

Guidance

(Draft) Onshore Competition Information Exchange Guidance Document

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This document sets out the process and guidance for information sharing between Transmission Owners, the Delivery Body, and bidders during an Onshore Transmission Tender Exercise.

This document is aimed at Transmission Owners (TOs) and the Delivery Body in an Onshore Transmission Tender Exercise and is an associated document to the TOs' electricity transmission licences, given effect through Special Condition 9.20 Tender Support Activities in onshore electricity transmission.

This document includes the following:

- Details of the information TOs are required to provide to the Delivery Body
- Process and timelines for making and responding to information requests from the Delivery Body
- Confidentiality arrangements
- Facilitation of bidder site visits

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1. Background

Context and related publications

- 1.1 The Onshore Transmission Tender Exercise refers to an early competition model where a competitive tender is used to determine a solution to a need on the network. This early competition is run before detailed design of the preferred solution has been carried out and encourages cost efficiencies and additional innovation in the design, delivery, and operation of transmission infrastructure which consumers will benefit from.
- 1.2 This document is intended to provide further information and guidance on the Transmission Owners' Tender Support Activities in onshore electricity transmission as well as the Delivery Body's role in requesting, processing, and sharing information.
- 1.3 This document is to be read in conjunction with Special Condition (SpC) 9.20 (Tender Support Activities in onshore electricity transmission) in each of the TOs' electricity transmission licences.
- 1.4 Capitalised terms in this document have the meanings given to them in the TO electricity transmission licences or as defined in the Electricity (Early-Model Competitive Tenders for Onshore Transmission Licences) Regulations 2024.

2. Introduction

Scope of the Onshore Competition Information Exchange Guidance Document

- 2.1 As set out in SpC 9.20, TOs have a defined role in the Tender Support Activities required for an Onshore Transmission Tender Exercise, specifically related to the provision of information to the Delivery Body, and indirectly to qualifying bidders.
- 2.2 While SpC 9.20 outlines the obligations of the TOs, this Onshore Competition Information Exchange Guidance document provides additional detail regarding the specific activities required from TOs during an Onshore Transmission Tender Exercise and the relationship between TOs and the Delivery Body.

Onshore Competition Information Exchange Guidance overview

- 2.3 **Timeline**
- The frequency and expected timescales for information provision during the tender exercise
- 2.4 **Tender Pack Support**
- Details of Transmission Area specific information required for the tender pack
 - Format and process for managing these requests
- 2.5 **Formal Information Requests**
- Format and process for managing formal information requests during the tender process
- 2.6 **Facilitating site visits**
- Process for facilitating bidder site visits
- 2.7 **Confidentiality arrangements**
- Process for ensuring confidential information remains protected

3. Onshore Competition Information Exchange Timeline

Section summary

This section details the points at which TOs’ are required to engage in Tender Support Activities during an Onshore Transmission Tender Exercise and the expected duration of these activities.

Table 1: Onshore Competition Information Exchange Timeline

Tender Point	TO Activity	Expected duration
Stage Gate 2 (Pre-tender)	Providing information relating to the TO’s Transmission Area required for tender packs	~3 months
Stage Gate 2 (Pre-tender) / Invitation to Tender (ITT) stage	Facilitation/preparation of site visit	N/A
ITT Stage	Responding to formal information requests from the Delivery Body	14 weeks
Pre-tender / ITT stage	Responding to additional information requests	N/A

Pre-tender information provision

- 3.1 Part A of SpC 9.20 (Tender Support Activities in onshore electricity transmission) covers the provision of information and assistance to the Delivery Body.
- 3.2 TOs must provide the Delivery Body upon request with the technical and network information relating to the TO’s Transmission Area as is reasonably required to create the tender documentation. This information is required during the pre-tender stage and ahead of the tender launch.
- 3.3 While the pre-tender stage is expected to last for 43 weeks in total, it is expected that there will be a period of ~3 months where TOs will be required to provide information to the Delivery Body.
- 3.4 Paragraph 9.20.7 of SpC 9.20 outlines the obligation for TOs, where appropriate, to make arrangements with the Delivery Body to facilitate a site visit for qualifying bidders (see chapter 6 below). While preparations for site visits may commence during the pre-tender stage, any site visits will only take

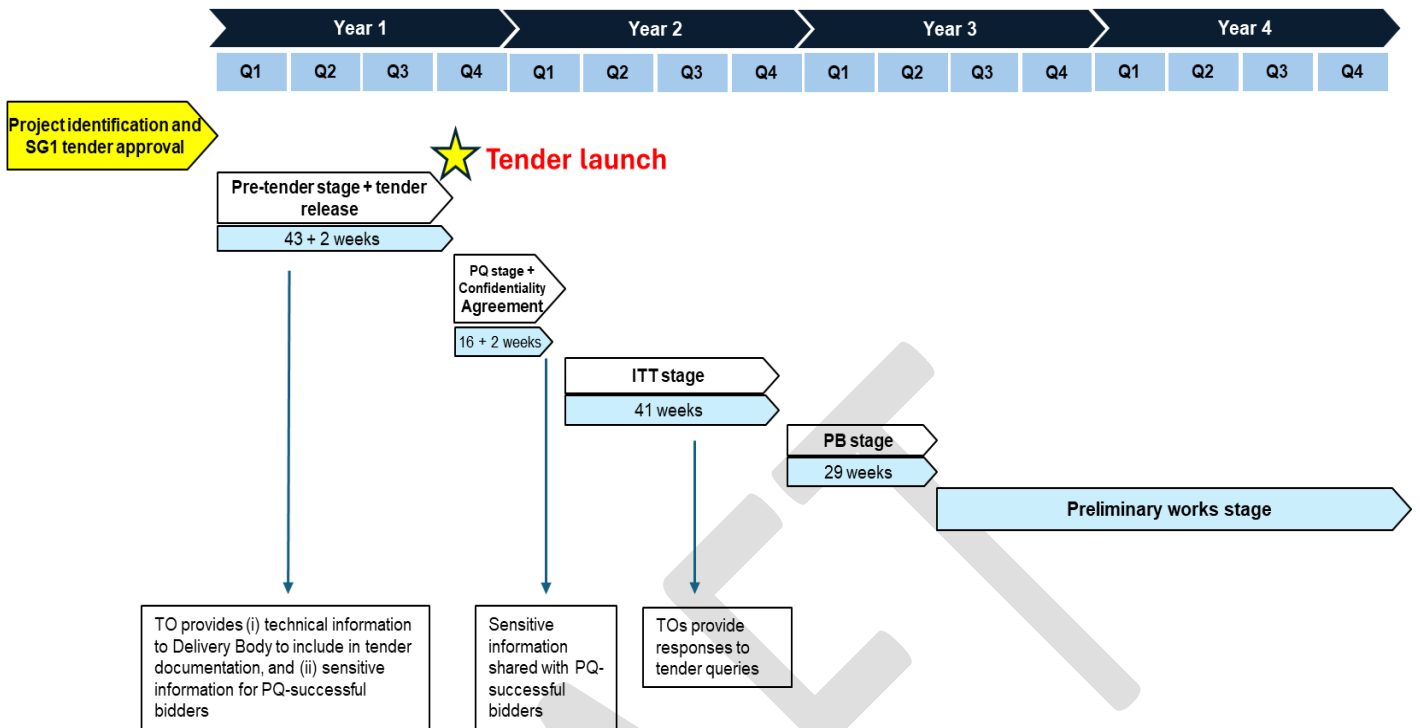
place during the Invitation to Tender (ITT) stage of the Onshore Transmission Tender Exercise.

Providing information during ITT stage

- 3.5 The ITT stage is expected to last 41 weeks and occurs after qualifying Bidders have been identified in the Pre-Qualification (PQ) stage and signed confidentiality agreements (see chapter 7 below).
- 3.6 During the ITT stage, there is a period of ~14 weeks in which TOs must respond to formal information requests related to the tender from the Delivery Body on behalf of bidders, in accordance with Chapter 5 below.
- 3.7 While we expect provision of information for the tender documentation and responding to formal queries during the ITT stage to be the only occasions during the tender process where TOs are required to provide information to the Delivery Body, there may also be other occasions where the Delivery Body requests information during an Onshore Transmission Tender Exercise. We expect the TOs to provide this information in accordance with existing information disclosure provisions in the licence and the System Operator Transmission Owner (STC) code.¹
- 3.8 For information requests outside of the pre-tender and ITT stages, in accordance with the obligation in paragraph 9.20.4 (c) of SpC 9.20, TOs should aim to respond to Delivery Body requests within 15 working days. If a TO considers it will take longer than this to provide the requested information, TOs are to inform the Delivery Body in writing and provide an estimated timeframe to provide the requested information.
- 3.9 The Delivery Body should take all reasonable steps to ensure that information requests relating to an Onshore Transmission Tender Exercise are made during the pre-tender and ITT stages outlined above and information requests outside of this should be clarificatory in nature.

¹ [System Operator Transmission Owner Code \(STC\) | National Energy System Operator](#)

Figure 1: Indicative tender process and TO information provision timelines



4. Tender Documentation Support

Section summary

This section details the information relating to a TO's Transmission Area that a TO is required to provide the Delivery Body when preparing the tender documents required for an Onshore Transmission Tender Exercise and the process for managing information requests.

Information relating to a TO's Transmission Area

- 4.1 Paragraph 9.20.4 (a) of SpC 9.20 requires TOs to provide to the Delivery Body upon request information relating to their Transmission Area required for the tender documentation for an Onshore Transmission Tender Exercise. The Delivery Body requires technical network data specific to the interface sites where a Competitively Appointed Transmission Owner (CATO) solution will connect into.
- 4.2 The Delivery Body will request information in two parts using the template in Appendix 1 – Part A concerns general network information while Part B provides TO-specific information.
- 4.3 Part A information includes:
- (1) Interface point details
 - (2) Fault level analysis
 - i. Busbar Fault details at point of interconnection
 - ii. Fault Level Infeed details at point of interconnection
 - (3) System impedance
- 4.4 Part B information, where applicable, must be provided to the Delivery Body and includes:
- (4) Interfaces with existing and future TO projects (if applicable)
 - (5) Integration into existing automation schemes (if applicable)
 - (6) Line connections (if applicable)
 - (7) Any other information that could reasonably be required to ensure the tender documentation is sufficiently detailed
 - (8) Connection feasibility reporting
 - (9) Earth return current

Process

- 4.5 The Delivery Body must request this information from the TOs in writing during the pre-tender stage. TOs must then confirm receipt of the request in writing to the Delivery Body and provide the Delivery Body with an estimated timeframe to respond to the information request, which must not exceed 90 days unless an extension is agreed by the Delivery Body.
- 4.6 The Delivery Body must inform the TO that it intends to submit an information request in relation to a tender exercise 14 days in advance of making the request. The Delivery Body must then submit the information request to the TO in writing, using the information request template (in Appendix 1) and any additional information the TO will require in order to complete the template. The 90-day response limit starts from the day the Delivery Body submits the information request.

Templates

- 4.7 The information request and response template that must be used to provide information to the Delivery Body are included in Appendix 1 to this document. Any changes to the template in terms of the type of information being requested will constitute a modification to the Onshore Competition Information Exchange Guidance and will follow the process set out in Part B of SpC 9.20 (Tender Support Activities in onshore electricity transmission).
- 4.8 Once completed, TOs are to submit the information template to the Delivery Body, and the Delivery Body must confirm receipt in writing.
- 4.9 If a TO is unable to provide the information requested it must provide an explanation to the Delivery Body. TOs should inform the Delivery Body at the earliest possible opportunity if it does not consider it possible to provide the requested information.

5. Formal Information Requests during ITT stage

Section summary

This section details the process for managing formal information requests from the Delivery Body to the TOs during the ITT stages in accordance with paragraph 9.20.4(b) of SpC 9.20.

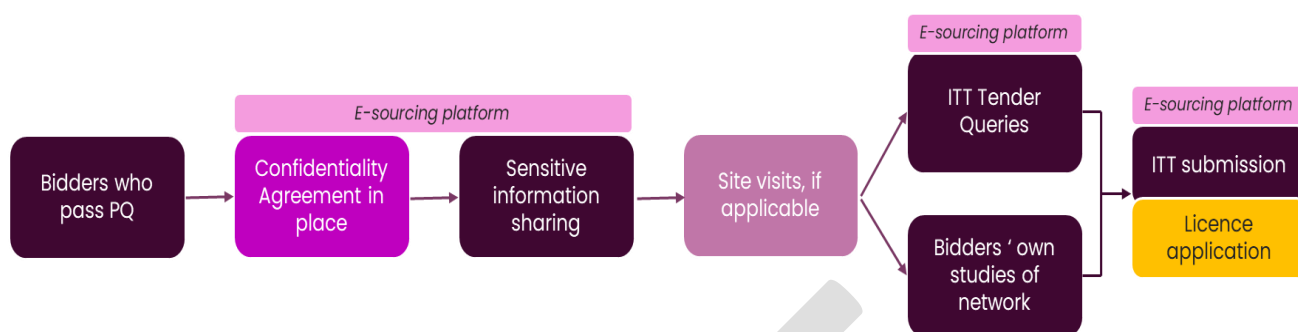
Process

- 5.1 During the ITT stage, the Delivery Body will manage the process for TOs responding to queries from Bidders who have passed PQ Stage and signed tripartite confidentiality agreements with the Delivery Body and the TOs.
- 5.2 Requests for information may be made during a 14-week period during the ITT stage. The exact starting point of this 14-week process may differ depending on the specific tender, therefore the Delivery Body must notify the TO(s) 14 days in advance of its intention to submit information requests.
- 5.3 During this process, the Delivery Body must collate, triage, and anonymise information requests from Bidders to ensure (i) the information being requested is reasonable and appropriate, and (ii) there is no unnecessary repetition of work for the TOs.
- 5.4 The Delivery Body is responsible for ensuring that information requests from Bidders are made within timeframes agreed and indicated in the tender documentation and are submitted to the Delivery Body in a consistent format.
- 5.5 To ensure a fair and transparent process, Bidders must submit queries relating to the tender to TOs via the Delivery Body and not contact the TO directly. The Delivery Body must then triage the queries to ensure that they are reasonable and appropriate, anonymise the queries and formally submit an information request to the TO. The TOs must not respond directly to any information request from a Bidder during the ITT stage.

Protection of information

- 5.6 To ensure confidential information remains protected, information must be exchanged through a secure E-sourcing platform with restricted and password-protected access. Information must only be exchanged with Bidders who have passed PQ Stage and there is a confidentiality agreement in place.

Figure 2: Exchange of information



5.7 Information provided to Bidders must only be available during the Onshore Transmission Tender Exercise process. Once the Provisional Preferred Bidder has been identified, all other Bidders must lose access to the E-sourcing platform and can no longer access information related to the Onshore Transmission Tender Exercise. Destruction of information after the Onshore Transmission Tender Exercise process must be done in accordance with the terms of the tripartite confidentiality agreement.

Information request and response timings

5.8 During the 14-week information exchange period during the ITT stage, the Delivery Body must notify the TO via email of the information request. The Delivery Body must make no more than one information request submission in any 7-day period however the submission can contain multiple information requests.

5.9 TOs are to respond to the Delivery Body within 14 days with the requested details in Table 2. If a TO does not consider it possible to respond to the information request within 14 days, it must inform the Delivery Body, provide an explanation for the delay, and agree an extended deadline to provide the information.

5.10 If a TO does not consider it appropriate to respond to an information request, for example if it does not consider the information relevant to the Onshore Transmission Tender Exercise or contains commercial sensitivities outside of the parameters of the Confidentiality agreement, it must inform the Delivery Body in the first instance. If the Delivery Body disagrees with the TO and considers the information is relevant to the Onshore Transmission Tender Exercise, the issue

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must be referred to the Authority. The Authority will make a decision within 10 working days of the referral from the Delivery Body.

- 5.11 In respect to an Onshore Transmission Tender Exercise, the Delivery Body must share responses provided by the TO with all Bidders of that Onshore Transmission Tender Exercise, regardless of which Bidder made the original information request.

Information request template

- 5.12 Formal information requests and responses during the ITT stage must be made in the following format before information is shared:

Table 2: Formal Information Requests Template

Project	[name of project]
Reference No.	[add sequentially]
Request title	[subject of request]
Date of Request	[date]
Information Required	[detail request]
Documents Attached	[yes, no]
Response date	[date of desired response]
TO Response	[TO to add]
Additional Information	[TO to add]

6. Facilitating Site Visits

Section summary

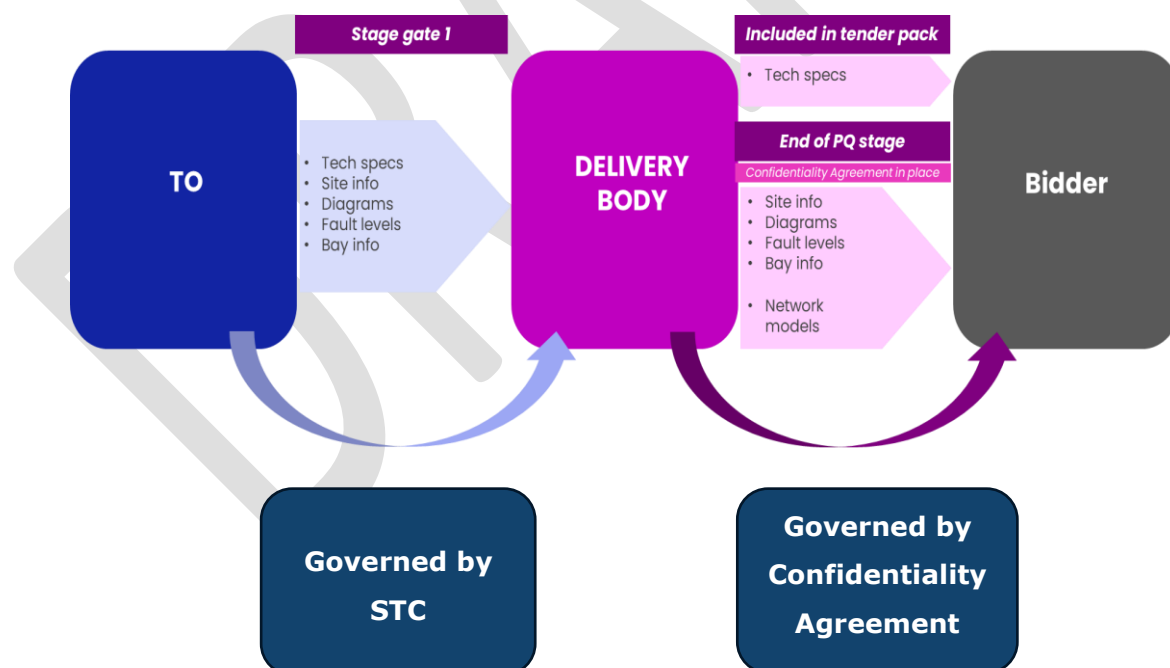
This section provides the process TOs and the Delivery Body are to engage in when facilitating site visits.

- 6.1 The purpose of the site visit is to enable qualifying Bidders to assess the interface arrangements at the site/s location/s (where appropriate) in order to assist development of their bid submissions.
- 6.2 During the ITT stage, paragraph 9.20.7 of SpC 9.20 obliges the TOs, where appropriate, to facilitate a site visit for Bidders. The Delivery Body must inform the TO of its intention to conduct a site visit at least 10 weeks in advance of the intended visit date and an appropriate date must be agreed with the TO(s).
- 6.3 TOs are expected to facilitate three representatives from each Bidder (unless the TO agrees to facilitate additional representatives), as well as representatives from the Delivery Body.
- 6.4 The TO is expected to facilitate a single site visit for all Bidders at the same time, however it can agree additional site visits with the Delivery Body at its discretion.
- 6.5 TOs must provide Personal Protective Equipment (PPE) and ensure all relevant health and safety protocols are in place. The Delivery Body is to engage with Bidders and inform the TO of PPE requirements at least 6 weeks in advance of the site visit.
- 6.6 When requested by the Delivery Body, the TOs will communicate to the Delivery Body:
 - The feasibility of the site visit request
 - Logistics to and from the relevant site
 - Date and time of visit (or proposal of alternatives if the requested date is not achievable).
- 6.7 If a TO does not consider it possible to facilitate a site visit during the ITT stage, for example due to site conditions, adverse weather, or resourcing issues, it is to inform the Delivery Body and the Authority and alternative arrangements can be considered.

7. Confidentiality arrangements

- 7.1 Information being exchanged between TOs, the Delivery Body and Bidders may be confidential and therefore our expectation is that tripartite confidentiality agreements are put in place at Stage Gate 1 between TOs, the Delivery Body and Bidders before information is exchanged.
- 7.2 Information sharing arrangements between the Delivery Body – and TOs are already in place and governed by existing protocols in the System Operator Transmission Owner (STC) codes.²
- 7.3 As part of the tender process, a standard confidentiality agreement will be signed by the Delivery Body and TOs at Stage Gate 1. The non-negotiable terms of the confidentiality agreements will then be shared with Bidders as part of the tender documentation, and will include disclaimers around validity periods. Bidders who pass PQ will then sign the confidentiality agreement and be able to access relevant tender information, as per Figure 3 below.

Figure 3: TO-Delivery Body-Bidder confidential information exchange



² [System Operator Transmission Owner Code \(STC\) | National Energy System Operator](#)

Appendix 1 – Pre-tender information request template

As part of our preparation for the 'Early Competition' tender, NESO require certain data to include in the tender documents which are specific to the interface sites where the solution is connecting into.

In order to detail this information, the NESO will require the incumbent TO to undertake a desktop-based detailed feasibility study assessment of connecting the proposed competed asset into the Main Interconnected Transmission System (MITS) at the proposed interface sites.

The scope of this study is comprised of the following:

1. Confirmation and verification of the Electricity Ten Year Statement (ETYS) model data as detailed in Part A for the connection year and worst-case scenario i.e. winter peak.
2. Provision of a connections report detailing the following information:
 - i. For connections at existing substations; clear identification of any spare bays available at each substation with clear bay identifiers suitable for connection of the proposed competed asset. Where there are no spare bays, explanation of the works required to extend the substation with indicative visual plans/diagrams for the location of the new bay with clear bay identifiers.
 - ii. For connections at proposed new substations; explanation of the works required to construct with indicative visual plans/diagrams for the location of the new bay(s) with clear bay identifiers suitable for connection of the proposed asset.
 - iii. Operational diagrams in line with either 2(i) or 2(ii) above.
 - iv. Existing Protection Key Line Diagrams in line with either 2(i) or 2(ii) above.
 - v. Indicative lead time to deliver the connection at each substation with an estimated earliest in-service date (EISD). This should clearly state the Indicative Completion Date for TO delivered infrastructure (inclusive of bay extension works and/or substation build) works at each site prior to the EISD date. This should summarise any programme risks, such as land purchase/lease extension that developers should be aware of.
 - vi. The report will include appropriate drawings identifying any TO owned non-operational land beyond the operational boundary of the site.

3. Provision of the data detailed in Part B

Part A

Fault Levels:

Substation Fault Levels – Busbar Fault details at point(s) of interconnection (if applicable)

Fault Level									
Substation Name	Substation Voltage (kV)	Three Phase Initial Peak Current (kA)	Three Phase RMS Break Current (kA)	Three Phase DC Break Current (kA)	Three Phase Peak Break Current (kA)	Single Phase Initial Peak Current (kA)	Single Phase RMS Break Current (kA)	Single Phase DC Break Current (kA)	Single Phase Peak Break Current (kA)

Fault Level- Infeed details at point(s) of interconnection (if applicable)

Fault Levels									
Circuit Name	Circuit Identity	Winter Maximum (3ph kA)		Winter Maximum (1ph kA)		Summer Minimum (3ph kA)		Summer Minimum (1ph kA)	
		Sub Transient	Transient	Sub Transient	Transient	Sub Transient	Transient	Sub Transient	Transient
[...]									

System Impedance:

Impedance							
Substation Name	Substation Voltage (kV)	Sk'' (MVA)	X/R ratio (peak)	Zsys (Ohm)	Rsys (Ohm)	Xsys (Ohm)	Zsys angle (degree)
[...]							

Part B

This section identifies data required to be provided by the incumbent TO.

Earth Return Current

Earth Return Current		
Substation Name	Substation Voltage (kV)	Earth Return Current
[...]		

Interfaces with existing and future TO projects (if applicable)

Interface Description	Timescale
State the key third party and scheme interfaces, e.g., DNO, Genco, other projects etc.	
[...]	

Integration into existing automation schemes (if applicable)

Automation Schemes	
Operational Tripping / Auto Close Scheme/ Active Network Management Scheme/Demand Tripping Scheme	
	Requirements
Title	[...]
Justification	
Operating Times	
Monitored Circuits	
Tripping Sites	
3 rd Party Impact	
Narrative	

Automation Schemes	
Operational Tripping / Auto Close Scheme/ Active Network Management Scheme/Demand Tripping Scheme	
	Requirements

Line Connections into existing (if applicable, for new connections)

Line Connections		
Circuit Identity	OHL Voltage (kV)	Details
[...]		
Narrative		