Draft Forecast of TNUoS Tariffs for 2025/26 – Webinar

NESO Revenue Team

December 2024

Click here to view the webinar recording

Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Agenda

1. Introduction
2. Tariff timetable
3. TNUoS Tariffs Uncertainties
4. Key inputs & findings
5. Revenue
6. Generation tariffs
7. Local Tariffs
8. Demand tariffs
9. Next Steps
10. Q&A

Tariff Forecasting & Setting Team

Nick Everitt

Forecasting and setting TNUoS to recover around £5bn of revenue per year from generators and demand; in addition to BSUoS Forecasting and tariff setting and AAHEDC tariff setting.

Sarah Chleboun

- Overall TNUoS tariff setting
- Offshore revenue & local tariffs
- Local substation
- Networks /Generation
- ALFs
- Onshore Local Circuits

Vacancy

- *Currently Recruiting*

Alan Fradley

- Networks /Generation
- Onshore Local Circuits

Dan Hickman

- Change Lead
- TDR
- Demand
- EET
- ALFs

Nicky White

- Change
- TDR
- Offshore revenue

Katie Clark

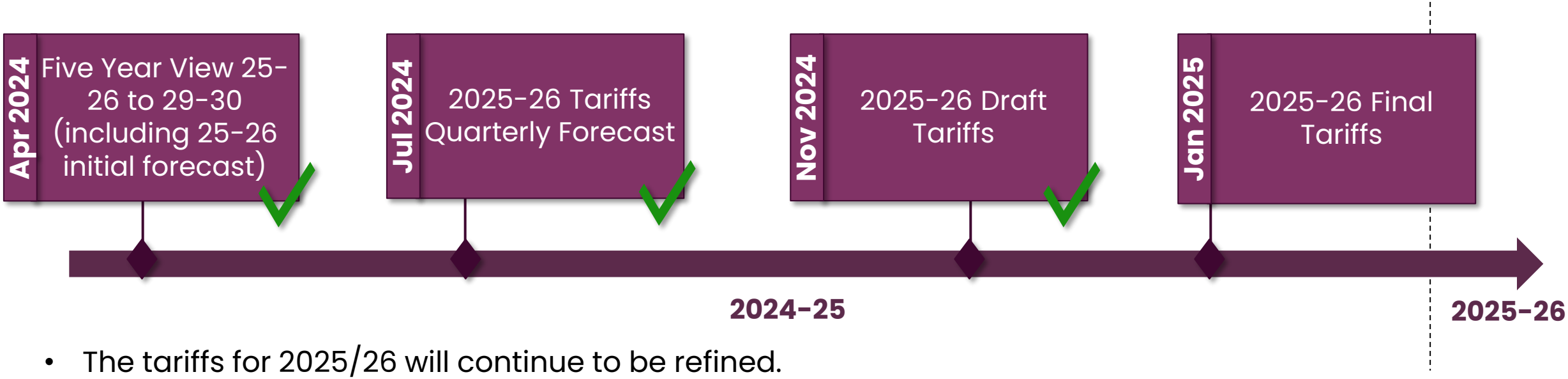
- Revenue
- Demand Charging Base
- Networks /Generation
- BSUoS Forecasting
- BSUoS Tariff Setting

Al-Marwah Az-zahra

- Revenue
- Demand Charging Base
- BSUoS Forecasting
- BSUoS Tariff Setting

Tariff Timetable

NESO has a licence and CUSC obligation to publish quarterly TNUoS forecasts and a 5-year review annually, to enable market participants to make efficient operational and investment decisions.



- The tariffs for 2025/26 will continue to be refined.
- Final Tariffs for 2025/26 will be published by 31st January 2025 and will take effect from 1st April 2025.

TNUoS Forecast Changes & Uncertainties

This slide contains details of any regulatory changes or uncertainties which we have taken into account in the setting of tariffs for 2025/26.

Regulatory Uncertainties

- There are currently no regulatory uncertainties to note for 2025/26.
- Substantial change is expected to charging methodology with the TNUoS Taskforce and REMA. These are not taken into account in this forecast, we have assumed the continuation of the current methodology until the outcomes of any required CUSC modifications are known.

Transport model input Uncertainties

- The final set of Nodal demand data was not available in time to be included within this publication and so will be further refined ahead of the Final Tariff publication in January.

CUSC Modifications

- CMP424 has been approved for implementation in Apr 2025 and has been incorporated in this forecast. It makes amendments to the scaling factors used in the Year Round TNUoS tariffs.
- CMP430 has been approved for implementation in Apr 2025. It has no impact on the calculation of tariffs.
- Please see our website for details of in-flight modifications: https://www.nationalgrideso.com/industry-information/codes/connection-and-use-system-code-cusc/cusc-modifications

NESO
National Energy System Operator

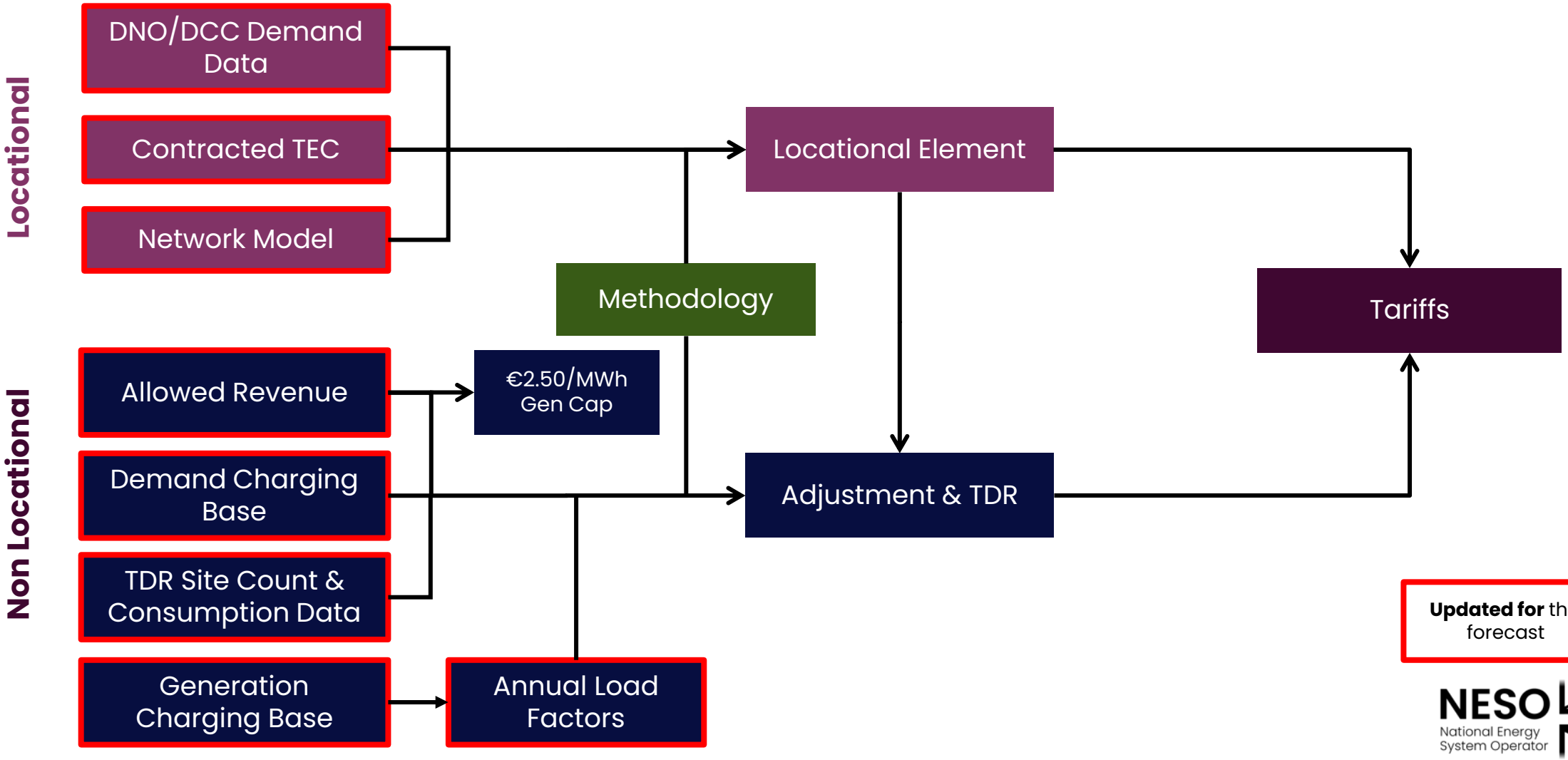
Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Key inputs and findings

Sarah Chleboun

Key Inputs for TNUoS Tariffs



Updated for this forecast

NESO National Energy System Operator

Input changes in this tariff publication

		April 2024	July 2024	Draft Tariffs November 2024	Final Tariffs January 2025
Methodology		**Open to industry governance**			
Locational	DNO/DCC Demand Data	Initial update using previous year's data source		Week 24 updated	Week 24 finalised
	Contracted TEC	Latest TEC Register	Latest TEC Register	TEC Register Frozen at 31 October	
	Network Model	Initial update using previous year's data source (except local circuit changes which are updated quarterly)		Latest version based on ETYS	
	Inflation	Forecast	Forecast	Forecast	Actual
Non-locational	OFTO Revenue (part of allowed revenue)	Forecast	Forecast	Forecast	NESO best view
	Allowed Revenue (non OFTO changes)	Initial update using previous year's data source	Update financial parameters	Latest TO forecasts	From TOs
	Demand Charging Bases (incl. TDR Site Count)	Initial update using previous year's data source	Revised forecast	Revised forecast	Revised by exception
	Generation Charging Base	NESO best view	NESO best view	NESO best view	NESO final best view
	Generation ALFs	Previous year's data source		Draft ALFs published	Final ALFs published
	Generation Revenue (G/D split)	Forecast	Forecast	Forecast	Generation revenue £m fixed
	TDR Consumption Data	Initial update using previous year's DN data		DN data updated	Revised by exception

Key findings

Total Revenue

- The total TNUoS revenue is forecast at £5.5bn for 2025/26, (an increase of £234.85m from the July forecast). This increase is mainly due to revisions to Onshore TO Revenue (£248.1m) and increases to other pass-through items (£0.9m), offset by revisions to OFTO revenue and forecast OFTO Asset Transfer Dates (-£14.2).

Generation

- Generation revenue is forecast to be £1.16bn for 2025/26, a decrease of £15.1m since the July forecast, mainly driven by a decrease in offshore generation local charges.
- The generation charging base for 2025/26 has been forecast as 94.8GW based on our best view, a decrease of 4.5GW since the July forecast.
- The average generation tariff for 2025/26 is forecast at £12.27/kW, an increase of £0.40/kW since the July forecast, due to the decrease in charging base.

Demand

- Revenue to be collected through demand is forecast at £4.34bn for 2025/26, a £250m increase since the July tariffs. The increase in demand revenue is the result of the increase in total revenue to be collected and an increase in the demand locational revenue of £18.6m.

Consumer Bill

- The impact on the end consumer is forecast to be £56.28 for 2025/26 (6.4% of the average annual electricity consumer bill), an increase of £4.35 from the July forecast. This is due to the increase in the average NHH tariff and domestic TDR tariff since the July forecast.

Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Revenue

Marwah Az-zahra

TO Revenue

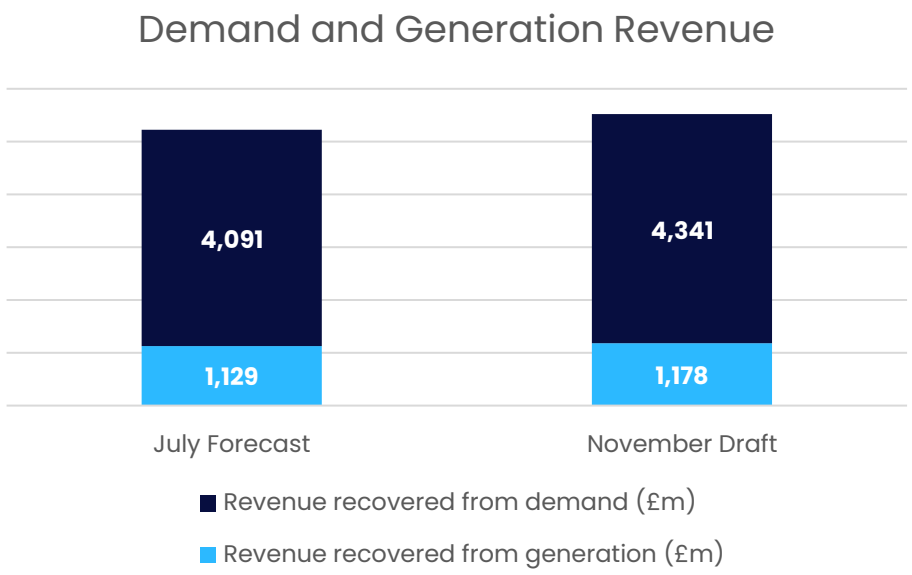
£m Nominal	2025/26 TNUoS Revenue			
	Initial Forecast	July Forecast	November Draft	January Final
TO Income from TNUoS				
National Grid Electricity Transmission	2,502.8	2,502.8	2,595.3	-
Scottish Power Transmission	502.9	502.9	530.5	-
SHE Transmission	1,197.3	1,197.3	1,325.4	-
Total TO Income from TNUoS	**4,202.9**	**4,202.9**	**4,451.1**	**-**
Other Income from TNUoS				
Other Pass-through from TNUoS	131.5	82.8	83.8	-
Offshore (plus interconnector contribution / allowance)	946.3	982.7	968.5	-
Total Other Income from TNUoS	**1,077.8**	**1,065.6**	**1,052.3**	**-**
Total to Collect from TNUoS	**5,280.8**	**5,268.5**	**5,503.4**	**-**

- The total TNUoS revenue is forecast at £5.5bn for 2025/26, (an increase of £234.85m from the July forecast). This increase is mainly due to revisions to Onshore TO Revenue (£248.1m) and increases to other pass-through items (£0.9m), offset by revisions to OFTO revenue and forecast OFTO Asset Transfer Dates (-£14.2).
- The above figures remain highly indicative with the next onshore and offshore TO forecasts expected in the January final forecast.

Summary of revenue to be recovered

Revenue	2025/26 Tariffs			
	Initial Forecast	July Forecast	November Draft	January Final
Total Revenue (£m)	5,280.8	5,268.5	5,503.4	
Generation Output (TWh)	209.1	215.3	215.3	
% of revenue from generation	21.38%	22.36%	21.13%	
% of revenue from demand	78.62%	77.64%	78.87%	
Revenue recovered from generation (£m)	1,129.1	1,177.9	1,162.8	
Revenue recovered from demand (£m)	4,151.7	4,090.6	4,340.6	

- The generation output is set to remain the same.
- Revenue recovered by demand is set to increase by £250m compared to July forecast. A £15.1m decrease is seen by revenue recovered by generation.



Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Generation Tariffs

Sarah Chleboun

NESO
National Energy System Operator

Contracted, Modelled & Chargeable Generation Capacity

- The generation charging base for 2025/26 is forecast at 94.75GW
- This is a decrease of 4.47GW since the July forecast
- Contracted TEC has reduced by 1.05GW since the July forecast
- The forecast is based on the TEC registers as of 31st October and the contracted TEC will not be updated for the Final tariffs
- Our best view and chargeable TEC will be updated ahead of the Final tariffs.

	2025/26 Tariffs	
Generation (GW)	July	Draft
Contracted TEC	113.33	112.27
Modelled Best View TEC	108.04	*For input to locational tariffs post 31st October please see Contracted TEC*
Chargeable TEC	99.22	94.75

- CONTRACTED:
  - Full TEC register used
- MODELLED:
  - Reduction in TEC in line with internal best view.
- CHARGEABLE:
  - Modelled TEC minus interconnector capacity

NESO National Energy System Operator

Generation Tariffs

- The Limiting Regulation requires the total TNUoS recovery from generators to be within the range of €0-2.50/MWh on average.
- All local onshore and local offshore tariffs are excluded in the Limiting Regulation €2.50/MWh cap for generator transmission charges, except for TNUoS local charges associated with pre-existing assets.
- The adjustment tariff was introduced to ensure compliance with the €2.50/MWh cap. It is forecast to increase by £0.16/kW, to become less negative.

Generation Tariffs (£/kW)	2025/26 July	2025/26 November	Change since last forecast
Adjustment	- 1.720165	- 1.558845	0.161320
Average Generation Tariff*	11.871725	12.272536	0.400812

The average generation tariff is calculated by dividing the total revenue payable by generation over the generation charging base in GW. It includes local charges

- The average generation tariff is forecast to be £12.27/kW for 2025/26, an increase of £0.40/kW since the July forecast due to the decrease in charging base.

Generation TNUoS Tariffs – Wider tariffs

The generation TNUoS wider tariffs are made of the four elements below:

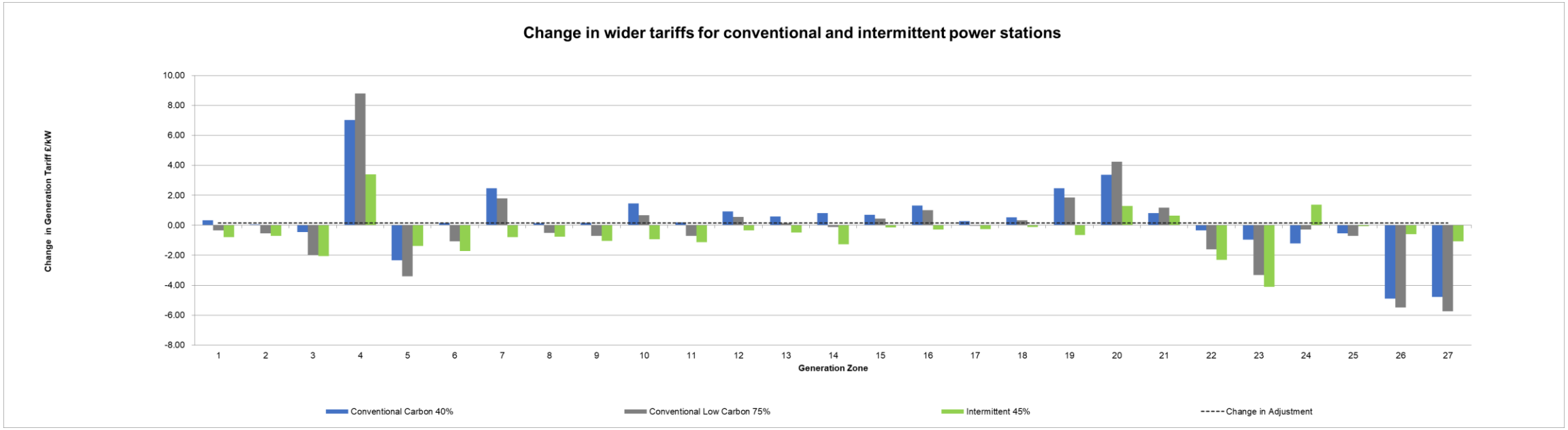
Peak Security | **Year Round Shared** | **Year Round Not Shared** | **Generator** Adjustment

Year Round Shared and Year Round Not Shared elements are multiplied by Annual Load Factors (ALFs) dependent on generation type

We publish examples for each generation type calculation using example ALFs:

Conventional Carbon 40%	Conventional Low Carbon 75%	Intermittent 45%
Biomass	Nuclear	Offshore wind
CCGT/CHP	Hydro	Onshore wind
Coal		Solar PV
OCGT/Oil		Tidal
Pumped storage		
Battery storage		
Reactive Compensation		

Generation Tariffs



- Changes in the locational tariffs are mainly due to our revisions to the contractual TEC and nodal demand and the network model.
- The change in flows has resulted in an increase in zone 4, which is often sensitive to small changes.
- Delays to expected projects have caused a significant reduction in Conventional Tariffs in zones 26 and 27

NESO
National Energy System Operator

Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Local Tariffs

Alan Fradley/Nicky White

Onshore Local Substation Tariffs

- Onshore local substation tariffs are inflated annually, in line with the increase in May-Oct CPIH
- The local substation tariffs for 2025/26 have been “locked down” and will remain unchanged in the final tariffs in January
- Increased by 0.1% since July’s forecast, due to marginally higher inflation than forecast.

Final local substation tariffs for 2025/26

2025/26 Local Substation Tariff (£/kW)				
Substation Rating	Connection Type	132kV	275kV	400kV
<1320 MW	No redundancy	0.179523	0.089766	0.061916
<1320 MW	Redundancy	0.378275	0.192132	0.136425
≥1320 MW	No redundancy	-	0.263729	0.187768
≥1320 MW	Redundancy	-	0.396867	0.285445

Onshore Local Circuits Tariffs

- Local circuits models for 2025/26 have been updated, in line with the refreshed ETYS network data.
- We list the local circuit tariffs for non-MITS sites that are forecast to have directly-connected generators in the specific charging year.
- Tariffs can be positive or negative, depending on the "incremental" impact on the local networks.
- The tariffs for Arecleoch Extension and Strathy Wood have been removed since the July Forecast as they no longer have contracted TEC within 2025/26.

Substation Name	(£/kW)	Substation Name	(£/kW)	Substation Name	(£/kW)
Aberarder	1.711931	Douglas North	0.760858	Langage	-0.400734
Aberdeen Bay	3.347776	Dunhill	1.791917	Limekilns	2.411223
Achruach	-1.635918	Dunlaw Extension	0.528806	Lochay	0.380429
Aigas	0.879048	Dunmaglass	1.087393	Luichart	0.705603
An Suidhe	-1.051223	Edinbane	8.562243	Marchwood	-0.295126
Arecleoch	3.005452	Enoch Hill	0.760858	Mark Hill	1.103307
Ayrshire Grid Collector	0.169065	Ewe Hill	1.741520	Middle Muir	2.640178
Beinneun Wind Farm	1.687371	Fallago	-0.080082	Middleton	0.176522
Benbrack	0.910916	Farr	4.349028	Millennium Wind	1.994254
Bhlaraidh Wind Farm	0.761915	Faw Side	10.149596	Mossford	1.985636
Black Hill	1.919911	Fernoch	5.359768	Nant	-1.554983
Black Law	2.092360	Ffestiniogg	0.271855	Necton	0.955914
BlackCraig Wind Farm	6.924933	Fife Grid Services	0.189806	Rhigos	0.132023

For full details of this table see Table 5 in the report / published tables file

Offshore Local Tariffs

- Tariffs are set at asset transfer, or the beginning of a price control, and are indexed in line with the OFTO licence.
- Most Offshore local tariffs have decreased slightly in line with the revenue of the associated OFTO.
- Projects expected to asset transfer during 2024/25 onwards will have tariffs calculated once asset transfer has taken place.

Offshore Generator	2025/26 November Tariff Component (£/kW)		
	Substation	Circuit	ETUoS
Barrow	11.649990	61.546296	1.528279
Beatrice	9.389647	25.744817	-
Burbo Bank Extension	14.584257	28.186900	-
Dudgeon	21.331780	33.469891	-
East Anglia 1	12.627454	53.291208	-
Galloper	21.835962	34.535819	-
Greater Gabbard	21.706351	50.230679	-
Gunfleet	25.352854	23.379880	4.369834
Gwynt y mor	27.387460	27.077491	-
Hornsea 1A	9.747932	34.489707	-
Hornsea 1B	9.747932	34.489707	-
Hornsea 1C	9.747932	34.489707	-
Hornsea 2A	11.047354	37.319614	-
Hornsea 2B	11.047354	37.319614	-
Hornsea 2C	11.047354	37.319614	-
Humber Gateway	16.117673	36.979486	-
Lincs	22.375180	87.993930	-
London Array	15.184275	52.061059	-
Moray East	11.318789	28.352051	-
Ormonde	35.818661	66.952842	0.533558
Race Bank	12.917939	35.879051	-
Rampion	10.552712	27.605447	-
Robin Rigg	-0.7861740	44.624878	14.297527
Robin Rigg West	-0.7861740	44.624878	14.297527
Sheringham Shoal	33.511140	39.467980	0.857918
Thanet	25.589966	47.942859	1.154154
Triton Knoll	10.636370	31.688721	-
Walney 1	30.936498	61.849924	-
Walney 2	28.781873	58.573980	-
Walney 3	13.269379	26.882966	-
Walney 4	13.269379	26.882966	-
West of Duddon Sands	11.867124	59.156062	-
Westermost Rough	24.129810	41.065869	-

Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Demand Tariffs

Dan Hickman

Demand Tariffs

- The average demand residual tariff has increased broadly in line with increases in allowed revenue.
- Since the July publication, both the average HH & NHH demand tariffs have increased. The main driver being changes to the forecast generation and demand by node.
- The average HH gross tariff is forecasted to be at £7.81/kW, an increase of £1.17/kW compared to July. The average NHH tariff is forecast at 0.38p/kWh, a increase of 0.07p/kWh.

Non-locational Banded Tariffs	2025/26 July	2025/26 November	Change
Average (£/site/annum)	123.115360	131.615496	8.500135
Unmetered (p/kWh/annum)	1.559189	1.730788	0.171598
Demand Residual (£m)	3,992.7	4,224.1	231.4

HH Tariffs (Locational)	2025/26 July	2025/26 November	Change
Average Tariff (£/kW)	6.636305	7.806603	1.170299

EET	2025/26 July	2025/26 November	Change
Average Tariff (£/kW)	2.706248	3.106969	0.400721
AGIC (£/kW)	2.789141	2.791637	0.002496
Embedded Export Volume (GW)	7.484425	7.810774	0.326350
Total Credit (£m)	20.254709	24.267834	4.013125

NHH Tariffs (locational)	2025/26 July	2025/26 November	Change
Average (p/kWh)	0.304276	0.378015	0.073739

NESO National Energy System Operator

TDR Banded Charges

- Changes in demand residual banded tariffs are impacted by;
  - Changes in overall demand revenue
  - Changes in demand Proportion used to allocate revenue to each charging band provided by DNOs
  - Forecast site counts per band changing in line with latest actual site counts being billed
- On average, Transmission Demand Residual tariffs have increased by ~6%, in line with the increase in the demand residual revenue.
- For the first time a full GB wide set of actual consumption data has been made available to NESO to determine the proportion of revenue to be recovered from each band

Band		2025/26 July	2025/26 November	Change
Domestic	Tariff - £/Site/Day	0.135823	0.148704	0.012881
LV_NoMIC_1		0.091560	0.170491	0.078931
LV_NoMIC_2		0.332169	0.403074	0.070905
LV_NoMIC_3		0.767145	0.844912	0.077767
LV_NoMIC_4		2.283947	2.300924	0.016977
LV1		4.105523	4.302998	0.197475
LV2		6.983995	7.189576	0.205581
LV3		11.134944	11.288913	0.153969
LV4		25.965876	25.039789	(0.926087)
HV1		21.586225	24.038633	2.452408
HV2		65.139082	69.152197	4.013115
HV3		124.998029	134.115745	9.117716
HV4		319.604356	352.092870	32.488514
EHV1		174.276812	177.027409	2.750597
EHV2		877.000450	816.822572	(60.177878)
EHV3		1,647.447367	1,772.543779	125.096412
EHV4		4,617.682978	4,172.367764	(445.315214)
T-Demand1		632.567787	713.327257	80.759470
T-Demand2		2,125.129762	2,519.052656	393.922894
T-Demand3		5,589.944623	5,997.314639	407.370016
T-Demand4		13,376.044359	14,091.179805	715.135446

Unmetered demand		p/kWh	p/kWh	
Unmetered		1.559189	1.730788	0.171598

NESO National Energy System Operator

TDR Banded Charges

	Band	Percentile	Threshold (kWh/MWh or kVA)		Consumption (GWh)	Consumption Proportion %	Site Count
			Lower	Upper			
	Domestic				93,047	38.1%	29,670,891
kWh	LVN1	≤ 40%	-	≤ 3,571	3,119	1.3%	867,477
	LVN2	40 - 70%	> 3,571	≤ 12,553	5,504	2.3%	647,465
	LVN3	70 - 85%	> 12,553	≤ 25,279	5,974	2.4%	335,260
	LVN4	> 85%	> 25,279	∞	16,475	6.8%	339,532
kVA	LV1	≤ 40%	-	≤ 80	7,159	2.9%	78,889
	LV2	40 - 70%	> 80	≤ 150	10,633	4.4%	70,132
	LV3	70 - 85%	> 150	≤ 231	6,647	2.7%	27,921
	LV4	> 85%	> 231	∞	17,798	7.3%	33,704
	HV1	≤ 40%	-	≤ 422	3,942	1.6%	7,776
	HV2	40 - 70%	> 422	≤ 1,000	11,038	4.5%	7,569
	HV3	70 - 85%	> 1,000	≤ 1,800	8,789	3.6%	3,107
	HV4	> 85%	> 1,800	∞	25,152	10.3%	3,387
	EHV1	≤ 40%	-	≤ 5,000	1,683	0.7%	451
	EHV2	40 - 70%	> 5,000	≤ 12,000	4,543	1.9%	264
	EHV3	70 - 85%	> 12,000	≤ 21,500	4,719	1.9%	126
	EHV4	> 85%	> 21,500	∞	10,748	4.4%	122
MWh	T-Demand1	≤ 40%	-	≤ 33,548	481	0.2%	32
	T-Demand2	40 - 70%	> 33,548	≤ 73,936	956	0.4%	18
	T-Demand3	70 - 93%	> 73,936	≤ 189,873	1,897	0.8%	15
	T-Demand4	> 93%	> 189,873	∞	1,486	0.6%	5
Unmetered demand							
	Unmetered				2,267	0.9%	

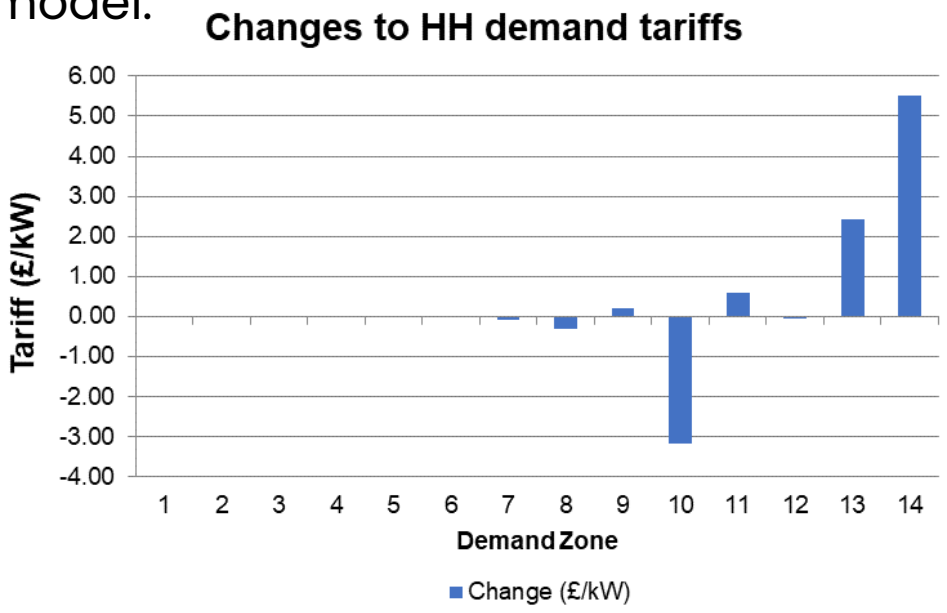
- For the first time a full GB wide set of actual consumption data has been made available to NESO to determine the proportion of revenue to be recovered from each band which has driven some significant changes most notably an increase of 86% to the LV_NoMIC_1
- These consumption proportions are now fixed and won't change for final tariffs.
- Site counts for higher voltage bands EHV and Transmission will be reviewed before final if any new information becomes available.

NESO National Energy System Operator

HH Demand Tariffs

- In the current forecast 2025/26 the average locational HH tariffs is forecast at £7.81/kW, an increase of £ 1.17 /kW compared to the July forecast.
- As shown in the below table and graph, there are fluctuations in tariffs for zones 7 through to 13. These are due to changes in the zonal generation and demand forecasts which have adjusted flows within the transport model.

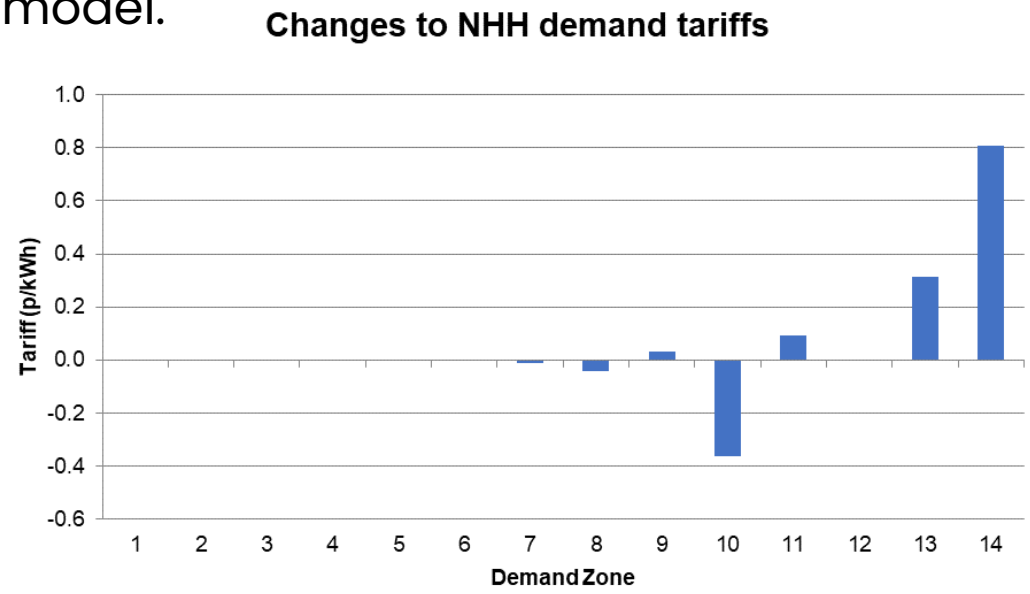
Zone	Zone Name	2025/26 July (£/kW)	2025/26 November (£/kW)	Change (£/kW)
1	Northern Scotland	-	-	-
2	Southern Scotland	-	-	-
3	Northern	-	-	-
4	North West	-	-	-
5	Yorkshire	-	-	-
6	N Wales & Mersey	-	-	-
7	East Midlands	0.076687	-	-0.0766870
8	Midlands	2.586633	2.263138	-0.3234950
9	Eastern	1.333956	1.542340	0.208384
10	South Wales	7.005880	3.819751	-3.1861290
11	South East	4.443943	5.036122	0.592179
12	London	7.556494	7.491102	-0.0653920
13	Southern	6.311561	8.729190	2.417629
14	South Western	4.060896	9.567700	5.506804



NHH Tariffs

- The average NHH tariff for 2025/26 is forecast to be 0.38p/kWh, an increase of 0.07p/kWh compared to the July forecast.
- As shown in the below table and graph, there are fluctuations in tariffs for zones 7 through to 13. These are due to changes in the zonal generation and demand forecasts which have adjusted flows within the transport model.

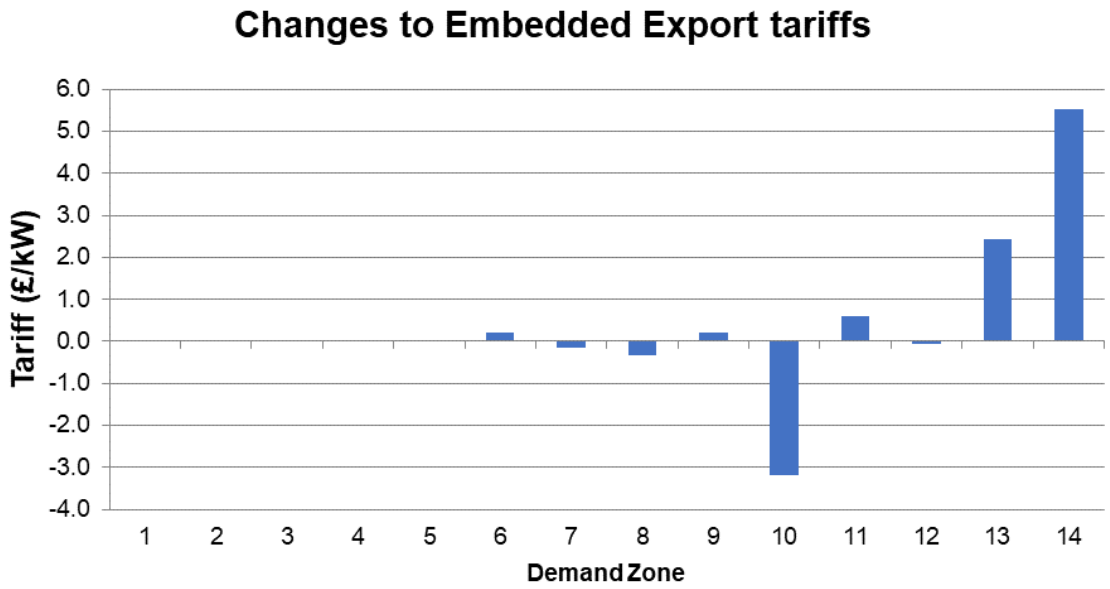
Zone	Zone Name	2025/26 July (p/kWh)	2025/26 November (p/kWh)	Change (p/kWh)
1	Northern Scotland	-	-	-
2	Southern Scotland	-	-	-
3	Northern	-	-	-
4	North West	-	-	-
5	Yorkshire	-	-	-
6	N Wales & Mersey	-	-	-
7	East Midlands	0.009870	-	-0.0098700
8	Midlands	0.333620	0.292904	-0.0407160
9	Eastern	0.180633	0.211744	0.031111
10	South Wales	0.822447	0.459966	-0.3624810
11	South East	0.605997	0.699604	0.093607
12	London	0.798303	0.797542	-0.0007610
13	Southern	0.815929	1.129760	0.313831
14	South Western	0.562408	1.368920	0.806512



Embedded Export

- In the current forecast of 2025/26 the average EET is forecast at £3.11/kW, which is an increase of £0.40/kW in comparison to the July forecast.
- As shown in the below table and graph, there are fluctuations in tariffs for zones 6 through to 13. Similar to HH Tariffs these are due to changes in the generation and demand backgrounds which have adjusted flows within the transport model.

Zone	Zone Name	2025/26 July (£/kW)	2025/26 November (£/kW)	Change (£/kW)
1	Northern Scotland	-	-	-
2	Southern Scotland	-	-	-
3	Northern	-	-	-
4	North West	-	-	-
5	Yorkshire	-	-	-
6	N Wales & Mersey	0.185399	0.389234	0.203835
7	East Midlands	2.865828	2.712561	-0.1532670
8	Midlands	5.375774	5.054775	-0.3209990
9	Eastern	4.123097	4.333977	0.210880
10	South Wales	9.795021	6.611388	-3.1836330
11	South East	7.233084	7.827759	0.594675
12	London	10.345635	10.282739	-0.0628960
13	Southern	9.100702	11.520827	2.420125
14	South Western	6.850037	12.359337	5.509300



Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Demand Forecasts

Dan Hickman

System Peak, HH/NHH demand & Chargeable Export Forecast

	2025/26 Tariffs			
Charging Bases	**Initial**	**July**	**Draft**	**Final**
Generation (GW)	83.15	99.22	94.75	
NHH Demand (4pm-7pm TWh)	23.06	23.29	22.87	
Gross charging				
Total Average Gross Triad (GW)	47.43	47.45	47.49	
HH Demand Average Gross Triad (GW)	17.21	17.70	17.95	
Embedded Generation Export (GW)	7.48	7.48	7.81	

- Overall system demand has broadly stayed the same. There is a 0.04 GW increase compared to the July forecast.
- Chargeable Export Volume forecast has increased by 4% to 7.81 GW.
- NHH forecast has decreased by 2 % to 22.87 TWh.
- HH demand forecast has increased by 1% to 17.95 GW.

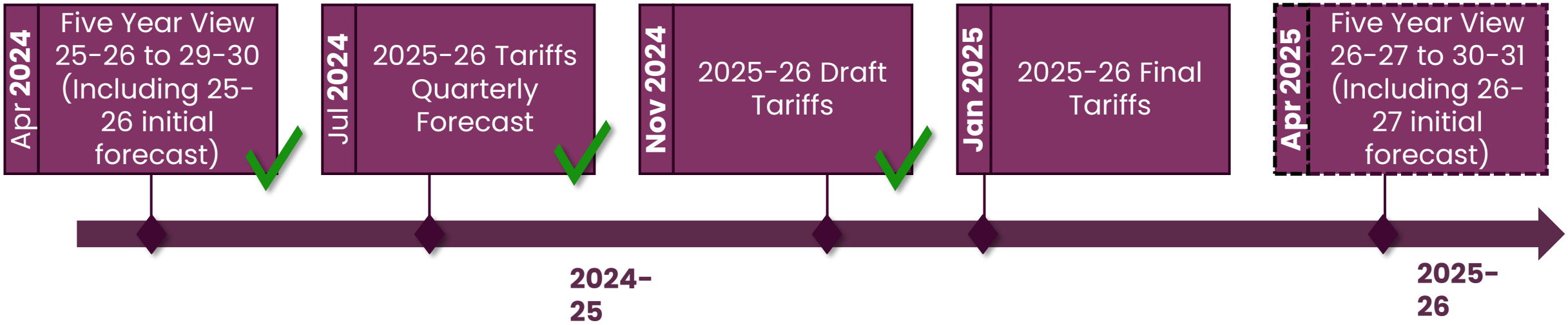
Questions?
Go to: www.slido.com
Event code: #TNUOS

Feedback?
Click here

Next Steps

Nick Everitt

Tariff Timetable



- The next publication will be the Final tariffs for 2025/26 which will be published in January 2024 and will apply from April 2025.
- The TNUoS forecast timetable for 2026/27 will be published end of January 2024.

Getting involved

Transmission Charging Methodology Forum (TCMF)

- We will continue to engage with you on our TNUoS forecast via the monthly TCMF meetings.
- Interested? Further details can be found on the NESO website

Charging Future Forum

- One place to learn, contribute and shape the reform of GB's electricity network access and charging arrangements
- Interested? Further information can be found on the Charging Futures Website or sign up to receive more information here.

Transport and Tariff Model Training

- We plan on running more Transport and Tariff Model training sessions, which will be scheduled soon.
- Please provide suggestions and register your interest via TNUoS.queries@nationalenergyso.com
- The recordings from the last training session can be found here.

If you're not already subscribed to our mailing list, you can subscribe here

Q&A

Go to: www.slido.com

Event code: #TNUOS

NESO
National Energy System Operator

Thank you

Please complete the feedback poll using the link:

TNUoS Tariffs Feedback Form

Please send any other feedback that you have via email to:

tnuos.queries@nationalenergyso.com

tnuos.queries@nationalenergyso.com

NESO
National Energy System Operator