Code Administrators Performance Survey

Independent Gas Transporter UNC (iGT UNC)

Gemserv

Introduction

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 to each code that they administer.

The study is now in its third year and is designed 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 is not intended to take account of the relative funding of the Code Administrators (CA), or whether they offer value for money.

In 2019, the study has been repeated to monitor performance and identify any developments. Specifically, the survey will be used to:

- **Identify:** Organisations' interaction with codes and CAs; including awareness of CA responsibilities, confidence in dealing with codes, and expectations of the service which Code Administrators should be providing.
- **Measure:** Overall performance of CA on key metrics, including overall satisfaction, support, communications and modification process.
- **Assess:** Specific aspects of service delivery, including email, websites, meetings and accession process.

Throughout the report, we will show data for 2017, 2018 and 2019 and draw comparisons as appropriate.

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- Email industrycodes@ofgem.gov.uk

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Method

A mixed mode programme of research was conducted with organisations interacting with industry codes. The scope of the research included:

- Telephone discussions with Code Administrators prior to commencing the research programme. The conversations were designed to establish any major changes in service provision, thus allowing Future Thinking the ability to contextualise results from the 2019 survey.
- A mixed mode quantitative survey (online and telephone) with 203 participants to measure experience and performance of code administrators – **35 participants answering about the iGT UNC** (17 June – 12 July 2019).
- 25 follow-up in-depth interviews to get an understanding of drivers of satisfaction/dissatisfaction (15 July – 8 August).

Throughout the report, results are shown:

At a total level (aggregated results for all codes)

At a total level for the iGT UNC (due to small base sizes, results are not broken down by subgroup)

Quotes from respondents included in the report are not intended to be representative of the range of views, but rather offer a range of opinions, feedback and suggested improvements

Where base sizes are small, this is shown by an * for bases less than 30 and ** for bases less than 15. This indicates that the data should be treated with more caution and is indicative only.

Industry context

The current structure and perceptions of the energy industry in which organisations operate are seen to have an impact on interactions and attitudes towards Code Administrators and should be taken into account when interpreting survey results.

Organisations acknowledge that the codes are necessarily complex and that the environment is challenging but believe fundamental changes in their administration could help to simplify processes and introduce greater consistency.

A key area for desired change in 2019 is reviewing CACoP with the belief that it can better serve customers by unifying Code Administrators. There is appetite among customers for CACoP:

- to have its own website.

- to deliver greater guidance to CAs on uniformity of information provision.

- to enforce levels of consistency around support provided through the modifications process.

- to provide weekly cross-code round-ups of forthcoming changes and expected impact on organisations.

While customers recognise the differences between codes, and the level of complexity associated with each, there remains a belief that simplifying and unifying operational aspects of codes would greatly assist CAs and the service delivery to customers.

There is also a preference for Ofgem to work more closely with CAs at earlier stages of modifications to avoid delays and further complications.

These wider external factors can influence how organisations perceive the service provided by individual code administrators.

Executive summary – iGT UNC

On the whole, Gemserv continues the positive trends seen in 2017 and 2018. Satisfaction stands at 63% (22 respondents) and 20% (seven respondents) state the service has improved and none that it has worsened.

There are also positive trends for aspects including email communications and the teleconference facilities.

Some improvements could be achieved around the general support provided by Gemserv and support specifically around understanding modifications raised by others.

Organisation profiling

The level of expertise organisations have to deal with codes remains consistent with previous years. However, availability of resource in 2019 has slightly declined.[1]

More generally, in 2019, there is some evidence of larger organisations indicating that they are having some resourcing challenges.

"We are a large company but we have some challenges. A lot of our employees are not in energy, so although we are large, when it comes to engagement, it is difficult."
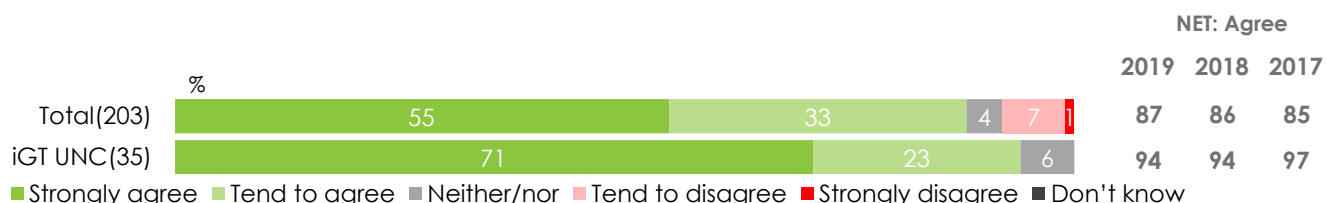
SELF-REPORTED ORGANISATION'S SIZE

	No. of employees			
	0-49	**50-249**	**250-999**	**1,000+**
Total (203)	24%	15%	14%	45%
iGT UNC (35)	14%	17%	17%	49%

SELF-REPORTED ORGANISATION'S ENERGY MARKET EXPERIENCE

	0-5 years	**6-9 years**	**10+ years**
Total (203)	15%	7%	78%
iGT UNC (35)	9%	3%	89%

SELF-REPORTED SUFFICIENT ORGANISATIONAL EXPERTISE TO DEAL WITH CODES

NET: Agree

	%					2019	2018	2017
Total(203)	55	33	4	7	1	87	86	85
iGT UNC(35)	71	23	6			94	94	97

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

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 responses for those involved with code number of responses shown in brackets).

SELF-REPORTED ORGANISATION'S RESOURCE

NET: Agree

	%					2019	2018	2017
Total(203)	28	35	12	20	5	63	70	64
iGT UNC(35)	34	40	14	11		74	71	65

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know
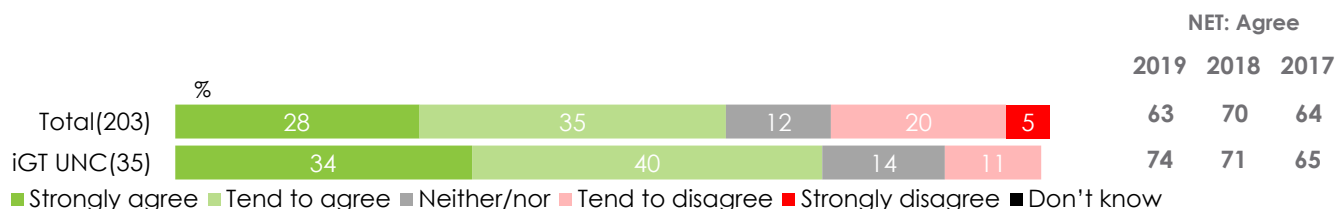
Q2. And to what extent would you agree or disagree that you have enough resource within your organisation to sufficiently deal with the codes you are responsible for or interact with? Base: All responses for those involved with code (number of responses shown in brackets).

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[1] There is a weak correlation between an organisation's self-reported level of resource and overall satisfaction with Code Administrators. However, this does not imply causation.

Challenges around availability of resource impact both small and large organisations; any support therefore has to reflect the organisation's individual circumstance rather than size.
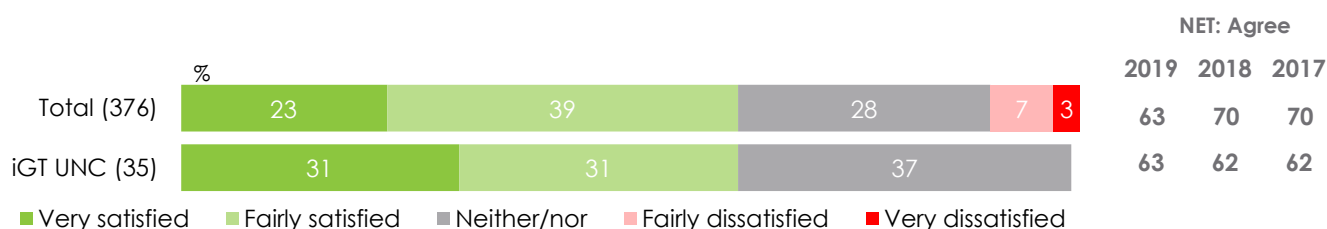
Key findings

KPIS

The survey collected four wide measures of satisfaction:

1. Overall satisfaction with the service provided to their organisation.
2. Satisfaction with the provision of support.
3. Satisfaction with support received when requested.
4. Perceived improvements from service received in the last year (introduced in 2018).

Organisations rate iGT UNC highly across all KPIs. At an overall level, nearly two-thirds (63%) of organisations say they are satisfied with the overall service. Satisfaction with the provision of support with respect to their interactions with the iGT UNC has remained consistent since 2017.

OVERALL SATISFACTION

At an all organisational level, we see a shift in reported overall satisfaction, down from 70% in 2018 to 63% in 2019. Similar to both 2018 and 2017, 63% of organisations are satisfied with Gemserv's service regarding the iGT UNC (22 out of 35 respondents). Encouragingly, there are none who are dissatisfied.

	Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied	NET: Agree 2019	NET: Agree 2018	NET: Agree 2017
Total (376)	23	39	28	7	3	63	70	70
iGT UNC (35)	31	31	37			63	62	62

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 code (number of responses shown in brackets).
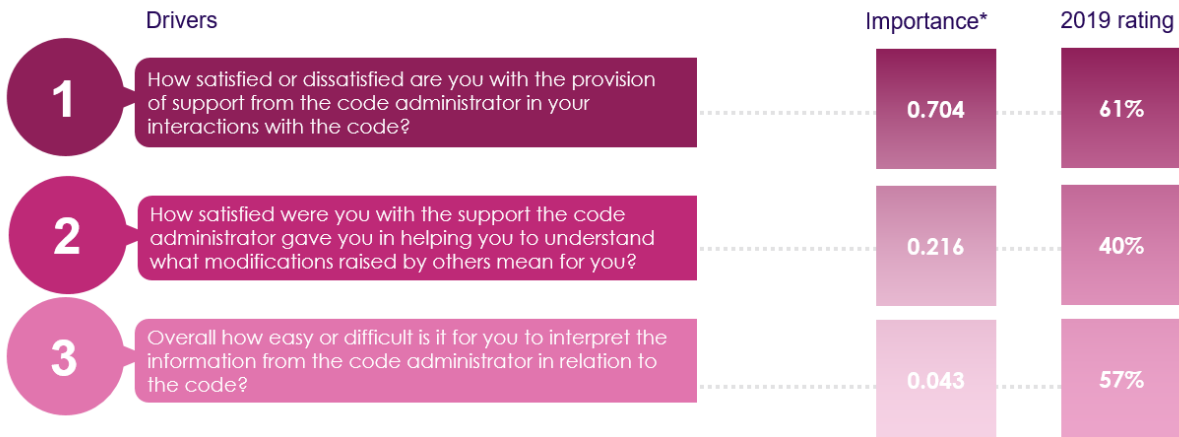
Organisations reported positively about their interactions with the code administrator:

"They have been very helpful but I have had more limited experience with them."

"They are more helpful, they are being collaborative."

"They do multiple codes so always learning and evolving. They use technology effectively."

To understand the aspects of service delivery that most impact overall satisfaction, key driver analysis (KDA) was conducted.[2] The aspects of service that have the greatest impact on overall satisfaction are:

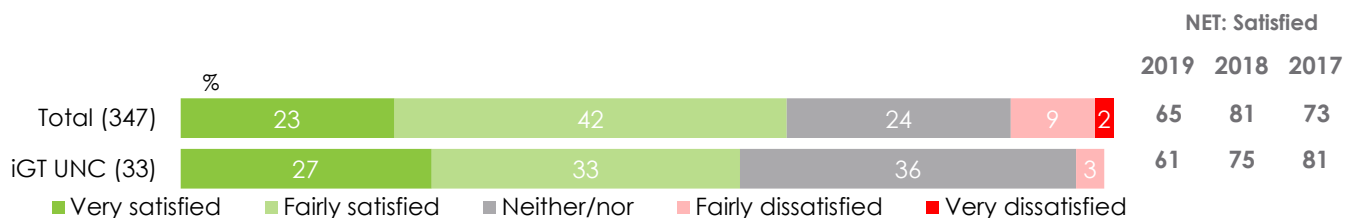|	Drivers	Importance*	2019 rating
1	How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the code?	0.704	61%
2	How satisfied were you with the support the code administrator gave you in helping you to understand what modifications raised by others mean for you?	0.216	40%
3	Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to the code?	0.043	57%

* 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.)

Due to the small base sizes, it is not possible to identify the key drivers for individual codes. The importance scores in the chart above are therefore based on the combined total for all codes and the 2019 current rating is specific to the iGT UNC.

At an overall level, the three key drivers of satisfaction continue to be around support and information. While provision of support is still the most important driver for satisfaction, it has become even more important rising from 0.467 to 0.704 in 2019. It is however striking that the reported satisfaction around these key areas has dropped significantly at a total level as well as for the iGT UNC. There are opportunities to improve service around all the three key drivers of satisfaction. With service improvements to these core areas, it is likely that 2020 may see a positive lift in reported overall satisfaction.

SATISFACTION WITH PROVISION OF SUPPORT

After the strong uplift seen in 2018, 2019 sees a significant decline in reported satisfaction with provision of support from Code Administrators, and now stands at 65% (from 81% in 2018). Sixty one percent of iGT UNC customers say they are satisfied with the provision of support received (20 of 33 aware of support) which is an area of decline since 2017 and through 2018.

						NET: Satisfied		
%						2019	2018	2017
Total (347)	23	42	24	9	2	65	81	73
iGT UNC (33)	27	33	36	3		61	75	81

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

*Low base

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 (number of responses shown in brackets).

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[2] KDA tests the strength of the correlation between ratings of core metrics against perceived level of satisfaction by which we can derive which factors have the greatest impact on overall attitudes – this is a subconscious measurement rather than a stated level of importance.

SATISFACTION WITH SUPPORT RECEIVED WHEN REQUESTED

Again, we see a decline in satisfaction with support received when organisations request it. Overall, satisfaction is back to the 2017 level and stands at 72%. However, 79% (22 out of 28 proactively seeking support from Gemserv on the code) are satisfied with the support in relation to the iGT UNC when they request information compared with 69% in 2018.

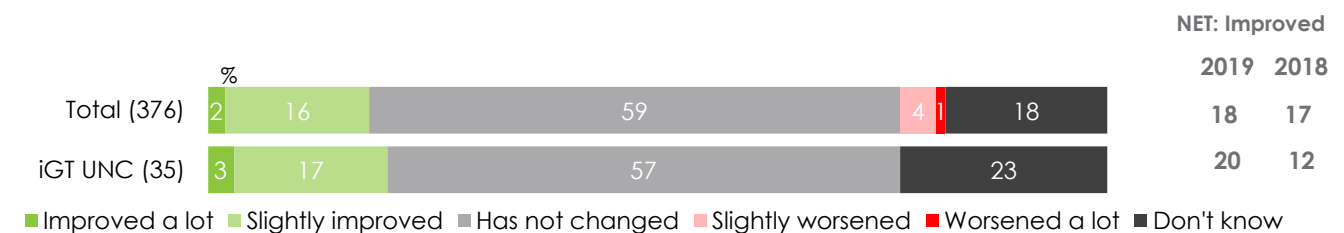|	Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied	NET: Satisfied 2019	2018	2017
Total (331)	30	42	19	8	1	72	80	72
iGT UNC (28*)	39	39	18	4		79	69	73
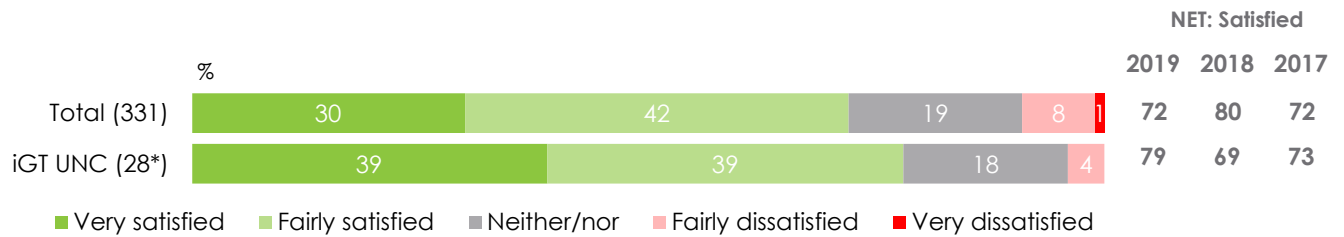
*Low base

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 (number of responses shown in brackets).

PERCEIVED IMPROVEMENT

At an overall level, organisations tend to believe that the service they receive has not changed over the last year. For iGT UNC, a moderate majority of 57% (20 respondents) indicate that service levels have not changed from last year, and 20% (seven respondents) feel it has improved.

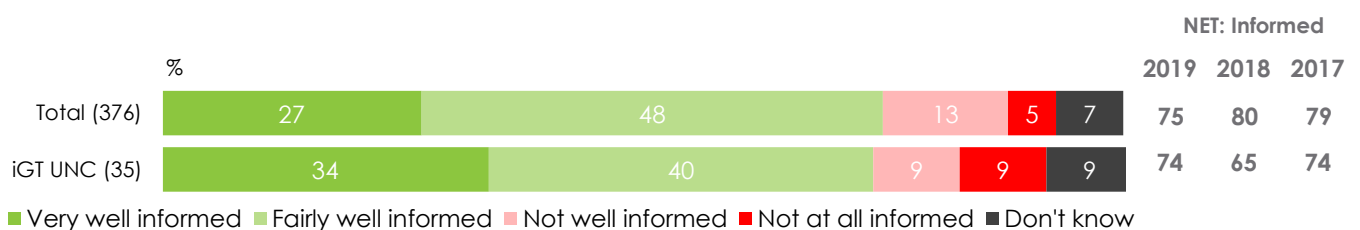|	Improved a lot	Slightly improved	Has not changed	Slightly worsened	Worsened a lot	Don't know	NET: Improved 2019	2018
Total (376)	2	16	59	4	1	18	18	17
iGT UNC (35)	3	17	57			23	20	12

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 for those involved with code

Perceptions of information provision

On average, organisations claim to receive information about the iGT UNC from Gemserv about once a week and for 72% (18 of 25 respondents receiving information), this frequency is about right. It is worth highlighting that 20% (five respondents) feel the frequency is not often enough.
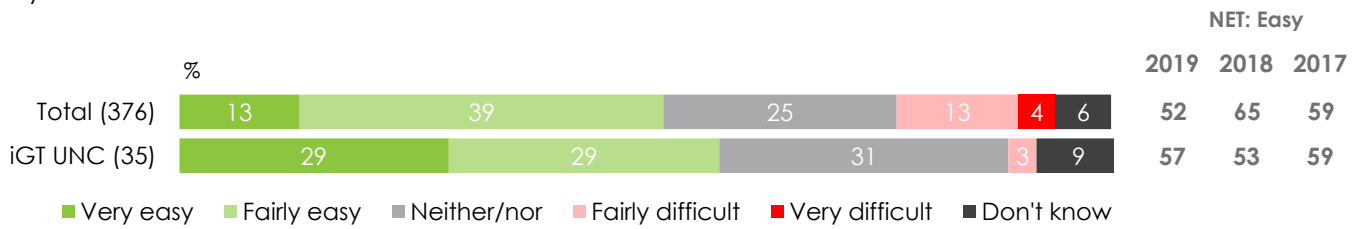
KEPT INFORMED ABOUT THE CODE

Typically, organisations believe that Code Administrators keep them well informed about the codes; we however see a very slight decline in those feeling very or fairly informed (from 80% in 2018 to 75% in 2019). Seventy four percent of organisations (26 respondents) say that Gemserv keeps them 'very' or 'fairly' well informed about the iGT UNC. This indication of improved communication brings the figure back up to 2017 levels.

	Very well informed	Fairly well informed	Not well informed	Not at all informed	Don't know	NET: Informed 2019	2018	2017
Total (376)	27	48	13	5	7	75	80	79
iGT UNC (35)	34	40	9	9	9	74	65	74

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

EASE OF INTERPRETING INFORMATION

After the positive uplift seen in 2018, reported ease of interpreting information has declined. Overall, around half of organisations feel it is easy to interpret information from Code Administrators in relation to their codes. Fifty seven percent (20 respondents) find it easy to interpret information coming from Gemserv in relation to the iGT UNC. Just one person (accounting for three percent) says it is difficult.

	Very easy	Fairly easy	Neither/nor	Fairly difficult	Very difficult	Don't know	**NET: Easy** 2019	2018	2017
%									
Total (376)	13	39	25	13	4	6	**52**	**65**	**59**
iGT UNC (35)	29	29	31	3		9	**57**	**53**	**59**

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

Q15/Q15b. Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to Base: All responses for those involved with code (number of responses shown in brackets).

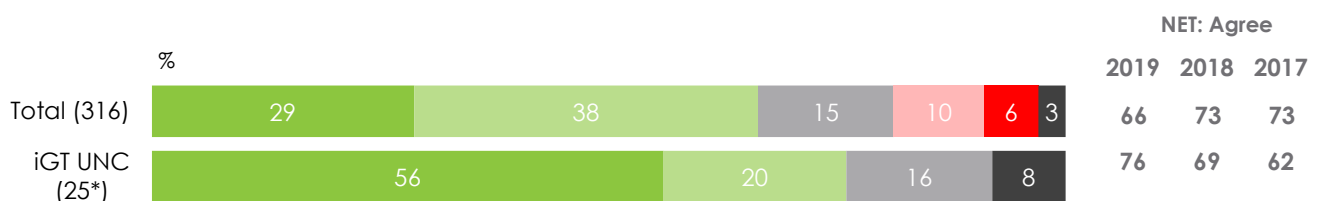## Perceptions of direct services

EMAIL

Organisations continue to be reliant on receiving information via email. It is generally perceived as accessible and provides a traceable audit trail. While organisations highlight some innovations that have made email communications from Code Administrators more manageable, there is a view that more can be done to streamline information sent via email.
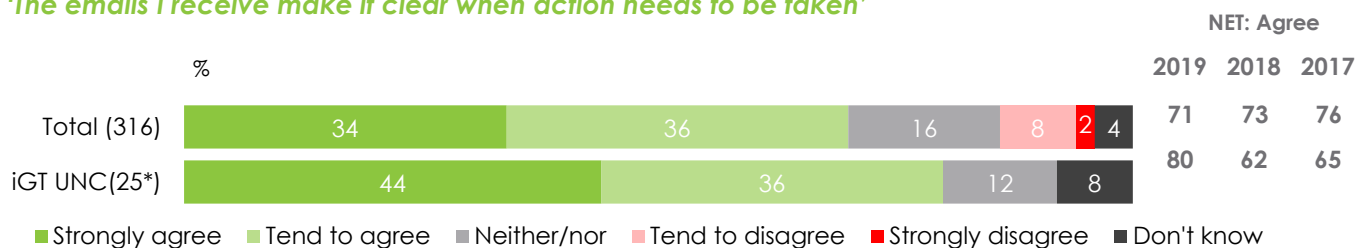
Organisations value email communications that are succinct, clear and give direction on the action (if any) that they may need to take as a result. Some organisations called for more dynamic provision of information; with email used to provide topline information and complementing digital platforms used as repositories for more detailed information.

On the whole, Gemserv's emails in relation to the iGT UNC command a positive opinion. They are perceived to be easy to understand (76% agree, 19 of 25 respondents receiving emails) and make it clear when action needs to be taken (80% agree, 20 respondents). Additionally, 68% disagree that it's unclear if the emails in respect of the iGT UNC are relevant to their organisation (17 respondents). As with other codes, Gemserv could improve these scores by simplifying and tailoring information for different types of organisations.

'The emails I receive are easy to understand'

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	**NET: Agree** 2019	2018	2017
%									
Total (316)	29	38	15	10	6	3	**66**	**73**	**73**
iGT UNC (25*)	56	20	16			8	**76**	**69**	**62**

'The emails I receive make it clear when action needs to be taken'

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	**NET: Agree** 2019	2018	2017
%									
Total (316)	34	36	16	8	2	4	**71**	**73**	**76**
iGT UNC(25*)	44	36	12			8	**80**	**62**	**65**

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

*Low base

Q19. To what extent do you agree or disagree with the following in relation to the <code/codes>? Base: All responses for those receiving information from code administrator (number of responses shown in brackets).

The positive sentiment, shown by the data, was also reflected by organisations' feedback:

"They have emails but they don't send that many so I don't feel overwhelmed."

"You get a round up email that tells you about everything that has been sent. They are dynamic."
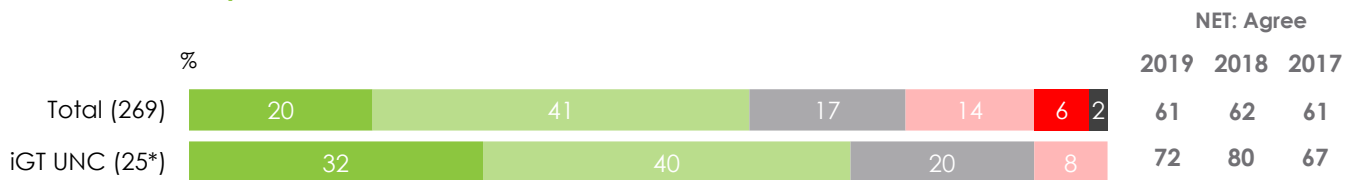
WEBSITES

Websites remain important for most organisations. They are seen as a vital resource for keeping up to date with various code changes and general information related to the code. Information included on websites can be insightful, providing businesses with the depth of understanding they require to navigate codes.
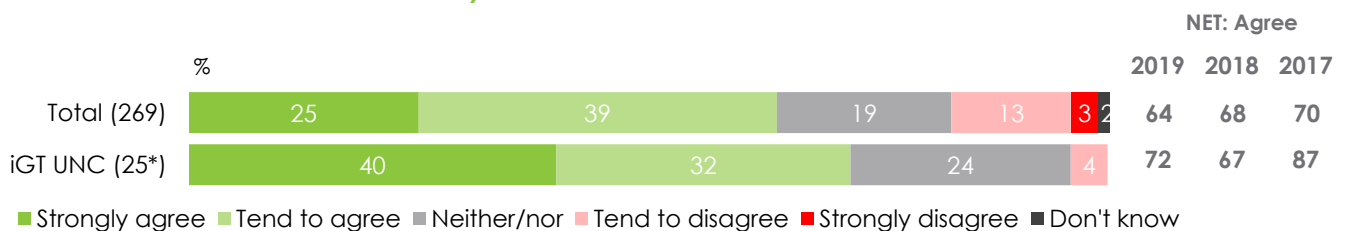
Customers feel it is critical that information that is on websites is kept up to date and is also easy to find. This continues to be an area that most Code Administrators need to work on; at an overall level, 61% indicate they are able to easily find information on the website.

In 2019, seventy one percent of organisations who have interactions with the iGT UNC indicated they used the website (25 respondents). Ratings of Gemserv's iGT UNC website are high, 72% consider the information to be easy to find (18 respondents), and the same percentage also say it is easy to understand, which is slightly higher than last year.

'I am able to easily find information on the website'

							NET: Agree		
%							2019	2018	2017
Total (269)	20	41	17	14	6	2	61	62	61
iGT UNC (25*)	32	40	20	8			72	80	67

'The information on the website is easy to understand'

							NET: Agree		
%							2019	2018	2017
Total (269)	25	39	19	13	3	2	64	68	70
iGT UNC (25*)	40	32	24	4			72	67	87

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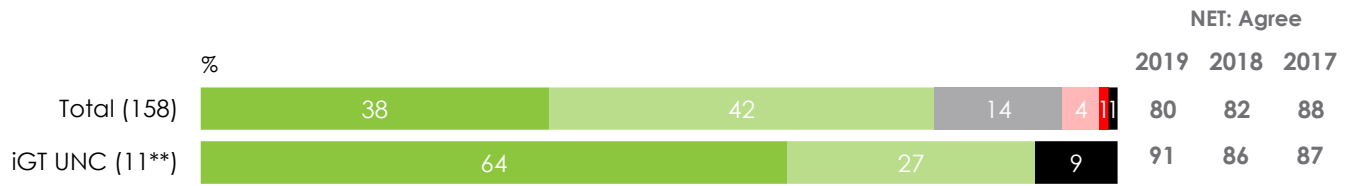
*Low base

Q20. 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 (number of responses shown in brackets).

MEETINGS

At an overall level, 42% have attended a meeting or workshop in relation to the code they interact with. Thirty one percent (11 respondents) have attended an iGT UNC meeting.

Of the eleven people attending a meeting most agree that facilities are fit for purpose and the materials that they receive prior to the meeting provide them with enough information about the objectives. There is majority agreement that it is easy to actively participate in the discussion and teleconference facilities are fit for purpose.

'It is easy for me to actively participate in the discussion'

						NET: Agree		
%						**2019**	**2018**	**2017**
Total (158)	38	42	14	4	1 1	**80**	**82**	**88**
iGT UNC (11**)	64	27			9	**91**	**86**	**87**

'The materials that I receive prior to the meeting(s) provide me with enough information about the objectives'

						NET: Agree		
%						**2019**	**2018**	**2017**
Total (158)	35	46	9	6	3 1	**80**	**84**	**88**
iGT UNC (11**)	55	27	9		9	**82**	**86**	**100**

'Teleconference facilities are fit for purpose'

						NET: Agree		
%						**2019**	**2018**	**2017**
Total (158)	22	42	17	9	2 8	**65**	**60**	**56**
iGT UNC(11**)	27	55	18			**82**	**57**	**88**

■ Strongly agree ■ Tend to agree ■ Neither/nor ■ Tend to disagree ■ Strongly disagree ■ Don't know
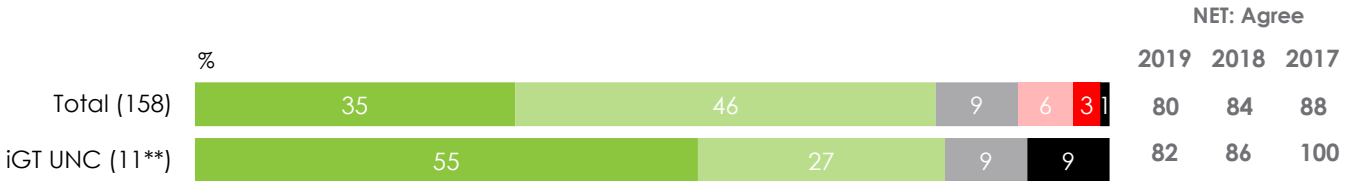
**Very low base

Q22. To what extent do you agree or disagree with the following in relation to the <code/codes>? Base: All responses for those attending meetings (number of responses shown in brackets).
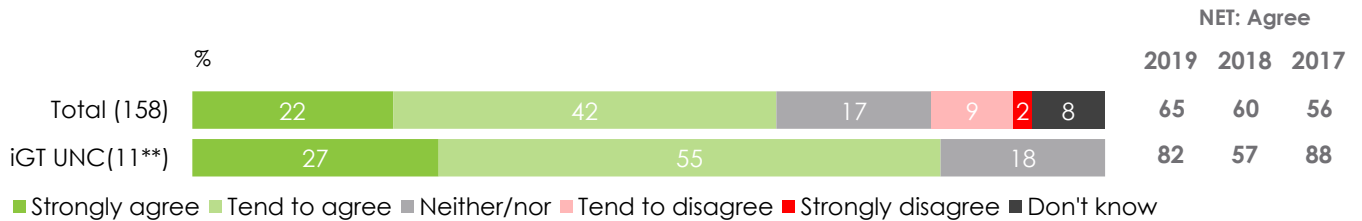

RAISING AND UNDERSTANDING MODIFICATIONS

Two out of thirty five people had raised a modification in relation to the iGT UNC in the last 12 months (six percent), both claimed the process was easy.

Overall, we see a decline in organisations saying they are satisfied with the support their Code Administrator gives them to understand what modifications mean for them.

Forty percent of customers are satisfied with the support given to help understand the meanings of modifications (14 respondents). Organisations found Gemserv to be helpful and collaborative in this area.

						NET: Satisfied		
%						**2019**	**2018**	**2017**
Total (376)	14	27	50	9	2	**40**	**56**	**52**
iGT UNC (35)	17	23	57	3		**40**	**47**	**50**

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

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 code (number of responses shown in brackets).

ACCESSION PROCESS

Four people are employed by organisations who became party to, or began the process to become party to, the iGT UNC in the last five years. Of these, three found the process easy and one found the process fairly difficult. An organisation provided a specific area for improvement:

"They could do better to inform their members of new members and provide a point of contact."

Conclusions

Gemserv continues to perform well on the majority of aspects of service provision in relation to iGT UNC particularly around emails ensuring it is clear when action is required and the meetings provided.

Overall satisfaction with the service received is in line with the industry average and a significant minority say that the service has improved.

One area to potentially improve is perceptions around the support available from Gemserv generally and specifically in helping organisations to understand modifications raised by others.