

SONI Annual Performance Report

2022 – 23

Appendix 6 SONI Self-Assessment

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Contents

Overview of the Evaluative Performance Framework Process	3
Assessment Criteria	4
Role 1 Independent Expert	6
Role 2 Independent Expert	8
Role 3 System Planning.....	10
Role 4 Commercial Interface	13

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 the figure below.



Figure 1 Overview of the Evaluative Performance Framework

This publication completes the last 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.

Assessment Criteria

SONI is assessed by the Independent Panel using the UR's [Evaluative Performance Framework Guidance](#) document (see Chapter 5, pages 24-29 of the UR's Evaluative Performance Framework Guidance).

The Performance Report is assessed on the following:

01	Delivery	The extent to which SONI deliver against: (a) the specified deliverables and/or performance commitments from its Forward Plan, and (b) the specified price control outputs (or deliverables) set by the Utility Regulator for new initiatives, and the justification for this delivery
02	Stakeholder Satisfaction	The extent to which stakeholders are satisfied with the performance of SONI, taking its performance in 2019/20, as supplemented by its Forward Plan, as its Baseline
03	Adaptability	The extent to which SONI has shown successful adaptation and agility, to the benefit of the SONI outcomes, in responding to opportunities not anticipated in the Forward plan

Figure 2 Performance Report Assessment Criteria

Self-Assessment

In the remainder of the document, SONI has highlighted our views against how we have performed against the assessment criteria.

We have provided our self-assessment of SONI's performance for the Forward Work Plan 2022-2023 in the table below.

Table 1 SONI Self-Assessment against Performance Report 2022-2023

Weights		Role 1 System Operation and Adequacy 27.5	Role 2 Independent Expert 25	Role 3 System Planning 25	Role 4 Commercial Interface 22.5
Criterion	Criterion	Score	Score	Score	Score
1	Delivery	0	1	-1	1
2	Stakeholder Satisfaction	1	1	1	0
3	Adaptability	1	1	0	0
Assessment Total		2	3	0	1
Assessment Grade		4	5	3	3
Overall Grade	Performance Report	4.00			

Role 1 Independent Expert

How the performance meets the assessment Criteria

Table 2 Role 1 Assessment

Assessment Criteria	SONI Actions
Delivery	<p>26 Milestones:</p> <ul style="list-style-type: none"> • 18 Completed • 8 Partially Completed <p>Of the 8 remaining milestones which are not complete:</p> <ul style="list-style-type: none"> • 5 are SONI-related delays • 2 were delayed for reasons outside of SONI's control. • 1 is postponed to secure an improved outcome for consumers <p>SONI fully completed most projects within our control. We factored in the strategic nature of the 18 projects completed and how these will benefit consumers and meet the SONI Goals On this basis, we consider that this demonstrates that SONI has met expectations to deliver on projects detailed within Role 1 of the Forward Work Plan.</p>
Stakeholder Engagement/Satisfaction	<p>SONI has conducted extensive engagement with relevant key stakeholders throughout the year to ensure there is sufficient feedback from industry to progress projects, such as Future Arrangements System Services (FWP23-01) and Scheduling & Dispatch (FWP23-02)</p> <p>SONI has increased engagement from the activities we have been involved in over the period with TSO Demand Side Strategy (FWP23-05) alongside our engagement associated with the Capacity Auction Process (FWP004).</p> <p>SONI remains committed to building on existing relationships and furthering engagement with stakeholders. In comparison to the base year of 2019, SONI considers that we have demonstrated a step change in engagement.</p> <p>SONI has assessed that the 2022-2023 performance exceeds expectations for this criterion.</p>
Adaptability	<p>SONI has demonstrated adaptability across Role 1, particularly given the challenging programme of work.</p> <p>SONI responded in an agile manner to changing regulatory priorities within FASS – diverting resources to work on the Layered Procurement Framework (LPF) quarterly auctions design, at the request of the Regulatory Authorities.</p>

	<p>Within Control Centre Tools (FWP005), the Voltage Trajectory Tool is extremely complex and highly innovative - there is no “off-the-shelf” solution to leverage and when complete, SONI and EirGrid will be the only TSOs in the world with this capability. The project was delivered using an Agile methodology. Development followed an Agile Scrum sprint delivery roadmap.</p> <p>Throughout Role 1, projects have been reviewed and adapted based on differing requirements.</p> <p>As a result, SONI has assessed the 2022 - 2023 performance and considers that it exceeds expectations for this criterion.</p>
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Role 2 Independent Expert

How the performance meets the assessment Criteria

Table 3 Role 2 Assessment

Assessment Criteria	SONI Actions
Delivery	<p>19 Milestones:</p> <ul style="list-style-type: none"> • 18 Completed • 1 Partially Completed <p>The 1 remaining milestone which is not complete is a delay outside of SONI's Control</p> <p>SONI has the least number of external dependencies within this role and successfully delivered all project milestones except one which was beyond SONI's control.</p> <p>Additionally, SONI reacted to stakeholder feedback and went above and beyond in this role by delivering 2 additional projects that were not included in the Forward Work Plan. This demonstrates SONI's commitment to ensuring a high standard of delivery for all projects and highlights how SONI exceeded expectations within this role.</p>
Stakeholder Engagement/Satisfaction	<p>SONI has held a number of Shaping Our Electricity Future Advisory Council Meetings (FWP018) over the period which also provided updates on the progress of the pillars which form our Shaping Our Electricity Future Roadmap.</p> <p>Extensive stakeholder engagement took place to inform the development of the Stakeholder Needs Assessment (FWP23-12). Over 90 SONI stakeholders were identified across different areas of the organisations and different stakeholder groups and approached to participate in a mixture of in-depth interviews or a quantitative survey.</p> <p>In addition, an online survey between June 28, 2023, and July 10, 2023, of a representative sample of 500 adults ages 21+ in Northern Ireland was commissioned and undertaken by Penta. The survey considered the surveyed public's views in relation to key areas of energy policy, such as security of supply, consumer priorities and NI's renewable energy targets. The survey also considered the public's understanding and perceptions of SONI and gauged their desire to hear from SONI further.</p> <p>The stakeholder aspect of the research found that 86% of stakeholders who participated were very (36%) or somewhat (50%) satisfied with their engagement with SONI.</p> <p>The stakeholder research considered areas such as perceptions of SONI, the areas SONI should be prioritising, SONI's strengths and areas which require improvement and views in relation to how SONI engages.</p>

	<p>In addition to the extensive suite of projects included in the 2022/23 Forward Work Plan, SONI has been adaptable and has initiated two additional projects based on feedback from stakeholders, Tomorrow's Energy Scenario Northern Ireland (TESNI) and Constraints Report (NI). The development of both of these additional projects was informed around stakeholder engagement.</p> <p>SONI has made significant strides in enhancing stakeholder engagement in this role. SONI remains steadfast in our commitment to further strengthen engagement with stakeholders by actively listening, responding to feedback and consistently seeking innovative ways to elevate stakeholder satisfaction.</p> <p>Therefore, SONI assesses that it exceeds expectations against this criterion.</p>
Adaptability	<p>SONI has demonstrated adaptability by remaining flexible in its approach to projects within this role. In Shaping Our Electricity Future Version 1.1 (FWP018), as an all-island project, the project team has had to respond quickly to a number of revisions to policies and targets in Ireland, including the publication of sectoral emissions limits in July 2022 and Climate Action Plan 2023 in December 2022. This has required fast revisions to assumptions and subsequent modelling. This was in addition to the engagement with DAERA on the Climate Change Act for Northern Ireland.</p> <p>During preliminary work, the challenge with delivering 80% RES-E targets led the project team to perform an assessment of a wide range of flexibility technologies to ensure the targets could be met; this work was beyond the original scope of the project.</p> <p>The Mid-Year Performance Review (FWP23-15) was the first of its type within the Evaluative Performance Cycle. The development of this report and the framework as whole has required an incredible amount of input and collaboration across the SONI business.</p> <p>SONI reacted to feedback to the Forward Work Plan and incorporated the delivery of TESNI into our plans in addition to the other projects. This is in recognition of the strategic nature of this project. In addition, SONI has had to practice adaptability throughout development of TES 2023. This included:</p> <ul style="list-style-type: none"> • Stakeholder alignment on the scope and approach to be taken for TES 2023 • Developing the TES 2023 scenario framework, modelling and assessment of electricity demand and generation • Concurrent and integrated analysis and reporting for Northern Ireland and Ireland • Engagement with stakeholders pre-consultation and addressing stakeholder feedback where appropriate <p>This proactive approach across the projects within Role 2 not only highlights SONI's agility but reflects our commitment to evolving and meeting the dynamic needs of the energy landscape in Northern Ireland. In our assessment, we consider the performance exceeds expectations for this criterion.</p>

Role 3 System Planning

How the performance meets the assessment Criteria

Table 4 Role 3 Assessment

Assessment Criteria	SONI Actions
Delivery	<p>23 Milestones:</p> <ul style="list-style-type: none"> • 13 Completed • 7 Partially Completed • 3 Not Progressed yet <p>Of the 10 remaining milestones which are not complete:</p> <ul style="list-style-type: none"> • 7 are delayed for reasons outside of SONI's control • 3 are postponed to secure an improved outcome for consumers <p>Due to the impact of external dependencies and unforeseen resourcing constraints SONI's ability to deliver all proposed projects within the anticipated timelines detailed in the Forward Work Plan, was significantly impacted. The delivery for Role 3 has fallen short of expectations.</p>
Stakeholder Engagement/Satisfaction	<p>SONI had extensive stakeholder engagement for projects detailed in this role.</p> <p>The first phase of the official stakeholder engagement for Energising Belfast Project (FWP027) commenced on 11th October 2022 with a launch event held in Belfast and attended by key stakeholders. This was the official opening of the consultation period which remained open until 25th November 2022. Throughout this consultation period, SONI completed two separate drop-in public information events, as well as several direct engagements with interest groups, council officials and elected representatives.</p> <p>In line with best practice, each consultation event hosted by SONI had an open invitation and was advertised through the local press. A campaign of social media activity on Twitter and LinkedIn also shared information on the project, and directed people to SONI's Consultation Portal, where feedback could be submitted.</p> <p>SONI also established a dedicated webpage¹ containing information about the project, distributed copies of advertisements containing details of each event in high footfall areas and made a dedicated email address and relevant contact details publicly available.</p> <p>The Mid Antrim upgrade (FWP034) particularly had successful engagement with the public and local community. This provided sufficient feedback to allow SONI to make adequate decisions on the proposed new infrastructure in the Mid Antrim Area.</p>

¹ [The Project \(soni.ltd.uk\)](http://soni.ltd.uk)

	<p>SONI actively sought to gauge stakeholder satisfaction through the Citizen Sounding Board with the feedback being positive and encouraging.</p> <ul style="list-style-type: none"> • 100% of participants either agreed or strongly agreed with the statement 'I was given enough information to form opinions on new subjects. • 100% of participants either agreed or strongly agreed with the statement 'I can see clearly that my views were taken into consideration throughout this process. • 83% of participants either agreed or strongly agreed with the statement 'I understand how the Mid Antrim Upgrade will help Northern Ireland meet its 80% renewable energy target by 2023. • 100% of participants either agreed or strongly agreed with the statement 'Processes like these should be used more by SONI to inform their decision making. <p>The full report can be viewed here.</p> <p>This demonstrates SONI's commitment to understanding and meeting the needs of stakeholders, reinforcing our efforts to consistently improve and exceed expectations. The model of engagement involved in the Mid Antrim upgrade was shortlisted as a finalist in the Working in Collaboration category at the Business in the Community NI Awards.</p> <p>Considering this, SONI has assessed that the 2022 - 2023 performance exceeds expectations in this area.</p>
Adaptability	<p>SONI has demonstrated adaptability within the Eden-Carnmoney project (FWP036). New information arising from both the stakeholder engagement and then new developments in late 2022 led to a change in the options being brought forward from one down to a single preferred option.</p> <p>Previously it had been determined that some measure of preconstruction development of both options would be necessary to make a decision. Once new information came to light this was quickly incorporated into the cost-benefit analysis and changed the TNPP submission. This will deliver cost and time savings over the life of the project.</p> <p>In the development of a Delivery Plan for NI Infrastructure Projects (FWP23-26), the Plan is reviewed on an annual basis. All projects have been reviewed in the context of global supply chain difficulties, internal resourcing in both SONI and NIE Networks, and outside factors affecting delivery (e.g., the planning process).</p> <p>Where possible, efficiencies have been identified and brought forward – for example, we identified a need for more than 20 110/33 kV transformers as part of the Plan through the TDPNI Working Group. SONI and NIE Networks are working to implement measures that reduce risk to the overall programme.</p> <p>Through the analysis carried out in Shaping Our Electricity Future (FWP018), key projects have been identified for integration of renewable generation (and achievement of mandatory targets). These have been prioritised in the Plan and called out in the TDPNI.</p>

	<p>SONI's adaptability was further evidenced in managing the Mid Antrim Upgrade (FWP034) due to the geographical spread of this project and engaging with local communities posed a significant challenge.</p> <p>To overcome this obstacle, SONI established a community forum and citizen sounding board. These initiatives effectively served as a representative sample and ensured broad participation and feedback from the 3 council areas.</p> <p>The innovative and adaptable approach facilitated insights enabling SONI to incorporate other perspectives while encouraging meaningful engagement, this ultimately contributed to more informed decision making and strengthened community relationships contributing to informed decision making and strengthened community relationships.</p> <p>As a result, SONI considers that it has met expectations in this area.</p>
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Role 4 Commercial Interface

How the performance meets the assessment Criteria

Table 5 Role 4 Assessment

Assessment Criteria	SONI Actions
Delivery	<p>8 Milestones:</p> <ul style="list-style-type: none"> • 5 Completed • 3 Partially Completed <p>Of the 3 remaining milestones which are not complete;</p> <ul style="list-style-type: none"> • 2 were delayed for reasons outside of SONI's control • 1 is postponed to secure an improved outcome for consumers <p>SONI received a significant increase in connection requests and successfully delivered beyond what was originally proposed in the Forward Work Plan. This accomplishment highlights SONI's dedication and efficiency in handling increased workload while maintaining high-quality delivery and SONI believes exceeds expectations.</p>
Stakeholder Engagement/Satisfaction	<p>SONI has remained dedicated to continuous engagement with clients regarding connection applications (FWP23-28). Through workshops and regular meetings, SONI actively demonstrates our commitment to ongoing collaboration. These interactions are pivotal for sharing insights, addressing concerns and ensuring a transparent and interactive process.</p> <p>Over the 2022/23 period and the progression of the Low Carbon Inertia Services (LCIS, FWP001), SONI has conducted extensive engagement with relevant key stakeholders throughout the year to ensure there is sufficient feedback from industry to progress this project.</p> <p>This demonstrates how SONI has met expectations regarding this area.</p>
Adaptability	<p>SONI demonstrated our adaptability during a period of increased connection applications (FWP23-28). This year saw a huge increase in the volume of applications coming through the team (20 in the year as opposed to normal average volumes of 4 – 5 per year).</p> <p>SONI has worked on a range of initiatives to speed delivery and ensure accuracy and consistency as well as provide stronger controls in a higher volume environment:</p> <ul style="list-style-type: none"> • Review of and changes to the controls around connections queue database and its impact on system studies. • Utilise a more templated approach to standardise these system studies. • Creation of Bay tracker to aid in pre application clinics. • Build out of a project pricing database to speed delivery and improve consistency. • Revisions to elements of project management tools to reflect larger volumes.

- Changes to timing of and content of intra team meetings to better and identify potential issues at an early stage.

In addition, as it is difficult to estimate the number of applications SONI will receive, the connections team had a much bigger workload than planned for. The team showed great commitment in issuing all connection offers and often worked far beyond core hours to ensure a professional and timely delivery.

Despite an initial delay in the first SEMC decision on LCIS (FWP001) requirements, SONI adeptly adjusted our original plans. To maintain momentum for this project, we initiated the PQQ process before the final decision, this required additional internal and external resources.

This approach enabled SONI to adhere to a revised ambitious timeline which demonstrates our commitment to deliver exceptional results despite evolving circumstances.

As a result, SONI considers that it has **met expectations** in this area.