Annual Vulnerability Report

2023/2024

SP Energy Networks

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Introduction

Going above and beyond for our vulnerable customers is a core part of our role as an essential service provider with deep roots across the communities we serve. Over the ED1 period, we underwent a significant transformation that positioned the needs of vulnerable customers at the centre of our DNA, from the boardroom to the field. Starting from our core role in preventing and mitigating the impact of power cuts, to programmes aimed at delivering extra help such as tackling fuel poverty and providing welfare support, our strategy, plans and operations have evolved along with customers' needs, driven by insight and engagement.

Kendal Morris
Customer Service Director

The year 2023/24 has been foundational for our ED2 programme. We worked hard to build on the solid foundation established in ED1 to evolve our partnerships, tools, and processes that will allow us to achieve our expanded ED2 ambition. At the same time, we have continued to focus on customers' pressing needs, from delivering excellent support during emergencies to offering a range of extra help aimed at improving their welfare. These efforts were bolstered by the outstanding performance of our teams in recruiting customers to the Priority Services Register (PSR) – we are proud to have now registered over 91% of all eligible households, well above our ED2 Y2 and Y5 targets (74% and 80% respectively), in the first year of ED2 alone.

While we recognise that this was a year of transition, we took the necessary steps to satisfy and respond to our customers' needs and deliver significant impact whenever possible. Firstly, we established commercial contracts with four key delivery partners that will support tens of thousands of customers over the next year alone in addressing fuel poverty situations and guiding their energy transition journey. An initial trial with 62 customers generated a net benefit (NPV) of £1,280 and was well received as reflected in our customer satisfaction (CSAT) score of 9.42/10.

Above and beyond these small-scale trials, we continued to offer wider support measures to our customers. These services, tailored to their needs but offered by partners not funded by SPEN, focused on both tackling fuel poverty and addressing wider social issues, such as dementia or loneliness and are referred to as 'referrals' throughout this document. Building on the relationships we established throughout the ED1 period, we delivered 1,916 fuel poverty and 1,814 welfare referrals which generated immediate benefits of £746,565 over the past year alone.

As we enter the second year of ED2, we are excited to embark on an extensive, yet targeted, programme of bespoke support for our most vulnerable customers. With our four new delivery partners on board, we are fully on track to achieve our ambitious targets: we will deliver bespoke fuel poverty and energy transition advice to 100,000 customers to 2028, generating a net benefit (NPV) for customers of at least £20m. This document provides an overview of our achievements in setting the bar higher for our vulnerable customers, as well as our progress in delivering our vulnerability strategy and the baseline principles set by our regulator, Ofgem.

In this section, we present the foundation of our 2023/24 AVR and cover our role in protecting vulnerable customers, the dynamics of vulnerability in our region and our overarching vulnerability strategy.

Our role in protecting vulnerable customers

Meeting the needs of vulnerable customers is one of SPEN's core values and a central tenet of our organisational vision. The multidimensional nature of vulnerability means that customers' needs go far beyond what we can address as a DNO.

OUR CORE ROLE **OUR AMBITION**

| Addressing customer needs during emergencies | Tackling fuel poverty | Removing obstacles to joining the energy system transition | Improving welfare |

Dynamics of vulnerability in our region

We believe 'consumer vulnerability' reflects when a person's circumstances and traits, combined with aspects of the energy market, make them less able to protect or represent their interests compared to an average consumer. We therefore take into consideration a wide range of situations, from social and economic factors to personal circumstances and health issues where the PSR plays a key role (e.g. customers who rely on electricity to operate vital medical equipment, customers with long-term mobility or disability needs).

We also recognise that the very definition of vulnerability is far from static. Wider societal factors and trends must also be considered on an ongoing basis (e.g. how customers in fuel poverty and/ or those who are digitally excluded may struggle to adapt to a modern, digitalised world). Therefore, maintaining an up-to-date and granular understanding of the situations that impact our customers is vital to the success of our vulnerability strategy. Understanding the nature of vulnerability, its many angles and the way it impacts our customers in alignment with their unique circumstances is a central facet in achieving our aim to deliver meaningful and lasting support.

Our approach to understanding the vulnerability dynamics in our region focuses on vulnerability data, close partner engagement and an annual research programme. Recently, this approach has moved towards sophisticated data analysis to build on the already embedded engagement and research work established throughout ED1. We gather and process vulnerability data in various ways to gain a multidimensional understanding of vulnerability that is relevant to our role as a DNO and tailored to the unique characteristics of our communities. In doing so, we rely on the following data to understand vulnerability dynamics:

- **PSR data :** The analysis of PSR needs codes to identify personal characteristics.

- **Fuel poverty data :** Insights related to household income, household characteristics and energy efficiency across our region. We leverage existing fuel poverty statistics (for our SPM area) and extrapolate this approach to area for which neighbourhood-level national statistics are not available to ensure comprehensive coverage of fuel poverty insight.

- **'Risk of being left behind' index :** A powerful index developed via our VEST flagship innovation project that expresses the average level of risk faced by customers in every LSOA we serve. The index captures tens of publicly available datasets ranging from tenancy status to reliance on government benefits across thousands of local communities in our areas.

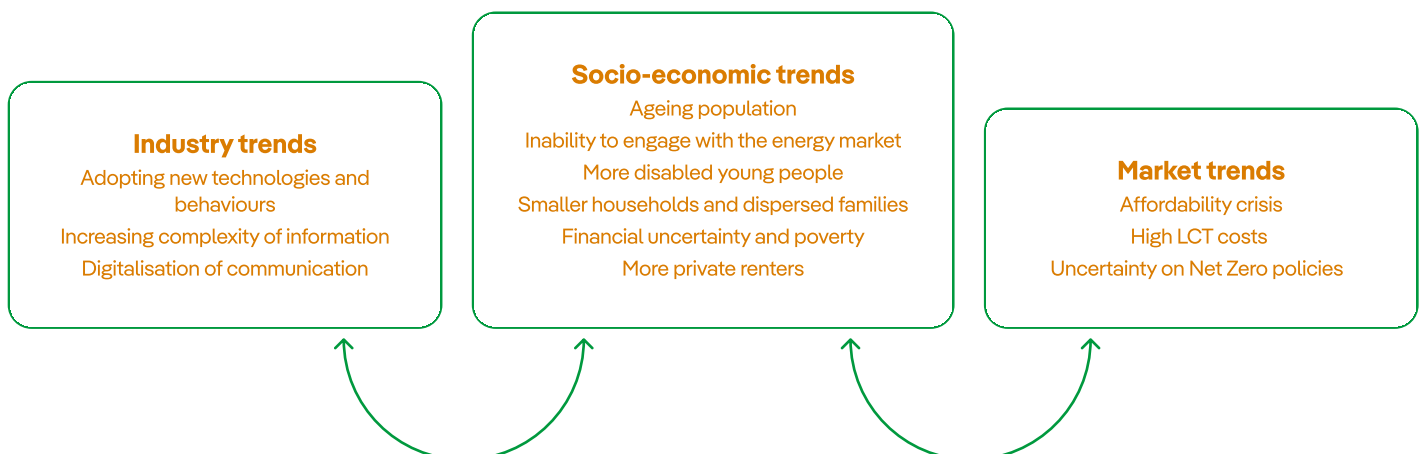## Case study: Developing the industry's first unified view of vulnerability

Through the Vulnerability in the Energy System Transition (VEST) project, we developed an innovative 'risk of being left behind' index based on in-depth engagement with 2,500 customers from a representative set of Lower Layer Super Output Areas (LSOAs) – small geographical areas with a limited number of broadly similar customers – across our network area. This allows us (i) to understand what drives the risk of being left behind and (ii) to map the level of risk faced by customers throughout our network area at a local level.

As part of this work, we merged three datasets (PSR data, fuel poverty data and the 'risk of being left behind' index) to achieve the industry's first unified view of vulnerability. This is now captured in the VEST tool, which was developed to determine which customer characteristics are associated with the risk of being left behind and, in turn, to map the level of risk faced by customers throughout our network area in a granular manner.

The three datasets feed into a unified platform that mathematically joins these variables to provide a vulnerability score for each of the 7,000 communities we serve. In doing so, it also describes the key issues that drive the experience of vulnerability for the average customer in each area and empowers users to gain insight on all relevant vulnerability situations. These insights are allowing us to shape the development of local partnerships to address key local blockers, develop collaborative groups of organisations to tackle specific combinations of blockers and determine potential barriers that customers face while allocating resources to local projects effectively. All of this enables decision-making processes that have a long-lasting impact on our customers' lives in a tailored manner.

Vulnerability trends

The vulnerability trends impacting customers in our region are presented in the accompanying diagram. These have been identified through an annual research programme, with insights dating back to the ED1 period, as well as bespoke research conducted through developing our ED2 vulnerability strategy. Significant research has gone into the extraction of these insights, which is now complemented by sophisticated data analysis (via the VEST tool) to understand where these issues overlap on the ground and to what degree we can take action.

Industry trends
Adopting new technologies and behaviours
Increasing complexity of information
Digitalisation of communication

Socio-economic trends
Ageing population
Inability to engage with the energy market
More disabled young people
Smaller households and dispersed families
Financial uncertainty and poverty
More private renters

Market trends
Affordability crisis
High LCT costs
Uncertainty on Net Zero policies

Our vulnerability strategy

We introduced our vulnerability strategy in 2015. It has since been continually tested and refined in collaboration with our customers and stakeholders. It is designed to be dynamic and therefore allow us to address both immediate and long-term challenges. Our strategy rests on two elements: a mission statement, which provides our objectives in supporting vulnerable customers, and a set of action statements that are in place to describe the levers through which we operate to achieve our overarching mission statement. These elements are presented in the accompanying diagram, alongside a set of action statements. Here, we focus on two of these action statements (partnerships and measurements) which have seen growth and evolution recently to bring them to life.

Our mission statement

"We will be a service leader in the UK providing proactive and tailored service based on customers preferences and needs. Delivering focused support to our vulnerable and disadvantaged customers that is easy to access helping them save money, access the benefits of the low carbon transition, make use of technology and receive support for wider social issues."

Understand customers' needs ⟷ Address customers' needs ⟷ Maximise value delivered

Engagement	Services	Comprehensive and up-to-date data on vulnerable situations, Net Zero barriers and wider social issues allows us to maximise customer impact.	Partnerships	Training	Measurement
Engage customers in vulnerable situations and stakeholders to understand their needs and how best to address them.	A portfolio of free services designed to address the recurring needs of customers while delivering great value for money.		A network of partners tailored to address our customers needs promptly and effectively across diverse local areas.	Train staff, partners and contractors to identify situations of vulnerability and respond to these appropriately.	Forecast and measure impact delivered by all initiatives to ensure we deliver industry-leading value in everything we do.

Partnerships

Action statement: We will develop a network of partnerships to reach and deliver support to vulnerable customers in ways that maximise our impact. We will review our partnerships to ensure that they reflect the dynamics of the communities we serve and that they can provide support whenever we are not best placed to take action.

Partnerships are a cornerstone of our approach to address consumer vulnerability. They provide valuable insights into the needs of our customers, help us promote and deliver our services, and provide inputs that feed into our impact measurement process. We segment each of our 78 partners into one of four categories:

1. **Industry partners:** Other networks and water companies we share PSR data with. We regularly exchange ideas and best practices with these partners to drive towards a unified approach to support vulnerable customers across regions and sectors.

2. **Referral partners:** Partners that we refer customers to for tailored welfare and fuel poverty support (e.g. we partner with Fire and Rescue to provide free home safety checks to vulnerable customers). We have no commercial relationships with these partners and do not fund the delivery of these referral services.

3. **Delivery partners:** The four new partners with which we have now established commercial arrangements to deliver our ambitious Fuel Poverty (FP) and Low Carbon Technology (LCT) support programmes throughout the ED2 period.

4. **Wider partners:** Partnerships, such as the Glasgow Warriors, through which we collaborate to spread awareness about our key messaging and to engage with harder-to-reach stakeholders.

Case study: The Coalition of Partners (CoP)

We established the Coalition of Partners (CoP) in 2022 to bring together a range of partner organisations whose purpose is to support people in need. This innovative network of support bodies offers a standardised approach to (i) recording customer needs and (ii) sharing referrals across organisations based on the needs that have been identified by any member of the coalition. Through a centralised function, the CoP integrates the support of all partners involved to provide a holistic support package to customers that addresses their situations of vulnerability to bring about material and lasting change.

Over the past year, we are proud to have issued referrals to 85 new customers in the Glasgow region. The most requested services include home fire safety checks and financial support, which have delivered immediate value for customers at no cost to them. The impact from this is presented alongside other welfare services on page 7. Partners currently enrolled in the trial include Scottish Fire & Rescue Service, Glasgow's Golden Generation, Change Mental Health, Food Train, British Red Cross and Age Scotland. By fostering collaboration among these partners, the CoP opens new avenues for assistance and support that otherwise remain inaccessible.

Looking forward – we are implementing a set of strategic and operational modifications to ensure the CoP evolves into an increasingly scalable model. This is underpinned by a geographical expansion as we plan to roll out the offering across our broader Scottish and Manweb regions to include more vulnerable individuals and maximise the network's impact. These improvements include:

- **The development of a referral platform :** We are developing a web-compatible referral platform. This will ensure a more intuitive tracking system and user-friendly referral process to be deployed at scale.

- **Redesign of the Data Sharing Agreement (DSA) :** The current DSA is being restructured to allow for more accessible addition of new partners. This aims to facilitate the inclusion of a wider range of organisations such as local authorities, and health and emergency response services.
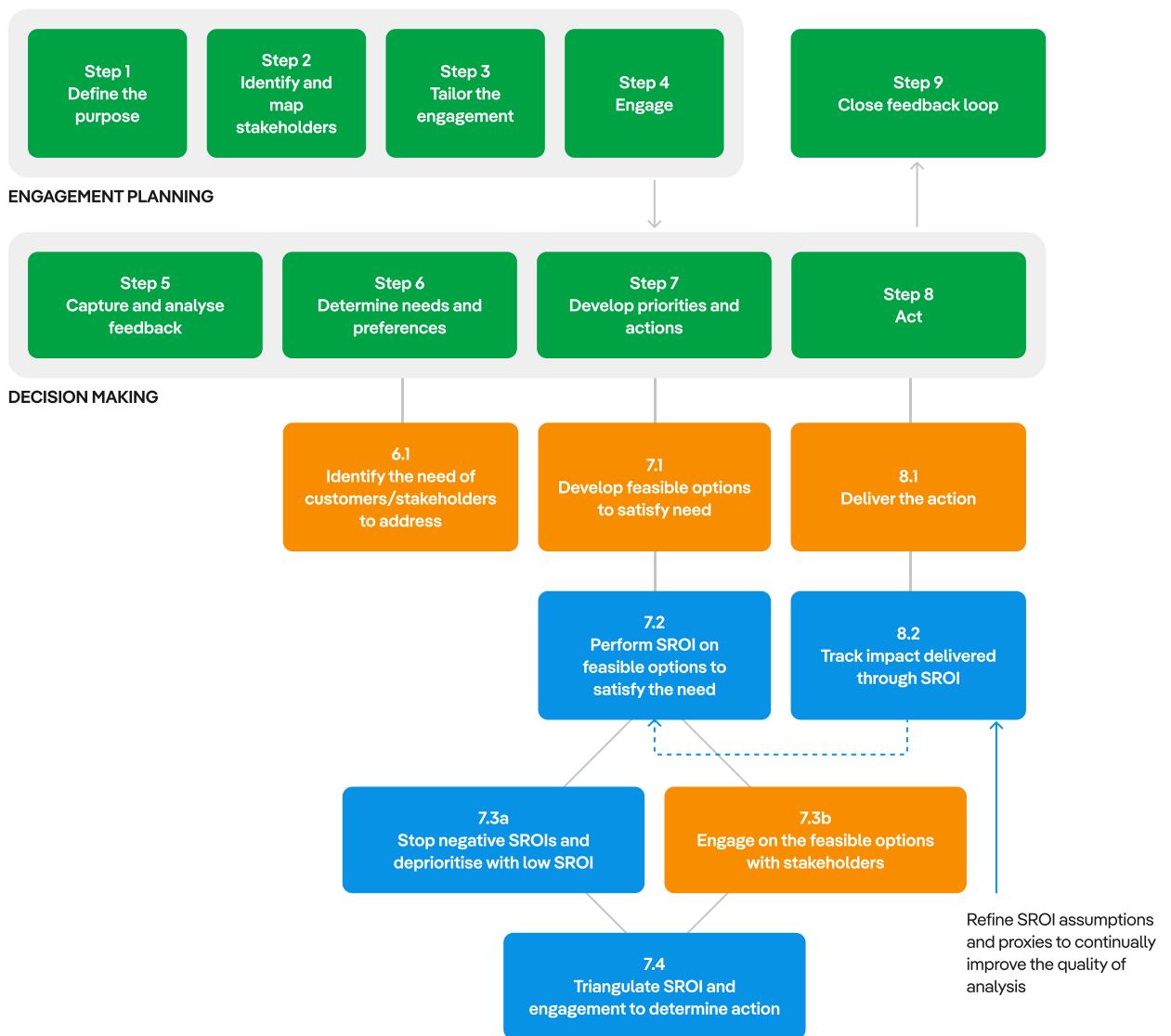
These measures ensure that the CoP evolves into a more effective and scalable model, providing comprehensive support to a broader range of individuals and fostering continuous improvement.

Measurement

Action statement: We will forecast and measure the impact delivered by our initiatives to ensure we deliver industry-leading value in everything we do.

Our impact on customers is a key metric of our success in delivering our vision. In ED1, we set up tools, processes and governance arrangements to embed social value measurement in our decision-making. We rely on various solutions, from Social Return on Investment (SROI) modelling to operational metrics such as satisfaction scores and customer feedback. The information and data we gather drive a continual feedback and improvement cycle.

How we use SROI in decision making

ENGAGEMENT PLANNING

Step 1 Define the purpose	Step 2 Identify and map stakeholders	Step 3 Tailor the engagement	Step 4 Engage

Step 9 Close feedback loop

DECISION MAKING

Step 5 Capture and analyse feedback	Step 6 Determine needs and preferences	Step 7 Develop priorities and actions	Step 8 Act

6.1 Identify the need of customers/stakeholders to address

7.1 Develop feasible options to satisfy need

8.1 Deliver the action

7.2 Perform SROI on feasible options to satisfy the need

8.2 Track impact delivered through SROI

7.3a Stop negative SROIs and deprioritise with low SROI

7.3b Engage on the feasible options with stakeholders

7.4 Triangulate SROI and engagement to determine action

Refine SROI assumptions and proxies to continually improve the quality of analysis

In the first year of ED2, this approach has been employed to shape our Fuel Poverty and Low Carbon Transition in-depth support programmes. We have implemented measures, processes and expectations that will require our partners to gather evidence from delivery to drive (i) robust SROI assessments and (ii) the identification of improvement areas and significant drivers of customer value.

Over the past year, we have expanded our processes to further emphasize the role of social value measurement throughout the ED2 period. These improvements enable us to gain a granular, robust and real-time understanding of the value delivered across our programme, all in line with industry best practice. This process expansion has included:

- **The introduction of new partner reporting processes that allow for the enhanced collection of on-the-ground data.**

- **The development of an innovative tracking and management platform.**

- **The introduction of an independent audit process for the RIIO-ED2 Consumer Vulnerability ODI.** Conducted by an independent third party with SPEN and all other DNOs, the audit aims to drive consistency and comparability across DNOs in the measurement of social value. We are proud of the key role we played at an industry level to design and set up this audit.

- **Building on the introduction of the industry-wide audit, we have set up an industry-wide sub-group of the ENA Customer Service & Vulnerability Working Group to manage and evolve key guidance that drives comparability and consistency in social value measurement across all networks.** This group demonstrates the industry's commitment to continuous improvement and the willingness to always enhance the robustness of impact measurement in a bid to improve our customers' lives.

Overview of our impact

Here, we present benefits delivered through an SROI lens in 2023/24. Over the past year, we have generated impact from two types of support services.

1. **Trials of the new in-depth support services that our delivery partners will deliver to our customers throughout the ED2 period:**

   - Delivered a net benefit (NPV) of £1,280 through an initial trial with 62 customers.

   - This value captures benefits such as financial savings and environmental benefits stemming from more efficient energy use linked with the in-depth and tailored advice provided by our customers.

2. **The delivery of wider support services offered by our referral partners to customers:**

   - Delivered £746,565 in gross benefits by referring 3,730 customers into tailored welfare and fuel poverty support.

   - This value captures benefits such as financial savings experienced by customers (e.g. resulting from bill savings from more efficient energy use or the realisation of previously unclaimed benefits), environmental benefits stemming from more efficient energy use, and mental health benefits tied to a reduction in debt levels.

Identifying and supporting customers who need extra help

Delivering prompt, targeted and high-quality support to our customers during power cuts is one of our fundamental roles as an essential service provider – this is especially prevalent in tackling consumer vulnerability. We are keenly aware of the significant detriment that customers in vulnerable situations can experience during these events, and have long embedded a wide range of systems and processes to mitigate and prevent harm.

To achieve this, we pull on two levers: (i) registering eligible households on the PSR and (ii) preparing and protecting customers from the adverse impacts of power cuts during the winter and throughout the year. Our industry leading PSR performance highlights the crucial role of data in our broader vulnerability strategy. This section provides a deep dive into these levers and reports on progress over the past year.

Reaching and registering eligible households on the PSR

Recognising the essential role in supporting customers when it's most important, we have focused relentlessly on identifying and signing up eligible customers to the PSR since the ED1 period. In doing so, we have relied on a range of channels, partners, and innovations to reach customers in an effective and targeted manner. We are proud to have now registered over 91% of all eligible households, well in excess of our Year 2 and Year 5 ED2 targets (74% and 80% respectively), in the first year of the new price control period. In tandem with this, we have also maintained the data quality of our PSR register by continuing to contact 100% of registered PSR customers to update their data at least every two years.

PSR Recruitment

To achieve an impressive 91% of eligible customers registered on the PSR we have continued to rely on a wide range of recruitment channels, tried, tested and embedded throughout the ED1 period. These range from registrations shared by suppliers via industry data flows, to identification by their teams on the ground during emergencies or via regular phone calls. In the table below, we present some of the key recruitment channels that have been utilised over the past year in a bid to balance depth (i.e. gathering targeted sign-ups from customer groups that are particularly vulnerable to power cuts in high-risk areas) with breadth (i.e. communicating with people at scale to prepare for the winter).

Recruitment channel: Regional in-person engagement

Description

Our local coordinators attended 323 events across our network area over the past year to raise awareness of the PSR.

Examples

Recovery Café engagement: Coordinators attended a local Recovery Café (a community space designed to support individuals recovering from addiction, mental health issues or other life challenges) to raise awareness of the support we offer. 100% of attendees either signed up to the PSR or renewed their information on the back of this engagement.

Recruitment channel: Awareness and communication campaigns

Description

Wide-ranging campaigns through which information is disseminated at scale in our network area to raise PSR awareness and encourage registration.

Examples

Winter Preparedness Campaign: Our annual winter campaign includes the objective to increase awareness of the PSR. We are pleased to report on the overall success of last year's campaign, as it achieved 126m impressions – an astounding 1,160% increase over the 10m impression target.

Leaflet drops: Our Security of Supplies leaflet provides advice on what to do in a power cut, in addition to what vulnerable and commercial customers should do to prepare for Emergency Energy Demand Scenarios. It is produced in both English and Welsh and reaches 3.5 million customers every year.

Recruitment channel: Partnerships

Description

We leverage our valued partnerships to drive PSR awareness and uptake. All four categories of our partners have a role to play in this – some examples are highlighted on the right.

Examples

PSR data sharing with water companies and GDNs: Over the past year, more than 35,875 PSR updates have been shared with us under new industry flows with water companies, while 1,976 records have been shared with GDNs. These industry partnerships ensure an encompassing approach to PSR recruitment.

Glasgow Warriors: We run regular coffee mornings in the Glasgow Warrior's hospitality suite. These are catered towards individuals in vulnerable circumstances and allow for us to spend 1-2-1 time with them, as well as providing support with referrals.

Wrexham AFC: Through our partnership with Wrexham FC, we have been provided with access to space to promote PSR. This regularly takes place on game days, coffee mornings or other events to ensure we are raising PSR awareness in the community.

The Royal Hospital for Children Glasgow: On a bi-annual basis, we employ space in the hospital foyer and charity shop to promote the PSR and additional services our partners offer.

> Through our partnership with SP Energy Networks, we have been able to support their Priority Service Register and the additional support that they can provide through our collaboration with our Powerchair team on being winter-ready.
>
> The community outreach event hosted at Wrexham AFC which was attended by various Councillors, Parish Councillors & the Deputy Mayor of Wrexham as well as organisations such as North Wales Fire & Rescue, Warm Wales, and Groundwork North Wales was a fantastic opportunity to allow SPEN to engage directly with their community and highlight the importance of the Priority Services Register and the additional services they offer their customers.
>
> *Jamie Edwards, Head of Community at Wrexham AFC*

PSR data cleanse

Holding up-to-date, cleansed, and validated PSR data enables us to understand customer needs in real time. This enables us to better target and serve our vulnerable customers. Our approach to cleansing PSR data relies on continuous communications with customers (i.e. through our PSR recruitment channels) and regular targeted data cleansing.
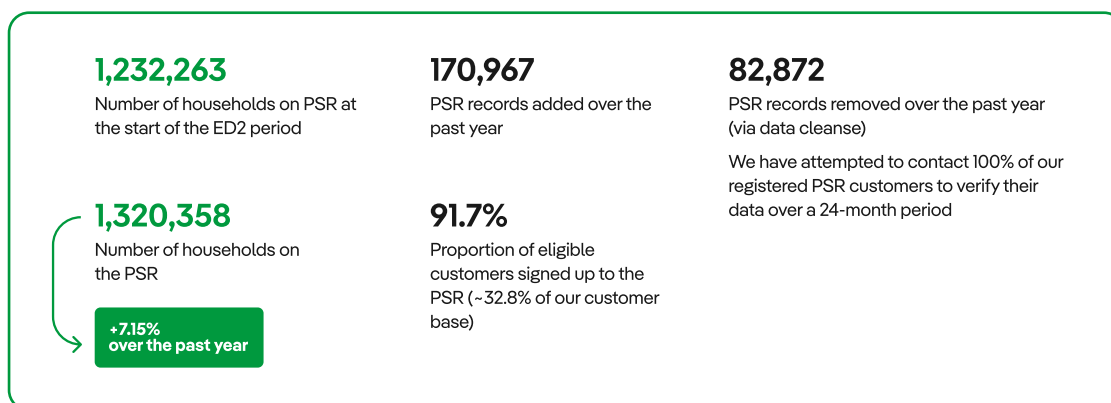
Case study: A focus on PSR data resilience

Driven by the importance of holding high-quality PSR data, we have invested in implementing an advanced data cleansing system. Our innovative MARS Project carries two high-level aims:

- **To clean and enhance PSR data** for instance cleaning existing data, appending email and phone numbers when absent.
- **To develop a data cleansing system** that engages with customers to assess, collate, and report on individual characteristics. This will be achieved through approaching customers digitally to gather information on any vulnerabilities, collating an objective measure (i.e. a resilience rating) including severity, prioritising services in proportion to consumer needs and, via the provision of comprehensive reports, developing our understanding and enabling us to improve our service offerings.

The output of this investment is a validated PSR dataset and cleansing system that also holds the capability to identify additional customer needs. This will help us to continuously improve the support we offer to vulnerable customers.

To date, we have developed a consumer vulnerability assessment (pictured) that is to be piloted with 20,000 customers. Through the pilot, customers will be sent an email asking them to complete an online questionnaire that covers PSR codes, specific questions to trigger present services offered, contact preferences, and initial questions on LCT capacity. This is a critical early step in this process, which we anticipate will provide a more holistic understanding of and approach to addressing the needs of our vulnerable customers.

1,232,263
Number of households on PSR at the start of the ED2 period

170,967
PSR records added over the past year

82,872
PSR records removed over the past year (via data cleanse)

We have attempted to contact 100% of our registered PSR customers to verify their data over a 24-month period

1,320,358
Number of households on the PSR

+7.15%
over the past year

91.7%
Proportion of eligible customers signed up to the PSR (~32.8% of our customer base)

Preparing customers for power cuts and protecting them from negative impacts

Our vulnerable customers have made it clear that power cuts cause them stress and anxiety, and can cause a real threat to their safety and wellbeing. We therefore remain steadfast in our longstanding approach to helping customers manage these challenges by providing quick, clear and accurate information before, during and after power cuts. In the first year of ED2, we had a touchpoint with 100% of our 3.5 million customers to prepare them for power cuts and protect them from any negative associated impacts.

How we prepare customers for power cuts and protect them from any negative impacts

Here, we outline the following through the lens of our winter preparedness plans: how we prepare customers for power cuts (including the plans we had in place before the winter period), the extra support we provide during power cuts and the actions we take to quickly resolve them.

Going into the winter period, we remained steadfast in our plan to provide prompt, clear and efficient communications with our customers before power cuts – providing necessary support infrastructure ahead of time is a core focus of our vulnerability approach. This has been defined in close collaboration with customers and stakeholders, who expressed the importance of proactive communications in minimising stress levels and enabling relevant plans to be put in place. In practice, we have continued to focus on offering our portfolio of communication services (outlined below) to provide clarity and reassurance to help our customers prepare for power cuts. Building on our approach, we take the following actions to prepare customers before storms and for the winter period:

- **Circulate a winter preparedness mailer with our 3.5 million customers** including clear information on what to do during a power cut and shares relevant resources to turn to in case extra support is needed. This also provides details on how to sign up to the PSR, as well as tips on how to prepare for storms and severe weather events.

- **Utilise a range of social media channels to reach large audiences with our focus message** – *'If your power is out then so are we, 24/7'*. Through this, 116 media articles yielded over 119 million media impressions and engagement across seven partners generated 5.7 million impressions.

- **Engage in sports partnerships** (e.g. with Glasgow Warriors and Wrexham FC) to promote the 105 emergency helpline number and PSR. Over the past year, these partnerships have yielded more than 374,000 impressions across a range of social channels.

- **Collaborate with Local Authority Emergency Planning Officers** to inform them of adverse weather events likely to affect the most vulnerable people in their respective communities. These communications also provide PSR details and allow for extra provisions and checks on vulnerable customers if/as relevant. This valuable exercise enables power cut contingency planning for some of our most vulnerable customers.

- **Distribute winter packs to support our customers** who serve to benefit. Over the past year, our social obligations team distributed these to 465 of our customers.

- **Train staff across our business** to ensure our employees are effectively utilised during storms.

- **Provide an annual update of postcodes to the Energy Networks Association** in preparation for rota disconnections, should this be required.

In addition to the above, our Winter Preparedness Campaign is in place to raise awareness of the 105 emergency number for all households in our license area. This is covered in more detail via a case study on page 13.

During storms, our focus shifts to proactive support via prompt, frequent and accurate communication with customers and, where needed, support on the ground. This includes a 24/7 helpline, real-time SMS updates and the provision of generators. The following table presents an overview of how we leveraged communication and support services over the past year to support vulnerable customers during power cuts:

Customer touch points during power cuts

Customer communications during power cuts	1,105,369 touch points
Website accessibility	803,119 visitors to the SPEN website
Voice to landline updates	508,657 updates sent
IVR messaging	83,514 messages received
Dedicated PSR line	19,205 calls made
Hot food and accommodation	788 hot meal vouchers provided 124 hotel stays covered
Generator provision	288 generators deployed

In line with our embedded post power-cut review process, after storms we strive to understand the impact of each incident on our communities – especially those characterised by a high concentration of vulnerability situation.

Last year, the Dumfries area was identified as having one of the highest incidences of vulnerability in our network area via VEST tool analysis. On the back of this, we held a community day to educate the residents on preparing for and keeping safe in a power cut. Our Social Obligations Team delivered invitation leaflets to residents ahead of time, hired the Town Hall for the event with refreshments and also visited the homes of particularly vulnerable customers on the day to ensure they were included in any messaging. 80 households received education on our services, the 105 number and safety precautions to take in power cuts. In addition, 11 new customers signed up to the PSR on the back of this event. Going forward, we intend to identify more communities using the VEST tool and deliver additional events.

Case study: Our Winter Preparedness Campaign

Our annual Winter Preparedness Campaign carries the objective to raise awareness of the 105 emergency number in our network area and increase PSR awareness levels amongst vulnerable eligible groups. As extreme weather is becoming more prevalent, it is more important than ever that our communications clearly and empathetically explain how customers, especially those who are most at risk, can prepare for potential power cuts.

Focusing on our PSR customers – it is clear that those in situations of vulnerability are most at risk during power cuts as they may face a wide range of accessibility needs. The messaging for this group therefore focuses on the extra support we offer to customers who need it, awareness of PSR registration and the 105 hotline. Examples of the way we engaged are:

- **'You're a Priority' video series:**
  We partnered with leading disability activist, Lucy Edwards, to create a video series to raise awareness of the PSR. As part of this collaboration, we drafted a videography brief, scripts, a paid social plan for both Lucy and our own channels as well as a media partnership release.

- **SignLive partnership:**
  We launched our partnership with SignLive through a multi-channel approach. We drafted a media release and organised supporting photography with representatives of SignLive and our customer service team. This release was issued to key media contacts and secured coverage on the likes of Mersey Reporter, Paisley Daily Express and Living with Disability.

- **Graeme Sutherland's PSR ambassador content:**
  We partnered with Alzheimer's and dementia activist, Graeme Sutherland, to create social content raising awareness of our PSR and support available for carers. Graeme shared important advice to his followers, including tips on dementia support which is offered in partnership with Alzheimer Scotland.

We are pleased to report on the overall success of last year's campaign, as it achieved 126m impressions – an astounding 1,160% increase over the 10m impression target.

Lessons learned and plans for next year

In the accompanying table, we present our lessons learned and subsequent plans for next year's campaign. We will embed these to strengthen our existing approach to provide prompt, clear and efficient communications with our customers before power cuts:

Before, during or after storms	Lessons learned	Plans for next year
Before Storms	Sporting partnerships with Glasgow Warriors and AFC Wrexham played a huge role in reaching communities and delivering our winter safety messaging over the past year. These campaigns combined resulted in over 350,000 impressions for content promoting the 105 number and PSR.	We plan on further leveraging this partnership category and growing awareness through this space. Early engagement and maximising partnerships with organisations close to the hearts of our communities will play a key role in our plans going forward.
	Social media was utilised heavily to reach large audiences with our focus messages. In particular, we saw positive results with SignLive – a deaf-owned organisation that provides video relay and remote interpreting for deaf and hard-of-hearing individuals – which secured over 295,000 impressions. The strong relationships we built with SignLive's communications team opened up additional communications avenues via media coverage with the likes of the Mersey Reporter, Paisley Daily Express and Living with Disability.	We plan on proactively leveraging the networks of our partners to create additional communications activities targeting PSR audiences that span beyond our initial reach.
During Storms	Our work with the British Red Cross (BRC) opened the door for us to provide better coverage and support of our vulnerable customers during adverse weather events. As a whole, this adds an additional presence on our behalf during power cuts.	We will continue to develop and grow this partnership with the BRC to expand our presence (i.e. especially in the most at-risk areas) and support vulnerable customers during adverse weather events.
	During storms, we inform emergency planning officers in local councils of changes to storm levels and ensure they hold up-to-date contact information for PSR residents in their regions. Over the past year, we had instances in which information pulled from storm reports did not precisely match with local council areas on a per-postcode basis.	We have already developed an internal database that matches council areas to postcodes. This will allow for more efficient support provision on a per-postcode basis in all of the council areas we cover.
After Storms	Last year, we held a community day with residents in Dumfries (VEST tool analysis identified this area as having one of the highest incidences of vulnerability in our network). In this event, 80 households received education on our services, the 105 number and safety precautions to take in power cuts, and 11 new customers signed up to the PSR.	Going forward, we intend to identify more communities with high incidences of vulnerability during storms using the VEST tool and to deliver additional community events on the back of this initial success.

Improving our customers' welfare

In recent years industry, market and wider societal dynamics have posed serious challenges to our vulnerable customers. We believe that going above and beyond to enhance our customers' welfare is central to our role as an essential service provider. Therefore, we remain committed to our longstanding approach – we proactively identify and tackle fuel poverty and offer additional support to address welfare and latent social issues (e.g. loneliness) whenever we identify them. In this section, we cover the work we do to tackle fuel poverty and enhance customer welfare.

Tackling fuel poverty

Over the past year, we set the foundation to achieve our ambition of supporting 60,000 customers with in-depth targeted support throughout the ED2 period. We established commercial contracts with four new delivery partners and set up tools, processes and governance arrangements that will allow us to track and measure the impact of our programme as a way of delivering maximum value and, ultimately, drive lasting benefits for our vulnerable customers. These improvements were put to the test through an initial trial with 62 customers, which delivered immediate social impact and high levels of customer satisfaction. At the same time, we offered referrals to wider support services focused on tackling fuel poverty and improving customers' welfare; our referrals ensured that customers were looked after while we implemented a step-change in our partnership model.

Our approach

We estimate that over 620,000 households in our network area are living in fuel poverty. As an essential service provider delivering energy to their premises, we have a significant role to play in mitigating the negative impact of fuel poverty and addressing its root causes. Our RIIO-ED2 target to directly support 60,000 fuel poor customers through four key services – tariff switching support, income maximisation advice, debt advice and independent advice on energy efficiency measures – is firmly underway.

Our approach to tackling fuel poverty

Identify fuel poor customers through the following channels

Our teams and partners identifying fuel poverty

E.g. Our response identifying signs of fuel poverty via customer calls

Third party vulnerability data sources

E.g. National Fuel Poverty statistics

Deliver in-depth targeted support to lift people out of fuel poverty

E.g. Debt advice via Hope 4 U Limited.

Refer relevant individuals into existing streams of support

E.g. Low carbon transition advice via Changeworks.

Deliver light-touch support to prevent households from falling into fuel poverty

E.g. LCT guides.

Our fuel poverty partnership model

Our partnership model aligns with our ambition to provide holistic support for all customers who need extra help. We have focused on enabling our partnerships to scale in line with our ED2 commitment in this area. Key achievements over the past year include:

- **Established four new commercial contracts to deliver our in-depth fuel poverty programme that will reach over 60,000 customers throughout ED2.**

  - These contracts were the result of close collaboration with the third sector. We understood that the scale and scope of our requirements would pose significant challenges to their resourcing and training efforts if these were tendered over short-term contracts. We therefore held two rounds of procurement, which were open to all relevant organisations in our network area, based on long-term contracts which allow our partners to invest and grow with us while delivering quality and tailored support to customers.

- **We designed the underlying tools, systems and processes that will support the delivery of our new ambitious fuel poverty support targets (i.e. 60,000 customers helped over ED2).**

  - For example, designed a bespoke process through which our Vulnerability Team will have weekly performance meetings with key stakeholders from partner organisations to discuss progress, successes and any challenges faced. These discussions will include delivery assessments through the lens of service volumes and CSAT targets, with the aim of collaboratively delivering better value to customers.

- **We effectively leveraged ED1 relationships to connect our customers with tailored and targeted in-depth support via our referral partners, ensuring that customers' needs were addressed while we established our ED2 fuel poverty programme.**

Focus on our fuel poverty support

The core of our ED2 fuel poverty programme will orbit around four areas of support:

- **Tariff switching support:** Independent advice on the best energy tariff and practical help to switch.

- **Energy efficiency measures:** Independent energy efficiency advice on reducing costs and keeping warm alongside practical actions and installations.

- **Income maximisation:** Independent benefit checks in customers' homes or over the phone to ensure individuals are maximising the benefit streams that are available to them.

- **Debt advice:** Independent advice on debt along with practical help with planning and support.
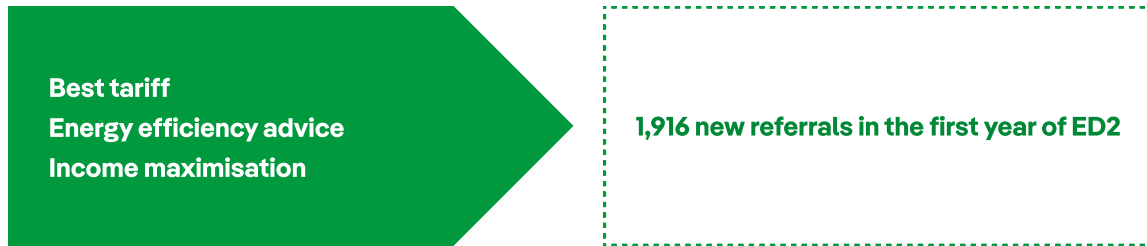
While our four new delivery partners will tailor this help to the individual circumstances of each customer, we have decided to focus our effort on key needs. The selection of these focus areas was informed by by (i) engagement with customers and stakeholders during the development of our ED2 Vulnerability Strategy and (ii) ED1 social value measurement results to identify the most in-demand and valuable support we can offer.

We successfully tested these services via a small-scale trial with 62 customers over the past year. The learnings extracted have shaped the final commercial contracts that are now in place and will support tens of thousands within the next year.

We have also continued to offer referrals to partners that could support our customers with tailored support aimed at tackling their situation of fuel poverty. While we do not fund the delivery of these services, our customers have received great value as we worked to establish our ED2 fuel poverty programme.

The significant role that our referral partners played for customers over the past year, is exemplified by our collaboration with the Local Area Energy Advice Partnerships (LEAP).

Fuel poverty referrals over the past year

Best tariff
Energy efficiency advice
Income maximisation

1,916 new referrals in the first year of ED2

Case study: LEAP

Through Local Area Energy Advice Partnership (LEAP) – an award-winning community-based approach – we offer our fuel poor customers the following services: (i) the installation of energy efficiency measures, (ii) funding the replacement of white goods with those that are more energy efficient and (iii) income maximisation advice. Over the past year, 1,880 new referrals were made via this partnership alone.

LEAP engages with our customers via scheduled home visits or telephone appointments. This initial touchpoint is geared towards answering any questions the customer may have about their current bills and energy usage, as well as the provision of advice on how these can be reduced. This is complemented by a focus on ensuring customer homes are as warm and energy efficient as possible through the installation of small energy efficiency measures (e.g. low energy lighting and draught excluders). Rounding out this service, income maximisation checks are offered to customers to ensure they are receiving all benefits they may be entitled to, in addition to carrying out admin-related tasks in regard to this for customer convenience.

Enhancing customer welfare

Building on our longstanding ED1 track record, and supported by our customers and stakeholders, we have referred 1,814 customers into targeted welfare support. This has served to address customers' immediate needs and tackle broader social issues. While not part of our core regulatory targets, we strongly believe it is our role to respond to pressing customer needs and emergencies when we identify them. In addition, we recognise this as an enabler to ensure customers are better placed to engage with and benefit from more specialised FP and LCT support services.

The support we are delivering to customers

The welfare services we offer to customers cover a range of circumstances and, importantly, are provided via referrals to organisations that have existing funding streams in place. Hence, we provide this support at no additional cost to our customer base.

The services provided via these partnerships are tied to a needs-based identification tracking process (linked to customer requirements) and include home fire safety checks, befriending services, carers support, dementia help and the provision of hot meals. Here, we highlight two of our service offerings to illustrate the welfare support we deliver to our vulnerable customers.

- **Fire home safety checks**
  Through our network-wide partnership with Fire and Rescue, we arrange for local fire services to conduct thorough checks of customer households to ensure operational fire alarms and fire safety equipment are in place. In addition, a check is conducted in each home for any potential fire risks alongside the preparation of fire plans to ensure customers know how to react to any potential home fires.

- **Befriending services**
  Through our partnerships with local service providers across our network area, we offer a befriending service to any customers over 65 who suffer from social isolation. Individuals are matched with befrienders who provide weekly or bi-weekly phone services to provide companionship and a vital link to the outside world.

These services are designed to mitigate emergency needs that may otherwise inhibit our customers from benefitting from other offerings. Hence, providing these services facilitates the eventual delivery of FP and LCT support – once these emergency needs are alleviated, it opens the door for us to move forward and deliver more in-depth services.

Fire home safety checks

Befriending services

Carers support

Dementia help

Help in a power cut

Friendship & meals

1,814 new referrals to welfare support in the first year of ED2

Supporting the transition to Low Carbon Technologies

Supporting the transition to LCTs is a new, dynamic and quickly evolving area. As an electricity distribution network, we play a key role in the decarbonisation of our communities and hold the responsibility to ensure that all customers can participate and benefit from the energy transition. While we started tackling this in ED1, the scale of our ambition in ED2 has required a step change in our partnerships, processes and governance which have delivered in the first year of the ED2 period. In this section, we outline our understanding of the risk of being left behind and our subsequent support approach.

Over the past year, we established the foundations of an ambitious programme that will support at least 40,000 vulnerable customers in joining the energy system transition. Our efforts have been twofold: on one hand, continuing to refine our understanding of the blockers faced by customers, while on the other establishing new partnerships to deliver innovative in-depth services and handholding for thousands across our region. At the same time, we have developed new commercial partnerships with expert partners to establish a programme of in-depth LCT support while leveraging staff training, accessible guidance and referrals to meet our client's immediate needs.

Our understanding of the risk of being left behind

To truly leverage the benefits and opportunities presented by the energy transition, customers must adopt new technologies, undertake new behaviours and engage with organisations that may be new to them. Throughout ED1 and into the present, a key focus has been on identifying the socio-economic trends experienced by customers in our region. Our research has shone a crucial light on the potential blockers to LCT uptake that we aim to contend with through ED2, ensuring that those in vulnerable situations are not precluded from the benefits of the shift toward Net Zero. The table below provides an overview of some of these key blockers.

Trend	Description	Blockers for LCT uptake
Ageing population	Increasingly ageing population in Scotland. About 19.3% is of 'pensionable age', forecast to grow to 22.9% by 2043.	• Less awareness and understanding of new technology, and how to effectively manage and optimize LCT use. • Financial constraints limit pensioner's ability to invest in new technologies. • More risk-aversion to welcoming new technological investment.
Inability to engage with the energy market	The UK energy market is characterised by uneven levels of understanding and participation from different demographics. Stronger correlation between wealthy groups taking advantage of new technology.	• Digitalisation of increasingly complex information means vulnerable customers face additional hardship in navigating LCT options. • The most competitive tariffs can be hard to understand, implying a risk of missing out for vulnerable groups. • Onset of multiple LCTs simultaneously risks exacerbating the inability of vulnerable groups to engage with uptake.

Trend	Description	Blockers for LCT uptake
More homes, smaller households, dispersed families	The number of households in England is forecast to increase to 28 million by 2039, with growth averaging to 210,000 households a year. The number of people per household is set to decrease, with more people living by themselves.	• Smaller households means fewer opportunities to share resources, and thus potential financial barriers to LCT uptake. • Financial barriers are worsened with higher per capita costs of LCT installation for smaller households, lowering their attractiveness. • More dispersed housing increases the demand for infrastructure to support LCT uptake.
Financial uncertainty and poverty	Economic growth has slowed due to a range of factors. Household debt as a percentage of income is forecast to continue to grow, adding to the pressure of household finances.	• Households facing financial hardship will and should prioritise immediate needs, leaving little room for beneficial long-term LCT uptake which carries high upfront costs. • Those in financial hardship often have restricted access to credit options, lowering access to financing plans that would facilitate LCT purchases.
More private renters	Private renter numbers are growing, and there will be more private renters than people in social housing.	• There is a misalignment of incentives, as the cost of LCT installation falls to the landlord and the benefit of reduced energy costs is enjoyed by tenants. • With shorter lease agreements, there is little tenant willingness to install energy-efficient measures and LCTs. • Landlords often prioritise minimising expenses than investing in long-term property upgrades.

Developing a baseline of information: the 'risk of being left behind index'

With a solid grasp of the main challenges customers face in transitioning to Net Zero, we aimed to apply this research directly to our license area. Our first step was collating bespoke data to examine how our region experiences vulnerabilities. We collaborated with a market research agency, engaging over 2,500 customers with a tailor-made survey to explore the likelihood of a customer's adoption of a range of key energy transition technologies such as electrified heat, microgeneration, battery systems and demand-side-response events.

Information was gathered on the technologies and behaviours a customer considered unlikely to adopt, as well as the personal characteristics of each customer. Using cutting edge small area estimation techniques, we computed the 'risk of being left behind index', a resource which assigns a statistical link between individual customer characteristics. For example, between inputs such as PSR need code, tenure, or housing information, and outcomes such as reliance on universal benefits, health status, and the risk of being left behind in the energy transition. In this context, the risk of being left behind is defined as the degree of likelihood that customers in a local community or neighbourhood will not adopt the technologies and behaviours necessary to participate in and benefit from the transition in the foreseeable future.

Case study: Defining the risk of being left behind in the energy system transition

Having established this strong baseline of information, we took our understanding of our region's needs a step further with the development of our VEST tool, which, as discussed earlier in the submission, provides invaluable additional insights into the level of risk our customers face of being left behind. The tool complements our innovative 'risk of being left behind' index with additional functionalities and joins this with Fuel Poverty and PSR data to provide a comprehensive measure of vulnerability that focuses on all dimensions most relevant to our role as an electricity distribution network. A leading example of how the VEST tool bolsters the index with enhanced functionalities is offered by the clustering of areas and neighbourhoods that face a similar mix of blockers to the transition. By splitting our license area into key representative sets of areas ('LSOAs') and utilising geospatial mapping techniques with our survey data, our teams are able to use the VEST tool to derive further insights into, and visualise, how risk is spread across our community. The tool then uses an advanced 'unsupervised algorithm' to analyse the drivers of risk across each LSOA, and groups those that share similar characteristics. This key feature has helped us build a more developed understanding of what blockers feature consistently in certain regions, allowing us to prepare more tailored, effective, and ultimately efficient strategies for addressing LCT uptake for those most vulnerable groups in our community.

Features of the VEST tool

Colour-coded LSOAs by level of risk	Algorithmic grouping of LSOAs by drivers of risk	Spatial analysis of data
Key areas of concern can be identified	Pockets of concern with similar characteristics can be identified	Relationship of risk in an area to the surrounding areas can be identified

We have and will continue to utilise insights offered by our 'risk of being left behind index' and Vest tool to:

- Identify potential barriers that customers face, and dedicate resources, advice and support to local projects in an efficient manner.
- Shape the development of local partnerships to address key blockers locally.
- Develop collaborative groups of organisations to tackle specific combinations of blockers.
- Develop products and services to help customers maximise possible benefits from the energy system.

Our approach to supporting our customers

In the first year of ED2, we have taken significant steps to refine our approach to supporting vulnerable customers in their transition towards Net Zero. Our approach is built on three self-reinforcing pillars: (i) we identify at-risk customers and understand the blockers they face, then offering (ii) light touch support, and (iii) in-depth support to facilitate their journey to Net Zero, depending on their specific needs and circumstances. The new commercial contracts set up with expert partners that will handhold our customers in the journey to Net Zero place us on track to meet our ambition of supporting 40,000 customers throughout the ED2 period.

Identifying customers at risk of being left behind

- Leveraging insights generated with our 'Risk of being left behind' index and the VEST tool, we have been able to better understand our highest risk customer groups.
- Identifying common blockers faced by at-risk groups, we have developed a localised understanding of the barriers experienced by different groups that is shaping our in-depth support programme, our partnerships with local communities and organisations.

Supporting customers with light-touch support and existing advice

- We have referred our customers to a range of our accessible, freely available resources to help encourage widespread understanding of how LCTs can benefit them and clarity on what funding and support is available. For example, our Low Carbon Technology guides, recently updated this June, provide a simple overview of the most popular low-carbon technologies to help customers discover new opportunities and make informed decisions on their energy use:
  - 14 LCT guides are available, covering key technologies such as air source heat pumps, battery storage, solar PV and smart meters. Each guide explains the technology, how it works, key information to consider before adopting it as well as an overview of the technology costs and funding availability. Over the past year, these guides have garnered 731 views.
  - Three further separate funding guides, covering the Boiler Upgrade Scheme (BUS), Smart Export Guarantee (SEG), and funding around charging infrastructure and EV purchases, are also available and signposted to our stakeholders when necessary.
- We offer referral services at no additional cost to our customer base. These are presented in detail in pages 16-17 and, in addition to addressing fuel poverty, are also geared towards facilitating the transition to Net Zero (e.g. via the provision of energy efficiency advice).
- At community engagement events, our teams provide advice and deliver free technology measures to start customers on their transition journey.
  - These include, for example, SMART Bulbs along with advice and guidance on how to benefit from these.
  - Bulbs have been distributed to ensure that those vulnerable in the event of an outage can have a continued light source, free of charge.
  - Targeting vulnerable customers, between April 2023 and March 2024 we distributed 621 SMART Bulbs at community events.

- The team has been preparing to support customers first hand in their transition to Net Zero by growing their skillset and knowledge base, for example completing a City & Guilds accredited LCT course.

- As part of this preparation and evidencing the Social Obligations team's commitment to delivering tailored LCT advice to those at risk of being left behind, five team members recently completed a City and Guilds qualification for Energy Efficiency Advice and Low Carbon Technology.

- Combined with the industry-leading resources we have at our disposal, the insights gained from these qualifications put us in an even stronger position to continue delivering valuable advice and support, ensuring our customers can derive the greatest benefit they can from the energy transition.

> "The knowledge and expertise obtained through the City & Guilds accredited NEA Energy LCT Course allows us to have valued discussions with our customers in relation to LCT types, availability, and sources of funding available. Most importantly it has allowed us to better support our customers and guide them through any questions or queries they have in regard to LCT towards lowering their carbon footprint and building resilience to climate change"
>
> – SPEN Social Obligations team member

Providing in-depth support to facilitate customers' journeys to Net Zero

Over the past year, we set up new commercial contracts with expert partners that will deliver in-depth and targeted services to handhold customers in their journey to Net Zero. Supporting 40,000 over the ED2 period, these new delivery partners will form the backbone of our LCT programme. While tailoring the support to each customers' unique circumstances, our new partners will offer the three following services, selected in partnership with customers and stakeholders as part of our ED2 business plan:

- **Advice line:** We operate an advice line for customers to provide assistance with the following – LCT costs and available funding, advice on new technologies that are available in the market and the benefits these technologies can deliver.

- **Personal planning:** We offer a planning service for customers who have gone through our advice line, and require a tailored plan to be developed for them on the back of the LCT advice they have been given.

- **Client journey:** We offer a handholding service for our customers who require end-to-end support from when their personal plan is curated to the deployment of the new LCT.

Our progress and performance over the past year

Summarising our performance over the first year of ED2

Metric	Year 1		Year 2 target	
	SPM	SPD	SPM	SPD
PSR Reach	89.9%	93.3%	74.0%	74.0%
Social value of Fuel Poverty Services Delivered (NPV)	£412.92	£867.13	£2,456,500.00	£3,243,500.00
Social value of Low Carbon Transition Services Delivered (NPV)	£0.00	£0.00	£844,500.00	£1,115,500.00
Average Fuel Poverty Customer Satisfaction Survey score	9.5	9.38	9/10	9/10
Average Low Carbon Transition Customer Satisfaction Survey score	N/A	N/A	9/10	9/10

Our ongoing performance reflected in Table 4 has been assessed as part of the Vulnerability ODI Assessment. On the back of this assessment, we are pleased to confirm alignment with the agreed upon reporting guidelines (relevant to PSR reach) for Y1 of our RIIO-ED2 Vulnerability ODI.

RRE	Expectations	Year 1
Frequency of PSR Customer data cleanse	Licensee has attempted to contact all PSR Customers to verify their data	100.0%
CSS score for PSR customers who have experienced a power cut	9.01 target	9.01
The volume of Fuel Poverty Services Delivered	60,000	62
The volume of Low Carbon Transition Services Delivered	40,000	0

The above reflects our focus on the PSR in year 1, while we established commercial contracts with key delivery partners to deliver our ED2 FP and LCT targets.

Progress in delivering our vulnerability strategy commitments

Vulnerability strategy commitment	Description	Expected outcome/ benefit	Key milestones for implementing commitment	RAG status	Status update
Reaching those who need help	We will register 80% of customers across every common needs code for PSR Registration by 2028 based on nationally available data.	Comprehensive coverage of eligible customers across common need codes will ensure we can support them effectively during emergencies and business-as-usual scenarios.	**Ongoing process** To meet this commitment we will continue to deliver our PSR registration process presented in more detail on page 9.		**Ongoing - on track** The commitment is on track to being fully delivered within the ED2 period. We are making significant progress in closing the gaps identified in our ED2 Vulnerability Strategy document. In particular, there has been considerable growth in PSR reach within the following needs codes: families with children under five, individuals of pensionable age, and those unable to communicate in English. To illustrate, the PSR reach for families with children under five has increased to 60.3% (SPM) and 60.1% (SPD) compared to the 31% referenced in our ED2 Vulnerability Strategy. Beyond solid performance across all need codes, our PSR registration process has proved efficient in registering 91.7% of all eligible customers across our region. By continuing to implement this tried-and-tested process we are confident that our commitment will be met within the RIIO-ED2 period.
Broadening PSR to capture wider vulnerability	We will broaden our view of vulnerability, capturing needs broader than common utility codes, and building these into our service offerings and coalition partnership model.	Establishing a broader understanding of the situations of vulnerability that impact our customers (beyond the PSR need codes) will allow us to better address their needs during power cuts, tackle situations of fuel poverty and remove blockers they face to the energy system transition.	**Milestone #1 - Define a way to measure the risk of being left behind** Determine a way to measure and quantify the risk of being left behind faced by customers in a given community and develop a granular assessment of this risk across our network areas.		**Complete** We defined an approach to measure the risk of being left behind by linking direct customer research with publicly available datasets that capture situations of disadvantage (e.g. low qualifications, rural, low income). We then built a 'risk of being left behind' index based on this approach. This was achieved via the NIA-funded VEST innovation project.
			Milestone #2 - Create a comprehensive measure of vulnerability Integrate the 'risk of being left behind' index along with existing measurements of Fuel Poverty and PSR concentration to develop a granular measurement of vulnerability for each community across our license areas that focuses on the three dimensions of vulnerability addressed by our RIIO-ED2 Strategy.		**Complete** We developed an approach to merge (i) Fuel Poverty data, (ii) PSR data and (iii) the novel 'risk of being left behind index' to produce a first-of-a-kind 'unified' view of vulnerability. This was achieved via the NIA-funded VEST innovation project.

			Milestone #3 - Explore the addition of a layer of additional datasets Explore the opportunity to layer additional datasets to complete the unified view of vulnerability defined in Milestone #2. These will include (i) Disruptive technology data (e.g. EV uptake), (ii) Smart Metering data, and (iii) Bespoke/ qualitative customer needs.		Not started - on track Tests of additional data sources are scheduled to start in Y2 - this milestone will be achieved within the ED2 period.
			Milestone #4 - Implement additional data layers Implement the data layers that are deemed to carry value and lead to an overall improvement of service delivery (as defined in delivering Milestone #3). Overlay the delivery of support from in-depth partners, referral partners and CoP partners to drive the development of our partnerships/ service strategy and guide our teams in linking customers to targeted support.		Not started - on track The implementation of additional data layers will be based on the tests scheduled to start in Y2 - this milestone will be achieved within the ED2 period.
Understanding customer needs in a power cut	We will support customers in a number of ways during a power cut and capture their individual needs through our contact channels with no less than 99% of needs being met.	Offering a range of flexible power cut support services ensures that we can address customers' individual needs flexibly during emergencies. At the same time, capturing and recording their needs allows us to gather a better understanding of their individual circumstances and address these proactively as required in the future.	Ongoing process #1 - Deliver power cut support services Support vulnerable customers in a power cut where a need is identified with a range of services deployed to address each customer's specific situation.		Ongoing - on track Over the past year we have continued to offer tailored services to address the individual needs of vulnerable customers during power cuts including proactive contact, support packs, generators, hot food and drinks among many others - please refer to page 12 for further detail.
			Ongoing process #2 - Capture customers' needs via a needs tracker Capture all needs identified through our contact processes, delivering on them and updating our customer records to ensure we can act proactively in the future.		Ongoing - on track Over the past year we have continued to capture customers' needs on the needs tracker first developed in 2020, which we integrated into our new Salesforce CRM platform in 2023. In addition, we regularly and proactively address these needs as they arise.
Keeping our records updated	We will contact 100% of all our vulnerable customers every 2 years, achieving a minimum of 60% fully validated data.	Frequent customer contact will drive enhanced data quality that is essential to support customers effectively during emergencies and business-as-usual situations.	"Ongoing process - Proactively contact and update PSR customer data Employ a range of proactive and reactive channels to contact and update the information of all PSR customers on the register on an ongoing basis.		Ongoing - on track Over the past year we have leveraged a range of channels to contact PSR customers and update their information - please find more detail in pages 8 to 9. As of the end of 2023/24, we have contacted 100% of all vulnerable customers over the past two years - this standard be maintained at the end of the 2024/25 regulatory year. While we are tracking the % of PSR records validated, we will report against the 60% commitment at the end of the second year of the ED2 period, in line with our commitment.

Delivering services to support customers in all aspects of vulnerability	We will deliver direct support services to 276,000 vulnerable & disadvantaged customers.	Lift customers out of fuel poverty and/or mitigate the negative impact of living in a situation of fuel poverty. Remove blockers that customers face to energy system transition. Ensure customer welfare when the need is identified.	**Milestone - Establish in-depth Fuel Poverty and Low Carbon Technology (LCT) programmes** Design and complete an appropriate tendering process resulting in a set of partners able to meet SPEN's ambitious in-depth service volumes evenly across our diverse network areas.		**Completed** In 2023/24 we worked closely with potential suppliers to (i) design the appropriate tender and contract strategy and (ii) stimulate interest among national and local charities to deliver the significant in-depth support volumes targeted for the ED2 period. The contracts are now in place and in-depth support is being delivered.
			Ongoing process - Deliver in-depth fuel poverty and LCT support as well as welfare referrals Work closely with delivery and referral partners to deliver the in-depth support programmes tendered (Milestone #1) and referrals to welfare services.		**Ongoing - on track** In-depth delivery partners are actively delivering Fuel Poverty and LCT support services, and we have also leveraged existing relationships with existing partners to deliver welfare services, as described on pages 15-23. We are on track to deliver the updated* target volume of (i) 60,000 Fuel Poverty in-depth services and (ii) 40,000 LCT in-depth services over the RIIO-ED2 period. *176,000 support services were removed from the commitment being tied to Consumer Value Propositions (CVPs) not accepted at final determinations.
Coalition of partners	We will transition our partnership model to be proactive by creating a coalition of organisations with shared goals and data-sharing governance to deliver holistic and efficient support.	To bring together a range of partner organisations whose purpose is to support people in need. This innovative network of support bodies offers a standardised approach to (i) recording customer needs and (ii) sharing referrals across organisations based on the needs that have been identified by any member of the coalition. Through a centralised function, the CoP integrates the support of all partners involved to provide a holistic support package to customers that addresses their situations of vulnerability to bring about material and lasting change.	**Milestone #1 - Run trial and extract learnings** Run an initial trial of the CoP in Glasgow and extract learnings to streamline operations.		**Completed** An initial trial phase with nine organisations in the Glasgow area has now been completed.
			Milestone #2 - Test the implementation of learnings, building on the trial Based on the extracted learnings, build solutions and implement them in the trial area.		**Ongoing - on track** We are in the process of implementing a set of strategic and operational modifications to ensure the CoP evolves into an increasingly scalable model. These improvements include the development of a web-compatible referral platform and a re-design of the Data Sharing Agreement to allow for a wider range of organisations to join. For more on this, please refer to page 5.
			Milestone #3 - Expand the CoP to other areas outside of the trial Expand the CoP into the broader Scottish and Manweb areas.		**Ongoing - on track** The improvements mentioned above are underpinned by a geographical expansion into the broader Scottish and Manweb regions. We will regionally scale the CoP once these measures are put into place.

Single shared vulnerability register	We will lead the creation of a single vulnerability register which our PSR will be part of, linking the organisations in our coalition partnership model. This 'Register Once' service will make it easy for customers to register for vulnerability services with multiple organisations.	A central register through which referral partners have holistic visibility of customer requirements, beyond common utilities needs codes (e.g. digitally excluded customers, those with low or no qualifications).	**Milestone #1 - Develop the processes/tools** Create the processes and tools to build a portal that allows partners to have visibility of customer needs.		**Complete** We developed and implemented an end-to-end process that provides partners with visibility of customer needs as part of the CoP. This process includes the following tools - an individual data form, a central database and referral forms that are all in place.
			Milestone #2 - Explore how different needs can be captured Explore how partners can work together to capture additional needs.		**Ongoing - on track** We are in the process of exploring how partners can work together to capture additional needs that are not yet being reported, including via our CoP platform.
Measure up against the best	We will benchmark our service externally every year to measure up against best practice, achieving relevant recognised international standards and score in top 5 UK companies through ICS service benchmark.	To continually ensure our processes are aligned with best practice.	**Ongoing process** Commit to maintaining best practice and achieving relevant recognised international standards, while scoring in the top 5 UK companies through the ICS service benchmark.		**Ongoing - on track** Over the past year, we have achieved a number of accreditations (including BSI Kite Mark and BSI18477:2010) and are proud to have scored in the top 5 UK companies through the ICS service benchmark. In addition, we conduct an annual scan for new and evolving standards to further push ourselves in this area and ensure our customers are receiving a high standard of service.
Prioritising customers for Low Carbon Technology support	We will use data creatively to understand those customers likely to face barriers in accessing low carbon technology due to social factors and overlay this with technology data creating an LCT Prioritisation ranking to enable us to best target our services.	Enhanced service targeting, which will allow us to better address the needs of customers and remove blockers they face to the energy system transition. This is closely linked to the 'Broadening PSR to capture wider vulnerability' commitment.	**Milestone #1 - Define a way to measure the risk of being left behind** Determine a way to measure and quantify the risk of being left behind faced by customers in a given community and develop a granular assessment of this risk across our network areas.		**Complete** We defined an approach to measure the risk of being left behind by linking direct customer research with publicly available datasets that capture situations of disadvantage (e.g. low qualifications, rural, low income). We then built a 'risk of being left behind' index based on this approach. This was achieved via the NIA-funded VEST innovation project.
			Milestone #2 - Create a comprehensive measure of vulnerability Integrate the 'risk of being left behind' index along with existing measurements of Fuel Poverty and PSR concentration to develop a granular measurement of vulnerability for each community we serve.		**Complete** We developed an approach to merge (i) Fuel Poverty data, (ii) PSR data and (iii) the novel 'risk of being left behind index' to produce a first-of-a-kind 'unified' view of vulnerability. This was achieved via the NIA-funded VEST innovation project.