Mark and Focus

What is changing, brought into focus.



Industrial steam at dusk. Photo source

NOVEMBER 2026 / MONTHLY INTELLIGENCE

Before systems deliver

Capacity awards, fleet plans and the work that turns policy into operating services.



NOVEMBER 2026 / REVIEW DRAFT

Mark and Focus Monthly

Editorial direction and analysis by Mark and Focus.

This issue draws on analyses first published 2–8 November 2026, Pacific/Auckland. Dates on feature openers are website publication dates in Auckland. Official source dates retain their original jurisdictional context.

Photographs are licensed through Pixabay. The feature captions distinguish site photography from illustrative equipment. The cover is an illustrative industrial scene.

markandfocus.com · Mark and Focus Intel

In this issue

04 Editor’s introduction
HOW DECISIONS TURN INTO OPERATING SERVICES

06 Germany Awards Long-Term Capacity Before Plants Deliver
INFRASTRUCTURE FINANCE

10 Canada Opens Bus Planning Support Before Fleet Investment
SUSTAINABLE URBAN DEVELOPMENT

14 Ria Formosa Monitoring Adds a Continuous View of Lagoon Exchange
DIGITAL SYSTEMS & INTELLIGENCE

18 Scotland Connects Recycling Rules to Collection Capacity
CIRCULAR ECONOMY

22 Singapore Energy Labels Would Distinguish Higher Efficiency
ENVIRONMENTAL GOVERNANCE

25 Intelligence briefs
FOUR DEVELOPMENTS

29 Cross-system analysis
DIFFERENT DECISIONS, DIFFERENT PROOFS

30 What to watch
THE NEXT EVIDENCE TO LOOK FOR

31 About Mark and Focus
EDITORIAL MISSION

Before systems deliver

Several decisions in this issue reduce uncertainty long before they deliver a service.

Germany's capacity awards put a price on a commitment that will be tested later. Canada's federal bus call funds the expertise needed to design a transition before operators order vehicles. The two decisions are far apart in scale and sector. Both are clearer when readers identify exactly what the public decision buys and what the delivery organisation still has to do.

The same distinction matters when the investment is smaller. At Portugal's Ria Formosa, an observing buoy can bring continuity to a system sampled in visits. The installation creates a new way to ask a question. Its value will come from a record long enough to interpret, alongside the other stations being built out in the lagoon.

> EDITOR'S NOTE
>
> These are decisions in sequence. Follow the evidence at the next stage to understand what each announcement changes.

Where policy meets the operating system

Scotland's consultation starts with collection design and the quality of the material it produces. The decision passes through household space, collection rounds and local discretion before a tonne of better separated material reaches a recycler.

Singapore's consultation approaches an analogous problem at the point of sale. A label must help buyers distinguish higher efficiency in a market where earlier standards have already removed some less efficient products. Minimum standards and the label each have a different job. That distinction shapes what a retailer must stock and what a buyer can see.

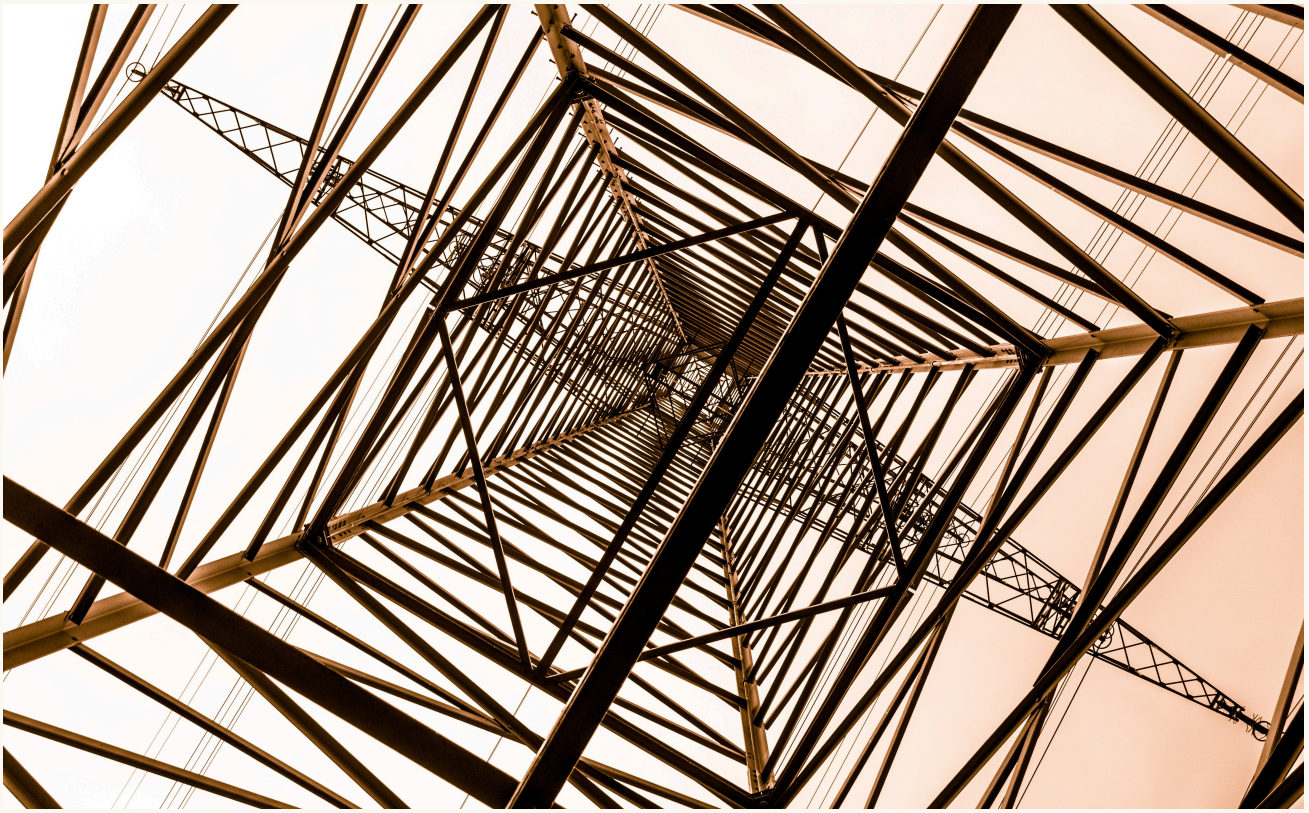
The November briefs carry the same reading discipline into carbon fees, waste-to-power commissioning, aviation reserves and water mains finance. In each case, the next document, reading or transaction will tell us more than the initial announcement can.

INFRASTRUCTURE FINANCE / GERMANY

Germany Awards Long-Term Capacity Before Plants Deliver

Germany’s first long-term auction commits future availability. Delivery depends on which projects reach operation and how much capacity they can supply under stress.

BY MARK AND FOCUS / 04 NOVEMBER 2026



Looking upward through a high-voltage transmission tower. Illustrative grid infrastructure, with no identifiable project or place. Photo source

INFRASTRUCTURE FINANCE / 01

Why the Megawatts Are Adjusted

Germany's first long-term capacity awards put a price and a set of winning bids behind a future electricity-availability obligation. On November 3, 2026, the Bundesnetzagentur announced eleven awards totaling about 5,160 megawatts of reduced capacity. Understanding that adjusted measure is essential before treating the result as new power already available to the grid.

The auction compares capacity after applying reduction factors. These factors translate nominal plant capacity into the contribution recognized by the procurement. For storage, the tender distinguishes resources by the duration over which they can supply power. Within an eligible pool, individual factors are weighted by nominal capacity.

This addresses a practical comparison problem. Two resources with the same nameplate rating can make different contributions when electricity is scarce. A resource's headline output says little about how long it can sustain that output. Adjusting the capacity creates a common basis for the obligation being bought, while leaving the adequacy of the adjustment method open to scrutiny.

An investor therefore has two quantities to consider: the physical capacity it builds and the reduced capacity for which it can bid. Confusing them could overstate either the procured contribution or the revenue available to support an investment. The award total should always retain its reduced-capacity label when compared with other infrastructure figures.

INFRASTRUCTURE FINANCE / 02

What the First Result Shows

The regulator received 41 bids offering about 11,958 reduced megawatts. Seven bids were excluded, including for missing mandatory information or evidence. The awarded total exceeded the announced 4,500-megawatt volume because the bid that first crossed that volume was also accepted.

The weighted average award value was €155,296 per reduced megawatt per year, against a ceiling of €244,000. Those figures describe this procurement result. They do not establish the cost of every future round or the total cost of operating the winning resources.

Competition has revealed what successful bidders were prepared to accept for the defined obligation. It has not yet demonstrated that each project can be completed at its expected cost. That distinction matters for interpreting a low award price: the price is evidence about bids, while construction and availability require a later delivery record.

INFRASTRUCTURE FINANCE / 03

An Award Starts Further Obligations

The tender specifies a fifteen-year commitment period. It also requires a realization security for awards lasting more than one year. The regulator's published timetable places the deadline for that security on December 8, 2026, with the relevant transmission system operator acting as the security office.

A financial security makes non-delivery consequential before the long operating period begins. For the buyer, it connects an accepted offer to a further commitment from the bidder. For project sponsors, it means liquidity and guarantees belong in the delivery plan alongside engineering and procurement.

The length of the obligation creates a related discipline. A project must make sense across the period it has offered to support, rather than only at the auction date. Financing decisions need to account for the resource's expected operating capability and the obligations attached to the award.

The most informative next account will follow the winning capacity through those obligations into delivery. Awarded reduced megawatts, financial security and an operational resource are separate milestones. Keeping them separate allows readers to judge where investment has progressed and where the electricity system still depends on a future commitment being fulfilled.

> WHAT TO WATCH
>
> Distinguish the adjusted capacity counted by the tender, each project's nameplate capacity, and the availability ultimately proven in operation.

SOURCE REGISTER

- Germany publishes first StromVKG long-term capacity awards
- First long-term capacity tender: results and delivery obligations
- StromVKG statutory framework
- Read the published Mark and Focus analysis

SUSTAINABLE URBAN DEVELOPMENT / CANADA

Canada Opens Bus Planning Support Before Fleet Investment

A federal call puts depot, route and charging advice ahead of fleet capital, with up to C$15 million available for planning support.

BY MARK AND FOCUS / 02 NOVEMBER 2026



Tight detail of a charging connector against orange vehicle bodywork. It illustrates charging hardware and does not depict a Canadian depot or bus. Photo source

SUSTAINABLE URBAN DEVELOPMENT / 01

Selecting the Organizations That Will Help Operators

Canada's October 29 bus planning call puts advice ahead of the next round of zero-emission bus investment. Housing, Infrastructure and Communities Canada is seeking one or more not-for-profit organizations or academic institutions to support municipalities and transit agencies as they prepare fleet transitions. The immediate purchase is planning capacity, with up to C$15 million available, rather than another announced batch of buses.

The call runs to January 14, 2027. Applicants may apply alone or as a consortium, and the successful organizations will work directly with transit operators. This creates a delivery layer between the federal fund and the agencies making fleet decisions: specialist support can reach several operators instead of each agency having to assemble every capability independently.

That arrangement has an advantage when a decision needs skills an operator does not require at the same intensity every year. Modeling, technology assessment and procurement preparation can be substantial tasks during a transition. Sharing access to those skills can support a more considered investment decision. It still leaves each operator needing to understand the advice well enough to own its eventual choice.

The eligibility boundary is also clear. This intake seeks organizations positioned to provide services across Canada, while municipalities and agencies are the intended users of that support. Confusing the two would misread both who is applying and what the federal money is buying.

SUSTAINABLE URBAN DEVELOPMENT / 02

Planning Must Reach the Operation of the Fleet

The services can cover feasibility studies, technology assessments, fleet transition planning, infrastructure and utility considerations, procurement planning and workforce readiness. The call allows planning for battery-electric buses, hydrogen fuel cell buses and other eligible zero-emission technologies. It does not declare a single technology the correct choice for every service.

A fleet transition therefore needs more than a comparison of vehicles. A vehicle choice has consequences for the supporting site, the supply of energy and the work needed to keep service running. Advice that treats the bus separately from those conditions can leave the operator with an attractive specification that is difficult to put into daily use.

The planning task is to make those consequences visible early enough to affect the purchase. Infrastructure and utility considerations belong in the same decision as the deployment strategy because a fleet cannot rely on an energy supply that its site is not ready to receive. Workforce preparation likewise has to relate to the equipment and operating arrangements eventually chosen.

A Capital Boundary That Clarifies the Purpose

The application page expressly excludes capital infrastructure projects. Bus purchases, charging or refueling infrastructure, buildings, construction, land and other capital assets are not eligible costs under this stream. An operator cannot treat the new support call as an open application for a depot or fleet purchase.

This separation can improve the quality of the later capital request. A planning exercise can compare options before the applicant commits to a particular asset, while capital support can then be assessed against a more developed project. The October announcement says a new Zero Emission Transit Fund capital intake will open in the coming months; it does not give this call's applicants an automatic capital award.

The broader fund already distinguishes planning studies from capital projects. Its explanation includes buses and associated charging, refueling and facility needs, and describes coordination with the Canada Infrastructure Bank. Those wider arrangements provide context for the transition, but their existence does not expand the eligible costs of this particular call.

SUSTAINABLE URBAN DEVELOPMENT / 03

From Advice to Decisions an Agency Can Defend

The announced services include performance measurement, knowledge-sharing and capacity building as well as assessments and deployment strategies. These functions matter after the initial report is delivered. An agency needs to explain why it selected an option, identify the assumptions behind it and compare later operating experience with what the plan expected.

Knowledge-sharing can reduce repeated work, especially when several agencies face similar planning questions. It should still preserve the differences that determine a local decision. A shared method can help agencies ask consistent questions without making their service patterns, sites or investment schedules interchangeable.

The current evidence establishes an open competition for support providers and the kinds of work they may perform. It does not yet identify successful applicants, completed plans or emissions achieved through this allocation. The strongest eventual evidence would show that operators used the advice to resolve a specific uncertainty before committing capital: a fleet specification, an infrastructure sequence or a procurement choice that is better grounded because the planning took place.

> WHAT TO WATCH
>
> Watch whether planning support reaches agencies without in-house specialist teams and gives them a credible basis for fleet and depot decisions.

SOURCE REGISTER

- October 29 launch announcement
- Planning support application requirements
- Zero Emission Transit Fund program
- Read the published Mark and Focus analysis

DIGITAL SYSTEMS & INTELLIGENCE / PORTUGAL

Ria Formosa Monitoring Adds a Continuous View of Lagoon Exchange

A new buoy at the Faro–Olhão inlet adds continuous water and weather observations to a growing lagoon network.

BY MARK AND FOCUS / 05 NOVEMBER 2026



Blue water, low dunes and distant hills in the Ria Formosa lagoon. The photograph shows the lagoon landscape. Photo source

DIGITAL SYSTEMS & INTELLIGENCE / 01

Ria Formosa Monitoring Adds a Continuous View of Lagoon Exchange

Ria Formosa monitoring gained a new observing point on October 20, 2026, when the University of Algarve's marine and environmental research center, CIMA, installed the SIMONA buoy at the Faro–Olhão inlet. Positioned between Deserta and Culatra islands, the equipment records water conditions where the protected lagoon exchanges water with the ocean.

The installation was financed through EQUIPAR+2 under Portugal's Recovery and Resilience Plan. CIMA describes the buoy as part of a developing monitoring network, alongside an operating station near Praia dos Cavacos and a further station planned near Faro's commercial quay.

DIGITAL SYSTEMS & INTELLIGENCE / 02

Water Readings With Their Weather Context

SIMONA records temperature, salinity, pH and dissolved oxygen. Its weather station also observes wind intensity and direction and solar radiation. Bringing these measurements together gives researchers a record of water conditions alongside the atmospheric conditions that accompany them.

The analytical value lies in continuity as well as location. An isolated sample establishes a condition at one moment. Repeated observations make it possible to examine variation over time and compare measurements with the circulation and exchange processes researchers are studying. The installation announcement does not yet provide an observed long-term trend.

DIGITAL SYSTEMS & INTELLIGENCE / 03

From Observations to Decisions

CIMA intends to combine the stations' data to support numerical models and decision tools. It also identifies potential applications in early warning for pollution, contamination and other environmental risks. Those are intended uses of the evidence, rather than proof that a complete warning service has already been delivered.

The distinction matters for evaluating the investment. Installing sensors establishes a capacity to observe. A warning tool would additionally need an interpretation of the readings and a way for responsible users to act on them. The public announcement does not establish those operating arrangements.

CIMA says the observations will be made openly available through an online visualization platform. That prospective access can widen the audience for the measurements, while the immediate achievement remains concrete: a new continuous record at the lagoon–ocean boundary.

> WHAT TO WATCH
>
> The first test is continuity. A sustained record can show whether a reading is an isolated event or part of a recurring pattern.

SOURCE REGISTER

- CIMA installs environmental monitoring buoy in Ria Formosa
- Read the published Mark and Focus analysis

CIRCULAR ECONOMY / SCOTLAND

Scotland Connects Recycling Rules to Collection Capacity

A consultation puts separation quality, general-waste capacity and local service exceptions into the same household recycling decision.

BY MARK AND FOCUS / 03 NOVEMBER 2026



Four colour-coded household wheelie bins in front of a timber fence. The photograph illustrates collection equipment and does not specify Scottish bin colours. Photo source

CIRCULAR ECONOMY / 01

Separate paper before it loses quality

Scotland's proposed recycling rules reach beyond the question of which bin a household should use. The consultation opened on October 29, 2026 examines how the collection service itself shapes sorting: what materials residents can separate, how much general waste the service accepts and when a different arrangement is justified. Responses close on January 21, 2027.

The draft promotes greater use of twin-stream collections, keeping paper and card apart from plastic, metal and cartons. The practical objective is cleaner material, rather than separation for its own sake. A collection can capture a large quantity while leaving some of it poorly suited to recycling because different materials have become mixed or contaminated.

Consistent definitions of accepted materials address another part of that problem. Residents need instructions that correspond to the service actually available. Changing a label without changing collection and treatment arrangements would leave the disposal decision unresolved. The proposal therefore combines the physical arrangement of collections with clearer communication and nationally recommended bin colors.

For councils, this creates a delivery question. Separate streams require a workable way to collect and handle them. A household instruction is credible only where the following collection route preserves the separation it requests. That is why material quality and service design belong in the same discussion.

CIRCULAR ECONOMY / 02

Measure capacity across the collection cycle

For kerbside households with their own bin, the draft proposes a maximum effective residual capacity of 60 liters per week. It does not prescribe one bin size or collection frequency. A 120-liter bin collected fortnightly and a 240-liter bin collected every four weeks provide the same average weekly allowance, although residents experience the schedules differently.

This approach would let councils change frequency while retaining functional bins. It also makes comparisons clearer: the size of a container alone says little about the amount a service accepts over time. The consultation asks whether the ceiling should instead be 70 or 80 liters, so the proposed figure should not be presented as an adopted national limit.

Reducing residual capacity is intended to encourage greater use of recycling and food-waste collections. The policy relies on those alternative routes being available. The draft excludes households without food-waste collection and properties using shared bins from the proposed maximum, and calls for exemptions where unavoidable waste arises from circumstances such as family size or medical needs.

CIRCULAR ECONOMY / 03

Keep equivalent outcomes within reach

A national service expectation meets different property layouts, storage constraints and collection conditions. The draft supports assessing whether its approach is technically, economically and environmentally practicable. Where councils cannot reasonably provide the standard model, they are encouraged to consider alternatives delivering equivalent recycling outcomes.

That qualification preserves the purpose of consistency without assuming identical containers will suit every address. Where space prevents twin-stream containers, for example, the draft asks councils to consider whether sorting after collection could achieve equivalent quantity and quality. The comparison concerns the recovered material as well as the convenience of the collection arrangement.

The consultation has not established that these changes have already improved Scotland's national recycling performance. It sets out a proposed service and the reasoning behind it. Its strongest implementation question is whether each household can move from a clear instruction to an accessible collection and then to material that can actually be recycled.

> WHAT TO WATCH
>
> Compare material quality and service coverage together. A rule that improves one stream can still fail where the collection design is impractical.

SOURCE REGISTER

- Household recycling consultation
- Dry recyclable collections
- Residual capacity
- Flexibilities
- Read the published Mark and Focus analysis

ENVIRONMENTAL GOVERNANCE / SINGAPORE

Singapore Energy Labels Would Distinguish Higher Efficiency

A proposed two-tier label aims to make higher efficiency visible again as earlier standards narrow the range of appliances on sale.

BY MARK AND FOCUS / 05 NOVEMBER 2026



Close view into a washing-machine drum with pink laundry. It illustrates a product class covered by the proposal. Photo source

SOURCE REGISTER

- NEA consultation on energy-label revamp and additional appliances
- Existing Mandatory Energy Labelling Scheme and Minimum Energy Performance Standards
- Read the published Mark and Focus analysis

ENVIRONMENTAL GOVERNANCE / 01

The Sales Floor and the Consumer Signal

Singapore energy labels could move from a multiple-tick rating to two tiers under a National Environment Agency consultation opened on October 21, 2026. NEA is also proposing minimum performance standards and mandatory labels for selected household fans, washing machines and dishwashers. Feedback closes on November 9; implementation is intended by 2028, subject to consultation.

The proposal responds to a specific effect of earlier regulation. As minimum standards have tightened, less efficient products have left the market and the efficiency range for several product groups has narrowed. A label designed to distinguish products therefore needs to remain legible as the underlying market changes.

Minimum Energy Performance Standards determine which regulated goods may be supplied. The Mandatory Energy Labelling Scheme helps customers compare the products that remain available. The two controls reinforce each other, but they make different decisions: one governs entry to the market, while the other makes performance visible at purchase.

NEA's existing registration system gives these requirements an administrative route. Suppliers must register both themselves and regulated products before supplying them. Consumers are directed to the database of registered goods. The proposed label redesign would sit within that regulated market, rather than replace the obligation to demonstrate compliance.

Under the proposal, products would carry either an Energy Label or an Energy Label with a High Energy Efficiency Mark. The higher mark would distinguish performance above the prevailing minimum requirements. A product without that higher mark would not automatically be unregulated or unlawful; it could occupy the basic compliant tier.

A Badge Cannot Explain Every Difference

The proposed labels retain annual energy consumption, estimated annual energy cost and product information, with a product-specific QR code providing additional information electronically. These details preserve a way to compare models even where the prominent label has only two classifications.

ENVIRONMENTAL GOVERNANCE / 02

A Badge Cannot Explain Every Difference

For buyers, the distinction is practical. A high-efficiency mark communicates a threshold achievement, while the consumption figure describes the energy associated with a particular model under the assessment conditions. Looking at both avoids expecting a single badge to answer every question about capacity, running cost or household use.

NEA says the higher-efficiency thresholds would take account of lifecycle costs, the availability of more efficient models and technological and market developments. This makes the boundary between the tiers a substantive regulatory choice. It must reward improvement without making the upper tier depend on products that are barely available.

Different Appliances Need Different Tests

The proposed expansion also shows why one visual label cannot mean one universal engineering measure. Fans are assessed through an efficiency index using service value and blade diameter. Washing machines are assessed through energy use per unit of capacity. Dishwashers use an energy-efficiency index linked to program consumption and reference consumption.

Those measures relate performance to the function being provided. Comparing raw electricity use alone could favor a smaller or less capable appliance without showing whether it performs its intended task efficiently. Product-specific tests give the common label a technical basis appropriate to each category.

The consultation defines boundaries as well as additions, including covered fan types and washing-machine capacities. These boundaries matter to suppliers because an appliance category in everyday language can be wider than the equipment covered by a regulation.

NEA will set out transition arrangements and timing after considering feedback. The current decision is therefore about the proposed rules and their design. Evaluating the change means asking whether the two tiers remain backed by credible tests, clear product coverage and accessible model information as the market improves.

ENVIRONMENTAL GOVERNANCE / 04 NOVEMBER

Rate design is still open

The review committee considered three paths and requested more evidence. Its deliberation gives regulated entities a reason to model alternative rates and discounted pathways, while the current rate remains the applicable baseline. Watch for the next official decision and the date it takes effect.

Taiwan Carbon Fee Review Keeps Three Options Open
Taiwan requests further evidence before carbon-fee decision

CIRCULAR ECONOMY / 06 NOVEMBER

Trial generation reaches the grid

During commissioning, the Palembang project exported trial electricity to Indonesia's PLN grid. The published December 8 target for commercial operation is a separate milestone. Watch for metered deliveries, steady waste intake and evidence of how the service will be paid for.

Palembang's Waste-to-Power Trial Reaches the Grid
Palembang Commissioning and Commercial Operation Target

INFRASTRUCTURE SYSTEMS / 06 NOVEMBER

A second call on jet-fuel reserves

Switzerland authorized another use of emergency jet-fuel stocks after a renewed supply shortfall. The reserve can bridge an interruption. The durability of that response depends on the restoration of ordinary supply and the replenishment of released stocks.

Swiss Jet Fuel Stocks Cover a Second Supply Shortfall
Mandatory Stocks Bridge a Renewed Jet Fuel Shortfall

INFRASTRUCTURE FINANCE / 05 NOVEMBER

Water mains financing advances

The European Investment Bank approved financing for mains renewal at CILE in Belgium. The approval advances the funding case for the programme. Track when contracting and construction follow, and whether renewed sections are delivered on the published timetable.

CILE Water Mains Renewal Advances Through EIB Approval
CILE Water Supply Systems & Sustainability project sheet

Different decisions, different proofs

The German auction creates a future obligation. The Canadian call creates a route to specialist advice. Portugal's installation creates a continuous observing point. Each one has a different unit of proof: verified availability, a plan an operator can act on, or a sustained data series.

For Scotland and Singapore, implementation runs through decentralised choices. A council must be able to collect separated material under real route and storage constraints. A retailer must be able to apply a label that distinguishes products reliably. In both cases, the service design will determine whether an apparently clear policy reaches its intended users.

> READING THE NEXT ANNOUNCEMENT
>
> Identify the accountable operator, the next decision and the evidence that would establish delivery. Keep all three distinct from the headline number.

Five next signals

Germany

Distinguish the adjusted capacity counted by the tender, each project’s nameplate capacity, and the availability ultimately proven in operation.

Canada

Watch whether planning support reaches agencies without in-house specialist teams and gives them a credible basis for fleet and depot decisions.

Portugal

The first test is continuity. A sustained record can show whether a reading is an isolated event or part of a recurring pattern.

Scotland

Compare material quality and service coverage together. A rule that improves one stream can still fail where the collection design is impractical.

Singapore

Track the final tier thresholds separately from the minimum requirements that determine whether a product can be sold.



About Mark and Focus

Mark and Focus follows the decisions that shape cities, infrastructure, climate, finance, technology and environmental systems. Its reporting links policy announcements to the agencies, operators and investment choices that determine what happens next.

Find the full articles, desk coverage and the latest intelligence online.

markandfocus.com · Mark and Focus Intel on LinkedIn

Mark and Focus

MARK AND FOCUS MONTHLY / NOVEMBER 2026

What is changing, brought into focus.

markandfocus.com