

SONI Forward Work Plan

2022 – 23

Appendix 2 SONI Deliverables 2022-2023

Role 2 Independent Expert

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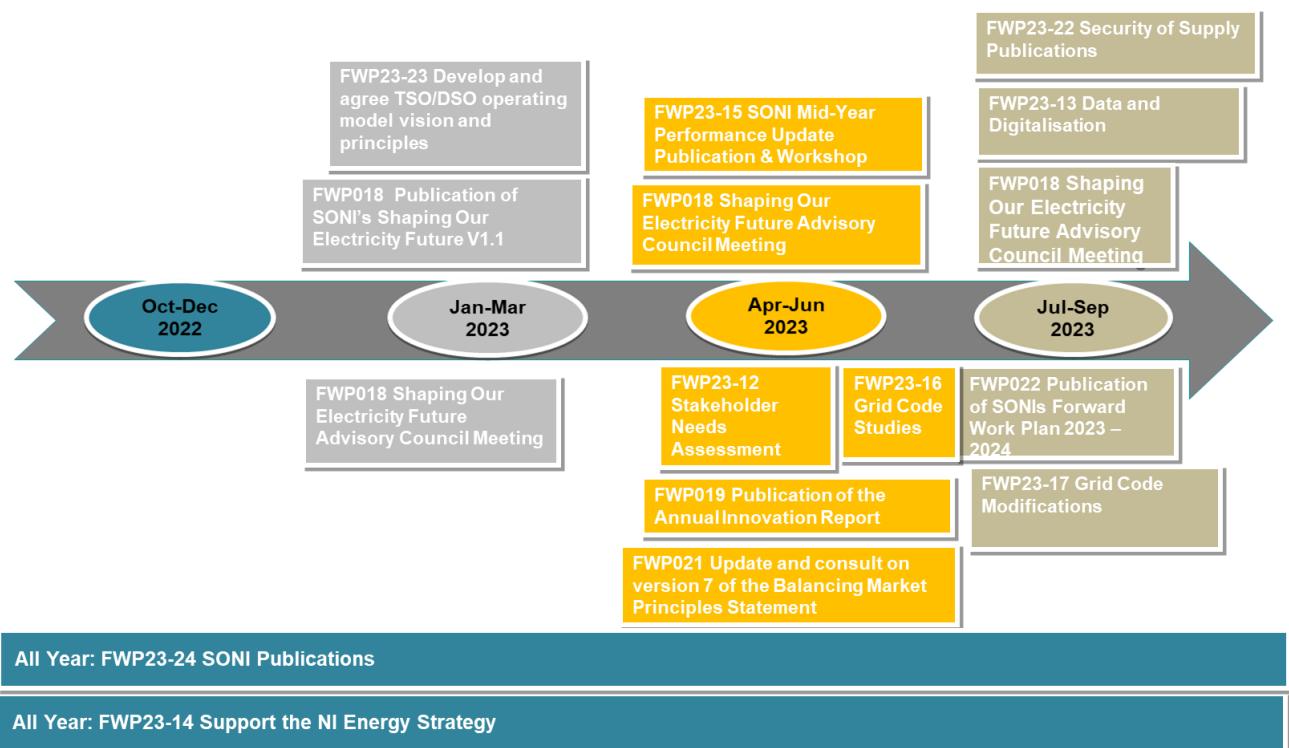
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SONI Deliverables 2022-2023 – Role 2 Independent Expert

The SONI Forward Work Plan provides details on the various projects and programmes of work that will be undertaken over the period from October 2022 to September 2023. This appendix document provides further detail on those deliverables associated with Role 2 Independent Expert and should be read in conjunction with the main document.

Overview of the projects

The table below provides a holistic view of the projects being undertaken across Role 2 Independent Expert. Additional detail is provided around these deliverables throughout the document.



Project	Milestone	Performance Measure	Timescale
FWP018 Shaping Our Electricity Future V1.1	Publication of Version 1.1 of Shaping Our Electricity Future Continuous Engagement during the period	Stakeholder Engagement and the timely publication of the Shaping Our Electricity Future V1.1 Stakeholder Engagement	February 2023 January 2023,

		and the timely achievement of workshops and advisory council meetings.	May 2023, September 2023 and Throughout 2022-2023
FWP23-12 Stakeholder Needs Assessment	Stakeholder Needs Assessment Development of a Stakeholder Engagement KPI	Stakeholder Engagement and the timely provision of the stakeholder needs assessment.	June 2023
FWP23-13 Data & Digitalisation	Agree Open Data Sharing with NIE Networks	Successful achievement of deliverable	September 2023
FWP23-14 Support the NI Energy Strategy	Support 5 identified actions in DfE's Path to Net Zero Action Plan Active participation in relevant Working Groups associated with Energy Strategy	This programme of work will be monitored throughout the period	Throughout 2022-2023
FWP019 Annual Innovation Report	Publication of the Annual Innovation Report	Timely publication of the Annual Innovation Report and stakeholder engagement to inform which projects should progress to UR funding request.	April 2023
FWP23-15 SONI Mid-Year Performance Review	Mid-Year Update on SONI's 2022-2023 Performance Mid-Year Update Workshop	Successful SONI Mid-Year Review Workshop	April 2023 May 2023
FWP022 Publish SONI's 2023/24 Forward Work Plan	Publication of SONI's Forward Work Plan for 2023-2024	The timely publication of the SONI Forward Work Plan	September 2023

FWP021 Balancing Market Principles Statement	Update and consult on version 7 of the Balancing Market Principles Statement	Timely consultation process, feedback will be assessed on quality and quantity and the timely provision of the document to the UR for approval.	June 2023
FWP23-16 Grid Code Studies	Providing outcome of the studies considering minimum generation parameters for Grid Code to Grid Code Review Panel and UR	Timely provision of the outcome to Grid Code Review Panel and the UR	April 2023
FWP23-17 Grid Code Modifications	Battery Grid Code Modifications RoCoF Modifications	Modification process followed for three sets of changes, stakeholder views considered and proposals submitted to UR	September 2023
FWP23-22 Security of Supply Publications	Publication of materials associated with Security of Supply – All Island Generation Capacity Statement and Winter Outlook	Timely publications of material	September 2023
FWP23-23 SONI TSO – DSO Operating Model	Develop and agree the TSO – DSO operating model vision and principles	Achievement of an agreed Vision and Principles for the TSO-DSO Operating Model	March 2023
FWP23-24 SONI Publications	SONI Publications over the period to include the All-Island Transmission System Performance Report and the Annual Renewable Energy Curtailment and Constraint Report.	Timely publication of accurate information and assessment of feedback received	Ongoing throughout 2022 – 2023 and as indicated May 2023 and August 2023

Role 2: Detailed Programme of Deliverables

Shaping Our Electricity Future Version 1.1 and Associated Engagement Activities

Deliverable	FWP018: Shaping Our Electricity Future Version 1.1 and Associated Engagement Activities
Description of Activities	<p>SONI published its Shaping Our Electricity Future Roadmap at the end of 2021. Since this publication, there have been changes to government policy in Northern Ireland.</p> <p>In Northern Ireland, the Climate Change Act (Northern Ireland) 2022 has set an 80% RES-E target by 2030. As a result, we consider it appropriate to review and update the Shaping Our Electricity Future Roadmap before the end of 2022 in response to these policy changes. We intend to publish this updated version "Shaping Our Electricity Future V1.1" in February 2023.</p>  <p>On 22 July 2022 SONI published its Shaping Our Electricity Future V1.1 – Call for Inputs¹. This call for inputs was held for a period of 6 weeks to be used to gather views from stakeholders on what should be considered in the update.</p> <p>SONI also hosted an industry focused webinar which took place on 11 August 2022. This was held while the call for inputs remained open as this type of forum can be used not only for SONI to gather feedback on stakeholder views, but for stakeholders to inform each other of their views and this may encourage a more detailed response from stakeholders. Through this event² we were able to engage directly with stakeholders, identify what themes were coming from stakeholders and therefore use this information to be incorporated appropriately into the V1.1 update. SONI is using these engagements to welcome feedback and comments from industry and encourage the provision of any information which industry considers relevant.</p>
Key Benefits	SONI is now working on version 1.1 of Shaping Our Electricity Future. This will build on the foundations of the previous version, feedback since the launch and will recognise evolving energy and climate policy in Northern Ireland.

¹ [SONI SOEF Preparing for 80% Report Final.pdf](#)

² [PowerPoint Presentation \(soni.ltd.uk\)](#)

Strategic Theme	<p>A culture of effective engagement and collaboration</p> <p>A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>SONI together with the government, the Utility Regulator, DSOs, the public and industry will both lead and underpin the Northern Ireland response to climate change in the electricity sector.</p> <p>Our responsiveness to changing policy and targets is demonstrated in our proactive approach to collaborate with all stakeholders and obtain their views in how we update our roadmap through the call for inputs and associated webinar highlights our views that engagement and working with others brings this benefit of information sharing, to provide insight to SONI on what stakeholders consider important to recognise when updating our Shaping Our Electricity Future Roadmap.</p> <p>SONI considers this aligns with the Utility Regulator's goal of effective engagement and collaboration and also shows SONI's organizational learning and accountability. We recognise that the targets have increased and present challenges and we are deliberating with stakeholders on how best to approach these challenges.</p> <p>SONI uses engagement to present its plans to industry and stakeholders and provide updates on our progress of the four pillars of Shaping Our Electricity Future. These engagement activities provide a forum for industry and stakeholders to voice their views and get direct responses from SONI. Through the Advisory Council, we have the opportunity to work with industry and stakeholders in partnership to drive the projects forward whilst listening and taking into consideration the views of others in order to progress with achieving our government targets.</p>
Engagement	<p>Over the next seven years, SONI will develop significant amounts of new grid infrastructure. More than ever before, it's important that we gain the support of individual landowners, their neighbours, and the wider communities. Our public engagement has and will continue to provide a comprehensive, thoughtful, transparent, and inclusive approach where we listen to those who live near future grid infrastructure. The scale of this challenge is enormous – therefore SONI ensured community engagement and participation was a key part of the Shaping of Our Electricity Future Roadmap.</p> <p>SONI held a 6 week call for inputs on Shaping Our Electricity Future V1.1 on 22 July 2022. We then held an industry webinar on 11 August 2022.</p> <p>Engagement plays a pivotal role in Shaping Our Electricity Future.</p> <p>Through Shaping Our Electricity Future engagement we know that there is an appetite for increased engagement on electricity from all sectors; we also know that we are uniquely placed due to our role, to impart independent, data based thought leadership; the success of Shaping Our Electricity Future engagement programme, has given us the expertise and confidence to do so.</p> <p>In May 2022 SONI held our first Shaping Our Electricity Future Advisory Council Meeting. Minutes and Actions of each meeting are recorded and kept under</p>

review, and a summary of each meeting is published on the SONI website to inform industry.

At the first Shaping Our Electricity Future Advisory Council meeting, SONI called for expressions of interest from stakeholders in joining the Advisory Council.

SOEF Advisory Council provisional meeting dates	
1	04 May 2022
2	15 September 2022
3	18 January 2023
4	10 May 2023
5	13 September 2023
<i>Dates may be subject to change</i>	

SONI's engagement roadmap is detailed below – this will be updated in the publication of SONI's Shaping Our Electricity Future Version 1.1

Policy	Industry	Regional
<ul style="list-style-type: none">Continued briefings with DfE and UR in relation to roadmap roll out and evolutionBriefings with New Ministers and New/existing Permanent Secretaries/HOCS	<ul style="list-style-type: none">Engagement with key bodies such as SGI, Renewable NI and developersNI Chamber & SONI Energy Fora (Rolling schedule)Dedicated industry SOEF webinars (every 4 months) and fora (every 6 months)Shaping Our Electricity Future Advisory Council briefings.	<ul style="list-style-type: none">Biennial Cycle of Council engagement to support individual projects and SOEF roll outAnnual SONI Council Planning Officials WorkshopContinued engagement with NILGA and SOLACEEstablish NW presence (subject to funding)Continued collaborative working with NIE Networks on grid project engagement and communication

	<p>Civil Society</p> <ul style="list-style-type: none"> • Embed SONI's Enhanced 3 Part Process for Developing the Grid • Establish Community Fora pilot on forthcoming Mid Antrim Upgrade/ NW Reinforcement (subject to funding) • Publish our public engagement commitments 	<p>Landowners</p> <ul style="list-style-type: none"> • Ongoing engagement with UFU and NIAPA • Landowner workshop series on energy/ climate transition • Develop and implement a landowner engagement strategy as an extension of our Enhanced 3 Part Process for Developing the Grid • Senior Landowner Engagement Officer 	<p>Communications</p> <ul style="list-style-type: none"> • SONI Knowledge Hub • Cost effective Regional Media campaigns in support of projects in 'part 2' of our engagement process • Revised SONI Website 	
Performance Measure	Stakeholder Engagement measured through Advisory Council Meetings and workshops and the timely publication of the Shaping Our Electricity Future V1.1			
Timescale	Publication in February 2023 Engagement in January 2023, May 2023 and September 2023 and throughout 2022 - 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Stakeholder Needs Assessment

Deliverable	FWP23-12: Stakeholder Needs Assessment
Description of Activities	<p>SONI plans to undertake a Stakeholder Needs Assessment with the aim of using this material to develop a Stakeholder Engagement KPI.</p> <p>The stakeholder needs assessment will take the form of a public consultation to gather information and views across all stakeholders and cover the entirety of the SONI business and projects which are in progress or planned. This is targeting a consultation in early 2023.</p> <p>SONI will use the feedback provided to facilitate the development of a Stakeholder Engagement KPI. This is targeted to be completed by June 2023.</p>
Key Benefits	<p>This project will allow SONI to gather information around stakeholder views across various areas of the business.</p> <p>SONI can use this information to inform those business areas of the feedback provided and use this during project development.</p> <p>It will also allow SONI to develop a Stakeholder Satisfaction metric which we can use to measure our performance across all areas of the business in terms of stakeholder sentiment, to provide a qualitative and quantitative measure of SONI performance.</p>
Strategic Theme	<p>A culture of effective engagement and collaboration A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>SONI is taking the learnings from the stakeholder submissions and feedback provided during the 2021-2022 evaluative performance framework process and developing the stakeholder satisfaction performance measure. This builds in another layer of accountability for SONI and demonstrates our responsiveness to the needs of the stakeholder.</p> <p>This will also promote increased collaboration internally and externally. There will be a need from SONI to engage stakeholders in the provision of open and transparent feedback in order to allow us to work with the information provided and build a truly reflective score based on these submissions.</p> <p>It will also require coordinated collaboration within SONI, we will need to work across all departments to ensure we are asking stakeholders the appropriate questions, covering all areas of the business and ensure that this is an understandable and clear consultation in order that there is no confusion as to what is expected of stakeholders.</p>
Engagement	Engagement will be a key part of this project. SONI will be consulting on the stakeholder needs assessment in order to gather information which will lead to the development of a Stakeholder Engagement KPI for future use.

	SONI will engage internally in order to compile the relevant questions to maximise the use of information through internal engagement and deliberation. We will publish a consultation for a period of at least 6 weeks to allow stakeholders the required timescales to consider all areas of the SONI business. We will then publish our findings and detail our next steps, which will include the development of a performance measure.			
Performance Measure	Stakeholder Engagement and the timely provision of the stakeholder needs assessment.			
Timescale	June 2023.			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Data and Digitalisation

Deliverable	FWP23-13: Data and Digitalisation
Description of Activities	Agree Open Data Sharing with NIE Networks
	<p>SONI exists in an environment where we are a data driven organisation. Leveraging and sharing data is a key enabler for the transformation of the power system for future generations. SONI recognises that there is a gap between where we are today and the future data capabilities needed.</p> <p>A joint working group has been established with NIE Networks and the first meeting took place in April 2022. SONI and NIE Networks will be meeting regularly (every 3 to 4 weeks) to progress a programme of work which both parties have agreed. This is in order to develop a joint approach to data and digitalisation where appropriate and to work collaboratively on initiatives such as the development of an NIE Networks open data portal, which was demonstrated at the UR's Data and Digitalisation Workshop in September 2022. This will have direct links to the SONI SmartGrid Dashboard³ so together we present "one version of the truth", in that our data is aligned.</p>
Key Benefits	<p>As indicated by the Department for the Economy, data and digitalisation are a key step to enable decarbonisation. All consumers will benefit from open data. SONI plans to build on the extensive dataset that is already published across the SONI and SEMO websites.</p>
Strategic Theme	<p>Collaborating and coordinating to promote a holistic, customer-based service approach to digitalisation</p> <p>Whole system collaboration and coordination with 3rd parties, and NIE Networks across its various roles as a TO, DNO and DSO</p> <p>SONI is collaborating and coordinating with NIE Networks, in partnership, discussing and deliberating over the requirements of a Data and Digitalisation Strategy, what tools need to be implemented and what stakeholders will require in the future, to ensure a holistic approach is taken with regards to customer service and the use of digitalisation in the provision of information and providing transparency.</p> <p>Data and Digitalisation are of some significance in the context of the NI Energy Strategy and the UR's Forward Work Plan and service priorities. SONI presented at the UR's Data and Digitalisation Workshop in September 2022 alongside NIE Networks, and the Energy Storage Company. This provided some key insights into what is needed, why it is needed and how this should be addressed and an opportunity to demonstrate the joint workings between SONI and NIE Networks.</p>
Engagement	<p>SONI is engaged with NIE Networks in a joint collaboration on Data and Digitalisation. We are actively discussing the projects and work required and we will continue to collaborate and coordinate with NIE Networks over the period to implement a prioritised work plan.</p>

³ [EirGrid Group plc - Smart Grid Dashboard](#)

Performance Measure	Open Data sharing agreement reached			
Timescale	September 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Support the NI Energy Strategy

Deliverable	FWP23-14: Support the NI Energy Strategy
Description of Activities	<p>SONI has reviewed the NI Energy Strategy and the 2022 Action Plan⁴ and identified 5 areas where we are actively supporting DfE in its policy development:</p> <ul style="list-style-type: none"> • Renewable electricity support scheme (AP12) • Develop an action plan to deliver 1GW of offshore wind from 2030 (AP14) • Prepare a Northern Ireland Smart Systems and Flexibility Plan (including Data/Digitalisation) (AP19) • Build further evidence and understanding on the linkages across our whole energy system (modelling) (AP22) • Review legislation and regulation requirements in the context of energy decarbonisation goals (AP21) <p>We also expect to support the development of the CBA for Smart Metering (AP20).</p> <p>SONI has and will continue to engage with DfE and other stakeholders to support the delivery of the 2022 Action Plan. This involves engagement in various working groups and regular engagement with the leads and teams within the DfE. This work also involved regular engagement with the UR and NIE Networks as well as industry (e.g. Off shore developers).</p> <p>SONI does not have visibility of the DfE Action Plan for 2023 and therefore will need to be adaptable in order to continue to support the delivery of the NI Energy Strategy. Our expectation is that many of the initiatives included in our forward work plan will complement and benefit the work being progressed by DfE.</p> <p>The key activities SONI plan to progress include:</p> <ul style="list-style-type: none"> • Maintain regular schedule of meetings between the relevant government departments and SONI • Arrange briefings with relevant stakeholders on key SONI outputs (e.g., GCS, SOEF, TESNI, etc.) • Representation on relevant working groups and influence to align with internal work plans to ensure consistency and efficiencies. • Partnership arrangement with NIE Networks – joint working to support DfE deliverables
Key Benefits	<p>The key benefit associated with supporting the NI Energy Strategy is where SONI can bring a depth of knowledge and experience to the forefront of discussions and inform the decision-makers, this will allow the UR and DfE to be fully informed prior to progressing activities or agreeing timelines.</p> <p>The achievement of the government set targets in relation to climate change will be the greatest benefit we can realise from this supporting</p>

⁴ [The Path to Net Zero Energy. Safe. Affordable. Clean. \(economy-ni.gov.uk\)](https://economy-ni.gov.uk)

	work, but it will also have further benefits on NI Consumers such as costs and security of supply once we achieve this ambition. This programme is the first step into setting in motion a programme of work to be delivered by 2030 and beyond.			
Strategic Theme	Whole system collaboration and coordination with 3rd parties, and NIE Networks across its various roles as a TO, DNO and DSO A culture of open and collaborative innovation The key theme behind this programme of work will be working in collaboration with partners. The NI Energy Strategy Path to Net Zero sets significant objectives for Northern Ireland that can only be achieved by embracing the changes required and working together in partnerships. SONI has joined a number of working groups surrounding the activities which are key to the Transmission System Operation and also are aligned with NIE Networks TO / DNO / DSO priorities. We have commenced work on this pathway and are working together in partnership with others in each working group to establish a programme of activities and deliverables associated with bringing about the changes required as a result of the energy strategy targets			
Engagement	SONI will be involved in various engagement activities over the period. We are involved in a number of working groups organised by the Department for the Economy in order to bring our knowledge and expertise to discussions on how best to achieve the renewable targets. For instance, SONI will be a key facilitator in the progression of offshore wind, through our Connection Offer Process. We will be engaging over what actions SONI needs to take proactively in order to be able to progress these types of connections and listening to what other voices contribute in terms of potential challenges being faced. We will also be collaborating with NIE Networks in progression of data and digitalisation and providing open data for stakeholders which is consistent across TSO, DSO, DNO, and TO.			
Performance Measure	As the DfE's action plan is continuing to evolve this programme of work will be monitored throughout the period to ensure we are progressing and achieving the deliverables set out in the DfE action plans.			
Timescale	Throughout 2022 – 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Annual Innovation Report

Deliverable	FWP019: Annual Innovation Report
Description of Activities	<p>Preparation and Publication of the SONI Annual Innovation Report.</p> <p>A key business improvement that we will be undertaking over the period will be the preparation and publication of our Annual Innovation Report. As part of this annual innovation reporting process, we will seek to 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 2023, with a consultation to be open for feedback from February 2023 to March 2023. 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 2023.</p>
Key Benefits	<p>This activity will provide transparency with our stakeholders and allow SONI to listen to feedback from stakeholders in which activities are considered to bring the most benefit to consumers.</p>
Strategic Theme	<p>A culture of open and collaborative innovation A culture of effective engagement and collaboration A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>Our Annual Innovation Report provides detail around the projects being considered for the year ahead, that SONI considers to be an important enabler in order to meet our 80% RES-E Targets and operate a safe, secure and reliable Transmission System in a net zero future.</p> <p>It also involves taking the lessons learned from last year's publication process and associated projects and using this to improve on the planning and organisational learning processes in order to meet policy.</p> <p>It will involve working with partners to bring about positive change and listening and discussing with industry the projects we consider add value and their thoughts and views on whether these are appropriate, more should be done or provide insight on other potential projects which we could be considering.</p>
Engagement	<p>Engagement will be a key activity for the publication of the Annual Innovation Report. SONI intends to publish a version of the report for consultation on and encourage all stakeholders to participate so that we receive submissions from all perspectives on any potential projects for the future.</p>

	There will be internal engagement during the preparation of the consultation and following receipt of all submissions so that we can deliberate over the feedback which will be provided and use these submissions to inform our future innovation plans.			
Performance Measure	Timely publication of the Annual Innovation Report and stakeholder engagement to inform which projects should progress to UR funding request.			
Timescale	April 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

SONI Mid-Year Performance Review

Deliverable	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 2022-2023.</p> <p>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 2023.</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>
Key Benefits	<p>The key benefit of the Mid-Year Performance Review is we have the opportunity to reflect on our achievements to date, what successes occurred and what learnings we have made.</p> <p>This will be open and transparent with stakeholders so that they can see the progress being made and provides the opportunity to inform stakeholders and gather information from stakeholders on their views or concerns and a key opportunity for any and all feedback.</p> <p>This can also pass through into our planning for future Forward Work Plans.</p> <p>It also provides the opportunity for internal coordination and collaboration, to discuss and reflect on projects which have been completed and pass those learnings on to projects still in progress, as well as bring that level of transparency through externally.</p>
Strategic Theme	<p>A culture of effective engagement and collaboration A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>The Mid-Year Performance Review provides the opportunity to work internally collaboratively in information gathering across departments and coordinating the detail required for stakeholders. It also encourages organisational learning and embracing change, providing an opportunity for all parties involved in the preparation of the Forward Work Plan to hear stakeholder views on the plan and progress to date, and take those viewpoints away for further consideration and potential development in order to improve on future plans.</p> <p>This can then be used to provide stakeholders with an accurate position on all programmes of work in the 2022 – 2023 Forward Work Plan and provide SONI with an opportunity to engage with all stakeholders, provide the updates and detail any potential mitigating actions where necessary, and listen to stakeholder views. This will provide SONI with an excellent opportunity to receive some information on stakeholder opinions and</p>

	where there may possibly be any issues, receive feedback from stakeholders which may be beneficial in putting into practice in the future.			
Engagement	<p>SONI will be inviting stakeholders and industry to attend a mid-year performance update workshop as per the UR's Guidance on the Evaluative Performance Framework.</p> <p>This will provide SONI with an opportunity to update all stakeholders on the progress of the 2022 – 2023 Forward Work Plan and also provide an opportunity for all stakeholder voices to be heard regarding their views on the progress to date and expectations for the future.</p> <p>This will provide SONI with the opportunity to receive feedback ahead of the preparation of the Forward Work Plan 2023 – 2024 and time to incorporate stakeholder opinions and insight into the subsequent plan.</p>			
Performance Measure	Successful SONI Mid-Year Review Workshop – SONI will be able to assess the quality and quantity of feedback received, during the event and following the event, feedback pertaining to how the event was held from the UR and the independent panel and use this to measure our success.			
Timescale	Publication of Mid-Year Update – April 2023 Mid-Year Update Workshop - May 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

SONI Publication of the Forward Work Plan 2023-2024

Deliverable	FWP022: SONI Publication of the Forward Work Plan 2023 – 2024
Description of Activities	<p>Continued implementation of the Utility Regulators Evaluative Performance Framework.</p> <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 process which occurs during the period will be the publication of our annual Forward Work Plan for the period 2023 – 2024 which will be targeted for the end of September 2023.</p> <p>Over the period SONI will be monitoring the progress of the 2022 – 2023 plan. By the end of December 2023, 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 2022 – 2023 plan following its publication. These opportunities for feedback will be significant to SONI in considering its preparation for our 2023 – 2024 Forward Work Plan.</p> <p>Following receipt of the feedback, SONI will begin the planning of next year's plan, reviewing all feedback and assessing this against the changes made from the 2021 – 2022 plan and this publication. SONI will use this feedback to inform our 2023 – 2024 plan. The initial phase will be using the feedback provided to assess the layout and structure of the 2023 – 2024 Plan. Following this, SONI will commence preparation of the 2023 – 2024 Plan whilst maintaining an awareness internally of the workshops, consultations and various engagement activities that are ongoing and the opportunities to incorporate feedback from these events, as well as maintaining an awareness of developing policies with regards to the DfE's Energy Strategy Action Plan and the UR's Forward Work Programme alongside policy and legislative changes.</p> <p>The 2023 – 2024 Forward Work Plan will then be published by the end of September 2023.</p>
Key Benefits	<p>This activity will enhance our transparency with our stakeholders and allow SONI to listen to feedback from stakeholders in which activities are considered to bring the most benefit to consumers. This will provide clarity to stakeholders regarding what activities are being held over the period which may be of importance to them and provide them with the opportunity to engage with SONI.</p> <p>It will also provide a number of opportunities for SONI to receive direct feedback from stakeholders, the UR and the independent panel as to our performance and views on our plans.</p>
Strategic Theme	<p>A culture of effective engagement and collaboration A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p>

	<p>The Forward Work Plan 2023 – 2024 provides SONI with an opportunity to engage for better outcomes for all. This includes internal engagement, liaising across departments as the business planning for the year progresses, seeing the programmes of work being planned for the year and discussing what the expectations are. This also allows an internal challenge across departments of projects on timelines, benefits and engagement activities and that information is gathered for the publication of the document.</p> <p>The publication also facilitates external engagement, through the UR's call for stakeholder submissions on the plan, the UR's stakeholder event and the independent panel and UR's determination on our performance.</p> <p>The theme that ties the publication together is that our activities correlate to the operation, development and enhancement of the Transmission System. All activities included in our plan can be linked back to this core theme.</p>			
Engagement	<p>SONI has used the feedback obtained during the 2021 – 2022 Forward Work Plan to inform our 2022 – 2023 Plan; stakeholder submissions to the UR, the feedback received during the UR's stakeholder event on the 2021 – 2022 plan, the independent panel's report and the UR's final determination.</p> <p>Engagement activities for the publication of the 2022 – 2023 Forward Work Plan also include the UR's call for stakeholder submissions and a stakeholder event held by the UR on 15 November 2022. These engagement activities will provide SONI with an opportunity to hear stakeholder views on the plan, as well as give SONI an opportunity to present on our plan, listen to stakeholder views and respond to stakeholders directly.</p> <p>Stakeholder Satisfaction is one of the four SONI outcomes in relation to the Evaluative Performance Framework and as such engagement is also a key activity associated with the publication of the plan.</p>			
Performance Measure	The timely publication of the SONI Forward Work Plan, the quality and quantity of feedback received during the UR's call for stakeholder submissions, stakeholder event and the independent panel and UR's final determinations on the plan will all contribute towards SONI's measure of success			
Timescale	September 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Balancing Market Principles Statement

Deliverable	FWP021: Balancing Market Principles Statement			
Description of Activities	<p>Consulting upon Balancing Market Principles Statement (BMPS) V7.0</p> <p>An important business improvement activity to focus on 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 2022-2023, with the final version BPMS V7.0 due to be published by June 2023.</p>			
Key Benefits	<p>Revised version of Balancing Market Principles Statement available to inform stakeholders.</p> <p>It also brings increased transparency, as this document describes what we do and how we make our decisions.</p>			
Strategic Theme	<p>A culture of effective engagement and collaboration</p> <p>SONI will be engaging internally in the preparation of version 7 of the Balancing Market Principles Statement, challenging the document to ensure appropriate revisions are made. This will then be consulted on with industry, stakeholders and the UR to provide SONI with their views on potential changes that may be required in order to better strike that balance as described above.</p>			
Engagement	<p>As described above, engagement will be a key activity (both internally and externally) in the preparation and consultation of the Balancing Market Principles Statement Version 7.0.</p> <p>SONI will be engaging with industry, stakeholders and the UR in early 2022.</p>			
Performance Measure	<p>Timely consultation process, feedback will be assessed on quality and quantity as per our Appendix 6: Stakeholder Engagement and the timely provision of the document to the UR for approval.</p>			
Timescale	June 2023			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Grid Code Studies

Deliverable	FWP23-16: Grid Code Studies			
Description of Activities	<p>A Modification proposed⁵ has raised some complex questions as to the appropriateness of some of the technical parameters in the SONI Grid Code given the technology currently available and statutory requirements. Technical studies are required to assess the potential benefits of a change to clause CC.S1.1.3.8 of the SONI Grid Code in respect of the minimum stable generation in relation to the maximum continuous rating of generating units connected to the NI System.</p> <p>Over the period SONI will work with technical specialists to study the potential minimum generation parameters and will share the outcome with the Grid Code Review Panel and UR. Should these studies recommend that the parameters are updated, SONI will then follow the modifications process to seek UR approval to modify the code.</p>			
Key Benefits	<p>The following benefits have been identified for the project.</p> <ul style="list-style-type: none"> • A consistent open and transparent approach to changing the SONI Grid Code to further objectives in line with SONI's obligations • Independent expertise giving comfort to the UR and SONI Grid Code Review Panel Members of the aims of the study and expected outcomes • A technical review [as part of study] will give sight of similar parameters in other jurisdictions giving opportunities to align if appropriate for Northern Ireland 			
Strategic Theme	<p>A culture of effective engagement and collaboration</p> <p>Over the period SONI will work with technical specialists to study the potential minimum generation parameters and will share the outcome with the Grid Code Review Panel and UR. This open engagement and collaboration between SONI and the technical specialists will be integral to the objectives set out in the Grid Code Studies.</p>			
Engagement	<p>This scope of work for the study has been discussed several times at SONI Grid Code Review Panel meetings and an earlier iteration has been shared with the SONI GCRP Panel Members from December 14th, 2021 to January 07th 2022. No comments or queries were received from Panel members over this period.</p>			
Performance Measure	<p>Timely provision of the outcome of the studies to the Grid Code Review Panel and the UR</p>			
Timescale	<p>April 2023</p>			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

⁵ Para 6.4 - in 2021-06-25-epk-36-month-derogation-ktg6.pdf (uregni.gov.uk)

Grid Code Modifications

Deliverable	FWP23-17: Grid Code Modifications
Description of Activities	<p>SONI expects to be delivering three at least sets of modifications to the Grid Code during 2022/23. These are described below and will cover:</p> <ul style="list-style-type: none"> • Battery Grid Code Modifications • RoCoF modifications <p>Battery Grid Code Modifications -September 2023</p> <p>Objectives & Key Benefits: Incorporation of current Battery Implementation Note into Grid Codes to provide legal basis and clarity for TSOs and Industry</p> <p>Key Actions & Deliverables: Bring forward modifications to the SONI Grid Code to incorporate the existing Battery Implementation Note, conduct the related consultation and submit recommendations to UR before end 2022/23.</p> <p>RoCoF Modifications</p> <p>Objectives and key benefits: SONI has been working with industry to change the RoCoF capability of the generation portfolio in Northern Ireland to accommodate additional volumes of renewable generation. This transition and the associated testing is now at a stage where the new obligations can be codified in the Grid Code and enter into force.</p> <p>Key actions and deliverables: SONI's consultation on the proposed modification closed at the end of August 2022. SONI will be submitting report and request for approval, with the aim of ensuring the new parameters are in effect during the year.</p>
Key Benefits	<ul style="list-style-type: none"> • RoCof modifications will make parameters that are essential to accommodate additional renewables mandatory and enforceable • Battery modifications will support efficient, safe and secure operation of Energy Storage units
Strategic Theme	<p>A culture of open and collaborative innovation</p> <p>A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>SONI has been working with industry to change the RoCoF capability of the generation portfolio in Northern Ireland to accommodate additional volumes of renewable generation. This is one element which demonstrates SONI's innovative partnerships with industry. This element is now bringing the learnings from these partnerships into policy, therefore demonstrating the organisational learning undertaken, which will continue to progress throughout the modifications programme of work detailed above.</p>
Engagement	<p>All modifications will be processed in line with the procedure published on SONI's website. The Grid Code Review Panel will assess all proposals</p>

	ahead of formal consultation with wider stakeholders. In addition these modifications are supported by our wider industry engagement via meetings and workshops			
Performance Measure	Modification process followed for three sets of changes, stakeholder views considered and proposals submitted to UR			
Timescale	Before end 2022/23			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

Security of Supply Publications

Deliverable	FWP23-22: Security of Supply Publications
Description of Activities	<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.</p> <p>SONI will be publishing the next GCS for the period 2023-2032 prior to Autumn 2023, 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.</p> <p>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>
Key Benefits	Providing these publications gives a transparent view of the operation of the Transmission System of SONI and our performance across the system which informs stakeholders but also groups such as the UR, DfE and government to assist them with their decision-making processes.
Strategic Theme	<p>A culture of effective engagement and collaboration</p> <p>A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>The Publication of these materials provides an accurate perspective of the potential issues concerning Security of Supply. These themes occur throughout this role as it is primarily the sharing of information, derived from modelling and analysis, to inform stakeholder, regulators and Government of the situation over the short-term and long-term in order to facilitate longer term planning and highlight any critical issues that need immediate review and consideration. This also incorporates organisational learning from previous iterations, the questions posed</p>

	during the preparation process and modelling and using those learnings to make improvements to the overall publication process.			
Engagement	Engagement at an early stage is important in order to ensure we achieve our target date of publication for the GCS. SONI is planning to engage regularly with the UR throughout this process to ensure transparency. SONI considers that through these engagements for the duration of the workstream, this will provide valuable insight into the questions that UR consider important, enable us to use our lessons learnt from the recent process, and we can ensure that this is consistent in ensuring the same clarifications are made in the 2023-2032 publication.			
Performance Measure	Timely publication of the Generation Capacity Statement and Winter Outlook documents as well as internal feedback and external feedback on the associated drafting/publication processes and final publication.			
Timescale	June 2023 to October 2023 as detailed above			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

SONI TSO – DSO Operating Model

Deliverable	FWP23-23 SONI TSO – DSO Operating Model
Description of Activities	<p>Develop and agree TSO/DSO operating model vision and principles</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 Governments' policy ambitions.</p> <p>SONI and NIE Networks are working together and have developed a TSO-DSO joint programme of work.</p> <p>Development of the enduring TSO-DSO Operating Model is a key focus of the next iteration of the SONI/NIEN multi- year plan.</p> <p>Key Deliverable: March 2023 - Agreed Vision and Principles for the TSO-DSO Operating Model, supported where appropriate by a set of illustrative end-to-end use cases</p>
Key Benefits	<p>Initial:</p> <ul style="list-style-type: none"> The development of the Operating Model direction will allow for interim capabilities to be piloted and trialled <p>Enduring:</p> <ul style="list-style-type: none"> TSO and DSO will be able to operate the respective systems with pioneering levels of variable renewable generation and low carbon technology. Customers will be able to effectively participate in local and system wide markets
Strategic Theme	<p>A culture of effective engagement and collaboration</p> <p>Whole system collaboration and coordination with 3rd parties, and NIE Networks across its various roles as a TO, DNO and DSO</p> <p>In order to develop and agree a TSO/DSO operating model vision and principles, SONI will be working in partnership with NIE Networks in order to bring about a positive change.</p> <p>Working in collaboration and coordination with NIE Networks will be important for both SONI and NIE Networks to deliver on this operating model in the future, but in order to agree the fundamental principles and vision in the short term.</p>
Engagement	SONI is engaging with NIE Networks and together have developed a joint TSO – DSO programme of works. SONI is working together in partnership with NIE Networks and over the period will be developing and agreeing the TSO – DSO operating model vision and principles.
Performance Measure	Our performance will be measured against the achievement of an agreed Vision and Principles for the TSO-DSO Operating Model, supported where appropriate by a set of illustrative end-to-end use cases

Timescale	March 2023 Target completion date of end of 2025 for- Enduring Operating Model to be defined.			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction

SONI Publications

Deliverable	FWP23-24: SONI Publications
Description of Activities	<p>Over the period SONI will make a number of publications. These include:</p> <p>All Island Transmission System Performance Report</p> <p>The All-Island Transmission System Performance Report include transmission system data and performance statistics which are key to ensuring that stakeholders are informed and measure our success in achieving our decarbonisation targets. We will have a strong focus towards our 75% SNSP which is now an operational policy, Low Carbon Inertia Services, and Minimum Number of Conventional Generation Units, which are key to ensuring we achieve our decarbonisation outcome.</p> <p>SONI is required by our licence obligations to publish this Report by the end of June each year, which we exceeded in 2022 by providing this in May 2022. We are therefore setting a target date for publication earlier than anticipated at May 2023.</p> <p>Annual Renewable Energy Constraint and Curtailment Report</p> <p>SONI also publishes an Annual Renewable Energy Constraint and Curtailment Report⁶ on our website each year. It is prepared in collaboration with EirGrid, as TSO for Ireland, in order to cover the Northern Ireland, Ireland and the All-Island aspects of the electricity system. The Annual Renewable Energy Constraint and Curtailment Report details the level of dispatch down energy for the year, as required under European⁷ and Member State Legislation⁸. SONI will be publishing the 2022 – 2023 report by August 2023.</p> <p>SONI has provided the following publications for a number of years:</p> <ul style="list-style-type: none"> • Short-Term Demand Forecasting Methodology • Wind and Solar Forecasting Methodology • Demand Forecast (ENTSO-E) • Demand Forecast (Smart Grid Dashboard) • Demand Forecast (BMI) • Wind Forecast (ENTSO-E) • Wind Forecast (Smart Grid Dashboard) • Wind Forecast (BMI) <p>Since 2019, SONI has made improvements in our Energy Management System (EMS)</p>

⁶ <https://www.soni.ltd.uk/media/documents/Annual-Renewable-Constraint-and-Curtailment-Report-2021-V1.0.pdf>

⁷ Article 16C of the 2009 Renewable Energy Directive (2009/28/EC) states: “If significant measures are taken to curtail the renewable energy sources in order to guarantee the security of the national electricity system and security of energy supply, Members States shall ensure that the responsible system operators report to the competent regulatory authority on those measures and indicate which corrective measures they intend to take in order to prevent inappropriate curtailments.”

⁸ Article 4.4 of Statutory Instrument 147 of 2011 states: “If significant measures are taken to curtail the renewable energy sources in order to guarantee the security of the electricity system and security of energy supply, the transmission system operator shall report to CRU on those measures and indicate which corrective measures it is intended to take in order to prevent inappropriate curtailments.”

	<p>which we continue to implement and as such now also offer additional detail as follows:</p> <ul style="list-style-type: none"> • Demand Forecast (Market Data Static Report on SEM-O website) • Demand Forecast (Market Data Dynamic Report on SEM-O website) • Aggregated Wind Forecast (Market Data Static Report on SEM-O website) • Aggregated Wind Forecast (Market Data Dynamic Report on SEM-O website) <p>SONI also jointly (with EirGrid) produces a number of publications which are made available on the TSO section of the SEMO website, alongside the SONI website. These are detailed in Section 6 of the Balancing Market Principles Statement⁹. SONI will continue to provide accurate and timely information for the weekly publication of the Operational Constraints Updates.</p>
Key Benefits	<p>Data and digitalisation is one of the key themes from the UR Forward Work Programme and the NI Energy Strategy.</p> <p>Following on from this, the benefits open data can bring and having accurate and timely publications only aids to inform stakeholders.</p> <p>By making these publications, SONI is not only compliant with its TSO Licence but we are also showing support to stakeholders from all areas as to what is planned, what is happening in real time on the Transmission System and what we need in the future as well as how we plan to address these needs.</p> <p>This information provides clear detail to the stakeholder on our views and allows them to provide informed responses during any periods of consultations across other programmes of work.</p> <p>Providing these publications gives a transparent view of the operation of the Transmission System of SONI and our performance across the system which informs stakeholders but also groups such as the UR, DfE and government to assist them with their decision-making processes.</p>
Strategic Theme	<p>A culture of effective engagement and collaboration A culture of organisational learning, accountability and planning that supports SONI agility and responsiveness in meeting policy, regulatory and market development</p> <p>SONI engages internally in the preparation and publication of the above materials and also work in collaboration with EirGrid TSO in relation to the All-Island aspect of these publications. This links to the theme of engagement as the publications are there to inform stakeholders in their decision-making processes and highlight the positive work we are progressing, for instance with regards to removing certain constraints in our programmes of work and our world-leading position with regards to SNSP.</p>

⁹ <https://www.soni.ltd.uk/media/documents/EirGrid-and-SONI-Balancing-Market-Principles-Statement-V6.0.pdf> - Section 6 Publications, pages 55 to 59

	<p>This is also aligned to the theme of operate, develop and enhance the all-island grid as the preparation of these publications informs SONI of our progress and can also indicate areas where we need to improve, therefore leading to the development of a new programme in order to enable this theme to be realised fully. This work facilitates a continuous learning process as we look at how we have performed over the period, the mitigations that were put in place and how effective these were in practice and we take those teachings on board for the next process.</p>			
Engagement	<p>Engagement at an early stage is important in order to ensure we achieve our target date of publication for the GCS. SONI is planning to engage regularly with the UR throughout this process to ensure transparency. SONI considers that through these engagements for the duration of the workstream, this will provide valuable insight into the questions that UR consider important, enable use to use our lessons learnt from the recent process, and we can ensure that this is consistent in ensuring the same clarifications are made in the 2023-2032 publication.</p>			
Performance Measure	<p>Timely publication of the All-Island Transmission System Performance Report and Annual Renewable Energy Constraint and Curtailment Report documents as well as internal feedback and external feedback on the associated drafting/publication processes and final publication.</p>			
Timescale	<p>Throughout 2022 – 2023 and May 2023 and August 2023 as indicated above</p>			
SONI Outcome	Decarbonisation	Grid Security	System Wide Costs	Stakeholder Satisfaction