

Public

ELEXON 2014 customer survey results

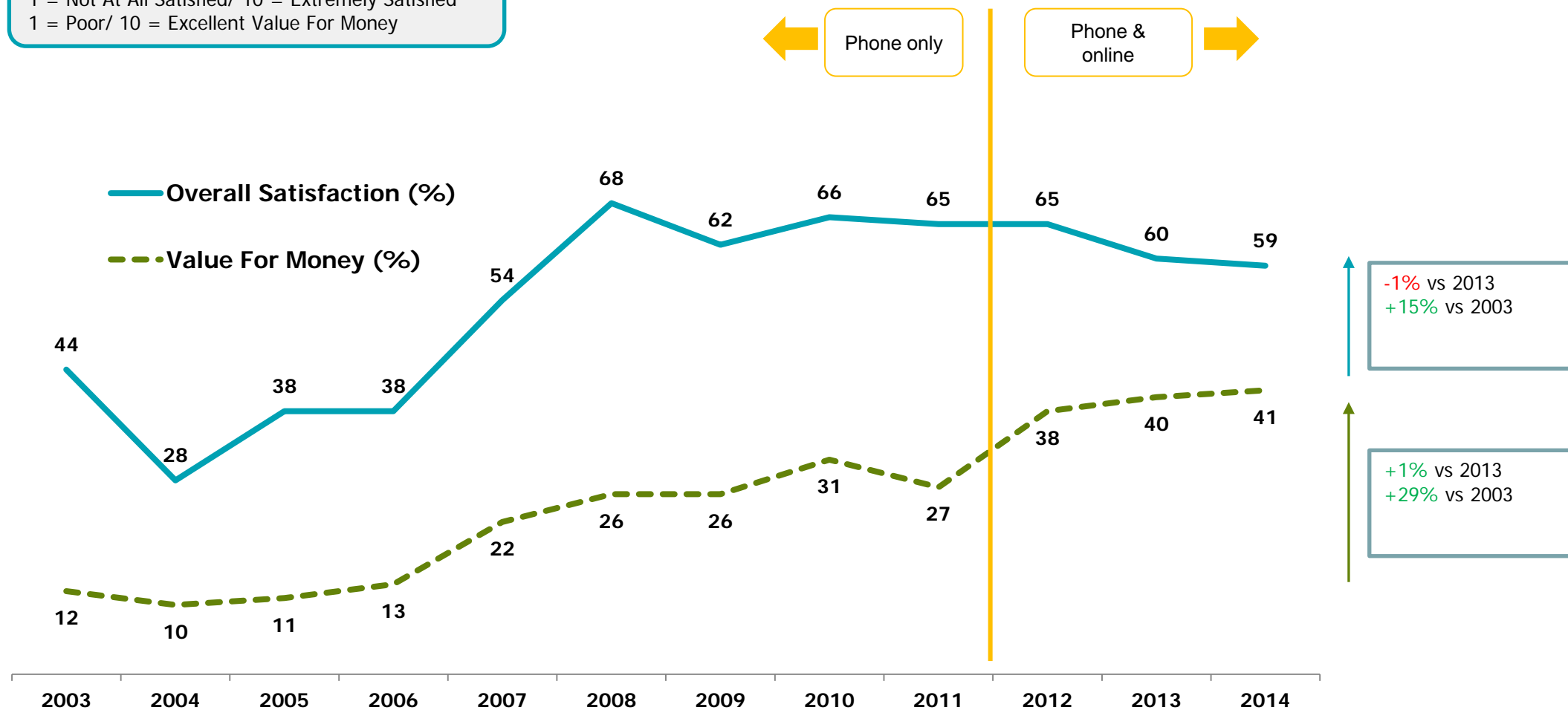


Key themes

- Short, online quantitative survey (116 responses) backed up by 12 in-depth qualitative interviews.
- The fast rate of change in the industry is placing increasing pressure on market participants. They are relying more than ever on ELEXON to stay focused on fulfilling its core role of administering the BSC to support them in this.
- ELEXON has maintained its high level of satisfaction & value for money overall. However, this conceals clear satisfaction improvements with the 'Big 6' (up 11% to 60%), but a fall (of 8% to 58%) with other companies.
- Participants are less positive about a number of areas than a year ago: Performance Assurance, service from OSMs, responsiveness of the Service Desk.
- A number of opportunities have been highlighted to improve overall communication with stakeholders including: update the website, more-concise documentation, exploit new media more, expand training opportunities & change the format of reporting.

Overall satisfaction and value for money (1)

SCORE 8+ (Out of 10)
1 = Not At All Satisfied/ 10 = Extremely Satisfied
1 = Poor/ 10 = Excellent Value For Money



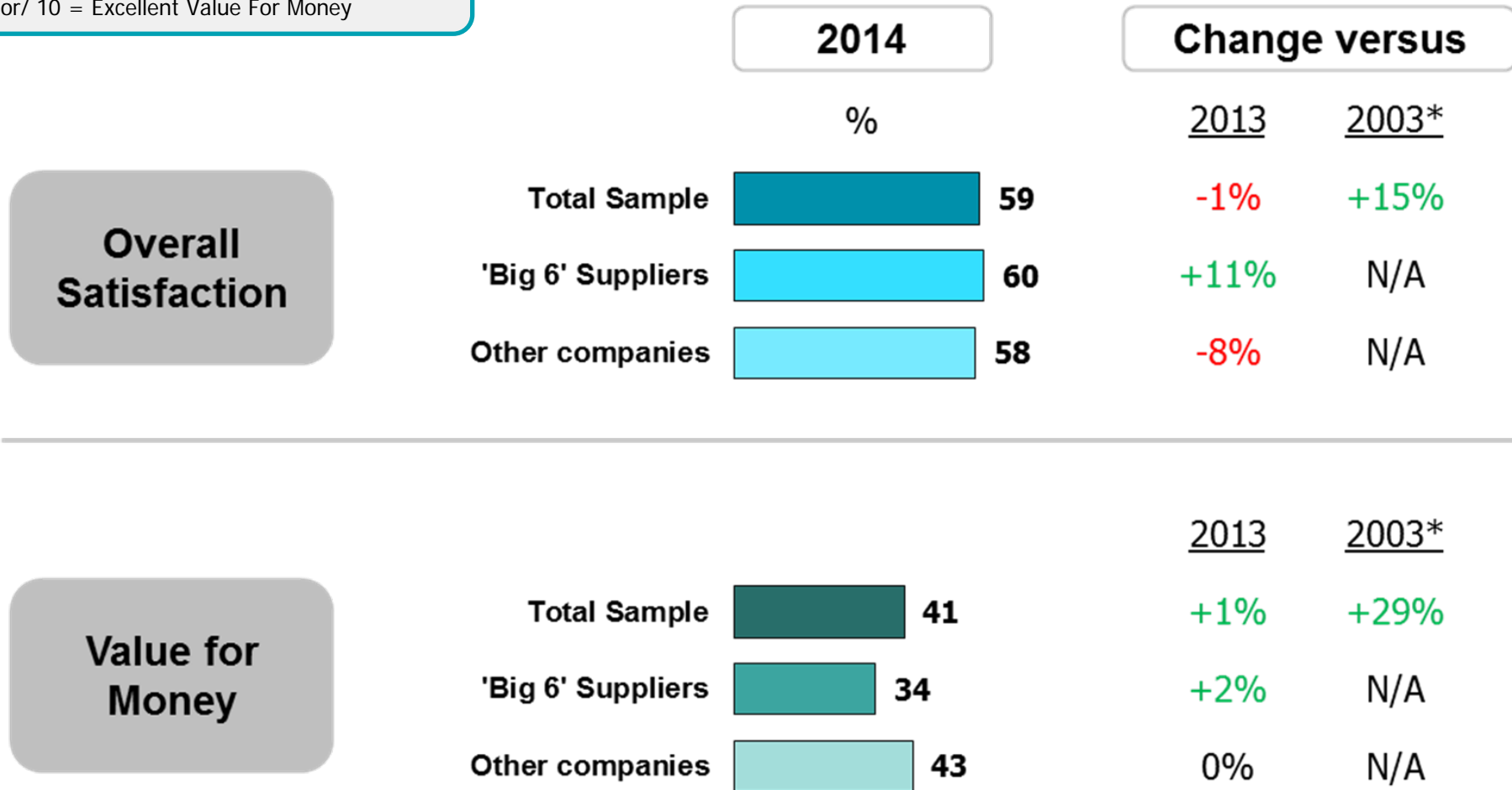
Longer term, value for money has plateaued after a long period of improvement and levels of satisfaction remain relatively stable

Overall satisfaction and value for money (2)

SCORE 8+ (Out of 10)

1 = Not At All Satisfied/ 10 = Extremely Satisfied

1 = Poor/ 10 = Excellent Value For Money



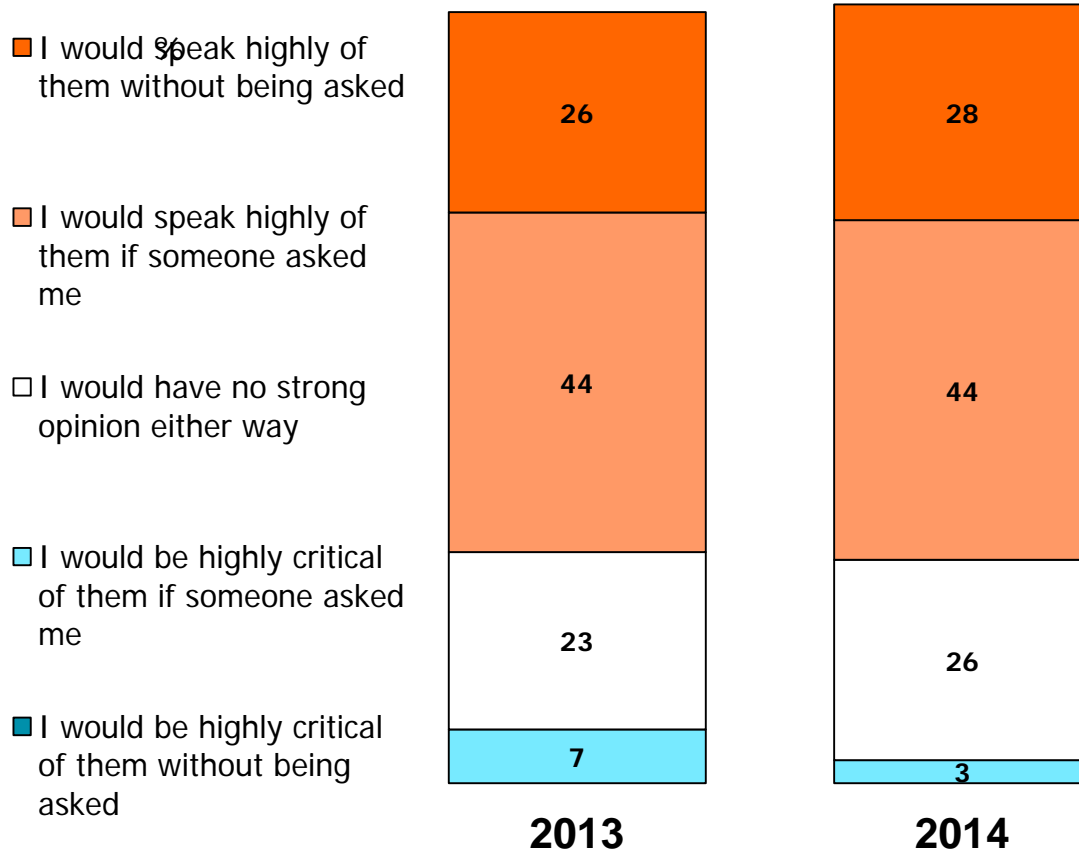
Levels of satisfaction have not changed overall since last year. However there has been a marked increase amongst the 'Big 6' suppliers and a decline amongst the other companies. Value for money remains stable across the board.

Advocacy

Net Recommendation Score:

+63%

+69%



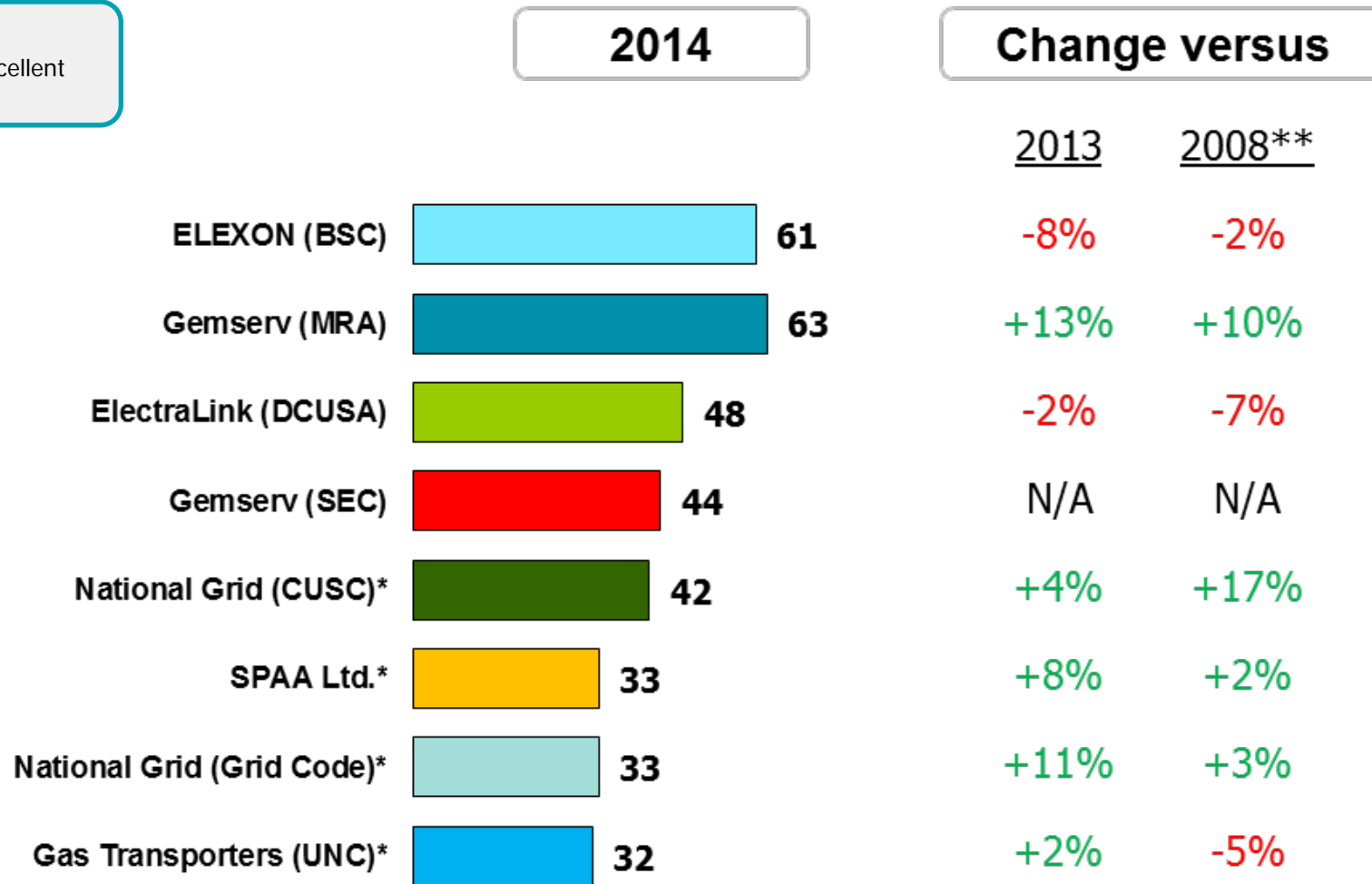
Net Recommendation Score (%)	2013	2014
Total Sample (116)/ (116)	+63	+69
'Big 6' Suppliers (37)*/ (35)*	+43	+71
Other Companies (79)/ (81)	+72	+67
BSC Party (82)/ (68)	+59	+70
Supplier Agent (46)/ (43)	+64	+72
Committee/ Panel Member (40)*/ (36)*	+45	+75
Industry Body (11)*/ (16)*	+73	+63
Operations (39)*/ (44)	+72	+84
Compliance (32)*/ (28)*	+72	+66
Regulatory Affairs (27)*/ (25)*	+48	+66

***CAUTION: Low Base Size**

Net recommendation has improved since last year particularly amongst 'Big 6' companies and Committee/ Panel members

Comparative ratings

SCALE 1 to 10
1 = Poor/ 10 = Excellent
8+ Scores shown



*CAUTION: Low Base Size

** Results before 2012 based on phone interviews only (no online surveys)

ELEXON's rating is still well ahead of the competitive average. Qualitative interviews revealed no clear rationale for Gemserv's improved scores

Areas for improvement – spontaneous feedback

- 41% gave ELEXON a score of less than 8 out of 10 for Overall Satisfaction. 75% of those gave spontaneous suggestions for improvements:



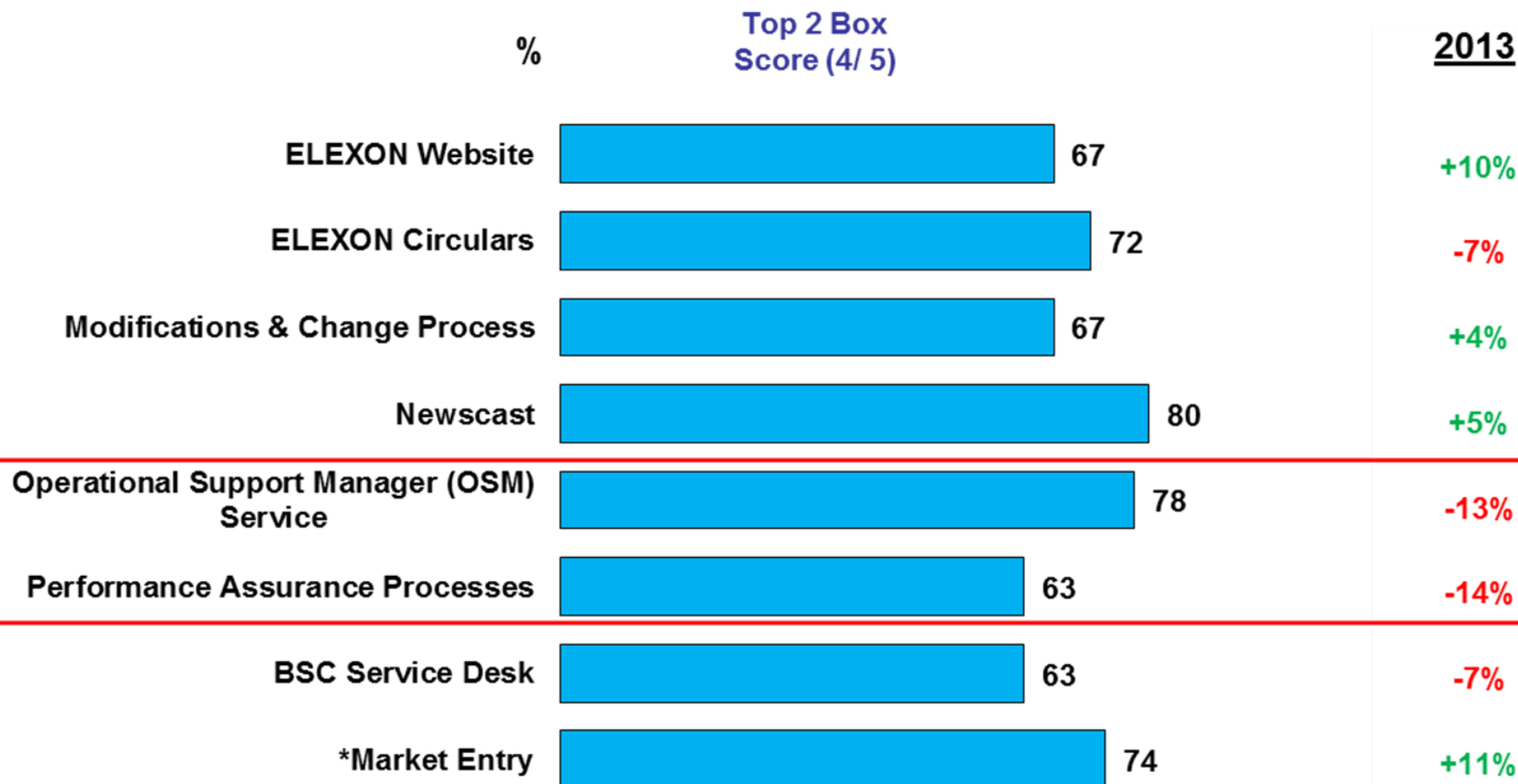
Base: Those rating ELEXON 1 to 7 out of 10 for overall satisfaction (48)
NB: Responses on less than 3 people not shown

Rating of ELEXON service areas

SCALE 1 to 5
1 = Not At All Well/ 5 = Very Well

2014

Change versus



*CAUTION: Low Base Size

Newscast & the OSMs are still the most highly rated service areas, but participants are notably less positive than last year about the OSM service & the Performance Assurance processes (& also the BSC Service Desk).

Qualitative feedback on ELEXON's role

Most would welcome more collaboration:

- Facilitate, engage, co-ordinate, & promote dialogue
- Bring expertise & knowledge to the benefit of the whole industry
- Influence, but not direct or drive agenda
- Help support the interests of market participants with governing bodies

"If I were ELEXON I would try to make myself a better critical friend to market participants & to the industry. I don't think they've got an obligation to do that but if they want a critical role & to be someone who's smoothing change... ELEXON need to stand up & do that." (BSC Party)

"No I think ELEXON should concentrate on what they're doing & never ever waste any time again on ELEXON spreading itself to do any other business. It was an extremely un-helpful and regrettable period..." (Smaller supplier)

"I have the impression that Elexon is forward thinking and has a good grasp of what is going on. They keep moving forward to deal with new challenges providing a lead for the industry to follow."

Next steps

- Some actions have already been identified
 - Review the support & training provided to OSMs – including ‘soft’ skills training & induction process
 - Work harder to reduce unnecessary detail in written comms & create more ‘joined-up’ cross-referencing of documents
 - Expand range of training & seminars on offer to participants
- A working group of colleagues from across the company has been set up to look in more detail at the results and put in place an action plan