Flexibility Needs Assessment

Unlocking Flexibility and Storage for a Cleaner Power System

13th October 2026

SONI System Operator Northern Ireland

Context and Regulatory Background

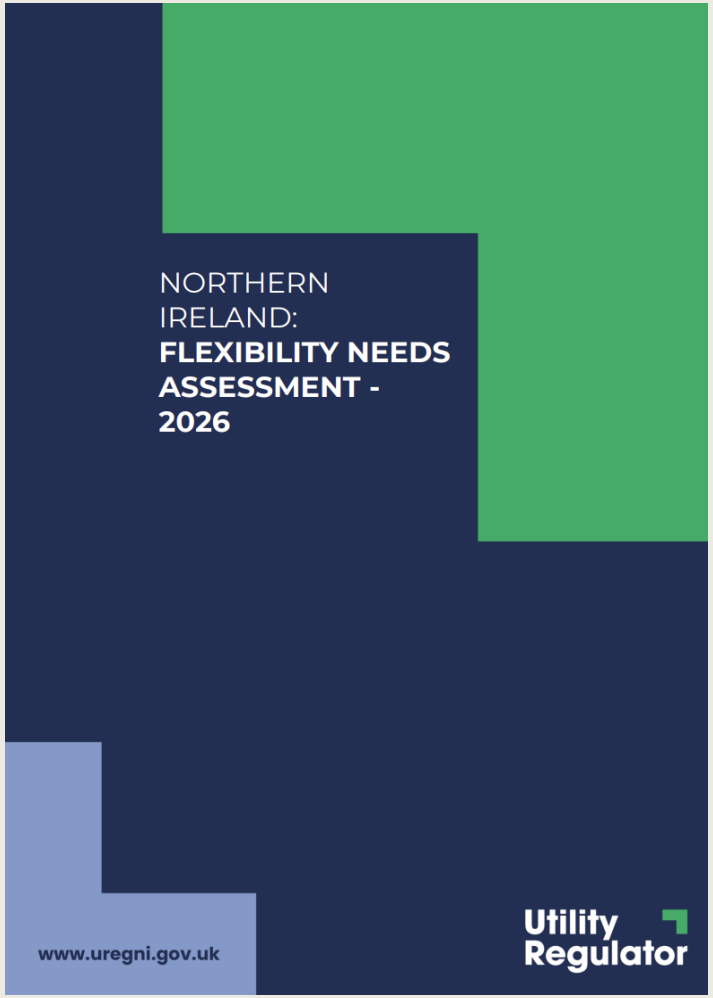
The Flexibility Needs Assessment (FNA) is a new mandatory process driven by EU Regulation: The Electricity Market Design Reform (EMDR).

The purpose of the FNA is to guide electricity network operators and Member States in identifying how much non-fossil and flexibility their country needs.

Standarised analysis methodology developed by ENTSO-E and the DSO Entity; approved by ACER.

Jurisdictional reports required.

Northern Ireland's first FNA report was delivered on 14th September.



FNA: A new biennial process for analysing flexibility needs

Medium term planning



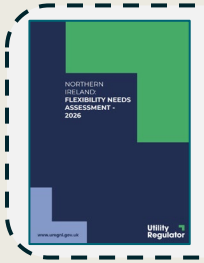
All-Island Resource Adequacy Assessment
Ten-year demand and generation and adequacy forecasts.



All-Island Ten Year Transmission Forecast Statement
Assessment of opportunities for new connections.



Transmission Development Plan
Ten-year development plans for the transmission network.



Flexibility Needs Assessment (FNA)
Assessment of the flexibility needs across Northern Ireland.

- 2026 report published in September.
- 5-10 year flexibility needs outlook.
- Analysis to be repeated every 2 years.

Long term scenario planning



Tomorrows Energy Scenarios
Energy transition scenarios until 2050.



Tomorrows Energy Scenarios Needs Assessment
Long term needs of the transmission system.

Strategic Visions



Shaping Our Electricity Future
A single scenario to deliver 2030 targets.

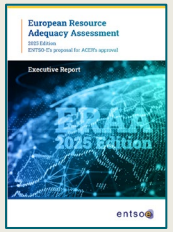
European planning



Ten Year Network Development Plan – Scenarios Report
ENTSO-E's pan-European energy scenarios



Ten Year Network Development Plan
Assessment of pan-European projects.



European Resource Adequacy Assessment
Pan-European resource adequacy assessment.

Collaborative approach to delivering the Flexibility Needs Assessment

Utility Regulator

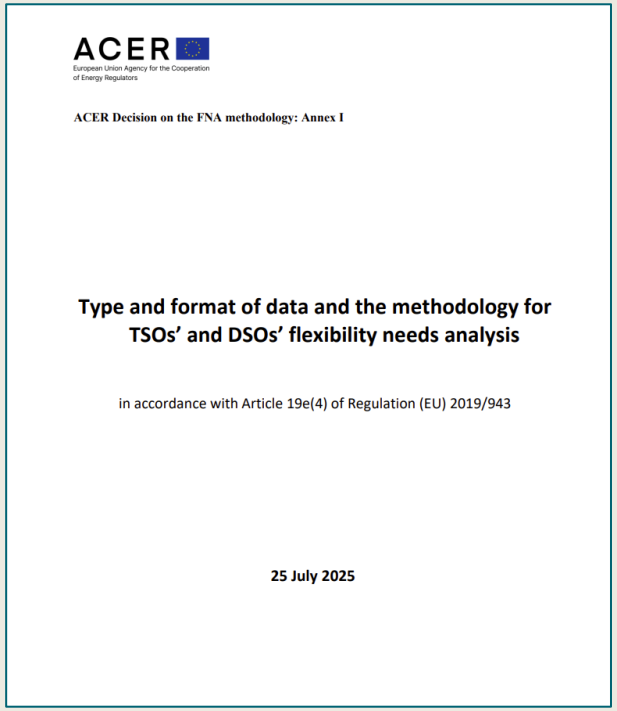
- “Designated Entity”, as nominated by the Department for the Economy.
- Responsible for overall completion of the report, publication and delivery of it to ACER and the European Commission.
- Target years analysed: 2030 and 2033.

SONI System Operator Northern Ireland

- Analysis focused on System needs, transmission network needs and market barriers to flexibility.
- Responsible for delivery of above analysis and outputs to the UR.
- All-island model used by both SONI and EirGrid allowing for a consistent approach on scenarios and assumptions.

Northern Ireland Electricity Networks

- Analysis focused on distribution network needs and market barriers to flexibility.
- Responsible for delivery of above analysis and outputs to the UR.


ACER
European Union Agency for the Cooperation of Energy Regulators

ACER Decision on the FNA methodology: Annex I

Type and format of data and the methodology for TSOs’ and DSOs’ flexibility needs analysis

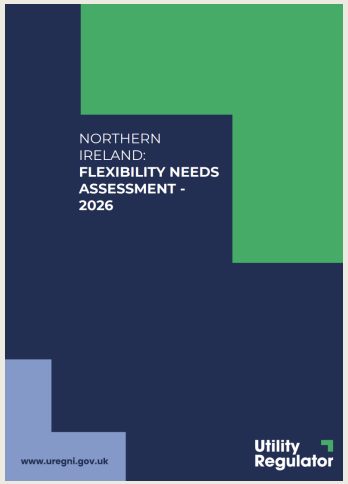
in accordance with Article 19e(4) of Regulation (EU) 2019/943

25 July 2025

Immediate follow-up work on the FNA in Northern Ireland

Actions and timeline driven by EU Regulation[1]:

Sept 2027



Published report

Jan 2027

Indicative National Objective for Non-fossil Flexibility.

Department for the Economy

?

1. Potential Non-fossil flexibility support scheme(s).
2. Potential integration of flexibility into the Capacity Remuneration Mechanism (CRM).

1. Regulation (EU) 2024/1747 Articles 19e-h

A wide variety of solutions are needed to maximise flexibility

	Projects	In SONI's Forward Workplan 2026-27 [1]	Status
1	Non-fossil Flexibility Objective (Jan-27)	✓	SONI is prepared to support DfE.
2	Flexibility Procurement	✓	Subject to the Flexibility Objective.
3	Maximum Export Capacity Sharing	✓	Scope of work in development.
4	Integrated Hybrid Connections	✓	Conceptual Overview in development.
5	Plan-led System Development	✓	Recommendations in development.
6	Flexibility and Capacity Market Design		SEMC: CRM 2.0 design option.
7	TSO-DSO Multi-Year Plan		Initial scoping planned for this year.
8	EU Network Code on Demand Response		Under European Commission review.
9	Flexible Connections		Initial deployment underway by NIEN.

1. Published 30th September 2026 for the year beginning 1 Oct 2026.

SONI System Operator Northern Ireland