

Surveying major customer connections

Feedback report

Key survey insights

Takeaway 1 | Overall, all eight respondents considered JEN had so far delivered their firms' connection needs consistent with their expectations.

Takeaway 2 | Most respondents understood JEN's connection process and accompanying information requirements, with all indicating that JEN's communication during the process was effective or very effective.

Takeaway 3 | Half the respondents engaged technical advisers to support their connection application processes, with most indicating that JEN was responsive to changes they requested during the process.

Takeaway 4 | Most respondents had experience seeking connections to other electricity networks, including both transmission and distribution networks located in Victoria, in other parts of Australia and internationally. Compared to those experiences, all indicated that their experience with JEN was favourable.

Takeaway 5 | Timelines were called out by respondents as an issue and potential area of improvement. However, JEN's communication regarding delays was viewed favourably.

1. INTRODUCTION

This feedback report sets out the outcomes and key insights from farrierswier's recent survey of Jemena Electricity Networks' (JEN's) major connection customers, undertaken on behalf of JEN. These customers are those where a new or augmenting customer requires a supply for maximum demand above 10 MW. This feedback report covers:

- the survey approach and purpose (section 2)
- whom the survey was sent to and the overall response rate (section 3), and
- customer feedback findings and insights (section 4).

The Notes to this report includes the survey for reference.

2. SURVEY APPROACH AND PURPOSE

This survey provides JEN information about the recent experience of its major connection customers when engaging with JEN to obtain a connection or connection augmentation. JEN will use the survey outcomes and insights to:

- understand major customer's recent experience of obtaining connections or connection augmentations
- inform continuous improvement in JEN's major customer connections processes, and
- provide supporting material for JEN's application to the Australian Energy Regulator (AER) to re-open the capital expenditure (capex) allowance that it determined for the 2021–26 regulatory period.¹

¹ JEN is seeking to reopen the capex allowance determined by the AER for the 2021–26 regulatory period to enable it to recover the

efficient costs caused by unforeseen major customer connections over that period, especially by data centres.

Farrierswier developed an approach and designed the survey in September 2024. The survey consisted of nine questions (set out in Notes). It was performed via the subscription version of Survey Monkey and provided customers with the option to anonymise their responses.

Relevant account managers at JEN then sent the survey to major customers identified as part of the JEN application to the AER.² Only one survey was sent to each major customer. A two week response window was provided for customers to complete the survey.³

3. PARTICIPANTS AND OVERALL RESPONSE RATE

JEN account managers sent the survey to 10 major customers. Eight responses were received (covering eight data centre connections, a three other infrastructure project connections), with seven respondents indicating a preference to remain anonymous. Rather than proving a business name, most respondents identified themselves as major customers in the industries set out in table 1.

Table 1 Industry

Industry	Responses
Public infrastructure	1
Commercial property development	1
Data centre	5*
Education	1
Total	8

*3 customers had 2 data centre connection sites on JEN's network.

Figure 1 Overview of connection process



² The intended customer list can be found in the JEN - Reopener - Major Connections Model (masterV2) model at column V of the 'Projects' worksheet.

³ The response window was open between 13-27 September 2024.

Respondents also identified where they are currently at in terms of the stages of the connection process. Other than [REDACTED] all respondents indicated that they are at a relatively mature stage of connection - that is, beyond the connection application stage - as shown in table 2 below. [REDACTED] is that the connection application stage.

Table 2 Project maturity⁴

Stage of connection process	Responses
Connection completed	-
1 or more stages completed within a multi-stage connection and augmentation process	2
Connection offer agreement	2
Early works agreement	3
Connection application	1
Connection inquiry	-
Total	8

⁴ Customers progressing through a multi-stage connection and augmentation process were asked to indicate the most advanced connection stage achieved over the past 3 years.

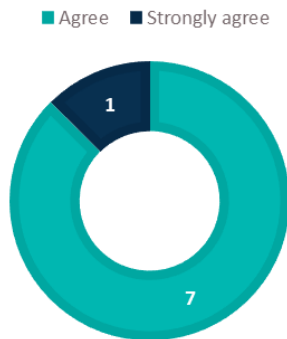
4. CUSTOMER FEEDBACK FINDINGS AND INSIGHTS

Of the 8 customer respondents, 5 provided specific comments or suggestions for JEN. Overall, these respondents considered JEN to be a customer-centric and transparent utility whose quality of engagement is a big success factor. The key area of improvement relates to timeliness of JEN’s connection process.

Responses to the survey questions and key takeaways are summarised below.

Takeaway 1 | Overall, all respondents considered JEN had so far delivered their firms’ connection needs consistent with their expectations.

Q1 | Overall Jemena’s delivery of my firm’s connection needs has met or is meeting our expectations



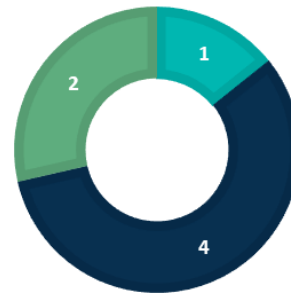
“Jemena are equal best with one other utility I've worked with for customer focused support and communication. It takes a customer who understands grid connection to get the best from a relationship with a utility such as Jemena, but given an open dialogue and transparent comms, Jemena is proven to reciprocate and grow effective partnerships”

Takeaway 2 | Most respondents understood JEN’s connection process and accompanying information requirements, with all indicating that JEN’s communication during the process was effective or very effective.

“Engagement with connection managers and technical managers is very transparent”

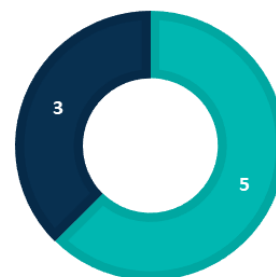
Q2 | Overall we understood Jemena’s connection process and information requirements for that process

■ Neither agree or disagree ■ Agree ■ Strongly agree



Q3 | How effective do you consider Jemena’s communication with you was during your connection process?

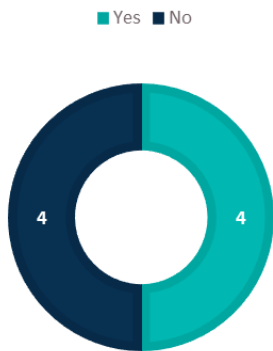
■ Effective ■ Very effective



“It has been a great journey working with [Jemena employee redacted] on a few connection work agreements. He is professional, responsive and always tries his best to address customer's concerns/needs. Looking forward to more partnership opportunities with him and the team.”

Takeaway 3 | Half the respondents engaged technical advisers to support their connection application processes, with most indicating that JEN was responsive to changes they requested during the process.

Q4 | Did you engage technical advisors to support your connection application process?

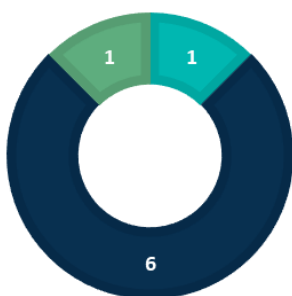


* Of the 4 customers who engaged a technical advisor, 3 were from the non-data centre sector. 4 of the 5 data centres who responded to the survey did not engage a technical advisor.

“Jemena is very responsive to asks and will consider technical changes where needed / requested - taking a customer-centric view rather than a network-centric view”

Q5 | How responsive do you consider Jemena’s team were to changes you requested during your connection process?

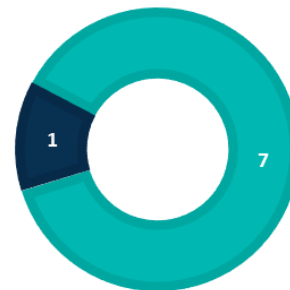
■ Don't know / neutral ■ Responsive ■ Very responsive



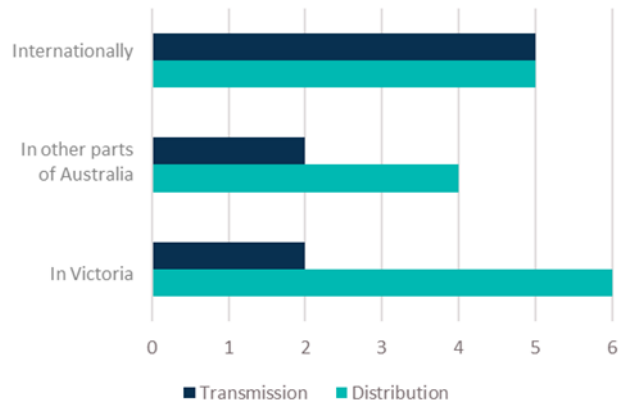
Takeaway 4 | Most respondents had experience seeking connections to other electricity networks, including both transmission and distribution networks located in Victoria, in other parts of Australia and internationally. Compared to those experiences, all indicated that their experience with JEN was generally favourable.

Q6 | Do you have experience with seeking connections to other electricity networks?

■ Yes ■ No



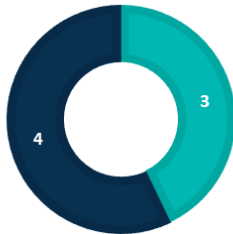
Q7 | If yes, please select which types and locations as relevant



“Jemena has dedicated resources for Data Centre applications, which is a great help. We see some other utilities doing this but not all and Jemena is in the forefront and it shows in the quality of engagement, understanding of our business needs and ultimately a big success factor”

Q8 | If yes, how do you consider your connection experience with Jemena compares to your experience of other networks' connection processes?

■ Somewhat favourable ■ Favourable



Note: Melbourne Airport did not provide a response to Q8

Takeaway 5 | Timelines were called out by respondents as an issue and potential area of improvement. However, JEN's communication regarding delays was viewed favourably.

"The timeline is lagging (which is my experience with Jemena previously too)"

"If timelines for application and delivery can be further improved as well then Jemena will further benefit"

"Although connection process has been later than expected, Jemena have kept team updated on progress" ([REDACTED])

NOTES: FINAL SURVEY QUESTIONS

Question 1: Consider the following statement and indicate your response: 'Overall Jemena's delivery of my firm's connection needs has met or is meeting our expectations'

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

Question 2: Consider the following statement and indicate your response: 'Overall we understood Jemena's connection process and information requirements for that process'

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

Question 3: How effective do you consider Jemena's communication with you was during your connection process? Rate from 1 (completely ineffective) to 5 (very effective)

1	2	3	4	5
Completely ineffective	Somewhat ineffective	Don't know / neutral	Somewhat effective	Very effective

Question 4: Did you engage technical advisors to support your connection application process?

1	2
Yes	No

Question 5: How responsive do you consider Jemena's team were to changes you requested during your connection process? Rate from 1 (completely responsive) to 5 (very responsive)

1	2	3	4	5	6
Completely unresponsive	Somewhat unresponsive	Don't know / neutral	Somewhat responsive	Very responsive	N/A to our process

Question 6: Do you have experience with seeking connections to other electricity networks?

1	2
Yes	No

Question 7: If yes, please select which types and locations as relevant from this list (tick as many as is relevant)

Network type	In Victoria	In other parts of Australia	In other countries
Distribution			
Transmission			

Question 8: How do you consider your connection experience with Jemena compares to your experience of other networks' connection processes?

Rate from 1 (completely unfavourably) to 5 (very favourably)

1	2	3	4	5
Completely unfavourably	Somewhat unfavourably	Don't know / neutral	Somewhat favourably	Very favourably

Question 9: Do you have any other comments or suggestions for our team?

Free form text box