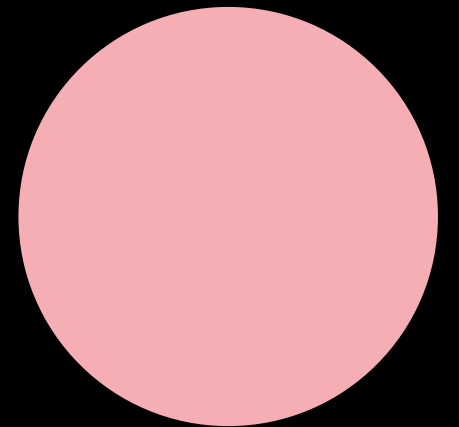
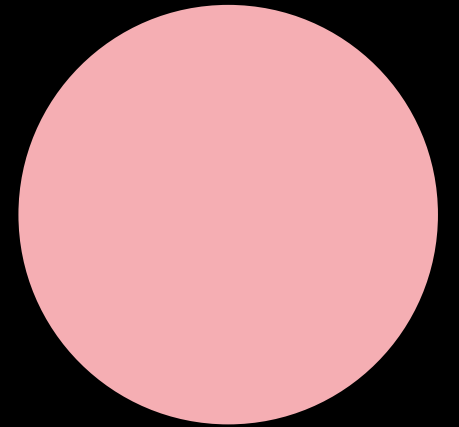

Code Administrators Survey 2021

Report

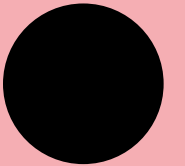
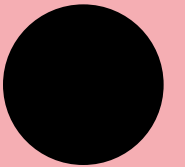




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Executive Summary



Executive summary

1

Whilst a number of satisfaction metrics were seen to decrease in 2019, this decline has not continued into 2021 with most factors remaining at previous levels or showing signs of improvement

2

There continues to be some differential around size of business and levels of experience with bigger more experienced users being more positive about their experiences

3

Overall the problems caused by Covid-19 would appear to have been handled very well with remote contact being seen as a positive in many instances (although some desire for face-to-face 'networking' opportunities were mentioned)

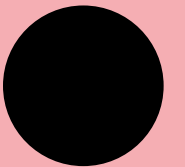
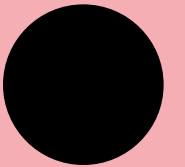
4

Consistency in approach/ processes between Codes would definitely help those working across a number of Codes (with the role of the Code Administration Code of Practice, CACoP, in achieving this being raised)

5

Clarity over the relevance of communications to specific businesses/ user types would appear to be one area where improvements could be made in the future (along with the digitisation of documents to aid the ability to find relevant information)

Objectives and Methodology



Multi-staged programme among code administrators' audiences

- As part of its 2016 Code Governance Review Final Proposals (Phase 3) (CGR3), it was concluded that Ofgem should commission a standardised **cross-code study to monitor and assess the performance** of code administrators in their role in respect of each code that they administer
- The study was not intended to take account of the relative funding of the Code Administrators (CA), or whether they offer value for money
- **SINCE INCEPTION IN 2017#, THE STUDY HAS BEEN REPEATED TO MONITOR PERFORMANCE AND IDENTIFY ANY NEW DEVELOPMENTS. SPECIFICALLY, THE SURVEY HAS BEEN DEVELOPED TO:**

1

IDENTIFY

Individuals' interaction with codes and CAs:

- Awareness of CA responsibilities
- Confidence in dealing with codes
- Expectations of the service which code administrators should be providing

2

MEASURE

Overall performance of CA on key metrics:

- Overall satisfaction
- Support
- Communications
- Modification process

3

ACCESS

Specific aspects of service delivery:

- Email
- Websites
- Meetings
- Accession process

METHOD

- MIXED MODE PROGRAMME OF RESEARCH AMONG INDIVIDUALS INTERACTING WITH CODES

FRAMING INTERVIEWS TO INFORM QUESTIONNAIRE DESIGN



6 in-depth interviews#

Fieldwork date:
24/5/21 – 28/5/21

CORE SURVEY TO MEASURE EXPERIENCE AND PERFORMANCE OF CAS



123 telephone participants



40 online participants

Fieldwork date:
14/6/21 – 15/7/21

FOLLOW-UP INTERVIEWS TO GET A DEEPER UNDERSTANDING OF DRIVERS OF SATISFACTION/DISSATISFACTION



25 follow-up in-depth interviews

Fieldwork date:
9/8/21 – 6/9/21

Online and telephone approach

1. Code administrators store their data in different ways with some unable to provide telephone contact details for all organisations that interact with their code
 - To represent the views of organisations interacting with codes, a multi-mode study of telephone and online approaches was required
2. Some differences in responses are evident between those taking part online compared with telephone completion
 - Many studies show that when people are interacting with an interviewer (in this instance on the phone), they are more likely to give positive answers than when completing online
 - Questions presenting the largest differences by method within this survey are key attitudinal questions such as overall satisfaction where responses are more positive for interviews conducted via phone
 - Examination of online results shows that lower satisfaction ratings are due to higher proportions giving neutral/ non-response answers rather than citing dissatisfaction
3. While a design effect is evident from the mixed mode approach, a simultaneous online/telephone method was required due to the lack of telephone sample available
 - This allowed for more robust numbers by which to analyse individual codes and to ensure that a broad set of organisations could be invited to participate. Exclusion of organisations for which online contact only details were available may have resulted in other design effects on the data.
4. Data has therefore been combined with the understanding that there is an element of fluidity in satisfied to neutral ratings (in line with those seen in previous years)
5. However, it is important to note that this does not impact the overall message and conclusions arising from the research

Interviews achieved

- A total of **163** unique interviews were completed
- Many individuals interact with more than one code and it was considered too onerous for them to answer the survey on every relevant code
- Individuals were asked specific code-related questions for a maximum of 2 codes which were selected on a hierarchy basis to ensure optimum coverage of all codes (dependent on initial sample available). Overall **296** code specific responses were obtained
- This means some may have been asked about codes they interact with even if they were not in the sample file provided by the corresponding Code Administrator

Interviews achieved by code:

BSC	CUSC	DCode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC	UNC
34	32	28*	30	30	15*	28*	35	26*	19*	19*

The Code Administrators' customer universe is relatively small; as such, the sample achieved at a code level is also low. Some of the fluctuations seen in the year on year code level results are driven by the low sample sizes. It is therefore important to read results with a degree of caution; where there are statistically significant differences between 2019 and 2021, these are explicitly stated.

The commentary in this report is based on all responses. Code specific insights are provided in separate reports.

• *Denotes low base

Interpreting results

- Throughout the report, Code level results are shown side by side. Results are not meant to be compared, instead they provide a read of ratings for all codes in a single place. By their very nature, codes are different:
- Some are more technical than others
- Others are more commercial
- The level of funding varies by code
- These differences mean that the governance processes and the role of the code administrator varies by code and therefore the level of service provided may not be consistent and therefore cannot be directly compared

Key

Data presentation

Data remains unweighted (i.e. no adjustment has been made for under/over representation of any sub-groups)

Question wording and bases are shown at the foot of relevant slides

Data for individual codes are shown, when relevant, in alphabetical code order

Where base sizes are small, this is shown by an * for base of **less than 30** and ** for base of **less than 15**

For most KPIs, results are shown for all responses (as individuals could respond in relation to up to 2 codes)

Statistical difference between sub samples

Where a figure is significantly **lower** than that of one or more related variable(s), it is bordered with a **red** box

The comparable variable figure(s) defined as significantly **higher**, is bordered with a **green** box

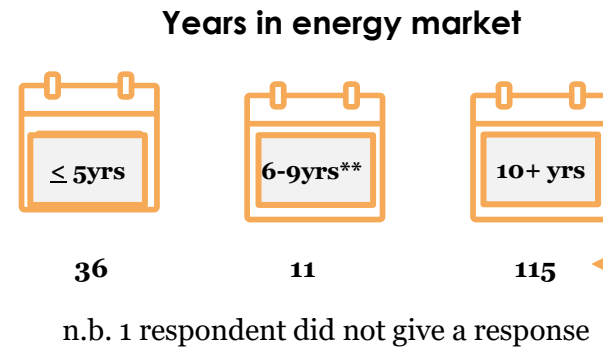
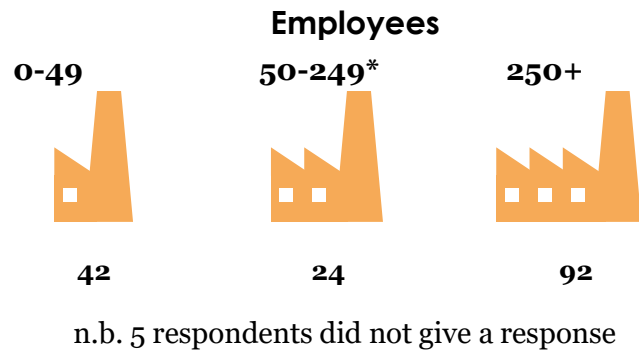
NET refers to the combined figure of the top or bottom 2 measures

Where movements are noted that are not statistically significant these are referred to as 'directional increases/ decreases'

Key groups of interest

- The research highlights organisation size and the number of years operating in the energy market as key experience and perception differentiators

Interviews achieved by type:



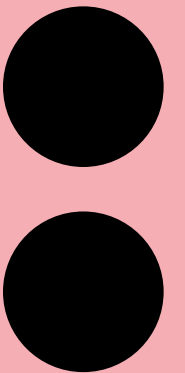
These base sizes increase to robust levels on KPIs as these are analysed on all responses (some respondents answered for more than one code)

- 43% of companies with 0-49 employees have been operating for 6+ years so, as in previous years, we are showing sub-group data for both company size and length of experience as 'small company' does not necessarily mean 'new company'

*small base size
**very small base size } interpret with caution

Industry Context

(pre-stage qualitative feedback)



COVID-19 AND HOME WORKING

- IT IS IMPORTANT TO NOTE THE SIGNIFICANT CHANGES IN WORKING PATTERNS/ PROCESSES SINCE THE LAST RESEARCH WAS CONDUCTED IN 2019
 - Two years on from the last survey, code administrators service provision has undergone some changes. While some codes have made broad changes across their communications, all have had to adapt to the impact of the Covid-19 pandemic which has resulted in much heavier reliance on remote working and virtual communications.
 - There is also consistent experience of dealing with more urgent modifications over the last months (although the quantitative research suggests the actual number of businesses requesting modifications is lower).
 - Covid-19 had not had an impact on staffing within code administrators with workload remaining stable or increasing as a result of greater pressure on the energy network. Some code administrators were aware of customers facing difficulties with resourcing which has impacted on ability to engage with codes and attend meetings.

CHALLENGES REMAIN WITHIN THE INDUSTRY

The biggest challenges being faced within the industry were noted as being:

- dealing with the volume of modifications, particularly urgent modifications
- customers challenging decisions which may be out of code administrator hands and based on legislation
- establishing more cross-code working and collaboration
- resourcing within customer organisations
- how does the industry move to zero carbon in the next 30 years

CHANGES TO SERVICE PROVISION SINCE 2019 SURVEY

Changes to service provision

Code administrators have sought to act on the results of previous surveys, in particular reviewing their communications processes. Many of the changes have been refinements rather than major development including:

- improving clarity of communications
- flags on emails to identify whether action is required
- minor changes to websites to aid navigation

Some codes have undergone more substantial changes such as DCUSA implementing the digitalisation of codes and a move to more self-serve.

The most significant change to communications across all codes has been the enforced reliance on virtual meetings most commonly via MS Teams. This has been a positive experience for both code administrators and industry parties with feedback beginning to be gathered on preferences for future interaction when Covid-19 restrictions ease.

For many, platforms such as MS Teams have offered an enhanced experience in comparison to previous teleconference facilities however if there is a return to mixed mode meetings with some representatives present and others virtual, difficulties may again arise with managing input (as opposed to all being in the room or all online).

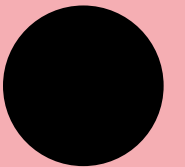
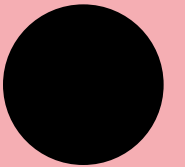
IMPACT OF RETAIL ENERGY CODE (REC)

For the 2021 Quantitative research the survey focussed on the existing SPAA and MRA codes.

With REC in place from 1st September and succeeding SPAA and MRA, these two codes have not implemented significant changes in the past year with greater concentration on winding down and managing the transition to REC.

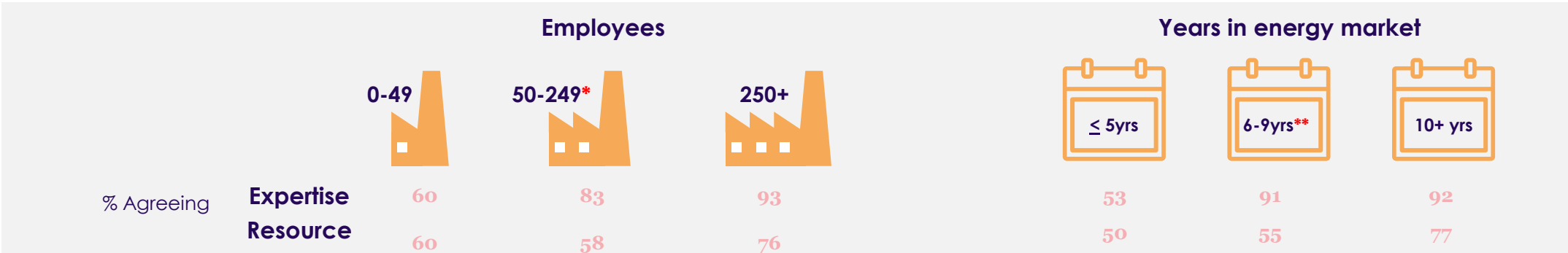
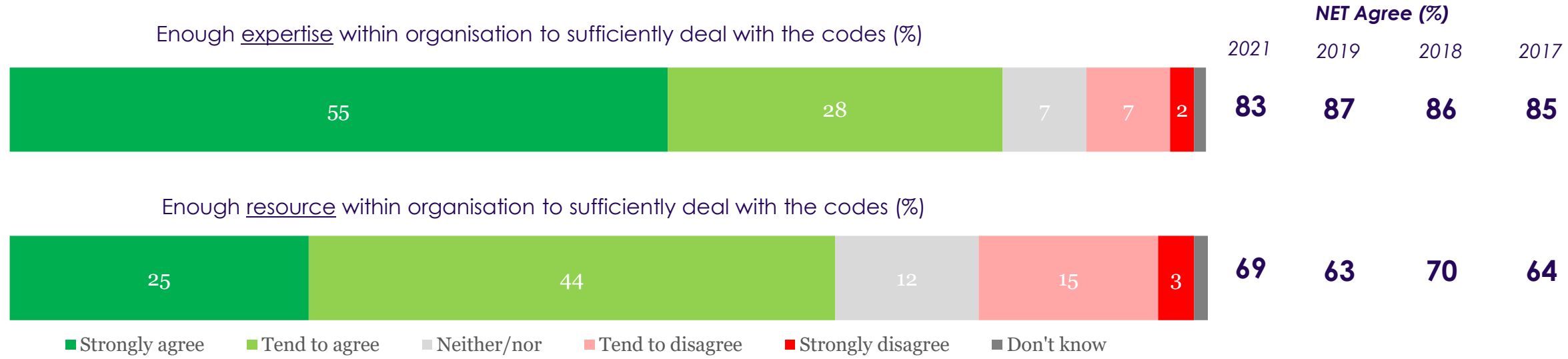
As REC will have a fully digitalised portal, it is also expected that once this has bedded in and customers are acclimatised, expectations will rise for other codes to provide interaction in this way.

Organisation Profiling



Expertise and resource

- THE MAJORITY OF INDIVIDUALS AGREE THEIR ORGANISATION HAS THE EXPERTISE TO DEAL WITH CODES. HOWEVER AVAILABILITY OF RESOURCE CONTINUES TO BE AN ISSUE FOR ALMOST 1 IN 5



Q1. To what extent would you agree or disagree that your organisation has sufficient expertise to enable you to deal with the codes you are responsible for or interact with? Base: All respondents (163)
 Q2. And to what extent would you agree or disagree that you have enough resource within your organisation to sufficiently deal with the codes you are responsible for or interact with? Base: All respondents (163)
 *small base size **very small base size } interpret with caution

Expertise and resource

- SMALL TO MEDIUM SIZED BUSINESS SEE GREATER DIFFERENTIAL IN PERCEPTIONS OF EXPERTISE RATHER THAN RESOURCE LEVELS (IT IS ONLY FOR THE VERY LARGE AND ESTABLISHED BUSINESSES THAT RESOURCE BECOMES LESS OF A CONCERN)

"Problem now is they are big unwieldy documents so better suited to larger companies which have the teams to deal with them"

"I think we're all serviced in a similar way, from talking to counterparts in other organisations from what I can tell we're all receiving a similar service whether you're a small or a large player"

"I would have liked, as a start-up, more of a welcome pack from Code Administrators"

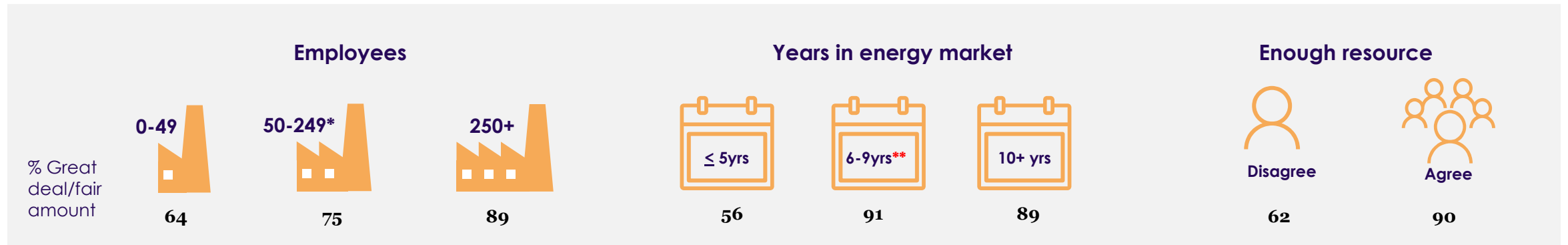
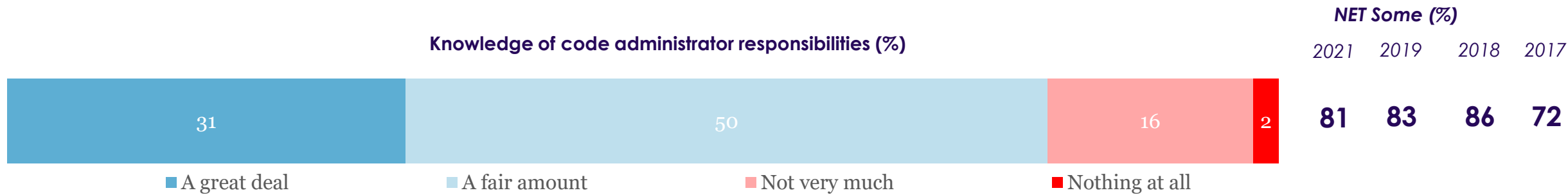
Resource

Resourcing remains a challenge for organisations; one in five indicate they do not have enough resource to sufficiently deal with codes

Organisations with the resource tend to have multiple people working on different aspects of one code. Those with less resource; therefore want the Code Administrators to provide them with easy to digest information and guidelines so that they can stay on top of the various governance and changes to codes. Also where there is lower resource and individuals dealing with multiple codes there is a desire for consistency in approach amongst those codes.

Knowledge of code administrator responsibilities

- IN LINE WITH 2019, THE MAJORITY OF INDIVIDUALS CLAIM TO HAVE AT LEAST A FAIR AMOUNT OF KNOWLEDGE ABOUT THE RESPONSIBILITIES OF CODE ADMINISTRATORS



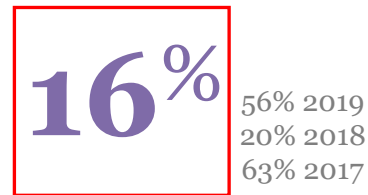
• Q4. Thinking generally, how much do you know about what the responsibilities of your code administrator(s) are? Base: All respondents (163)

 Significantly lower/higher vs. 2019

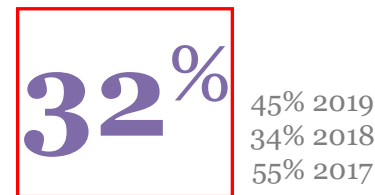
*small base size
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}
interpret with caution

Personal interaction with code

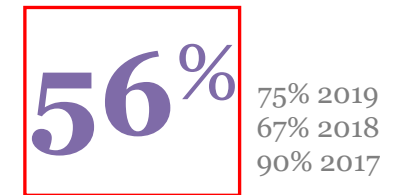
- THE FLUCTUATIONS WHICH CONTINUE TO BE SEEN YEAR ON YEAR ARE LIKELY TO BE DRIVEN BY INTERNAL PRIORITIES WITHIN ORGANISATIONS (2021 PRIORITIES SEEM CLOSER TO THOSE OF 2018 THAN 2019 OR 2017)



I have strategic overview of the code



I am responsible for managing my organisation's involvement with the code



I get involved when there are specific issues relating to my area of work

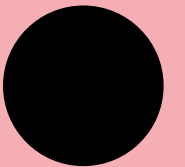
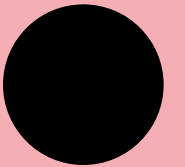
- The survey only includes individuals who are at least occasionally involved with codes
- Individuals tend to have multiple responsibilities in the way they interact with codes

Q6/Q6b. And, how long have you personally been interacting with the <code> code including your experience in any previous roles or organisations? Base: All responses for those involved with the code (296)

Q7. Which, if any, of the following best describes your current role in relation to the <code/codes>? Base: All responses for those involved with the code (296)

Significantly lower/higher vs. 2019

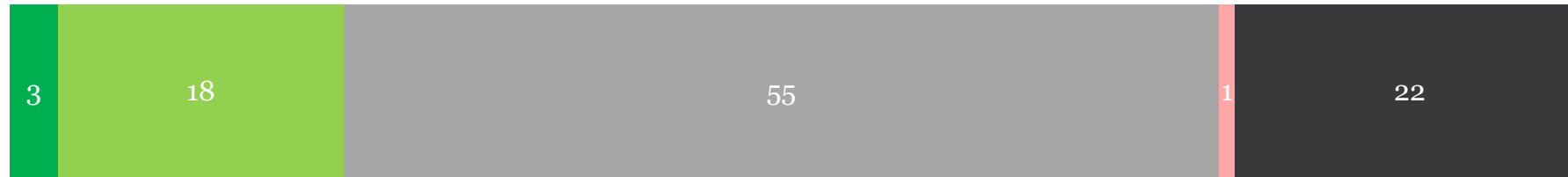
KPIs & Key Driver Analysis



Perceived improvements

- INDIVIDUALS CONTINUE TO HIGHLIGHT SOME IMPROVEMENTS IN THE SERVICE DELIVERED BY CODE ADMINISTRATORS WITH VERY FEW FEELING THE SERVICE HAS GOT WORSE

Thinking about the service that you have received in the last year, would you say it has improved, remained the same or got worse? (%)



■ Improved a lot ■ Slightly improved ■ Has not changed ■ Slightly worsened ■ Worsened a lot ■ Don't know

NET Improved (%)			
2020	2019	2018	2017
21	18	18	Not asked

By code

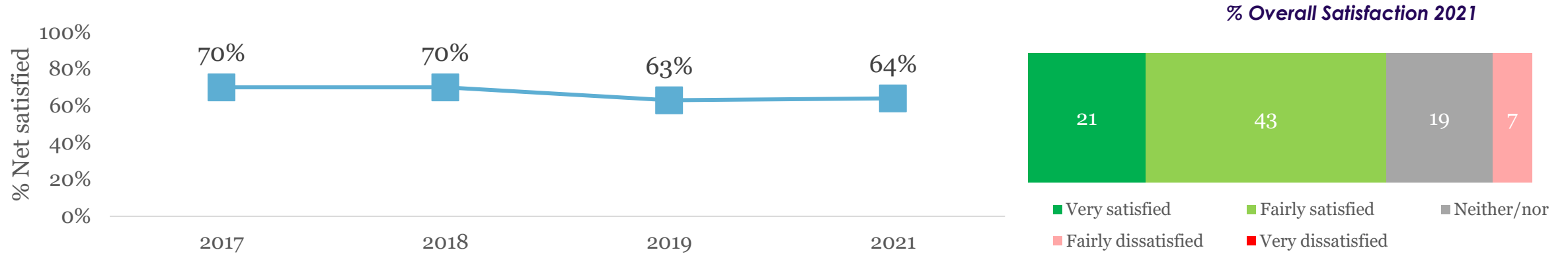
	BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net improved	12	34	18	17	30	27	14	29	12	11	26
Net worsened	6	0	0	0	3	0	4	0	0	0	5

• Q29b. Thinking about the service that you have received in relation to the <code> in the last year, would you say it has improved, remained the same or got worse?
 • Base: All responses (296)

*small base size
 **very small base size } interpret with caution

Overall satisfaction

- WHILST STILL LOWER THAN THE SATISFACTION RATINGS SEEN IN 2017 AND 2018, SATISFCATION REMAINS STABLE COMPARED TO 2019



By code

		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net satisfied	%	76	69	50	77	57	73	71	57	54	63	58
Net dissatisfied	%	9	16	7	3	7	7	7	6	4	5	11

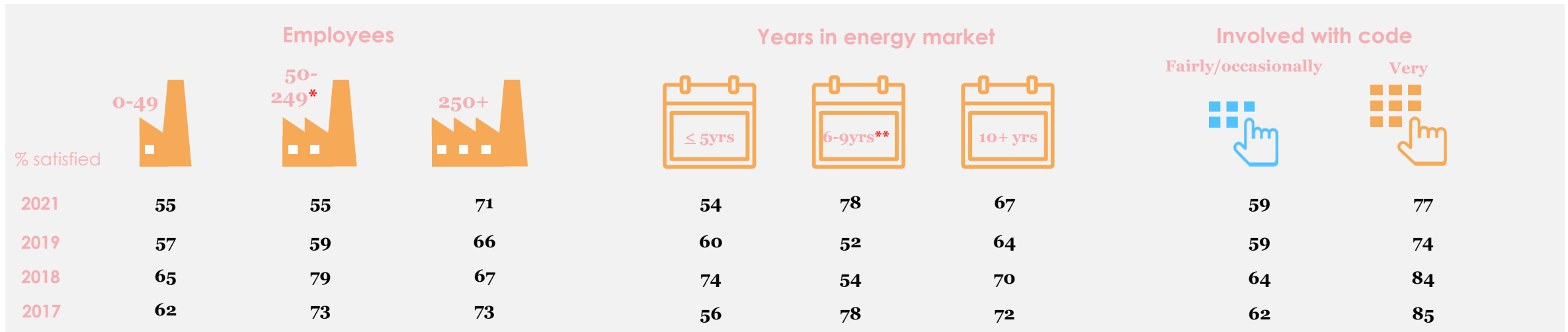
Significantly lower/higher vs. 2019

- Q10. Thinking about all aspects of your dealings with the code administrator in relation to <this/these> codes, overall how satisfied are you with the service provided to your organisation?
Base: All responses for those involved with the code (296)

*small base size
**very small base size } interpret with caution

Overall satisfaction

- THERE ARE NO SIGNIFICANT CHANGES BY GROUP COMPARED TO 2019, THOSE IN LARGER BUSINESSES, WITH OVER 5 YEARS EXPERIENCE OR WITH MORE INVOLVEMENT TEND TO BE MORE SATISFIED



- Whilst year on year movements are not statistically significant, satisfaction levels have continued to demonstrate downward trends from those within small and medium sized organisations
- Those who are very involved with codes continue to be more satisfied overall (77%) compared to those with less involvement (59%)

Significantly lower/higher vs. 2019

Q10. Thinking about all aspects of your dealings with the code administrator in relation to <this/these> codes, overall how satisfied are you with the service provided to your organisation? Base: All responses for those involved with the code (296)

*small base size
**very small base size } interpret with caution

Overall satisfaction

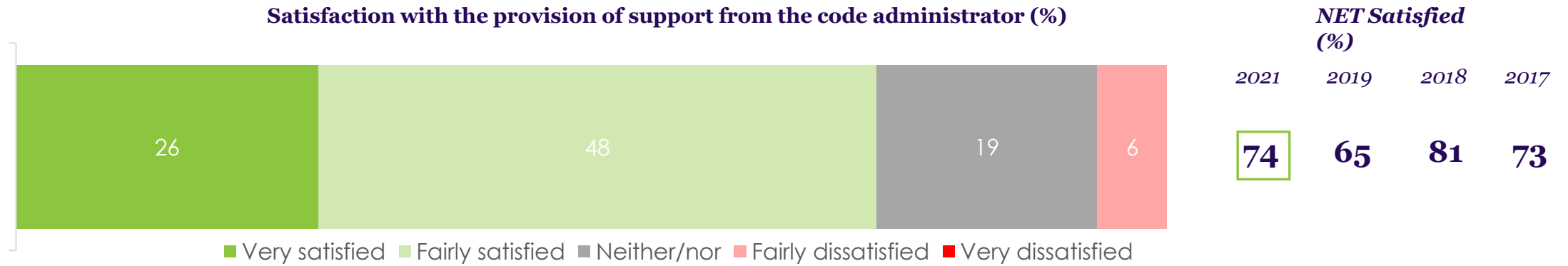
- INDIVIDUALS CONTINUE TO CONSIDER MANY FACTORS WHEN RATING THEIR EXPERIENCE WITH CODE ADMINISTRATORS

The most important aspects of CA service provision are consistent across customers. They include:

- Being able to get in touch with staff when needed
“Any questions we've got, any queries we've got we've got an account manager so it's great having that direct contact”
- Being able to talk to staff who are knowledgeable about the subject matter
“them knowing their codes inside and out is essential...when there are changes in personnel you see that dip”
- Having low staff turnover so there is consistency in the staff having contact with
“you can't negotiate with an organisation who constantly changes its staff“
- Support with modifications as in the actual drafting of them
“They do provide a good critical friend role with mods”
- Being kept updated on changes
“I get a lot of comms on both codes. It's about the right frequency and you need it to understand what's happening”
- Using less legal jargon and ensuring there is understanding of the code
“The core of the task is to display the legal text of the code in a way which is easy to navigate and find information easily”

Satisfaction with the provision of support

AFTER A DECREASE IN 2019, 2021 SEES A SIGNIFICANT INCREASE IN SATISFACTION WITH PROVISION OF SUPPORT FROM CODE ADMINISTRATORS



By code

□ □ Significantly lower/higher vs. 2019

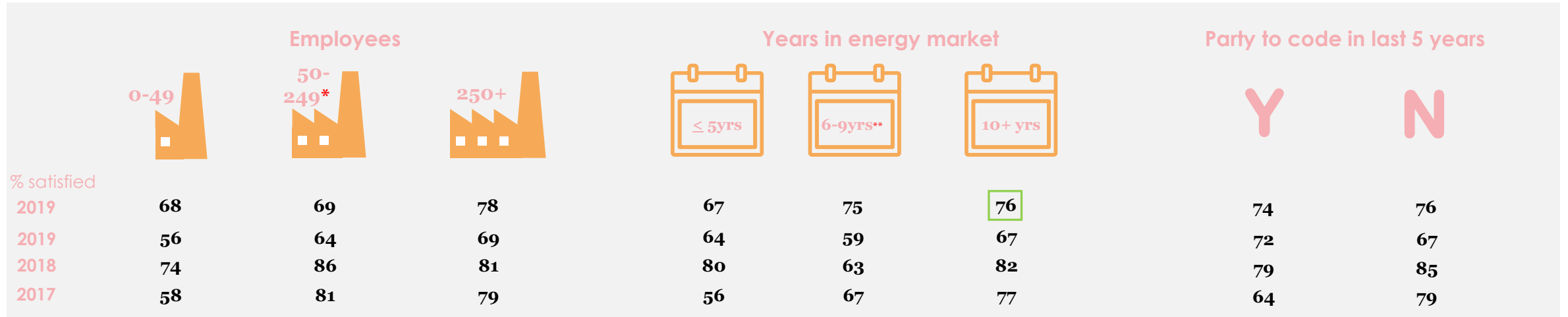
		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net satisfied	%	81	80	70	88	67	71	65	64	68	87	72
Net dissatisfied	%	3	13	4	4	7	14	4	9	0	0	11

* Q11a/Q11c. How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the <code>? Base: All responses for those aware of support (262)

*small base size
**very small base size } interpret with caution

Satisfaction with the provision of support

- ALL GROUPS SEE DIRECTIONAL INCREASES IN SATISFACTION WITH SUPPORT RECEIVED (THIS IS STATISTICALLY SIGNIFICANT FOR THOSE IN ORGANISATIONS THAT HAVE 10 YEARS OR MORE EXPERIENCE WITHIN THE MARKET)



- Businesses who have been in the market for 10+ years report a significant increase in the level of satisfaction with support received from Code Administrators
- However, there is a desire for more uniformity in support across codes and cross code working:

“They all take an insular view and I would like to see more of a helicopter approach but they all have their own individual interests and commercial incentives to keep it to themselves... I don't think there is any real barrier to greater collaboration they just create them”

- Q11a/Q11c. How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the <code>?
- Base: All responses for those involved with the code (262)

Significantly lower/higher vs. 2019
*small base size
**very small base size } interpret with caution

Satisfaction with support received when requested

- INDIVIDUALS ARE GENERALLY SATISFIED WITH THE LEVELS OF SUPPORT RECEIVED WHEN REQUESTED



By code

Significantly lower/higher vs. 2019

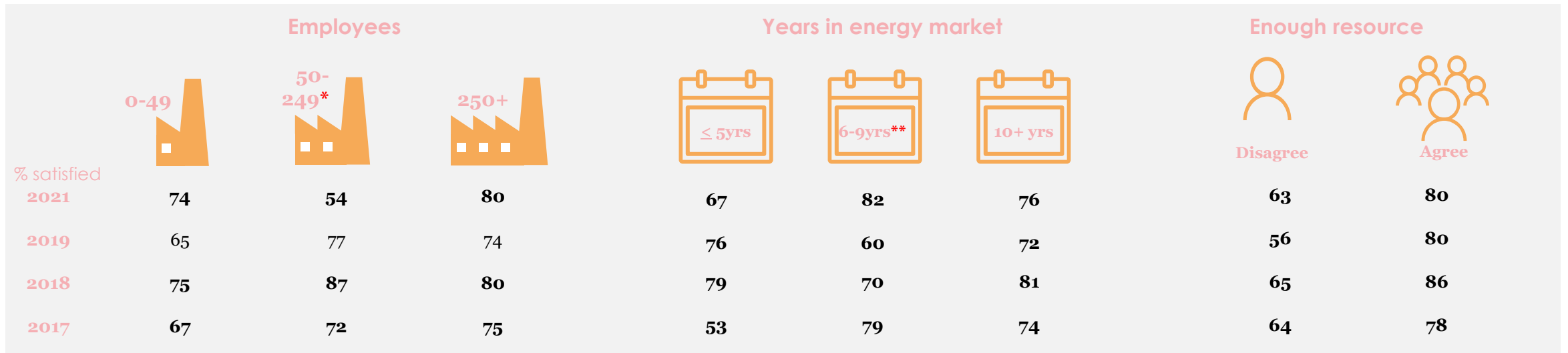
		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net satisfied	%	80	83	56	89	67	71	69	73	68	82	68
Net dissatisfied	%	7	7	8	0	7	0	4	3	0	0	0

• Q13/Q13b. And when you request support from the code administrator in relation to the <code> how satisfied or dissatisfied are you with the support you receive?
 • Base: All responses for those proactively seeking support (270)

*small base size
 **very small base size } interpret with caution

Satisfaction with support received when requested

- WHILST THERE ARE NO SIGNIFICANT DIFFERENCES MOST GROUPS SEE DIRECTIONAL INCREASES COMPARED TO 2019



The perceived level of resource available to individuals within an organisation is a key lever of satisfaction

- Only 63% of individuals who claim their organisation does not have enough resource are satisfied with the support they receive when requested compared to 80% of those from organisations where they feel there is enough resource

Significantly lower/higher vs. 2019

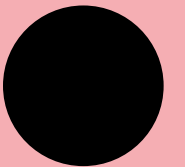
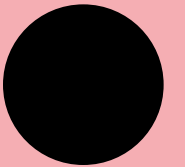
• Q13/Q13b. And when you request support from the code administrator in relation to the <code> how satisfied or dissatisfied are you with the support you receive?

• Base: All responses for those involved with the code (270)

*small base size
**very small base size } interpret with caution

In Detail

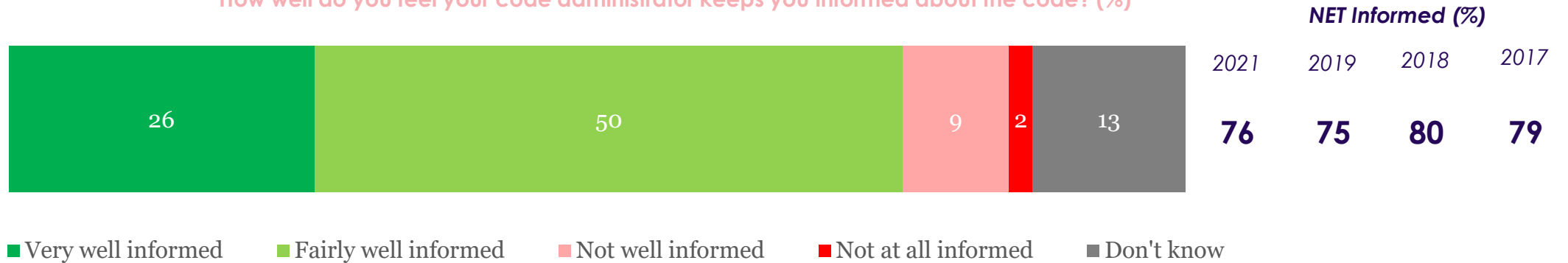
Perceptions of information



Kept informed about the code

- THE MAJORITY OF INDIVIDUALS FEEL THEY ARE KEPT WELL INFORMED ABOUT SPECIFIC CODES; RATINGS ARE SIMILAR TO THOSE SEEN IN 2019 (ALTHOUGH DIRECTIONALLY LOWER THAN 2018 AND 2017)

How well do you feel your code administrator keeps you informed about the code? (%)



By code

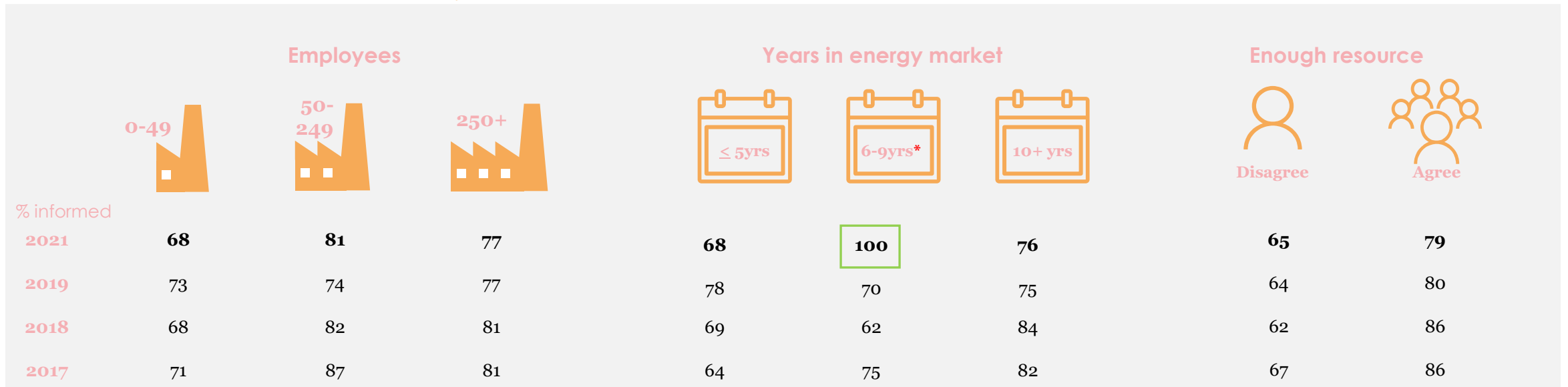
		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net informed	%	79	75	64	83	63	80	75	80	73	68	95
Net not informed	%	6	19	18	3	20	13	11	11	12	11	5

Q14/Q14b. How well do you feel your code administrator keeps you informed about the <code>? Base: All responses for those involved with the code (296)

*small base size
 **very small base size } interpret with caution

Kept informed about the code

- THE LESS ESTABLISHED BUSINESSES ARE LESS LIKELY TO FEEL THEY HAVE BEEN KEPT WELL INFORMED ABOUT THE CODES COMPARED TO 2019



- As seen in previous years, individuals within organisations that have limited resource, are less likely to claim they are kept well informed by they Code Administrators (65% compared to 79% among those with enough resource)
- Despite the low base size, there is a statistically significant increase in ratings for those who have been in the energy market for 6-9 years compared to 2019 (and all previous waves)

 Significantly lower/higher vs. 2019

• Q14/Q14b. How well do you feel your code administrator keeps you informed about the <code>? Base: All responses for those involved with the code (296)

*small base size
 **very small base size } interpret with caution

Kept informed about the code

- Overall, communications from CAs are viewed positively and seen to have been improving over the past few years. However, there are some areas where language could be simplified or made more relevant. There could also be more ‘telling/ signposting’ the implications/ key information rather than just making information available ‘to find’.
- Experience of cross-code working is limited and for those dealing with just one code, not something they feel is relevant to them. For those dealing with multiple codes the common opinion is that CAs could work more closely together to avoid duplication and/or times when modifications are only heard of at the last minute by other codes which are affected.
- There is awareness among some that the Code Administration Code of Practice (CACoP) has an aspiration to encourage more cross-code working but there is still more the codes and CAs could be doing to facilitate this and to work together.

“I want to know how our obligations might change, there has been no session on this but as a code user I have to read through literally thousands of pages and see what is different to previous codes which is very inefficient.”

“sometimes documents are not considerate of new kids status and use very technical language”

“CACOP was supposed to facilitate cross-code working but not seen much success from that group... CACOP hasn't really delivered or achieved these changes that we would like to see or enshrined or delivered that cross-code working”

“CACOP sentiment is right but it's just words and cross-code working may be promoted by industry but Code Administrators don't want it as essentially they're competitors”

Receiving information

- INDIVIDUALS CONTINUE TO BE RELIANT ON A BROAD RANGE OF INFORMATION CHANNELS WITH EMAIL NOTIFICATIONS THE MOST USED CHANNEL.

% saying their code administrator proactive supports them via these channels

Email notifications

Updates on website

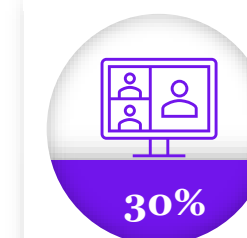
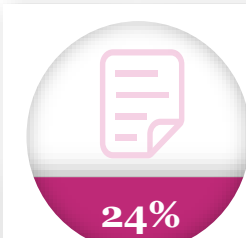
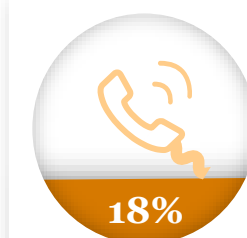
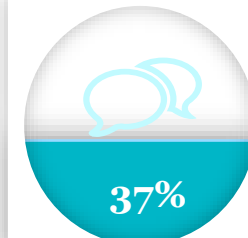
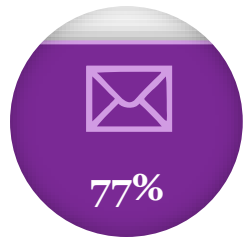
Meetings and workshops

Offering helpdesk

Newsletters

Through relationship manager

Virtual meetings app (Skype/Teams etc.)



% saying they proactively seek information/ support from their code administrator via these channels

Email

Updates on website

Meetings and workshops

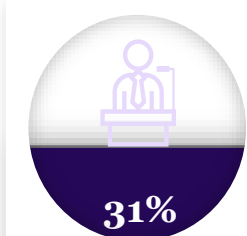
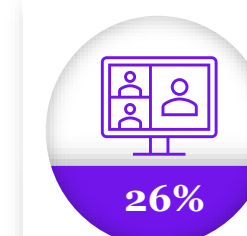
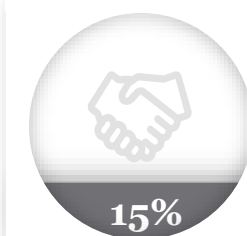
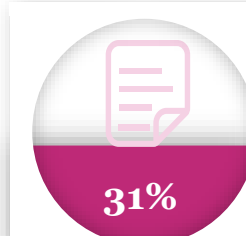
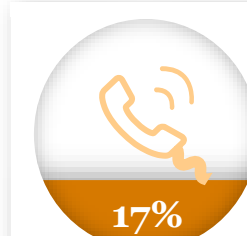
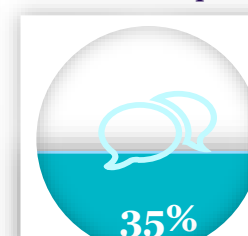
Offering helpdesk

Reading documents

Through relationship manager

Virtual meetings app (Skype/Teams etc.)

Individual contacts

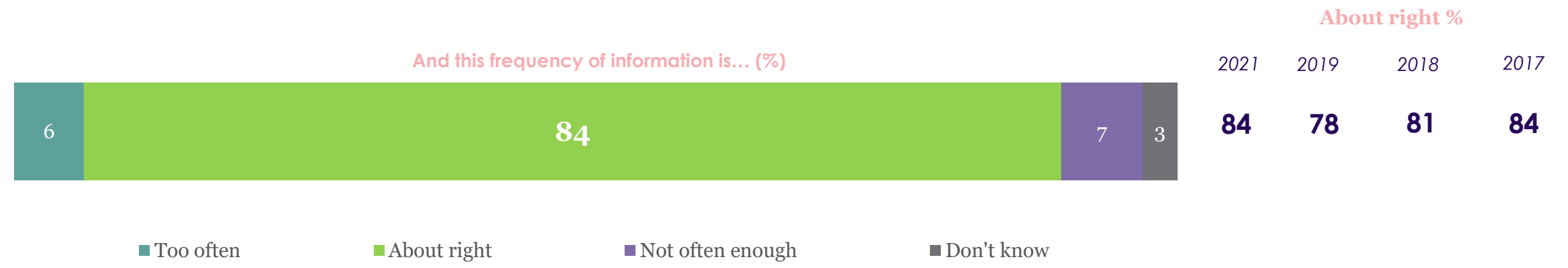
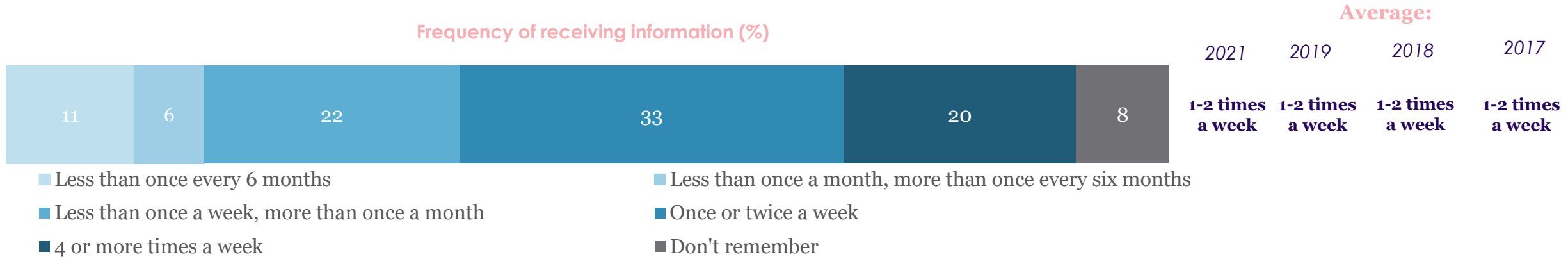


• Q11/Q11b. How does your code administrator proactively support you in your interactions with the code?

• Q12/Q12b. And how do you proactively seek information or support from your code administrator in relation to the code? Base: All responses for those involved with the code (296)

Frequency of receiving information from code administrator

- THE FREQUENCY OF RECEIVING INFORMATION FROM CODE ADMINISTRATORS IS STILL PERCEIVED AS ABOUT RIGHT BY THE VAST MAJORITY
- WHILST THERE IS A VARIETY OF FREQUENCIES THE AVERAGE REMAINS 1-2 TIMES PER WEEK.

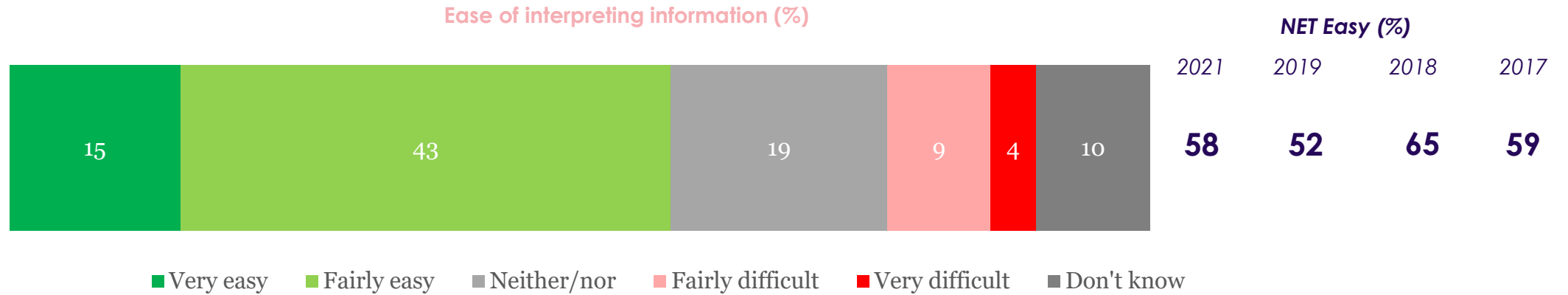


• Q16/Q16b. How frequently do you receive information regarding any aspects of the <code> from your code administrator? Base: All responses for those involved with the code (296)
 • Q17/Q17b. And what do you think about this frequency of information in respect of the <code>? Base: All responses for those involved with the code receiving information (231)

Significantly lower/higher vs. 2019

Ease of interpreting information from the code administrator

- WHILST THE MAJORITY FIND THE INFORMATION PROVIDED AT LEAST 'FAIRLY EASY' TO INTERPRET 14% DO HAVE SOME DIFFICULTIES



By code

		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net easy	%	74	44	50	63	47	67	61	54	62	63	58
Net difficult	%	6	28	11	3	17	7	14	17	12	5	21

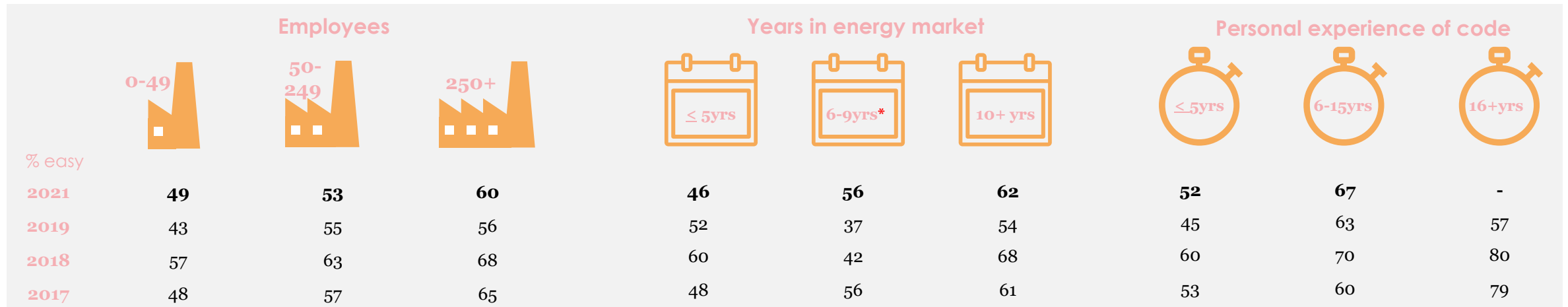
Significantly lower/higher vs. 2019

*small base size
**very small base size } interpret with caution

Q15/Q15b. Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to <code>? Base: All responses for those involved with the code (296)

Ease of interpreting information from the code administrator

INDIVIDUALS FROM LARGE ORGANISATIONS AND THOSE WITH MORE EXPERIENCE OF CODES REPORT HIGHER SATISFACTION LEVELS WITH THE EASE OF INTERPRETING INFORMATION – EXPERIENCE OF THE ENERGY MARKET DOES APPEAR TO BE A KEY DIFFERENTIATOR



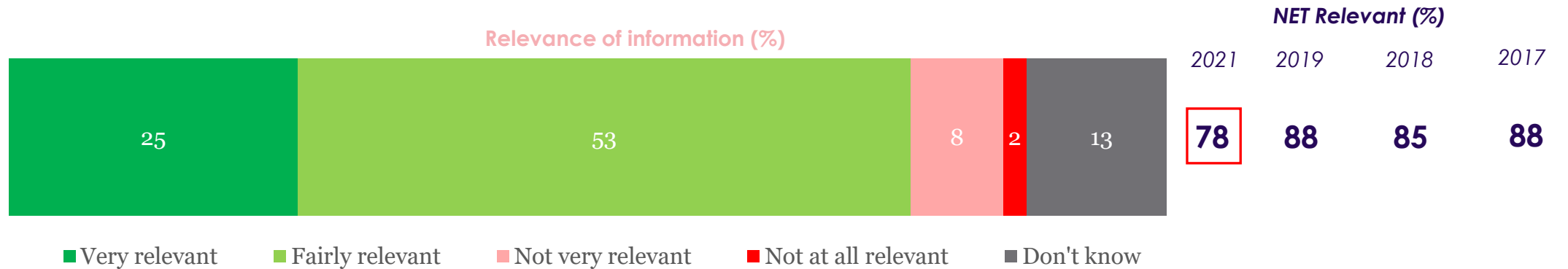
Significantly lower/higher vs. 2019

• Q15/Q15b. Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to <code>? Base: All responses for those involved with the code (296)

*small base size
**very small base size } interpret with caution

Relevance of information

- WHILST THE MAJORITY AGREE THE INFORMATION THEY RECEIVE FROM CODE ADMINISTRATORS IS RELEVANT THERE IS A SIGNIFICANT DECREASE IN THIS RATING COMPARED TO 2019



By code

		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net relevant	%	76	72	64	87	80	80	71	80	73	79	100
Net not relevant	%	9	19	18	3	10	7	11	9	8	5	0

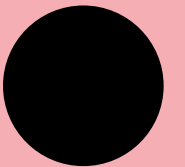
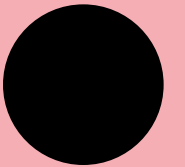
* Q18/Q18b. Thinking generally, about the information that your code administrator provides, how relevant is the information to you in dealing with the <code>? Base: All responses for those involved with the code receiving information EXCLUDING responses for those who do not get any information (296)

 Significantly lower/higher vs. 2019
*small base size
**very small base size

interpret with caution

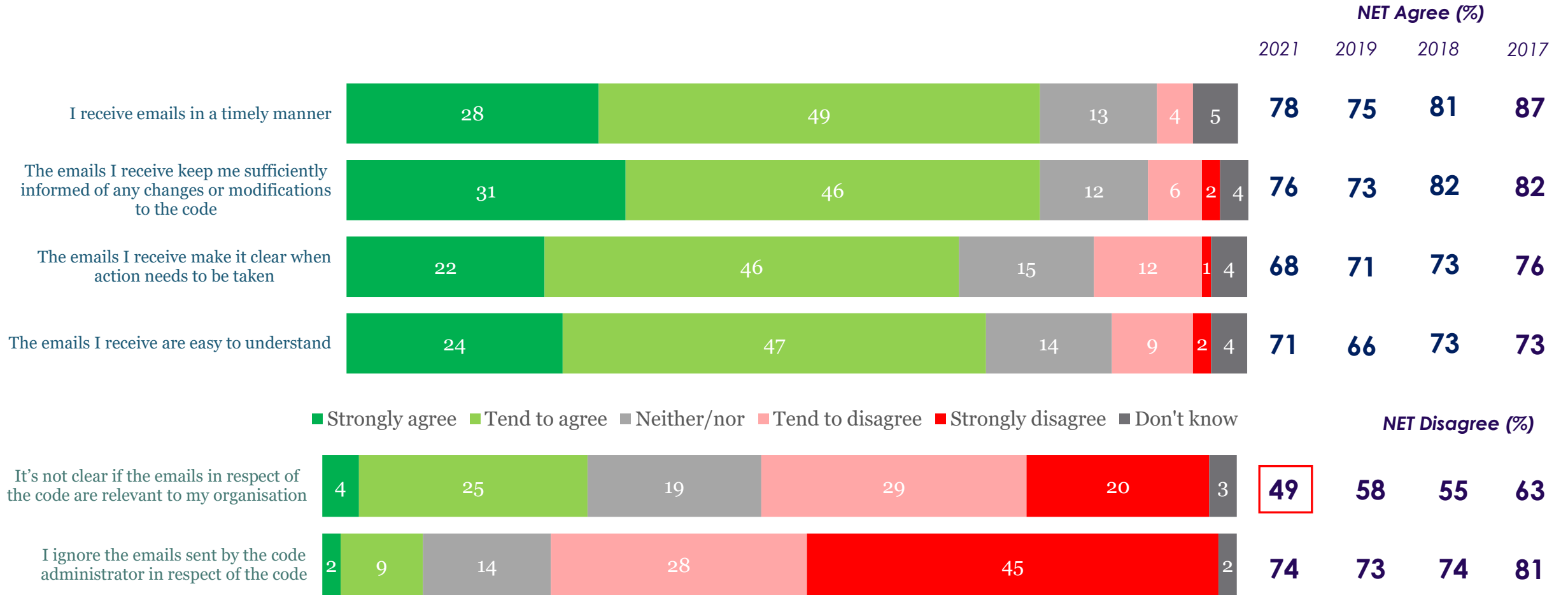
In Detail

Perceptions of direct services



Email

- EMAIL COMMUNICATIONS ARE GENERALLY RATED POSITIVELY – HOWEVER THERE IS A CONCERN OVER WHETHER EMAILS ARE RELEVANT TO A SPECIFIC ORGANISATION



• Q19. Email - To what extent do you agree or disagree with the following in relation to the <code>? Base: All responses for those getting information from code administrator by email (251)

□ Significantly lower/higher vs. 2019

Email continues to be a key communications tool

Email communications are largely seen as being sent through at right frequency. However, as with the quantitative research this is not the case for all.

Many find it easy to determine whether they are of relevance or not, with clear subject headings and headers within the body of the emails.

“They usually start the email saying it is a vote or that it is setting up a working group so it is pretty obvious to me what it is about”

“Email bulletins are great”

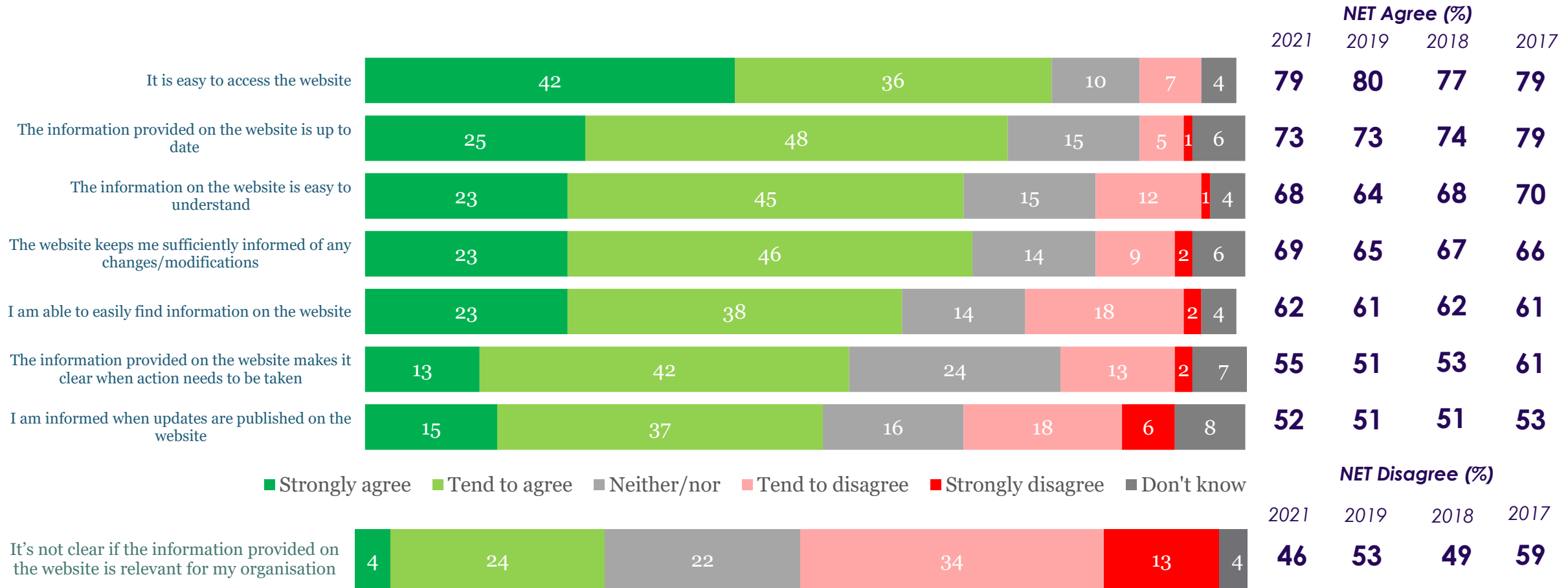
“I get a lot of comms on both codes. It's about the right frequency and you need it to understand what's happening”

“Unless you know the [code] inside and out it's hard to gauge [what is relevant], we're a development company and a lot of the emails are operational”

“They have a weekly newsletter which only highlights what they want to tell us but it's not comprehensive, so other things you hear through the grapevine. It tends not to be the case with code changes, they do tell you about those, but wider initiatives seems to have a smaller circulation list. Also weekly is not regular enough, sometimes you need to know on the day if something is happening”

Websites

- PERCEPTIONS OF WEBSITES CONTINUE TO BE VARIED. BEING INFORMED WHEN UPDATES ARE PUBLISHED AND EASE OF FINDING INFORMATION RECEIVE LOWER LEVELS OF POSITIVITY



Q20. Website - To what extent do you agree or disagree with the following in relation to the <code/codes>? Base: All responses for those using code administrator website (182)

Websites are generally well rated but digitalisation is key

Similarly to emails, code websites are broadly viewed as delivering what is needed. Some are viewed as better than others but now they are all seen as providing a decent level of information, especially those which have moved to digitalisation of the code and provide livechat functions.

“They are the main source of information, I couldn't do my job without them”

“Digitalisation has made the navigation improve and being able to cross-reference is really helpful”

Podcasts that some were providing as short summaries were valued by those who had accessed them

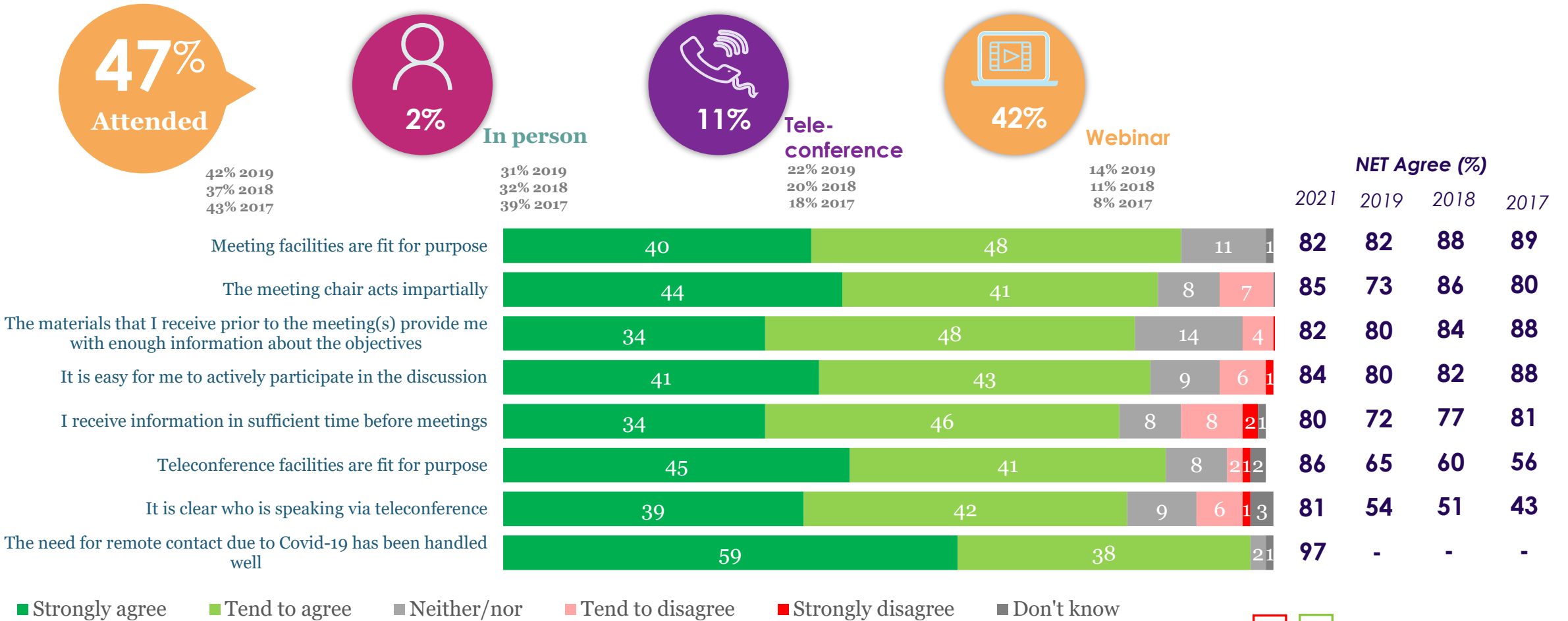
“[The CA] do these short summaries they call podcasts which are really helpful”

- Digitalisation of the codes is the key thing which is consistently raised. Where codes are digitalised it enables customers to search and find what they need. Where codes are not digitalised, there is frustration that it can be hard to find what is needed. *“[CA] could be simplified even just the [Code] document is loads of separate documents in different places. They have got a good search option but you can't rely on it”*

“even though it [CA] is the code I know best, it is a more difficult website, you can't really word search, it just gives random results”

Meetings

- PERCEPTIONS OF MEETINGS HAVE SHOWN A NUMBER OF IMPROVEMENTS SINCE 2019



• Q21/Q21b. Have you attended a meeting or workshop about the code in the last 12 months? Base: All responses for those involved with the code (296)

• Q22. Meetings - To what extent do you agree or disagree with the following in relation to the <code/codes>? Base: All responses for those attending meetings arranged by code administrator (138)

Significantly lower/higher vs. 2019

The switch to remote meetings was well handled

Switching to remote meetings via Teams is the key thing which was identified as a change during Covid and this was overwhelmingly viewed as a positive experience. It enabled people to attend multiple meetings in one day rather than sacrificing a day to attend a face to face meeting in London or Warwick. Whereas previously people could dial in as well as attend a meeting this mixed attendance was not seen positively as those on the phone seem to miss out. Therefore, most believe remote sessions should continue with the option for face-to-face meetings every so often to enable networking.

“Moving more towards a digital domain through MS Teams and Zoom we've opened it up to greater participation”

“All transitioned to online smoothly and dialling in to meetings was more straightforward and we could attend multiple workgroups within one day”

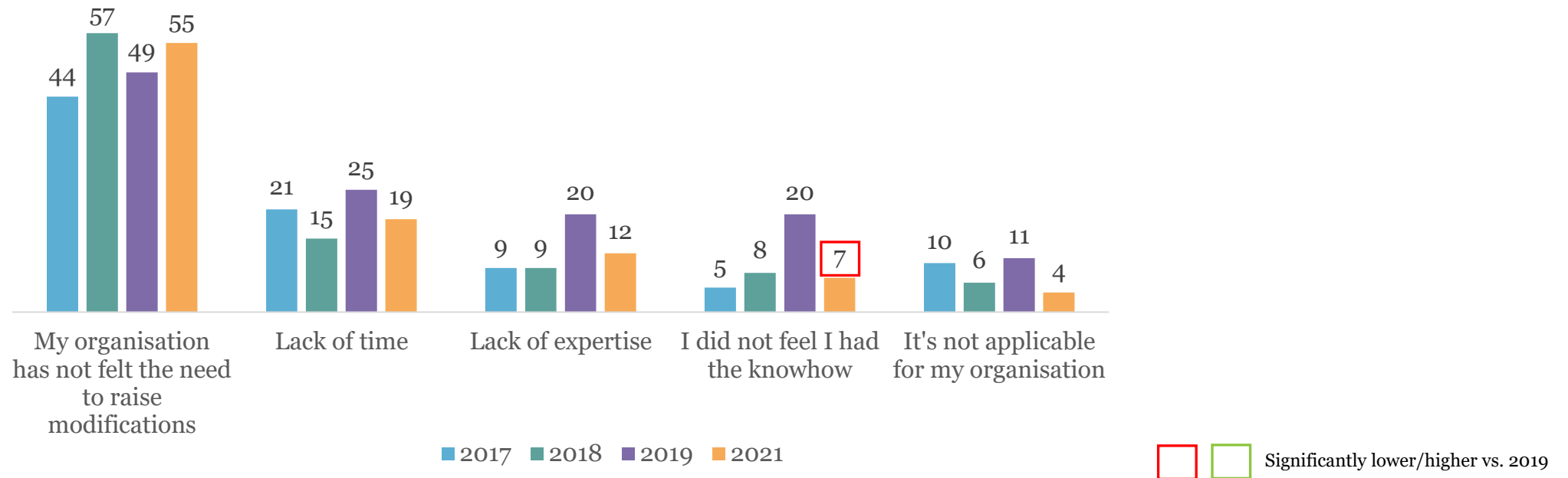
“Teams has worked brilliantly, you can have video on or off but there's been no difference in quality of meeting without the effort of travelling but sometimes would be nice to have that face to face contact when trying to build relationships”

“Where it used to be a mix of face-to-face and some people dialling in it didn't work, the meeting is where the dynamic is, that's where the chair is and so you want to be there in person and that can be a barrier for smaller entrants as 1-3 hour meeting is all day out of the office”

Raising modifications

- FOUR IN FIVE (82%) HAVE NOT RAISED A MODIFICATION FOR ANY CODE THEY INTERACT WITH. THE MAIN REASONS FOR NOT RAISING MODIFICATIONS INCLUDE;

Reasons for not raising modifications (%)

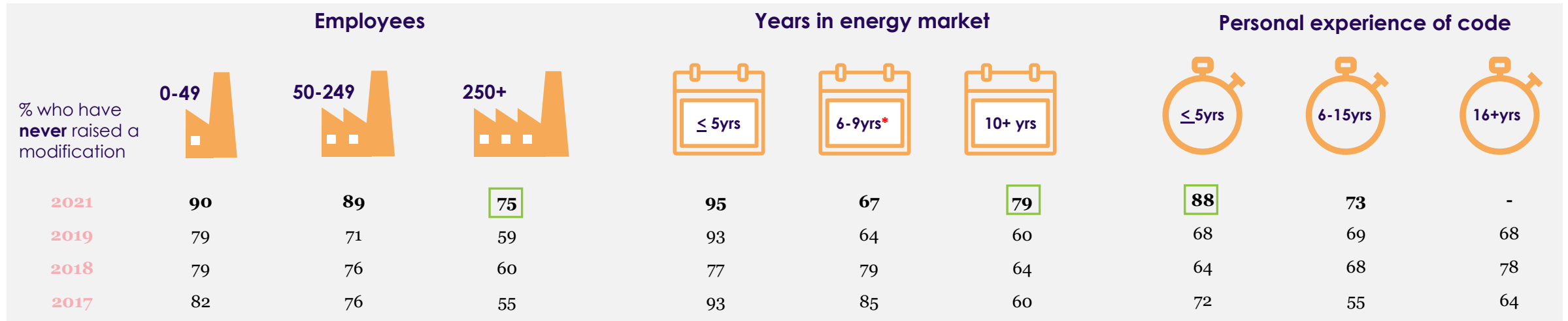


• Q23/23b & Q26. Have you been responsible for raising any modifications in respect of the <code> within the last 12 months, including where the modification was not approved? Base: All respondents (2021 – 296, 2019 - 203, 2018 – 216, 2017 - 204)

• Q27. Why have you not raised any modifications over the last year? Base: All who have not raised any modifications (2021 – 74, 2019 – 133, 2018 – 143, 2017 - 135)

Raising modifications

- MOST GROUPS HAVE SEEN AN INCREASE IN THE PROPORTION SAYING THEY NEVER RAISE MODIFICATIONS (A NUMBER OF THESE INCREASES ARE STATISTICALLY SIGNIFICANT)



- Bigger and more established businesses are more likely to have raised modifications.

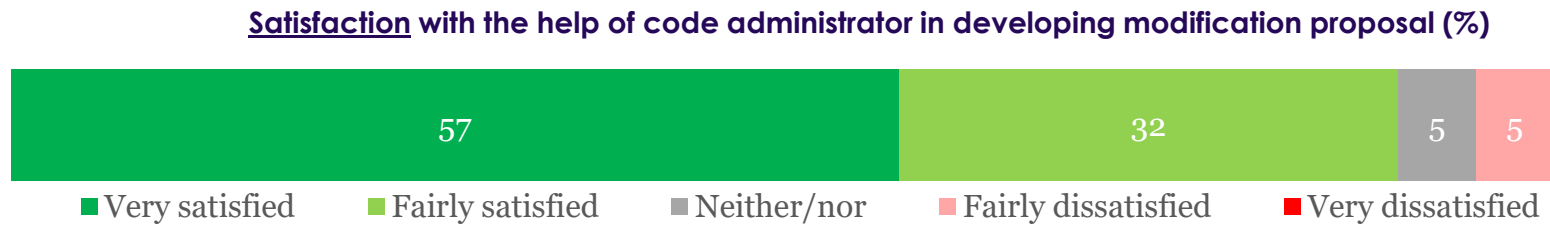
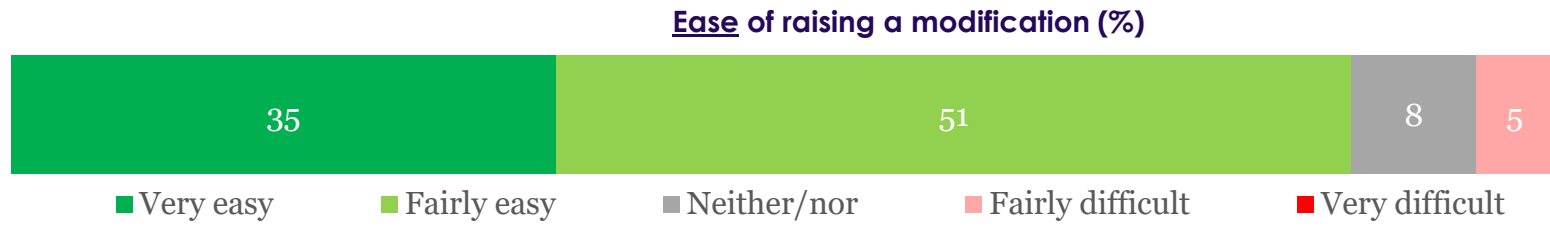
Significantly lower/higher vs. 2019

• Q23/23b & Q26. Have you been responsible for raising any modifications in respect of the <code> within the last 12 months, including where the modification was not approved? Base: All respondents (2021 – 296, 2019 – 203, 2018 – 216, 2017 – 204)

*small base size
 **very small base size } interpret with caution

Perception of modifications process

- RAISING A MODIFICATION IS GENERALLY CONSIDERED EASY BY THOSE WHO HAVE GONE THROUGH THE PROCESS.



NET Easy (%)

Year	2021	2019	2018	2017
Value	86	79	89	85

NET Satisfied (%)

Year	2021	2019	2018	2017
Value	89	79	81	85

Legend: Significantly lower vs. 2019; Significantly higher vs. 2019

• Q23/Q23b. Have you been responsible for raising any modifications in respect of the code within the last 12 months? Base: All responses for those involved with the code (296)
 • Q24/Q24b. And how easy or difficult was the process of raising a modification in respect of the code? Base: All responses for those raising modifications in respect of the code within the last 12 months (37)
 • Q25/Q25b. How satisfied were you with the help the code administrator gave in the development of your modification proposal? Base: All responses for those raising modifications in respect of the code within the last 12 months (37)

Experience of raising modifications

Experiences of raising mods varies considerably dependent on which code it is for. With the difference in how codes are run, those which have more of a code support manager, rather than those with an administrative role, are seen as offering better support which is valued such as actually helping to draft the modification with the party and having CA staff who are more knowledgeable.

“They’re all painful and time consuming to the point of infinity”

“Mods can take too long, some of ours have been going for 4 years”

“The support I received was second to none, they were really good and patient particularly with completion of the form, what goes where and who to talk with”

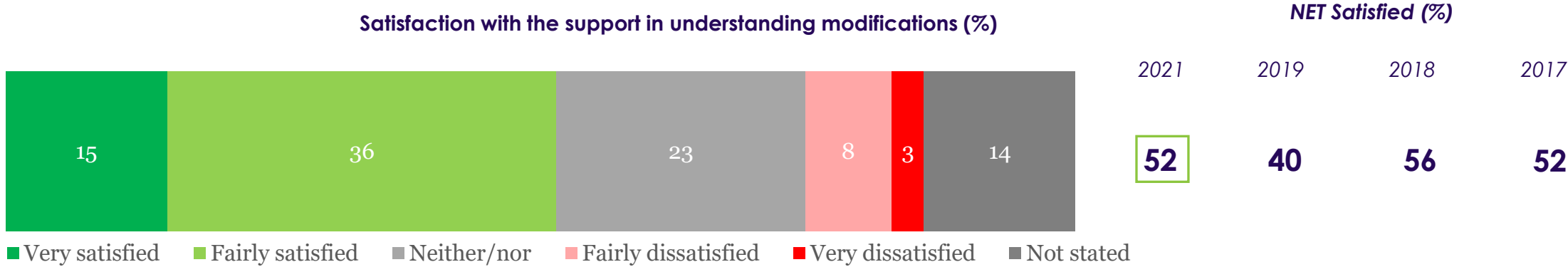
“We had a non-contentious mod, more of an admin type mod, the help and support from the TCMF and then the panel was really helpful”

“It can take a long time for changes to go through the modification process and sometimes there are too many alternatives presented so you can have hundreds of pages of a document with an alternative just tweaking a bit of wording but there should be a limit to how many alternates there are”

“I drafted the change proposal and shared it with [the CA] and they reviewed it and added, edited what they could help with”

Understanding modifications

- SATISFACTION WITH THE SUPPORT PROVIDED AROUND UNDERSTANDING MODIFICATIONS HAS IMPROVED SIGNIFICANTLY COMPARED TO 2019



By code

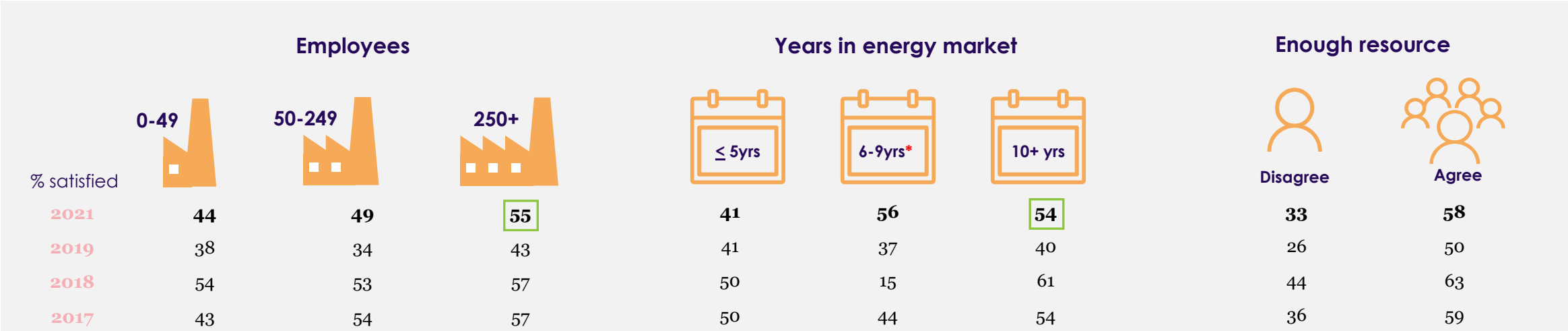
		BSC	CUSC	Dcode*	DCUSA	Grid Code	IGT UNC*	MRA*	SEC	SPAA*	STC*	UNC*
Net satisfied	%	65	47	46	63	53	67	50	43	42	58	37
Net dissatisfied	%	6	19	11	3	10	7	11	20	8	-	26

Significantly lower/higher vs. 2019
*small base size
**very small base size } interpret with caution

Q28. How satisfied were you with the support the code administrator gave you in helping you to understand what modifications raised by others mean for your organisation? Base: All responses for those involved with the code (296)

Understanding modifications

- UNDERSTANDING OF MODIFICATIONS HAS IMPROVED ACROSS ALL GROUPS EXCEPT FOR THOSE WITH THE LEAST EXPERIENCE OF THE ENERGY MARKET



- Individuals from organisations lacking the resource to deal with codes report the lowest levels of satisfaction with the support they receive to help them understand modifications – although satisfaction has improved since 2019

Q28. How satisfied were you with the support the code administrator gave you in helping you to understand what modifications raised by others mean for your organisation? Base: All responses for those involved with the code (296)

Significantly lower/higher vs. 2019
*small base size
**very small base size } interpret with caution

Understanding modifications process

Similarly to raising mods, the ability to understand changes from others is dependent on the support and communications from the different CAs, how well the mod has been put together and the experience of the customer.

“They do try and produce a spreadsheet of changes I think through the CACOP so I think it has got better”

“I’ve missed gaining some context to changes on at least 2 occasions and then when it comes to the consultation stage, it might be the first time actually seeing it.”

“Sometimes documents are not considerate of new kids status and use very technical language”

“They’re all different in the way they’re administered and how their change process works, you have to relearn it for each”

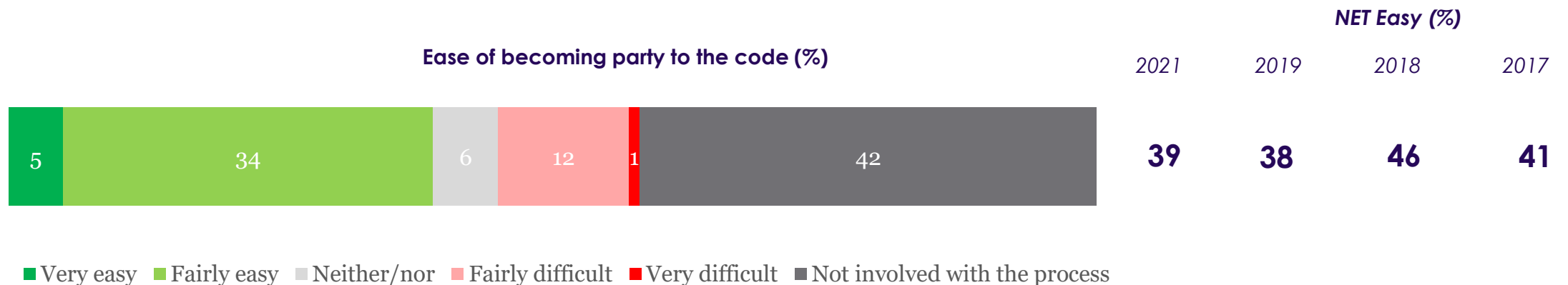
Accession process

- SATISFACTION WITH EASE OF THE ACCESSION (FOR THOSE THAT HAVE BEEN THROUGH THE PROCESS IN THE PAST FIVE YEARS) REMAINS FAIRLY STABLE OVER TIME (ALTHOUGH DID RECEIVE A HIGHER RATING IN 2018)

35%

employed by an organisation that became party to, or began the process to become party to the code in the last five years

“Accession in itself is nothing difficult but becoming qualified is more complex. Under the [CA] it takes 9-12 months before you become a qualified supplier”



□ □ Significantly lower/higher vs. 2019

- Q8/Q8b. Has your organisation become party to or begun the process to become party to the code in the last five years? Base: All responses for those involved with the code EXCLUDING DCode and Grid Code (223)
- Q9/Q9b. And still thinking about your current role, how easy or difficult did you find the process of becoming party to the <code>? All responses for those who have become party or begun the process to become party to the <code> in the last five years (77)

Attitudes towards the Retail Energy Code (REC)

Although the REC did not come into force until 1 September 2021, customers did have an opinion on the process and set up of the REC.

Many were optimistic about the REC and its administration and were very positive towards some of its key aims such as digitalisation of the code; cross-code management; and consolidation of the codes.

“We should learn from REC and if digitalisation works, we should do more”

“I hope the REC will fix some of these issues. I think it'll help bring things together”

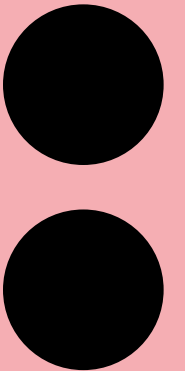
There were however some who felt the lead-up to launch has not been handled optimally. There is a belief that there were too many emails sent out particularly as they were focussed on the transition and more superfluous aspects such as the look and feel of the portal, the digitalisation of the code rather than the content of the code and how to comply with it once in place. One participant also stated that the portal was not open until 1 September and cannot understand the logic of that.

“It's all so focussed on the centralised switching, we use the MRA operational guides all the time, I've looked at the REC website and I don't know what it will provide”

“As a user of the REC, the thing that really matters is the content and the text and how that impacts my organisation. I would have liked Ofgem to push the Code Administrator to focus on that”

“I want to know how our obligations might change, there has been no session on this but as a code user I have to read through literally thousands of pages and see what is different to previous codes which is very inefficient...what we need is a session with an expert on the actual content of the code”

Conclusions and recommendations



Suggested improvements

- WHEN ASKED TO SUGGEST ONE SPECIFIC IMPROVEMENT TO THE SERVICE PROVIDED THERE WERE A NUMBER OF AREAS IDENTIFIED FOR DEVELOPMENT

Scheduling of meetings need to improve, be clearer about priorities of modification levels

Dedicated Account Manager

Better chairing of meetings to keep to time and avoid unnecessary discussions

Consistency of implementation across DNOs

Clear guidance on raising a modification

Continue remote meetings - it has increased my participation as a result

Guides for each party type that set out which bits relate to them

Visibility for the prioritization of modification work

Make the summary of Mods written in clear English with clarity of what the Mod will change and what the perceived defect is that is being addressed.

The level of service delivered is appropriate for our organisation

Provide simple information about which category a Modification is relevant to

Live Chat option

More digitisation

Change website to ensure information is easy to find on the website - updates are made but information is not always kept in the most logical of locations on the website. Website is not easily searchable. It is generally not very user-friendly to navigate through mod workstream meetings/ change management meetings and related materials.

• Q29. If you could make one improvement to the service provided by the code administrator in relation to the <code/codes> what would it be? Base: All responses for those involved with the code (296)

Suggested improvements

Many of the customers say that they are satisfied with the current service provision from CAs especially given the complexity of the system. However, whether satisfied or not most can suggest areas where they think there is possibility for improvement.

- Funding – making funding model more consistent across the codes so there is similarity of budgets and resources
- Move to a Code Manager system rather than Code Administrator – *“a Code Manager leads on change and does more of the heavy lifting, a CA's scope is limited because it's funded to be CA and not a Code Manager, they have to rely on industry”*
- Induction to the codes, CAs and the processes for those new to the market.
“I would have liked, as a start-up, more of a welcome pack from Code Administrators but I had to go out to each of them and say here we are. Potentially the Code Administrators could go through who are the suppliers operating in England and ensure there is contact with each supplier”
“Workshops for those new to the code to have a bit of an initiation on CUSC pitched at a level which doesn't overwhelm them”
- Increased cross-code working
- Increased knowledge of staff dealing with the codes
- Use more layman's language than all of the legal jargon
- Quantify and explain the benefits of a mod to industry
- Invite and include more industry representatives in working groups
- Digitisation of the codes so that they are easier to navigate *“Digitisation of the codes, will be interesting to see how REC works in practise so rather than having pdfs of docs, digital copies which takes you to definitions of terms and cross references to other codes if they interact with each other”*
- Remote working has worked well and people would like this to continue but not to the detriment of the networking opportunity that face to face meetings have. Some propose that remote meetings should continue so that all parties are in the same position to engage but with ad hoc 6 monthly face-to-face opportunities.

Conclusions

2021 has seen improvements in many of the factors that declined in 2019 and most users remain broadly satisfied with their experiences

One area that has decreased however relates to the relevance of information (and the clarity of whether email communication is relevant to specific businesses/ users)

It is clear that performance improves based on the level of resource a business has and experience of dealing with codes

Providing a more standardised experience across CAs would be of benefit to those who work with multiple CA's – there is an expectation for Code Administration Code of Practice involvement here

Modifications are more likely to come from bigger and more established users

Recommendations



Look at the on-boarding process – how can users get ‘up to speed’ more quickly – potentially using more straightforward language and reduce reliance on understanding of technical jargon



Increase the level of digitisation on all websites/ documents to help users find relevant information to them

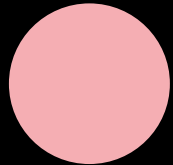


Ensure email communications have relevant headings/ are easy to navigate/ clear which user types they are relevant to – if ‘smarter’ personalised communication is possible to target information only where relevant this would be a significant benefit

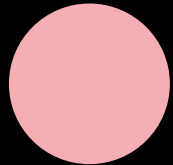


Review cross code working and how CACoP is currently working. This finding/ recommendation from 2019 appears to remain relevant in 2021

Contact :



Steve King - SVP



steve.king@savanta.com

07879 634 601

Sample profile

- THE SAMPLE PROFILE REMAINS FAIRLY CONSISTENT YEAR ON YEAR MEANING DATA FLUCTUATIONS ARE NOT LIKELY TO BE A RESULT OF SAMPLE EFFECT

%		2017	2018	2019	2021
Number of employees	0-49	27	18	24	26
	50-249	17	16	15	15
	250+	53	62	60	56
Years in Energy market	>5 years	13	16	15	22
	6-9 years	10	6	7	7
	10+ years	76	76	78	71
Resource available	% Agree	64	70	63	69
	% Disagree	25	19	25	18