

SSEN ED3 Business Priorities Research

Final report

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Scottish & Southern Electricity Networks

create clarity



01 Summary and key takeaways



In summary:

THE PRIORITY Reliability and resilience is the top priority for large business energy users, as for all customers, mainly because of business continuity.

DIVERGING VIEWS Beyond that, their priorities are more evenly spread. They put less weight on bringing down bills and more on cyber security, future skills, local economic growth and faster connections.

THE FUTURE They expect almost every priority to matter more over the next 10 years.

CONNECTIONS Connections are strategic: half have had a new connection in the last two years, and they want speed, cost certainty and visibility of network capacity.

SUPPORT They want digital tools for routine tasks and knowledgeable people for complex projects.

SSEN with Create Clarity

Dawn Mulvey and Michael Brainch

Executive summary

Large business energy users vs domestic and general business customers

Reliability and resilience is the top-ranked priority area across all customer segments, with strong consensus among domestic and general business customers.

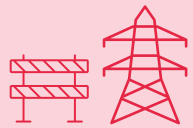
33% of domestic customers rank it #1

28% of business customers rank it #1

22% of large business energy users rank it #1

Aside from this, large business energy users have more evenly spread priorities overall. These customers want the same things as other customers in the sub priorities analysis (network resilience, extreme weather preparedness), but alongside a wider set of other concerns.

Affordability dominates for domestic and business customers. Helping bring down bills in the long term accounts for over 10% and 8% of weighted importance respectively. However, it ranks as a lower priority for large business energy users (2.7%), who instead spread their value for money priorities more evenly across long-term planning, use of technology, and SSEN empowering their people.



Large business energy users place distinctly greater weight on **cyber security** and **building skills for the future**, both closely tied to protecting and sustaining their own operations, as well as on local economic growth and faster, easier connections.



Large business energy users expect almost every priority to matter more in future. These customers aren't just prioritising differently today, they anticipate their expectations of SSEN broadening further over the next decade, especially around smart/secure network operation, customer service and economic growth.



Executive summary

What are the priorities of large business energy users?

IMPORTANCE OF 8 PRIORITY AREAS (large business energy users)

	RANKED 1ST	RANKED 1-3
Building a reliable and resilient network	28%	52%
Driving local economic growth	14%	33%
Supporting customers in vulnerable situations	12%	33%
Delivering value for money services	12%	40%
Minimising SSEN's direct environmental impact	9%	28%
Operating a smarter, more secure network	9%	41%
Providing high-quality customer service	10%	38%
Making new connections easier and faster	7%	36%

Reliability and resilience stands out as the highest priority for this audience. Beyond these, priorities are relatively evenly distributed, with around one-third of respondents placing each of the remaining areas in their top three.

Reliability is prioritised primarily for business continuity reasons, while economic growth, vulnerable customer support and value for money are valued more for their broader community and trust impacts than for direct business benefit.

R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. (Quant + Qual n=58)

Executive summary

Where specifically should SSEN focus?

IMPORTANCE OF 39 SUB-PRIORITY AREAS (large business energy users)

	Most important (weighted)
Making our network more resilient	4.9%
Planning for the long term	4.5%
Preparing for extreme weather	4.3%
Building skills for the future	4.3%
Prioritising cyber security	4.2%
Minimising the frequency of power cuts where possible	4.0%
Improving network efficiency	4.0%
Clear information about the connections process at the pre-application stage	3.5%
Ensuring transparent communications for our customers	3.2%
Helping bring down the bills in the long term	3.1%

Sub-priority rankings across the 39 areas are also relatively dispersed among large business energy users, reflecting the more even distribution of importance across the eight priority areas. This indicates that large business energy users prioritise multiple areas rather than one being clearly dominant.

Key to different sub-priority area colours



R5/ R8 Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Quant and qual n=57

Executive summary

How do priorities compare with other stakeholder groups?

↑ Significantly higher

↓ Significantly lower

OVERALL 8 PRIORITY AREAS RANKED IN FIRST PLACE

	Domestic	Business	Large business energy users
Building a reliable and resilient network	28%	33%	28%
Delivering value for money services	26%	20%	12% ↓
Supporting customers in vulnerable situations	13%	13%	12%
Providing high-quality customer service	9%	11%	10%
Minimising SSEN's direct environmental impact	8%	8%	9%
Operating a smarter, more secure network	7%	7%	9%
Driving local economic growth	4%	7%	14% ↑
Making new connections easier and faster	4%	3%	7% ↑

Compared with other audiences, large business energy users place less emphasis on delivering value for money and greater emphasis on supporting local economic growth and improving the speed and ease of new connections.

R1. Please rank the following potential investment areas from 1-8 (where 1 is the most important) to indicate which you feel are the most important for SSEN to focus on. (Quant + Qual n=58)

Executive summary

How do priorities compare with other stakeholder groups?

TOP 10 SUB-PRIORITY AREAS RANKING

	Domestic	Business	Large business energy users
Helping bring down bills in the long term	10.3%	8.3%	3.1%
Making our network more resilient	6.4%	7.2%	4.9%
Planning for the long term	5.1%	4.0%	4.5%
Preparing for extreme weather	4.7%	3.5%	4.3%
Minimising the frequency of power cuts where possible	4.4%	4.4%	4.0%
Improving network efficiency	4.1%	4.6%	4.0%
Providing extra support during storms	4.1%	3.8%	2.5%
Providing targeted support for our most vulnerable customers	3.9%	3.3%	2.5%
Minimising the duration of power cuts when they happen	3.3%	3.3%	2.5%
Supporting energy efficiency schemes	3.3%	2.7%	2.5%

Helping to bring down bills in the long term was the dominant priority for domestic customers and smaller businesses, but it ranks considerably lower among large business energy users. They take a more balanced view, placing importance on a wider range of commitments.

Key to different sub-priority area colours



R5/ R8 Please rank these investments from most important to least important, to show us which ones you think SSEN should focus on first. Quant and qual n=57

Executive summary

New electricity connections

CONNECTIONS EXPERIENCE

Large business energy users are more likely than domestic and smaller business customers to be aware of SSEN and have a better understanding of its role.

New electricity connections are particularly relevant to this audience. Around half have had a new connection installed within the last two years, and a further quarter are considering one.

When it comes to the connections process, speed of delivery is the most important factor, followed by a straightforward, easy-to-navigate process and access to responsive, knowledgeable customer support.

What to do:

- Make the new connections process as simple and intuitive as possible, with knowledgeable staff readily available to provide support when needed.
- Communicate clearly and consistently throughout the process, particularly regarding:
  - Timescales and delivery dates: provide realistic expectations and minimise delays wherever possible.
  - Connection costs: ensure pricing is transparent and customers have certainty about charges.
  - Progress updates: provide regular updates to keep customers informed and reduce uncertainty.
- This audience values speed, simplicity and transparency throughout the connections journey.

Qualitative research – Key findings

10 in depth interviews explored the perceptions of large business energy users in more detail

CONNECTIONS EXPERIENCE

Businesses see connections as increasingly critical to growth and decarbonisation, but want greater speed, certainty and transparency.

Experienced users can navigate the process relatively easily, while less experienced customers may find it complex.

The biggest concerns are uncertain costs and timescales, limited visibility of network capacity and delays caused by congestion/reform.

What to do:

- **Improve cost certainty:** provide clearer, more realistic costs earlier in the process.
- **Increase capacity visibility:** give customers better, up-to-date information about where capacity is available.
- **Communicate proactively:** flag constraints and alternative options earlier, rather than customers discovering them through the process.
- **Make connections simpler and faster:** reduce unnecessary complexity and delays, particularly for less experienced customers.
- **Offer digital and human support:** use digital tools for routine interactions, while retaining knowledgeable relationship support for complex projects.



02 Background

The rationale

SSEN conducted priorities research in 2025 with domestic and business customers to support the development of its RIIO-ED3 business plan.

The 2025 priorities research showed strong agreement between household and small business customers, but did not include large business energy users. This is a small but strategically important group whose reliance on the network, connection needs and investment timescales differ from those of households.

Follow up research in 2026 tested whether the ED3 priorities still hold for this audience, using the same ranking exercise so results can be compared directly, and explored connections and economic growth in more depth.

Research questions:

1. Do the ED3 priorities identified in 2025 hold for large business energy users?
2. Where do their priorities differ from household and small business customers, and why?
3. What do they need from the connections process?
4. How do they see SSEN's role in economic growth?



Key considerations for sample selection

The audience of interest is relatively small* and often underrepresented, making free-finding participants particularly challenging. We explored using a sample provided by SSEN; however, this approach raised concerns about potential GDPR data-transfer complexities. In addition, the stakeholders included in such a list would largely be those with existing relationships with SSEN (typically large connection customers) which could introduce an 'informed' bias.

As SSEN wished to understand the views of large business energy users more broadly, we mainly opted to free-find participants.
We targeted businesses with the following criteria:

BUSINESS DECISION MAKERS

Business decision makers held the following roles: Operations Directors / Heads of Operations, Facilities / Energy / Sustainability Managers, Procurement Heads (utilities/energy), Finance Directors, Site / Plant Managers

MEDIUM / LARGE ORGANISATIONS

Medium/ large organisations that are energy intensive:
1. The business uses >200,000 kWh electricity each year
2. Their annual electricity bill is £50,000 per site
3. The participant is a business decision maker
4. The participants' company has at least one site or office in one of SSENs regions (i.e. Scotland or central southern England).

***Sample size challenge:** According to the ONS, in the South East, there are 404,840 businesses of which less than 2% have 50 or more employees. It is this segment who were more likely to meet the energy use criteria for this research study.

Diversity, inclusion and ethical considerations

Inclusion was not treated as a separate exercise: it shaped who was recruited, how people could take part, and how complex information was presented.

DIVERSITY AND INCLUSION

- **Brings in an under-represented audience**, missing from earlier research
- **Largely free-found, not SSEN contacts.** Recruiting independently avoided only hearing from organisations that already have a relationship with SSEN.
- **Broad mix:**
  - Sectors including data centres, manufacturing, construction, energy, health, social care and charities.
  - Organisation sizes from under 50 to over 1,000 employees.
  - Both regions.
- **Energy use, not size.** Removing the employee threshold meant smaller but energy-intensive organisations weren't excluded.
- **Designed for a time-poor audience:**
  - A 5–10 minute survey.
  - Ranking 4–5 items at a time to reduce burden.
  - 30-minute depth interviews arranged around participants availability.
- Known gaps:
  - Online only, in English.
  - Views are from decision makers, not employees or local communities.

ETHICS AND DATA PROTECTION

- Conducted under the MRS Code of Conduct and UK GDPR.
- Free-finding avoided transferring SSEN customer data to the agency, which also reduced data protection risk.
- Business and individual names were collected only to check for duplicate responses.
- Informed consent to take part and to record interviews; recordings stored securely.
- Personal details stored separately from responses with access restricted to the project team.
- Personal data deleted after 6 months in line with Create Clarity's retention period.
- Participants could withdraw at any time and request access to or deletion of their data.
- Results reported in aggregate; quotes anonymised.
- £150 incentive per depth interview; panel respondents rewarded under the panel's standard terms.
- Independence: run by an independent agency, using the same framework as the 2025 study for consistency.



03 Methodology

A survey/ depth interview hybrid approach

To efficiently target this small universe, we conducted a quantitative survey using a panel of business decision makers. This was topped up by surveys completed using an open link shared by SSEN during stakeholder bilaterals. Finally, a small number of depth interviews explored the reasoning behind priorities.



Online research

A 5-10 minute quantitative survey engaged energy intensive business decision makers across SSENs operating areas in Scotland and Central Southern England in August 2026.

We produced a shortened version of the 2025 prioritisation survey for this time-poor audience. The key prioritisation elements were retained, enabling comparisons with the previous study while also supporting standalone analysis. The 2025 questionnaire was tested with customers before fieldwork, and this shortened version kept the same question wording. Interviews achieved using an online business panel with natural fallout across SSEN postcodes, no quotas.



External survey link

SSEN colleagues shared an external online survey link during conversations with political decision-makers and other large business energy users. Responses gathered through this route are analysed separately to those collected through the online survey and are reported in the wider synthesis.

We reviewed responses to identify any duplicate submissions, such as where the same individual completed the survey through more than one channel. Business and respondent names were collected as an initial check. Where multiple responses were received from the same organisation, these were reviewed on a case-by-case basis, recognising that different departments may hold different views. Any duplicate or invalid responses were removed where necessary.



Depth interviews

We recruited 10 decision-makers from high energy-use organisations to take part in a 30-minute depth interview. Before the interview, participants completed the online survey, allowing the discussion to explore their responses in more detail, understand the reasons behind their views, and gather richer insight into their priorities. Participants were free found (with the exception of two participants shared by SSEN who had completed the connections process).

Quantitative research – who we spoke to

An online survey of high energy-use businesses spending £50,000 or more on energy (per site) each year was conducted to explore views on the high-level ED3 priorities and identify which were considered most important.

50
High electricity use business customers

10
Qualitative depths

Sample definition

- In paid employment
- Responsible (jointly or solely) for the business electricity bills
- Spend £50,000 or more per year on electricity per site / office
- Have sites, offices or operational locations in the north of Scotland or Central southern England
  - 46% have sites in the North of Scotland
  - 78% have sites in Central Southern England



This report provides feedback from the 50 online interviews conducted with energy intensive business decision makers, plus 8 surveys completed by those taking part in the qualitative depth discussions (2 depth discussion participants provided their feedback 'live' during their interview). Feedback from the open survey link will be included in the final insight synthesis report.

Quantitative research – analysis approach

Analysis

- Customers ranked eight priority areas, then the 4–5 sub-priorities within each area.
- Sub-priority scores were weighted by the importance of their area to give an overall weighted importance.
- Areas were shown in rotated order to avoid order bias.
- Results were compared with the 2025 study (2,000 households, 200 businesses), with significant differences highlighted (95% confidence level applied).

Research limitations

- The research gives directional insight from a specialist audience rather than statistically representative results.
- A sample of 58 supports comparison with the wider priorities research but not detailed analysis by sector, size or region. The total was chosen because the population is small: fewer than 2% of businesses are large enough to qualify. This makes it appropriate for directional comparison.
- Large business energy users are not one group, so findings show common themes rather than a single business view.
- Results are unweighted and describe the participating businesses rather than all large business energy users.

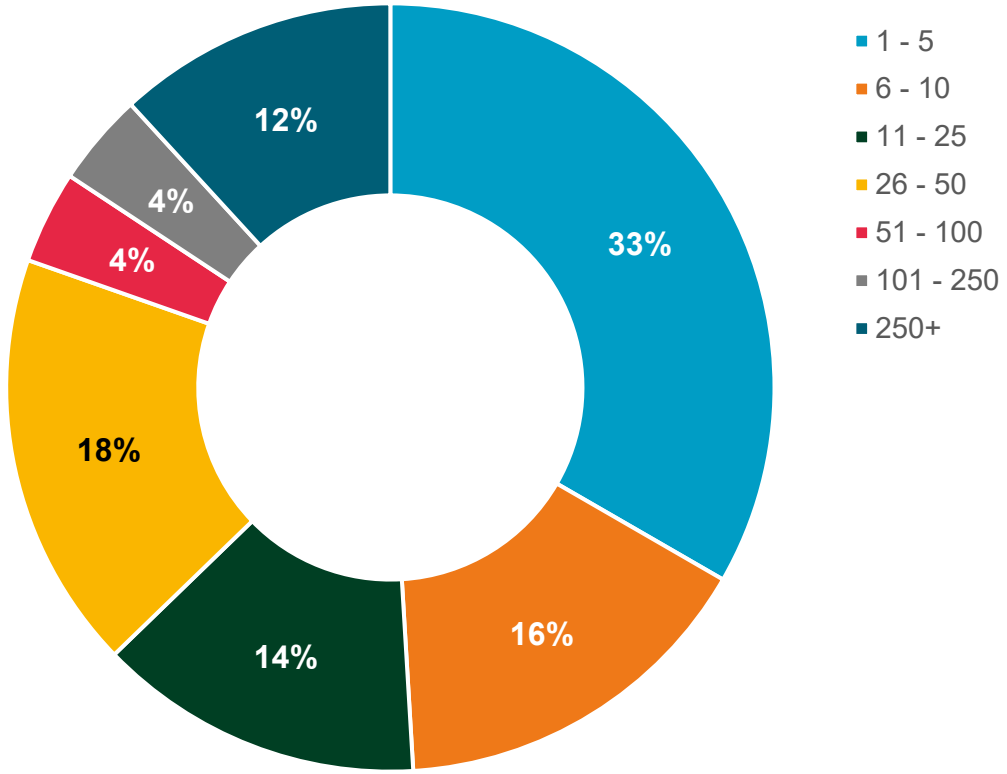


Sample profile – number of sites and employees

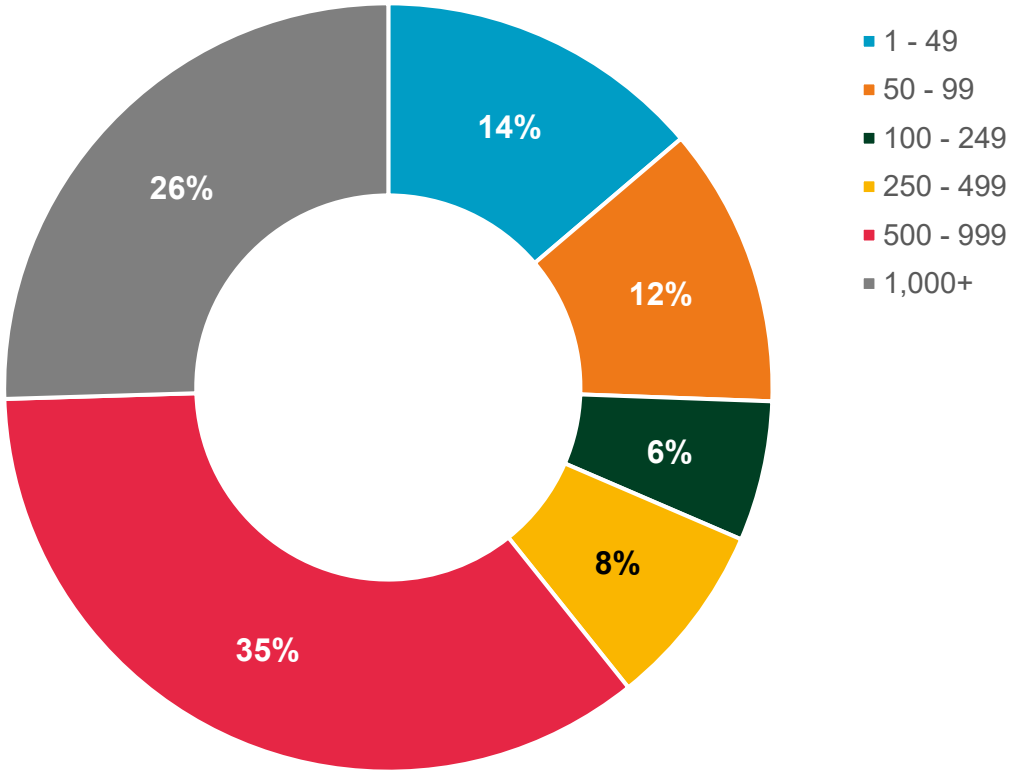
Large business energy users

We have feedback from a wide range of business sizes, both in terms of number of sites and number of employees.

Number of sites, offices or other locations in the UK



Number of employees



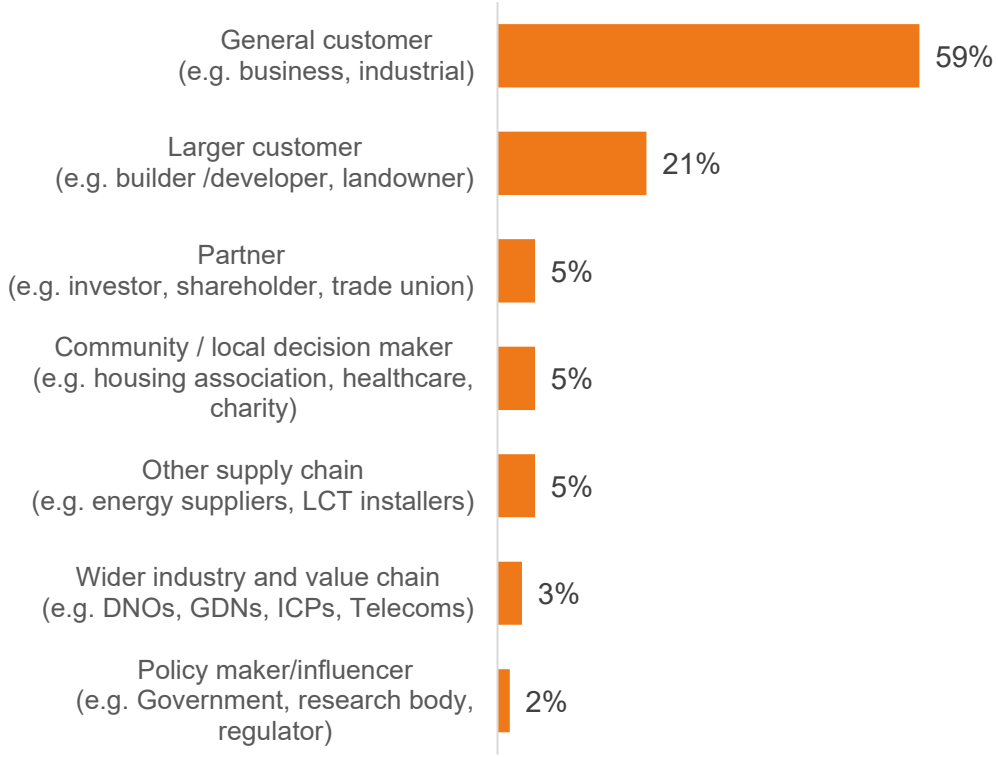
SQ6a Approximately how many sites, offices, depots, warehouses or operational locations does your organisation have within the UK?
SQ7. How many employees does your organisation have?
Large business energy users: 58

Sample profile – Type of SSEN customer

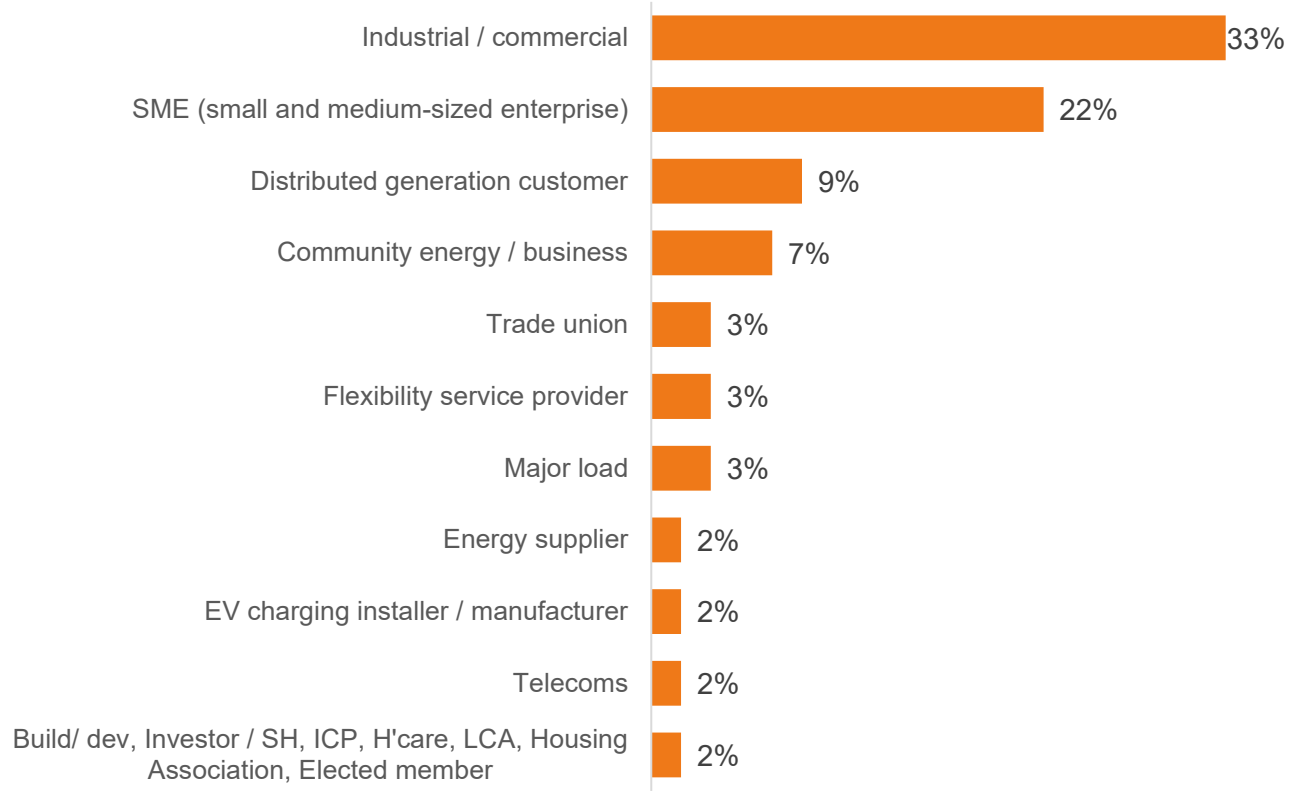
Large business energy users

Most high energy use business customers are general customers (predominantly industrial / commercial) or larger customers (mainly distributed generation customers, community energy customers)

Relationship with SSEN



Type of stakeholder to SSEN (Top 10)



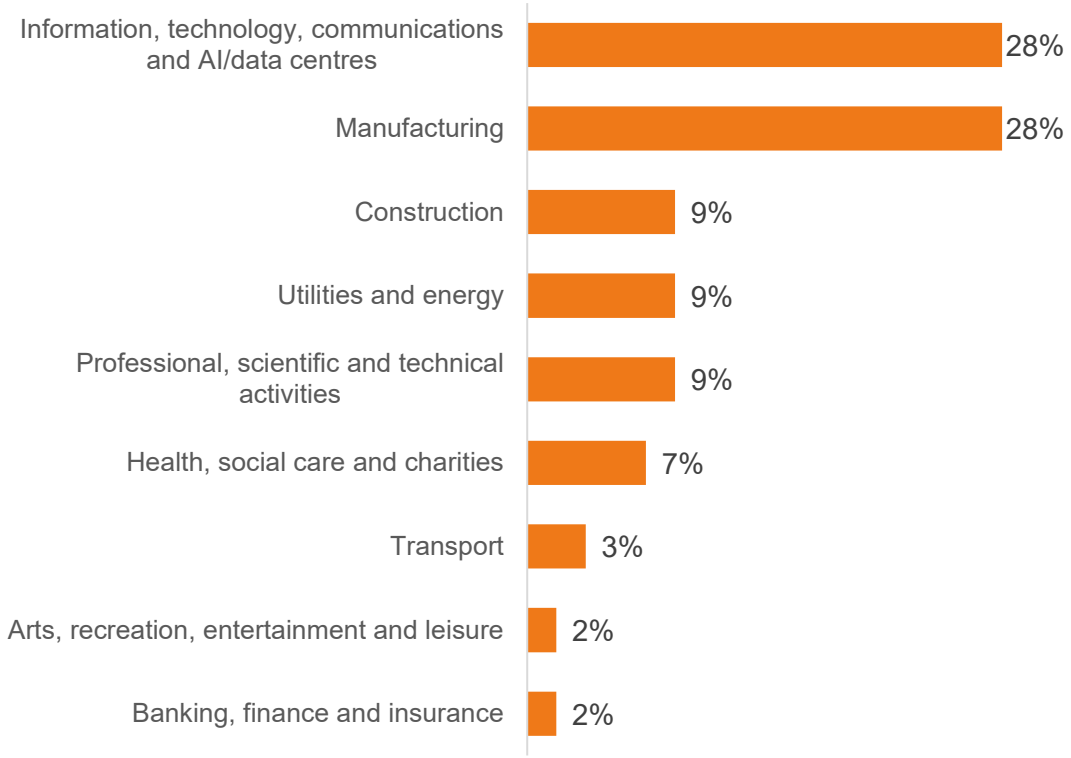
Q1. Which of the following best describes the type of relationship you have with SSEN?, Q1a. Specifically, which of the below best describes the type of stakeholder you are to SSEN?
Large business energy users: 58

Sample profile – Business sector

Large business energy users

The bulk of our high energy use business customers are within IT / tech / AI, manufacturing, construction, utilities and energy area, with a majority likely to see significant growth in electricity demand in the next 5 - 10 years.

Business sector



Whether sector likely to see significant growth in electricity demand in next 5-10 years

Yes - Data centres, AI and digital infrastructure	38%
Yes – Manufacturing and industrial processes	28%
Yes – Low-carbon technology	14%
Yes – Transport and EV charging	12%
Yes – logistics and distribution	3%
No	5%

SQ14a. What business sector best defines the core activity of your organisation? , Q8b Do you consider your organisation to be part of a sector that is likely to see significant growth in electricity demand over the next 5–10 years?
Large business energy users: 58

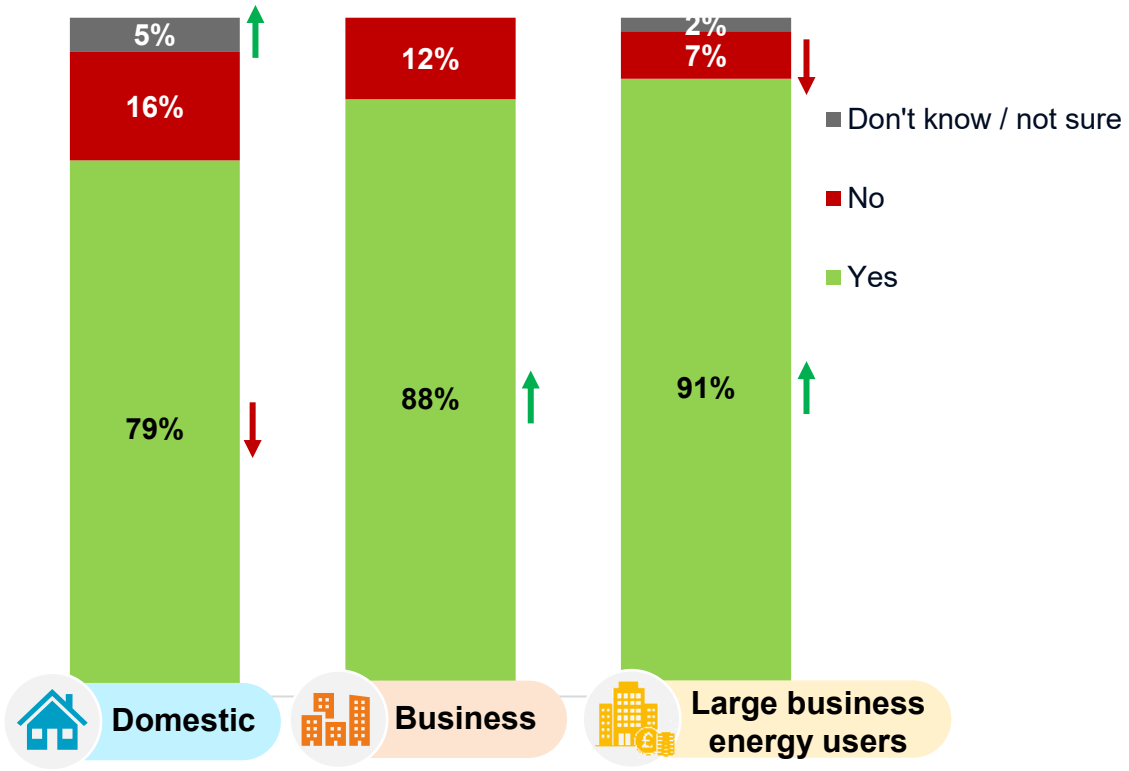
Sample profile – awareness of SSEN

Significantly higher

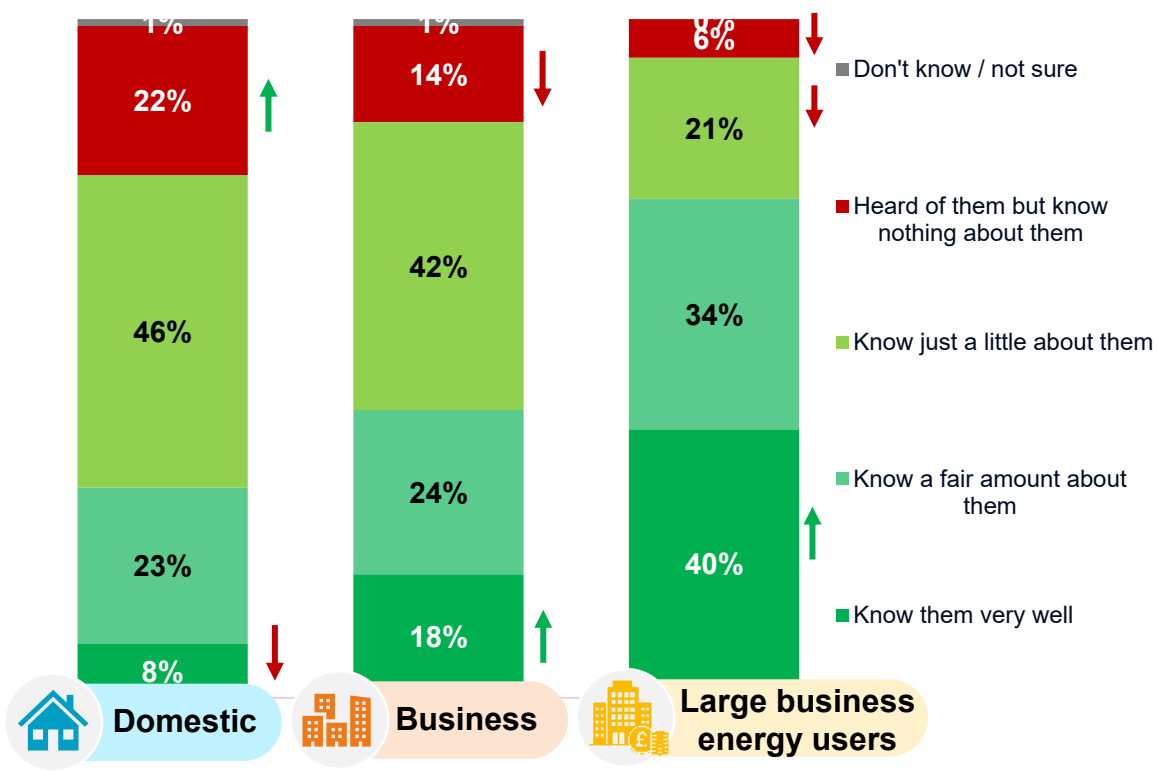
Significantly lower

High energy usage business customers are the most likely to have heard of and know the most about SSEN

Whether have heard of SSEN



How well they know SSEN (if heard of)



Q9. Had you previously heard of Scottish and Southern Electricity Networks (SSEN)? Domestic: 2000; Business: 200, Large business energy users: 58
Q10. How well do you feel you know SSEN and the services it is responsible for? Domestic aware of SSEN: 1,644; Business aware of SSEN: 176, Large business energy users: 53

Glossary: terms used in this report

Business decision maker	The person in an organisation solely or jointly responsible for its electricity bills or energy decisions
Connection	Linking a new site, building or piece of equipment to the electricity network, or significantly increasing an existing supply
Cyber security	Protecting the network's data, systems and equipment from malicious attacks
Data centre	A building that houses computer servers; a fast-growing, very high user of electricity
Depth interview	A one-to-one conversation (here, 30 minutes) exploring the reasons behind someone's views
Distributed generation	Electricity generated locally (for example solar or wind farms) and connected to the local network
DNO	Distribution Network Operator: the company that runs the local electricity network. SSEN is the DNO for the north of Scotland and central southern England
ED3 (RIIO-ED3)	Ofgem's price control for electricity distribution from 2028 to 2033, which sets what network companies can spend
Flexibility	Changing when or how much electricity is used, so the existing network can carry more
Free-found	Participants recruited independently by the research agency, rather than from a list supplied by SSEN
GDN	Gas Distribution Network: the company that runs the local gas network
GDPR	UK General Data Protection Regulation: the law on how personal data is collected, stored and used
ICP	Independent Connection Provider: an accredited company that can build some new network connections instead of the DNO
Large business energy user	In this research, an organisation using more than 200,000 kWh of electricity a year, with an electricity bill of more than £50,000
LCT	Low carbon technology, such as electric vehicles, heat pumps, solar panels and batteries
MRS	Market Research Society: the UK professional body whose Code of Conduct governs ethical research
Natural fallout	Taking whoever qualifies and responds, without setting quotas for particular types of business
Network capacity	How much electricity the network can carry in an area; when it is full, new connections may need upgrades
Ofgem	Great Britain's energy regulator
Online business panel	A database of business people who have agreed to take part in online surveys
ONS	Office for National Statistics: the UK's official statistics body
Open link	A survey link shared directly by SSEN with stakeholders; responses were analysed separately
Priority area / sub-priority	The eight broad areas SSEN could invest in, each broken down into 4–5 more specific investments
SME	Small and medium-sized enterprise: a business with fewer than 250 employees
Statistically significant	A difference between groups that is unlikely to be due to chance, shown in charts with arrows
Weighted importance	A score combining how highly each priority area and each sub-priority within it were ranked



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