



# Building a grid-ready future for UK solar

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The UK solar industry is on the cusp of transformative growth. The government's Clean Power 2030 ambition, the newly published UK Solar Roadmap and parallel regulatory reforms across grid, planning and markets have created an environment more supportive than ever of large-scale solar deployment. But while the direction of travel is positive, the pace and complexity of change mean that solar developers must become more strategic, more proactive and more collaborative if they are to turn policy ambition into operational capacity.

At Natural Power, we work with developers and investors across the full lifecycle of renewable projects, from feasibility and grid strategy to consenting, engineering and ongoing asset optimisation. Our perspective is grounded in both technical delivery and commercial reality. The message we want to share is simple: UK policy is creating opportunity, but realising it will depend on timely, expert-led engagement across every stage of project development.

## **From vision to delivery: solar's role in Clean Power 2030**

The UK government's Clean Power Action Plan outlines the scale of the ambition: increasing solar capacity from just over 18 GW today to 45 to 47 GW by 2030, with potential to exceed that upper range based on system needs. This ambition is reiterated in the UK Solar Roadmap, which sets out a complementary suite of measures aimed at removing barriers to deployment, especially where solar is combined with battery storage.

Importantly, this growth target is not simply aspirational. It is underpinned by tangible

policy shifts that reshape how projects connect, secure revenue and navigate planning. That said, navigating these changes requires deep understanding of regulatory timelines and grid strategy. It rewards developers who act early and decisively.

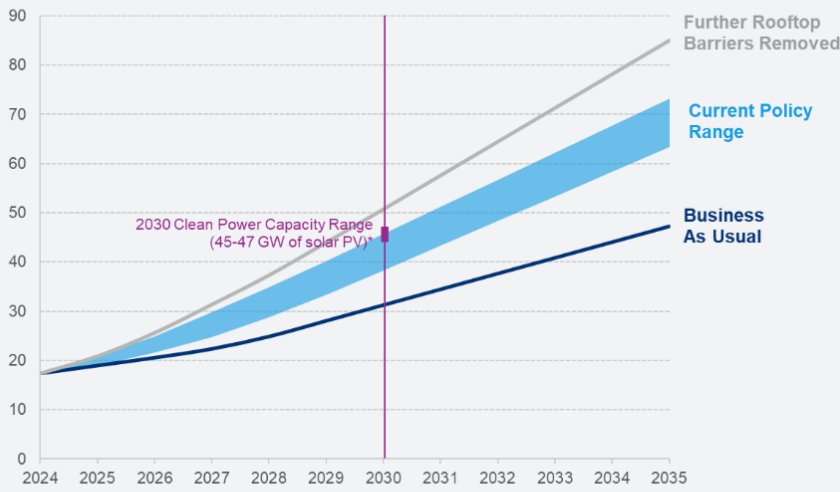
## **Grid connection reform: ready beats early**

One of the most consequential developments is the grid connection reform being led by the newly independent National Energy System Operator (NESO). The days of 'first-come, first-connected' are behind us. In its place comes a 'first-ready, first-connected' approach, which prioritises project maturity and strategic value over your position in the queue.

NESO is now actively reordering the queue, with developers required to submit evidence of project readiness. This is a fundamental shift. Those unable to demonstrate clear progress, whether in land rights, planning or financing, risk being deprioritised or even removed.

What does this mean in practice? Now more than ever, developers must prioritise grid strategy as central to project development.

**Figure 1: Illustrative solar deployment scenarios 2024-2035, Great Britain (GW)**



\* As noted above, although 45-47GW is our 2030 GB ambition for all solar, sufficient network capacity is available to exceed this level, subject to system need. Source: gov.uk

They should ensure robust, documented progress through NESO’s Gate 2 process and understand the implications of ‘strategic alignment,’ particularly the proposed regional combined capacity pots for solar at both transmission and distribution levels. Whilst the present connection queue shows an over-subscription in all areas, there is a significant volume of MWs that have not been progressed through their projects.

**CfD reform: greater flexibility, lower risk**

The government’s Contracts for Difference (CfD) mechanism remains the primary route to revenue certainty for solar developers, and its latest evolution, Allocation Round 7 (AR7), brings largely favourable changes.

From extended 20-year contracts (up from 15 years), to a broadened target commissioning window (increased from three to 12 months), the CfD mechanism is becoming more flexible and financeable. These updates reduce subsidy risk, improve bankability and enable developers to structure their projects with more confidence.

Solar dominated the last auction round, securing 90 of the 130 contracts awarded in AR6. With AR7 opening for applications in August 2025 and decisions due early 2026, developers must ensure they are ready to bid competitively, with consented, grid-viable projects that align with NESO and planning reforms.

**Planning reform: streamlining for scale**

Planning remains a known bottleneck for solar, both in the UK and across Europe. But reform is underway.

A key change is the increase in the threshold for solar projects to be considered Nationally Significant Infrastructure Projects (NSIPs), rising from 50 MW to 100 MW. This is significant. Projects between 50 and 100 MW will now be able to avoid the costly and complex NSIP process, streamlining the route to consent and making mid-sized developments more commercially viable.



Developers must still navigate a patchwork of planning processes across England, Wales and Scotland. But with Natural Power’s multi-jurisdictional expertise, developers can ensure they take the most efficient and appropriate path to planning success, supported by up-to-date environmental, ecological and stakeholder management strategies.

**Market reform: what REMA means for solar**

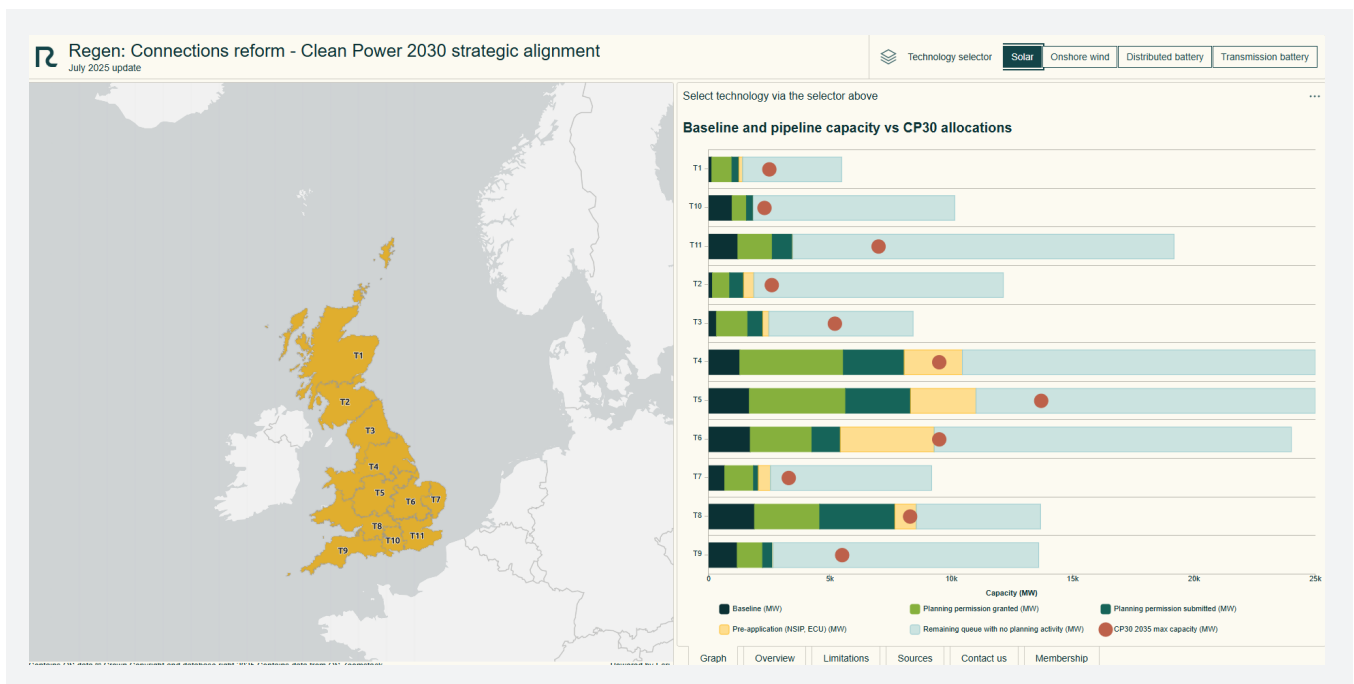
The Review of Electricity Market Arrangements (REMA) is perhaps the most complex and long-term of the government’s reform efforts. While the decision not to pursue zonal pricing removes some near-term uncertainty, questions remain, particularly around the future of Transmission Network Use of System (TNUoS) charges and the structure of the wholesale market.

The government’s upcoming Reformed National Pricing Delivery Plan is expected to address some of these questions later in 2025. For now, developers should continue to stress-test project economics under different future pricing scenarios and seek expert advice to understand grid charges, route-to-market options and curtailment risk in a dynamic and transitional energy market.

**Solar + storage: a systemic opportunity**

A strong theme in the Solar Roadmap, and in many of our client discussions, is the growing importance of co-located storage. Storage improves project economics, supports grid stability, and enhances flexibility in CfD delivery and PPA negotiation.

## Natural Power has a global reach, employing more than 500 staff across 14 international offices.



The roadmap calls for clearer modelling methodologies from the Electricity Networks Association (ENA) and publication of demand-side headroom data, which will better enable developers to evaluate the viability of combined solar and storage projects at specific grid connection points.

We are increasingly engaged at early project stages to model combined yield, capacity factors and revenue stack options for solar + storage developments. This approach is no longer optional; it's becoming standard best practice.

### What developers should do now?

The pace of regulatory change in the UK solar sector is high, and the level of complexity is growing, but the commercial signals are strong. The government is backing solar, not just with ambition, but with action.

To capitalise on emerging opportunities, developers should treat grid strategy as a critical path item rather than an afterthought. Projects must be aligned with NESO's strategic criteria and supported by strong evidence of progress. With Allocation Round 7 (AR7) on the horizon, it is essential to ensure

that planning, grid connections and financing are fully coordinated.

Developers should also stay informed about the implications of the Review of Electricity Market Arrangements (REMA) and the evolving market landscape. Maximising site value through co-located storage and flexible delivery strategies will be key. Finally, engaging experienced and integrated consultancy support can help manage risks and optimise outcomes.

### Looking ahead

The UK solar sector is entering a decisive phase. The policy framework is increasingly aligned with deployment goals but translating this into capacity on the ground will take foresight, precision and expert guidance.

We're already helping clients navigate this landscape, bringing together deep technical insight with commercial acumen and regulatory expertise. Solar is not just a growing part of the UK's energy mix, it's a cornerstone of its clean energy future. Success will favour those who are grid-ready, data-driven and strategically prepared.

### About Natural Power

With solar power being the largest renewable energy sector in the world, Natural Power has built a specialist team of solar energy experts who can assess the potential and development of new solar sites and deliver solar projects.

It offers support and advice on the successful development of solar and energy storage projects, from early-stage feasibility analysis to repowering and the optimisation of existing asset performance.

This dedicated solar team has advised on more than 40 GW of solar assets across 4,000 projects, supporting a global client base that includes project financiers, developers, owners and operators.

The business employs more than 500 staff across 14 international offices.

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