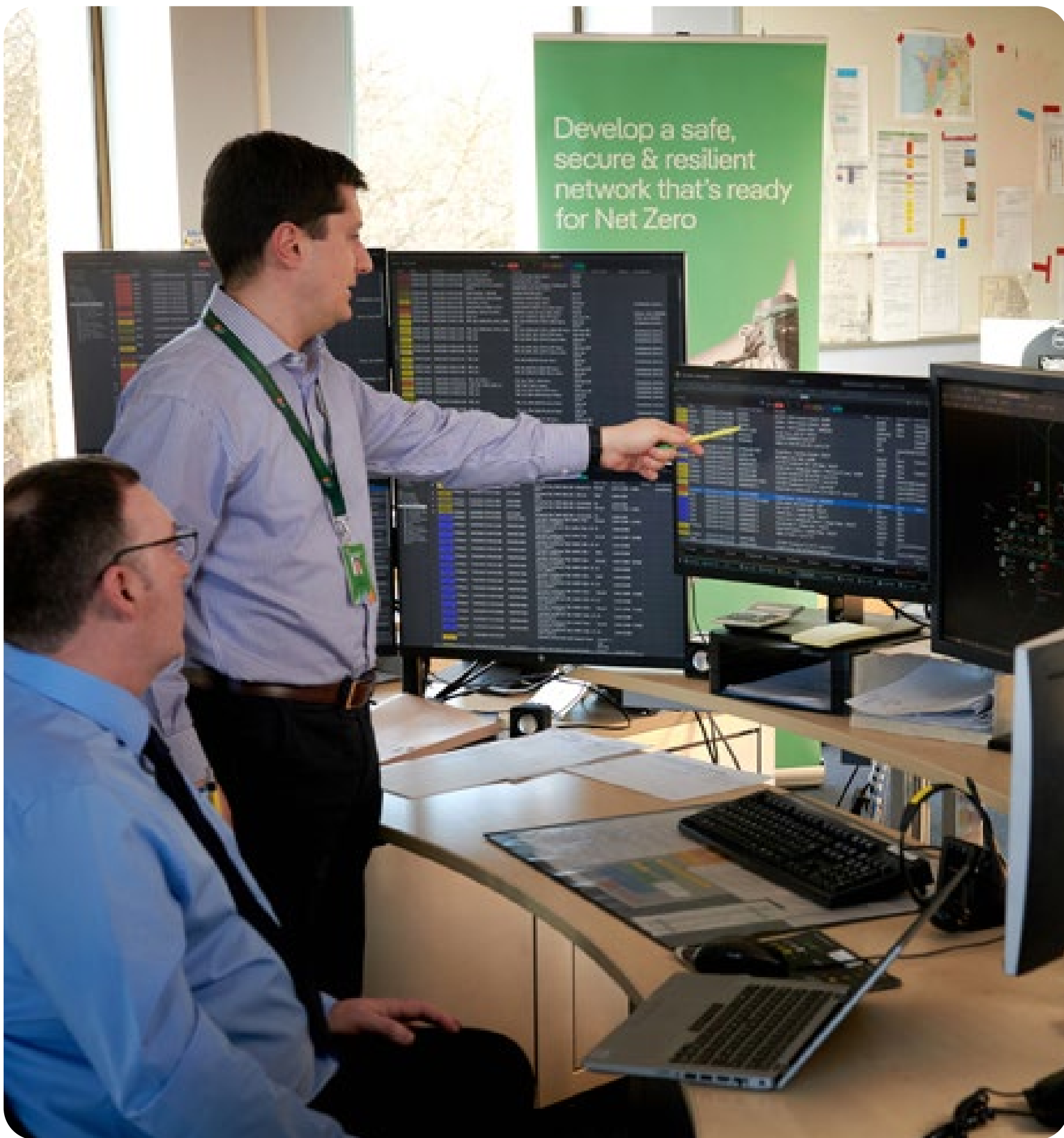
Overall satisfaction

Positive areas from Customer feedback:

- Communication standards and Professionalism.
- Technical Guidance.

Constructive Feedback:

- Initial information at early stages of process could be improved – We are continuing to review and update our online guidance, leaflets, and other customer information to ensure it is more intuitive, accessible, and easier for customers to understand.
- Timescale challenges particularly in the Distributed Generation LV market segment where applications falling outside of “Fast Track” provide a longer than anticipated response than customers expect – We are identifying efficiencies and opportunities in our internal processes and technical standards to reduce timelines and accommodate more connections within the “Fast Track” process.



Future Outlook

SP Energy Networks is well positioned to play a critical role in delivering the infrastructure required to support Clean Power 2030 and the UK’s longer-term Net Zero ambitions. Demand for major connections continues to increase across both licence areas, driven by renewable generation, energy storage, transport electrification, industrial decarbonisation and wider economic growth.

We expect the scale and complexity of our portfolio to continue growing over the coming years. Capacity challenges across both local distribution networks and the wider electricity system are driving the need for increasingly sophisticated network solutions, greater coordination between stakeholders and more strategic investment planning. In response, we will continue investing in digital capabilities, engineering expertise, customer engagement and network development to support customers effectively while maintaining efficient and transparent connections processes.

The continuing implementation of Connections Reform, combined with evolving regional energy planning arrangements, will play a key role in ensuring network capacity is directed towards projects that can deliver the greatest value to customers, communities and the wider energy transition. Through collaboration with Ofgem, NESO and industry partners, we will continue helping create a more efficient, resilient and future-ready connections marketplace.

Rising Demand Requires Strategic Network Design
The pace of electrification and growth in connection applications is placing increasing pressure on network capacity and the end-to-end connections process. As the energy landscape continues to evolve, it is essential that we adopt a more agile, scalable, and forward-looking approach to network planning and design.

To support this transition, our Design and Development teams are focused on:

- Data-driven forecasting and network planning.
- Strategic reinforcement planning.
- Integrated whole-system thinking.
- Future-proofing network capacity and resilience.
- Enabling the next generation of electricity connections.



Customer-Centric Development:

Putting Customers at the Centre of Change

At SP Energy Networks, customer needs remain at the heart of everything we do. We are redesigning the connections journey to create a simpler, more transparent experience that provides greater clarity, responsiveness, and support from initial enquiry through to energisation.

Key initiatives include:

- Enhanced early-stage engagement and guidance.
- Improved communications throughout the connections journey.
- More accessible and customer-focused information and resources.
- Ongoing improvements to digital services and customer interactions.



Policy Alignment and Reform Readiness

We remain actively engaged in Ofgem's ongoing connections reforms and wider industry developments that will shape how future connections are assessed, prioritised, and delivered.

Through participation in industry working groups and stakeholder forums, we are ensuring that our processes align with emerging regulatory requirements while continuing to deliver positive outcomes for our customers.

Our approach supports key policy objectives, including:

- Faster and more efficient connections.
- Improved coordination between transmission and distribution networks.
- Greater transparency and fairness for all connection applicants.

Preparing for the Future

To support the transformation of the energy system and meet growing customer demand, we continue to invest in a range of strategic programmes and initiatives, including:

- Major network reinforcement projects.
- Whole System Collaboration initiatives.

Together, these investments will help create a more flexible, resilient, and future-ready network capable of supporting the transition to a low-carbon economy.

In Summary

2025/26 represents an important year for SP Energy Networks' Design and Development function. As customer demand continues to grow, project portfolios become more complex, and the connections landscape evolves, our focus remains on delivering a smarter, faster and more responsive service. Through early engagement, proactive design, targeted customer support and alignment with industry reforms, we are helping customers successfully navigate the changing energy landscape while preparing both the network and our stakeholders for the energy system of the future.



Final Remarks

At SP Energy Networks, we recognise that major connection customers are central to delivering the infrastructure required for economic growth, community development and the UK's transition to Net Zero. As we support an increasing number of customers entering the marketplace and manage a growing portfolio of complex projects, we remain committed to providing the expertise, guidance and service excellence required to help customers succeed. Through continued collaboration, innovation and investment, we will support the development of the electricity network needed to deliver Clean Power 2030 and a just transition towards Net Zero.

