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Dear Convener,

Thank you for the opportunity to provide evidence to the Committee on 15 September regarding data centres in Scotland.

During the session, I undertook to provide some further information to the Committee in writing, and I hope that the below points are helpful in providing some clarification and supplementary information.

Potential number of data centre connections in Scotland

As we discussed, analysis by NESO has previously identified that locating an additional 5GW of flexible demand behind transmission bottlenecks in Scotland could save consumers up to £5 billion¹. At present NESO is aware of 24 data centres seeking to connect at transmission level in Scotland with the demand capability of these projects totalling 8.568GW. For distribution-connected demand, NESO is aware of 4 data centres with a combined capacity of 0.296GW. This would represent a total of 28 data centres with a combined capacity of 8.864GW. These projects are at varying stages of development, with transmission connecting projects likely to see connection dates spread throughout the 2030s and are subject to revised offers being accepted by developers following connection reform.

Strategic Energy Planning

We also discussed the granularity of, and timelines for, NESO's strategic energy planning. Principally, the GB-wide Strategic Spatial Energy Plan (SSEP) and the Regional Energy Strategic Energy Plan (RESP) for Scotland. NESO is also responsible for the developing of an accompanying Centralised Strategic Network Plan (CSNP). The purpose of the CSNP will be to recommend what

¹ Beyond 2030 (2024 report, p44), <https://www.neso.energy/document/315516/download>



energy network infrastructure reinforcement may be needed for the long-term, bringing together future GB-wide electricity, gas, and hydrogen network planning.

The first SSEP, which was co-commissioned by the Scottish Government alongside the UK and Welsh governments, will for the first time strategically plan the future energy generation and storage requirements across every part of Great Britain.. Whilst it does not focus on individual specific projects, it will map potential zonal locations, quantities and types of electricity and hydrogen generation and storage. This will help accelerate and optimise the move to a more reliable, affordable and clean energy across GB. When the first draft SSEP is published for consultation in 2027, it will consist of 19 onshore and 19 offshore zones. For Scotland, there will be 4 onshore publication zones and 6 marine publication zones. As Committee members highlighted, this allows the SSEP to reflect system boundaries that exist within Scotland as part of the plan for GB as a whole.

The SSEP will recommend an optimal energy mix for GB from 2030 to 2050. NESO has worked closely with the co-commissioners of the Strategic Spatial Energy Plan – Scottish, UK and Welsh governments – and Ofgem, as well as the energy industry, environmental organisations and societal stakeholders to ensure the pathways are robust. In line with the SSEP commission, the Secretary of State for Energy Security and Net Zero will determine the pathway to be taken forward by the SSEP, with the Scottish Government and Welsh Government having a formal advisory role. To support ministerial decision making and as set out in the widely consulted methodology, NESO is providing confidential independent advice on pathway options, shared with each of the co-commissioners. Following determination by the Secretary of State, the draft SSEP will be published for public consultation in 2027, allowing the final version of the first SSEP delivered by the end of 2027.

As the first SSEP will provide the capacity for generation, storage and hydrogen these will in turn become inputs into the RESP process, to ensure that the RESP pathways developed are coherent. Scotland's RESP is designed to help ensure that local areas get the energy infrastructure they need to meet local decarbonisation and economic growth ambitions. However, in order to reflect alignment with the devolved settlement, rather than system boundaries, which are more critical for the SSEP, RESP will ultimately be presented as a single national plan for Scotland.

Over time, insights from RESP will inform future iterations of the SSEP, creating an iterative feedback loop between GB-wide and Scotland level planning. RESPs will primarily drive investment in distribution networks. It will be for network companies to set out their investment plans drawing upon RESP and the regulator, Ofgem, will have final approval of network investment plans. Earlier this year NESO undertook a consultation of the methodology for RESPs, and subject to approval by Ofgem, this will be published soon. The first RESPs will be published by the end of 2028, as will the CSNP. The SSEP, RESPs and the CSNP will then continue to be updated in three-year cycles.



If it would be helpful to further discuss or explain the development of either the SSEP or the RESP, or any other aspect of NESO's role in relation to strategic energy planning then I would also like to repeat the offer for NESO to brief the Committee on the design of the plans.

Yours sincerely

Matt Magill

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