

# CODE ADMINISTRATORS SURVEY 2019

REPORT

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# EXECUTIVE SUMMARY

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1

After the gains seen in 2018, in 2019 respondents are less complimentary about various aspects of service they receive in relation to codes

2

As Code Administrators' innovations and improvements implemented off the back of the recommendations from 2017 embed, the initial positivity we saw in 2018 has reverted back to 2017 levels. In 2019, organisations are again looking at aspects of the service that are not meeting their expectations

3

There are spontaneous mentions of the Code Administration Code of Practice (CACoP) \*and its remit. Specifically, there is a view that aspects of Code Administrators' service delivery should be unified and the role of the CACoP needs to be more formalised

4

In 2019 we continue to see a narrowing of experiences between small and large organisations, with the latter indicating that although they may be part of a much bigger group they too can have access to very limited resource

5

Overall satisfaction with the service provided by Code Administrators has declined over the last year. Correspondingly, performance around critical aspects that drive satisfaction like provision of support have also declined



A photograph of industrial pipes supported by concrete pillars. The scene is lit by a low sun, creating a warm, golden glow and long shadows. The pipes are dark and reflective, showing the texture of the concrete and the sky. The sky transitions from a pale yellow near the horizon to a clear blue at the top. A solid pink vertical bar is on the left side of the image.

# 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 not intended to take account of the relative funding of the Code Administrators (CA), or whether they offer value for money

SINCE INCEPTION IN 2017, THE STUDY HAS BEEN REPEATED TO MONITOR PERFORMANCE AND IDENTIFY ANY NEW DEVELOPMENTS. SPECIFICALLY, THE SURVEY HAS BEEN DEVELOPED TO:

1

## IDENTIFY

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

2

## MEASURE

Overall performance of CA on key metrics:

- Overall satisfaction
- Support
- Communications
- Modification process

3

## ACCESS

Specific aspects of service delivery:

- Email
- Websites
- Meetings
- Accession process

# METHOD

## MIXED MODE PROGRAMME OF RESEARCH AMONG ORGANISATIONS INTERACTING WITH CODES

### FRAMING INTERVIEWS TO INFORM QUESTIONNAIRE DESIGN



5 in-depth interviews

**Fieldwork date:**  
27<sup>th</sup> May – 7<sup>th</sup> June  
2019

### CORE SURVEY TO MEASURE EXPERIENCE AND PERFORMANCE OF CAS



203 surveys  
in total



111 telephone participants

92 online participants

**Fieldwork date:**  
17<sup>th</sup> June – 12<sup>th</sup> July 2019

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



25 follow-up in-depth interviews

**Fieldwork date:**  
15 July – 2 August  
2019

# ONLINE AND TELEPHONE APPROACH

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



# INTERVIEWS ACHIEVED

- A total of **203** unique interviews were completed
- Many organisations interact with more than one code and it was considered too onerous for them to answer the survey on every relevant code
- Organisations were asked specific code-related questions for a maximum of 2 codes which were selected on a hierarchy basis to ensure optimum coverage of all codes (dependent on initial sample available). Overall **376** code specific responses were obtained
- This means some may have been asked about codes they interact with even if they were not in the sample file provided by the corresponding Code Administrator

Interviews achieved by code:

BSC	CUSC	DCode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC	UNC
37	35	36	36	37	35	36	36	37	16*	35

The Code Administrators' customer universe is relatively small; as such, the sample achieved at a code level is also low. Some of the fluctuations seen in the year on year code level results are driven by the low sample sizes. It is therefore important to read results with a degree of caution; where there are statistically significant differences between 2018 and 2019, these are explicitly stated.

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

\*Denotes low base

# INTERPRETING RESULTS

Throughout the report, Code level results are shown side by side. Results are not meant to be compared, instead they provide a read of ratings for all codes in a single place. By their very nature, codes are different:

- Some are more technical than others
- Others are more commercial
- The level of funding varies by code

These differences mean that the governance processes and the role of the code administrator varies by code and therefore the level of service provided is not consistent and therefore cannot be directly compared

# KEY

## Data presentation

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

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

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

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

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

## Statistical difference between sub samples

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

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

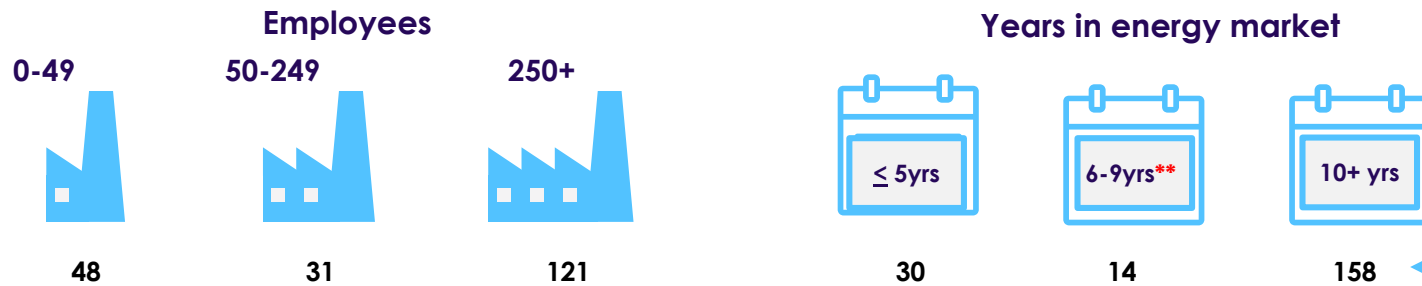
NET refers to the combined figure of the top or bottom 2 measures



# 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

Interviews achieved by type:



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

- 61% of companies with 0-49 employees have been operating for 6+ years so, as in 2017, we are showing sub-group data for both company size and length of experience as 'small company' does not necessarily mean 'new company'

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



# INDUSTRY CONTEXT

# ORGANISATIONS CONTINUE TO ACKNOWLEDGE THAT CODES ARE COMPLEX. HOWEVER THERE IS A BELIEF THAT MORE CAN BE DONE TO SIMPLIFY PROCESSES

THERE IS A PERCEPTION THAT CACoP SHOULD LEAD THE WAY IN CHANGES

While the environment is challenging, organisations believe **CACoP needs to be reviewed** – it has the opportunity to play a greater role in bringing Code Administrators together, e.g. it could:

- Benefit from having its own website
- Provide greater guidance around uniformity of information provision
- Offer some consistency around the amount of support Code Administrators provide around modification process
- Provide a weekly cross-code round-up of changes and their impact on organisations

“We have created a too complex industry across the board. I think if there was **a central repository** on all codes it would just make managing them far easier so you can see how they are interacting with one another. The need to move with the times and get **more digital less bureaucracy.**”

“All three codes operate differently. In this regard **they are not following the CACoP.**”

“The **CACoP does not go wide enough**, it needs to have a comms strategy, webinars.”

“From a CACoP perspective it would be better if there was **more direction on synergies** and making sure that experience between the different codes is not so vastly different. It's more a case of 'if one has had a good idea then it benefits others. Let's make it collaborative.”



# THERE ARE SOME BROAD AND CROSS CUTTING ISSUES IDENTIFIED

- We see a narrowing of reported **challenges** between larger organisations and smaller ones
  - Both small and larger organisations indicate that they are reliant on consultants as they are finding it difficult to disseminate/understand information
- **Websites** are essential and used frequently by organisations – general perceptions of information on websites is good, however there are aspects that could be improved:
  - Information needs to be accurate and up-to-date
  - Navigation could be more intuitive in places with information better organised
  - Search functions could be optimised
  - Better visualisation of information
- There is a view that **Cross Code working** is not working effectively
  - There is a perception that Code Administrators are sometimes in competition with one another so it is not always in their interest to collaborate
  - Some organisations feel Code Administrators are still working in silos; and there is no consistency in the customer experience
  - There is a call for the integration of the accession process. Organisations often have to give the same information in inconsistent formats for the different codes

“A lot of those employees are not in energy. So although we are large, when it comes to **engagement with Code Administrators it is difficult.**”

“I **use websites extensively.** If you want to look at a **particular change**, it is useful. I also tend to use them to look at the next **meetings.**”

# THERE ARE SOME BROAD AND CROSS CUTTING ISSUES IDENTIFIED

- Smaller organisations would like a **better on-boarding process** to include:
  - Better signposting to vital information sources
  - Greater clarity on lines of responsibility
  - More directive communications so that organisations know what actions they need to take as a result
- **Email comms** continue to present some challenges for businesses
  - Perception that emails can be too broad. Organisations want to know upfront **who** the email is intended for, **what** they need to do as a result, and **when** they need to do it by so that they can disseminate the information more efficiently
  - There is a perception that information can be too technical. Call for **greater clarity** – plain English, unambiguous language, explain any technical aspects
  - More summary documents – **less is more**
- Some organisations feel their customer experience would be improved if they had access to a **direct contact** rather than having to go through email
- There is also a perception that Code Administrators should feel **more empowered** to hold organisations to account if they miss deadlines set by the CAs (e.g. submission or meeting dates).
- Sensitivities remain regarding **National Grid Electricity System Operator (NGESO)**; with the perception that their **dual role** presents a conflict in commercial interest

“CAs could do more to support small parties. We receive lots of communication from them but they **don't provide on boarding support**, guidance documents, nor training. This could make it easier for us to understand the codes and their status.”

“When they communicate about modifications, it would be **useful to know the relevance of the modification on our business**. We have limited time and can't look at everything. It would be good if they'd **attention it as 'only relevant/ important to.'**”

“With some codes I **don't have a contact** I can speak to like I do for other codes. We don't have that personal relationship. At the moment we have to call a general phone number, and we don't often get through to the right person...It would help for discrepancy and to answer our questions. **Sometimes a 5 minute chat helps a lot.**”





# KEY FINDINGS





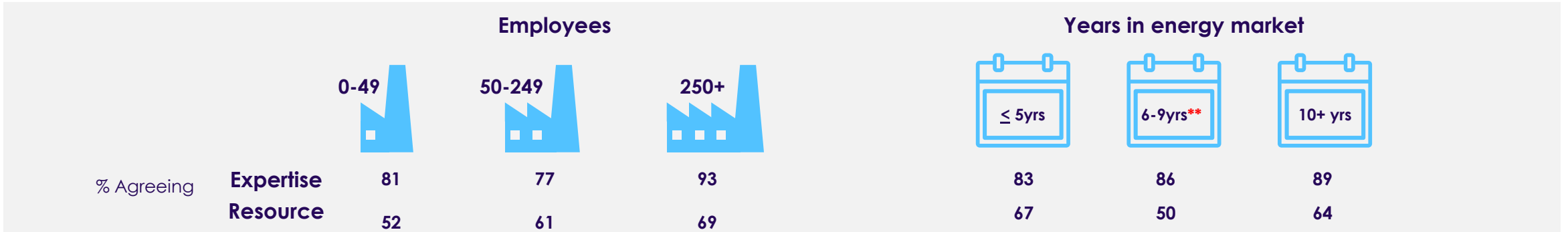
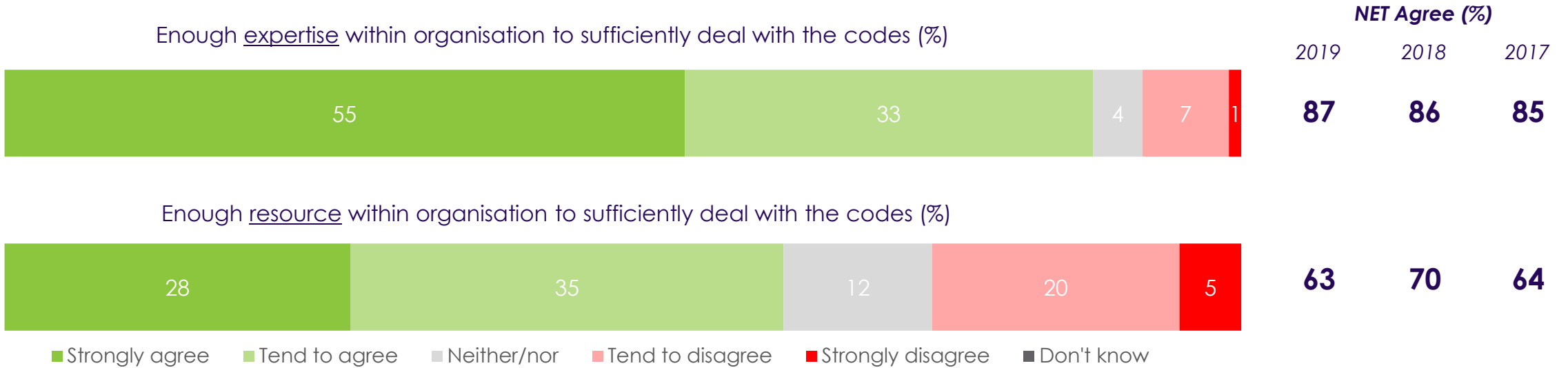


# ORGANISATION PROFILING



# EXPERTISE AND RESOURCE

THE MAJORITY OF INDIVIDUALS AGREE THEIR ORGANISATION HAS THE EXPERTISE TO DEAL WITH CODES. HOWEVER AVAILABILITY OF RESOURCE CONTINUES TO BE AN ISSUE FOR SOME



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 (203)

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 (203)

Significantly lower/higher vs. 2018

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

# EXPERTISE AND RESOURCE

IN 2019 WE SEE FEWER DIFFERENCES DRIVEN BY SIZE AND AVAILABILITY OF RESOURCE, HOWEVER THERE IS EVIDENCE THAT SMALLER ORGANISATIONS MAY NEED MORE SUPPORT

“I can imagine it is more difficult for smaller suppliers. When I attend meetings, there's **not a lot of representation from small suppliers**. They probably don't have the resources, or don't believe in code compliance's importance for their business and therefore there is a lack engagement. Code Administrators need to make an effort in engaging with them, because I am sure they have a lot to bring to the table.”

“You have to be very experienced in understanding how to raise a proposal or modification. **New entrants or those new to a code require more support.**”

“Smart energy code is huge, too big. **No problem understanding the code.** But physically it is too big for one person to go through it or know it. We are different people within our business dealing with a specific part of that code. One person cannot do it all.”

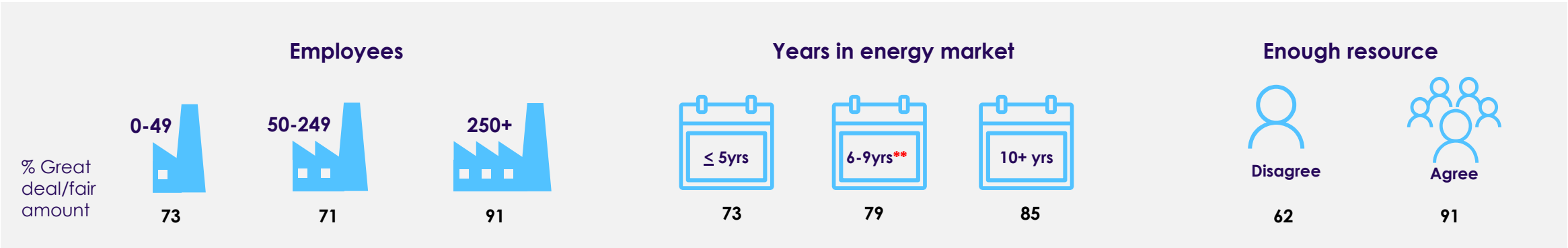
## Resource

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

Organisations with the resource tend to have multiple people working on different aspects of one code. Those with less resource; therefore want the Code Administrators to provide them with easy to digest information and guidelines so that they can stay on top of the various governance and changes to codes

# KNOWLEDGE OF CODE ADMINISTRATOR RESPONSIBILITIES

IN LINE WITH 2018, THE MAJORITY OF ORGANISATIONS CLAIM TO HAVE AT LEAST A FAIR AMOUNT OF KNOWLEDGE ABOUT THE RESPONSIBILITIES OF CODE ADMINISTRATORS



Q4. Thinking generally, how much do you know about what the responsibilities of your code administrator(s) are? Base: All respondents (203)

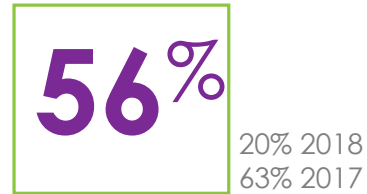
\*small base size  
\*\*very small base size } interpret with caution

Significantly lower/higher vs. 2018

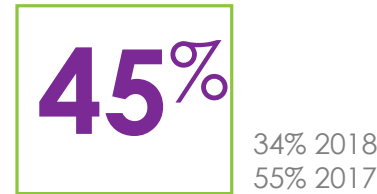


# PERSONAL INTERACTION WITH CODE

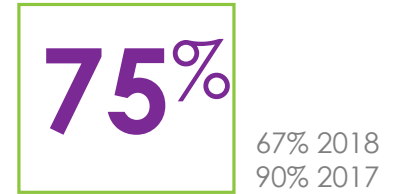
THE FLUCTUATION SEEN YEAR ON YEAR IS LIKELY TO BE DRIVEN BY INTERNAL PRIORITIES WITHIN ORGANISATIONS



I have strategic overview of the code



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



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

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

Q6/Q6b. And, how long have you personally been interacting with the <code> code including your experience in any previous roles or organisations? Base: All responses for those involved with the code (376)

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 (376)

  Significantly lower/higher vs. 2018

KPIs



# PERCEIVED IMPROVEMENTS

## ORGANISATIONS CONTINUE TO HIGHLIGHT SOME IMPROVEMENTS IN THE SERVICE DELIVERED BY CODE ADMINISTRATORS

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



### By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net improved	%	14	26	19	25	5	20	17	25	24	25	6
Net worsened	%	8	11	0	0	14	0	8	3	0	6	9

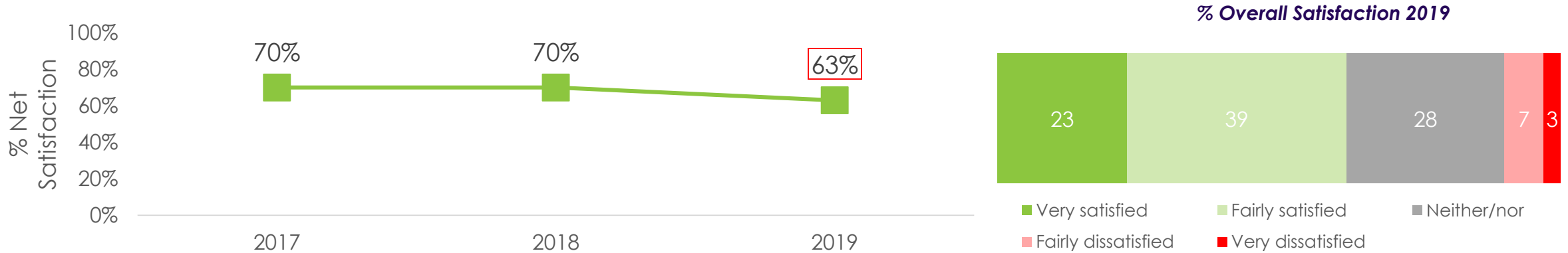
Q29b. Thinking about the service that you have received in relation to the <code> in the last year, would you say it has improved, remained the same or got worse?  
Base: All responses (376)

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



# OVERALL SATISFACTION

HOWEVER THERE HAS BEEN A NOTABLE DECLINE IN REPORTED OVERALL SATISFACTION WITH THE SERVICE DELIVERED



## By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	86	43	64	72	46	63	75	50	65	44	69
Net dissatisfied	%	5	23	3	11	27	0	6	8	5	6	9

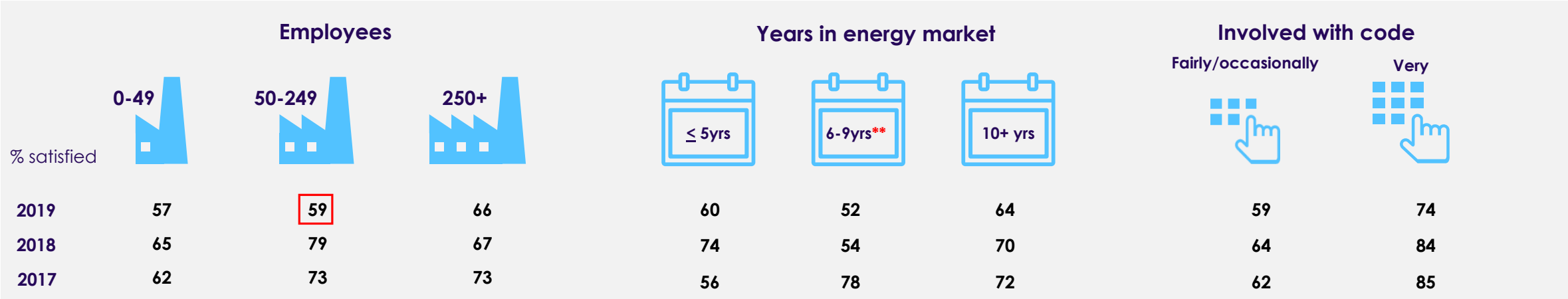
    Significantly lower/higher vs. 2018

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 (376)

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

# OVERALL SATISFACTION

SATISFACTION LEVELS HAVE SEEN A DIRECTIONAL DECLINE FOR SOME GROUPS



- Satisfaction levels have declined for small and particularly medium sized organisations
- Those who are very involved with codes continue to be more satisfied overall (74%) compared to those with less involvement (59%)

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 (376)

Significantly lower/higher vs. 2018

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

# OVERALL SATISFACTION

## ORGANISATIONS CONTINUE TO CONSIDER MANY FACTORS WHEN RATING THEIR EXPERIENCE WITH CODE ADMINISTRATORS

Organisations recognise the complexity of the system and feel that it is right that the process is stringent. They also acknowledge that CAs are supporting them to navigate the system.

There is a perception that OFGEM actions can further complicate an already challenging landscape.

The modification process remains a challenging area for businesses. It's essential that CAs maintain clear, easy to follow and accurate documentation.

Organisations raise some concerns around CAs expertise. Perception that this is as a result of high staff turnover which means CA are losing their "corporate memory".

"It would be **good to have less Code Administrators**: the industry would work more efficiently, would be easier to switch new customers, because **what we want is that the process is smooth and reliable.**"

"There should be **more direct contact from OFGEM** itself. More communication about certain decisions."

"Ofgem needs to recognise that the customers on **large industrial sites are important too**. Don't just focus on domestic customers."

"More **support in raising proposals** – current set up is that you have to be very experienced in understanding how to raise a proposal or modification. If you are a new entrant to the market or a company that has just acquired a gas asset – I don't think there is enough support for these people."

"Part of their problem is that they are very good to their staff at getting lots and lots of experiences. **Everybody does a job for 6 months, one year and then they move to another job** and then another which is great on a personal development point of view but for anyone in the industry wanting to talk to them, that means you are consistently talking to new people. I think they need to keep the same people because they are **losing the corporate memory**"

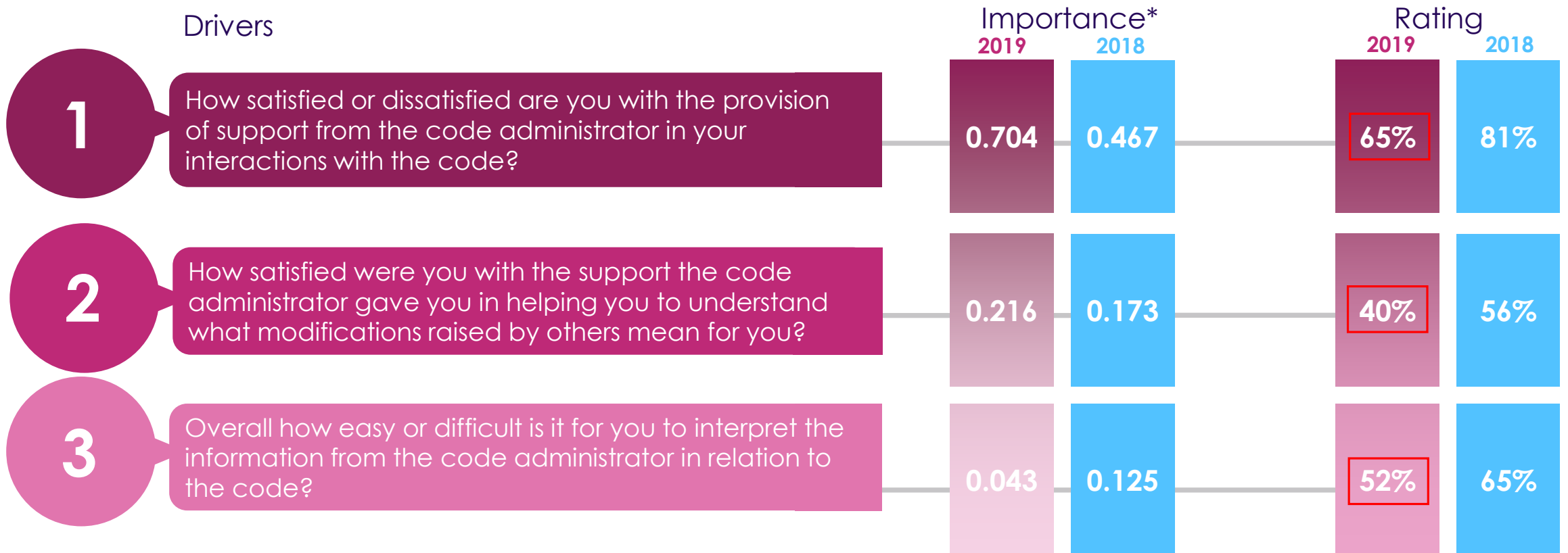
The need for CAs to continue to act as critical friend should not be underestimated. Organisations feel that the alternative would be for them to employ solicitors to deal with the various aspects which would be too costly.



# KEY DRIVER ANALYSIS

THREE SERVICE ASPECTS CONTINUE TO HAVE THE LARGEST IMPACT ON OVERALL SATISFACTION, WITH THE PROVISION OF SUPPORT BECOMING INCREASINGLY IMPORTANT

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.



\* 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.)

Significantly lower/higher vs. 2018

# KEY DRIVER ANALYSIS

PERFORMANCE HAS DECLINED FOR ALL THREE ASPECTS OF SERVICE THAT HAVE THE BIGGEST IMPACT ON OVERALL SATISFACTION

1

After the gains we saw in 2018, organisations are now less positive about the provision of support they receive when interacting with codes. This is an area of focus as it has become increasingly important in driving overall satisfaction

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

2

We see a decline in reported satisfaction with the support CAs provide in helping organisations understand what modifications raised by others mean for them. Whilst this area has less of an impact in driving overall satisfaction; the modification process is highlighted as a challenging area by organisations

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?

3

After the positive uplift seen in 2018 with regards to ease of interpreting information, 2019 sees a decline in this KPI. However the relative importance of this KPI in driving overall satisfaction has halved this year.

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

# REASONS FOR SATISFACTION

IN 2019, WE SEE SIMILAR THEMES (AS IN 2018) SPECIFICALLY MENTIONED AS VITAL TO CUSTOMER 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

02

Receiving information which is easily identifiable as relevant to their organisation

03

Easy to navigate websites as well as **accuracy** of information



“The technical assistance we get on the modification process is very helpful. They also have the critical friend which is independent so they are able to give constructive critics. This is very important to us.”



The sheer volume that comes out is what it is. There is a lot going on and there is a lot of information that you have to filter.

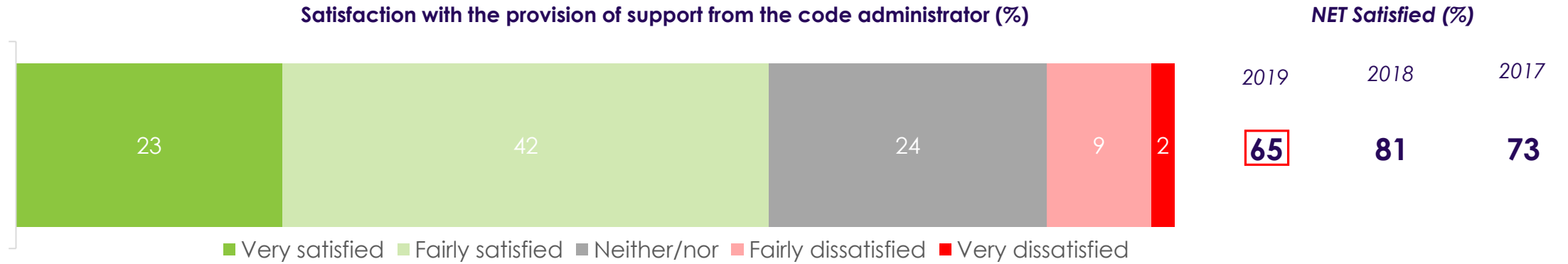


“Navigating consultations or live modifications...In reality this should be most important part of the website.”



# SATISFACTION WITH THE 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



By code

□ □ Significantly lower/higher vs. 2018

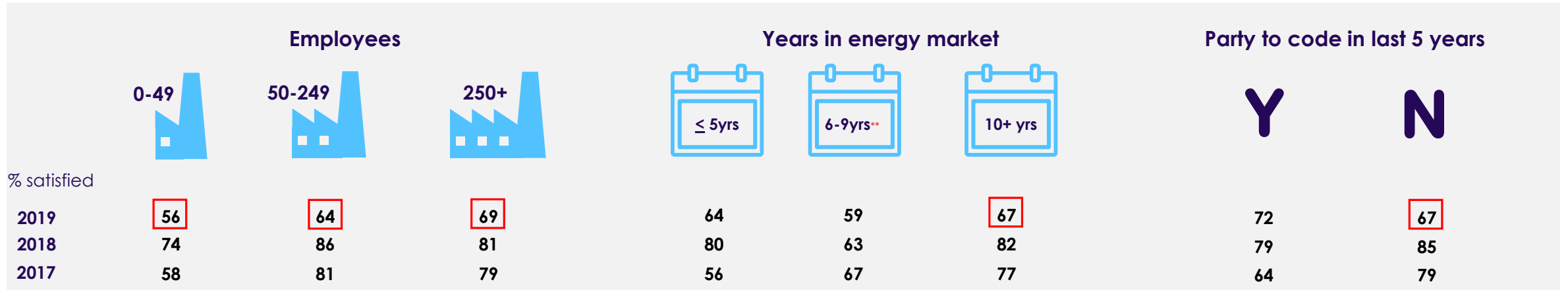
		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	83	60	59	69	50	61	72	64	66	64	70
Net dissatisfied	%	6	23	6	13	26	3	6	9	6	7	15

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 (347)

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

# SATISFACTION WITH THE PROVISION OF SUPPORT

THE DROP IN SATISFACTION WITH SUPPORT RECEIVED IS NOT ONLY EVIDENT AMONG THOSE NEW TO THE CODES BUT ALSO AMONG THE MORE EXPERIENCED ORGANISATIONS



- Satisfaction with provision has significantly declined for small, medium and large organisations
- Businesses who have been in the market for 10+ years report significant declines in the level of satisfaction with support received by Code Administrators

“More background to some of the modifications would be helpful e.g. they do tend to explain ‘who’ it will affect, but they don’t necessarily explain ‘why’. This would be really useful especially for smaller suppliers who don’t have the resources to go through everything in detail.”

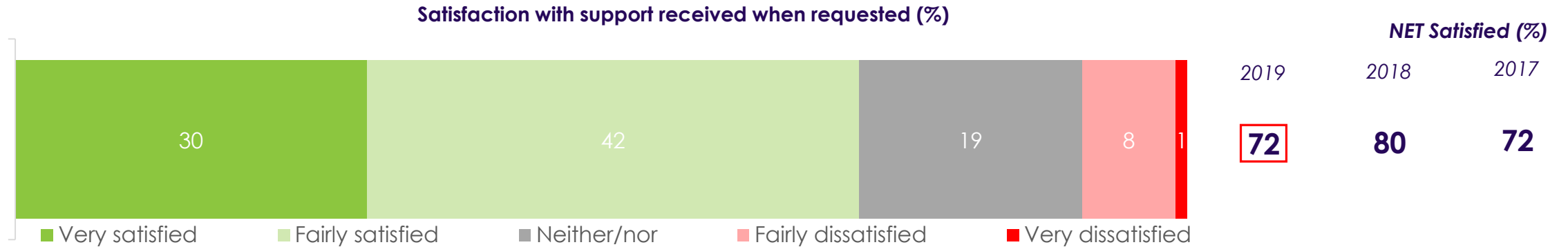
Q11a/Q11c. How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the <code>? Base: All responses for those involved with the code (347)

    Significantly lower/higher vs. 2018

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

# SATISFACTION WITH SUPPORT RECEIVED WHEN REQUESTED

ORGANISATIONS ARE GENERALLY SATISFIED WITH THE LEVELS OF SUPPORT RECEIVED WHEN REQUESTED, ALTHOUGH IMPROVEMENTS NOTED IN 2018 HAVE NOT HELD



## By code

    Significantly lower/higher vs. 2018

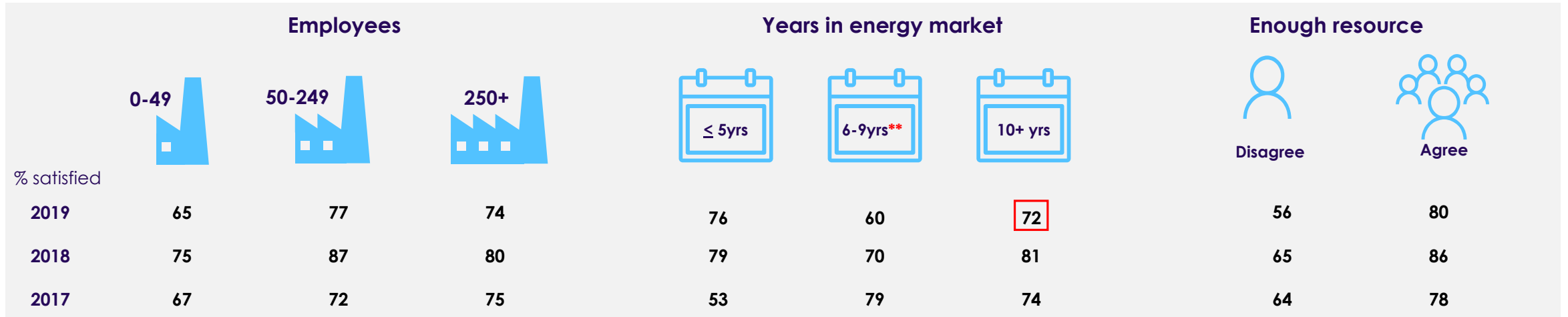
		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	86	57	64	87	50	79	84	72	77	57	70
Net dissatisfied	%	5	13	9	3	24	4	6	7	10	7	9

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 (331)

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

# SATISFACTION WITH SUPPORT RECEIVED WHEN REQUESTED

IN 2019 WE SEE LITTLE DIFFERENTIATION BY SIZE



The level of resource available to organisations is a key lever of satisfaction

- Only 56% of organisations who claim they do not have enough resource are satisfied with the support they receive when requested compared to 80% of organisations with enough resource

More established organisations report the biggest decline in satisfaction with support received when they request it

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 (331)

Significantly lower/higher vs. 2018  
\*small base size  
\*\*very small base size
}
 interpret with caution





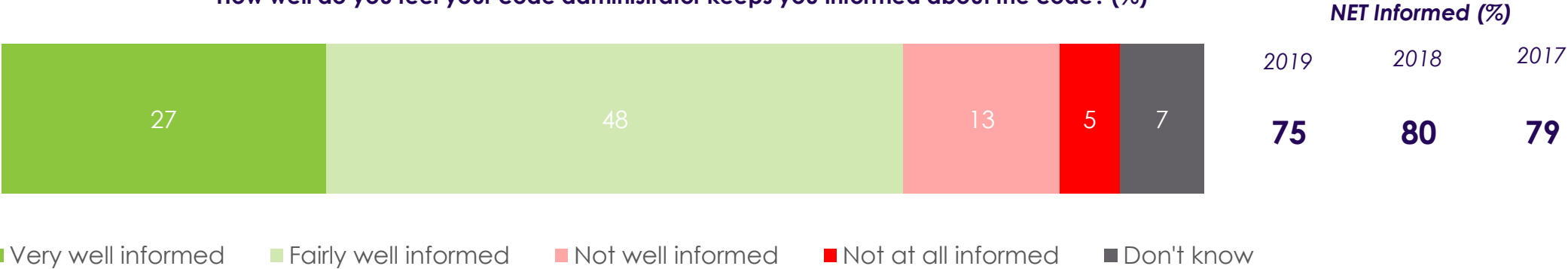
## IN DETAIL

Perceptions of  
information  
provision

# KEPT INFORMED ABOUT THE CODE

THE MAJORITY OF INDIVIDUALS FEEL THEY ARE KEPT INFORMED ABOUT SPECIFIC CODES; WE HOWEVER SEE INDICATIONS OF DECLINE SINCE 2018, ALTHOUGH NOT SIGNIFICANT

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



## By code

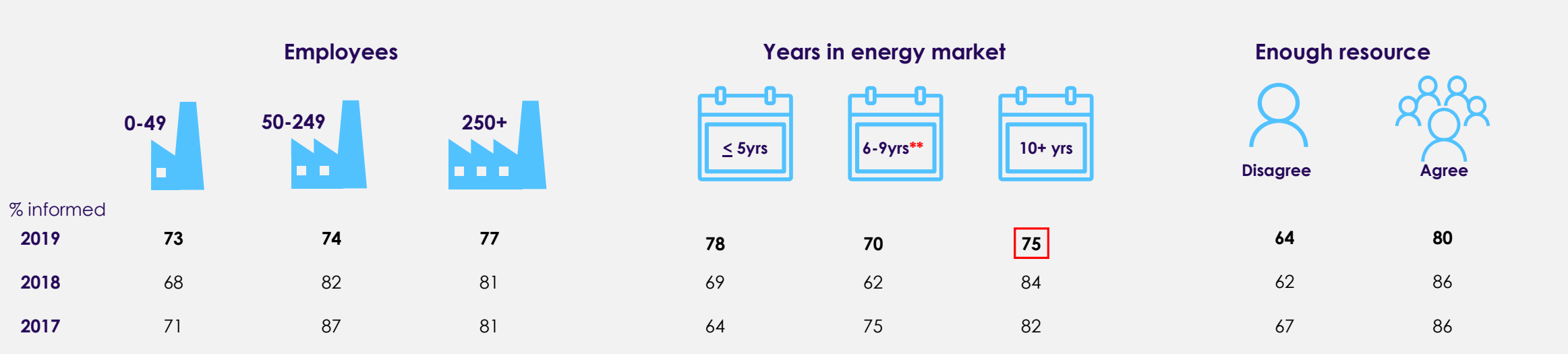
		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net informed	%	92	63	81	81	65	74	69	75	76	81	74
Net not informed	%	5	29	17	11	32	17	22	14	14	13	17

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 (376)

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

# KEPT INFORMED ABOUT THE CODE

THE MORE ESTABLISHED BUSINESSES ARE LESS LIKELY TO FEEL THEY HAVE BEEN KEPT WELL INFORMED ABOUT THE CODES COMPARED TO PREVIOUS YEARS



- As seen in previous years, organisations indicating they have limited resource, are less likely to claim they are kept well informed by they Code Administrators (64% compared to 80% among those with enough resource)

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 (376)

Significantly lower/higher vs. 2018  
\*small base size  
\*\*very small base size } interpret with caution

## KEPT INFORMED ABOUT THE CODE

There is a perception that information provision could be better aligned

Organisations report that there is still some way to go before Code Administrators are fully collaborative in the way that cross-cutting information is disseminated

Introducing a CACoP website would go some way in engendering cross-code working and would provide a one stop shop for organisations

“I am having to hire consultants to find out what it means to me. The people who are the **custodians should be able to tell us what it means for us.**”

“When Ofgem are looking at what they need to change in terms of modifications, they need to **take care on how they conduct the impact assessment.**”

“Issues could have been avoided if they (CAs) had set this up as a **proper joint working group.** There is definitely a need to do a lessons learnt and see what we can learn from the way the process worked.

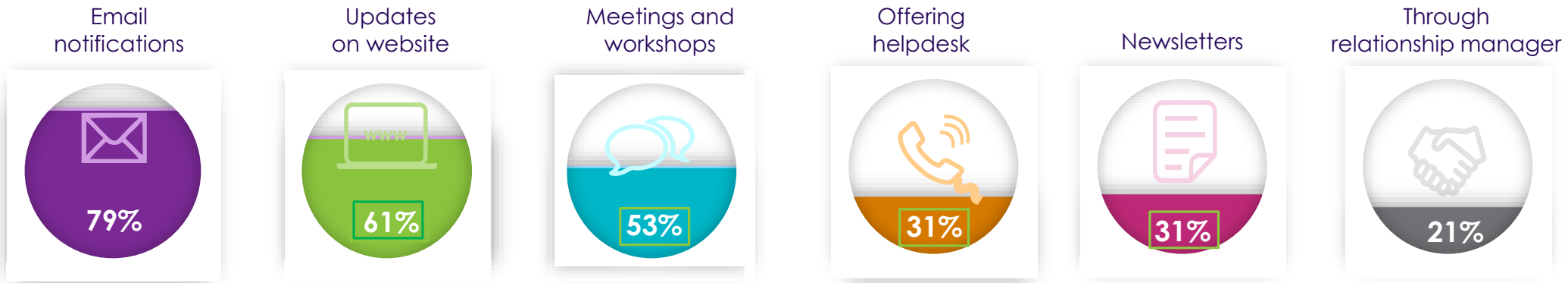
“Codes need to work better together to **improve the experience for customers.**”



# RECEIVING INFORMATION

ORGANISATIONS CONTINUE TO BE RELIANT ON A BROAD RANGE OF INFORMATION CHANNELS. WEBSITE USE AND MEETING ATTENDANCE HAS INCREASED OVER THE LAST YEAR

## Code administrator proactive support channels



## Support channels used by organisations



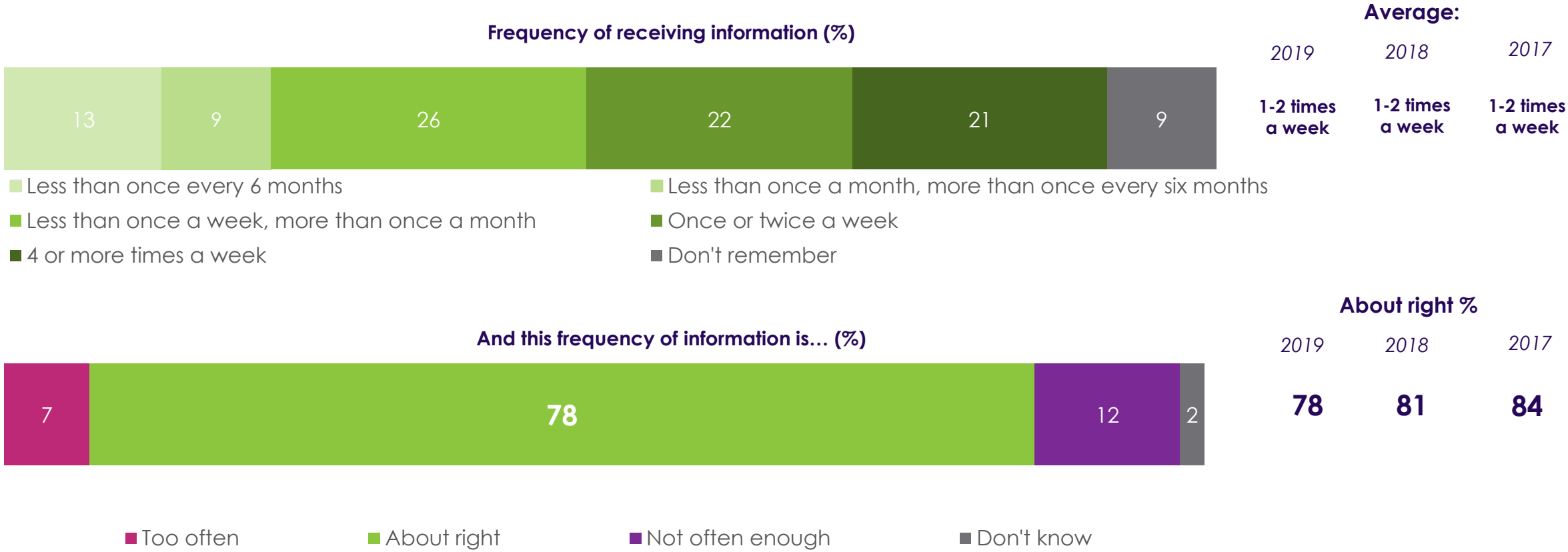
Q11/Q11b. How does your code administrator proactively support you in your interactions with the code?

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 (376)

Significantly lower/higher vs. 2018

# FREQUENCY OF RECEIVING INFORMATION FROM CODE ADMINISTRATOR

THE FREQUENCY OF RECEIVING INFORMATION FROM CODE ADMINISTRATORS IS STILL PERCEIVED AS ABOUT RIGHT; TYPICALLY 1-2 TIMES PER WEEK. THIS SAID; THERE IS A COHORT OF ORGANISATIONS WHO FEEL THEY COULD BENEFIT FROM MORE

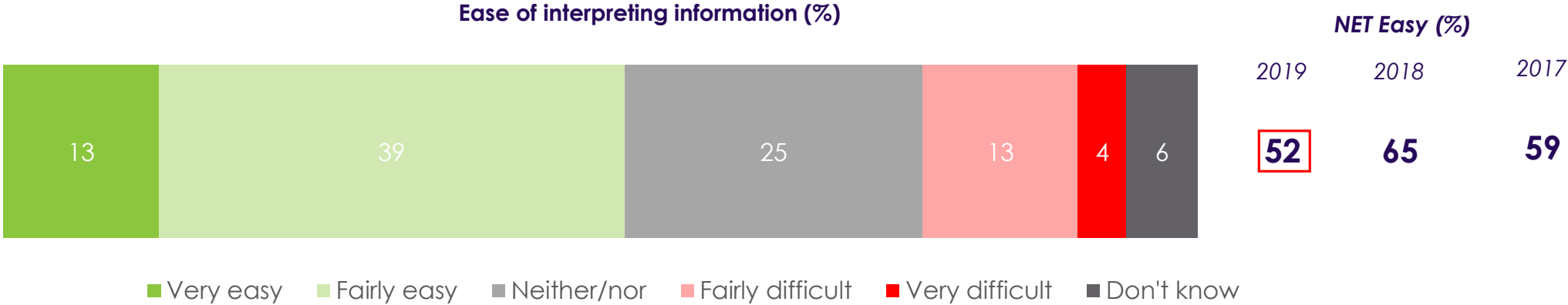


Q16/Q16b. How frequently do you receive information regarding any aspects of the <code> from your code administrator? Base: All responses for those involved with the code (376)  
 Q17/Q17b. And what do you think about this frequency of information in respect of the <code>? Base: All responses for those involved with the code receiving information (305)

40 ————   Significantly lower/higher vs. 2018

# EASE OF INTERPRETING INFORMATION FROM THE CODE ADMINISTRATOR

THERE IS A PERCEPTION THAT THE INFORMATION RECEIVED IS NOT ALWAYS EASY TO INTERPRET – IMPROVEMENTS SEEN IN 2018 HAVE NOT BEEN MAINTAINED



## By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net easy	%	65	29	56	58	35	57	61	53	62	38	51
Net difficult	%	16	29	17	8	27	3	14	22	8	13	23

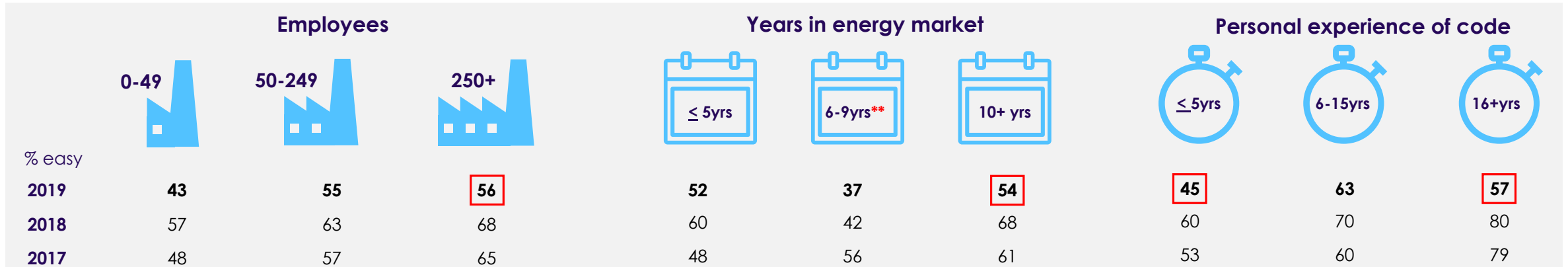
Q15/Q15b. Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to <code>? Base: All responses for those involved with the code (376)

41     Significantly lower/higher vs. 2018

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

# EASE OF INTERPRETING INFORMATION FROM THE CODE ADMINISTRATOR

LARGE ORGANISATIONS AND THOSE WITH MORE EXPERIENCE OF CODES REPORT LOWER SATISFACTION LEVELS WITH THE EASE OF INTERPRETING INFORMATION - THE GAP BETWEEN SMALLER AND LARGER ORGANISATIONS IS NARROWING



“Documentation is often written in old English, **not easy to decipher**. It’s clear its been written by a consultant.”

“Making **communication shorter and clearer**.”

“Provision of information could be more **user friendly, clear and easy to follow** for newer less experienced people e.g. more summary documents, we don’t want detailed minutes – rather **one pager explaining the issues, where we are and what is next**.”

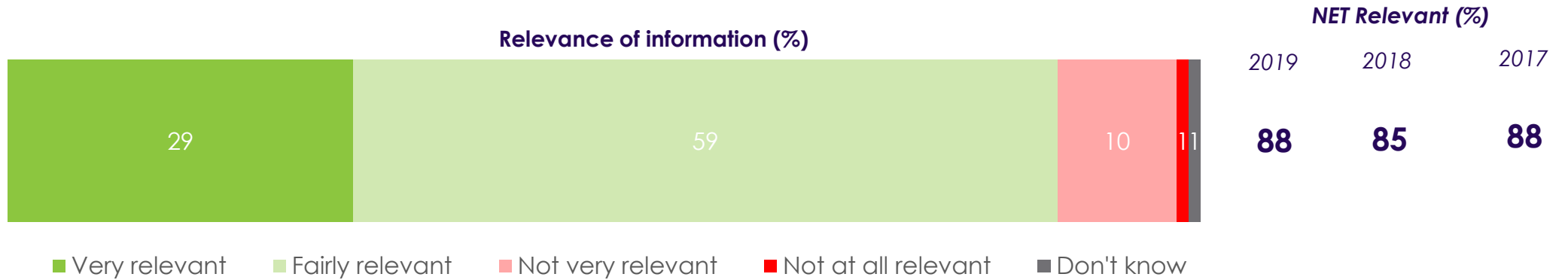
Significantly lower/higher vs. 2018

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



# RELEVANCE OF INFORMATION

ENCOURAGINGLY, THE MAJORITY CONTINUE TO AGREE THE INFORMATION THEY RECEIVE FROM CODE ADMINISTRATORS IS RELEVANT



## By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net relevant	%	88	79	94	87	76	96	90	81	100	90	91
Net not relevant	%	12	21	6	10	18	4	10	16	0	10	9

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 (305)

43 ———— □ □ Significantly lower/higher vs. 2018

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



IN DETAIL  
Perceptions of direct  
services

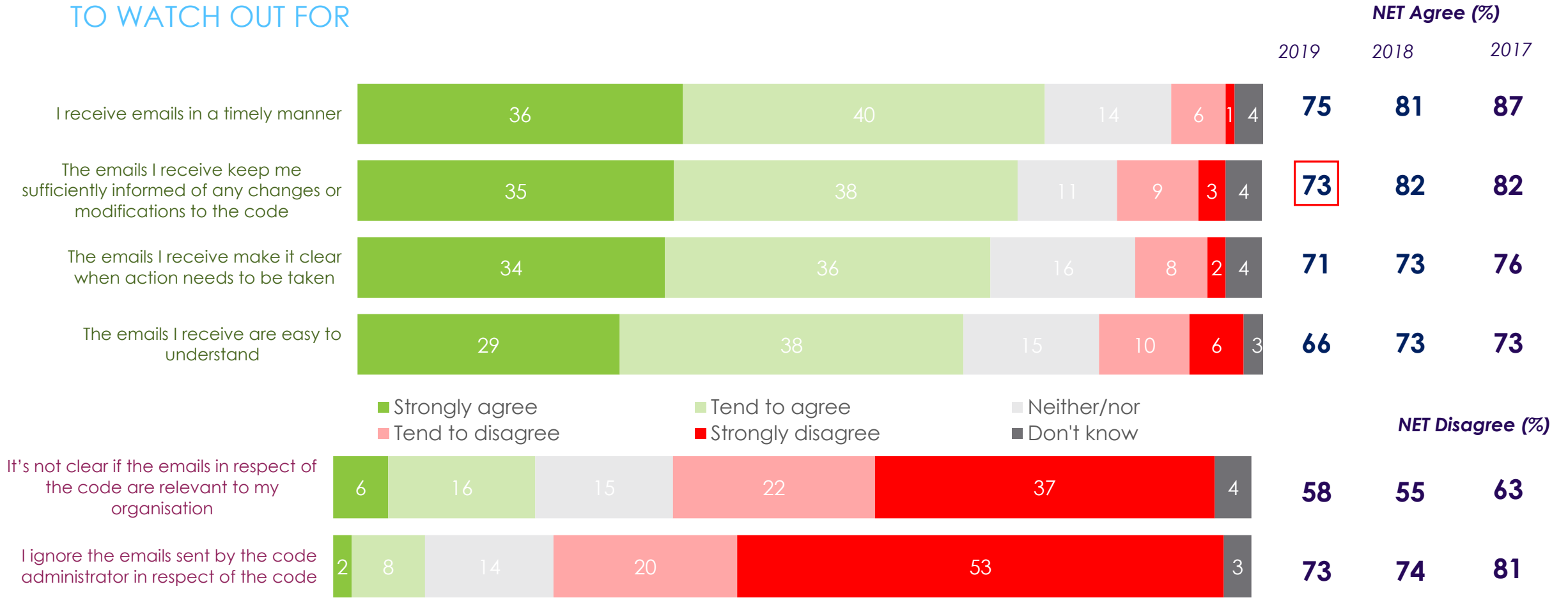
# DIRECT SERVICES

WHEN IT COMES TO INFORMATION DELIVERY, ORGANISATIONS ARE GENERALLY CONTENT WITH THE DIFFERENT CHANNELS – HOWEVER THERE ARE SOME AREAS WHICH COULD BE IMPROVED

- Emails are typically rated as being more effective than the information currently provided via websites. This said;
  - There has been a decline in businesses saying that the emails they receive keep them informed of any changes or modifications to the codes
  - One in five businesses do not think the emails are clear as to whether the information is relevant to them or not
- As was observed in previous years, websites receive mixed reviews, and given how essential they are to businesses, optimisation of websites should be a priority;
  - Areas which require the greatest attention include; being informed when updates are published; being clear about when actions need to be taken; and being clear about who the information is relevant to

# EMAIL

## EMAIL COMMUNICATIONS ARE GENERALLY GOOD, ALTHOUGH THERE ARE SOME DIRECTIONAL DECLINES TO WATCH OUT FOR



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 (316)

Significantly lower/higher vs. 2018



# EMAIL CONTINUES TO BE KEY FOR ORGANISATIONS



- Businesses value the information that they receive via email. They perceive it as critical in informing their operations
- As we have seen previously, there is a need for the information they receive to be clear, succinct and more directed
- While this is happening in places, there is a call for more work around making emails an easy to use and yet informative resource
- A call for smarter dissemination of information; others are already doing this
  - A round up email and newsletters are perceived as desirable

“Make the **emails more relevant** to individual organisation's. Try to reduce the volume by grouping similar subjects together. Ensure subjects are clearly identified to relevant organisation's.”

“To **limit amount of email** that they send out, only those that are actually important and action is needed, so some of the emails are just asking for support on some committee or other.”

“Better email communication, **better and more targeted email** communications.”

[I want] “**more email traffic** to keep me up to date.”

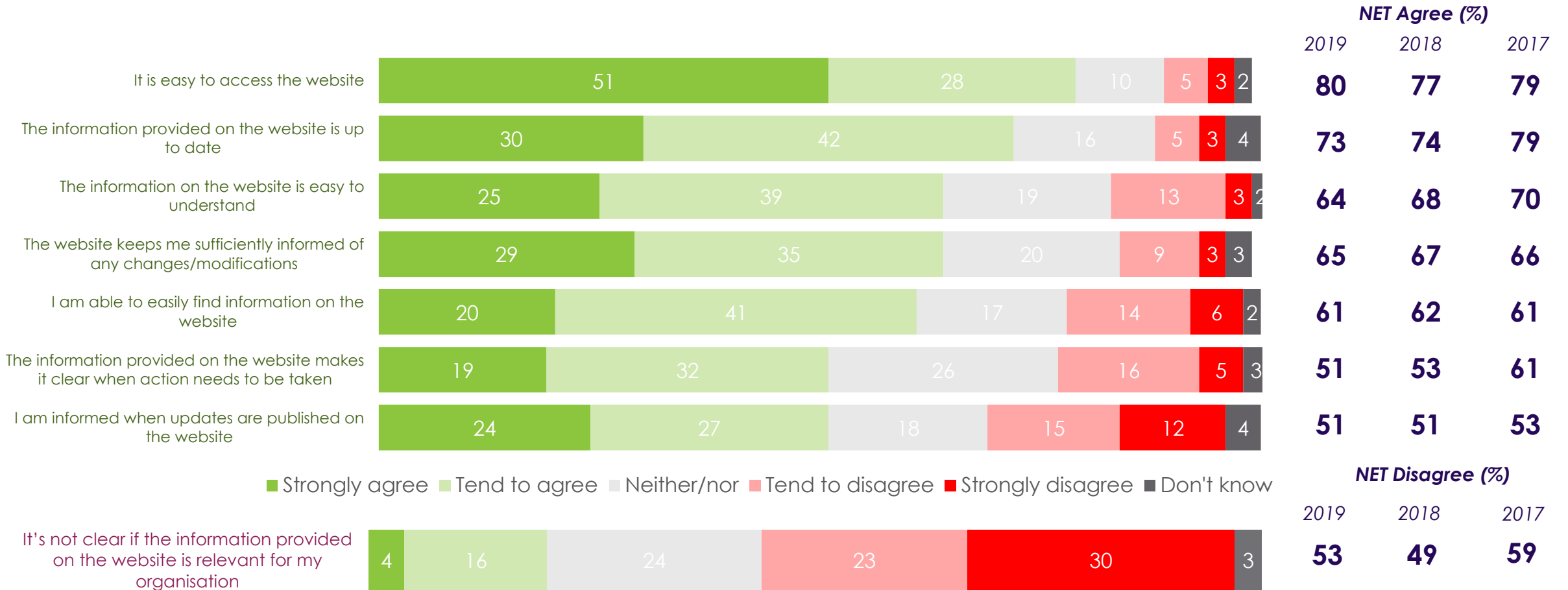
“**How can you follow the process if you are not included** in the email and don't have the same access to requirements.”

“Weekly **emails only** unless urgent.”

“Monthly email **newsletters** [would be beneficial]”

# WEBSITES

PERCEPTIONS OF WEBSITES CONTINUE TO BE VARIED. BEING INFORMED WHEN UPDATES ARE PUBLISHED AND CLARITY WHEN ACTION NEEDS TO BE TAKEN REQUIRE THE MOST IMPROVEMENT



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 (269)

# PROS AND CONS



- Websites are perceived as essential for keeping up to date with changes and modifications as well as finding information about meetings and schedules
- Information included on websites can be insightful, providing businesses with the depth of understanding they require to navigate codes
- Lay out and navigation are generally perceived positively, but there is scope for further improvement



- Customers are increasingly reliant on websites, and therefore calling for improvements that will make their experience better
- There are some reports of out of date information or instances where customers are having to inform Code Administrators that information is out of date
- Organisations expect website navigation to be intuitive; this therefore requires clearer signposting and easy to use search functionality

“I rely a lot on websites, as I am not tracking everything in real time. It is good when I want to look at **the history of a modification**. Also when I want to check when the next meeting date is, I have this on the website, I **don't need to look at an email**.”

“Documents section is really good, **clearly laid out and the information is easy to navigate** – it has been arranged as you would expect.”

“I look at the website a couple of times a week. The **search function for modification is good**. I find it quick to get to where I want to go. The calendar function is really good as well. I can easily identify when the next meetings are and add those to my own calendar easily.”

“When it comes to navigating consultations or live modifications you have to search by the 'code' of the review. Unless you know the number, it's a nightmare trying to find it. **It's not arranged by topic or theme/title of review**. You would have to be heavily engaged to know the code – which makes it harder for newer/less engaged business to engage with the code.”

“It can be **tricky because of the terminology**. They use acronyms, so if you are not used to using this website you can find it **quite difficult to navigate** through it. They could do with more plain English.”

“What's not working: change tracker is not up to date, **search functionality doesn't bring up the specific changes you are looking for**, so you have to click through everything.”

# MEETINGS

PERCEPTIONS OF MEETINGS REMAIN LARGELY UNCHANGED. HOWEVER 'IMPARTIALITY OF MEETING CHAIR' HAS SEEN A DECLINE



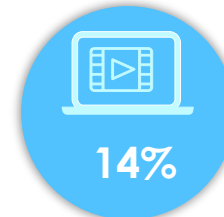
37% 2018  
43% 2017



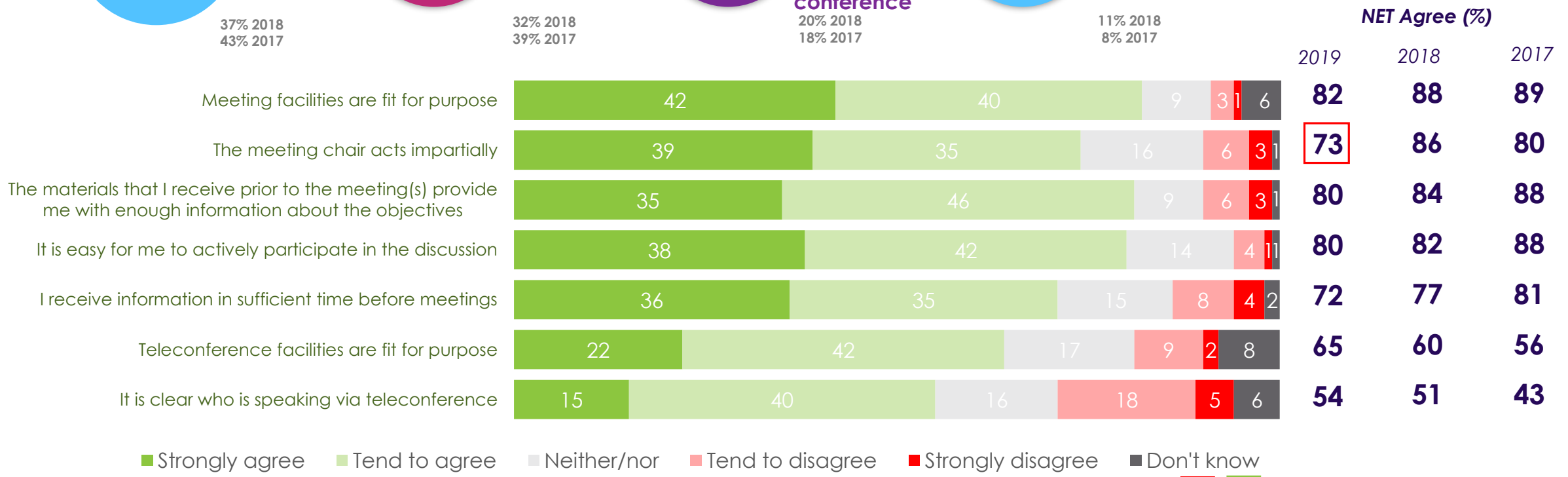
32% 2018  
39% 2017



20% 2018  
18% 2017



11% 2018  
8% 2017



■ 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 (376)

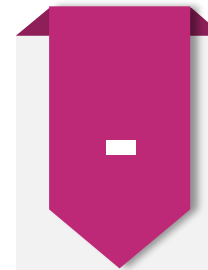
□ □ Significantly lower/higher vs. 2018

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 (158)

# PROS AND CONS



- Generally, meetings are perceived as being fit for purpose and the code chairs are generally considered impartial and effective (*although this has declined in 2019*)
- Most organisations feel that when they do attend meetings, it is easy to contribute
- Those attending meetings feel well informed prior to the meeting



- Meetings don't always take advantage of the latest technology. Teleconference facilities still require improvement with audibility issues a key cause for dissatisfaction
- It is felt that more meetings via webinar would encourage greater engagement. There is still the perception that it is difficult for companies with limited resource to attend meetings when location is an issue

“They **do a good job of the timetables for meetings**, their regularity, and the management side of different workgroups. They are able to manage a broad spectrum of topics really well in meetings.”

“They could be better at **publishing the materials before the meetings** so you get up to speed before attending.”

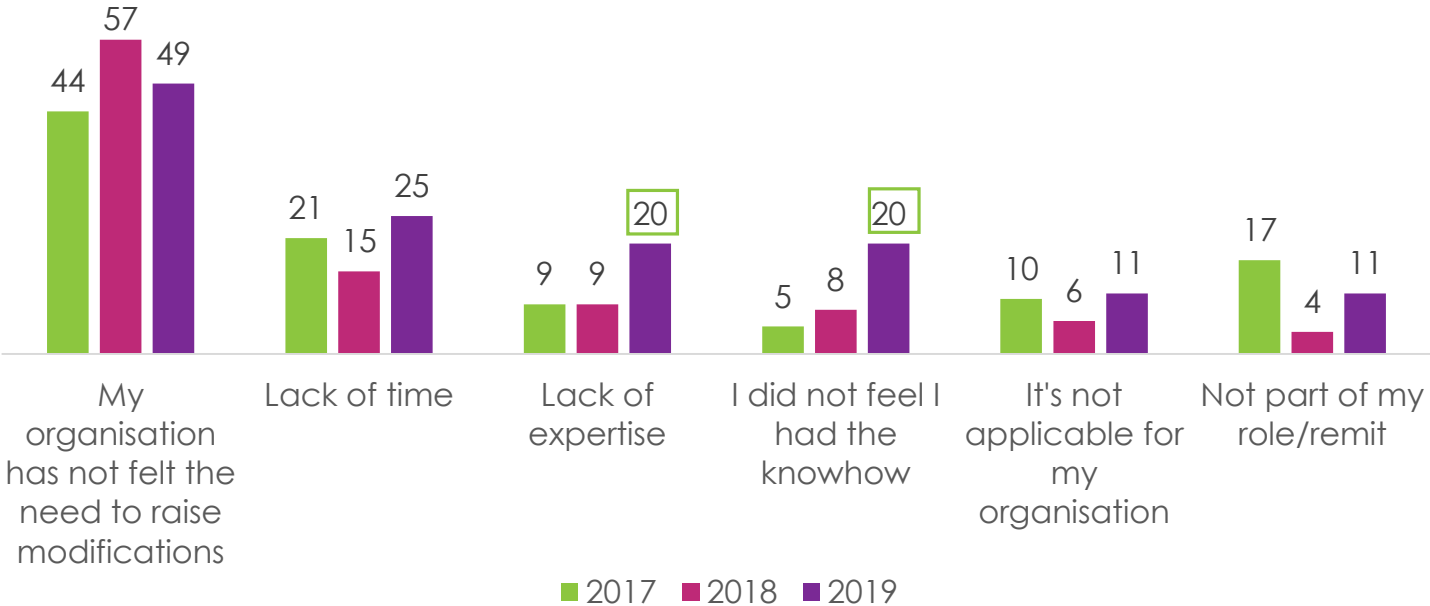
“The purpose of the **meetings should be to facilitate discussions and create solutions** rather than going on and on about administration.”



# RAISING MODIFICATIONS

TWO-THIRDS (66%) HAVE NOT RAISED A MODIFICATION FOR ANY CODE THEY INTERACT WITH. THE MAIN REASONS FOR NOT RAISING MODIFICATIONS INCLUDE;

Reasons for not raising modifications (%)



Other reasons for not raising modifications:



"We are new supplier and not felt the need so far."

"Others in my organisation have raised mods."

"Too complex."

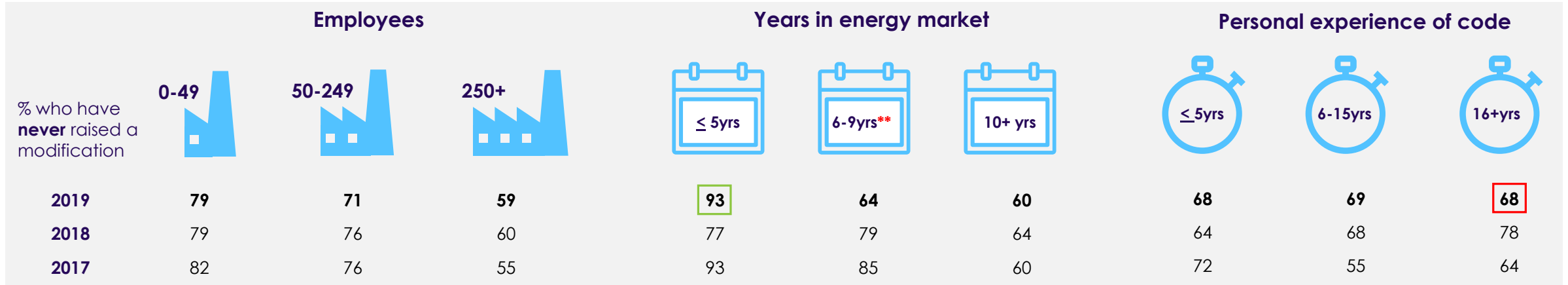
Q23/23b & Q26. Have you been responsible for raising any modifications in respect of the <code> within the last 12 months? And have you raised any modifications for the other codes you interact with? Base: All respondents (2019 - 203, 2018 - 216, 2017 - 204)

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

Significantly lower/higher vs. 2018

# RAISING MODIFICATIONS

THERE ARE SOME CHANGES IN THE PROFILE OF ORGANISATIONS NEVER RAISING MODIFICATIONS



- After the uplift we saw in 2018, fewer businesses who have been in the market for five years or less are raising modifications. However the rates have returned to levels reported in 2017
- Those with the most personal experience (16+ years) of working with codes are raising more modifications compared to the previous year

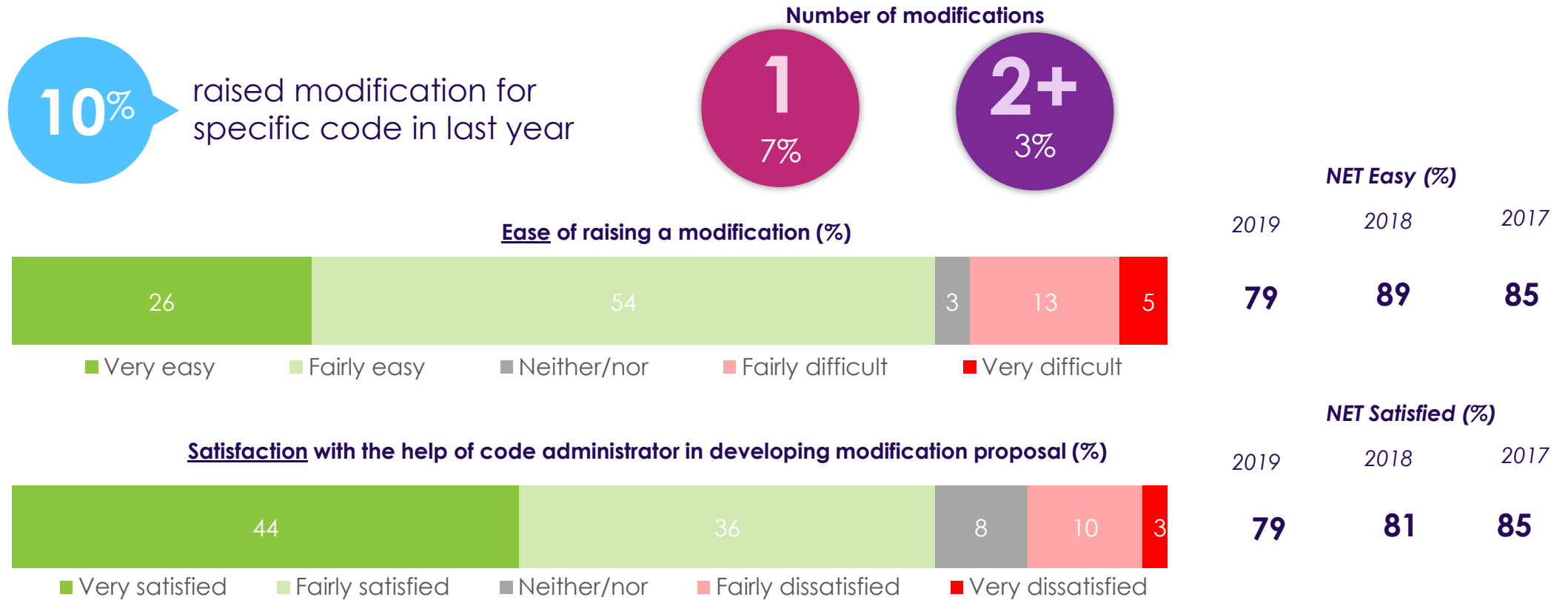
Q23/23b & Q26. Have you been responsible for raising any modifications in respect of the <code> within the last 12 months? And have you raised any modifications for the other codes you interact with? Base: All respondents (2017 – 204, 2018 – 216, 2019 - 203)

    Significantly lower/higher vs. 2018

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

# PERCEPTION OF MODIFICATIONS PROCESS

RAISING A MODIFICATION IS GENERALLY CONSIDERED EASY BY THOSE WHO HAVE GONE THROUGH THE PROCESS. HOWEVER, THERE IS A NOTABLE MINORITY WHO FEEL IT IS DIFFICULT



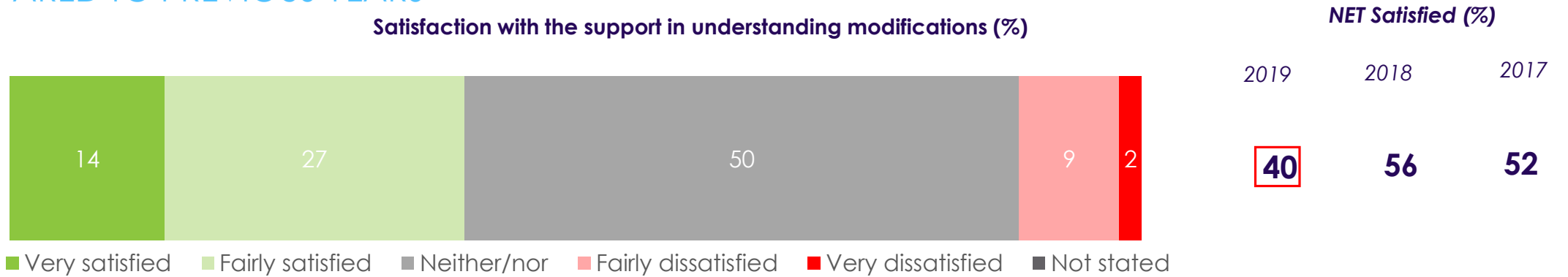
Q23/Q23b. Have you been responsible for raising any modifications in respect of the code within the last 12 months? Base: All responses for those involved with the code (376)

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 (39)

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 (39)

# UNDERSTANDING MODIFICATIONS

SATISFACTION WITH THE SUPPORT PROVIDED AROUND UNDERSTANDING MODIFICATIONS IS LOWER COMPARED TO PREVIOUS YEARS



## By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC**	UNC
Net satisfied	%	46	46	56	44	32	40	44	22	35	38	37
Net dissatisfied	%	8	14	6	14	30	3	8	8	0	6	11

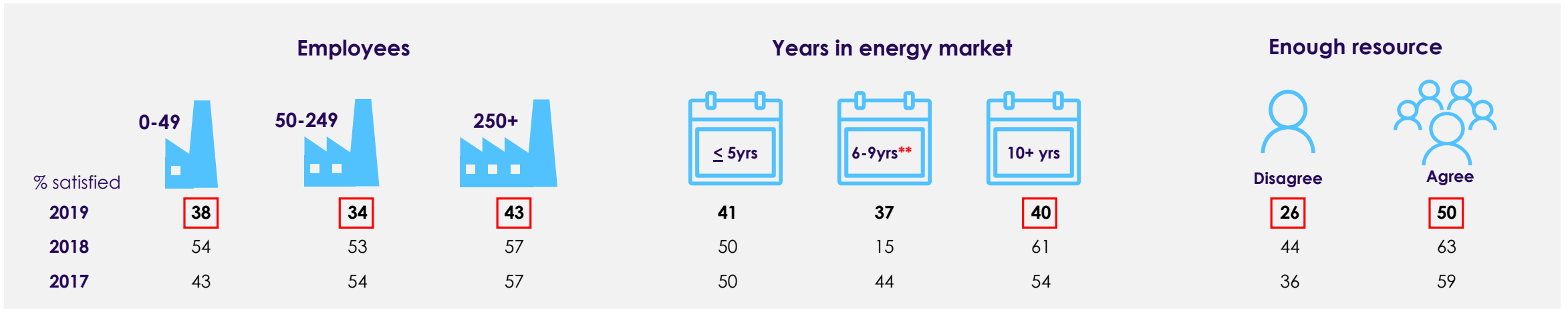
    Significantly lower/higher vs. 2018

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 (376)

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

# UNDERSTANDING MODIFICATIONS

## UNDERSTANDING OF MODIFICATIONS IS DOWN AMONG MOST GROUPS



- Organisations lacking the resource to deal with codes report the lowest levels of satisfaction with the support they receive to help them understand modifications – satisfaction has nearly halved
- The more experienced organisations, who have typically reported higher levels of satisfaction, are less satisfied in 2019 with the support they receive

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 (376)

    Significantly lower/higher vs. 2018

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



# UNDERSTANDING MODIFICATIONS PROCESS

There is a general perception that modifications are difficult to understand. This is likely driven by the fact that only a handful of organisations have gone through the process

The lack of understanding is partly driven by the perceived complexity of the modification process as well as information from the Code Administrators being seen as difficult to understand in places

Changes to codes often have wider implications for organisations, therefore there is a need for clarity on impact and actions required as a result

“There are a lot of changes and it is **not always clear what the implications are**...They are almost assuming that people will understand”

“The modification process is **like watching paint dry** and it isn't easy to follow.”

“The **change process is slow**: at the moment it takes 6 months to make a change sometimes. I think it should take 2-3 months max.”

“Publishing of information on modifications is most important to me. It's important that they **maintain really good records of all documentations involved, but they are not as good as they should be.**”

“The modification **process can be a bit arduous**. I think they could **simplify the language** and make it easy to read by writing in bullet points and shortening their emails.”

“If OFGEM could provide **guidance as to what they think is acceptable / not acceptable** as early as possible in the process, it would be helpful, lots of efforts could be avoided. Because OFGEM makes the final decision.”

“Issues could have been avoided if they had set this up as a proper joint working group [related to cross code mod]. **There is definitely a need to do a lessons learnt** and see what we can learn from the way the process worked.”

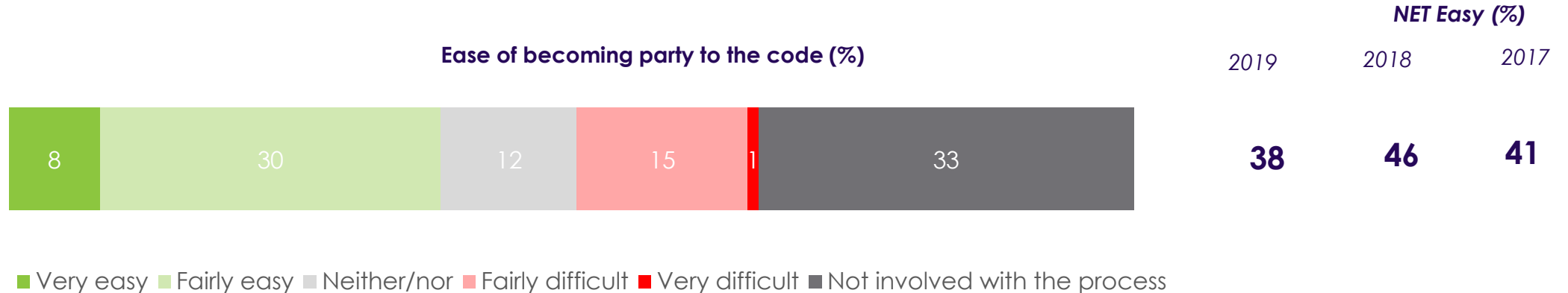
# ACCESSION PROCESS

## SATISFACTION WITH EASE OF THE ACCESSION PROCESS HAS DECLINED

26%

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

“The **accession process is straightforward**, all the support is already embedded in the documents, we don't have the key contacts so we don't receive a lot of support. Sometimes I had to find key people myself.”



Significantly lower/higher vs. 2018

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 (281)  
 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 (73)

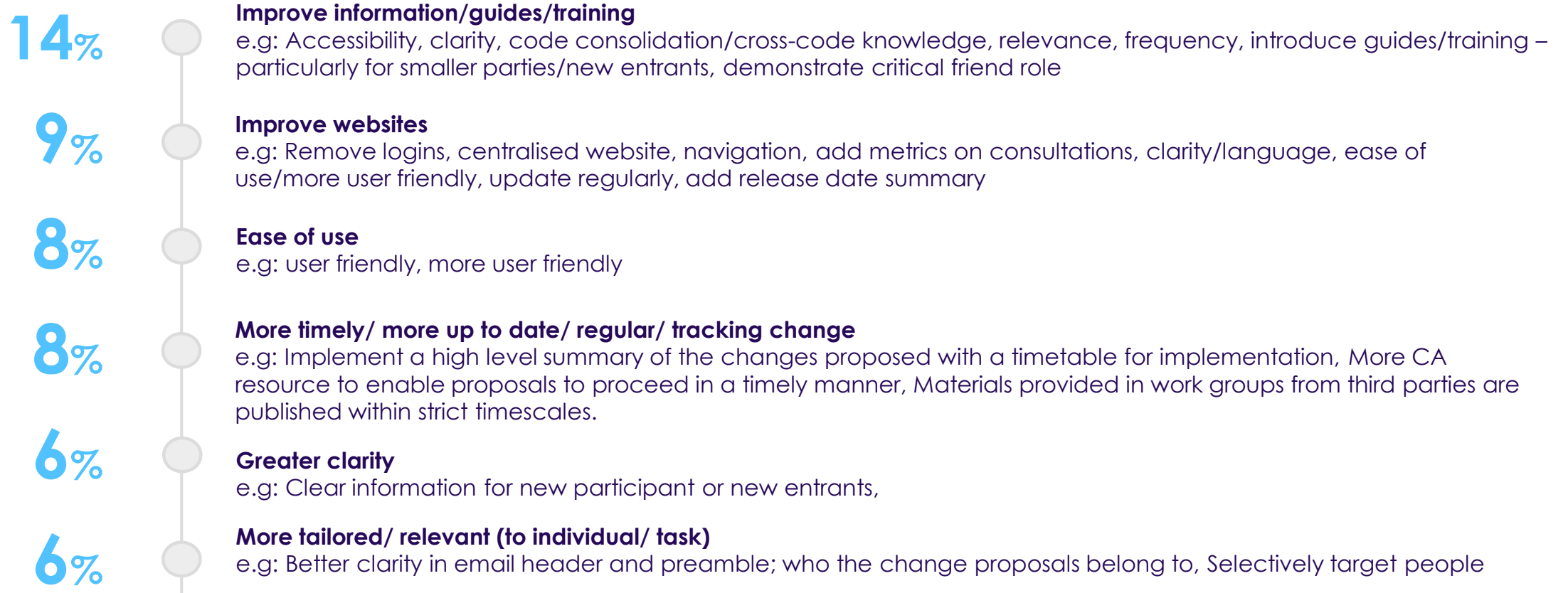




# CONCLUSIONS AND RECOMMENDATIONS

# SUGGESTED IMPROVEMENTS

WHEN ASKED TO SUGGEST ONE SPECIFIC IMPROVEMENT TO THE SERVICE PROVIDED, 61% OF ORGANISATIONS COULD IDENTIFY AN AREA FOR DEVELOPMENT



Q29. If you could make one improvement to the service provided by the code administrator in relation to the <code/codes> what would it be? Base: All responses for those involved with the code (397)

Only improvements mentioned by 5% or more organisations are shown



# SUGGESTED IMPROVEMENTS

## Website

“More **timely updates to the website**, sometimes there are modifications that aren't listed on the change tracker on the website which makes it difficult to progress internally as we need time to understand the change.”

“The website, making it **easier to find things**. Making it **clearer which changes and modifications are applicable** to which parties.”

“Their website does not keep up. It is **not a true reflection of what is going on**.”

## Engagement and support

“**More engagement**. More training days and be more proactive and share knowledge within the industry.”

“**Maintain the level of service** they have been very helpful for me, support very invaluable.”

## Information

“Explain the issues in **plain English**, the English is technical.”

“Use of **executive summaries** to aid readers short of time.”

“**Clearer information** in documentation.”

“The **information** could be **shown on website more clearly** so it can be more user friendly and informative.”

## Expertise

“Having **experts** within the Code Administrator **that can explain implications for the changes** would be useful. They are the most difficult industry codes because of the subject matter.”

“They need to look at their **expertise on helpdesk**, ensure they have the **right level of support for parties**, and also with the changes for central registration ensure all parties are kept informed.”

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

2019 has seen some notable declines across the board

It is critical to improve performance around provision of information. Satisfaction has fallen at a time it has become even more critical to the customer experience

Performance around email communications, website information provision and meetings remains broadly aligned to 2018. Customers however still highlight aspects that are in need of improvement particularly for websites

The modification process remains a challenge; we see a decline in reported satisfaction with the support CAs provide to enable organisations to understand what modifications mean for them

There is a call for greater alignment in the way CAs deliver their service. General perception that this change can be driven by a more formalised CACop

# RECOMMENDATIONS



Communicate scope of service to customers; thus eliminating ambiguity on expectations



Find aspects of service delivery that can be consistently delivered across all Codes:  
i.e. Broad topics (Changes, What it means for you, who should take action)



Provide summary round up of key Code related comms in a weekly news letter. Potential to do this at a code level as well as across codes



Review cross code working and how CACoP is currently working. There is a strong appetite for a singular CACoP voice

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All work is carried out in accordance with quality standard ISO20252

# SAMPLE PROFILE

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

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