



SONI Forward Work Plan 2024-25

Appendix 7
Self-Assessment

Northern Ireland
September 2024

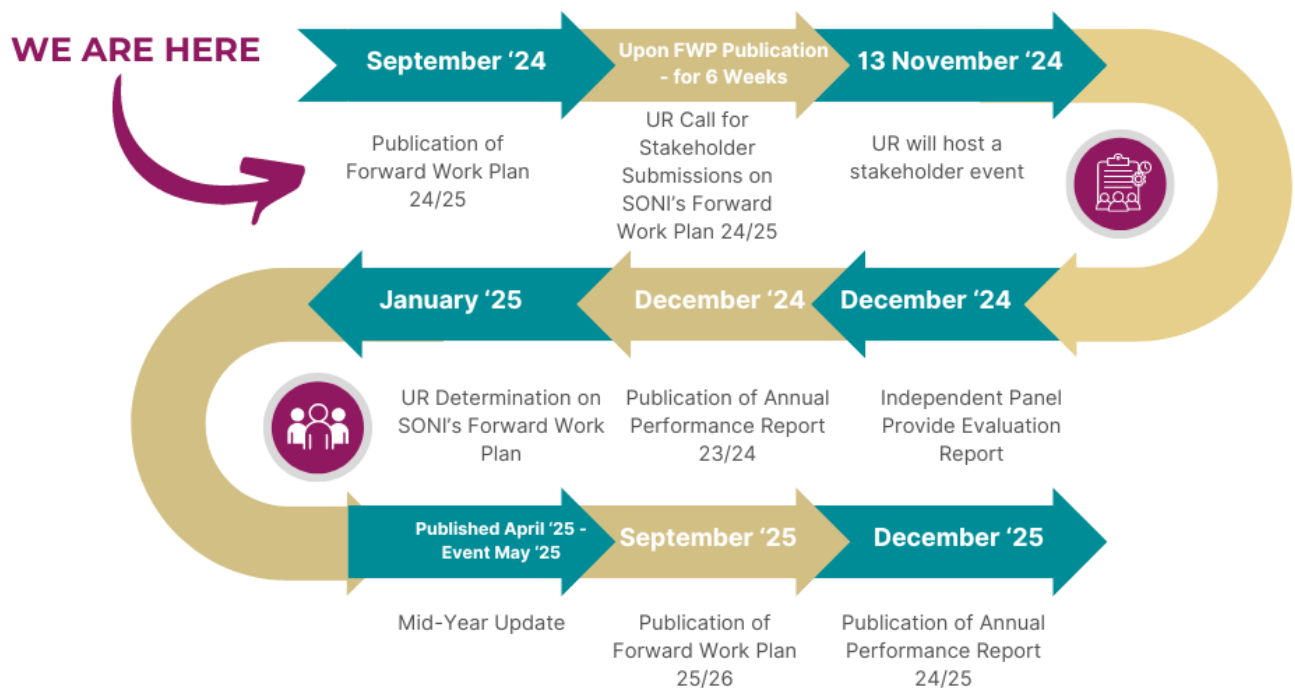
Section 1

Introduction

Overview of the Evaluative Performance Framework Process

The Evaluative Performance Framework was introduced by the Utility Regulator (UR) in order to provide SONI with a performance incentive mechanism as part of the 2020-25 Price Control Final Determination.

This process is summarised in the figure below.



This publication completes the first step in the process above. The UR will request stakeholder submissions on SONI's publication in order to provide feedback from all stakeholder segments to the Independent Panel in order to assist the panel with their evaluation.

Please also note there is a stakeholder event scheduled for 13th November 2024, following the call for submissions closure, to provide a forum for SONI to present on the Forward Work Plan and take questions and comments from stakeholders.

Assessment Criteria

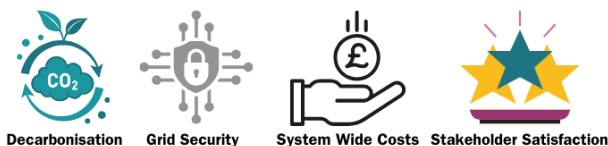
SONI are assessed by the Independent Panel using the UR's Evaluative Performance Framework Guidance document (see Chapter 4, pages 17-23 of the UR's Evaluative Performance Framework Guidance).

The Forward Work Plan will be assessed on the following criteria:

ASSESSMENT CRITERIA

01 SERVICE AMBITION

The degree on ambition for improvements over time included in the plan, in relation to the 4 SONI outcomes(below), relative to past performance and existing working practices and processes.



02 UR SERVICE ALIGNMENT

The extent to which the new initiatives and areas of focus presented in the plan are aligned with the service priorities set by the UR (which in turn would be informed by stakeholders) or otherwise supported by strong evidence.

03 STAKEHOLDER ENGAGEMENT

The quality of stakeholder engagement and participation in developing the plan and responsiveness that the plan shows to the views and concerns of stakeholders (to the extent not captured under alignment)

04 SERVICE ACCOUNTABILITY

The degree of clarity on SONI's planned activities and initiatives and how the success or performance in relation to these would be assessed (E.g. detailed specification of deliverables and measures of success).

Self-Assessment

In the remainder of the document, SONI have highlighted our views against how the plan meets the assessment criteria and what changes have been made since the previous assessment.

We have provided our self-assessment of SONI's performance for the Forward Work Plan 2024-2025 in the table below.

SONI Self-Assessment against Forward Work Plan 2024-25

	Role 1 System Operations & Adequacy	Role 2 Independent Expert	Role 3 System Planning	Role 4 Commercial Interface
Weights	27.5	25	25	22.5
Criterion	S c o r e			
1 Service Ambition*	1	1	0	0
2 UR Service Priority Alignment	0	0	0	0
3 Stakeholder Satisfaction	0	1	1	0
4 Service Accountability	0	0	0	0
Assessment Total	2	3	1	0
Assessment Grade	4	5	4	3
Overall Forward Work Plan Grade	4.025			

*Service Ambition is worth double the weight of the other 3 criterion

Role 1 System Operations and Adequacy

How the plan meets the assessment Criteria

Service Ambition

The projects contained within role 1 are ambitious, however they are focused on delivering tangible, measurable outcomes that will directly benefit consumers in Northern Ireland while driving progress towards net zero. One of the key projects included in SONI's Forward Work Plan 2024-25 is the 80% SNSP Operational trial. This trial is a major step in SONI's efforts to transition to a low-carbon energy system and reflects our strong ambition to lead in renewable energy.

The complexity and scale of this project underline SONI's commitment to addressing the challenges of decarbonisation while maintaining grid stability and security. By achieving this, we will significantly reduce reliance on fossil fuel and increase the share of renewables in the energy mix, directly contributing to Northern Ireland's net zero targets. The deliverables contained within Role 1 are designed to be both ambitious and achievable, and SONI believe that we have set a high bar in terms of innovation and service ambition. The projects we have outlined are not only technically challenging but also offer significant benefits to consumers across Northern Ireland. SONI believe that our role in leading these initiatives will place us at the forefront of delivering transformative change.

SONI has assessed that the 2024– 2025 Forward Work Plan **exceeds expectations** for this criterion.

UR Service Priority Alignment

The projects included within role directly support delivery of government targets for a low-carbon future. Each project is focused on sustainability, decarbonisation and ensuring grid reliability.

SONI has reviewed last year's Forward Work plan to ensure that the projects listed within role 1 are directly aligned with the URs service priorities. By assessing past performance, we have identified key area for improvement and built on them to meet these service priorities.

SONI consider that the Forward Work Plan 2024-25 **meets expectations** for this criterion.

Stakeholder Engagement

SONI has extensive and ongoing collaboration with key industry stakeholders and Regulatory Authorities. Given the complexity and technical nature of the projects in role 1, we have prioritised significant engagement at every stage to ensure alignment and transparency. For each project, we have provided detailed information on planned engagement activities, outlining clear strategies for collaboration and communication.

The 80% SNSP trial, in particular, will require substantial coordination with the Department for Economy, Regulatory Authorities and key industry stakeholders. SONI's ongoing efforts to increase engagement through the SOEF Advisory Council and the developments of the FASS project further demonstrate our commitment to transparent and proactive communication.

SONI consider that we **meet expectations** for this criterion.

Service Accountability

SONI aim to be transparent in our reporting and we have provided detailed historical data for each KPI, where appropriate, and set clear targets for the upcoming year as outlined in Appendix 5: SONI Performance Measures. Additionally we have removed Dispatch Down costs from our KPIs due to a significant change in Dispatch Down in 2023, which is beyond SONI's control. This change is primarily due to increased Interconnector imports since 2022, making it an unsuitable KPI for evaluating performance.

SONI consider that we **meet expectations** for this criterion.

Role 2 Independent Expert

How the plan meets the assessment Criteria

Service Ambition

The rollout of the Public Engagement Model and Landowner Charter is a pivotal initiative. This project aims to raise awareness about our role in maintaining and developing Northern Ireland's electricity grid. By educating the public on the importance of a reliable transmission system, we can enhance public understanding and trust. Furthermore, this initiative will help improve proactive engagement, ensuring that stakeholders are well-informed and involved in the process.

Supporting the NI Energy Strategy is another key area where we provide independent expert advice to planning consultations and working groups established by DfE. This collaboration plays a crucial role in helping achieve government targets while fostering strong cooperation between industry stakeholders and government bodies. Together, we aim to accelerate the transition to net zero by offering expert insights and facilitating policy alignment. Our ongoing work related to SONI's next price control, SPR26, is essential in setting out clear objectives and forward-thinking strategies that extend well beyond 2030. Ensuring SONI are suitably funded will guarantee that we can run the business efficiently and meet future challenges with resilience.

Addressing Dispatch Down issues is another critical aspect of the work SONI is engaged in. SONI is focused on addressing the issues of dispatch down with the aim of reducing the costs through effective planning and implementation.

Similarly, the development of the TSO-DSO operating model is vital to managing system with high levels of variable renewable generation and low-carbon technology. This model will help maximise system flexibility while ensuring the security and stability of the electricity grid in Northern Ireland.

The Systems Need Assessment report for TESNI project is instrumental in informing future planning efforts. This report supports the renewable transition by helping SONI understand how to develop and maintain the grid to meet future energy demands effectively.

Overall, SONI believe that these projects demonstrate our commitment to ambition and excellence in service, showcasing our proactive approach to ensuring Northern Ireland's energy infrastructure is fit for the future. Through these initiatives we consider that we have **exceeded expectations** in terms of the service ambition criteria for role 2 in the 2024-25 Forward Work Plan.

UR Service Priority Alignment

SONI has continued to have effective engagement ongoing collaboration with key stakeholders. This focus is central to our business, and the projects detailed within the Independent Expert role are designed to ensure ongoing and meaningful engagement with key stakeholders. These efforts will directly contribute to the SONI Outcome of Stakeholder Satisfaction. The ongoing work with the NI Energy Strategy, exemplifies our commitment to whole system collaboration, which is significant in contributing towards the SONI outcome of Grid Security and Decarbonisation. Similarly, the work on SONI's new Price Control, SRP26, is instrumental in ensuring that we are fully resourced and funded to deliver decarbonisation in Northern Ireland. SONI consider that we are aligned across these projects and the URs service priorities and believe we **meet expectations** for this criterion.

Stakeholder Engagement

SONI consider that we have made significant progress in strengthening our approach and deepening our engagement with key stakeholders since the publication of last year's Forward Work Plan.

As part of the Public Engagement Model and Landowner Charter rollout project, SONI are creating a comprehensive programme of strategic engagement, focusing on both public and landowners. The rollout of the new Landowner Charter is a critical component, and SONI will be partnering with Rural Support to develop a landowner engagement pack and outreach project. This initiative is designed to foster stronger relationships with landowners while addressing concerns and ensuring their involvement is valued. In addition, we are developing and implementing a new landowner compensation model, which will further enhance our engagement by providing fair and transparent compensation for impacted parties.

To support the development of SONI's next Price Control, SRP26, we have also designed an extensive stakeholder engagement programme. This includes incorporating feedback from previous year's reports to continuously improve our approach. A key outcome of this is the decision to publish our Stakeholder Action plan alongside our Forward Work Plan. This Action plan outlines all planned engagement activities for the year, which is a significant step forward as SONI strive to enhance our engagement with both industry stakeholders and the public.

In June 2024, SONI published our Stakeholder Engagement Strategy, which includes an Engagement Evaluation Framework. This framework provides a thorough assessment of SONI's performance, utilising a range of metrics such as quantitative data from engagement surveys and qualitative insights from survey comments. While this is the first year of implementing the framework, the benchmark data will be available in the 2023/24 Performance Report. Going forward, this framework will be crucial in evaluating and improving the effectiveness of our engagement efforts.

Additionally, SONI have established a Stakeholder Advisory Challenge Group, made up of key industry stakeholders, which meets quarterly. This group plays a significant role in providing input on SONI's Price Control submission and advising on other key areas of work including maintain grid security and supporting the transition to net zero.

SONI believe that through these initiatives, we have demonstrated a robust and proactive approach to stakeholder engagement, ensuring transparency, inclusivity and continuous improvement in our engagement efforts. SONI therefore believe that we have exceeded expectations for the stakeholder engagement criteria and believe that these efforts not only meet the service criteria but also set the foundation for long term collaboration and trust with our stakeholders.

Service Accountability

SONI published the Stakeholder Engagement Strategy in June 2024. A key component of the strategy is the Engagement Evaluation Framework, which serves as tool to assess the effectiveness of our stakeholder engagement efforts. The framework incorporates a range of metrics, including quantitative data from engagement surveys and qualitative insights gathered from stakeholder feedback. By using these varied data points, we will gain a comprehensive understanding of how well our engagement efforts are resonating with stakeholders.

The framework will be instrumental in our ability to demonstrate accountability, as it allows us to track our progress, identify areas for improvement, and refine out engagement practices accordingly. We anticipate that as the framework becomes fully embedded within SONI, it will enable us to continually enhance our stakeholder engagement, ensuring we remain responsive to stakeholder needs and aligned with our goals.

SONI consider that the Forward Work Plan meets expectations for the service accountability criterion. SONI are confident that we are delivering on our service accountability commitments while fostering strong relationship with our stakeholders. framework will be crucial in evaluating and improving the effectiveness of our engagement efforts.

Role 3 System Planning

How the plan meets the assessment Criteria

Service Ambition

SONI have a series of significant initiatives planned for 2024-25 aimed at strengthening the electricity grid and ensuring long-term stability and sustainability.

One of our key projects is the North-South Interconnector, which will play a critical role in enhancing the security of supply across the island of Ireland. This project will strengthen the reliability and resilience of the electricity grid, ensuring a stable and uninterrupted supply for all consumers. Additionally, the interconnector will support the integration of renewable energy sources, making it a cornerstone of our efforts to facilitate the transition to a cleaner, more sustainable energy system.

Another important focus is the project on Transmission nodes at/reaching capacity. This projects focus is addressing areas where additional capacity is needed at bulk supply points. SONI are working closely with NIE Networks to assess existing infrastructure to pinpoint capacity constraints and propose viable solutions to enhance capacity. This work is essential for improving connection opportunities, enabling more effective network management, and enhancing our ability to forecast future demand accurately.

The Energising Belfast project is also significant. This project is vital for improving security of supply in the city and ensuring grid resilience. It will replace outdated assets and modernise older infrastructure, significantly improving overall system performance and reliability.

Through these projects, SONI consider that we are demonstrating a forward-thinking approach to system planning, ensuring that we not only meet current demands but future-proof the grid in line with evolving energy needs and the push for renewable integration. SONI consider that the work for Role 3 in the Forward Work Plan meets expectations.

UR Service Priority

SONI have reviewed the 2023-24 Forward Work Plan and have provided more detailed information that clearly outlines how each project aligns with the relevant service priorities and supports achievement of SONI outcomes. A significant aspect of this role is whole system collaboration, as we work closely with NIE Networks on various elements of the system planning process .

This collaborative approach ensures that all key stakeholders are engaged, and that we are collectively driving towards the delivery of robust, efficient, and sustainable planning outcomes. This approach contributes to the SONI outcome for Decarbonisation, Grid Security and Stakeholder satisfaction.

SONI considers that we **meet expectations** for this criterion, helping to ensure the success of overall system planning processes.

Stakeholder Engagement

SONI have detailed a series of comprehensive and proactive initiatives aimed at fostering collaboration and transparency with key stakeholders. A significant effort is our work on the Transmission Clusters Consultation. With an increasing number of transmission-scale renewable generators expected to seek connections in the coming years, this project is crucial for supporting the transition to a net zero energy system. SONI are collaborating closely with NIE Networks and industry to develop a policy that will enable the efficient development of new infrastructure for generation connections. Through workshops with industry, the Utility Regulator, and NIE Networks, we are engaging stakeholders in shaping this policy. This proactive engagement will help achieve faster connection times and improved grid reliability, both of which are essential for the future energy landscape. Similarly our work on the Firm Access Quantity Methodology consultation demonstrates our commitment to robust stakeholder engagement. We are planning to engage and coordinate with NIE networks to progress this important initiative, ensuring that all stakeholders are aligned and informed throughout the process.

The establishment of the Joint PMO is another example of extensive stakeholder collaboration. This project requires significant internal engagement across our organisation and NIE Network, as well as external stakeholder feedback and support in the development of the programme. By facilitating this joint programme, we are ensuring that the process of system planning is collaborative, transparent, and focused on delivering effective outcomes for all parties involved. Additionally, SONI have recently completed an internal project aimed at reforming our grid development process to optimise delivery. Following the project's completion, we are continuing to engage with NIE Networks to explore opportunities for further collaboration. This will help us develop a forward-looking programme of work for future grid developments, ensuring that we remain adaptable and responsive to evolving stakeholder needs.

SONI consider that we have **exceeded expectations** for the stakeholder engagement criterion in the Forward Work Plan 2024-25. SONI believe that we have positioned ourselves as a trusted and effective partner in the drive toward a more resilient and sustainable energy system.

Service Accountability

SONI is committed to open and transparent practices and continuous learning. To enhance our system planning capabilities, we have successfully completed an internal project to reform our grid development process to optimise delivery. SONI maintain active engagement with NIE Networks and other key stakeholders to identify opportunities for collaboration and develop a forward-looking programme of work for future grid developments. The grid development process establishes clear stages, expectation and accountability measures, ensuring that our planning aligns with the URs Service accountability criteria. Additionally, SONI's Engagement Evaluation Framework will allow us to gather valuable feedback from all stakeholders, enabling us to refine our processes and continuously improve our service delivery.

In considering this, SONI has assessed that the 2024–2025 Forward Work Plan **meets expectations** for Service Accountability in Role 3.

Role 4 Commercial Interface

How the plan meets the assessment Criteria

Service Ambition

The Low Carbon Inertia Services (LCIS) project plays a pivotal role in awarding contracts that will enable a more flexible and decarbonised electricity system. The project is necessary to relax operational constraints and accommodate higher levels of wind and solar generation, key to reducing carbon intensity and meeting renewable energy targets. Following the successful completion of the tender process in phase 1, we are now commencing phase 2 in 2024-25. This next phase aims to deliver additional services that will further relax the minimum conventional units online constraint and address locational considerations.

By doing so, we will facilitate the integration of more low-carbon generation sources and significantly reduce the grid's carbon footprint. This aligns with broader efforts to achieve net zero and enhances the systems' ability to procure and accommodate a wider range of renewable energy technologies, improving overall flexibility in electricity supply.

In addition to the environmental benefits, this project will enhance grid stability and security, ensuring a reliable energy supply while supporting the decarbonisation of the power sector. SONI believe that our efforts in this role highlight a forward-thinking approach contributing both to the stability of the grid and the achievement of long-term climate goals.

SONI consider that we **meet expectations** for service ambition in the role 4 in the Forward Work Plan 2024/25.

UR Service Priority

SONI consider that we have successfully aligned the LCIS project detailed in Appendix 4, with UR Service priorities by identifying its strategic theme and ensuring it contributes to our goals. By awarding contracts that facilitates a low-carbon future, the LCIS project actively contributes to the SONI outcome for decarbonisations. Additionally the projects emphasis on engagement and collaboration will enhance grid security, reduce system wide-costs and increase stakeholder satisfaction.

SONI would consider that it **meets expectations** for the UR Service Priority Alignment for this role.

Stakeholder Engagement

SONI have prioritised stakeholder engagement throughout the course of the LCIS project to ensure all relevant parties have the opportunity to express their view and contribute meaningfully. We conducted two consultations with stakeholders, providing them with a platform to voice their opinions and feedback. In addition to these consultations, SONI have maintained a consistent flow of communication with Regulatory Authorities through workshops and fortnightly meetings. These sessions allowed us to provide regular updates on progress and gather valuable input, ensuring transparency and alignment with regulatory expectations. SONI believe that this proactive stakeholder engagement has been essential in advancing the LCIS project, fostering collaboration, and supporting the project's goals. As a key enabler of delivering net zero, our engagement strategy ensures that the project is aligned with broader sustainability objectives while addressing the concerns and requirements of all involved parties.

SONI therefore consider that we **meet expectations** regarding stakeholder engagement for role 4 in the Forward Work Plan 2024-25.

Service Ambition

SONI established our Engagement Evaluation Framework in June 2024, as part of SONI's Stakeholder Engagement Strategy. We are currently gathering baseline data to accurately assess our performance. Once we have this data, we will be able to provide a more comprehensive and transparent evaluation of our activities and accountability.

As a result of the above, SONI considers that we **meet expectations** in relation to the Service Accountability criterion for Role 4 in the Forward Work Plan 2024-25.