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London, 24th September, 2026

Subject: RIIO-3 Load Reopener May 2026 Consultation – NGET Northwest London Multi-Technology Reinforcement Package

Dear Ofgem,

STACK Infrastructure would like to respond to OFGEM RIIO-3 Load Reopener May 2026 consultation, specifically in relation to NGET application for the Northwest London Multi-Technology Reinforcement Package.

The proposed reinforcement works, including the 2nd circuit between Sundon and Elstree and between Elstree and St John's Wood, are critical enabling works for the Letchmore Heath Grid Supply Point (GSP). Our proposed Data Centre with a contracted connection, is dependent upon capacity being made available at the Letchmore Heath GSP.

Our project has already secured several million in committed funding, with further investment of several billion planned. It is also one of several major developments seeking a connection at Letchmore Heath GSP, with the combined investment value of these projects understood to amount to several billion pounds.

We understand that OFGEM's proposed response to NGET's application assigns the Northwest London Multi-Technology Reinforcement Package to Track 3 requiring additional scrutiny because the forecast costs exceed the £300 million threshold, rather than Track 2 as requested by NGET.

We are concerned that the Track 3 designation could result in additional time being required to secure authorisation for these works. Any resulting delay could have a material impact on the delivery of capacity at Letchmore Heath GSP and, consequently, on the delivery of our project.

This project has already experienced substantial delays. The connection date was October 2029 and has more recently been proposed for January 2031. Any further delay creates significant uncertainty for the project and could ultimately jeopardise its future viability by undermining confidence in the timescales for delivery of the required power capacity.

Given the scale of investment dependent upon the Letchmore Heath GSP and the strategic importance of the projects seeking to connect there, we respectfully request that OFGEM review its proposed response to NGET's application for the Northwest London Multi-Technology Reinforcement Package and considers how the necessary reinforcement works associated with releasing capacity at Letchmore Heath GSP can be authorised without avoidable delay, while maintaining the appropriate regulatory scrutiny.

The proposed movement of the Letchmore Heath GSP connection date to January 2031 is currently being discussed with NGET and Central Government, in coordination with the other 5 parties seeking

to connect at the GSP. The implications of the proposed Track 3 designation for the Northwest London Multi-Technology Reinforcement Package will also form part of these discussions, given the potential for further delays to affect the delivery of significant strategic infrastructure and associated investment.

We would welcome the opportunity to discuss these concerns with OFGEM in further detail and would be pleased to provide any additional information that may assist its consideration of this matter.

Yours Sincerely,



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