Code administrators survey

Report

ESOMAR member — MRS Evidence Matters™ Company Partner — IQCS Interviewer Quality Control Scheme

ISO 27001 INFORMATION SECURITY MANAGEMENT SYSTEMS — UKAS MANAGEMENT SYSTEMS 036 — Cert No. 0531

ISO 20252 MARKET RESEARCH SERVICES — UKAS PRODUCT CERTIFICATION 036 — Cert. No. 0432

future thinking

ofgem

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Executive summary

01 The industry is complex and therefore the codes and their requirements are viewed as necessarily stringent

02 Satisfaction is generally high in regards to key aspects of code administrator services

03 There is a desire for code information to be more accessible and centralised

04 Organisations would like code administrators to be more proactive in helping them to digest and interpret the codes

05 Size of company and length of time in the market has an impact on perceptions of the service and processes

Objectives & 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 intended to evaluate the service provided by code administrators in accordance with the principles of the Code Administration Code of Practice (CACoP) which aims to align processes across the industry codes and identify areas of best practice.

The study was not intended to take account of the relative funding of the code administrators, or whether they offer value for money.

Specifically, the survey has been developed to:

Identify

Organisations' interaction with codes and CAs:
- Awareness of CA responsibilities
- Confidence in dealing with codes
- Expectations of the service which code administrators should be providing

Measure   2

Overall performance of CA on key metrics:
- Overall satisfaction
- Support
- Communications
- Modification process

Assess   3

Specific aspects of service delivery:
- Email
- Websites
- Meetings
- Accession process

Method

Mixed mode programme of research among organisations interacting with codes

Framing interviews to inform questionnaire design

15 depth interviews

Fieldwork date:
06-21 Oct 2016

Core survey to measure experience and performance of CAs
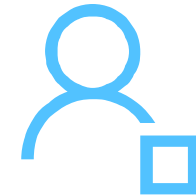
204 surveys in total

163 telephone participants

41 online participants

Fieldwork date:
22 Nov 2016 –
24 Jan 2017

Fieldwork date:
13-24 Jan 2017

Follow-up survey to get a deeper understanding of drivers satisfaction/dissatisfaction

22 follow-up depth interviews

Fieldwork date:
27 Jan – 13 Feb 2017

Online and telephone approach

- Code administrators store their data in different ways with some unable to provide telephone data for all organisations that interact with their code
  - This meant that to represent the views of organisations interacting with codes, a multi-mode study of **telephone** and **online** approaches was required

- 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 responses rather than citing dissatisfaction

- 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

- Data has therefore been combined with the understanding that there is an element of fluidity in satisfied to neutral ratings

- **However**, it is important to note that this does not impact the overall message and conclusions arising from the research

Interviews achieved

- Many organisations interact with more than one code and it was considered too onerous for them to answer the survey on every relevant code

- They were therefore 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)

- 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

- A total of 204 interviews were completed

Interviews achieved by code:

| BSC	CUSC	DCode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC	UNC
57	38	13	29	27	34	61	34	30	11	39

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

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 among organisations

- Typically, smaller organisations reported greater resource pressure, which can impact their interaction with the code

Interviews achieved by type:

Employees

0-49	50-249	250+

| 56 | 34 | 108 |

Years in energy market

≤ 5yrs	6-9yrs	10+ yrs

| 27 | 20 | 156 |
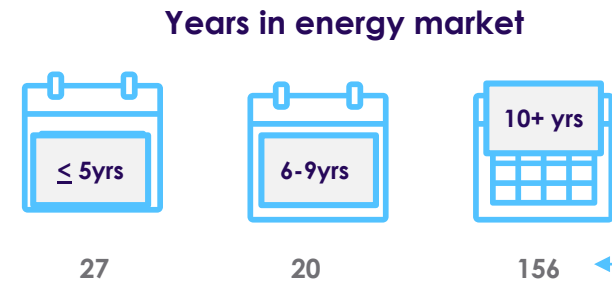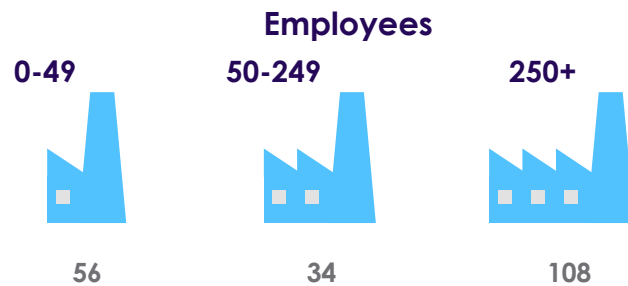
These base sizes increase to robust levels on KPIs as these are analysed on all responses (some respondents answered for more than one code)

- 66% of companies with 0-49 employees (and 67% of those with 0-9 employees) have been operating for 6+ years so we are showing sub-group data for both company size and length of experience as 'small company' does not necessarily mean 'new company'

Industry context
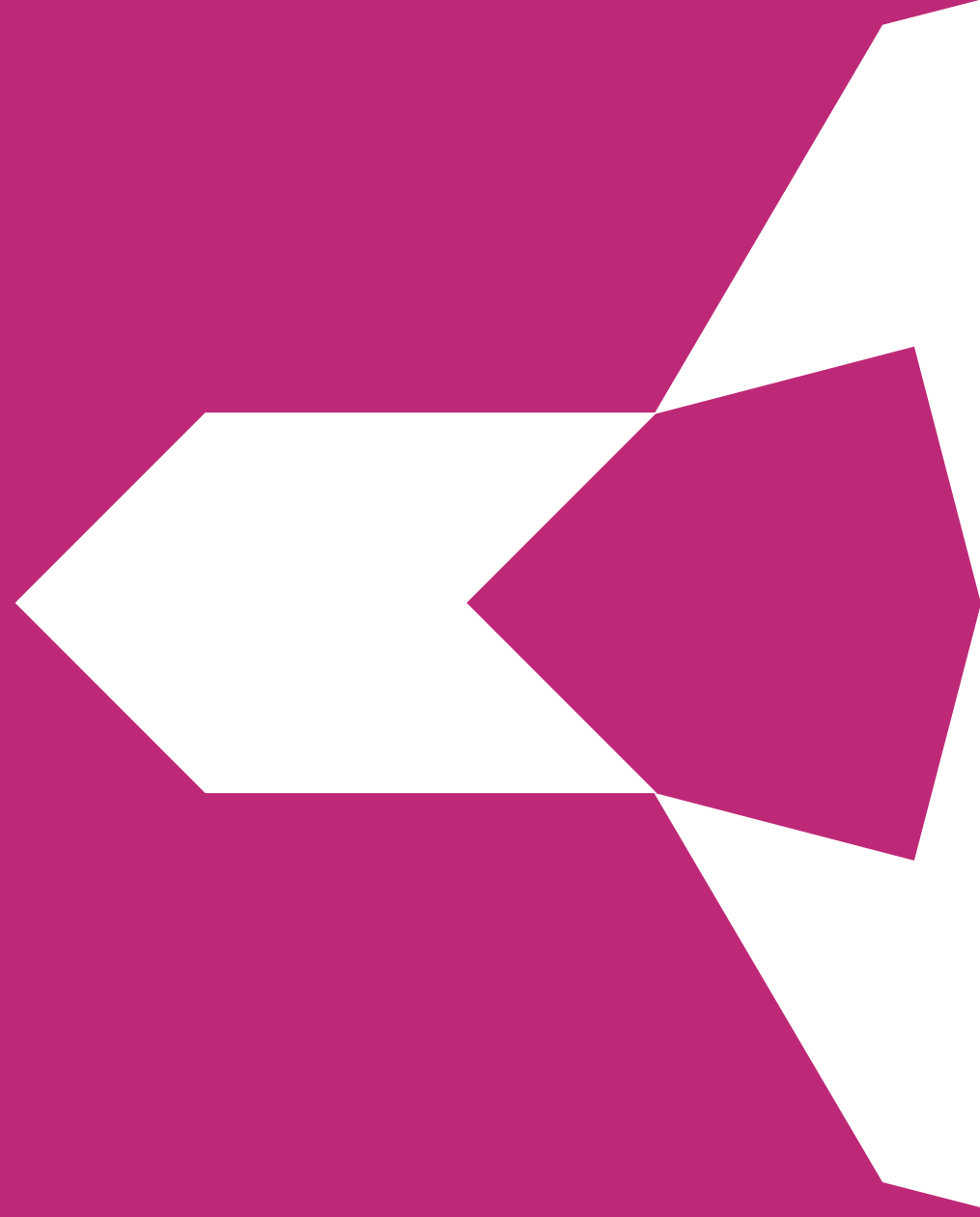
The energy industry is in transition

Organisations recognise that changes occurring within the market will have an impact on how they interact with codes

Core industry changes highlighted are:

- Recent creation of the Department for Business, Energy and Industrial Strategy (BEIS) in mid-2016

- Requirement for codes to be in line with European legislation

- Relatively new codes (notably the SEC)

- Prevalence of new entrants into the market

- Attempts to streamline processes, such as Code Administrators Code of Practice

- Changes to the governance arrangements of National Grid's remit in respect of the Grid Code

Code administrators perceived as performing well despite external challenges

External factors influencing performance ratings given to code administrators in relation to codes

"The energy market is in a unique position at the moment due to the amount of change going on. There is a huge amount going on at the moment, which consumers might not appreciate."

"There is currently a lot of change happening every year. It can be a hindrance to a small company with a small budget."

Codes are complex and typically very different

Codes are perceived as inherently difficult to navigate with some more technical than others

While the environment is challenging:

- Organisations do not expect the governance to be less stringent

- There is a belief that complexities associated with an individual code impacts the way each code administrator operates

- Organisations generally interact with several codes and have to be familiar with both governance and operational aspects of each

There are some operational aspects that could be reviewed:

- However each one operates in a 'silo' and the impact of changes is not articulated at an overall level

- There is a belief that operational aspects of codes could be simplified which would greatly benefit new entrants and small businesses

"The code administrators are doing the best they can with the rule book they have."

Belief that interventions could be put in place to improve the market

Organisations feel that more could be done centrally to shape and consolidate the energy market

Ofgem is perceived as adding to some of the complications
- Some feel the market is getting more complex and there are occasions when Ofgem can add to the complications of processes associated with the codes
- Lack of clarity for organisations on where responsibilities lie
- SEC – new code, changes taking a long time to be pushed through because of BEIS's role in the process etc.

Organisations would like greater coordination within the energy market
- Greater code coordination
- Accession process (rather than having to provide the same information to each code administrator)
- Ability to trust impartiality of a code administrator when active in the market

There are some improvements that are acknowledged
- Good at encouraging new entrants and smaller companies

Results suggest that improvements could be coordinated centrally

Key findings

Key

Data presentation

All data are 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 organisations could respond in relation to up to 2 codes)

Statistical difference between sub samples

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

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

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

Organisation profiling
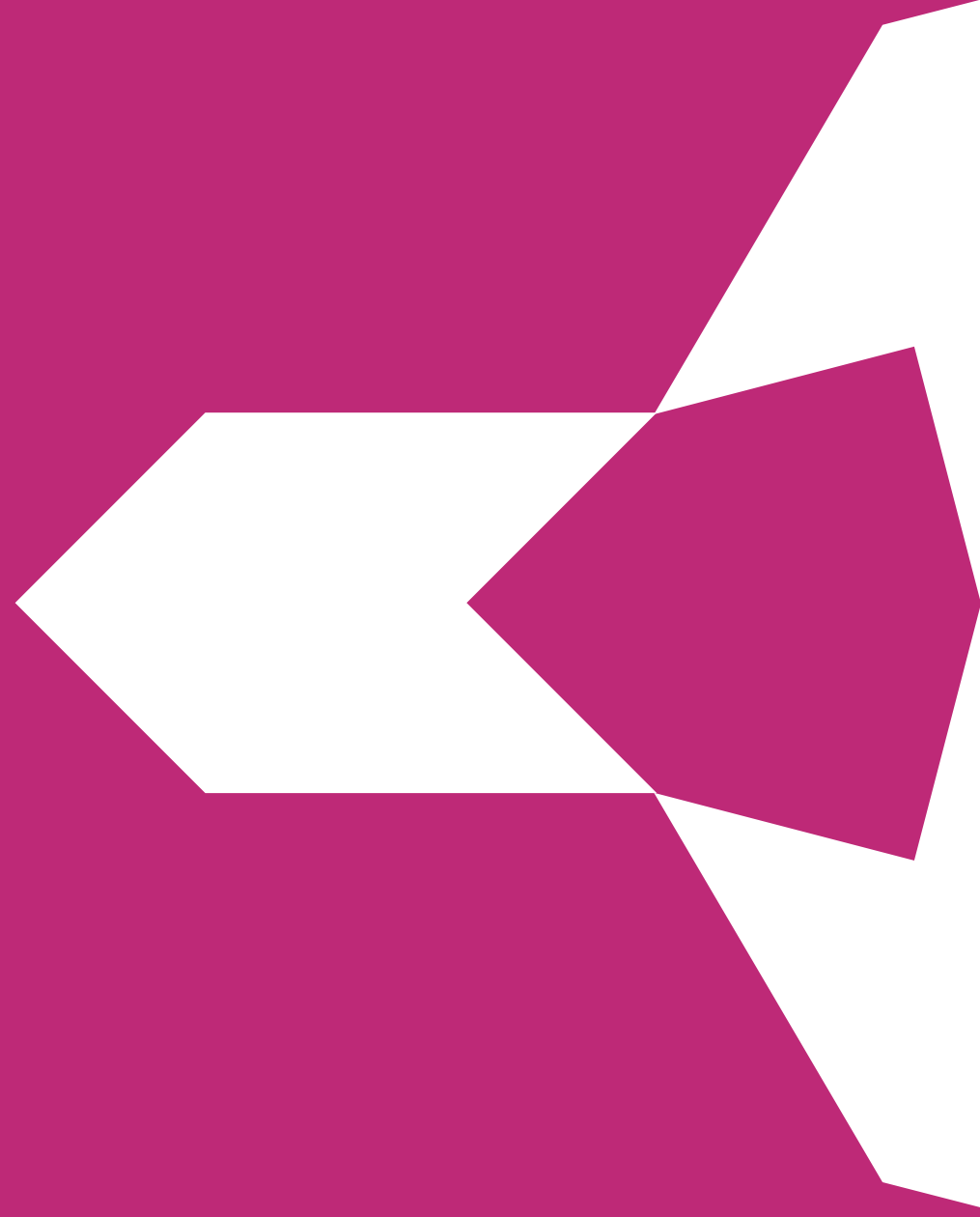
Expertise and resource

While organisations feel they have sufficient expertise to deal with codes, availability of resource is more problematic
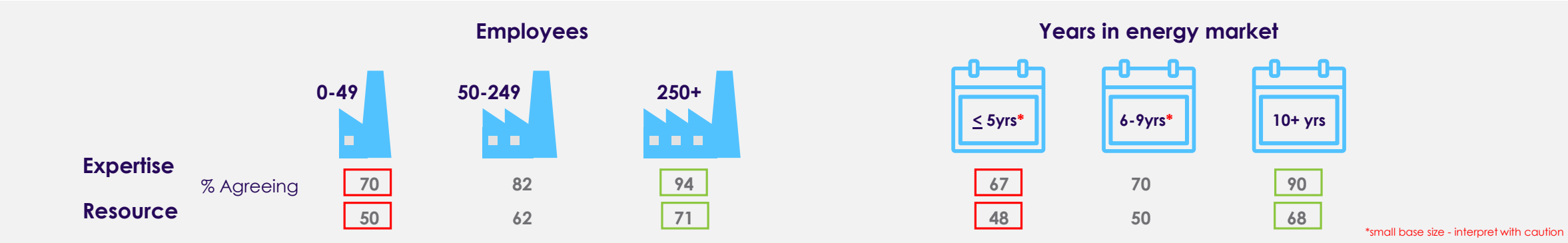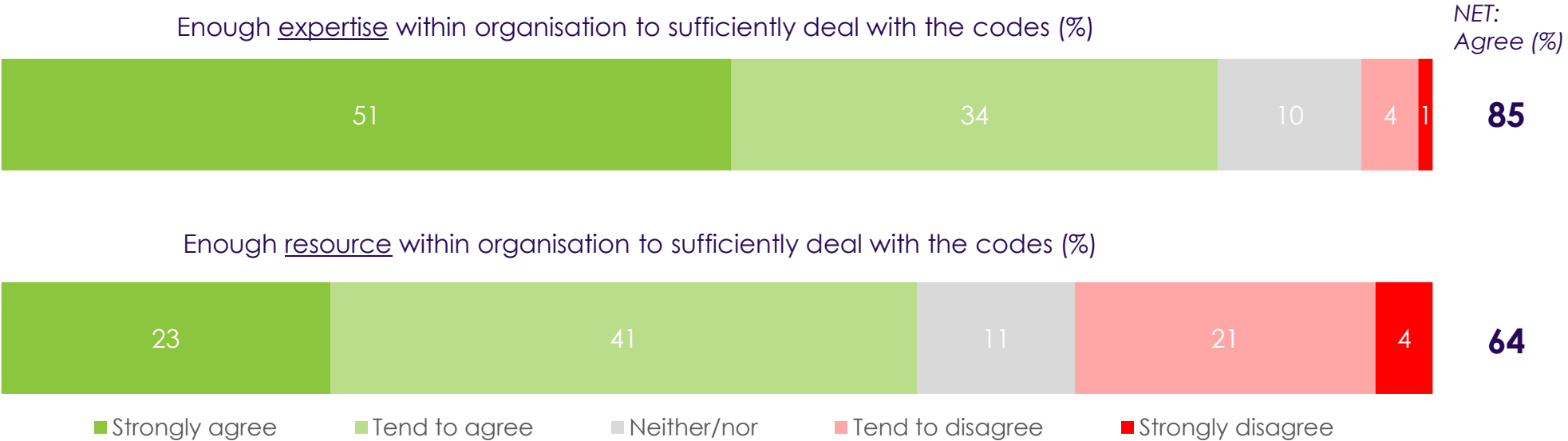
Enough <u>expertise</u> within organisation to sufficiently deal with the codes (%)

NET: Agree (%)

51	34	10	4	1

85

Enough <u>resource</u> within organisation to sufficiently deal with the codes (%)

23	41	11	21	4

64

■ Strongly agree   ■ Tend to agree   ■ Neither/nor   ■ Tend to disagree   ■ Strongly disagree

	Employees				**Years in energy market**		
	0-49	**50-249**	**250+**		**≤ 5yrs***	**6-9yrs***	**10+ yrs**
Expertise % Agreeing	70	82	94		67	70	90
Resource	50	62	71		48	50	68

*small base size - interpret with caution

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 (204)
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 (204)

Expertise and resource

The means to deal with the codes and their requirements is linked to the size and experience of the company

Expertise

The majority of businesses believe that they have enough expertise in house to deal with the codes they interact with

However, the ability to effectively assess expertise can be more difficult for micro organisations as they do not have a benchmark to measure from

Lack of expertise tends to be highlighted as an issue by smaller organisations. However, even those working for larger organisations can sometimes struggle

"There is an assumption that we have loads of resource to respond to every consultation and attend all meetings because we're a big company, but we have to pick our battles because there are a lot of changes going through at the moment."

Resource

Resourcing is more of a challenge for organisations; a quarter indicate they do not have enough resource to sufficiently deal with codes

Those in smaller organisations do not always have the time or budget to deal with code related issues

Organisations acknowledge that code administrators cannot solve all of their problems - they know it is their responsibility to interpret and implement the code - but there is a sense that it is more time consuming than necessary

"A new entrant into the market should get a representative, like an account manager, either free of charge or for a small fee who could say 'These are the changes that will affect you; this is what you need to implement'. There should be a provision written into the industry to help us."

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 (204)
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 (204)

Knowledge of code administrator responsibilities

77% are aware of the CACoP

Knowledge of code administrator responsibilities (%)

NET: Some (%)

A great deal	A fair amount	Not very much	Nothing at all	
25	47	25	3	**72**

■ A great deal   ■ A fair amount   ■ Not very much   ■ Nothing at all

Employees

Years in energy market

Enough resource

% Great deal/fair amount

0-49	50-249	250+	≤ 5yrs*	6-9yrs*	10+ yrs	Disagree	Agree
70	65	74	67	70	73	47	82

small base size - interpret with caution
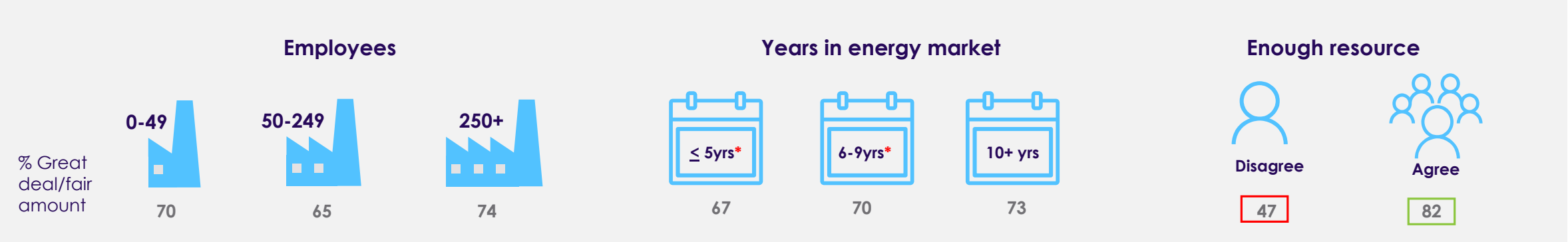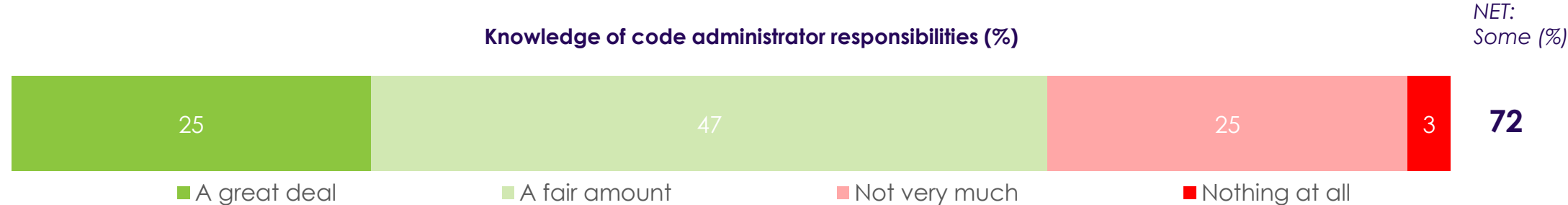
Q3. Are you aware of the Code Administration Code of Practice (CACoP)? Base: All respondents (204)
Q4. Thinking generally, how much do you know about what the responsibilities of your code administrator(s) are? Base: All respondents (204)

Personal interaction with code

On average, individuals have been interacting with codes for around 7 years

90% — I get involved when there are specific issues relating to my area of work

63% — I have strategic overview of the code

55% — I am responsible for managing my organisation's involvement with the code

3% — I am part of team/ have shared responsibility
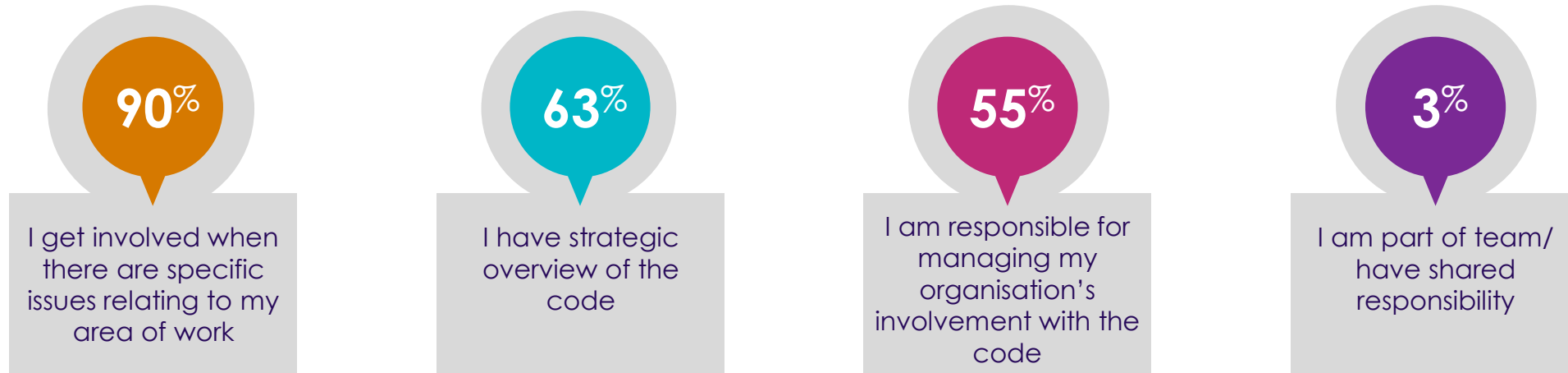
- The survey only includes individuals who are at least occasionally involved with codes

- Individuals tend to have multiple responsibilities in the way they interact with codes, with two thirds saying that they have a strategic overview of the code

Personal interaction with code

Differences between organisations and job roles impact individual perceptions of involvement

- An individual in a **large** organisation may be responsible for interpreting information about one or two codes and 'filtering' it down to the relevant areas of their organisation

- **Micro** and small organisations may have the same individual(s) dealing with all the codes they interact with and their business implications

- Those in **'external' job roles** (e.g. consultants, panel members, industry journalists) usually have different relationships with codes/ code administrators

"

"My understanding of modifications is filtered through to me from the regulations team when they affect my area of business. It would be a lot more difficult without them because everyone in the company would have to stay on top of what's happening, even if changes didn't affect them."

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 (373)
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 (373)

KPIs
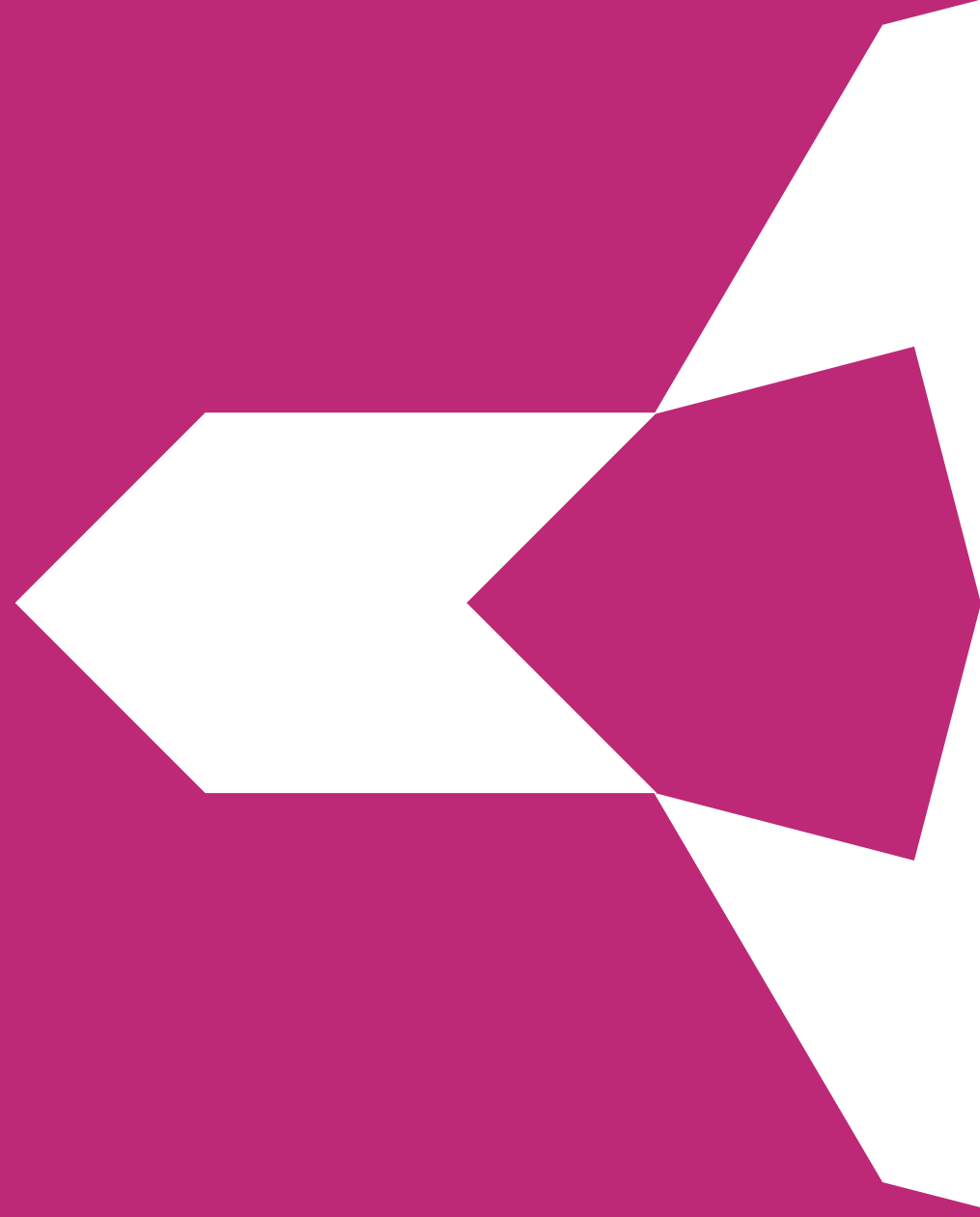
Overall satisfaction

The majority of organisations are satisfied with the service received from code administrators, and among those not satisfied, the perception is neutral rather than negative

Overall satisfaction (%)

NET: Satisfied (%)

23	46	24	6	1

70

■ Very satisfied   ■ Fairly satisfied   ■ Neither/nor   ■ Fairly dissatisfied   ■ Very dissatisfied
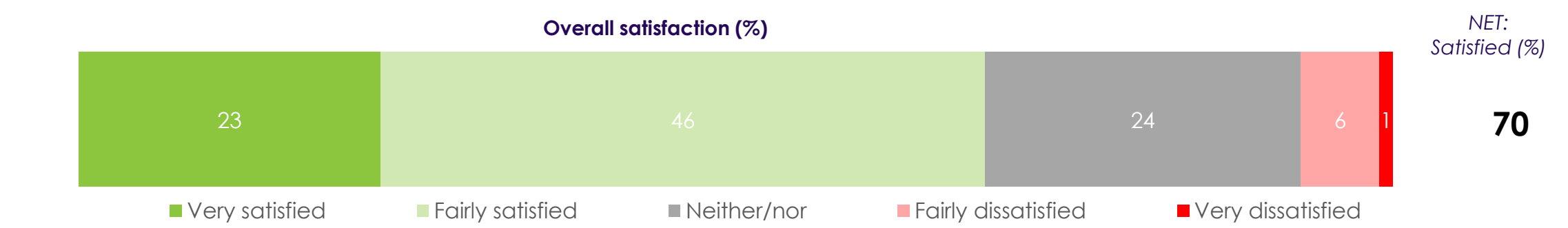
By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	82	47	77	83	59	62	70	71	73	45	77
Net dissatisfied	%	0	11	0	10	7	3	8	12	7	0	5

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

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 (373)

Overall satisfaction

Although satisfaction is strong at an overall level, there are some groups that are less satisfied

Employees			Years in energy market			Involved with code	
0-49	50-249	250+	≤ 5yrs	6-9yrs	10+ yrs	Fairly/occasionally	Very
% satisfied 62	73	73	56	78	72	62	85
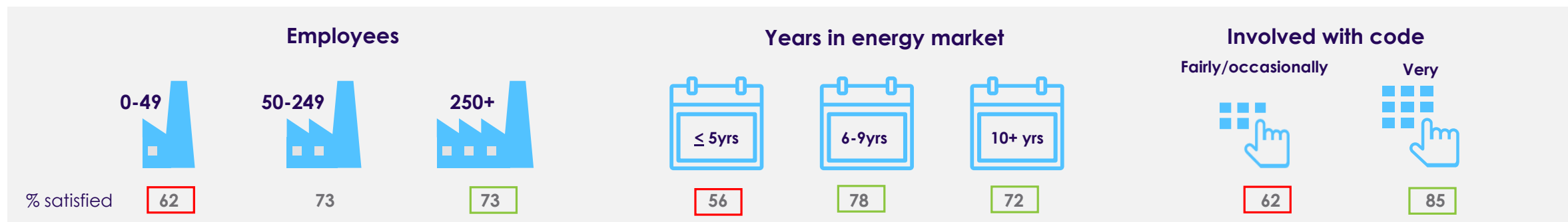
Availability of resource and familiarity with codes strongly influence overall satisfaction:

- Organisations with 0-49 employees give a lower satisfaction rating than those with 250+ employees

- Those who have entered the market within the last five years give the lowest satisfaction rating, with just 56% saying they are satisfied

- Individuals who are fairly or occasionally involved with codes are less satisfied than those who are very involved

Overall satisfaction

Organisations tend to consider a multitude of factors when rating their dealings with code administrators

Organisations recognise the complexity of the system and therefore that regulations need to be stringent and rigorous

There is a general belief that administrators are doing the best they can in what is a complicated and changing market

Those less involved find it more difficult to engage with unknown codes, navigate the system and find the relevant person to speak with

Those with less market experience or resource are more likely to feel unsupported through the processes

"Having codes and licenses is really important. You need a base structure. But if you look at people who are entering the market, they have no influence. They are just following the rule book."

"Code administrators do what they can. It's more like an industry framework issue."

"Sometimes it's just about knowing what help you actually need."

"It's our responsibility, we joined the industry, we understand that we need to be compliant. I am not asking for anything to be watered down, I am just asking for support."

Key driver analysis

Three service aspects have the largest impact on overall satisfaction

Key driver analysis tests the strength of the correlation between ratings of core metrics against perceived level of satisfaction. From this we can derive which factors have the greatest impact on overall attitudes – this is a subconscious measurement rather than a stated level of importance

	Drivers	Importance*	Current rating
1	How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the code?	0.478	73%
2	Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to the code?	0.113	59%
3	How satisfied were you with the support the code administrator gave you in helping you to understand what modifications raised by others mean for you?	0.107	52%

* The importance value will always have a value between -1 and +1, where a large positive correlation means two ratings 'move together' and a negative correlation means the ratings move in the opposite direction.
A correlation of 1 means an exact linear relationship (i.e. everyone gives the same rating for overall satisfaction as for provision of support.)

Key driver analysis

The three key drivers of satisfaction are around support and information. There are opportunities to improve service around two of the three key drivers. With service improvements to these core areas, it is likely that there will be a positive lift in reported overall satisfaction

1 Code administrators are perceived as performing well in the provision of support in interacting with codes. Around three-quarters of organisations are satisfied with this aspect of service. It is important for code administrators to maintain this, as it is key to satisfaction with the overall service

How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the code?

2 On the second most important aspect of service, code administrators are not performing as well. Just 59% of organisations say it is easy to interpret information in relation to the code. This is an aspect of service that is in need of nurturing

Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to the code?

3 The third most important driver of satisfaction also gets a modest rating, with just 52% indicating that they are satisfied with the support given to help understand modifications raised by others. Again, this aspect of service needs attention

How satisfied were you with the support the code administrator gave you in helping you to understand what modifications raised by others mean for you?

Reasons for satisfaction

Three consistent themes connected with attitudes to code administrator services repeatedly arise when respondents are asked for direct feedback on their satisfaction

Factors contributing to a positive opinion of code administrators most commonly include:

01
Direct support from code administrators e.g. Critical Friend, Relationship Managers

"I will usually go straight to them, depending what I need, and if they can't answer they will point me in the right direction."

02
Receiving information which is easily identifiable as relevant to their organisation

"Codes are complicated and could impact so many different areas. You might not know if it isn't clear or doesn't affect your area of responsibility."

03
Easy to navigate websites

"They are slick, their website is easier to navigate. Some code administrator websites are hard to understand for people with no prior knowledge."

Satisfaction with the provision of support

Ratings of code administrator provision of support during interactions are very much in line with overall satisfaction ratings

Satisfaction with the provision of support from the code administrator (%)

NET:
Satisfied (%)

Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied
27	47	19	7	1

73

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied
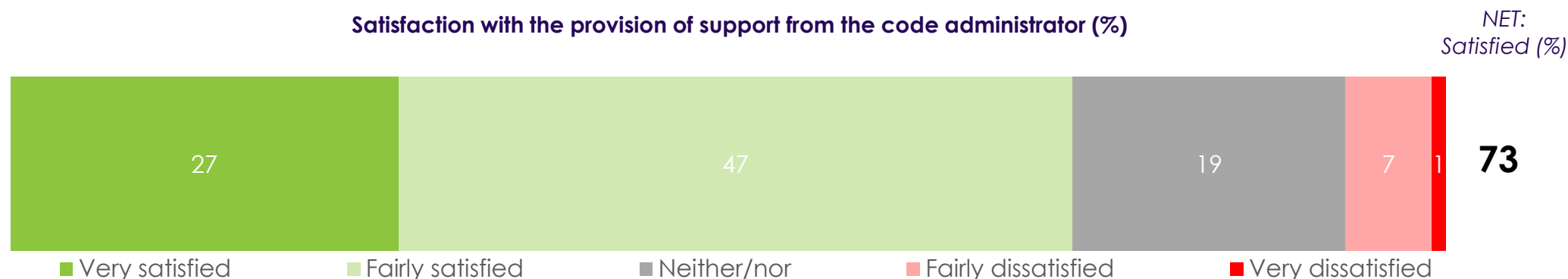
By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	85	54	67	79	67	81	74	62	74	56	81
Net dissatisfied	%	2	11	0	10	8	6	11	9	7	0	8

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

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 (373)

Satisfaction with the provision of support

Provision of support gets a strong rating; however, there are some groups that are less satisfied with this aspect of service

	Employees			Years in energy market			Party to code in last 5 years	
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs**	**10+ yrs**	**Y**	**N**
% satisfied	58	81	79	56	67	77	64	79
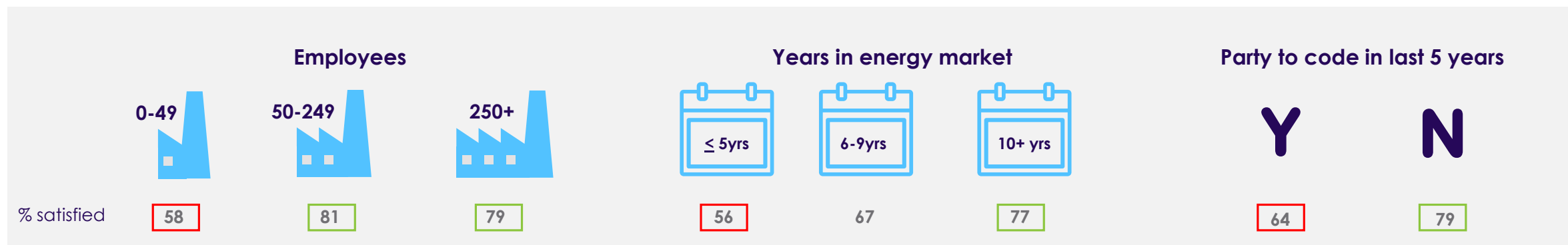
Again, availability of resource and familiarity with codes has an impact on satisfaction:

- Organisations with 0-49 employees are the least likely to be satisfied with provision of support

- Similarly, those who have entered the energy market in the last five years are less likely to be satisfied

- Organisations who became party to the code in the last five years also report lower satisfaction levels

Satisfaction with the provision of support

This is an important aspect of service and organisations acknowledge that it can be challenging for code administrators

- Organisations understand that the level of support required will vary dependent on the code

- They do not want to be bombarded with information or meetings they cannot attend, but they are nevertheless understanding about the need for comprehensive detail and a rigorous consultation process

- Support on particularly complex issues and modifications is appreciated, particularly for smaller organisations and those that are new to the market (roles such as the Critical Friend are recognised for some codes but not all)

"

"Each code administrator operates differently, but this is mainly to do with the code itself. The BSC tends to be very intense, while DCUSA is more of a commercial agreement. The SEC is comparatively new, but SECAS are learning at a very fast rate."

"We are given help but it can be the volume of information that is the problem. It's difficult to know who to ask, and we feel like we are constantly playing catch up."

"It is a lot of information, but if they tried to condense it and something was missed they might get complaints. Code management is difficult; what new entrants need is more advice and help understanding it. There should be a mechanism in place."

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 (373)

32

Satisfaction with support received when requested

A similar level of satisfaction is evident for support received on request

Satisfaction with support received when requested (%)

NET:
Satisfied (%)

| 28 | 44 | 23 | 5 | **72** |

■ Very satisfied ■ Fairly satisfied ■ Neither/nor ■ Fairly dissatisfied ■ Very dissatisfied
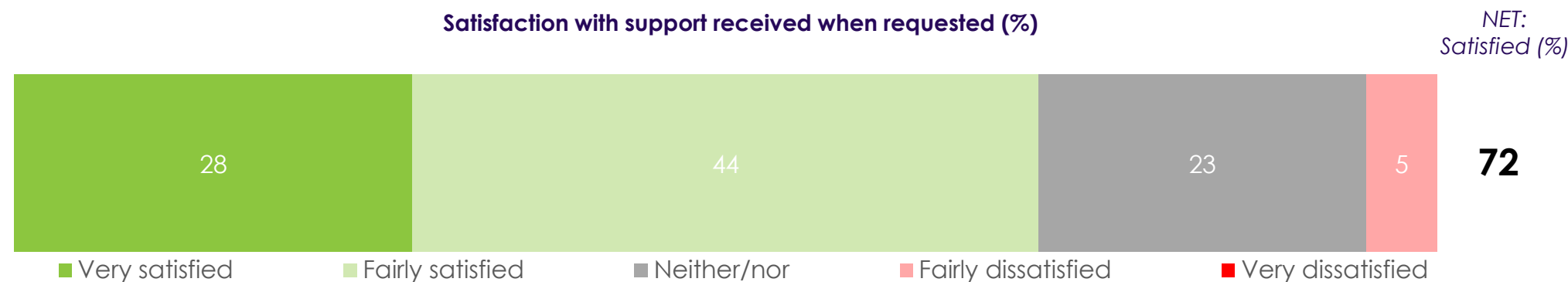
By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	79	56	77	76	69	73	79	66	60	45	82
Net dissatisfied	%	5	9	0	7	4	0	5	9	3	0	5

*small base size
**very small base size

interpret with caution

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 (373)

Satisfaction with support received when requested

The number of employees an organisation has does not impact satisfaction with the support they receive on request

	Employees			**Years in energy market**			**Enough resource**	
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs**	**10+ yrs**	**Disagree**	**Agree**
% satisfied	67	72	75	53	79	74	64	78
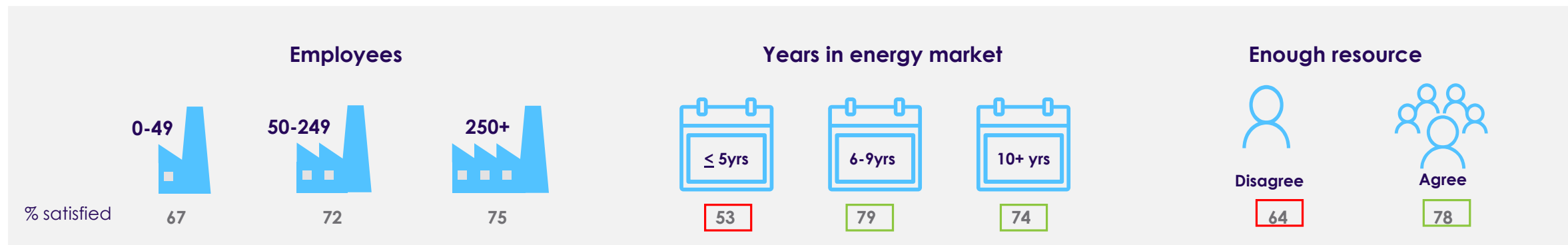
- However, as has been seen with support provided by code administrators, those who have been in the energy market for up to five years tend to be less satisfied with the support received when they request it

- Organisations who indicate that they do not have enough resource to deal with the various aspects of codes tend to be less satisfied with the support they receive when they request it

Satisfaction with support received when requested

Experience of the codes plays the greatest part in influencing perceptions of support received when directly requesting it from a code administrator

- Code administrators do not have a standardised manner of dealing with information requests

- Newer entrants tend to be less clear on the protocols of requesting information support which may impact their satisfaction levels

"
"I have worked with them for a long time so I have a few contacts...It can be a longer process with other codes that I don't deal with as regularly."

"
"I usually respond to emails if I have a question. I always receive a response quickly."

"
"Some are more approachable. If I need something I will just call them. Others are more like auditors - they're only interested in what we need to do to be compliant. We're new, we're trying to get up and running, we can't question everything and that's why it's difficult."

"
"It isn't clear who to contact. It can be hard to find out who the person is that you need to speak to if you haven't spoken to them in the past."

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 (373)

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In detail:

Perceptions of information provision

Perceptions of information provision

Information is a key area for organisations and interpretation is closely correlated with overall satisfaction

- The majority of organisations feel suitably informed about the code they interact with (79%) and they receive information from code administrators through channels which match how they would request it directly

- Organisations indicate that they receive information very regularly (on average 1-2 times per week) and this is viewed as the right frequency by the majority

- Email is the most utilised channel for communicating

- There are however some concerns: the ability to easily interpret information received is seen as easy by just 59%. This aspect of service influences overall satisfaction with the service provided by code administrators

- While there are some concerns around interpretation, the majority still view the information they receive as relevant to them (88%)

- Experience of the code, resource and familiarity are common factors in affecting perceptions of both the code and code administrators

Kept informed about the code

8 in 10 feel they are kept informed about specific codes

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

NET:
Informed (%)

30	49	12	4	5

79

- ■ Very well informed
- ■ Fairly well informed
- ■ Not well informed
- ■ Not at all informed
- ■ Don't know

By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net informed	%	93	68	92	79	81	74	77	74	70	64	87
Net not informed	%	7	18	0	21	19	15	21	21	20	27	10

*small base size
**very small base size

interpret with caution

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 (373)

Kept informed about the code

Larger organisations and those who are more established tend to feel well informed

	Employees			Years in energy market			Enough resource	
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs**	**10+ yrs**	**Disagree**	**Agree**
% informed	71	87	81	64	75	82	67	86
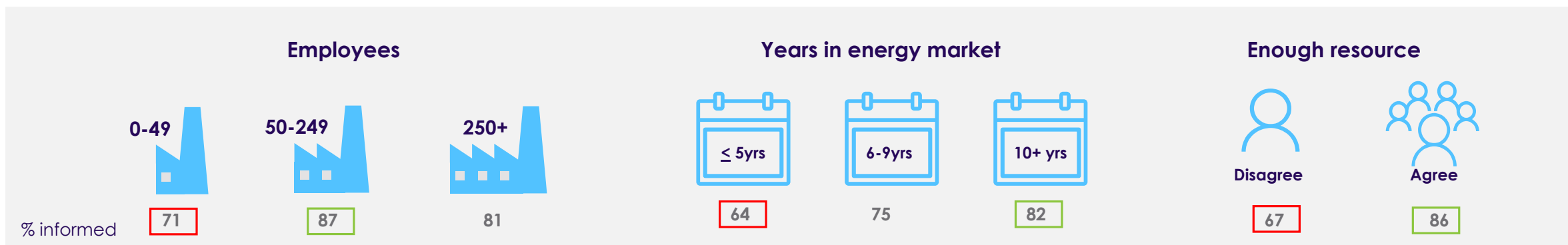
As observed with other aspects of service:

- Organisations with 0-49 employees are the least likely to say they are kept well informed

- Those who have been in the energy market for five years or less are less likely to believe that they are kept well informed

- Similarly, fewer organisations indicating they have limited resource say they are kept well informed

Kept informed about the code

The correlation between experience/size of an organisation and perceptions of being kept informed about the codes demonstrates that resource and familiarity tends to produce a more comfortable position from which to deal with associated processes

"

"I've only worked in the industry for a few years, but there are people here who have been working with the code for a long time. I tend to ask them before I approach the administrator. Nine times in ten they will have the answer."

"

"They could cut down a lot on unnecessary emails floating about the industry. It means things can be missed. We are expected to jump through the same hoops as the big six."

"

"I think it's a double whammy for small businesses. Codes are extremely complicated and difficult to understand, but they may not necessarily have someone who can interpret them. It's easier for bigger companies because they can afford the overheads. It's expensive having someone to interpret and understand all of the codes."

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 (373)

40

Receiving information

Channels used by CAs to deliver support are broadly in line with the methods of seeking support used by organisations, with email being the most used channel

Code administrator proactive support channels

Email notifications	Updates on website	Meetings and workshops	Newsletters	Offering helpdesk	Through relationship manager
74%	42%	41%	23%	22%	22%
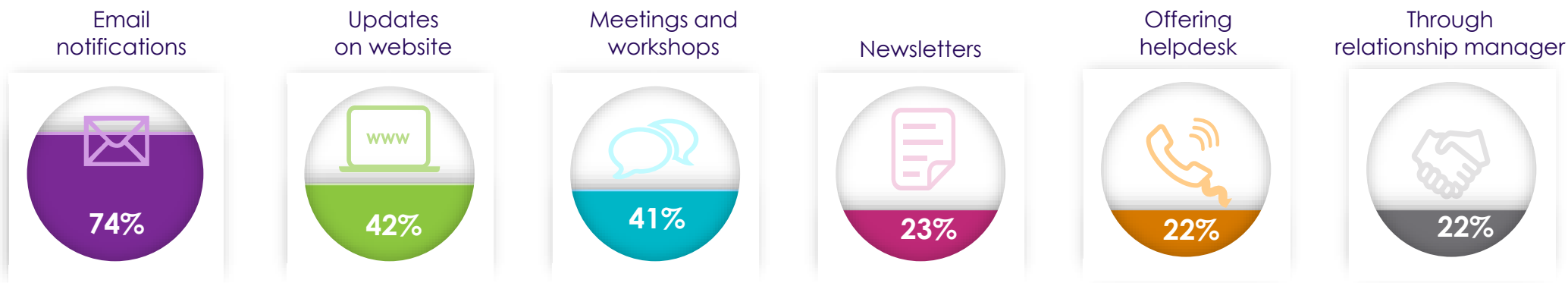
Support channels used by organisations

Email	Updates on website	Meetings and workshops	Reading documents	Offering helpdesk	Through relationship manager	Individual contacts
53%	50%	29%	38%	22%	15%	37%
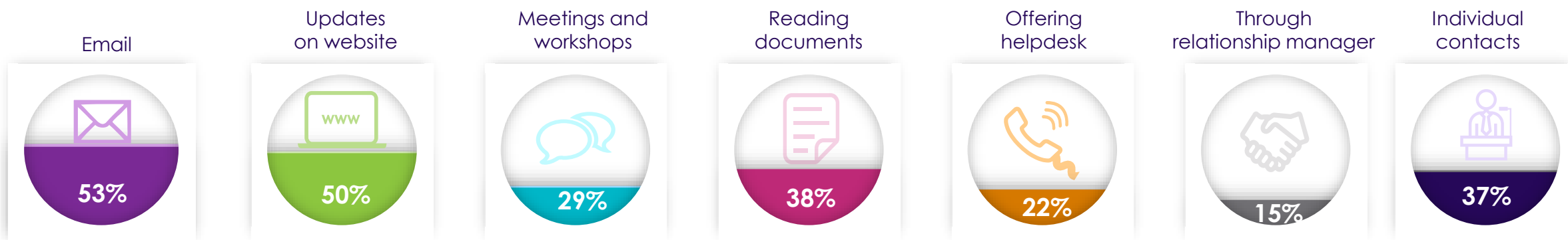
Q11/Q11b. How does your Code Administrator proactively support you in your interactions with the code?
Q12/Q12b. And how do you proactively seek information or support from your code administrator in relation to the code? Base: All responses for those involved with the code (373)

Frequency of receiving information from code administrator

Almost three-quarters of organisations are receiving information from their code administrator at least once a month and the majority say the frequency of information is about right

Frequency of receiving information (%)

Average:
1-2 times a week

13	8	25	25	23	6

- ☐ Less than once every 6 months
- ☐ Less than once a month, more than once every six months
- ☐ Less than once a week, more than once a month
- ☐ Once or twice a week
- ☐ 4 or more times a week
- ☐ Don't remember

And this frequency of information is… (%)

5	84	9	2

- ■ Too often
- ■ **About right**
- ■ Not often enough
- ■ Don't know
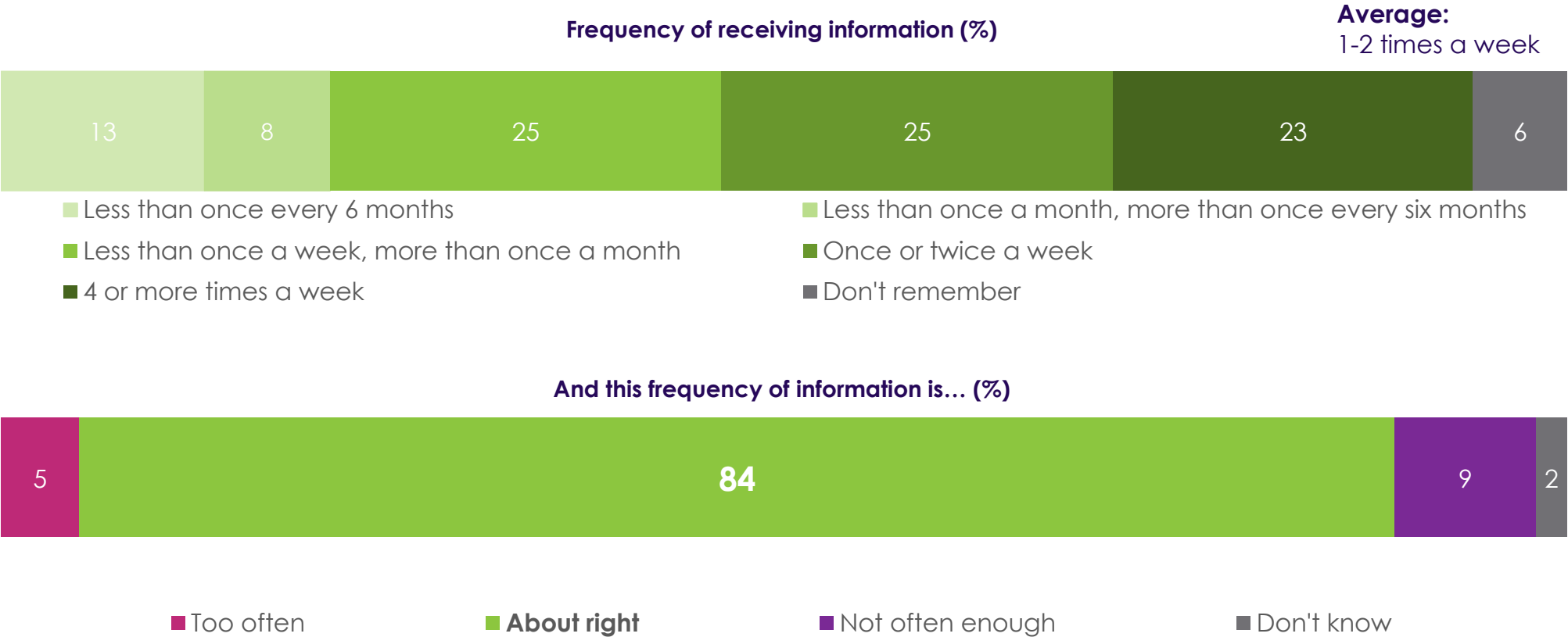
Q16/Q16b. How frequently do you receive information regarding any aspects of the <code> from your code administrator? Base: All responses for those involved with the code (373)
Q17/Q17b. And what do you think about this frequency of information in respect of the <code>? Base: All responses for those involved with the code receiving information (309)

Ease of interpreting information from the code administrator

Difficulty in interpreting information from code administrators is one of the most widespread problems for organisations

Ease of interpreting information (%)

NET: Easy (%)

Very easy	Fairly easy	Neither/nor	Fairly difficult	Very difficult	Don't know
17	41	21	14	3	3

59

■ Very easy ■ Fairly easy ■ Neither/nor ■ Fairly difficult ■ Very difficult ■ Don't know
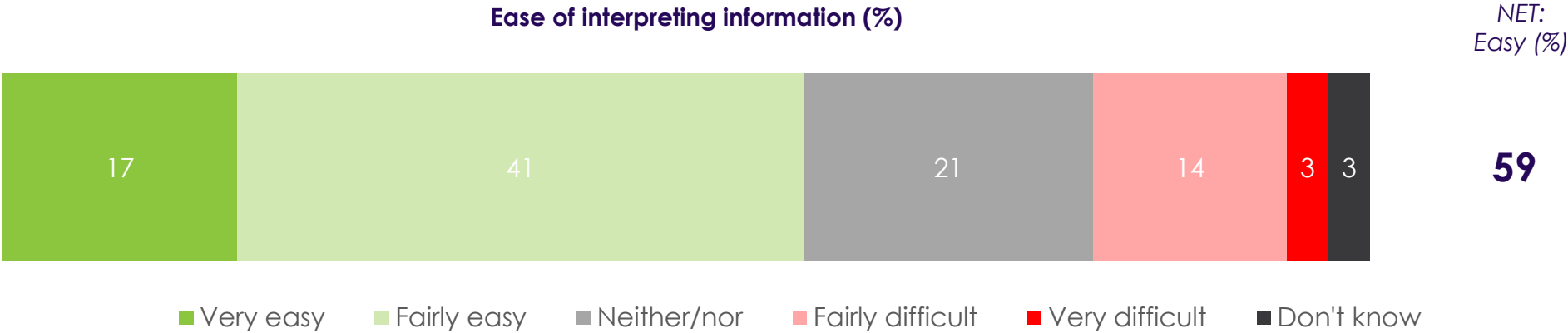
By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net easy	%	63	47	54	59	52	59	64	44	57	45	79
Net difficult	%	19	29	8	21	26	9	18	26	10	9	8

*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 (373)

Ease of interpreting information from the code administrator

While organisations recognise that codes are complex, the more experience they have with a code, the easier it is for them to interpret information in relation to it

> "I'm a bit concerned about changes in personnel going forward. Some people have worked in the industry for many years and are moving towards retirement. They have a large amount of knowledge and I can see gaping holes in the future. What are the plans for knowledge transfer?"

> "Their job is strictly quality assurance. They don't tailor information for new entrants. We are inexperienced, but I do my best to understand and implement changes. There are fundamental difficulties we have with all of the codes."

Employees

	0-49	50-249	250+
% easy	48	57	65

Years in energy market

	< 5yrs	6-9yrs	10+ yrs
	48	56	61

Personal experience of code

	< 5yrs	6-15yrs	16+yrs
	53	60	79

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 (373)
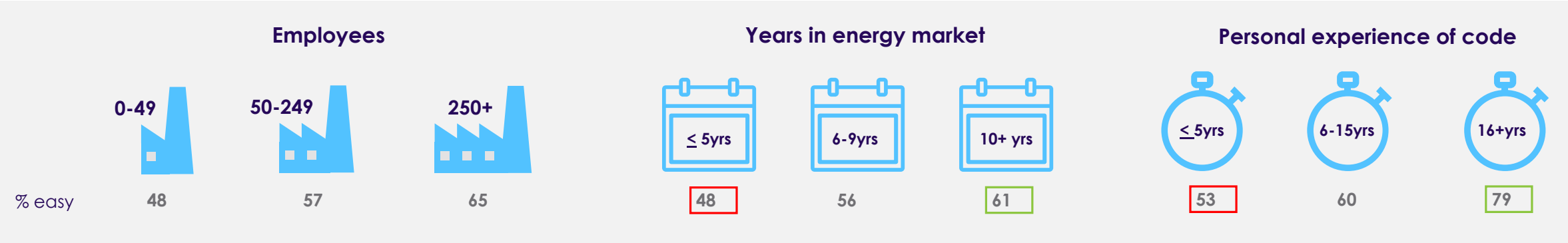
Relevance of information

Although information can be complicated, nearly nine in ten declare it as relevant

Relevance of information (%)

NET:
Relevant (%)

29	60	10	11

88

■ Very relevant   ■ Fairly relevant   ■ Not very relevant   ■ Not at all relevant   ■ Don't know
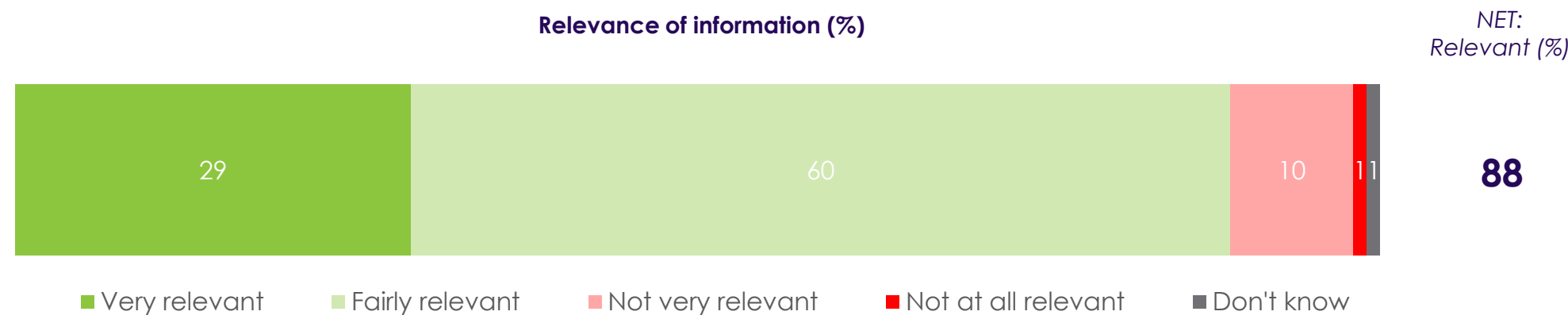
By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net relevant	%	87	97	89	85	92	88	94	83	73	67	94
Net not relevant	%	13	3	11	15	8	8	6	17	27	33	3

*small base size
**very small base size

interpret with caution

Q18/Q18b. How relevant is the information to you in dealing with the <code>, thinking generally, about the information that your code administrator provides? Base: All responses for those involved with the code receiving information EXCLUDING responses for those who do not get any information (309)

In detail:

Perceptions of direct services

Direct services

Organisations are generally content with information delivery channels but there is scope to improve certain aspects in order to enhance the customer experience
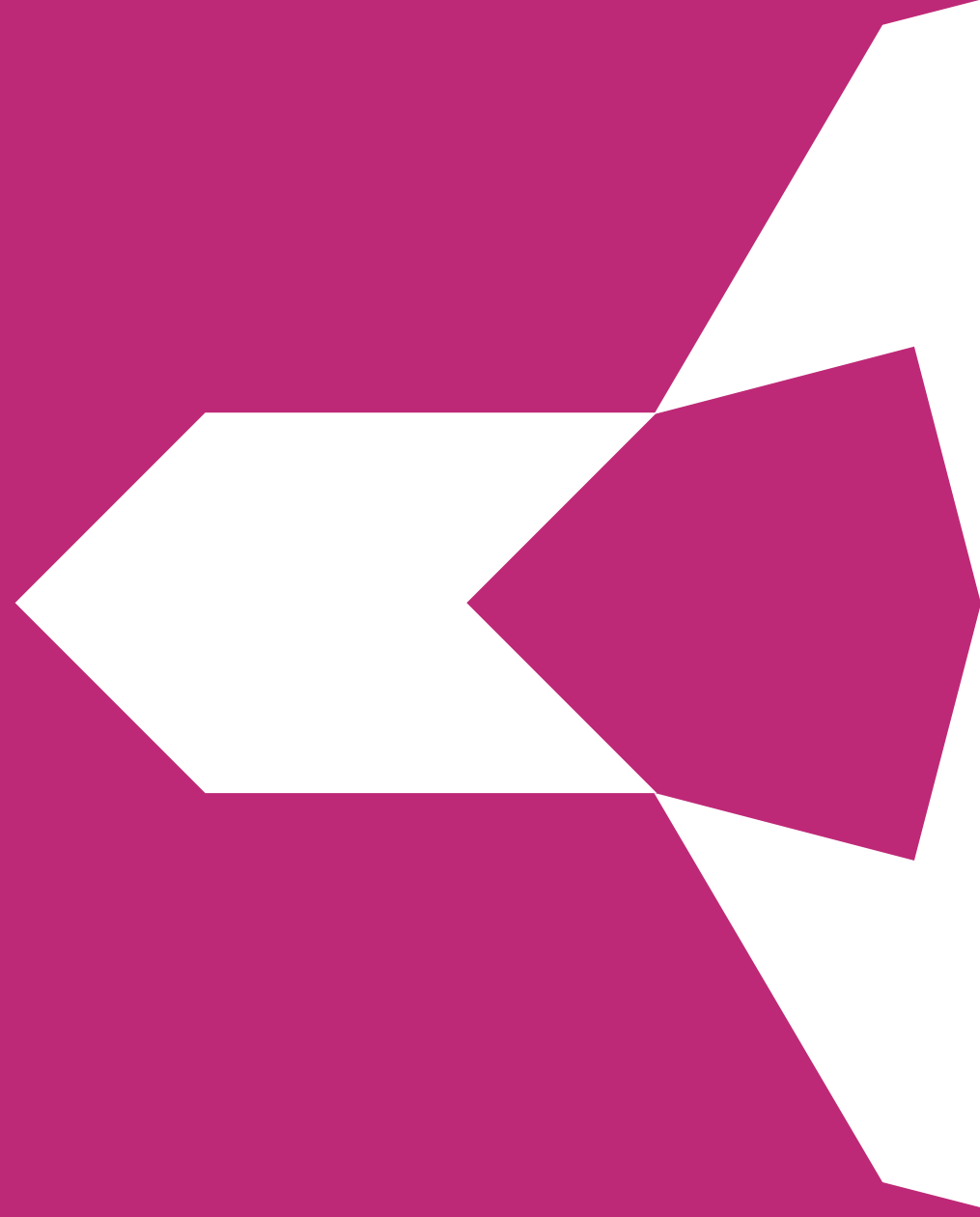
- The majority of organisations receive and seek information and support via email and tend to be positive about this channel. There are, however, some concerns regarding their ability to discern the relevance of the information they receive from code administrators

- Websites receive mixed reviews, with concerns particularly focused on being able to locate relevant information

- Just over four in ten had attended meetings in the last year; and found them fit for purpose. There are, however, some issues with the quality of teleconferencing

- Two-thirds have not raised a modification for any code they interact with, typically because there has been no need

- Those who have been through the modification process in the last year found it easy (85%), with sufficient support (85%)

- In contrast just half (52%) are satisfied with support from code administrators in helping them to understand modifications raised by others. This aspect of service has a direct correlation with perceptions of overall satisfaction so there is scope for some improvement

- A quarter are employed by an organisation that has become party to or begun the process to become party to the code in the last five years. A third were not involved with the process, but of those who were 62% felt the accession process was easy

Email

Organisations are generally happy with the emails they receive from their code administrator but they can be content heavy and it can be difficult to discern if they require immediate action

NET: Agree (%)

I receive emails in a timely manner
| 39 | 48 | 3 | 3 | 1 | 6 |

87

The emails I receive keep me sufficiently informed of any changes or modifications to the code
| 35 | 47 | 7 | 4 | 2 | 5 |

82

The emails I receive make it clear when action needs to be taken
| 38 | 38 | 7 | 10 | 2 | 5 |

76

The emails I receive are easy to understand
| 25 | 49 | 8 | 10 | 3 | 5 |

73

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know

NET: Disagree (%)

It's not clear if the emails in respect of the code are relevant to my organisation
| 2 | 21 | 8 | 31 | 32 | 5 |

63

I ignore the emails sent by the code administrator in respect of the code
| 1 | 8 | 5 | 34 | 47 | 5 |

81

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 (297)

Pros and Cons

+

- Information is easily accessible via email – if it comes straight to their inbox they do not have to manually search through websites to keep track

- Communication by email means there are regular updates of information and organisations can stay on top of changes to the code

- Organisations prefer using email as it ensures there is an audit trail

−

- Some emails can be content heavy, although this can be necessary to ensure all relevant information is passed on to organisations

- Volume of information received through this channel can be harder to digest for those with minimal resource and those dealing with multiple codes

- There are difficulties in identifying which emails contain vital information which needs immediate action or prioritisation against those providing general updates

"I get emails that keep me up to date with the latest code modifications, and if there's something I don't know I'll call them. So I don't often need to use the website."

"I tend to scan emails from code administrators and try to identify whether they contain anything urgent. If not, I'll park it – customer issues are my priority."

"Emails are a point of contact for further clarification, like additional information or explanations."

"I think there's issues about explaining things to people. Some of the modifications that come by email have technical names but no practical indication of what it is. That would helpful."

"I do prefer getting emails. It helps when it comes to auditing."

"I don't have the time to read the emails in great detail. I get too many of them and a lot of the time they aren't relevant to us."

Websites

Websites receive more mixed reviews, with more varied experiences of being able to locate information and being informed there are fresh documents to access

NET: Agree (%)

Statement	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	NET: Agree (%)
It is easy to access the website	44	36	5	9	5	2	**79**
The information provided on the website is up to date	31	48	11	4	2	3	**79**
The information on the website is easy to understand	20	50	12	13	3	2	**70**
The website keeps me sufficiently informed of any changes/modifications	22	44	13	12	3	6	**66**
The information provided on the website makes it clear when action needs to be taken	18	43	22	11	3	3	**61**
I am able to easily find information on the website	17	44	11	20	6	2	**61**
I am informed when updates are published on the website	19	34	16	17	8	6	**53**

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know

NET: Disagree (%)

Statement	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	NET: Disagree (%)
It's not clear if the information provided on the website is relevant for my organisation	4	19	14	39	20	3	**59**

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 (232)

50

Pros and Cons

+

- Those dealing with a particular code regularly and therefore accessing its website were more accomplished at navigating to the relevant area
- Websites with speedy access were preferred compared with those where passwords etc. are required
- A few mentioned they had given feedback to their code administrator on website problems, and they had updated it accordingly

"I look at the SEC website daily. The content is fine. Perhaps there's some presentational stuff that could be better but nothing major."

"The website itself is good, they took on board my suggestions and now it is easier to navigate."

-
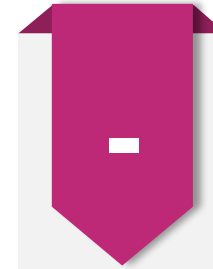
- Websites requiring logins etc. were not viewed positively as information is all in the public domain
- Code administrator websites vary in quality – some are flagged as being particularly difficult to navigate, especially for those who are new to the code
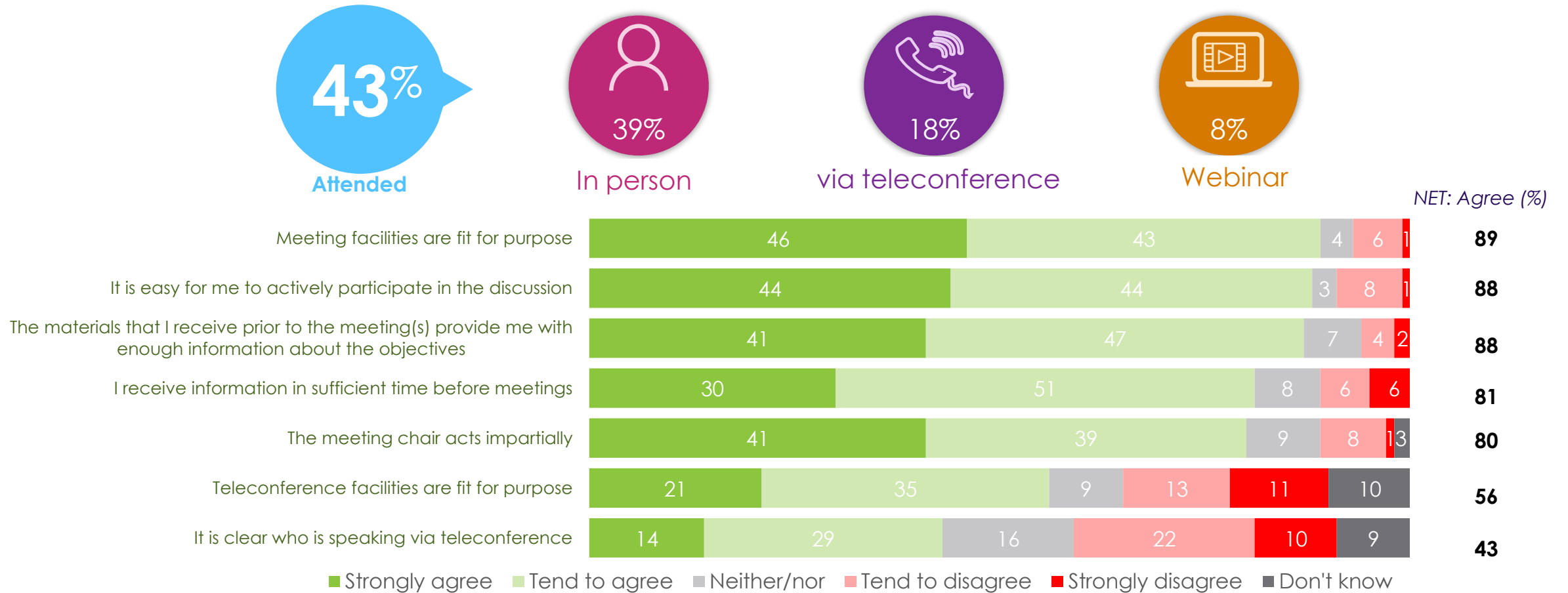- Some websites are out of date, or not updated as frequently as others

"I only use the CUSC section of National Grid's website so I'm more familiar with it now, but if you weren't so familiar it would probably be difficult to understand or know where to find certain things. It's quite slow to be updated."

"It would help if the websites had a 'Contacts' section, showing who to contact for certain queries, what their job roles are and how to contact them."

"Make it a little bit more user friendly on the website - it's a very comprehensive website and you really need to be experienced in order to use it. They could do more for new people."

Meetings

Two in five have attended a meeting regarding a code in the past year

43% Attended

39% In person

18% via teleconference

8% Webinar

Statement	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	NET
Meeting facilities are fit for purpose	46	43	4	6	1		**89**
It is easy for me to actively participate in the discussion	44	44	3	8	1		**88**
The materials that I receive prior to the meeting(s) provide me with enough information about the objectives	41	47	7	4	2		**88**
I receive information in sufficient time before meetings	30	51	8	6	6		**81**
The meeting chair acts impartially	41	39	9	8	1	3	**80**
Teleconference facilities are fit for purpose	21	35	9	13	11	10	**56**
It is clear who is speaking via teleconference	14	29	16	22	10	9	**43**

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know

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 (373)

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 (160)

Pros and Cons

+

- Introductory sessions to codes are very valuable for companies or individuals new to the market

- Chairs are generally considered impartial and effective

- Most organisations feel that when they do attend it is easy to contribute

- They agree that code administrators do their best to encourage attendance from stakeholders

-

- Cannot attend numerous meetings especially if responsible for more than one code

- Teleconferences are problematic in being able to be heard/contribute and vice versa to hear/include others

- Some feel that meetings are often London-centric, making it difficult for them to attend

- Both small and larger organisations feel they do not always have the resource to attend every meeting

"I would say I'm satisfied with them because the meeting rooms are always fit for purpose, the minutes are accurate and on time, you always get the paperwork a week in advance… Generally everything is accurate. Code administrators work under a contract that the industry pays for, so it's in their interests to do their jobs well."
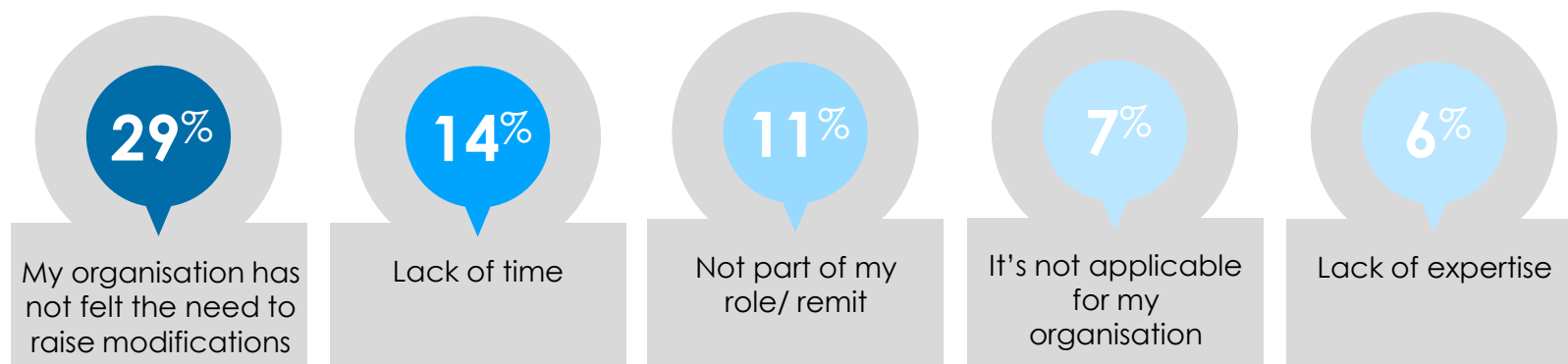
"The big six will have 17 people doing the job that I have to do in 20 minutes a week. They can attend meetings, reduce the effects of modifications and send everyone to panels to protect their view. But the people who don't have the money, time, resource, or even the know-how, to participate cannot have their views heard."

"They have a forum, a meeting group, which parties to the code, industry bodies and stakeholders can attend to chat through modifications and potential issues. When there's no meeting it's not as open with the issues people are having."

"It would be really nice if somebody could come and do the regions. It's hard to find the time or money to go to London."

Raising modifications

Two-thirds (66%) have not raised a modification for any code they interact with

Overall, the most common reasons for not raising a modification are:

29%
My organisation has not felt the need to raise modifications

14%
Lack of time

11%
Not part of my role/ remit

7%
It's not applicable for my organisation

6%
Lack of expertise

20% stated other reasons for not raising modifications:

"I've raised several issues but nothing's come to fruition or become modifications."

"My company is fairly new to the market and looking at some of the change requests, I'd say it was hard to get a change approved."
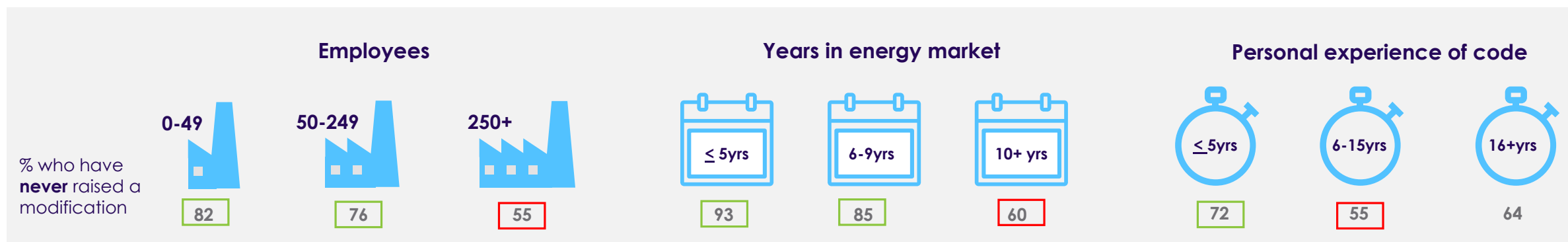
"We're a very new company and we already have so much on our plate. Leave it to the experts elsewhere."

Raising modifications

Size of organisation and experience have an influence on raising modifications

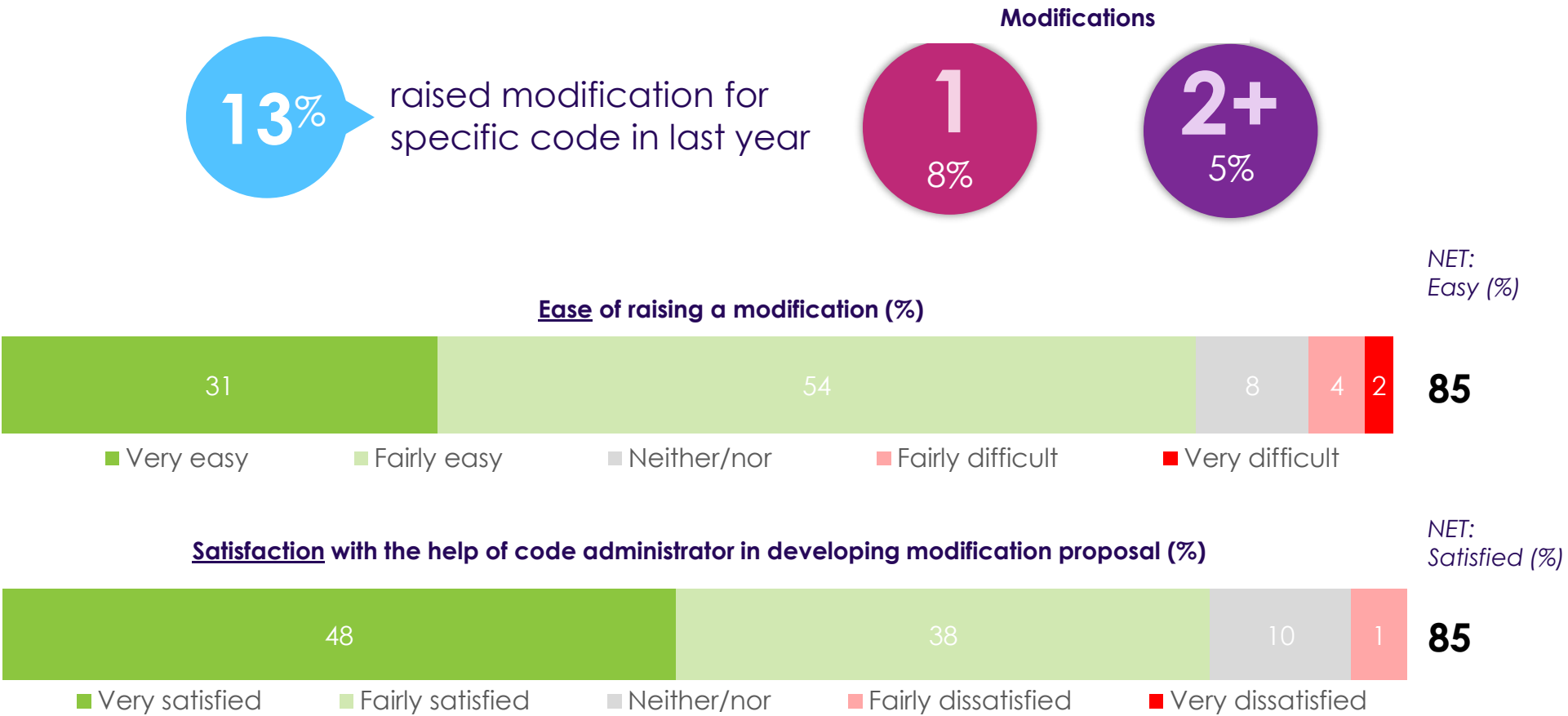| Employees			Years in energy market			Personal experience of code		
0-49	50-249	250+	≤ 5yrs	6-9yrs	10+ yrs	≤ 5yrs	6-15yrs	16+yrs
82	76	55	93	85	60	72	55	64

% who have **never** raised a modification

- Smaller organisations are less likely to raise modifications. There was a general perception that the larger organisations would have the expertise and resource to take more of a lead in this process

- Similarly, those who are relatively new to the energy market or have limited experience of codes are less likely to have raised a modification

Q23/23b & Q26. Have you been responsible for raising any modifications in respect of the <code> within the last 12 months? And have you raised any modifications for the other codes you interact with? Base: All respondents (204)

Q27. Why have you not raised any modifications over the last year? Base: All respondents (204)

Perception of modifications process

The modification proposal process is rated highly

13% raised modification for specific code in last year

Modifications

1 8%

2+ 5%

Ease of raising a modification (%)

NET: Easy (%)

31	54	8	4	2

85

- Very easy
- Fairly easy
- Neither/nor
- Fairly difficult
- Very difficult

Satisfaction with the help of code administrator in developing modification proposal (%)

NET: Satisfied (%)

48	38	10	1

85

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied

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 (373)
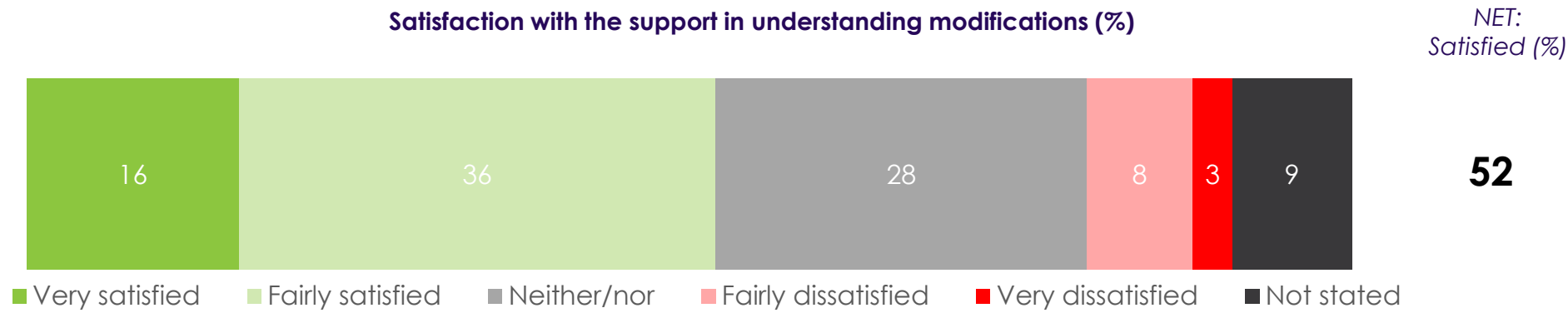
Q24/Q24b. And how easy or difficult was the process of raising a modification in respect of the code? Base: All responses for those raising modifications in respect of the code within the last 12 months (48)

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 (48)

Understanding modifications

Half are satisfied with the support received with new modifications, and a further quarter are neutral

Satisfaction with the support in understanding modifications (%)

NET: Satisfied (%)

16	36	28	8	3	9

52

■ Very satisfied   ■ Fairly satisfied   ■ Neither/nor   ■ Fairly dissatisfied   ■ Very dissatisfied   ■ Not stated

By code

		BSC	CUSC	Dcode**	DCUSA*	Grid Code*	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	63	37	69	52	44	50	57	47	47	27	59
Net dissatisfied	%	11	18	0	21	19	3	11	9	7	9	5

*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 (373)

Understanding modifications

Consistent request for a central depository of modifications to codes

Having the resource and experience within the market again influences attitudes towards code administrator support in understanding modifications

"

"Communication on the modifications to be clear about who (i.e. which participants) and how they may impact them to enable me to prioritise any involvement with the modifications. At the moment I feel this is lost and the communication of what the modification will achieve is so jargon loaded that I cannot determine this easily, if at all, myself."

"

"There is an assumption that parties understand all industry jargon when they don't. Language needs to be clearer as some modifications are still very hard to read."
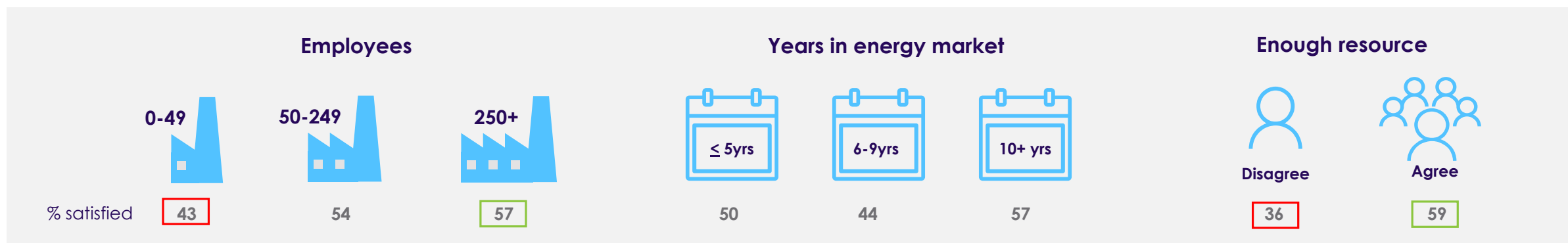
"

"It can be hard to articulate points during the modification process and we often find that other companies have more time and expertise to raise them. We can't react as quickly or as efficiently as there are gaps in our knowledge (as it's a very technical industry) and we're tiny in comparison with other firms."

"

"Modification reports assume a background knowledge which isn't always there."

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 (373)

Understanding modifications

While some groups are more satisfied than others, levels are relatively modest across the board

	Employees			Years in energy market			Enough resource	
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs**	**10+ yrs**	**Disagree**	**Agree**
% satisfied	43	54	57	50	44	57	36	59

- Smaller organisations report lower satisfaction levels with the support they receive in helping them to understand what modifications mean for them

- Those with more limited resource also tend to be less satisfied, this may in-part be attributed to the challenges that they face in interpreting the information they receive

Accession process

28% employed by an organisation that became party to, or began the process to become party to, the code in the last five years

Ease of becoming party to the code (%)

NET:
Easy (%)

10	32	14	7	4	33

41

■ Very easy ■ Fairly easy ■ Neither/nor ■ Fairly difficult ■ Very difficult ■ Not involved with the process
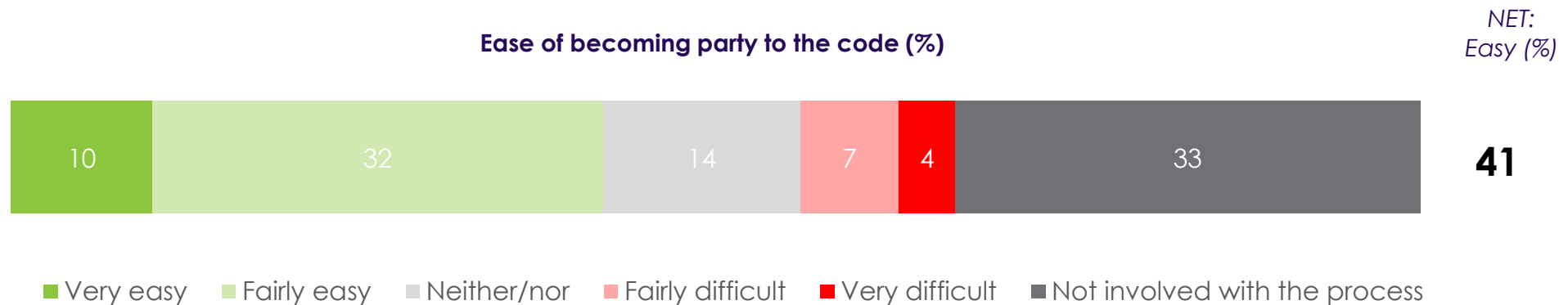
Q8/Q8b. Has your organisation become party to or begun the process to become party to the code in the last five years? Base: All responses for those involved with the code EXCLUDING DCode and Grid Code (333)
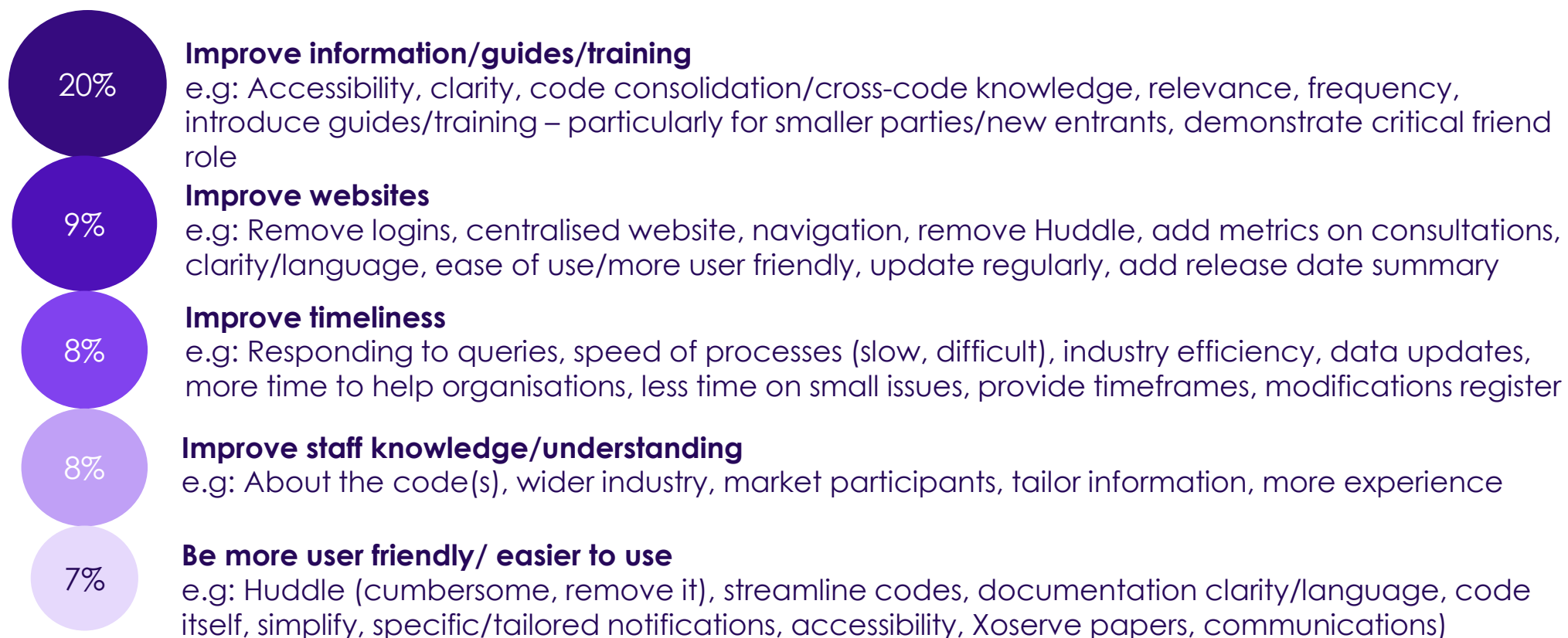
Q9/Q9b. And still thinking about your current role, how easy or difficult did you find the process of becoming party to the <code>? All responses for those who have become party or begun the process to become party to the <code> in the last five years (94)

Conclusions and recommendations
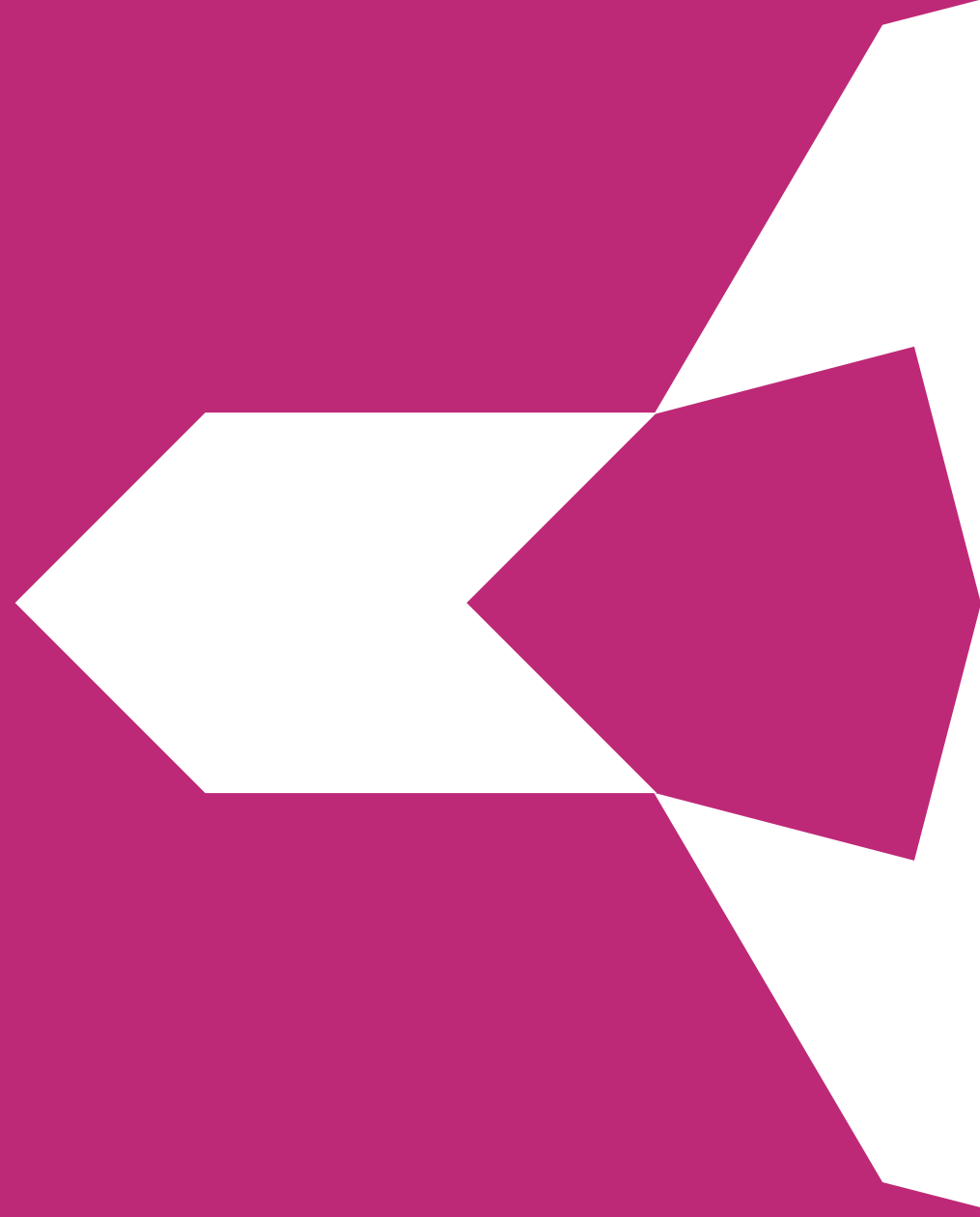
Suggested improvements

When asked to suggest one specific improvement to the service provided by code administrators, seven out of ten organisations could identify an area for development

20%

Improve information/guides/training
e.g: Accessibility, clarity, code consolidation/cross-code knowledge, relevance, frequency, introduce guides/training – particularly for smaller parties/new entrants, demonstrate critical friend role

9%

Improve websites
e.g: Remove logins, centralised website, navigation, remove Huddle, add metrics on consultations, clarity/language, ease of use/more user friendly, update regularly, add release date summary

8%

Improve timeliness
e.g: Responding to queries, speed of processes (slow, difficult), industry efficiency, data updates, more time to help organisations, less time on small issues, provide timeframes, modifications register

8%

Improve staff knowledge/understanding
e.g: About the code(s), wider industry, market participants, tailor information, more experience

7%

Be more user friendly/ easier to use
e.g: Huddle (cumbersome, remove it), streamline codes, documentation clarity/language, code itself, simplify, specific/tailored notifications, accessibility, Xoserve papers, communications)

Only improvements mentioned by 7% or more organisations are shown

Suggested improvements

"**Huddle can be quite cumbersome**. As they email us with 'This document has been added...' it can be hard to know what it's about. You then have to go onto the site, log in, find the document, download it and read it which isn't greatly user friendly. Sometimes for example, I may not have internet access so I cannot read the documents. **They should also have an easier way to do it, just like the other codes do**."

"Better **understanding of who it's going to affect** and to help people to **understand what the impacts** are going to be.

"The whole code process is essentially tactical and designed for specialist electricity (or for that matter, gas) industry "insiders". It is opaque and unwelcoming for outsiders, like energy consumers, even the largest of whom don't have the resource or time... **The whole process needs to recognise that users of the system are not just Generators, Suppliers, DNOs and TSOs, but also end-users (who pay for most of this)**."

"Why has the money that we've provided not been funded into industry experts? They could provide further support and service into the timely and correct way of a company going around things**. I would suggest that each new company be assigned to an industry expert for approximately 3 years** to provide a little heads up, the gist of the codes and this is how its going to affect your business. In other words a relationship manager."

"**Could they get their BSC documentation restructured to make it more readily understandable**. Spending more time trying to understand it and finding relevant bits of information, and thus raising unnecessary questions (showing it's age)."

"Very inaccessible to new market entrants and that although complex, **a lot more effort could be put in to accessibility** (guides, training and workshops)."

"Across all of the codes: it would be nice to have **a hand holding exercise for those that do not have the resource and the knowledge** as others to sort of level the playing field. Most code modifications are brought up by big utilities, supported and approved by them.

"**Amalgamating with the other codes** [where there are similarities]. There is separate code governance where there appears to be no reason to have multiple codes for."

Q29/Q29b. 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 (373)

Conclusions

Organisations are generally positive in their assessment of the code administrators they deal with

Improvements to service centre around support and information provision, and ways to consolidate this

There is evidence of higher standards of service associated with certain aspects of processes

There is a consistent correlation between perceptions of service and familiarity /capability of dealing with the codes

External factors can influence attitudes to dealing with the codes

Recommendations

Develop a centrally focussed information and support network, e.g. simultaneous accession; modifications processes etc.

Provide greater support for smaller/new entry organisations

Streamline communications to ensure information can be easily prioritised for action

Examine external factors which can influence perceptions of the codes

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