



SONI Annual Performance Report 2023-24

Appendix 2
Independent Expert

Northern Ireland
December 2024



Role 2 Independent Expert Assessment Criteria

SONI's performance will be assessed by an independent panel and the UR on the following criteria:

ASSESSMENT CRITERIA

01

DELIVERY

The extent to which SONI deliver against:
(a) the specified deliverables and/or performance commitments from its Forward Work 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 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 adaption

For consistency and based on the advice contained in the UR's Evaluative Performance Framework Guidance document, we have applied the above criteria to the SONI Performance Report.

Cost Scale

SONI have created a Cost Scale in order to assist the audience in understanding the scale and/or importance of a project, and detailed where on this scale each project lies. The costs indicated are SONI related costs and do not cover any costs accrued by any stakeholder SONI may be collaborating with on said project.

This scale applied is detailed in the table below, the gauge icon will be used in the detailed project information for each deliverable.

LOW	£0-£500K
MEDIUM	£500K-£1M
HIGH	£1M-£5M
VERY HIGH	£5M+

Cost Scale Table



Cost Scale Gauge

Key Areas of Focus

In the 2023/24 Forward Work Plan, SONI highlighted our key areas of focus for the period, which include strategic projects that SONI deems to be of utmost importance for both SONI and Northern Ireland consumers. These projects are highlighted throughout this document and delivery of these areas of work is summarised below.



FWP24-02: Stakeholder Management Strategy

FWP24-03: Review & Publish an Enhanced Public Engagement Process for Network Infrastructure

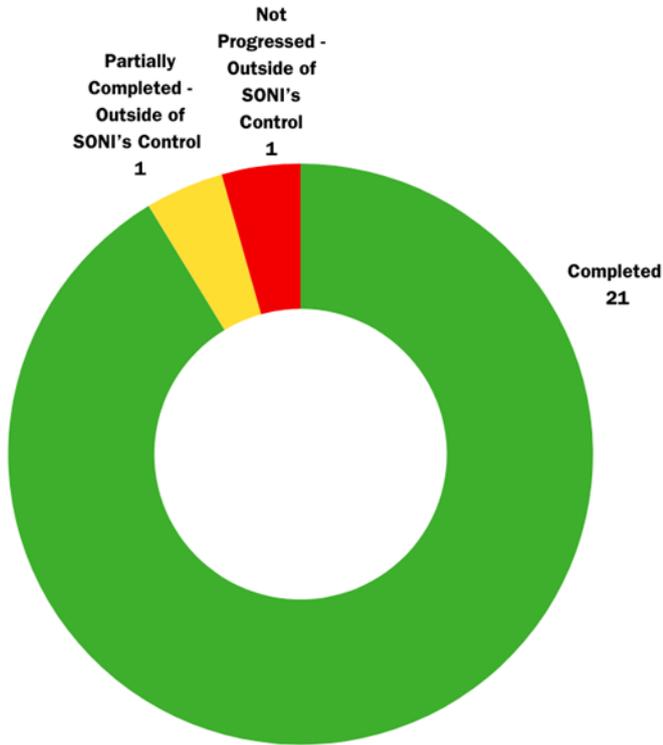
FWP24-04: SONI Price Control 2025+

FWP24-05: Tomorrows Energy Scenario

FWP23-14: Support the NI Energy Strategy

SONI Governance

Summary of Role 2 Deliverables



23 Milestones:

- 21 Completed
- 1 partially completed - **Outside of SONI's control**
- 1 Not progressed - **Outside of SONI's Control**

Project	Milestone	Status
FWP24-03 : Stakeholder Management Strategy	Development	
	Governance/Review	
	Publication	
FWP24-04: Review and Publish an Enhanced Public Engagement Process for Network Infrastructure	Development	
	Governance/Review	
	Publication	
FWP23-14: Support the NI Energy Strategy	Continue to support DfE via Annual action plan and established working groups	
	Continue to support DfE on its Offshore Ambitions.	
	Participate and respond to UR/DfE consultation on NI Connections Policy.	
	Review DfE Action plan for 2024 and identify areas where SONI can support	

FWP019 : Annual Innovation Report	Timely publication of the Annual Innovation Report and stakeholder engagement to inform which projects should progress to UR funding request.	
FWP23-15: SONI Mid-Year Performance Review	Mid-Year Update on SONI's 2023-2024 Performance	
	Mid-Year Update Workshop	
FWP022 Publish SONI's 2024/25 Forward Work Plan	Publication of SONI's Forward Work Plan for 2024-2025	
FWP021 : Balancing Market Principles Statement	Update and consult on version 8 of the Balancing Market Principles Statement	
FWP23-22 : Security of Supply Publications	Publication of materials associated with Security of Supply – All Island Generation Capacity Statement and Winter Outlook	
FWP23-23: SONI TSO – DSO Operating Model	Develop documents for model proposals and Flex trial.	
	Update the operating model proposals following lessons learned from Flex trial.	
FWP24-05: SONI Price Control 2025+	Engagement with UR and response to Approach Consultation.	
	Preparation of 5-year strategy for SONI..	
	Wide Stakeholder engagement on SONI Strategy.	
FWP24-06: Tomorrows Energy Scenario Northern Ireland (TESNI)	TESNI Consultation.	
	Publication of final TESNI 2023 report.	

Detailed Programme of Deliverables

FWP24-02: Stakeholder Management Strategy

Description of Activities

Develop and a publish a Stakeholder Engagement Strategy and evaluation framework.

Following the completion of the Stakeholder Needs Assessment in 2023/24, SONI commenced a project to develop the organisation's first public Stakeholder Engagement Strategy. SONI's Stakeholder Engagement Strategy 2024-26¹ was published in June 2024, an annual Stakeholder Action Plan for 2023/24², and two supplementary engagement Strategies in the form of a new Public Engagement Model and refreshed Landowner Charter.

The Stakeholder Engagement Strategy was developed following a process of desk-based research of other similar strategies from network operators and utilities.

The Stakeholder Engagement Strategy sets out:

- ❑ A strategic stakeholder map
- ❑ A series of strategic engagement themes
- ❑ New principles for engagement
- ❑ A new engagement approach
- ❑ An engagement toolbox
- ❑ A new delivery approach
- ❑ An Engagement Evaluation Framework.
- ❑ Our strategic approach and principles of stakeholder engagement in line with best practice.

Since publishing the Strategy, SONI has already published the first two Annual Action Plans, formed the internal Stakeholder Engagement Coordination Group and commenced a programme of capacity building training across the organisation.

¹ [SONI Stakeholder Engagement Strategy 2024-2026](#)

² [SONI Stakeholder Engagement Action Plan 2023-2024](#)

	The first Stakeholder Engagement Annual Pulse Survey was issued in September 2024 to cover activity that's taken place in the Stakeholder Action Plan 2023/24. The first Engagement Evaluation Framework Dashboard is set out in Appendix 6.
Delivery	<p>Position as of 30 September 2024</p> <ul style="list-style-type: none"> <input type="checkbox"/> Development—Complete <input type="checkbox"/> Governance/Review - Complete <input type="checkbox"/> Publication - Complete
Date Revision	This project experienced a short delay in delivery for an improved outcome for consumers. Despite having undertaken a significant stakeholder insights research exercise in 2023 through a comprehensive stakeholder needs assessment, we decided to undertake a further round of engagement and consultation that was not included in the initial project plan. This included a series of bilateral meetings with a smaller number of key partners, including organisations such as Renewable NI, the Northern Ireland Chamber of Commerce and the Consumer Council and a public consultation on our proposed approach.
Stakeholder Satisfaction/Engagement	<p>A significant programme of detailed stakeholder research was undertaken through the comprehensive stakeholder needs assessment in 2023, which included detailed one-to-one in-depth interviews with a range of stakeholders across society, industry and statutory stakeholders alongside a quantitative survey. This research engaged nearly 100 of SONI's key partners and stakeholders.</p> <p>In addition, to ensure the views of consumers meaningfully informed this Strategy, a public poll was undertaken with a representative sample of the Northern Ireland public (500 people) to understand their energy priorities, their priorities for SONI and their views on our engagement.</p> <p>In addition, to add to the findings of the Stakeholder Needs Assessment, SONI undertook a further round of deliberative engagement discussions with key partners including Renewable NI, the Northern Ireland Chamber of Commerce and the Consumer Council.</p> <p>Furthermore, SONI undertook a public consultation on its approach to the Stakeholder Engagement Strategy giving partners a further opportunity to input their views and priorities.</p>

However, the Stakeholder Engagement Pulse Survey 2023/24 found that:

- ❑ **96%** of stakeholders who responded to the survey said they were either Very Satisfied (60%) or Somewhat Satisfied (36%) with SONI’s engagement. No stakeholders said they were Dissatisfied or Very Dissatisfied.
- ❑ This is an improvement from the 2022/23 year where **86%** of stakeholders who responded to the survey said they were either Very Satisfied (36%) or Somewhat Satisfied (50%). There was also a reduction in the stakeholders who said were Somewhat Dissatisfied in 2022/23 from 14% to 0% in 2023/24.

In addition, SONI received the following qualitative feedback as part of the engagement and consultation process for this project giving partners a further opportunity to input their views and priorities.

“ [REDACTED] has had a positive experience engaging with SONI and welcomes the increased levels of interaction and collaboration throughout 2023 and in the first quarter of 2024... [REDACTED] has noted a strong willingness on behalf of SONI to increase the frequency of engagement work it conducts with the renewable electricity industry, both at a Committee and Board level, but also at a wider membership level. SONI has hosted in-person briefings on specific strategic issues, including the Transmission Development Plan for Northern Ireland (TDPNI) and, going forward, we know is willing to host further in-person sessions which allow for general updates on a range of workstreams across SONI and afford [REDACTED] members the chance to engage directly with the senior leadership team.” – Industry Representative Body

“The [REDACTED] have seen signs recently that SONI are making positive steps at engaging with stakeholders.” Organisation working with consumers

“ [REDACTED] is pleased to have a good working relationship with SONI. As the representative association for the local councils, we have been able to have a number of productive discussions on key issues.” – Statutory partner working with local government

More detailed stakeholder satisfaction information can be found in the Engagement Evaluation Framework Dashboard in Appendix 6. **Note, the evaluation note for this project (FWP24-02) should be read in conjunction with the Engagement Evaluation Framework dashboard.**

<p>Adaptability</p>	<p>From the perspective of the oversight and coordination of strategic engagement in SONI, our organisation has a small amount of resource available to support this workstream on an ongoing basis. Since the allocation of our last Opex Price Control allowance, the engagement requirements and expectations on SONI have, understandably, increased significantly.</p> <p>The recommendations made by the Independent Panel through the Evaluative Performance Framework since its beginning, while important, valid and very worthwhile, have entailed significant additional capacity needs. At present, SONI has the equivalent of 1 FTE to work on strategic engagement. This is made up of a number of different roles contributing resource to this important workstream. In this context, given the scale of stakeholder engagement that takes place across SONI on a daily basis and across every team, the successful delivery of this project has required an innovative approach.</p> <p>Recognising the scale of engagement that takes place across every team, SONI has deployed a “hub and spoke”/decentralised model, noting that a centralised approach would not be possible with the existing resources.</p> <p>This has involved standing up a Stakeholder Engagement Coordination Group, with representatives from each team across the business with external engagement responsibilities. While the strategic approach and coordination of engagement is driven centrally, including the development of this Strategy, this model enables capacity building across the whole organisation with each team contributing to the Strategy and Action Plans while also taking responsibility for delivery and driving quality and standards of engagement at a working team level.</p> <p>While SONI has always undertaken a significant amount of engagement, this new model of delivery has required the upskilling of people and teams across the organisation, recognising that many teams will have had no formal training in the area of engagement given their career and educational background e.g. engineering.</p>
<p>Cost Scale</p>	

<p>Description of Activities</p>	<p>SONI has a well-established three-part process for public engagement when it comes to network infrastructure projects.</p> <p>This process puts local communities, key stakeholders, and elected representatives at the heart of SONI’s infrastructure projects and already goes well above and beyond what is required by the statutory planning system process for pre-application community consultation.</p> <p>SONI has also been recognised by public participation experts as an organisation that has deployed pioneering new community engagement methods in a Northern Ireland context in recent years. For example, our Mid Antrim Citizen Sounding Board project was shortlisted for a Business in the Community Responsible Business Award in 2023.</p> <p>However, SONI has recognised the importance of meaningful community and landowner engagement in delivering our role to support Northern Ireland’s renewable energy ambitions.</p> <p>That’s why we have developed a delivered this project to publish a new Public Engagement Model and refreshed Landowner Charter.</p> <p>Both documents were published in June 2024 alongside SONI’s wider Stakeholder Engagement Strategy 2024-2026. They were developed and published following a significant programme of work and engagement which included:</p> <ul style="list-style-type: none"> ❑ A comprehensive Stakeholder Needs Assessment in 2023, which included consumer insights research with over 500 people. ❑ A body of desk-based research on local, national and international best practice. ❑ The appointment of an independent public participation expert partner to peer review and oversee the development of the models. ❑ Four roundtable events with a wider range of stakeholders, including civic society organisations, industry partners, the business community, rural community organisations and statutory consumer bodies; and, ❑ A public consultation on the proposed model.
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Delivery	Position as of 30 September 2024 <ul style="list-style-type: none"> <input type="checkbox"/> Development–Complete <input type="checkbox"/> Governance/Review - Complete <input type="checkbox"/> Publication - Complete
Date Revision	<p>This project experienced a short delay in delivery for an improved outcomes consumers. Despite having undertaken a significant stakeholder insights research exercise in 2023 through a comprehensive stakeholder needs assessment, we decided to undertake a further round of engagement and consultation that was not included in the initial project plan.</p> <p>This included a series of roundtable events and a public consultation on SONI’s proposals.</p>
Stakeholder Satisfaction/Engagement	<p>A significant programme of detailed stakeholder research was undertaken through the comprehensive stakeholder needs assessment in 2023, which included detailed one-to-one in-depth interviews with a range of stakeholders across society, industry and statutory stakeholders alongside a quantitative survey. This research engaged nearly 100 of SONI’s key partners and stakeholders.</p> <p>In addition, to ensure the views of consumers meaningfully informed this Strategy, a public poll was undertaken with a representative sample of the Northern Ireland public (500 people) to understand their energy priorities, their priorities for SONI and their views on our engagement.</p> <p>Furthermore, four roundtable events with a wider range of stakeholders, including civic society organisations, industry partners, the business community, rural community organisations and statutory consumer bodies.</p> <p>A public consultation was also undertaken on the proposed Public Engagement Model and Landowner Charter</p> <p>More detailed stakeholder satisfaction information can be found in the Engagement Evaluation Framework Dashboard in Appendix 6. <i>Note, the evaluation note for this project (FWP24-02) should be read in conjunction with the Engagement Evaluation Framework dashboard.</i></p>

	<p>However, the Stakeholder Engagement Pulse Survey 2023/24 found that:</p> <ul style="list-style-type: none"> ❑ 96% of stakeholders who responded to the survey said they were either Very Satisfied (60%) or Somewhat Satisfied (36%) with SONI’s engagement. No stakeholders said they were Dissatisfied or Very Dissatisfied. ❑ This is an improvement from the 2022/23 year where 86% of stakeholders who responded to the survey said they were either Very Satisfied (36%) or Somewhat Satisfied (50%). There was also a reduction in the stakeholders who said were Somewhat Dissatisfied in 2022/23 from 14% to 0% in 2023/24. <p>In addition, SONI received the following qualitative feedback as part of the engagement and consultation process for this project giving partners a further opportunity to input their views and priorities.</p> <p><i>“Before commenting further we want to focus on SONI’s significant effort and work in their Engagement Model and specifically their commitment to work with those who may be affected by any future grid development plans, ensuring affected local communities, including land owners, are at the heart of the energy transition. SONI have engaged with the [REDACTED] on their 3-Part Process for Grid Development process. What this means is a commitment to engage with local communities years before the submission of a planning application and thereby provide opportunities for their input.”</i></p> <p>Organisation representing rural communities</p> <p><i>“[REDACTED] commends SONI’s commitment to strengthening engagement and understanding the significance of this engagement in galvanising all key stakeholders to deliver a successful energy transition.”</i> Industry representative body</p>
	<p>Following a decision to undertake further consultation and engagement, the project team faced additional time and resource constraints to ensure this project was completed in as timely a fashion as possible.</p> <p>In line with our commitment to explore more deliberative forms of public participation, and to cultivate a deeper form of engagement, our team held a series of multi-partner workshops, ensuring each workshop had a mixture of organisations with differing perspectives to get more nuanced feedback.</p>

<p>Adaptability</p>	<p>In line with our commitment to explore more deliberative forms of public participation, and to cultivate a deeper form of engagement, our team held a series of multi-partner workshops, ensuring each workshop had a mixture of organisations with differing perspectives to get more nuanced feedback.</p> <p>We are acutely aware of the potential for consultation and engagement fatigue and so the workshops offered a resource-proportionate opportunity for stakeholder engagement for those partners who may not have been able to respond to the formal consultation.</p> <p>Furthermore, to ensure the best possible outcomes, we appointed independent public participation charity, Involve, to act as a “critical friend” to the project and provide feedback and oversight to ensure our proposals were in line with best practice standards.</p>
<p>Cost Scale</p>	

Description of Activities

SONI has and will continue to engage with the Department for the Economy (DfE) and other stakeholders to support the delivery of the 2022 and 2023 Energy Strategy Action Plans. This involves engagement in various working groups and regular engagement with the leads and teams within the DfE. This work will also involve regular engagement with the UR and NIE Networks as well as industry stakeholders. In addition, SONI plans to engage with and support DAERA on the Climate Change Act implementation. We are active participants in the Green Growth Forum. We expect this work to continue as DAERA progress its plans.

The key activities SONI plans to progress include:

- ❑ Maintain regular schedule of meetings between the relevant government departments and SONI on ongoing developments.
- ❑ Arrange briefings with relevant stakeholders on key SONI outputs (e.g., GCS, TESNI, etc.)
- ❑ Representation on relevant working groups and seek to align with planned work to ensure consistency and efficiencies.
- ❑ Partnership arrangement with NIE Networks – joint working to support DfE deliverables.

One key strategic area of engagement is in relation to Offshore. SONI has representation on both Offshore steering group and working groups established by DfE. SONI envisages the work we are undertaking in TESNI will act as a key input to the Offshore Renewable Energy Action Plan

DfE has recently established a working group to focus on the grid aspects of Offshore. SONI have allocated a number of technical and regulatory experts to support this group. The objective of this working group is to provide insight, advice and evidence into offshore transmission and strategic network planning matters to contribute towards policy/regulatory development. We anticipate the work we have completed in Shaping our Electricity Future, the ongoing connections applications we are progressing and the work on TDPNI and TESNI will allow us to bring independent expert advice to this forum and allow informed policy and regulatory decisions to be made. SONI will also continue to support DfE in its considerations in relation to RESS and Flexible systems.

Delivery	<p>Position as of 30 September 2024</p> <ul style="list-style-type: none"> ❑ Participate and respond to UR/DfE consultation on NI Connections Policy – Not Complete (Outside of SONI’s Control) ❑ Review DfE Action plan for 2024 and identify areas where SONI can support. - Complete ❑ Continue to support DfE via Annual action plan and established working groups. - Complete ❑ Continue to support DfE on its Offshore Ambitions and how TESNI can support this. - Complete
Date Revision	<p>SONI’s contributions to the NI Energy Strategy are closely aligned with the work plans set by the relevant government departments, enabling us to deliver on all possible inputs based on the information currently available.</p> <p>While we have met the majority of these deliverables, we are unable to respond to the consultation on NI Connections, as it has yet to be published. The UR published responses to the Call for Evidence in June 2024 and indicated that they would conduct a detailed analysis aiming to publish a joint consultation paper in July 2024. However, this publication is still pending.</p> <p>SONI’s role in shaping and advancing this strategy will continue for the foreseeable future, and we remain committed to supporting this essential work across all relevant workstreams.</p>
Stakeholder Satisfaction/Engagement	<p>Our contributions in inputting to the development of this strategy are delivered through various forums, where we collaborate as one of many engaged stakeholders. In these groups, we have shared our expertise while actively listening to diverse perspectives.</p> <p>SONI’s unique position at the centre of the electricity system in Northern Ireland, allows us to offer valuable insights, particularly through the results of our modelling and analysis, which we share to inform and enhance discussion.</p> <p>The recently established 80/30 Working group in early 2024, formed by the Department for Economy and attended by key industry stakeholder, has been particularly vital in driving meaningful conversation around achieving net zero targets and advancing the actions outlined in the NI Energy Strategy.</p>

<p>Adaptability</p>	<p>The government department workplans were not published until part way through the SONI Forward Work Plan year. We have been flexible within our planning & resourcing to ensure that we have been able to accommodate these externally driven timelines and have made staff available for this work despite conflicting priorities.</p> <p>The NI Energy Strategy Action plan was not published until late March 2024, which occurred partway through the Forward Work Plan year. In response, we have demonstrated flexibility in our planning and resourcing to accommodate these externally driven timelines. Despite facing conflicting priorities, we have ensured that our staff remain available to support this critical work. This adaptability reflects SONI's commitment to supporting delivery of the NI Energy Strategy.</p>
<p>Cost Scale</p>	

<p>Description of Activities</p>	<p>Preparation and Publication of the SONI Annual Innovation Report.</p> <p>As part of this annual innovation reporting process, we will seek to prepare and consult on our multi-year innovation programmes.</p> <p>The proposed strategic innovation programmes are SONI’s view of the crucial areas of innovation that need to be investigated to ensure we can respond effectively to the challenges ahead.</p> <p>SONI plans for the Annual Innovation Report to be published in February 2024, with a consultation to be open for feedback from February 2024 to March 2024. SONI will then consider all responses provided and use this feedback to inform our decision-making process on which projects stakeholders consider bringing the most benefit to the transmission system and grid security.</p> <p>A final version of the Annual Innovation Report will then be published by April 2024.</p> <p>In preparation of this work, SONI will continue to work closely with key stakeholders such as NIE Networks on knowledge sharing as well as engagement with academia.</p>
<p>Delivery</p>	<p>Position as of 30 September 2023: Complete</p>
<p>Date Revision</p>	<p>The report underwent a comprehensive consultation process from 7th February 2024 to 6th March 2024, during which we actively sought feedback from consultants and stakeholders. We carefully considered all responses, and we sought the opinion of internal SMEs when addressing relevant responses related to their field of expertise.</p> <p>The final version of the report was shared with the Regulatory Authorities by the planned April deadline, as originally scheduled. However, following this submission, the regulator requested additional information to further enhance the reports completeness and accuracy. In response we promptly gathered and integrated the requested details, updating the report accordingly. This version update was shared before the reports final publication in July 2024</p>

Stakeholder Satisfaction/Engagement	<p>On the 7th of February 2024, EirGrid and SONI published the Annual Innovation Report for consultation. This consultation utilised the new consultation portal, and for transparency, the full submissions are available for viewing on the respective portals. There was a total of four responses to the consultation, three through the EirGrid portal, one through the SONI portal. One of the respondents did not permit the sharing of their name. However, the other three respondents are listed below:</p> <ul style="list-style-type: none"> ❑ Wind Energy Ireland, ❑ EDF Renewables, and ❑ Northern Ireland Electricity Networks <p>Consultants viewed the content of the Annual Innovation Report positively and were largely supportive of the proposed focuses. Only minor changes were required to the initial report based on these responses.</p>
Adaptability	<p>The team allocated the necessary resources to thoroughly review the feedback, and the consultation response was prepared as planned. We carefully documented the feedback from the Regulatory Authorities ensuring that the requested additional information was incorporated into the report. The team adapted quickly to these requirements, efficiently gathering and including the necessary data for the final report. The 2023 Annual Innovation Report received only minor review points from external consultants, advising SME’s and group regulation, indicating the report was largely aligned with expectations and can be considered a success.</p>
Cost Scale	

FWP23-15: SONI Mid-Year Performance Review

Description of Activities	<p>Publication of a Mid-Year Performance Review and Industry Workshop</p> <p>As part of the Evaluative Performance Process, SONI will be providing a mid-year update on the deliverables which are detailed within this Forward Work Plan for 2023-2024. This will involve a publication which will detail the progress made to date on each project, what has been achieved and what is to be achieved by September 2024.</p> <p>SONI will also hold an industry workshop to present our mid-year update to stakeholders and be available for questions from stakeholders on our achievements to date and planned deliverables over the second half of the period.</p>
Delivery	<p>Position as of 30 September 2024</p> <ul style="list-style-type: none"> <input type="checkbox"/> Publication of Mid-Year Update - Complete <input type="checkbox"/> Mid-Year Update Workshop - Complete.
Date Revision	<p>The Mid-Year Performance Report was published on 30th April 2024 and SONI invited customers and stakeholders to attend a virtual workshop 8th May 2024</p>
Stakeholder Satisfaction/Engagement	<p>SONI presented to a broad audience across the industry, ensuring a diverse and representative group of stakeholders. Including the following attendees:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Utility Regulator <input type="checkbox"/> Evaluative Performance Framework Independent Expert Panel <input type="checkbox"/> Department for the Economy <input type="checkbox"/> NIE Networks <input type="checkbox"/> ESB <input type="checkbox"/> VIOTAS <input type="checkbox"/> Consumer Council <p>During the stakeholder event, we provided a comprehensive progress update on all projects included in the plan, facilitating an open and informative session. We also presented on our stakeholder engagement plans. The feedback received after the event was positive, highlighting the value stakeholders found in our transparent communication and responsiveness through this process.</p>

Adaptability	<p>Following last year’s report, the first of its kind within the Evaluative Performance Cycle, we identified opportunities to refine information presented, allowed us to make targeted adjustments that enhance clarity and relevant. These adaptations reflect our commitment to continuous improvement, ensuring that valuable insights and learnings are incorporated into next year’s mid-year and annual performance reports. Completing this report still requires considerable effort across the business, as the process remains a work in progress. However each cycle of the EPF strengthens our approach, supporting an evolving and increasingly effective reporting process that meets stakeholder needs and expectations.</p>
Cost Scale	

FWP022: Publish SONI's 2024/25 Forward Work Plan

Description of Activities	<p>During the period, SONI will be progressing our implementation of the Evaluative Performance Framework (EPF). This will include following the processes involved in a standard year of the EPF as per the guidance issued by the UR. A key milestone will be the publication of our annual Forward Work Plan for the period 2024 – 2025 which will be targeted for the end of September 2024.</p> <p>Over the period SONI will be monitoring the progress of the 2023 – 2024 plan. In early 2025, SONI will receive feedback from the UR and Independent Panel on our plan for the period. The UR will also invite stakeholders to provide submissions on the 2023 – 2024 plan following its publication. These opportunities for feedback will be significant to SONI in considering its preparation for our 2024 – 2025 Forward Work Plan.</p>
Delivery	Position as of 30 September 2024: Complete
Date Revision	N/A
Stakeholder Satisfaction/Engagement	SONI published the Forward Work Plan on 26th September 2024. Following the URs six-week consultation period, SONI presented at a stakeholder event hosted by the UR on 13th November 2024. Responses received during the consultation period have been reviewed and consideration has been given to any recommendations.
Adaptability	The Evaluative Performance Frameworks requirement for continuous improvement has driven us to enhance our approach, ensuring that each iteration of the plan better aligns with stakeholder needs and expectations. In developing the Forward Work Plan 2024/25, we revised the reports design and presentation, incorporating distinct colours for the main report and appendices across the four roles to improve clarity and ease of use for stakeholders. While producing this report remains a substantial effort across the business, the framework is fully embedded within the business, supported by robust reporting processes across all areas. These adaptations reflect our commitment to continuous improvement and responsive stakeholder centred approach.
Cost Scale	

FWP021: Balancing Market Principles Statement

Description of Activities	<p>Consulting upon Balancing Market Principles Statement (BMPS) V7.1</p> <p>An important business improvement activity is the enhancement of the Balancing Market Principles Statement (“BMPS”). SONI will shortly begin the review process of the BMPS, which will then be consulted on with industry, stakeholders, and the UR. SONI will then be responsive to feedback and prepare a final version for publication.</p> <p>The intention is that the Balancing Market Principles Statement is informative and comprehensive, and that it is striking a balance between detail on the technical complexity of the scheduling and dispatch process and accessibility for informed industry participants.</p> <p>This will take place over the period 2023-2024, with the final version BPMS V7.1 due to be published by June 2024.</p>
Delivery	Position as of 30 September 2024: Complete
Date Revision	N/A
Stakeholder Satisfaction/Engagement	As part of our stakeholder engagement for the Balancing Market Principles Statement we invited market participants to provide feedback with the consultation on revisions to the statement published on 20th May 2024. The engagement yielded only one response during the consultation period. Additionally, we collaborated with Regulatory Authorities to secure final endorsement of the updated Balancing Market Principles Statement and the response we provided to the comments from market participant. This collaborative approach underscores our commitment to transparency and responsiveness in our engagement with stakeholders.
Adaptability	SONI adhere to a structured process that allows us to effectively manage feedback within a tight timeframe. Following the consultation, we had a seven-day window to address any comments received, ensuring that we remain responsive and adaptable to stakeholder input.
Cost Scale	

<p>Description of Activities</p>	<p>Over the period SONI will make a number of publications which can be captured under Security of Supply. These include:</p> <p>All Island Generation Capacity Statement</p> <p>SONI is required to produce an annual Generation Capacity Statement (“GCS”), in accordance with Condition 35 of the TSO Licence. The development, planning and connection of new generation capacity to the transmission or distribution systems can involve long lead times and high capital investment.</p> <p>Consequently, this report provides information covering a ten-year timeframe. The main purpose of the GCS is to inform market participants, regulatory agencies and policy makers of the likely minimum generation capacity required to achieve an adequate supply and demand balance for electricity for the next decade. SONI will be publishing the next GCS for the period 2024-2033 prior to Autumn 2024, subject to Regulatory Approval from UR.</p> <p>Winter Outlook</p> <p>The Winter Outlook presents a more detailed view focusing on the upcoming winter in Northern Ireland. This document is published annually in October and helps inform the electricity industry and supports preparation for the coming months. We study the expected generation capacity and the forecast demand to determine if there is adequate generation capacity margin. Security of Supply is a significant priority for SONI, and we continue to engage with the UR and DfE over the period to ensure the continuity of a safe, secure and reliable Transmission System.</p>
<p>Delivery</p>	<p>Position as of 30 September 2024:</p> <p>All Island Generation Capacity Statement – In progress.</p> <p>Winter Outlook – Complete</p> <p>We are not yet in a position to publish the Generation Capacity Statement due to issues Outside of SONI’s control. The introduction of a new methodology, which is currently with the Utility Regulator for approval, has delayed the publication. We are closely monitoring the situation and will publish the statement as soon as the necessary approvals are secured.</p>

Date Revision	All Island Generation Capacity Statement: Awaiting approval of the NRAA Methodology before the GCS can be published
Stakeholder Satisfaction/Engagement	<p>Winter Outlook:</p> <p>There were a number of briefings done to key stakeholders ahead of publication – DfE and UR were kept informed of Winter Outlook up to publication, but we also attended briefings alongside NIE Networks to NI Councils, Manufacturing NI, NI Local Government Association, NI Business Alliance. Really positive feedback was received throughout these engagements. SONI has been working throughout this year to proactively communicate the issues arising around security of supply with the UR and DfE and to ensure that our work in this area is coordinated and consumer focused.</p> <p>All Island Generation Capacity Statement:</p> <p>Due to the delay with the approval of the NRAA methodology, we have been unable to publish the GCS as planned. Engagement with the Regulatory Authorities is ongoing, and we will continue to work closely with them until the methodology is approved. Once approval is secured, we will begin the process of completing the GCS for publication. In parallel ongoing engagement with EirGrid and the DfE will commence and soon as we have approval to proceed.</p>
Adaptability	<p>Winter Outlook:</p> <p>Wider response to ongoing issues:</p> <p>SONI continues to deliver considerable additional value in our role as trusted advisor to DfE and UR around Security of Supply. SONI regularly engage with DfE and UR regarding Security of Supply to ensure known risks are monitored and to assist them in their statutory roles. Early this year, SONI undertook a feasibility assessment for Temporary Generation in Northern Ireland.</p> <p>All Island Generation Capacity Statement:</p> <p>While we have not been able to proceed as planned due to the pending approval of the NRAA Methodology, we remain prepared to respond promptly once approval is granted. Senior staff will be made available to support discussions with the UR on the GCS, ensuring that any outstanding issues or concerns are addressed efficiently. This will enable a quick turnaround to finalise and publish the statement without further delay.</p>

Cost Scale



<p>Description of Activities</p>	<p>Implementation plan for TSO/DSO operating model.</p> <p>The aim of the project is to ensure that SONI and NIE Networks are working together in a collaborative and effective manner to jointly address electricity system and customer needs, and to deliver whole-of-system solutions to deliver on the Government’s policy ambitions.</p> <p>SONI and NIE Networks are working together and have developed a TSO-DSO joint programme of work. Development of the enduring TSO-DSO Operating Model is a key focus.</p> <p>The key deliverable over the 2023/2024 period will be to develop a high-level implementation plan for TSO-DSO Future Operating Model for Northern Ireland</p> <p>As part of that plan, activities over 2023/2024 will include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develop documents to summarise the model proposals and outline protocols in more detail. <input type="checkbox"/> Develop a document to summarise the Flex trial intentions and communicate with participants. <input type="checkbox"/> Update the operating model proposals following lessons learned from the Flex trial
<p>Delivery</p>	<p>Position as of 30 September 2024:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develop documents for model proposals and Flex trial – Complete <input type="checkbox"/> Update the operating model proposals following lessons learned from Flex trial – Complete
<p>Date Revision</p>	<p>N/A</p>
<p>Satisfaction/Engagement</p>	<p>We have engaged extensively with NIE Networks during the development of the TSO-DSO Operating model vision and principles, fostering a collaboratively and inclusive approach. This process included a series of dedicated workshops attended by subject matter experts and senior management, ensuring that a wide range of perspectives and expertise informed the outcomes. In addition to these workshops, numerous follow-up calls and meetings were held to address specific issues, refine key details, and document the agreed outcomes. This through and iterative process underscores our commitment to developing a robust and well-aligned operating model ensuring clarity, consensus, and a strong foundation for implementation.</p>

<p>Adaptability</p>	<p>SONI collaboratively agreed on a number of pragmatic approaches with NIE Networks to deliver the outputs for this project. These approaches acknowledge the need for flexibility in certain areas while maintaining focus on the projects strategic objectives. We recognised that simplified approaches to the operating model could be acceptable under specific assumptions, particularly in early stages such as trials. This allowed us to progress without unnecessary delays, while also identifying areas that would require more through consideration under different assumptions or to ensure the robustness of end-to-end processes.</p> <p>Furthermore, we agreed to prioritise discussions on high-level vision and principles at this stage, deferring detailed design considerations to later phases. This staged approach ensured that immediate priorities were addressed while leaving room for more, granular analysis and adjustments during the detailed design phase. By balancing simplification were appropriate with a clear roadmap for future refinements, we effectively navigated complex challenges and kept the project on track.</p>
<p>Cost Scale</p>	

<p>Description of Activities</p>	<p>Price controls are used by regulatory authorities, such as the Utility Regulator, to set the amount of money available to companies like SONI over a particular period of time, in this case five years.</p> <p>The UR recently published its decision to defer the next SONI Price Control by 1 year. This paper included an indicative timetable – the activities scheduled for the assessment year includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Approach Consultation - Initial Planning January - February 2024 <input type="checkbox"/> Final Approach Published end of March 2024 <input type="checkbox"/> Information Requirements Published end of March 2024 <p>In addition, it is expected that the UR will also consult on the allowances for the one-year extension to the existing price control in this time period.</p> <p>Whilst the timetable presented by the UR is indicative, SONI plans to progress the following activities in preparation of the price control. These are subject to change depending on any decisions taken by the new SONI Board.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Engagement with UR and response to Approach Consultation <input type="checkbox"/> Preparation of 5-year strategy for SONI. <input type="checkbox"/> Wide Stakeholder engagement on SONI Strategy. model proposals following lessons learned from the Flex trial
<p>Delivery</p>	<p>Position as of 30 September 2024:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Engagement with UR and response to Approach Consultation: Complete <input type="checkbox"/> Preparation of 5-year strategy for SONI: Complete <input type="checkbox"/> Wide Stakeholder engagement on SONI Strategy: Complete
<p>Date Revision</p>	<p>N/A</p>
<p>Satisfaction/Engagement</p>	<p>Stakeholder engagement is a critical component of our work on SRP26 and SONI’s 5-year strategy. We have established a Stakeholder Advisory Challenge Group that includes key industry stakeholders. Since its formation in Spring 2024, we have convened monthly meetings, having met four times to date. Initially focused on our Strategy and price control, this group will continue to meet to ensure we effectively address the needs and concerns of stakeholders as we transition towards net zero.</p>

	<p>The insights gathered from this forum have been invaluable in shaping our new five-year company strategy,</p> <p>In June 2024, we hosted an event in collaboration with Renewables NI, where each SONI department presented their specific remit and how it relates to the new price control. The feedback from this event was overwhelmingly positive, as it provided an opportunity for attendees to ask key questions tailored to their interests in each area. Additionally we issued a survey in June to gather insights on our 5-year strategy from both staff and external stakeholders. The responses received were highly informative and played a crucial role in shaping the formation of our draft 5-year strategy. The 5-year draft strategy was published for consultation in September 2024. This engagement underscores SONI’s commitment to fostering an inclusive dialogue with stakeholders and ensuring their perspectives are integrated into our planning approach.</p> <p>Additionally, this engagement is essential for keeping industry updated on our approach to SONI’s new price control. Throughout the year, we have maintained ongoing engagement with industry stakeholders through various channels, including bilateral meetings, and industry forums, further supporting our plans for the business plan submission for SONI’s next price control.</p>
Adaptability	<p>SONI have significantly increased our engagement with industry stakeholders to ensure that all feedback is acknowledged and considered. SONI consider that by actively seeking input from a diverse range of participants, we can better understand the dynamic landscape in which we operate and respond efficiently to emerging challenges and opportunities. SONI believe that this reinforces our commitments to remain adaptable in our approach to the price control but also ensures that our new strategy is aligned with industry needs and expectations, allowing us to make informed decisions that supports sustainable growth and compliance with regulatory requirements.</p>
Cost Scale	

FWP24-06: Tomorrow's Energy Scenario Northern Ireland (TESNI)

Description of Activities	<p>SONI is responsible for a safe, secure and reliable electricity transmission system, now and in the future – we must accommodate existing and future energy demands. Shaping Our Electricity Future included extensive stakeholder engagement to understand the electricity system investments required to address decarbonisation and energy security needs up to 2030. Looking out beyond 2030, Tomorrow's Energy Scenarios 2023 will outline a range of credible pathways for Northern Ireland's clean energy transition, with specific focus on what this means for the electricity transmission system from 2030 to 2050.</p> <p>TESNI must be done in a way that tends towards our decarbonisation goals for Northern Ireland (informed by the sixth Carbon budget and the Climate Act 2022). Following significant changes in energy and climate policy, we have adopted a new approach for TES 2023 scenarios and analysis. Scenarios represent various approaches and speed of decarbonisation.</p> <p>Following a period of model development and pre-consultation engagement in 2023, SONI will:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Commence a consultation - planned to commence in October for 4-6 weeks. <input type="checkbox"/> Consultation report to be available on the SONI website and shared directly with targeted stakeholders. <input type="checkbox"/> Briefings on findings to be offered to target stakeholder groups – government, industry, and academia. <input type="checkbox"/> Following consultation, review and update of analysis and final TES 2023 report
Delivery	<p>Position as of 30 September 2024:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Publication of TES Consultation. - Complete <input type="checkbox"/> Publication of final TESNI 2023 report. - Complete
Date Revision	<p>Delivery of TES 2023 was delayed to allow for an improved outcome for consumers. This provided us more time to engage with stakeholders and take on board a wide range of feedback to improve our assumptions and modelling of very complex scenarios.</p>

	<p>Engagement at an early stage was a critical component in the development of the TES report. We conducted pre-consultation engagement with key stakeholders to gather initial insights and ensure their perspectives were reflected in the process. Stakeholder feedback received during these early engagements played a pivotal role in shaping the final consultation report, helping us to align it with stakeholder expectations and priorities.</p> <p>To evaluate the effectiveness of this pre-consultation phase, we assessed stakeholder satisfaction based on the level of engagement interest, and quality of feedback provided. Following the formal consultation period in November 2023, we collected and analysed stakeholder responses, using this input to refine and amend the proposed scenarios where necessary.</p> <p>Between March and May 2024, we conducted further targeted engagement with stakeholders to discuss the updated proposals and ensure alignment ahead of publication. Satisfaction levels during this stage were also assessed based on the depth of engagement and the value of feedback received. Notably, some stakeholders responded particularly positively to our efforts, inviting us to present our findings more broadly within their organisations, demonstrating the value they placed on our engagement process.</p>
Adaptability	<p>The development of TES was built upon the foundations of preceding analysis and reports for Shaping Our Electricity Future and TESNI 2020. It has been informed by evolving and published policy across Northern Ireland, Great Britain, Ireland and Europe, ensuring that it reflects both regional and international energy priorities. Recognising the strategic importance of this project, we actively responded to stakeholder feedback, integrating it into your delivery plans alongside other critical projects to ensure alignment with expectations and objectives.</p> <p>Throughout the development process, adaptability was a key principle. This involved achieving stakeholder alignment on the report’s scope and approach, as well as producing a robust scenario framework that informed modelling and assessment of electricity demand and generation. The process also required conducting concurrent and integrated analysis for Northern Ireland and Ireland, ensuring coherence and alignment across jurisdictions</p>

	<p>We engaged extensively with stakeholder both before and after the consultation period, addressing feedback at every stage where appropriate. This iterative process was instrumental in refining the report and ensuring it met stakeholder needs while remaining adaptable to the evolving energy landscape demonstrating the value they placed on our engagement process.</p>
Cost Scale	