Code administrators survey

Report

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Executive summary

Executive summary

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

02 Satisfaction is generally high, and overall satisfaction remains unchanged from 2017. In regards to key aspects of code administrator services, there have been significant positive changes, particularly in the areas of support and interpreting information

03 There are indications that smaller organisations are feeling more confident, supported and knowledgeable about dealing with the codes than in 2017, but they are often still behind larger organisations

04 The relevance of information received and certain elements of email and website communications require further attention

05 The key influencers on satisfaction continue to be perceptions of the provision of support generally, support in relation to modifications and ease of interpreting information

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 first study was conducted in 2017 and 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 (CA), or whether they offer value for money.

In 2018, the study has been repeated to monitor performance and identify any developments. Specifically, the survey has been developed to:

Identify   **1**

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

5 in-depth interviews

Fieldwork date:
14th – 20th Feb 2018

Core survey to measure experience and performance of CAs

216 surveys in total

137 telephone participants
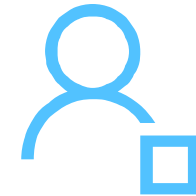
76 online participants

Fieldwork date:
27th Mar – 11th May 2018

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

25 follow-up in-depth interviews

Fieldwork date:
18 May – 20 June 2018

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 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.

- 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

- A total of 216 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 397 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
44	40	35	36	35	34	42	36	37	*19	39

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 2017 and 2018, 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 **<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

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+
38	34	133

Years in energy market

≤ 5yrs	6-9yrs	10+ yrs
35	14	165
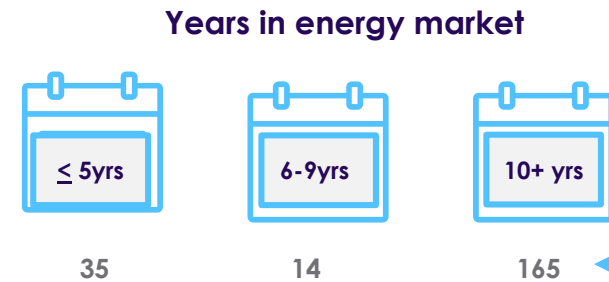
These base sizes increase to robust levels on KPIs as these are analysed on all responses (some respondents answered for more than one code)

- 53% of companies with 0-49 employees (and 47% of those with 0-9 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'

Industry context
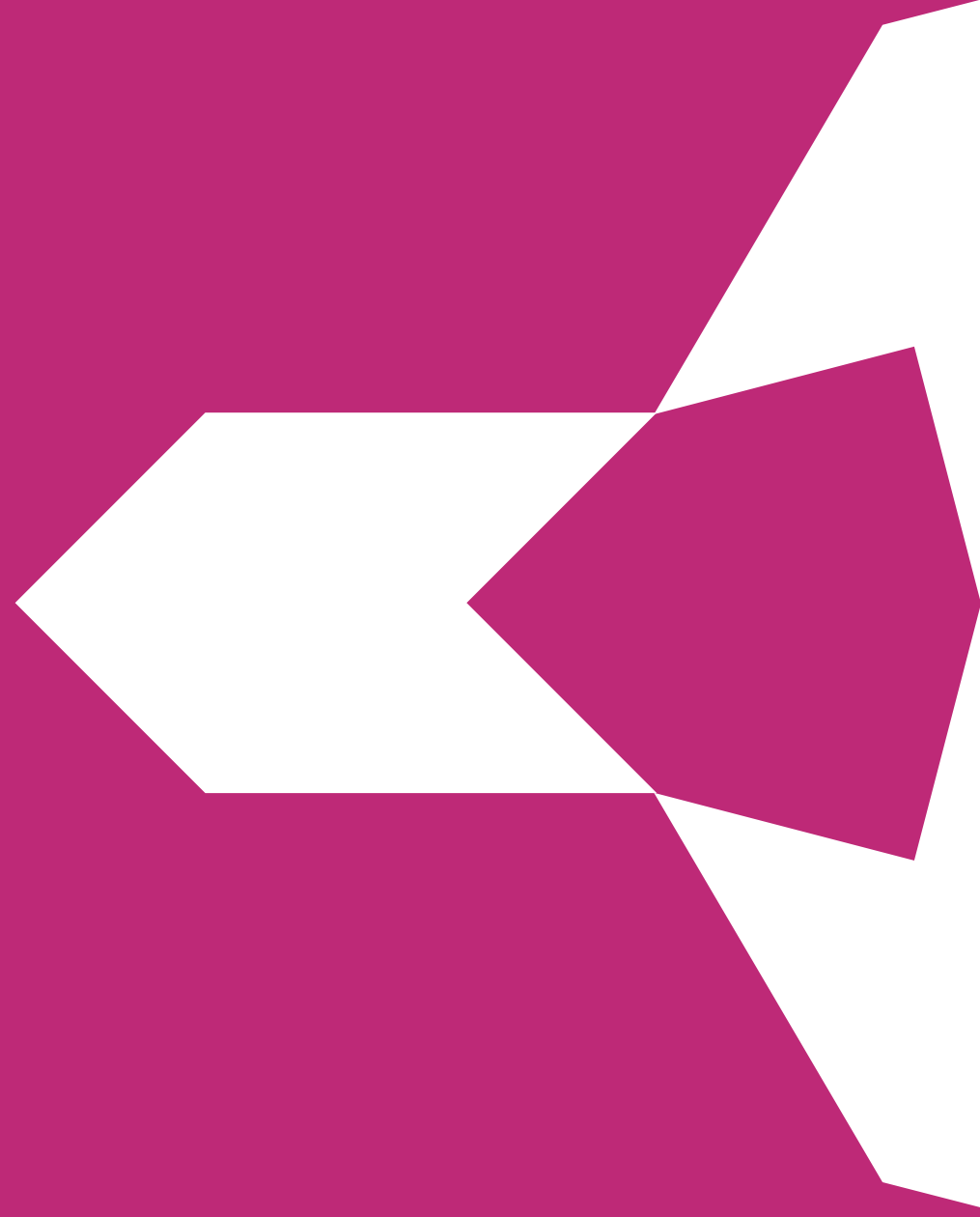
Codes are complex and their governance is stringent

Organisations still acknowledge that codes are inherently difficult to navigate with some more technical than others

While the environment is challenging:

- Organisations do expect the governance of codes to be stringent. Although they want processes to be easy, they also feel that organisations should have the technical competence to be able to deal with codes
  - They believe that this is essential as it protects business, and smaller organisations in particular

- There is recognition that complexities associated with an individual code impact the way each code administrator operates

"

"You have a professional Administrator doing a job but there is a much bigger issue here. Is the regulator paying attention."

There are some broad and cross cutting issues identified

- National issues like Brexit are perceived as having a negative impact on both industry and codes
  - Indications that some businesses are holding off on investment until they have greater clarity on what is happening in Europe
- View that there is a resourcing gap for some codes (ie. Grid Code)
  - A high level of Code Administrators' personnel with engineering backgrounds who are not always able to easily articulate changes in layman's terms
  - Some believe that Ofgem also faces challenges with resourcing as their personnel do not always have adequate expert knowledge levels to challenge and influence discussions in relation to specific codes
- Sensitivities remain regarding **National Grid;** CAs viewed as having greater independence tend to be perceived more positively:
  - Other CAs are perceived as more engaged and proactive in comparison
  - National Grid is viewed as having been appointed by Ofgem and therefore offers the bare minimum in support and administration as there is no incentive to meet a good standard of service
  - Perception that there can be a conflict of interest over National Grid's dual role

The recent incentive introduced for National Grid by Ofgem is not yet fully registering with organisations

"Cross over in role of National Grid not helpful, it may be better if it was more independent."

"I wonder whether NG is engaging with people from across the sector … They stick to the status quo and are unchangeable."

- Perception that Ofgem could play a much bigger role in providing guidance and protection for business; this is driven by a view that the market does not always lend itself to a level playing field:
  - Concerns around some businesses submitting tactical modifications for their own commercial gain
  - View that smaller organisation more likely to be impacted as they have limited resource for personnel to attend meetings and to raise such modifications

Recommendations put forward in 2017 are beginning to take root

- There is acknowledgement that code administrators are implementing positive changes with specific changes around:
  - Website information
  - Usability of teleconference facilities
  - Code chairs being more engaged at meetings

- However, there is still some way to go, and there are specific examples of changes that have not been beneficial to organisations
  - When National Grid updated their website they removed relevant historical information
  - Some code administrators are still not updating their websites regularly enough
  - Scheduling of meetings can be hit and miss, with reports of limited notice, not allowing sufficient time for meetings and clashes with other meetings. This can limit businesses consultation opportunities

"

"Change is good but not always for the best."

"

"Good idea to change website but they got rid of old information. People have important feedback but this was not taken on board."

- Cross-code working may be starting to happen but still very slow and not cohesive
  - Central log of modifications not always being kept up to date.

"

"It is happening but I don't think it is happening effectively. By default they are different..."

There is a belief that CA's are on track to fulfil CACOP requirements

Delivering well in most areas, they are perceived as a critical friend

- They are seen as professional and respectful

- They generally want to help organisations, particularly small businesses and those who are new to market

- Reports of bringing in external subject experts around areas like governance (examples include BSC and CUSC)

There are however some specific areas to watch out for:

- Code administrators could be more forward looking and proactive

- Although they are providing the right information, this can at times be messy

A call for more stringent processes around modifications:

- Preliminary impact assessment to identify risk

- Identify who is going to be most impacted

- Decide who should be involved in the modification discussions

"When discussions are of a technical nature, the chair has taken it aside and brought in experts."

"Documents are messy and not always clear. They have been written over a number of years. Reviewing the documents is beyond them, there is so much."

Key findings

Organisation profiling

Expertise and resource

The level of expertise organisations have to deal with codes remains consistent with 2017. It is encouraging that there is a directional improvement around availability of resource

NET Agree (%)

2018 *2017*

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

49	37	7	6	1

86 **85**

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

32	38	9	15	4	1

70 **64**

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

	Employees			**Years in energy market**		
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs****	**10+ yrs**
% Agreeing Expertise	68	85	89	69	86	89
Resource	55	79	71	57	64	73

*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 (216)
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 (216)

Expertise and resource

The means to deal with the codes and their requirements is linked to the size and experience of the company. However, compared to 2017, smaller businesses are reporting greater confidence in their ability to deal with codes

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

Resource

Resourcing is more of a challenge for organisations; one in five indicate they do not have enough resource to sufficiently deal with codes. There is however an improvement in this area particularly so for small and medium sized companies

Organisations acknowledge that code administrators cannot solve all of their problems – code administrators are perceived as a critical friend and generally available to offer business support when it is needed

"I spend as little time as possible dealing with the codes although it is my role within the business. There is no other resource to deal with it."

"More resource to allow more frequent workgroup meeting."

"More user friendly/helpful to new entrants without resource dedicated to specific areas - we tend to wear many hats!"

Knowledge of code administrator responsibilities

There is a marked improvement in reported knowledge of areas the code administrators are responsible for. 2018, sees some notable shifts, with both smaller organisations and those in the energy market for five years or less indicating greater awareness levels
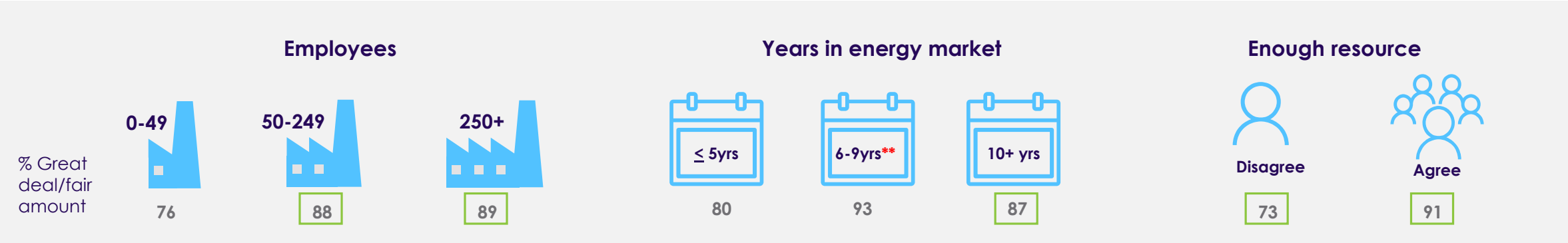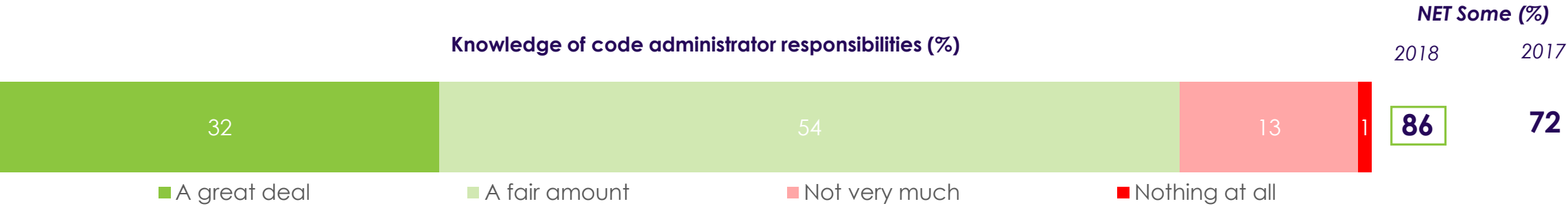
NET Some (%)

Knowledge of code administrator responsibilities (%)

2018　　*2017*

A great deal	A fair amount	Not very much	Nothing at all
32	54	13	1

86　　**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　76
50-249　88
250+　89

≤ 5yrs　80
6-9yrs**　93
10+ yrs　87

Disagree　73
Agree　91

*small base size - interpret with caution

Significantly lower/higher vs. 2017

Personal interaction with code

On average, individuals have been interacting with codes for around 6 years

67% — I get involved when there are specific issues relating to my area of work

20% — I have strategic overview of the code

34% — I am responsible for managing my organisation's involvement with the code

0% — I am part of team/ have shared responsibility

90%

63%

55%

3%
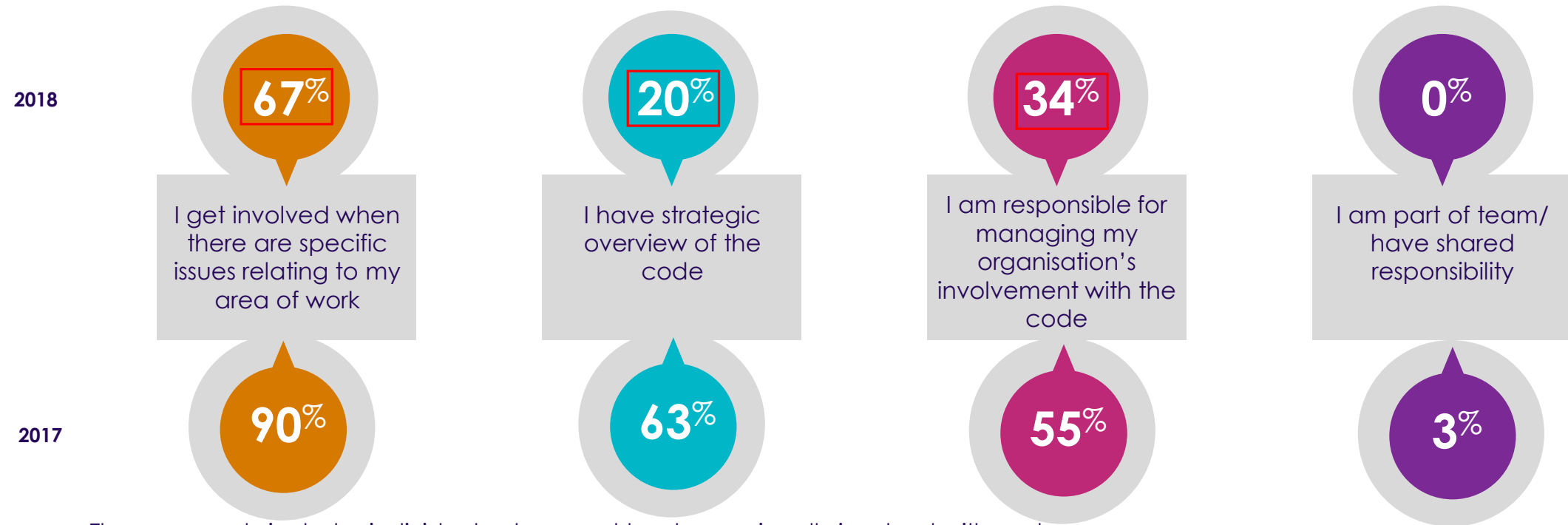
- The survey only includes individuals who are at least occasionally involved with codes

- Individuals tend to have multiple responsibilities in the way they interact with codes

- In 2017, 63% indicated that they had a strategic overview of the code. 2018 sees a marked decline in those indicating this (20%). This may potentially be due to organisations understanding their input better. A lower proportion reporting strategic input feels instinctively right and chimes with the broader business world

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 (397)

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 (397)

Significantly lower/higher vs. 2017

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

"

"Not everyone the CA interacts with is an everyday practitioner or expert in this. It is what we have to do as part of our job but it is not all or even a great part of our job."

"

"There is generally over-representation of the Big 6 at the expense of smaller organisations. Within the Big 6 people can spend all day everyday attending to the code with sometimes more than one person being responsible while smaller organisations do not have this luxury."

KPIs

Perceived improvements

The service delivered by code administrators is perceived as having improved in places. Only 5% indicate a decline in service

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

5	12	57	4	1	20

NET Improved (%)

2018   *2017*

18   **Not asked**

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

By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net improved	%	11	10	17	28	20	12	7	28	32	21	13
Net worsened	%	5	3	3	8	6	3	7	3	3	11	10

*small base size
**very small base size

interpret with caution

Q29b. Thinking about the service that you have received in relation to the <code> in the last year, would you say it has improved, remined the same or got worse?
Base: All responses (397)

Overall satisfaction

Overall satisfaction with aspects of service delivered by code administrators remains high. No single organisation earns a high dissatisfaction score

Overall satisfaction (%)

NET Satisfied (%)

		2018	*2017*
22	48	25	5	**70**	**70**

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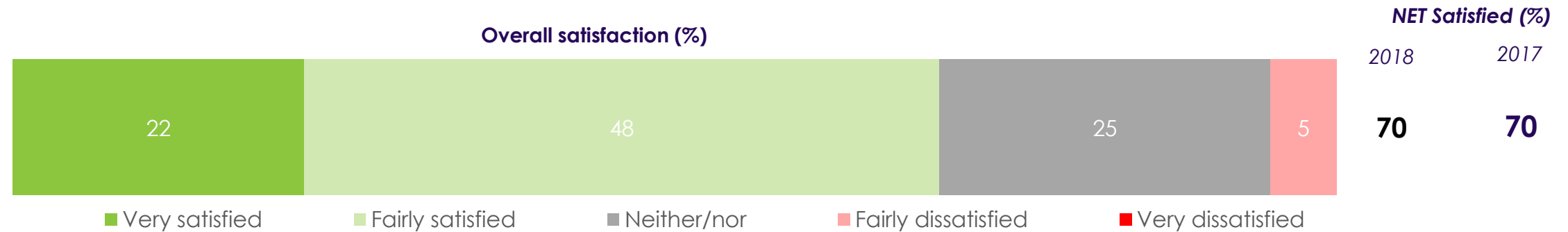
By code

	%	BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net satisfied	%	86	65	74	58	66	62	76	61	78	58	69
Net dissatisfied	%	5	8	3	3	6	6	2	8	0	11	8

*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 (397)

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								
2018	65	79	67	74	54	70	64	84
2017	62	73	73	56	78	72	62	85
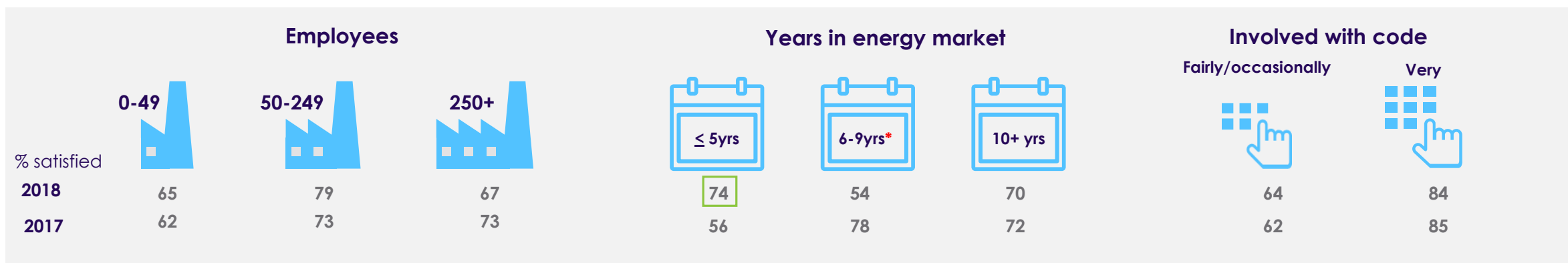
Availability of resource and familiarity with codes strongly influence overall satisfaction:

- There is a shift from 2017, organisations that are newer to the energy market are significantly more likely to be satisfied (74% vs. 56% in 2017)

- Conversely, organisations that have been in the market for 6-9 years are less satisfied (54% vs 78% in 2017)

- Perceptions among larger organisations remain unchanged, with seven in 10 being satisfied with the level of service

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

Significantly lower/higher vs. 2017

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

The complexity of the industry however means that CAs are not always able to provide businesses with the support that they feel they require

There are some concerns that CAs do not always have the correct level of expertise. This can be exacerbated by the perceived high staff turnover

The modification process remains a priority area for businesses, with many calling for simpler language to be used in comms. This is likely to have a positive impact on the customer experience

"On the one hand the accession should be as easy as possible but on the other hand it should also protect the interest of those parties who are already part of the code so you don't want a new entry to accede the code too quickly and then create issues of data flows that are incorrect or perhaps credit cover positions that aren't covered so I think that's not an easy thing to do to exceed. In my experience the code administrators are very helpful, even extremely helpful in supporting parties to do that and it is important that it is done properly."

"They're not awful but they're not perfect either" hence neutral satisfaction rating in the survey."

"Ideal CA would support and have dedicated focus on the task, have people solely working on this, and it would be a senior team with relevant knowledge."

"A great deal of modification is written in jargon. It needs to be more in Layman's terms."

Key driver analysis

Three service aspects have the largest impact on overall satisfaction and these are the same factors which were identified in 2017

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*	2018 rating
1	How satisfied or dissatisfied are you with the provision of support from the code administrator in your interactions with the code?	0.467	81%
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?	0.173	56%
3	Overall how easy or difficult is it for you to interpret the information from the code administrator in relation to the code?	0.125	65%

* 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 continue to be 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. Over four in five are satisfied with this aspect of service – an improvement to last year

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

2 Code administrators are not performing as well on the second most important aspect of service but again this has seen a moderate increase since 2017 – from 52% to 56% satisfaction. This service still warrants further attention to achieve an increase in satisfaction overall

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 Reassuringly, 65% of organisations now say it is easy to interpret information in relation to the code (up from 59%) but there is still room for further improvement

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 2018, we see the same themes (as in 2017) specifically mentioned as pivotal 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

"To act as a more critical friend during change of proposals."

02

Receiving information which is easily identifiable as relevant to their organisation

"Training required to know about what BSC is and how it should apply to the organisation I'm in. This would ensure that information I'm provided with could be better understood and promote interaction."

03

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

"I am generally happy with the code administrator for the MRA, however with regards to the website, the search facility could be enhanced and where results are found, display in date order."

Satisfaction with the provision of support

Code administrators are perceived to have improved the provision of support to businesses from the previous year

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

NET Satisfied (%)

					2018	2017
Overall (346)	28	53	15	4	1	**81**	**73**

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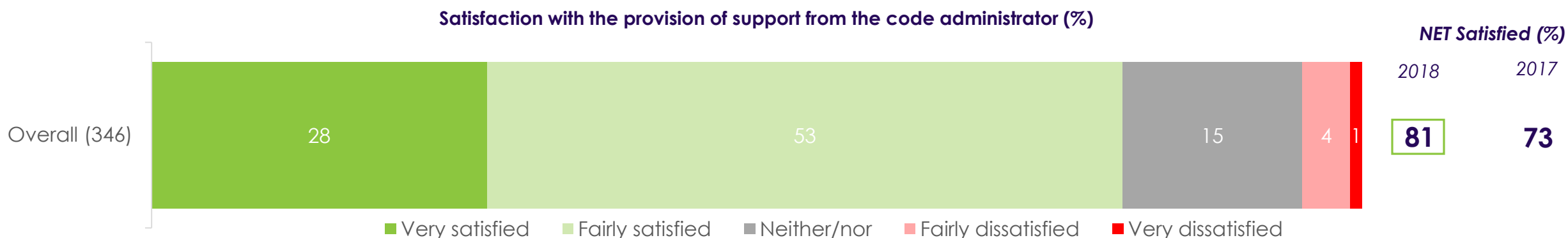
By code

	%	BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC*	MRA	SEC	SPAA	STC*	UNC
Net satisfied	%	97	71	88	71	73	75	97	77	81	65	81
Net dissatisfied	%	3	9	3	3	6	4	3	3	3	6	6

*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 aware of support (346)

☐ ☐ Significantly lower/higher vs. 2017

Satisfaction with the provision of support

It is encouraging to see that perceptions of improvement around provision of support are positive across the board

	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								
2018	74	86	81	80	63	82	79	85
2017	58	81	79	56	67	77	64	79

Satisfaction is particularly strong for:

- Smaller businesses; a significant increase from 2017 when this group tended to be less satisfied than larger organisations. It is however worth noting that although gains amongst smaller organisations are highly significant, larger organisations still report greater satisfaction overall

- Those newer to the energy market also see large gains in satisfaction

- The organisations who have been in the energy market for 6-9 years see a modest directional decline in satisfaction with the provision of support

*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 (346)

Significantly lower/higher vs. 2017

Satisfaction with the provision of support
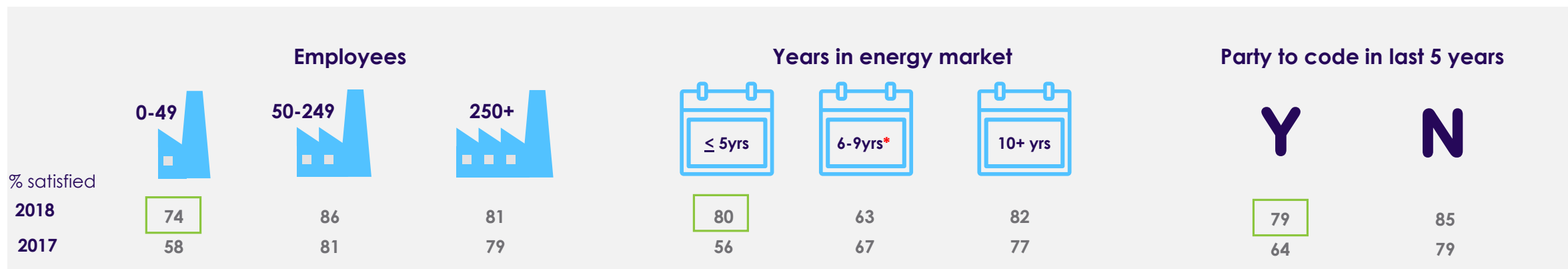
Support is a key aspect of service provision and businesses indicate a preference for tailored services

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

- It is important that support is provided in a timely manner

- While tailored services would be preferred, there is an acknowledgement that the nature of codes and the diverse customer base would not allow code administrators to effectively facilitate that

- Businesses continue to indicate that support is particularly critical when there are complex requirements or when dealing with modifications

"

"Overall interactions are really good, but some queries could use to be answered, or even acknowledged, in a shorter period of time."

"To make it more accessible for people who don't have time to think about it all the time."

"More tailored communication, less impenetrable messages."

Satisfaction with support received when requested

Similarly, satisfaction levels when organisations proactively request support are high, and significantly up from 2017

Satisfaction with support received when requested (%)

NET Satisfied (%)

2018   *2017*

| 29 | 51 | 17 | 3 | | **80** | **72** |

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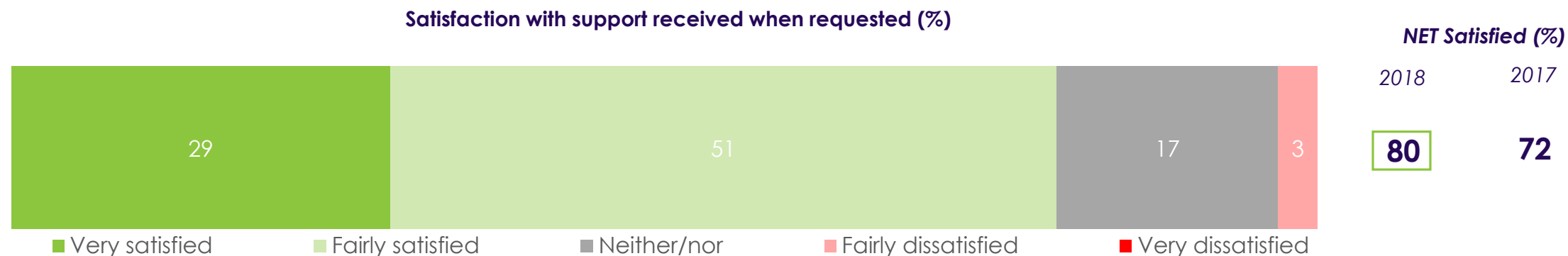
By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net satisfied	%	95	76	91	79	77	69	81	77	78	75	77
Net dissatisfied	%	5	8	3	4	0	0	0	10	0	6	0

*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 proactively seeking support (353)

☐ ☐ Significantly lower/higher vs. 2017

Satisfaction with support received when requested

Satisfaction levels have increased for most groups

	Employees			**Years in energy market**			**Enough resource**	
	0-49	50-249	250+	≤ 5yrs	6-9yrs*	10+ yrs	Disagree	Agree
% satisfied 2018	75	87	80	79	70	81	65	86
2017	67	72	75	53	79	74	64	78
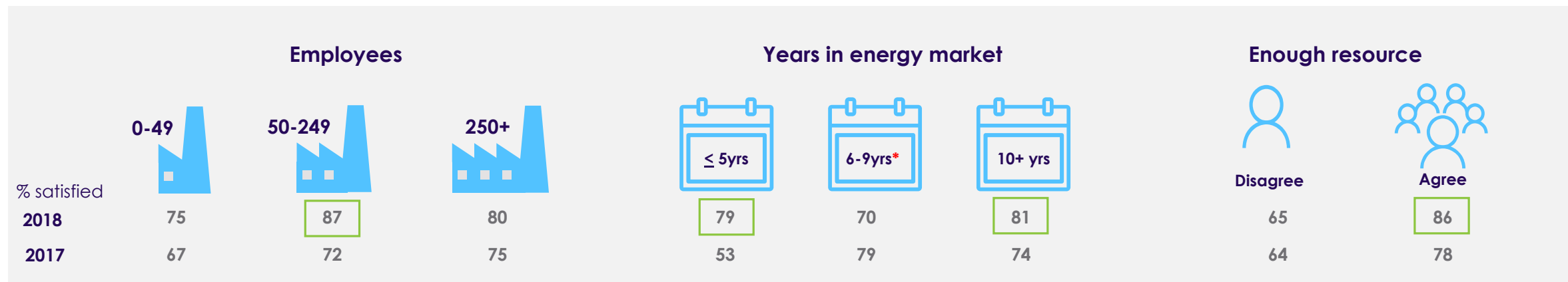
The satisfaction pattern when organisations proactively request support is consistent with support directly provided by code administrators:

- Smaller businesses report higher satisfaction levels than they did in 2017, but again, this group still has the lowest scores overall

- Those operating in the market for five years or less report significantly higher levels of satisfaction compared to 2017

- Again those in the market for 6-9 years see a decline in perceptions of satisfaction

*small base size
**very small base size

interpret with caution

Significantly lower/higher vs. 2017

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

- There is still a perception that the bigger customers have an advantage as they have much greater resource so they have the time to fully interpret information

- There is scope to share some of the outcomes that result from the cross code working parties

- Have well trained teams providing support to customers. The landscape is complex and customers want to be reassured that they are receiving the correct information and understand how to use it effectively

❝

"Aware that CAs get together on a quarterly basis, but rightly or wrongly those discussions are not made public. Assumes the CAs benefit from this cross-sector knowledge but it is not transparent and could be useful to those party to the codes."

❝

"it is paramount for a CA to support organisations with modifications raised by others. The latest modification, I attended a workshop last month and it was very well explained, a clarifying workshop and it was very well run"

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)

38

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

- In line with 2017, most (80%) customers feel the code administrator keeps them well informed about the code, 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 is a drop in the proactive use of website to seek information. This is an area to watch as there is a perception that websites are not always kept up to date and relevant information is not always available

- In 2017, customers raised concerns around their ability to easily interpret information received, this area has improved slightly but is still important to watch. This aspect of service continues to influence overall satisfaction with the service provided by code administrators

- 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

In line with 2017, 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 (%)

28	52			9	3	9

2018 **80** *2017* **79**

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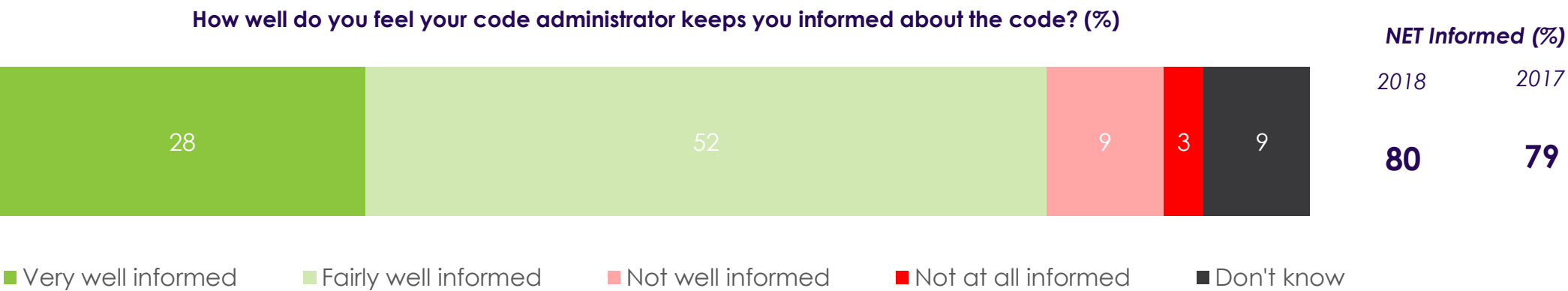
By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net informed	%	86	75	86	72	80	65	76	78	86	79	92
Net not informed	%	7	18	9	11	14	18	14	11	5	21	3

*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 (397)

41

Kept informed about the code

Although satisfaction with being kept informed is high, there are some downward shifts for some groups

	Employees			Years in energy market			Enough resource	
	0-49	50-249	250+	≤ 5yrs	6-9yrs*	10+ yrs	Disagree	Agree
% informed								
2018	68	82	81	69	62	84	62	86
2017	71	87	81	64	75	82	67	86
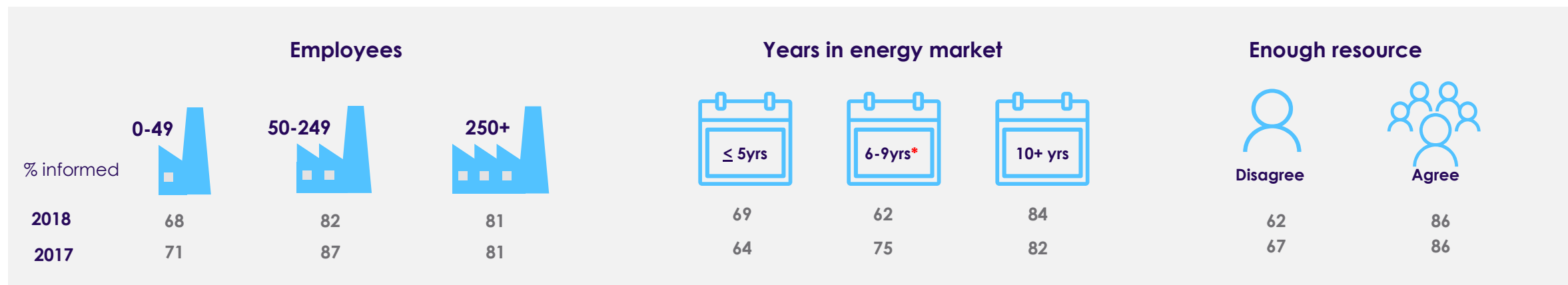
- A very small directional decline in perception of being kept informed among the smaller and medium sized organisations

- Again we see a decline in satisfaction among those who have been in the energy market for 6-9 years

- Organisations indicating they have limited resource report lower satisfaction levels

*small base size
**very small base size

interpret with caution

Kept informed about the code

Although customers agree that they are kept informed, there are some concerns around CA resourcing and the view that some CA teams are stretched. As we saw last year, there is still a view that those who are less familiar with the codes struggle to interpret the information received. So while the obligation to provide information is being met, there is a need to continue to simplify and to target communications

"Get more staff to support the administration process. The level of industry change plus obligations to implement European codes means that the current team is under-resourced)."

"The level of information in communications is directed at people who routinely (full time?) manage these kind of issues. I represent a petrochemical company with an embedded CHP, that is by necessity connected to the grid; however, the export of electricity is not our core function.

"Putting all the information relating to a change with the change on the change proposals page. Currently you have to look at the documents for change board meetings to get all the documents relevant for a particular change which is fine for those in the know but difficult for those who want to find out about a change proposal and who have are not closely engaged with the change process."

"To target the specific audience/industry effected"

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)

43

Receiving information

Channels used by CAs to deliver support are broadly in line with the methods of seeking support used by organisations. 2018 sees some changes to the way support is consumed; meetings and workshops, reading documents and individual contact are all significantly down from 2017

Code administrator proactive support channels

Email notifications	Updates on website	Meetings and workshops	Offering helpdesk	Newsletters	Through relationship manager
75%	36%	34%	19%	17%	16%
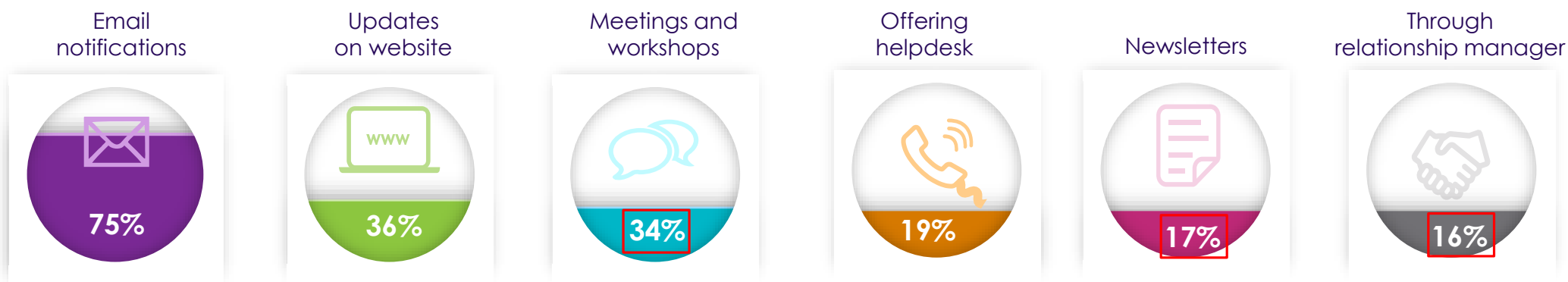
Support channels used by organisations

Email	Updates on website	Offering helpdesk	Meetings and workshops	Reading documents	Individual contacts	Through relationship manager
63%	28%	22%	20%	16%	14%	11%

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 (397)

Significantly lower/higher vs. 2017

Frequency of receiving information from code administrator

The frequency with which information is received remains unchanged from the last year; typically 1-2 times per week. Frequency is still perceived as about right

Frequency of receiving information (%)

Average:

2018   *2017*

10	5	24	27	24	10

1-2 times a week   **1-2 times a week**

- ■ 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… (%)

About right %

2018   *2017*

7	81	7	4

81   **84**

- ■ 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 (397)
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 (324)

Ease of interpreting information from the code administrator

There is an improvement in ease of interpreting information

Ease of interpreting information (%)

| 18 | 47 | 13 | 10 | 3 | 9 |

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

NET Easy (%)

2018	*2017*
65	**59**
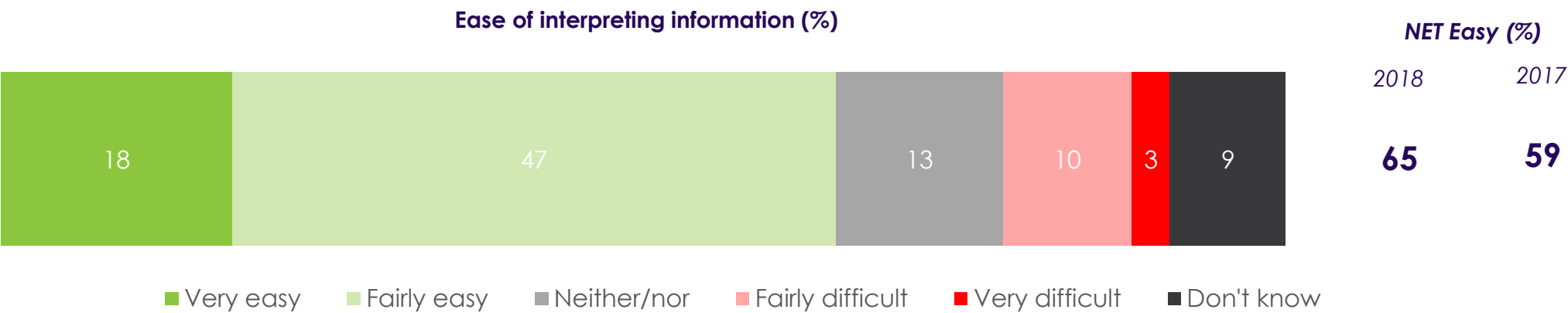
By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net easy	%	75	68	63	61	60	53	67	61	70	53	74
Net difficult	%	11	20	11	17	14	18	10	17	5	11	10

*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 (397)

Ease of interpreting information from the code administrator

Those with more personal experience of codes and in organisations with 250+ employees are more likely to find interpreting information easy. However there has been a positive uplift for those within smaller organisations and those in the energy market for 5 years of less

"We have a team internally that interface with code administrators and they have to rewrite any modifications into plain English for anyone working in Operations or Customer facing. Avoid jargon!"

"Tough to read new code – brought in consultancy to help understand the gas code we are now ascribed to ensure accuracy to obligations – past non-compliance issues hurt the company badly in years prior."

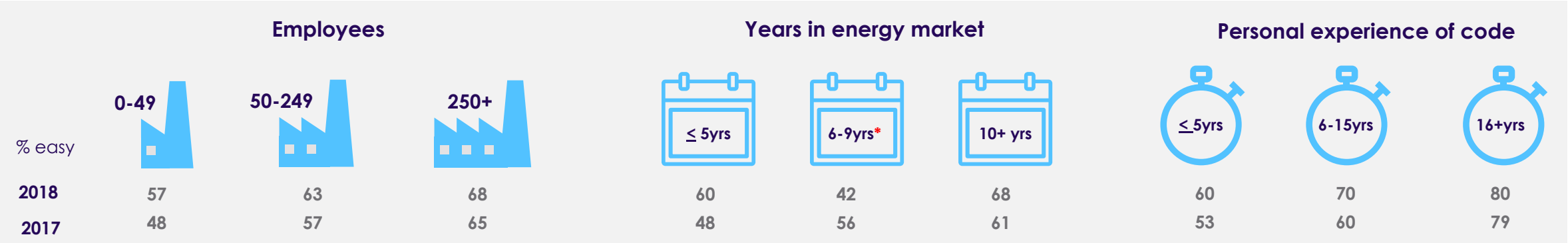|	Employees			Years in energy market			Personal experience of code		
% easy	0-49	50-249	250+	≤ 5yrs	6-9yrs*	10+ yrs	≤ 5yrs	6-15yrs	16+yrs
2018	57	63	68	60	42	68	60	70	80
2017	48	57	65	48	56	61	53	60	79

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 (397)

*small base size
**very small base size

interpret with caution

Relevance of information

Reported relevance of information remains consistent with 2017, with over 8 in 10 deeming the information relevant

NET Relevant (%)

Relevance of information (%)

2018	*2017*
85	**88**

32	53	10	1	4

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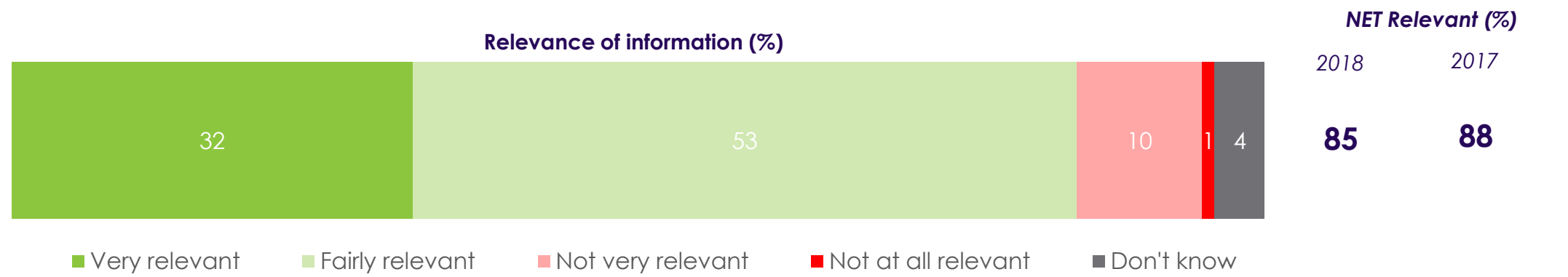
By code

		BSC	CUSC	Dcode	DCUSA	Grid Code	IGT UNC	MRA	SEC	SPAA	STC*	UNC
Net relevant	%	89	82	83	82	83	91	88	90	84	73	86
Net not relevant	%	6	12	14	14	10	9	13	10	10	20	8

*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 (324)

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
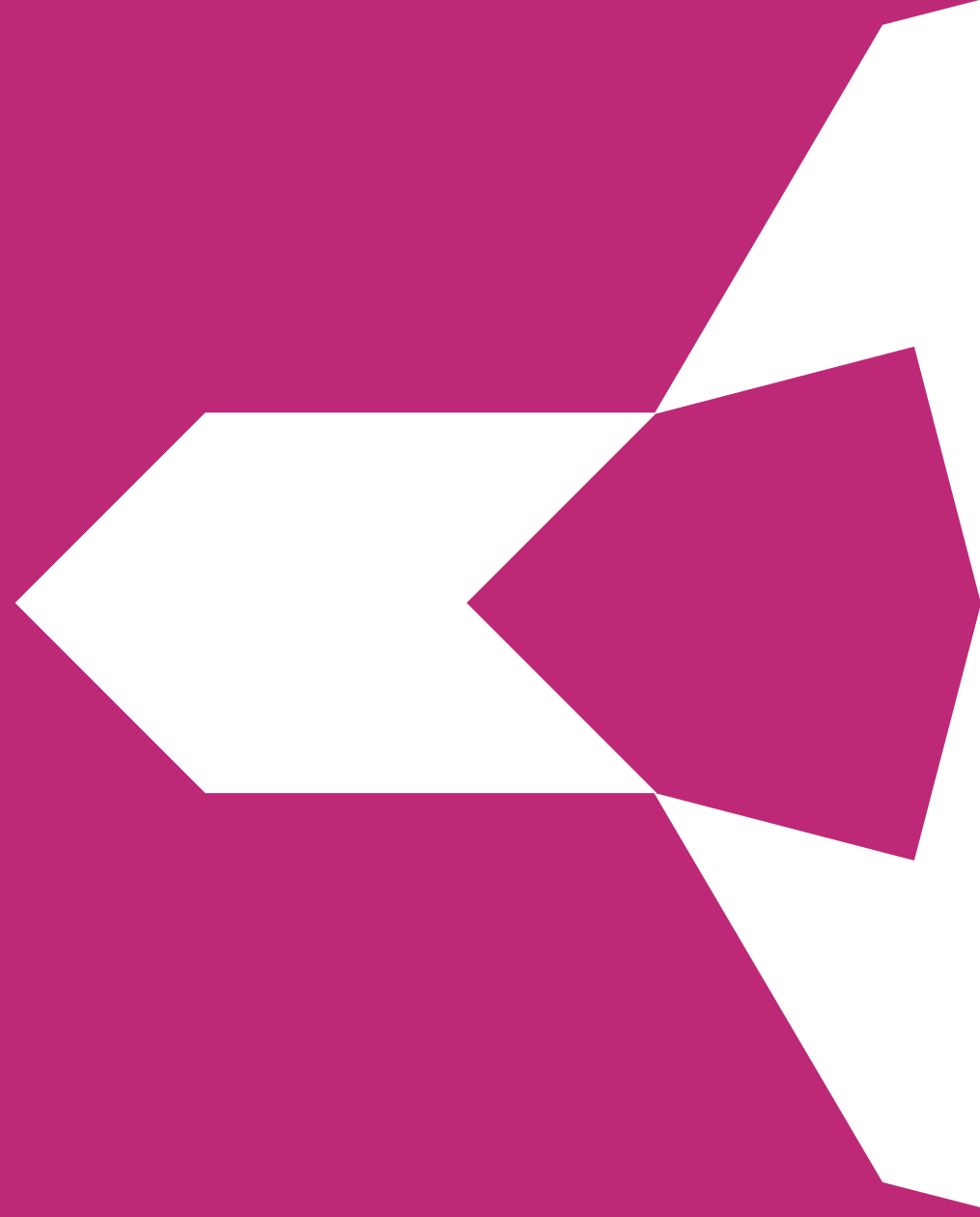
- Overall email and meetings are rated as being more effective than the information provided via websites. This said;
  - It is important to watch out for the timeliness of email
  - There is a perception that signposting could be better so that organisations get a sense on whether emails are relevant to them
  - There is a slight decline in businesses saying they are able to effectively participate in meetings
  - There is also a directional decline in those saying they receive information about the meetings in a timely manner

- As was observed in 2017, in 2018 websites also receive mixed reviews;
  - There is a notable decline in those saying the information provided on the website makes it clear when action needs to be taken
  - Similarly, more organisations are indicating that it not clear if the information provided on the CA websites is relevant to them

- While there are many anecdotal concerns around the modification process, there is a directional increase in reported ease of raising a modification among those actively raising
  - The highlighted concerns may therefore be linked to perceived difficulty which means that others may avoid raising modifications as a result

- Those raising modifications are generally satisfied with the support they received

Email

Although email comms are generally good, there are some aspects that have declined slightly

NET Agree (%)

	2018	*2017*
I receive emails in a timely manner	**81**	**87**
The emails I receive keep me sufficiently informed of any changes or modifications to the code	**82**	**82**
The emails I receive make it clear when action needs to be taken	**73**	**76**
The emails I receive are easy to understand	**73**	**73**

I receive emails in a timely manner: 37 | 43 | 9 | 5 | 2 | 4

The emails I receive keep me sufficiently informed of any changes or modifications to the code: 34 | 48 | 8 | 6 | 2 | 3

The emails I receive make it clear when action needs to be taken: 29 | 44 | 10 | 10 | 2 | 5

The emails I receive are easy to understand: 25 | 49 | 12 | 10 | 2 | 3

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

NET Disagree (%)

	2018	*2017*
It's not clear if the emails in respect of the code are relevant to my organisation	**55**	**63**
I ignore the emails sent by the code administrator in respect of the code	**74**	**81**

It's not clear if the emails in respect of the code are relevant to my organisation: 8 | 25 | 10 | 28 | 27 | 2

I ignore the emails sent by the code administrator in respect of the code: 4 | 12 | 8 | 32 | 42 | 2

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 (325)

☐ ☐ Significantly lower/higher vs. 2017

Pros and Cons

+

- Information is easily accessible via email – it is the most used both by CA to provide information and by organisations to seek information

- 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

"

"Consolidate and simplify emails - single email per day unless urgent, group the points by theme so I skip what isn't relevant easily."

"Send less emails, as sometimes things are pointed out many times but they should keep all the information up to date.."

"The links on the emails should be working.."

-

- Email can however be overwhelming as CA comms are only one of many; this is especially so when several emails related to a code are sent in a single day

- When emails do not include the key take outs, messages can get lost

- The volume of emails can make it difficult for organisations to identify which messages contain vital information, which ones need immediate action or prioritisation against those providing more general updates.
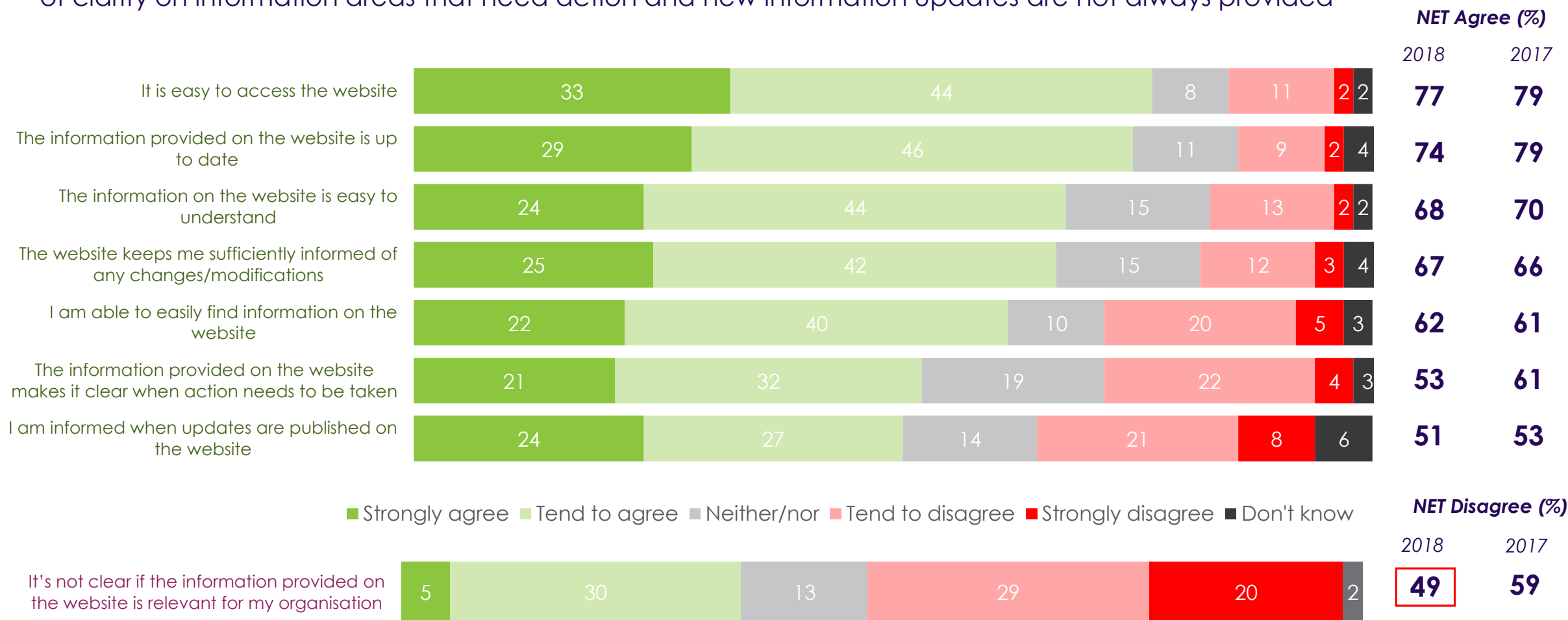
"

"Apart from daily email about each mod, can a weekly one be sent to summing up that weeks email? or give us a choice when subscribe."

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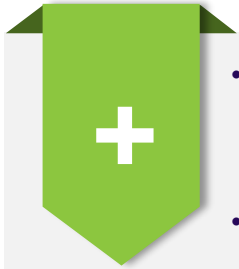
Websites

As was observed in 2017, perceptions around how well websites work are mixed. There are some concerns around lack of clarity on information areas that need action and new information updates are not always provided

NET Agree (%)

	2018	2017
It is easy to access the website	77	79
The information provided on the website is up to date	74	79
The information on the website is easy to understand	68	70
The website keeps me sufficiently informed of any changes/modifications	67	66
I am able to easily find information on the website	62	61
The information provided on the website makes it clear when action needs to be taken	53	61
I am informed when updates are published on the website	51	53

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

NET Disagree (%)

	2018	2017
It's not clear if the information provided on the website is relevant for my organisation	49	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 (182)

Significantly lower/higher vs. 2017
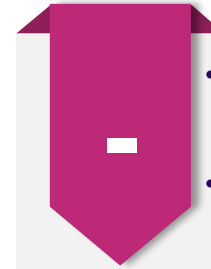
53

Pros and Cons

+

- Customers value having information on websites, they use them to keep up to date with various code changes
- Information included on websites can be insightful, providing businesses with the depth of understanding they require to navigate codes

-

- There are some concerns around the ability of customers to easily navigate websites, and limited signposting
- National Grid website is specifically mentioned as in need of attention as recent developments have made it difficult for businesses to effectively access code information
- There is a decline in the proactive use of websites (50% in 2017 vs 28% in 2018). While customers perceive websites as not fit for purpose, use may continue to decline

"Feels that information is available if you want it and know where to get it. Everything is on the relevant websites but it is often easier to google it rather than search within the actual website particularly National Grid ones for Grid and CUSC."

"Gemserv have lots of great subject matter experts but need to improve their communication expertise. This would help ensure that the website is up to date, would improve their online communication and provide a more professional service to SEC parties."

"Ensure all working group meeting details/papers are uploaded to the website."

"Website needs to be improved by clarity where things are located."

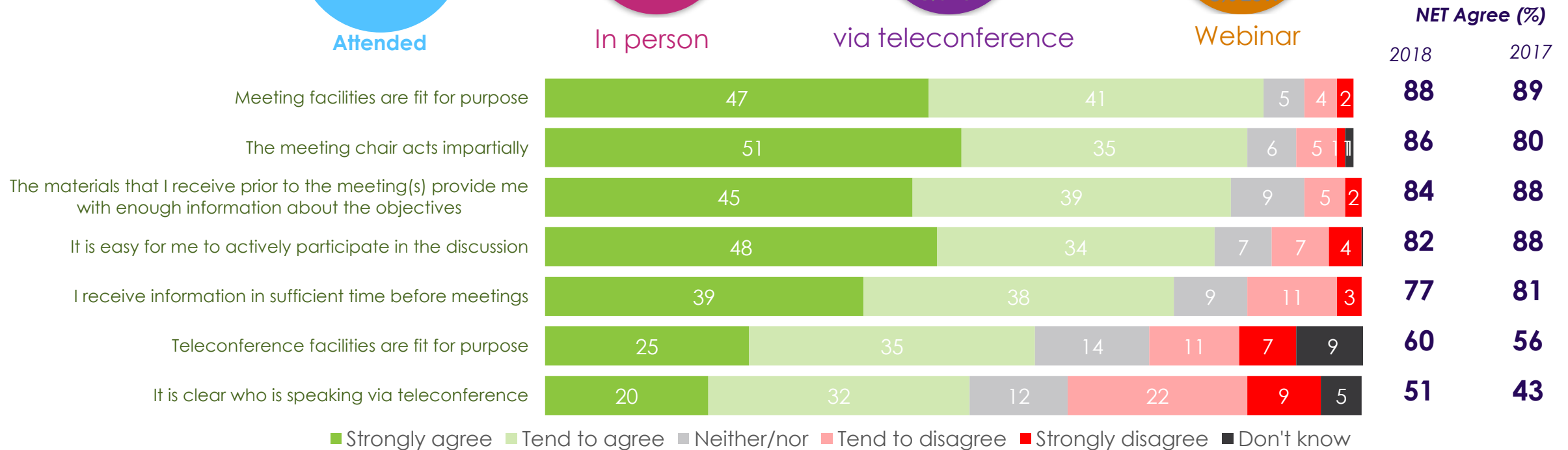"Update the website every time a consultation document changes state."

"I am generally happy with the code administrator for the MRA, however with regards to the website, the search facility could be enhanced and where results are found, display in date order."

"Making sure the core service meets standards before trying to sell/expand services. The website is poor and has been for years."

Meetings

There are some improvements in the way meetings are convened. The chair is perceived as acting with greater impartiality and facilities around teleconferencing are improving

37%
43% 2017
Attended

32%
39% 2017
In person

20%
18% 2017
via teleconference

11%
8% 2017
Webinar

NET Agree (%)

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	2018	2017
Meeting facilities are fit for purpose	47	41	5	4	2		**88**	**89**
The meeting chair acts impartially	51	35	6	5	1	1	**86**	**80**
The materials that I receive prior to the meeting(s) provide me with enough information about the objectives	45	39	9	5	2		**84**	**88**
It is easy for me to actively participate in the discussion	48	34	7	7	4		**82**	**88**
I receive information in sufficient time before meetings	39	38	9	11	3		**77**	**81**
Teleconference facilities are fit for purpose	25	35	14	11	7	9	**60**	**56**
It is clear who is speaking via teleconference	20	32	12	22	9	5	**51**	**43**

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

Pros and Cons

+

- Code Chairs are generally considered impartial and effective *(although there are some concerns around dealing with organisations that raise strategic modifications)*

- 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

-

- There is a slight decline in the proportion of businesses who say they have attended a meeting (43% in 2017 vs 37% in 2018)

- Teleconfrence facilities have improved in the last year, however there is scope for further developments as some are still experiencing issues

- Perception that it is difficult for companies with limited resource to attend meetings as this can be a whole day *out of the office*. This can be compounded when meetings are scheduled for afternoons

"

"Putting all the information relating to a change with the change on the change proposals page. Currently you have to look at the documents for change board meetings to get all the documents relevant for a particular change which is fine for those in the know but difficult for those who want to find out about a change proposal and who have are not closely engaged with the change process."

"

"To be more organised during meetings, they tend to stay too long on one topic during a meeting."

"Discussions can become agitated, the Chairman asks each of the parties to put together a one or 2 page paper so that he can carefully consider the information."

"More evenly distribute the expertise within the team and across meetings"

Raising modifications

In line with 2017, 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:

2018

38%	10%	6%	5%	4%
My organisation has not felt the need to raise modifications	Lack of time	Lack of expertise	I did not feel I had the know how	It's not applicable for my organisation

2017

29%	14%	6%	3%	7%
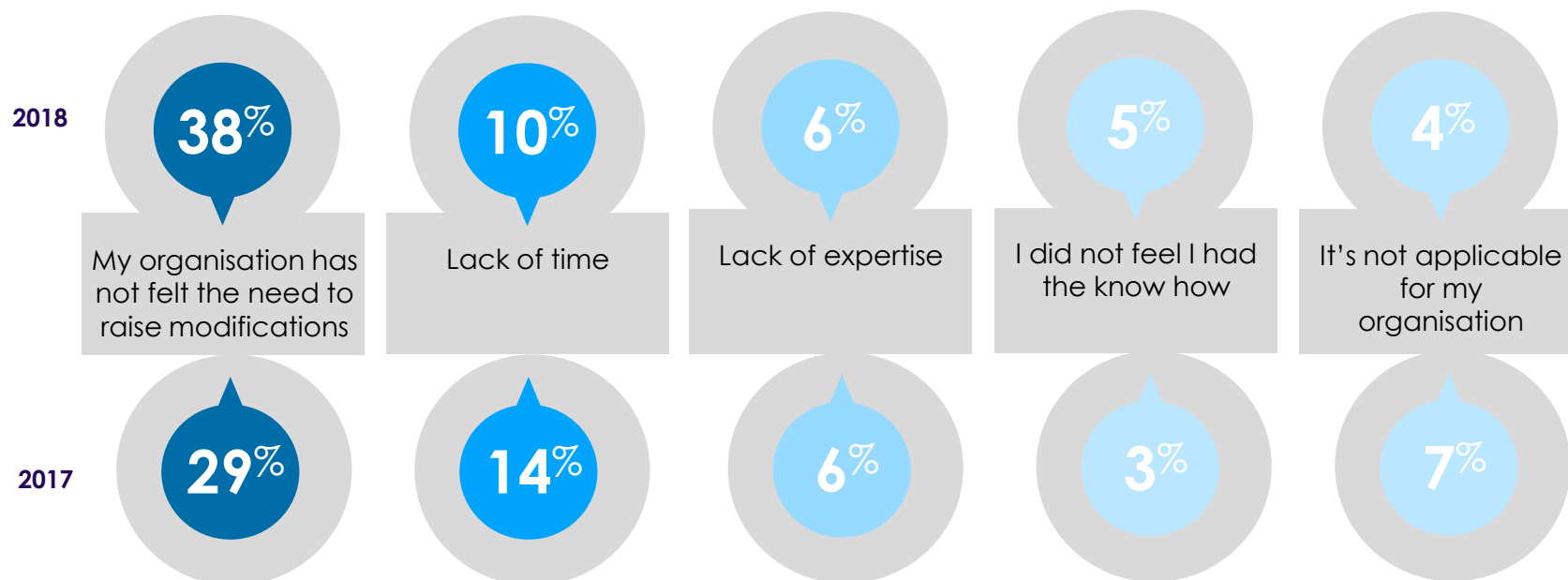
8% stated other reasons for not raising modifications:

"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."
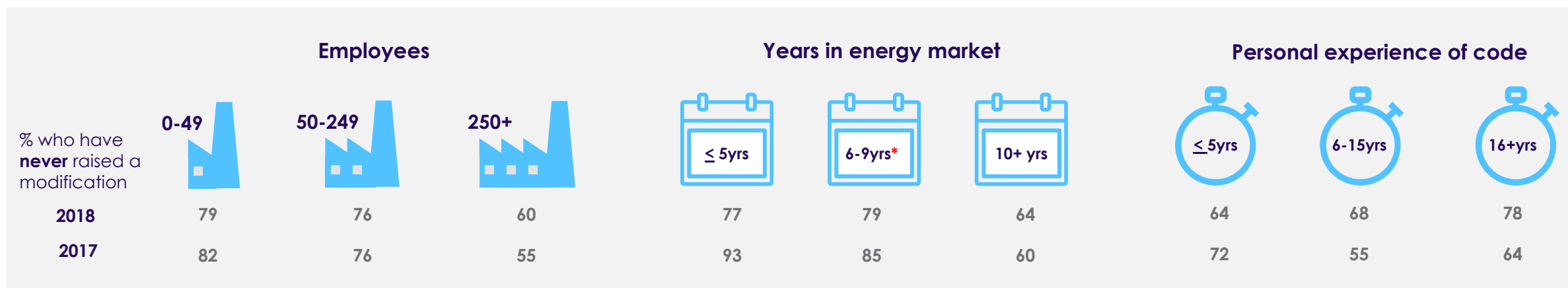
"We're a very new company and we already have so much on our plate. Leave it to the experts elsewhere."

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 (2018 – 216, 2017 - 204)
Q27. Why have you not raised any modifications over the last year? Base: All respondents (2018 – 216, 2017 - 204)

Raising modifications

There are some changes in the profile of organisations never raising modifications

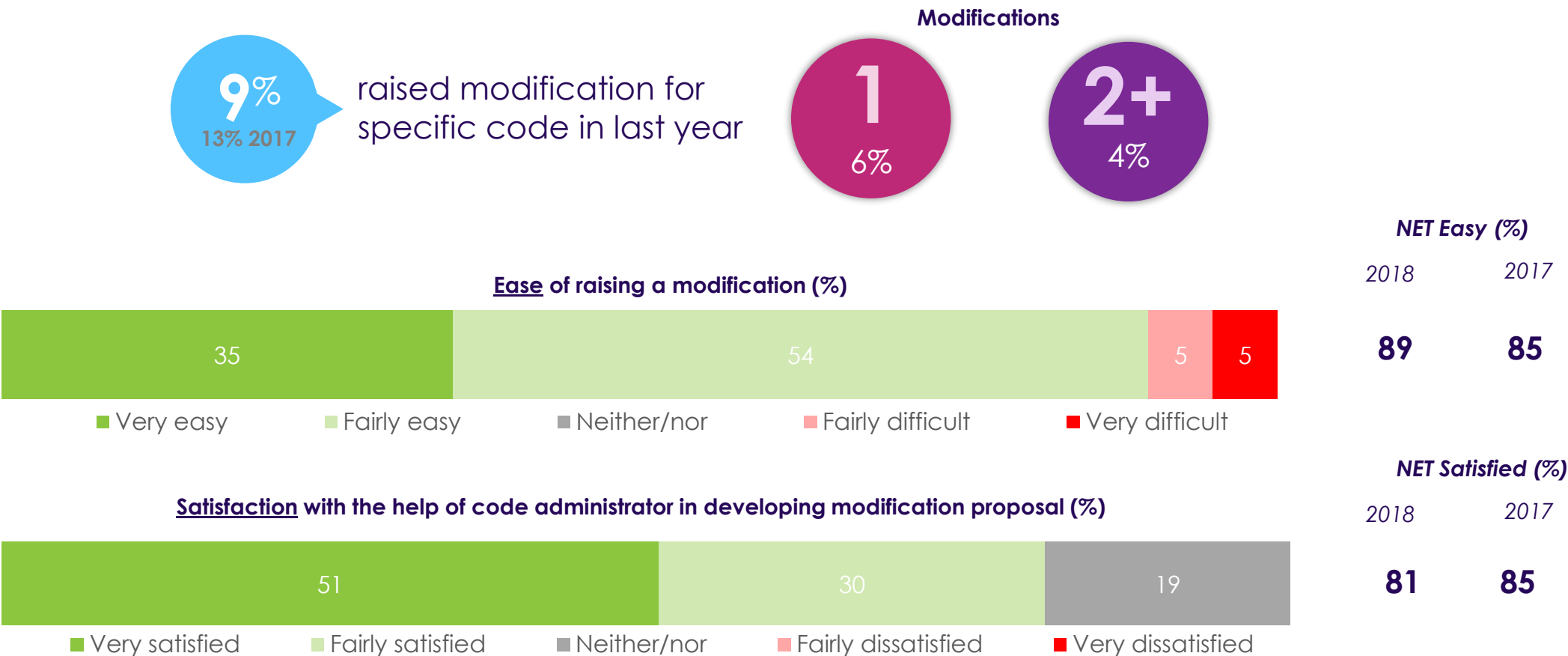|	Employees			Years in energy market			Personal experience of code		
	0-49	**50-249**	**250+**	**≤ 5yrs**	**6-9yrs***	**10+ yrs**	**≤ 5yrs**	**6-15yrs**	**16+yrs**
% who have **never** raised a modification									
2018	79	76	60	77	79	64	64	68	78
2017	82	76	55	93	85	60	72	55	64

- There are some directional changes for smaller and larger organisations. Slightly more smaller organisations are raising modifications, while fewer larger organisations indicate the same

- More notably, those who have been in the market for five years ore less are raising significantly more modifications that they did in the previous year

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

Perception of modifications process

The modification proposal process is rated highly

9%
13% 2017

raised modification for specific code in last year

Modifications

1
6%

2+
4%

Ease of raising a modification (%)

Very easy	Fairly easy	Fairly difficult	Very difficult
35	54	5	5

■ Very easy   ■ Fairly easy   ■ Neither/nor   ■ Fairly difficult   ■ Very difficult

NET Easy (%)

2018	2017
89	**85**

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

Very satisfied	Fairly satisfied	Neither/nor
51	30	19

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

NET Satisfied (%)

2018	2017
81	**85**

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 (397)
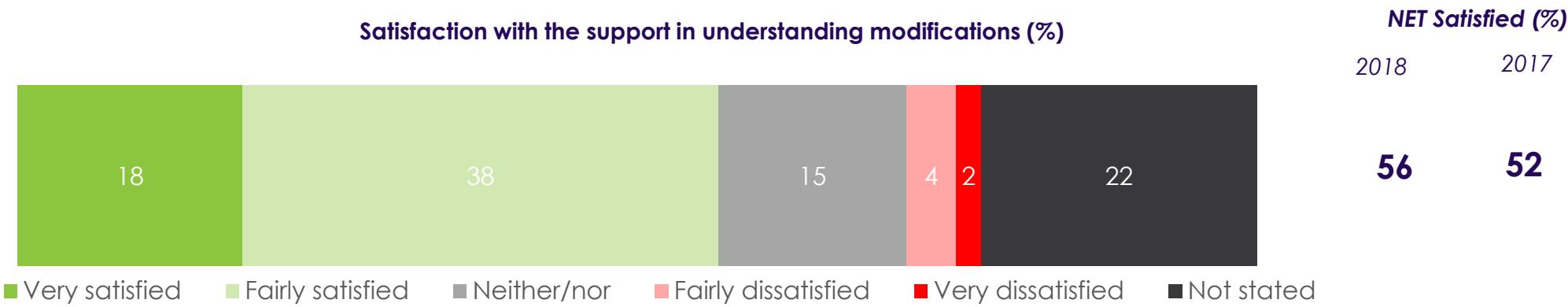
Q24/Q24b. And how easy or difficult was the process of raising a modification in respect of the code? Base: All responses for those raising modifications in respect of the code within the last 12 months (37)

Q25/Q25b. How satisfied were you with the help the code administrator gave in the development of your modification proposal? Base: All responses for those raising modifications in respect of the code within the last 12 months (37)

Understanding modifications

There is a modest increase in organisations reporting that they are satisfied with the modification process

Satisfaction with the support in understanding modifications (%)

NET Satisfied (%)

2018   *2017*

| 18 | 38 | 15 | 4 | 2 | 22 |

56   **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	%	66	50	69	53	54	47	50	53	59	58	56
Net dissatisfied	%	9	8	3	11	6	3	7	11	5	0	3

*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 (397)

Understanding modifications process
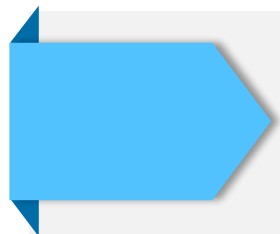
Businesses feel that the modification process should be a level playing field and look to code administrators (and also Ofgem) to ensure this

It is important to continue to simplify processes so that all business levels are clear about the impact of any changes

"

"It is a labyrinthine industry and some other organisations pursuing modifications are not sure they are going out to a representative group for consideration"

"Feel very vulnerable that it is not always clear that any modification may have a detrimental impact on us (they seem to be driven by the large central generators, who do not necessarily wish to promote distributed generation"

"They need to make it clear what modifications make impact on the business."

"The process is dissatisfying with disingenuous people *sabotaging* a mod in the middle of implementation as they know the benefit to you so they increase their mark-up so it messes with Cost/benefit analysis. So you end up rejecting more modifications since there's an inflation of costs"
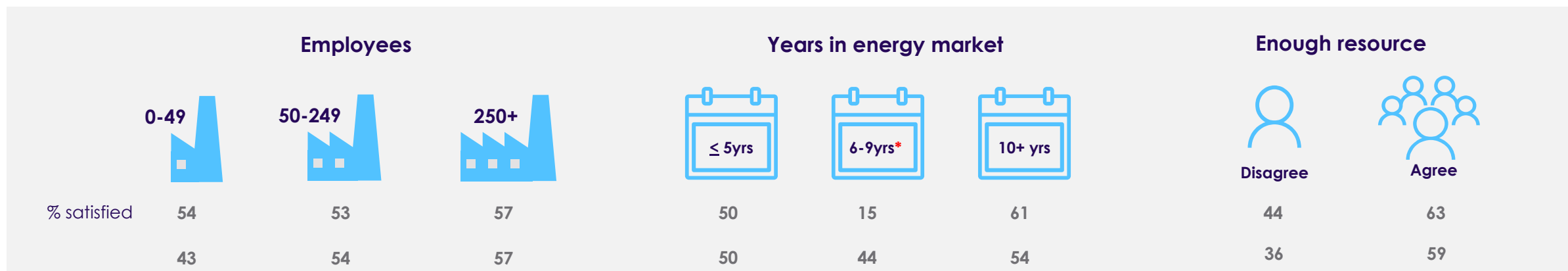
"There should be clear guidance for new market entrants to sign in to the code and understand procedures/modifications of the code."

"Review Code Governance, modification and working group arrangements. Recent changes have reduced the ability to have technical discussions related to the grid code and focus seems to be more on process rather than achieving a consensus opinion amongst parties on the perceived technical defect."

"We have a team internally that interface with code administrators and they have to rewrite any modifications into plain English for anyone working in Operations or Customer facing. Avoid jargon!"

Understanding modifications

Satisfaction remains modest across all groups

	Employees			Years in energy market			Enough resource	
	0-49	50-249	250+	≤ 5yrs	6-9yrs*	10+ yrs	Disagree	Agree
% satisfied	54	53	57	50	15	61	44	63
	43	54	57	50	44	54	36	59

There are positive shifts for:

- Smaller businesses, who report greater satisfaction with the process

- Those with limited resource also report greater satisfaction compared to 2017

- As we have seen elsewhere, organisations that have been in the energy market for 6-9 years are less satisfied; this is the most notable drop for this group across all metrics

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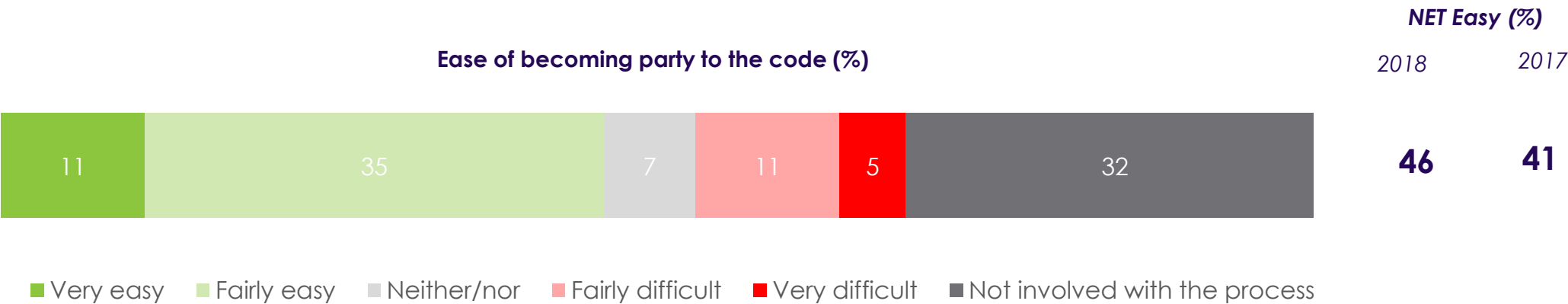**very small base size
interpret with caution

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 (397)

Accession process

31% employed by an organisation that became party to, or began the process to become party to, the code in the last five years

There is a modest increase in reported ease of the accession process. This said, when those not directly involved in the process are excluded, ease stands at 67%
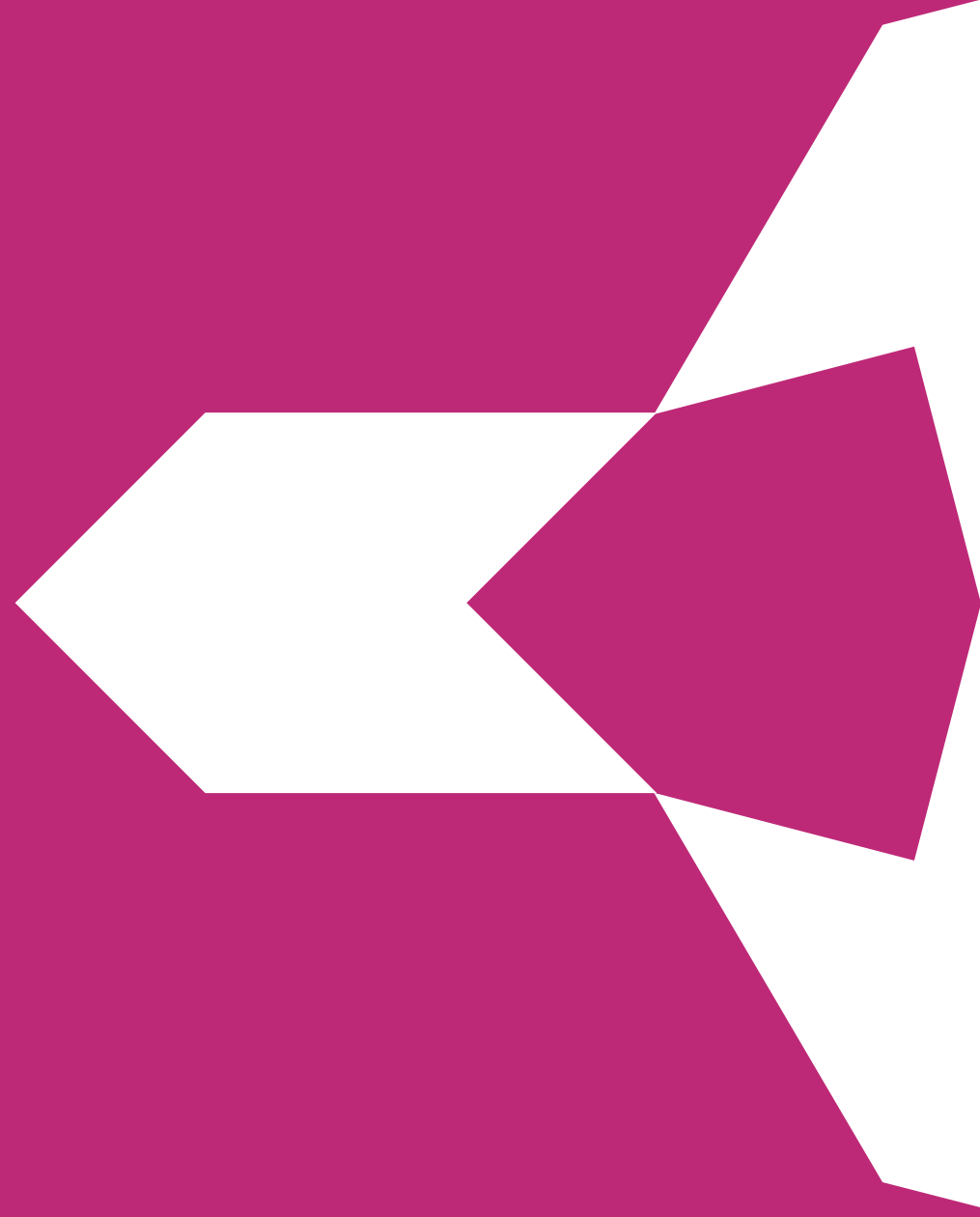
NET Easy (%)

2018   2017

Ease of becoming party to the code (%)

11	35	7	11	5	32

46   **41**

■ Very easy   ■ Fairly easy   ■ Neither/nor   ■ Fairly difficult   ■ Very difficult   ■ Not involved with the process

"It is a risk to everybody if the accession process isn't robust."

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 (327)

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 (103)

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

10% **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

7% **Ease of use**
e.g: user friendly, more user friendly

6% **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

5% **Improve meeting arrangements**
e.g: Improved meeting arrangements e.g. more meetings, fixed venue,

Only improvements mentioned by 5% or more organisations are shown

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)

65

Suggested improvements

"Putting all the **information** relating to a change with the change **on the change proposals page**. Currently you have to look at the documents for change board meetings to get all the documents relevant for a particular change which is fine for those in the know but difficult for those who want to find out about a change proposal and who have are not closely engaged with the change process."

"There is no **newsletter for me to subscribe** to.

"Code administrator needs to step up to the plate and become a proactive force to **encourage timely evolution** of the UNC. The code administrator has **allowed vested interests in Workgroups** to filibuster and frustrate changes that are in the interests of the GB consumer."

"More **user friendly/helpful to new entrants** without resource dedicated to specific areas - we tend to wear many hats!."

"They need to **schedule In accordance to the guidance they have provided** not in accordance to their own convenience. Scheduling is a big problem which they don't get right.."

"Send **less emails**, as sometimes things are pointed out many times but they should keep all the information up to date.."

"They need to improve their **teleconference** services."

"Make it all **easy to understand**."

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 understand that administering the codes is complicated and remain positive in their assessment of the code administrators they deal with

A desire for similar improvements to 2017 are identified and centre around support and information provision, and ways to consolidate this

Certain aspects of service do stand out as having improved and this should be positively received

There continues to be some correlation between perceptions of service and familiarity /capability of dealing with the codes

How CAs operate and have been appointed can influence the perception of service received

Recommendations

Ensure CAs are held to a consistent standard of service even if they cannot operate in a consistent manner

Information should be developed so it can be easily digested and flagged for action if required

Where information is provided, ensure it is kept up to date and relevant

Continue to support smaller/new entry organisations so they can actively participate

futurethinking

Future Thinking takes a consultative approach to market research with commercial focus driving everything we do. That's why we focus our attention on the three key areas that drive competitive advantage: Launch, Communicate, Experience.

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