

# **Analysis of small business retail energy bills in Australia**

Final Report, December 2019

## **Small and Medium Enterprise (SME) Retail Tariff Tracker Project**

Prepared by Alviss Consulting, with Energy Consumers Australia



## **Disclaimer**

The energy offers, different energy plans (tariffs) and bill calculations presented in this report and associated workbooks should be used as a general guide only and should not be relied upon. The workbooks are not an appropriate substitute for obtaining an offer from an energy retailer. The information presented in this report and the workbooks is not provided as financial advice.

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If you would like to obtain information about energy offers available to you as a customer, go to the relevant regulator's website or contact the energy retailers directly.

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## The Small Business Tariff-Tracking Project: Purpose and outputs

The Small and Medium Enterprise (SME) Retail Tariff Tracker is an ongoing project that will evolve based on feedback received and new retail tariff data being collected.

To date this project has collected and compared small business electricity and gas retail tariffs across Australia and developed a spreadsheet-based tool that allows consumer advocates, and other interested parties, to compare prices and produce their own analysis. Workbooks, which allow the user to enter consumption levels and analyse bills for electricity and gas market offers available to small business customers as of April 2016, April 2017, October 2017, April 2018, October 2018, April 2019 and October 2019, have been developed for each jurisdiction.<sup>1</sup> While every update of the workbooks will be accompanied by a report, we stress that the workbooks themselves are integral to this project and can be accessed at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

The analysis presented in this SME Retail Tariff Tracker project update report is based on retail offers available in October 2019 as well as those collected in April 2019, October 2018, April 2018, October 2017, April 2017 and April 2016. The consumption levels of 20,000 kilowatt hours for annual electricity consumption and 100 gigajoules for annual gas consumption used for comparing changes in annual bills in this update report reflect feedback received on the SME Retail Tariff-Tracker: Preliminary Report (October 2017) and are consistent with those used for the previous update-report (December 2017, June 2018, December 2018 and June 2019).<sup>2</sup> Readers interested in more background information about SME energy customers, contract and tariff types may also want to refer to the Preliminary Report.

As we collect more data over time the analysis and reporting will evolve. The project aims to highlight issues and trends in relation to price changes, bill-stacks, supply charges, discounting etc. However, the intention is not to ensure that every report covers all potentially interesting aspects in relation to SME energy prices. Timeliness of the update reports is crucial in order to ensure that SME customers, as well as other stakeholders, have access to up to date information. The timeliness aspect of the SME Tariff-Tracking project also means that the aim is not to explore or explain why changes are occurring. Rather the analysis and the findings should be regarded as a tool to track changes and identify potential issues in the SME energy retail markets. As such the aim of the reports is more to serve as conversation starters rather than proposing solutions to issues identified.

The tariff collection points will continue to be April and October each year. This means that the update report based on April data will be particularly relevant for capturing recent price changes in Victoria (where the major price re-set occurs in January every year) while the update report based on October data will be particularly relevant for analysis of recent price changes in all other jurisdictions.

This report presents some of the key findings produced by the SME Tariff-Tracking tool to date.

<sup>1</sup> All market offers are published offers and do not include special offers that retailers market through special campaigns or brokers. All offers have been sourced from the retailers' websites directly. The offers included in the analysis for this report are listed in Appendix A.

<sup>2</sup> Available at <https://energyconsumersaustralia.com.au/publications/sme-retail-tariff-tracker-preliminary-report-october-2017>

## Key findings

Key findings in this update report on the SME Tariff-Tracking project in regard to bills, price changes, prices-spreads, discounts, supply charges and network charges include:

### **SME ENERGY BILLS AND ANNUAL PRICE CHANGES**

- A jurisdictional comparison of SMEs consuming 20,000 kWh per annum shows that **South Australian businesses continue to have the greatest annual electricity bills (\$7,940) while Tasmanian businesses have the lowest (\$5,535). See section 3.1.**
- On average, nationally, **annual electricity bills for SMEs with this consumption level decreased by approximately \$55 or -1% between October 2018 and October 2019.** The greatest decrease in annual electricity bills is in Queensland (-6%). Businesses in the ACT, on the other hand, received an increase of 5%. **See section 3.1.**
- A jurisdictional comparison of SMEs consuming 100,000 MJ per annum shows that **Tasmanian businesses continue have the greatest annual gas bills (\$4,635) and Victorian businesses have the lowest (\$2,120). See section 3.2.**
- On average, nationally, annual gas bills did not change between October 2018 and October 2019. On a jurisdictional level however, **annual gas bills for SMEs with this consumption level (100,000 MJ) have increased by \$175 (5%) in South Australia while they have decreased in Queensland, Victoria, the ACT and Western Australia. See section 3.2.**

### **IMPACT OF NEW REGULATION**

- The regulated Default Market Offers (DMOs) took effect on 1 July 2019 and have replaced the retailer determined standing offers previously available in NSW, South Australia and South East Queensland. In Victoria, the Victorian Default Offer (VDO) took effect on 1 July 2019 and all small businesses previously on a retailer's standing offer have been moved to the VDO. **See section 3.1.6.**
- On average, **the DMO/VDO have lowered standing offer bills by approximately -27% in Victoria, -9% in NSW, -8% in South Australia and -6% in South East Queensland.**<sup>3</sup>

### **PRICE-SPREADS**

- The difference between the market offers, the maximum price spread, has decreased in NSW, South Australia and Victoria while it has increased in the ACT. In October 2019, **the maximum price spread in the ACT was \$1,165, \$1,230 in NSW, \$1,325 in South East Queensland, \$1,350 in Victoria and \$1,800 in South Australia.**<sup>4</sup> **See section 3.1.1.**
- The price spread for gas decreased in Tasmania, NSW and Victoria, compared with the same period a year ago, while it increased in South Australia, the ACT

<sup>3</sup> Based on the 'big 3' retailers' standing offers prior to DMO/VDO taking effect and small businesses consuming 20,000 kWh per annum.

<sup>4</sup> Based on annual consumption of 20,000 kWh and as of October 2019 the analysis is based on 6 retail offers in the ACT, 16 retailers South Australia, 18 in South East Queensland, 21 retailers in NSW and 22 in Victoria.

and Queensland. **Currently the ACT has the greatest price spread (\$875) despite there only being three retailers offering gas contracts in the ACT.**<sup>5</sup> As of October 2019, the maximum price spread was \$685 in South Australia, approximately \$505 in Victoria, \$305 in Queensland and \$285 in NSW. In Tasmania, the maximum price spread was \$130.<sup>6</sup> [See section 3.2.1.](#)

### **ADDITIONAL DISCOUNTS**

- **Compared to six months ago (April 2019), discounts have significantly reduced.** In Victoria, for example, the difference between the average market offer bill excluding discounts, and **the average market offer bill including discounts was \$1,450 in April 2019 compared to \$325 in October 2019.** Additional discounts applied to electricity offers have the greatest impact in NSW (reduces a typical annual bill by approximately \$445) while they have the least impact in Tasmania (approximately \$130).<sup>7</sup> [See section 3.1.2.](#)
- In relation to gas offers, **discounts have greatest impact in Western Australia (reduces an average annual bill by approximately \$960) while they have the least impact in Queensland and South Australia (approximately \$80 and \$125 respectively).**<sup>8</sup> It should be noted, however, that Western Australia only has three retailers that publish SME market offers and that this discount reflects the 45% discount offered by AGL and 30% discount offered by Origin Energy. Both retailers are relatively new entrants in the WA gas retail market. [See section 3.2.2.](#)

### **FIXED SUPPLY CHARGES**

- As of October 2019, **fixed electricity supply charges had decreased, or remained unchanged, in all jurisdictions except Tasmania and Western Australia (where they increased) compared with the same period a year ago.** Western Australia used to have relatively low supply charges but in July 2018 it increased considerably (by \$440 per annum) and it is now the highest supply charge in the country (\$648 per annum). Fixed supply charges are \$613 in NSW (decrease of -3%), \$453 in Victoria (decrease of -17%), \$510 in Queensland (decrease of -2%), \$487 in the ACT (no change), \$378 in Tasmania (increase of 2%) and \$370 in South Australia (no change). The supply charge is lowest in the Northern Territory (\$292). Fixed supply charges as a proportion of the annual bill are currently highest in NSW and Western Australia (10%) and lowest in South Australia and the Northern Territory (5%). [See section 3.1.3.](#)
- Compared with the same period a year ago, **the highest increases in fixed gas supply charges were in the ACT (an increase of 7% to \$605 per annum) and Tasmania (an increase of 4% to \$500).** In South Australia, there has been a small increase (1% to \$490). In NSW and Queensland, the supply charges

<sup>5</sup> ActewAGL does not offer any discounts on their standard gas offer. Customers that sign up for a dual fuel contract, however, do receive a discount.

<sup>6</sup> Based on annual consumption of 100,000 MJ and analysis based on 11 retail offers in Victoria, 7 retailers in NSW, 6 in South Australia, 3 in the ACT and 2 retailers in Tasmania and Queensland. Analysis does not include WA as AGL and Origin are relatively new entrants in the WA gas retail market. As of October 2019, however, the maximum price spread in WA was \$1,730.

<sup>7</sup> Jurisdictions without market offers have not been included in this analysis. For Queensland, it is based on market offers in South East Queensland (Energex network) only.

<sup>8</sup> Jurisdictions without or only a few market offers have not been included in this analysis.

decreased while the supply charges remained stable in Victoria and Western Australia. Fixed supply charges as a proportion of the annual bill are highest in the ACT and Victoria (19% and 17%) and lowest in Western Australia (4%). [See section 3.2.3.](#)

### **ELECTRICITY NETWORK CHARGES**

- Compared with the same period a year ago, **the Network Use of System Charges (NUOS) decreased in NSW (-6%), South East Queensland (-3%) and Tasmania (-2%)**. In South Australia and the ACT, on the other hand, it increased by 9%. In Victoria, the increase is a more modest 2%. As of October 2019, South Australia is the jurisdiction with the highest NUOS charges (approximately \$3,260 for a SME consuming 20,000 kWh per annum) while Queensland has the lowest (approximately \$2,000 for the same consumption level).<sup>9</sup> [See section 3.1.4.](#)
- Since April 2016 (when this SME Retail Tariff Tracker project commenced) there was first a trend decline in NUOS as proportion of the total retail bill in all jurisdictions. As of October 2019, however, **there is an increase in the NUOS proportion in all NEM jurisdictions except NSW and Tasmania**. In October 2019 **the NUOS proportion of bills was highest in the ACT and South Australia** (42.3% and 41.1%, respectively). [See section 3.1.4.](#)

### **ELECTRICITY BILL-STACKS**

- In order to examine what businesses actually pay for the various goods, services and policies that are costed by the supply chain and passed on to consumers in a retail bill, we deduct estimated cost components from the average annual retail bill for businesses using 20,000 kWh per annum as of October 2019.<sup>10</sup> The residual retail component of the average market offer bill is as low as 2% in the ACT and as high as 19% in Tasmania.<sup>11</sup> [See section 3.1.5.](#)

### **JURISDICTIONAL ANALYSIS**

- **Section 4 of this report analyses and compares electricity and gas offers available to small business customers in each of the jurisdictions.** It compares price spreads (maximum price differences between retail offers) and assesses the impact guaranteed and conditional pay on time discounts have on energy bills. It also examines changes to network cost and estimates the network cost proportion of total electricity bills. Furthermore, it highlights price changes (increases and/or decreases) that have occurred over the previous six months,<sup>12</sup> differences to annual bills (based on assumed consumption levels) between retailers, as well as electricity networks and gas pricing zones within each jurisdiction.
- There are significant differences between the various retailers' bills, use of

<sup>9</sup> Based on annual consumption of 20,000 kWh

<sup>10</sup> To estimate wholesale and environmental ('green-scheme') costs we used the AEMC, 2018 Residential Electricity Price Trends (EPR0064), Databook available at <https://www.aemc.gov.au/market-reviews-advice/residential-electricity-price-trends-2018>

<sup>11</sup> All market offers are inclusive of any guaranteed or pay on time discount offered by the retailers.

<sup>12</sup> As the last data collection of retail offers occurred in October 2019, offers as of October 2019 have been compared to offers as of April 2019 (the previous data collection).



additional discounts and network charge proportion of bills across jurisdictions.

- **In NSW, South East Queensland and South Australia, none of the retail market offers (including guaranteed discounts) produce annual bills that are greater than the DMO. In Victoria, two retailers have market offers that produce higher bills than the VDO, some retailers have offers where customers need to obtain conditional discounts in order for the bill to be lower or similar to the VDO, and some retailers have offers that are lower than the VDO.**

## 2. Methodology and caveats

### 2.1 Energy bill analysis and factors influencing price

When analysing the impact tariff changes have on customers' energy bills it is important to be mindful of the various cost components bills are made up of (the bill stack), as well as demand side characteristics such as consumption levels and patterns, and how all these factors may influence the cost of energy.

Firstly, energy bills are made up of three key components: competitive market costs, network costs and 'green scheme' costs. According to the Australian Energy Regulator (AER), the wholesale costs accounts for 34% of residential customers' electricity bills, the regulated network cost is 43%, retail (costs and margins) is 15%, and 8% are 'green scheme' costs.<sup>13</sup> For gas, the wholesale component accounts for 33% of the total bill, network cost is 43%, and retail (costs and margins) is 24%.<sup>14</sup>

The regulated electricity network costs include transmission use of system charge and distribution use of system charge, as well as the cost of meters, meter reads and other ancillary services. The role of retailers is to manage the risk of the wholesale market and thus offer energy products suitable to end-users. All these components influence changes to energy costs and customers' bills. For example: generation costs vary according to fuel sources used, and supply and demand; transmission and distribution costs can go up due to approved network upgrades; retail costs or pricing strategies will be influenced by how well the retailer has managed risk (i.e. their hedging contracts) and effectiveness of competition and other cost inputs the retailers have to manage.

Secondly, as the tariff-tracking tool allows the user to nominate consumption level as well as peak/off-peak proportions where relevant, it is important to be mindful of the significant difference between small businesses' consumption level and usage pattern. Gas bills are particularly difficult to estimate as consumption can be highly seasonal. However, the tool allows the user to analyse bill impacts based on their own assumptions or the type of small business they have in mind.

### 2.2 Types of businesses and consumption levels

Small business customers are a very heterogeneous customer group in terms of consumption levels, consumption patterns and fuel mix. While households certainly vary in terms of consumption levels and patterns as well, the type of business being conducted can arguably have a much greater impact on consumption, and thus costs. A small office-based business largely operating during business hours will have very different consumption levels and usage patterns to a restaurant that is open seven days a week with peak operating hours during the evening.

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<sup>13</sup> Note that these are NEM averages and that the 'bill-stack' does vary between jurisdictions. Also, while the AER analysis is based on residential customers, the breakdown is similar for SMEs. AER, *State of the Energy market 2018*, 36.

<sup>14</sup> Ibid, 38.

As part of the small business SME Retail Tariff Tracker project, we aim to establish some potential business profiles that can increase understanding of the various energy needs and usage patterns of different, but relatively common, types of small businesses. We therefore hope these reports will trigger interest in the issues pertaining to small business energy customers and start a dialogue amongst stakeholders that will inform this project as well as Energy Consumer Australia’s work more broadly.

### 2.3 Consumption levels used for this analysis

In order to make a national comparison of electricity and gas bills we have chosen a standard annual consumption level of 20,000 kWh per annum, with the same rate charged for usage all day (which is termed the single rate). For gas we have used a standard annual consumption level of 100 GJ per annum.<sup>15</sup> The 20,000 kWh electricity consumption is based on a (rounded) average of average consumption for small businesses in various NEM networks by Jacobs Australia for the Australian Energy Market Operator (AEMO) presented in Table 1 below. We arrived at the 100 GJ gas consumption after receiving feedback that the previous assumption of 250 GJ was too high for all jurisdictions except Victoria.

Average consumption levels vary significantly between jurisdictions due to factors such as climate and fuel mix. In Victoria, for example, gas penetration is high and this means that many businesses use gas for purposes that Tasmanian businesses, for example, are more likely to use electricity for. Overall, an assumed standard annual electricity consumption of 20,000 kWh is high in NSW’s Ausgrid network, South Australia and South-East Queensland (Energex), while it is very low for the ACT. An assumed standard annual gas consumption of 100 GJ is low for Victoria and the ACT while more representative for other parts of Australia.

**TABLE 1 | Estimated average consumption and typical tariff types for selected NEM network areas<sup>16</sup>**

Jurisdiction	Network	kWh/annum	Common tariff/meter type
NSW	Ausgrid	13,000	EA050 (single rate)
NSW	Endeavour Energy	27,299	N90 (single rate)
VIC	Citipower	36,209	C1G (single rate)
VIC	Powercor	21,674	ND5 (interval tariff)
VIC	Ausnet Services	24,724	NEE12 (single rate)
VIC	Jemena	21,858	A200 (single rate)
VIC	United Energy	23,629	LVM1R (single rate)
QLD	Energex	16,628	8300 (demand tariff)
SA	SAPN	14,262	2 rate (peak/off-peak rate)
TAS	TasNetworks	25,315	TAS22 (single rate)
ACT	Evoenergy	32,257	General network (single rate)

<sup>15</sup> Feedback received on our preliminary report (October 2017) included that previous assumptions used for consumption levels were too high for most networks and that using different consumption levels for the jurisdictions made the analysis unnecessarily confusing.

<sup>16</sup> Table based on Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

In terms of tariff types, the single rate, the tariff type used for this analysis, is the most common for small businesses in all network areas except Energex, Powercor and South Australian Power Network (see table 1). Finally, we would encourage anyone with interest in energy bill analysis of different tariff types and/or consumption levels to use the small business SME Retail Tariff Tracker project workbooks available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

## **2.4 Bill calculations**

Energy offers are made up of numerous rates and charges (i.e. peak rates, off peak rates and supply charges) and in order to compare offers, or prices, we have based the analysis on estimated annual bills for certain consumption levels. Annual bills, inclusive of guaranteed discounts, pay on time discounts and GST, have been calculated for all retail offers.<sup>17</sup> When the report refers to the average bill for a jurisdiction or a network, it refers to the average (arithmetic mean) bill based on all relevant retailers. The average bill is not weighted to reflect individual retailers' customer numbers.

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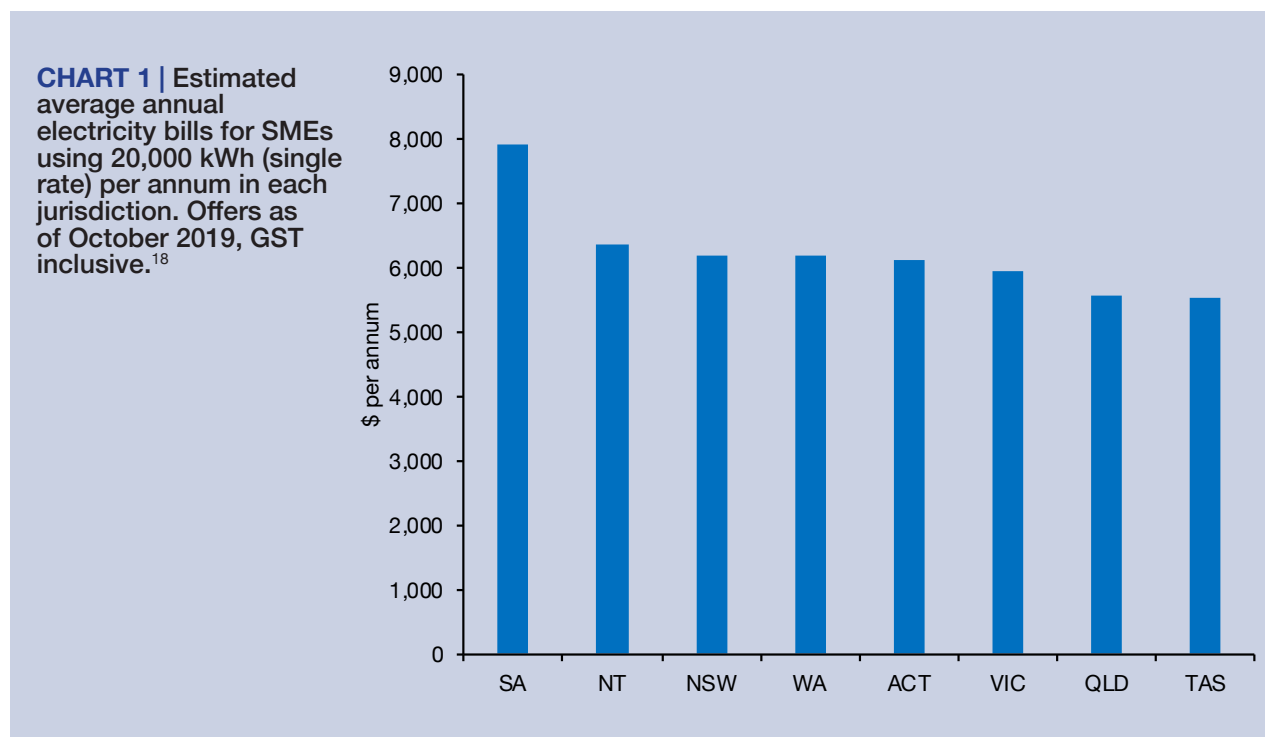
<sup>17</sup> Appendix A contains a list of all offers used for this report.

### 3. National comparison of energy bills

This section analyses and compares electricity and gas offers available to small business customers in Australia, based on available retail offers as of April 2016, April 2017, October 2017, April 2018, October 2018, April 2019 and October 2019. The analysis highlights changes to energy bills, jurisdictional differences to annual bills (based on assumed consumption levels) as well as electricity networks, differences in the fixed supply charges and the impact guaranteed and conditional pay on time discounts have on energy bills in various areas. It also estimates the size of the network, wholesale, 'green schemes' and retail components of electricity bills. As the electricity Network Use of System (NUOS) charges change on 1 January in Victoria and on 1 July in all other jurisdictions, the April data, and associated report, will typically reveal recent price changes in Victoria while the October data (and report) will highlight major price changes in the other jurisdictions. That said, there are minor changes to most of the competitive energy retail markets throughout the year, and the six-monthly update approach ensures that both major and minor price resets in each jurisdiction are covered.

#### 3.1 Electricity bills

Chart 1 shows estimated annual electricity bills for SMEs that consume 20,000 kWh per annum across all states and territories. South Australian businesses with this consumption level will typically have an annual electricity bill of approximately \$7,940, while Tasmanian businesses will pay \$5,535.



<sup>18</sup> Based on offers available in October 2019. Average market offer (including guaranteed discounts and pay on time discounts) for each network area. For areas without market offers (the Ergon Energy, PWC, Horizon Energy and Western Power networks) the bills are based on the regulated/standing offer.

Chart 2 shows changes to electricity bills from April 2016 to October 2019. It shows that bills increased in all jurisdictions except for Tasmania during the period but that the increases vary significantly between jurisdictions. Furthermore, it shows that average bills have decreased in NSW, Victoria, Queensland and South Australia over the last six months.<sup>19</sup>

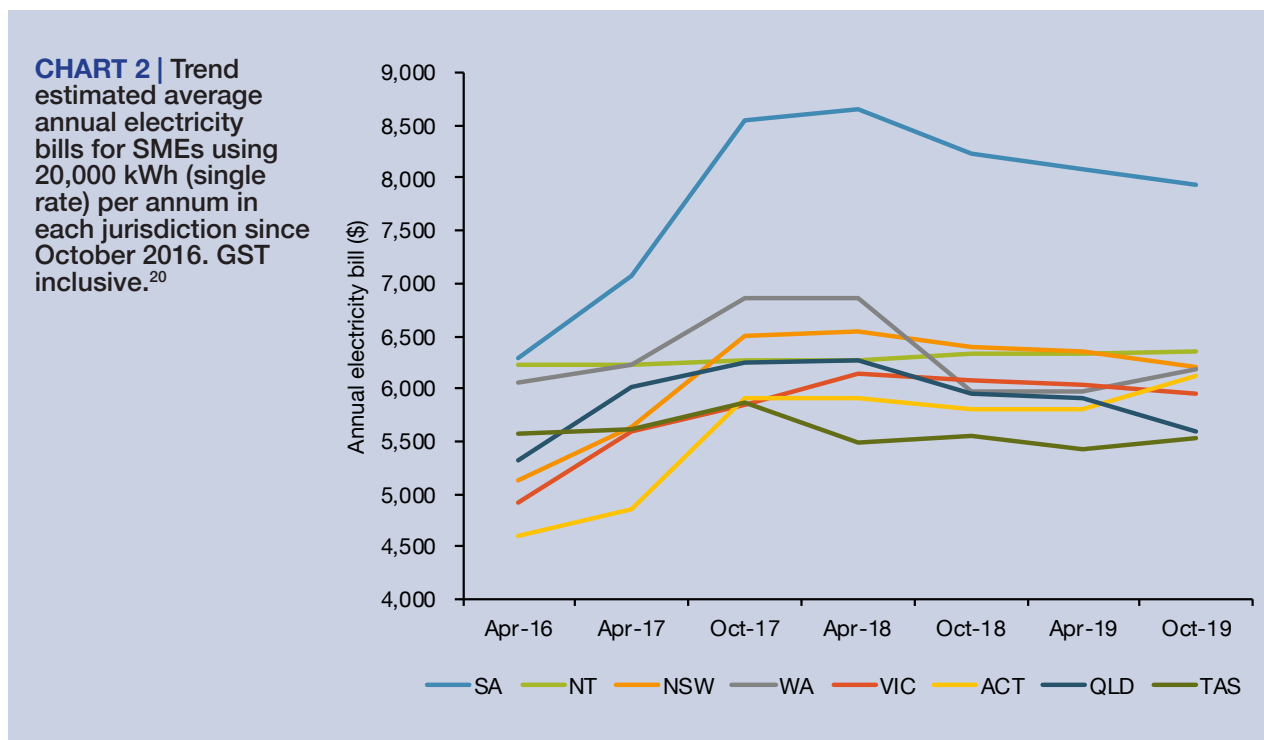


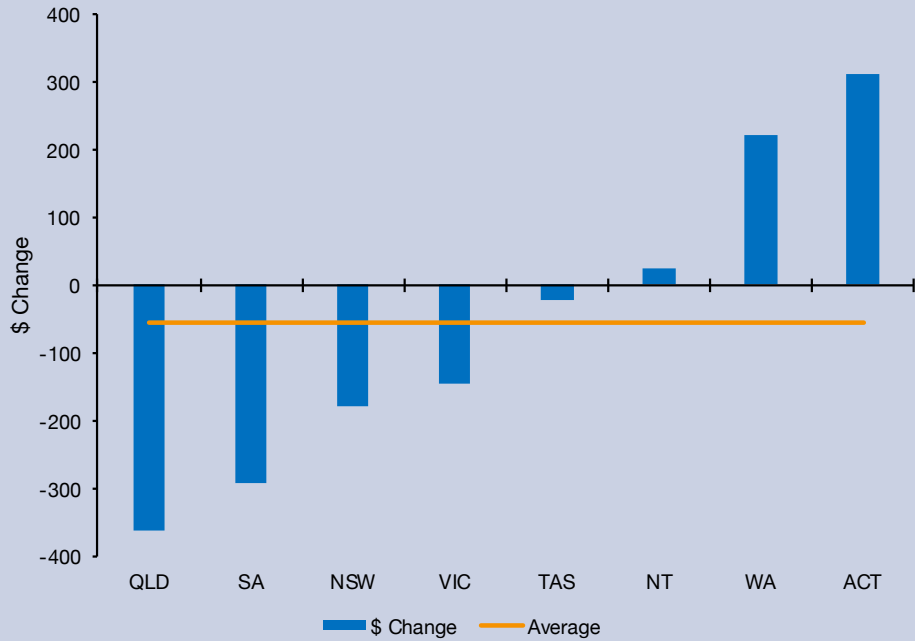
Chart 3 shows \$ changes to annual bills between October 2018 and October 2019. On average, nationally, annual electricity bills for SMEs with this consumption level decreased by approximately \$55 or -1% between October 2018 and October 2019. The greatest decreases in annual electricity bills are in Queensland (\$363) while businesses in the ACT had increases (\$310).<sup>21</sup>

<sup>19</sup> Note that a second retailer entered the Tasmanian market during this period and that the average bill calculation for October 2019 is based on Aurora Energy and 1st Energy's offers.

<sup>20</sup> Average market offer (including guaranteed discounts and pay on time discounts) for each network area. For areas without market offers (the Ergon Energy, PWC, Horizon Energy and Western Power networks) the bills are based on the regulated/standing offer.

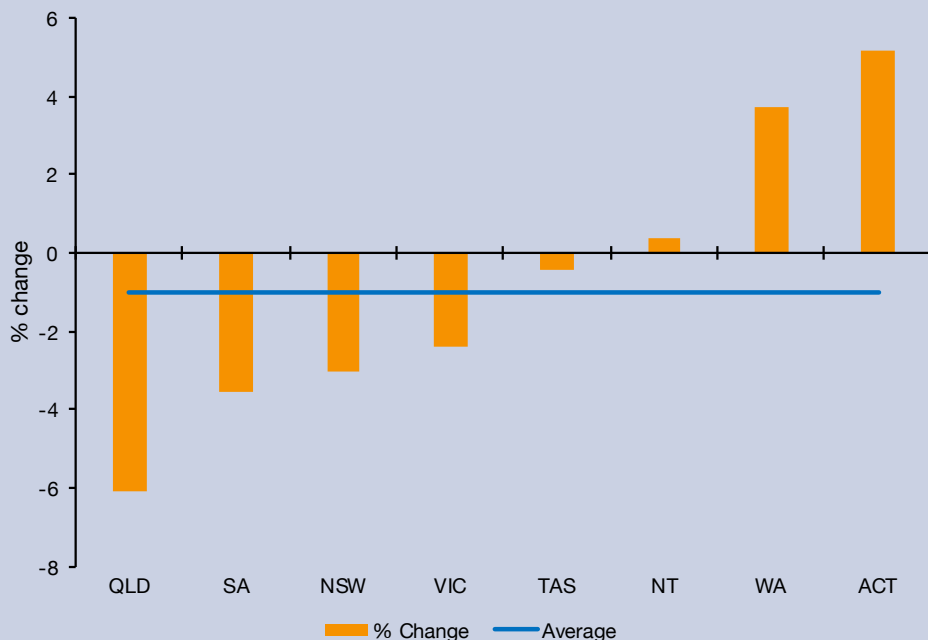
<sup>21</sup> Note that these price changes may differ from the overall averages in the jurisdictional analyses (section 4 below). This is because the average bill in this section is based on all retailers offering retail contracts as of October 2018 and October 2019 while the jurisdictional analyses compare retailers that had offers in both October 2018 and October 2019 only. Also, in relation to Tasmania, the October 2018 bill calculation is based on Aurora Energy only while the October 2019 bill calculation is based on Aurora as well as 1st Energy (a relatively new market entrant in Tasmania).

**CHART 3 | Changes (\$)** to average annual electricity bills for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction from October 2018 to October 2019. GST inclusive.



In terms of percentage changes, Chart 4 shows that bills in NSW, Victoria, Queensland and South Australia had greater decreases than the average (-1%) during this period while.

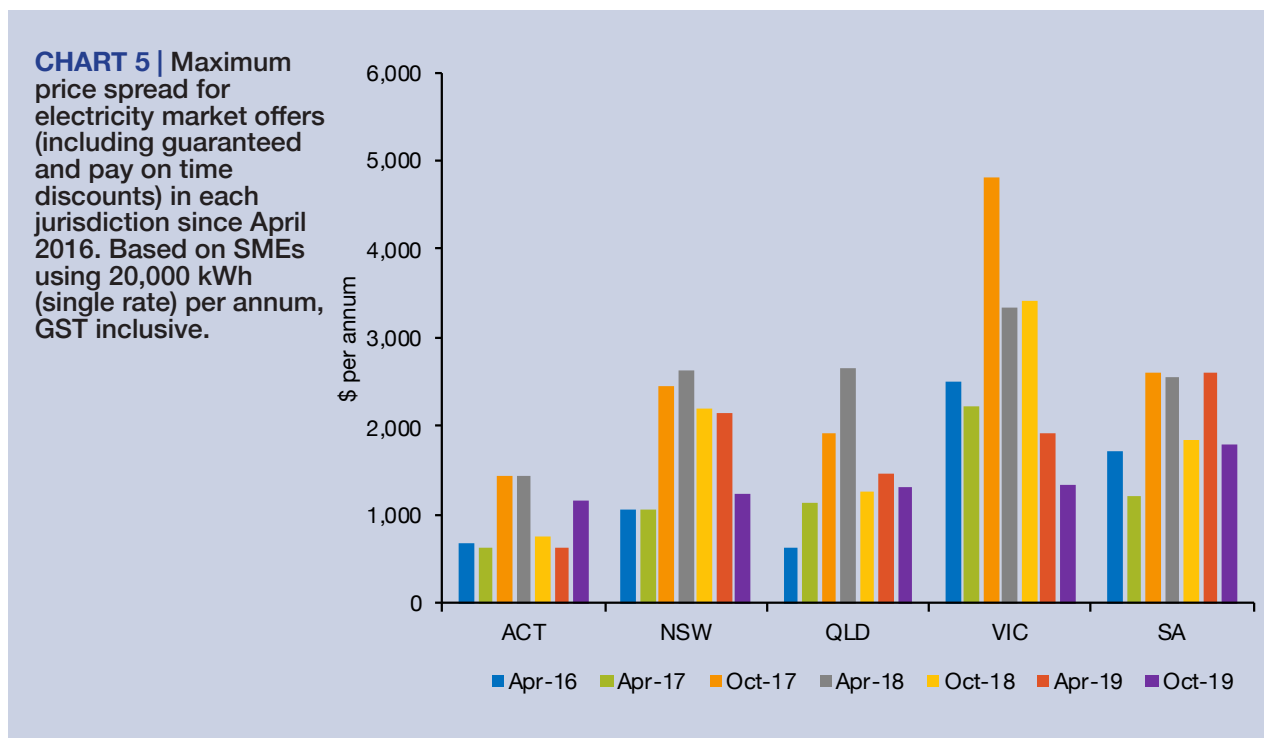
**CHART 4 | Increases (%)** in average electricity bills for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction from October 2018 to October 2019. GST inclusive.



### 3.1.1 Maximum price spread – electricity

The difference between the market offers, the maximum price spread, has significantly decreased in NSW, South Australia and Victoria while it has increased in the ACT. In October 2019 the maximum price spread in the ACT was \$1,165, \$1,230 in NSW, \$1,325

in South East Queensland, \$1,350 in Victoria and \$1,800 in South Australia.<sup>22</sup> Chart 5 shows the trend in the maximum price spread since April 2016 for all jurisdictions where a number of retailers offer electricity market contracts.



### 3.1.2 Additional discounts – electricity

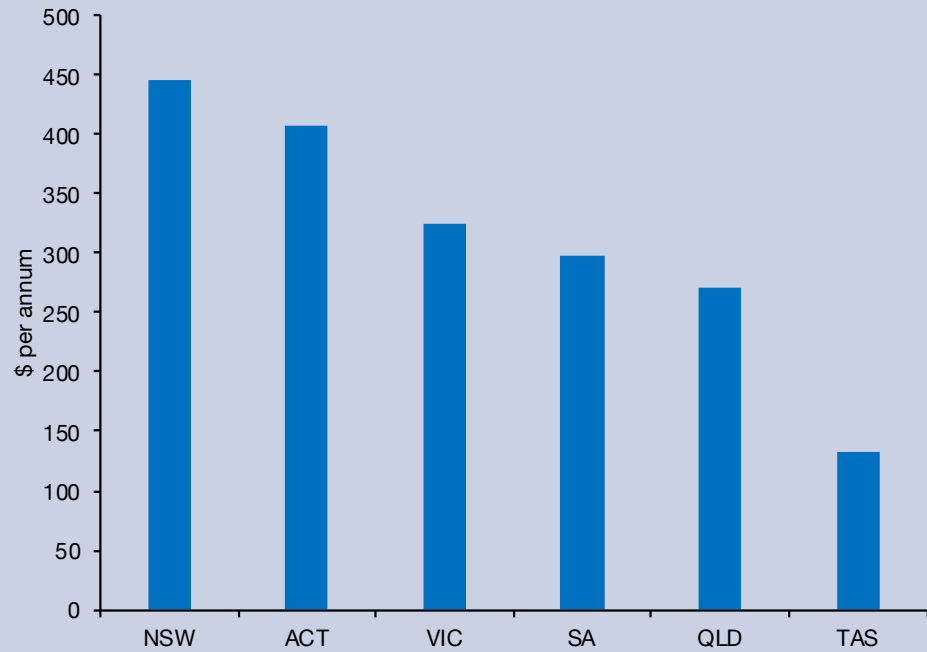
While some retailers offer guaranteed discounts others have discounts that are conditional upon bills being paid on time. Chart 6 shows the difference between the average market offer bill excluding guaranteed and conditional discounts, and the average market offer bill inclusive of discounts. It shows that discounts have the greatest impact in NSW (reduces a typical annual bill by approximately \$445) while they have the least impact in Tasmania (approximately \$130).<sup>23</sup> Compared to six months ago (April 2019), discounts have significantly reduced. In Victoria, for example, the difference between the average market offer bill excluding discounts, and the average market offer bill including discounts was \$1,450 in April 2019 compared to \$325 in October 2019.

<sup>22</sup> Based on annual consumption of 20,000 kWh and as of October 2019 the analysis is based on 6 retail offers in the ACT, 16 retailers South Australia, 18 in South East Queensland, 21 retailers in NSW and 22 in Victoria.

<sup>23</sup> Jurisdictions without market offers have not been included in this analysis. For Queensland, it is based on market offers in South East Queensland (Energex network) only.



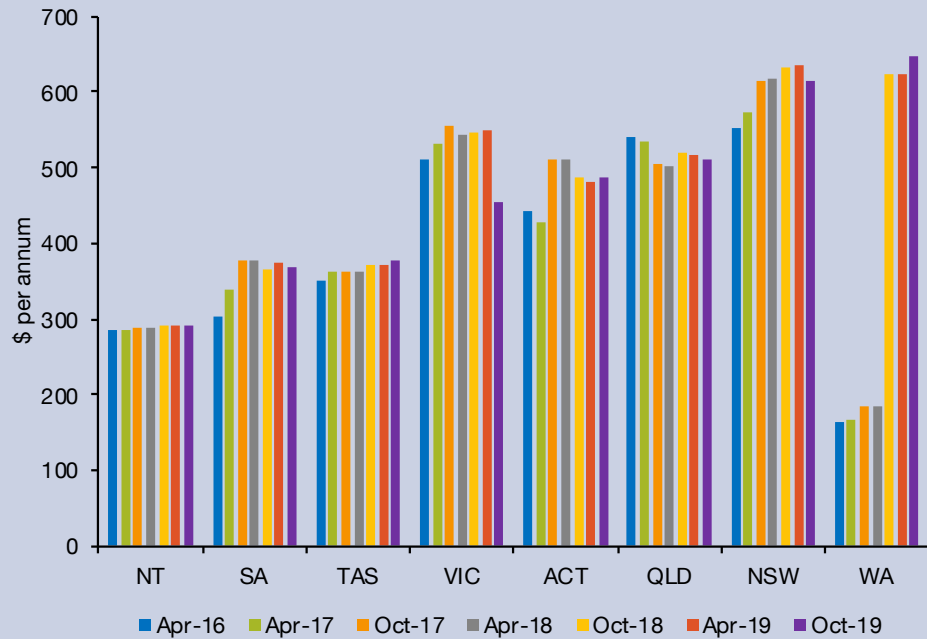
**CHART 6 |** Difference (\$) in average annual electricity bills inclusive and exclusive of discounts (guaranteed and conditional). Based on SMEs using 20,000 kWh (single rate) per annum, October 2019. GST inclusive



### **3.1.3 Fixed supply charge – electricity**

As of October 2019, fixed supply charges had decreased, or remained unchanged, in all jurisdictions except Tasmania and Western Australia (where they increased) compared with the same period a year ago. Western Australia used to have relatively low supply charges but in July 2018 it increased considerably (by \$440 per annum) and it is now the highest supply charge in the country (\$648 per annum). Fixed supply charges are \$613 in NSW (decrease of -3%), \$453 in Victoria (decrease of -17%), \$510 in Queensland (decrease of -2%), \$487 in the ACT (no change), \$378 in Tasmania (increase of 2%) and \$370 in South Australia (no change). The supply charge is lowest in the Northern Territory (\$292).

**CHART 7 |** Trend in average annual electricity supply charge (\$) for SMEs on the single rate in each jurisdiction from April 2016 to October 2019. GST inclusive.<sup>24</sup>



The supply charge as proportion of annual bills for SME customers using 20,000 kWh per annum has, however, remained stable or decreased in most jurisdictions over this period (Western Australia is the exception). Fixed supply charges as a proportion of the annual bill are currently highest in NSW and Western Australia (10%) and lowest in South Australia and the Northern Territory (5%). Chart 8 shows the trend in the average electricity supply charge as proportion of bill in each jurisdiction.

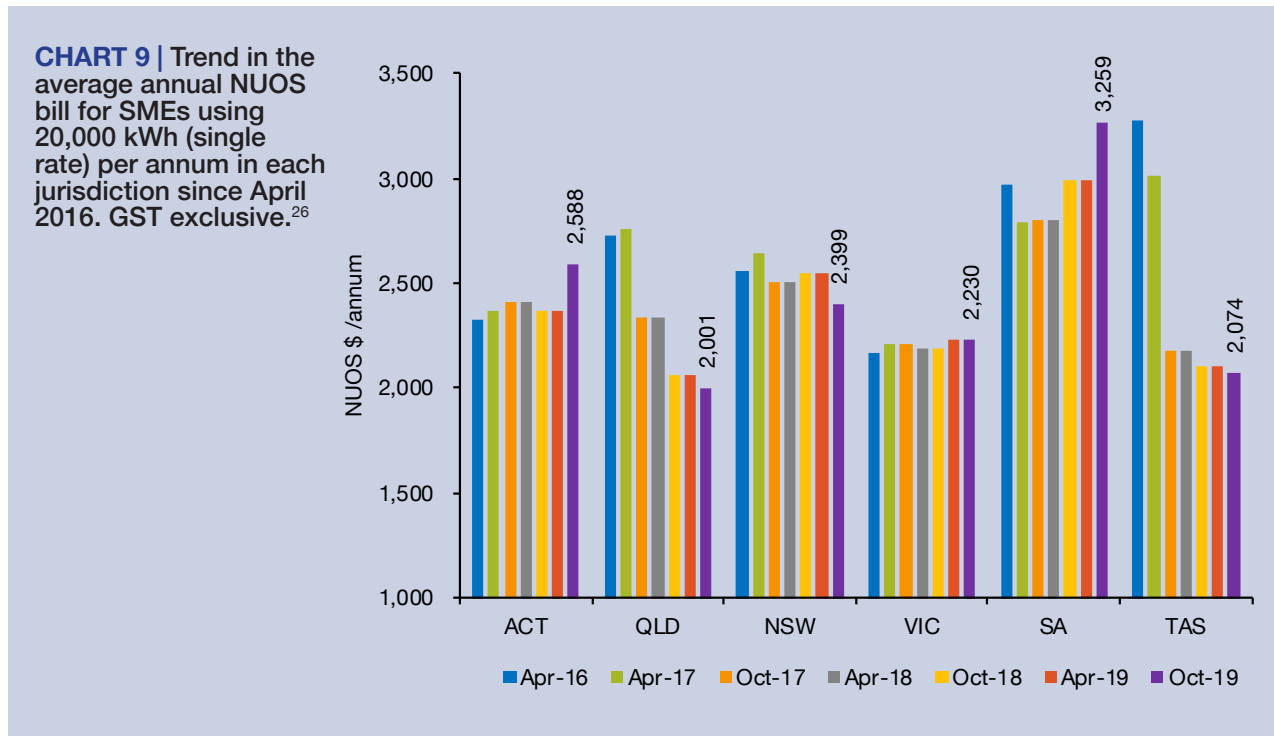
**CHART 8 |** Trend in average annual electricity supply charge as proportion (%) of bill for SMEs using 20,000 kWh per annum (single rate) in each jurisdiction from April 2016 to October 2019. GST inclusive.



<sup>24</sup> Based on the average annual supply charge for electricity market offers except for in WA, NT, Tasmania and Northern Queensland (Ergon Energy network) where it is based on the regulated rate.

### 3.1.4 Electricity network charges

Compared with the same period a year ago, the Network Use of System Charges (NUOS) decreased in NSW (-6%), South East Queensland (-3%) and Tasmania (-2%). In South Australia and the ACT, on the other hand, it increased by 9%. In Victoria, the increase is a more modest 2%. As of October 2019, South Australia is the jurisdiction with the highest NUOS charges (approximately \$3,260 for a SME consuming 20,000 kWh per annum) while Queensland has the lowest (approximately \$2,000 for the same consumption level).<sup>25</sup>

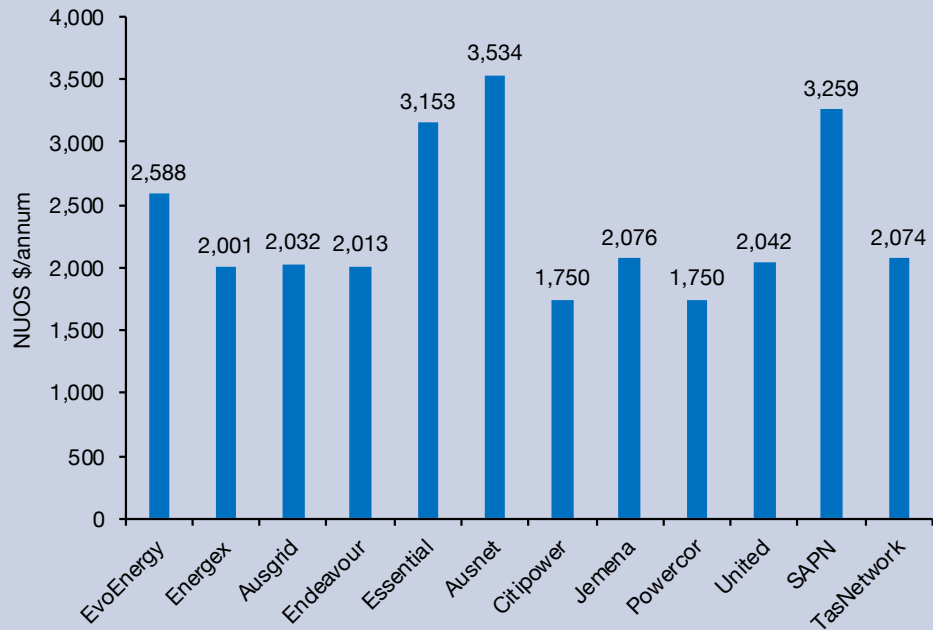


In NSW and Victoria, where there is more than one network area, the state variations in NUOS charges are significant. Large, and predominantly country networks, such as Essential Energy in NSW and Ausnet Services in Victoria have network charges that are similar to that of the South Australia Power Network (SAPN). Victoria's urban Citipower and Powercor (suburban and rural) networks, on the other hand are the networks with the lowest NUOS charges in the National Electricity Market (NEM). See Chart 10.

<sup>25</sup> Based on annual consumption of 20,000 kWh.

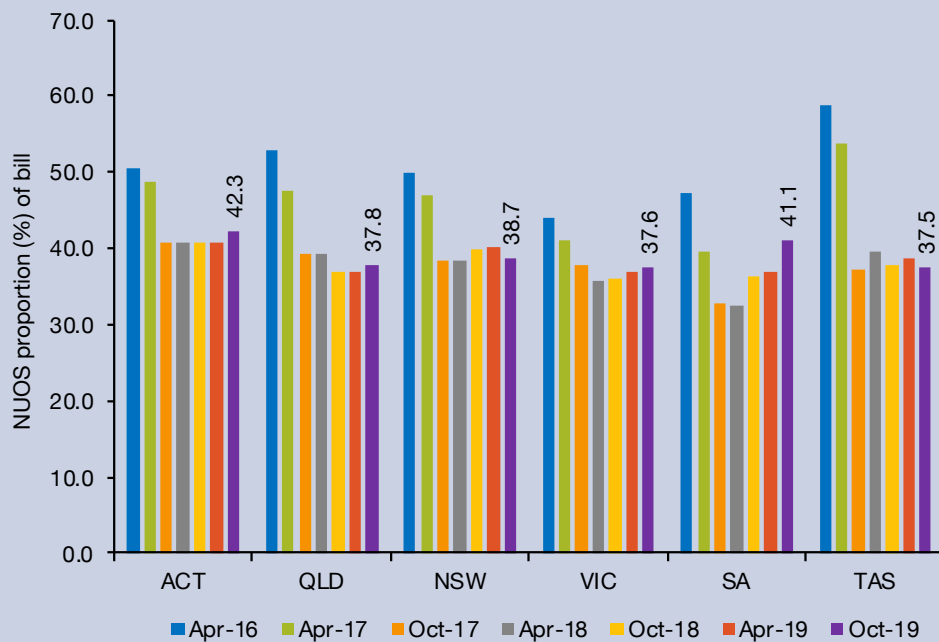
<sup>26</sup> Queensland is based on Energex network only.

**CHART 10 | Annual NUOS bill for SMEs using 20,000 kWh (single rate) per annum in each network as of October 2019. GST exclusive.<sup>27</sup>**



Since April 2016 (when this SME Retail Tariff Tracker project commenced) there was first a trend decline in NUOS as proportion of the total retail bill in all jurisdictions. As of October 2019, however, there is an increase in the NUOS proportion in all NEM jurisdictions except NSW and Tasmania. In October 2019 the NUOS proportion of bills was highest in the ACT and South Australia (42.3% and 41.1%, respectively). See Chart 11.

**CHART 11 | NUOS as proportion of total annual electricity bill for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction since April 2016. Total retail bill is GST inclusive.<sup>28</sup>**



<sup>27</sup> NUOS bills are based on the fixed supply charge and usage charges only and do not include separately listed metering charges.

<sup>28</sup> Total retail bill based on average market offer including guaranteed and pay on time discounts. Note that Queensland is based on the Energex network only.

### 3.1.5 Electricity ‘bill-stacks’

In the preceding section we estimated the proportion that network charges make up in the retail bill. The Australian Energy Market Commission (AEMC) annually publishes estimates of the components of the residential retail bill. We have undertaken a similar breakdown for the SME retail bill, but this needs to be qualified by the availability of public data to accurately estimate wholesale costs.

In order to estimate the what retailers currently pay for wholesale energy we have used the average for 2018/19 and 2019/20 presented in AEMC’s price trend databook.<sup>29</sup>

**TABLE 2 | AEMC estimated electricity wholesale costs 2018/19 and 2019/20**

	2018/19 \$/MWh	2019/20 \$/MWh	Average
<b>ACT</b>	116.3	99.2	\$107.75 MWh
<b>NSW</b>	116.8	99.2	\$108.00 MWh
<b>Queensland</b>	88.8	66.4	\$77.60 MWh
<b>South Australia</b>	171.1	150.7	\$160.90 MWh
<b>Tasmania</b>	85.5	72.8	\$79.15 MWh
<b>Victoria</b>	114.1	103.7	\$108.90 MWh

The AEMC’s Electricity Price Trends databook is also the source used to estimate ‘green scheme’ costs.<sup>30</sup> Table 3 below shows AEMC’s estimated environmental costs for 2018/19 and 2019/20 as well as the 2019 average “green schemes” costs used for this analysis.

**TABLE 3 | AEMC estimated ‘Green scheme’ costs (c/kWh) 2018/19 and 2019/20**

	2018/19 c/kWh	2019/20 c/kWh	Average
<b>ACT</b>	3.05	4.19	3.6 c/kWh
<b>NSW</b>	1.99	2.02	2.0 c/kWh
<b>Queensland</b>	1.62	1.47	1.5 c/kWh
<b>South Australia</b>	3.13	3.07	3.1 c/kWh
<b>Tasmania</b>	2.03	2.29	2.2 c/kWh
<b>Victoria</b>	2.33	2.17	2.3 c/kWh

By deducting estimated GST, NUOS costs, wholesale costs and the cost of environmental policies (‘green schemes’), the residual retail component of the average market offer bill is shown in Chart 12. This component is as low as \$99 in the ACT and as high as \$943 in Tasmania.<sup>31</sup>

<sup>29</sup> AEMC, 2018 Residential Electricity Price Trends (EPR0064), Databook available at <https://www.aemc.gov.au/market-reviews-advice/residential-electricity-price-trends-2018>

<sup>30</sup> See AEMC, 2018 Residential Electricity Price Trends (EPR0064), Databook available at <https://www.aemc.gov.au/market-reviews-advice/residential-electricity-price-trends-2018>

<sup>31</sup> Note that the retail component is the residual amount after deducting other costs from the bills. All market offers are inclusive of any guaranteed or pay on time discount offered by the retailers. We have also been advised that the NUOS includes some ‘green scheme’ costs in the ACT

**CHART 12 |** Estimated cost components of annual electricity bill for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction in October 2019. Total retail bill is GST exclusive.<sup>32</sup>

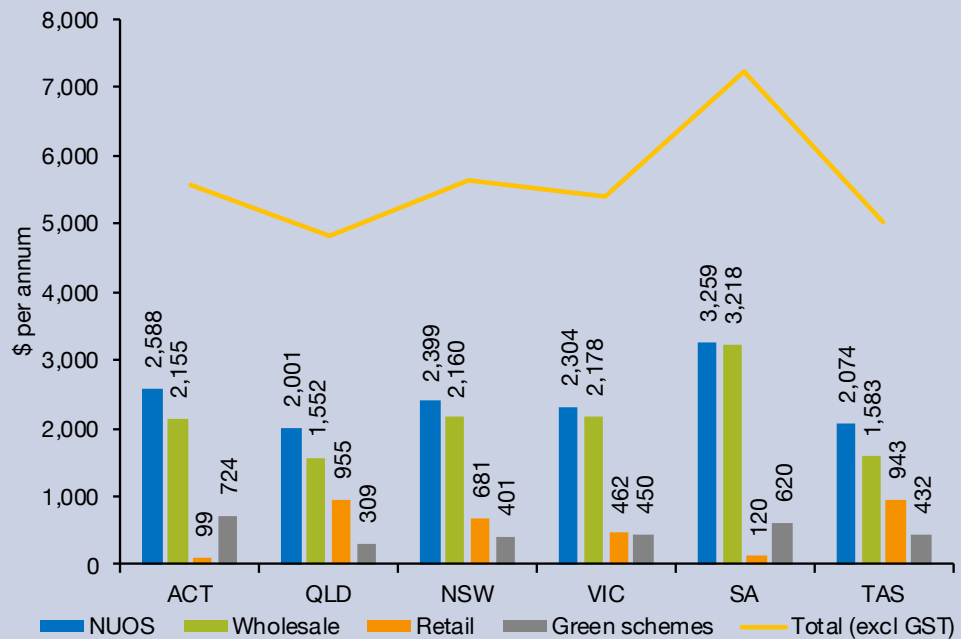
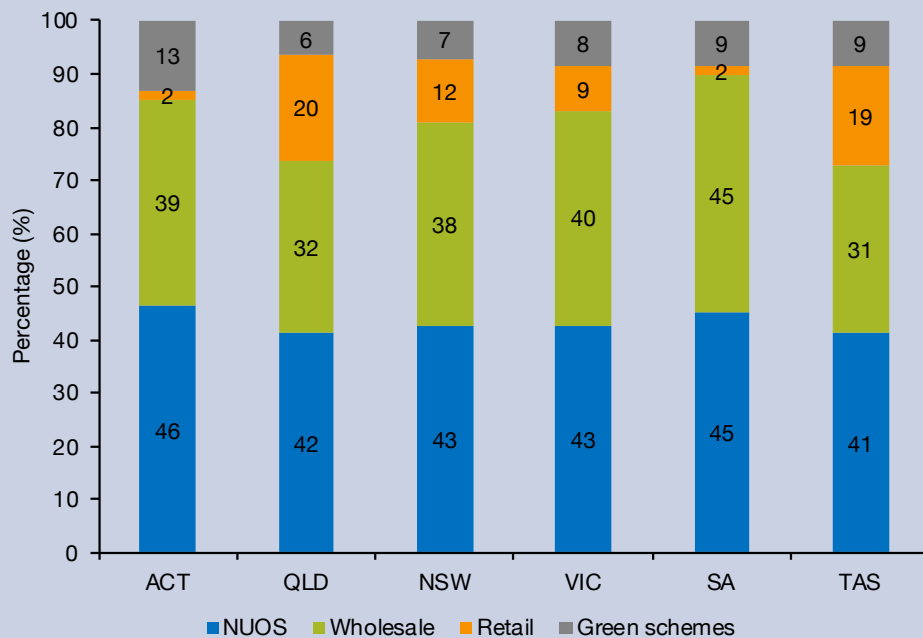


Chart 13 shows the bill components as a percentage of the total bill. It shows that the NUOS component of a retail bill (exclusive of GST) is 41-46%. The cost of wholesale energy ranges from 31% in Tasmania to 45% in South Australia. The residual retail component also varies significantly. It is as low as 2% in the ACT and as high as 19% in Tasmania. The ‘green scheme’ component is highest in the ACT (13%) and lowest in South East Queensland (6%).

**CHART 13 |** Estimated bill-stack proportions of annual electricity bill for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction in October 2019. Total retail bill is GST exclusive.<sup>33</sup>



<sup>32</sup> The NUOS does not include separately listed standard metering charges but the cost of rolling out smart meters in Victoria is included. Note that for simplicity, the Victorian NUOS charge includes the cost of rolling out smart-meters (\$74 on average) and that this charge is not included in the NUOS analysis in section 3.1.4 above. To estimate the impact of the Victorian smart meter rollout on the bill-stack, we used AER’s indicative average annual metering bill for 2019. See table 1-2 in AER, *Advanced Metering Infrastructure, Transition charges applications*, Final Decision (December 2016). The Queensland figures are based on the Energex network only.

<sup>33</sup> Total retail bill based on average market offer including guaranteed and pay on time discounts. Note that as these proportions are based on total retail bills exclusive of GST, the network proportion will be greater than in chart 11 which is based on bills inclusive of GST.

### **3.1.6 Impact of the Default Market Offer (DMO) and Victorian Default Offer (VDO)**

In October 2018 the Australian Treasurer and the Minister for Energy requested the Australian Energy Regulator (AER) develop a Default Market Offer (DMO) for each electricity network area in NSW, South Australia and South East Queensland.<sup>34</sup> This request was in response to recommendations outlined in the Australian Competition and Consumer Commission’s (ACCC) Retail Electricity Pricing Inquiry. The regulated DMOs took effect on 1 July 2019 and have replaced the retailer determined standing offers previously available in these networks.

The Victorian Default Offer (VDO) is a Victorian Government initiative that requires the Essential Services Commission (ESC) to set a VDO for basic metering types (single rate) in each network area. All retailers are required to offer the VDO but they can, and still do, offer other market contracts. The VDO took effect on 1 July 2019 and all small businesses previously on a retailer’s standing offer have been moved to the VDO.

On average, the DMO/VDO have lowered standing offer bills by approximately -27% in Victoria, -9% in NSW, -8% in South Australia and -6% in South East Queensland.<sup>35</sup> The below outlines decreases to standing offers post the DMO and VDO taking effect and further analysis on impacts and market changes are discussed under the jurisdictional analysis (Section 4).

#### **The Default Market Offer (DMO)**

The AER’s DMO is expressed as an annual bill for a set consumption level and retailers are still able to “translate the annual amount into different tariff structures”.<sup>36</sup> The Regulations stipulate that retailers must structure their prices to not exceed the annual DMO price for that consumption level.<sup>37</sup>

The DMO prices for single rate in NSW, South East Queensland and South Australia, as well as AER’s estimated median saving for customers on set consumption levels are listed in table 1 below.<sup>38</sup> There are no DMO prices for other tariff types (i.e. Time of Use, Demand tariffs) as the Regulations are designed to apply to the most common tariffs only.<sup>39</sup>

**TABLE 3 |** Small business DMO prices in NSW, South East Queensland and South Australia for 2019-20 (including GST)

	<b>Ausgrid</b>	<b>Endeavour Energy</b>	<b>Essential Energy</b>	<b>Energex</b>	<b>SAPN</b>
<b>SINGLE / FLAT RATE</b>					
Annual bill	\$7,371	\$6,204	\$8,045	\$6,025	\$9,120

<sup>34</sup> See <https://www.aer.gov.au/system/files/Letter%20to%20the%20AER%20Chair%20-%20default%20pricing.pdf>

<sup>35</sup> Based on the ‘big 3’ retailers’ standing offers prior to DMO/VDO taking effect and small businesses consuming 20,000 kWh per annum.

<sup>36</sup> AER, Default Market Offer Prices 2019-20, Final Determination, April 2019, 9

<sup>37</sup> Ibid., 9

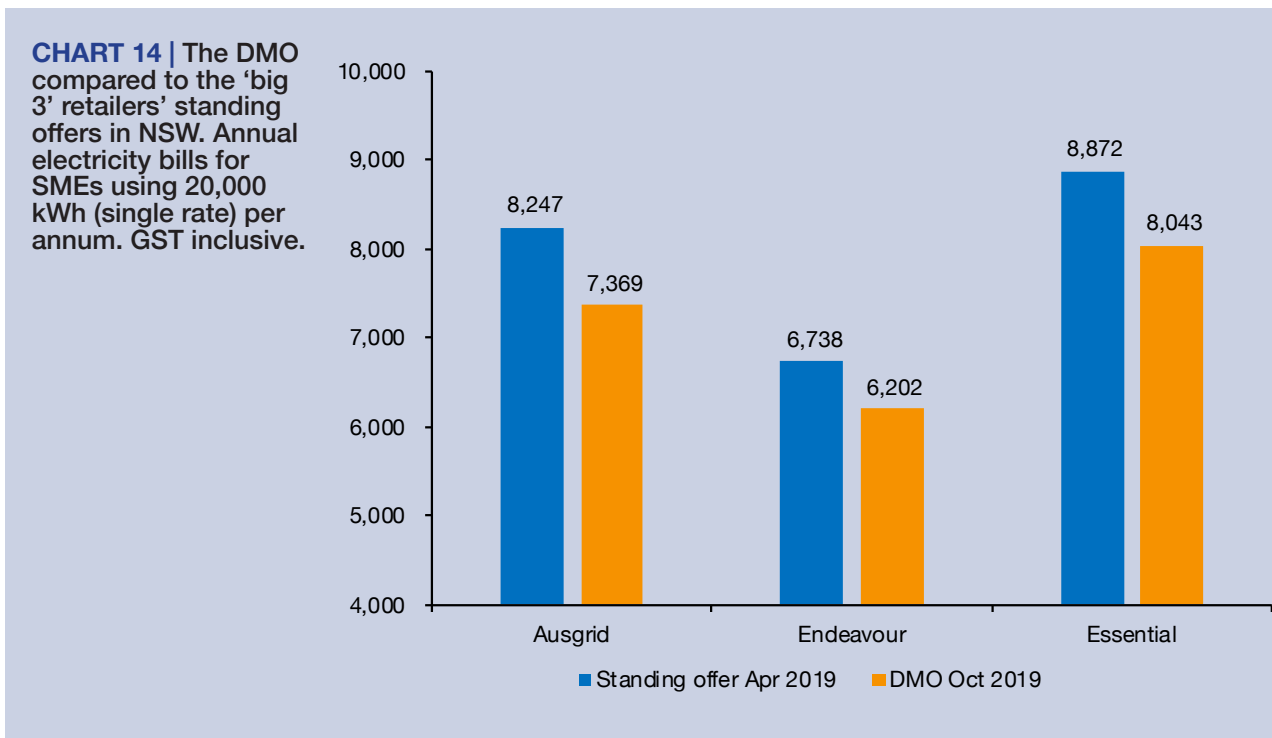
<sup>38</sup> Ibid., 8

<sup>39</sup> Ibid., 22

	Ausgrid	Endeavour Energy	Essential Energy	Energex	SAPN
<b>Saving from median offer*</b>	\$878	\$579	\$709	\$457	\$896
<b>Consumption level</b>	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum

\*Median saving is the difference between the median standing offer and the DMO price in that distribution zone, based on the model annual usage.

In NSW, the DMO produces significantly lower bills compared to AGL, Energy Australia and Origin Energy’s standing offers prior to 1 July 2019. Chart 14 compares the DMO to the ‘big 3’ retailers’ average standing offers in each network area.<sup>40</sup> In the Ausgrid network the DMO is -11% less than the average standing offer, in Endeavour Energy it is -8% less and bills are down by -9% in Essential Energy.

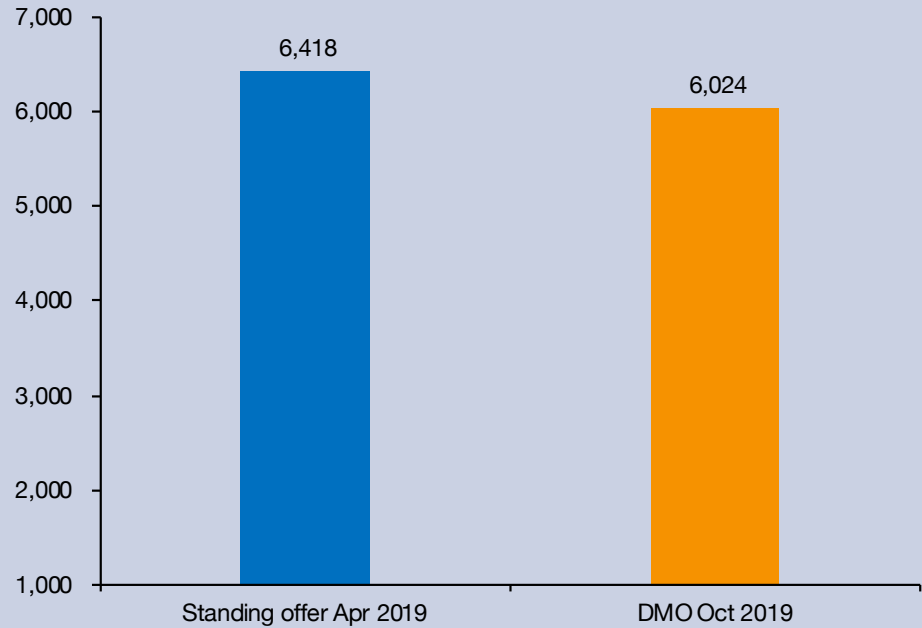


In South East Queensland, the DMO produces an annual bill that is -6% less than the ‘big 3’ retailers’ average standing offer.

<sup>40</sup> The ‘big 3’ retailers are AGL, Energy Australia and Origin Energy.

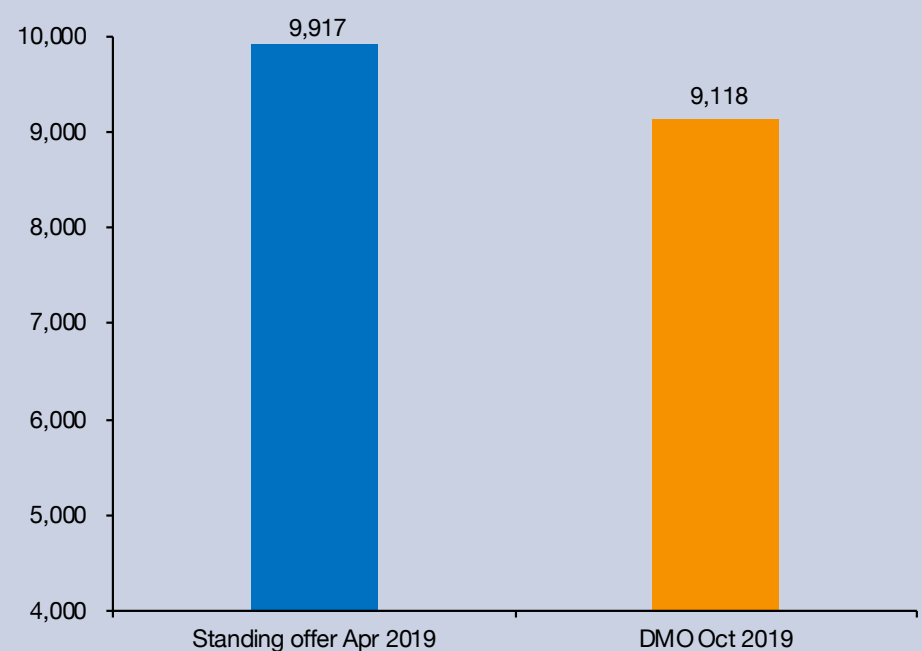


**CHART 15** | The DMO compared to the 'big 3' retailers' standing offers in South East Queensland (Energex network). Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



In South Australia, the DMO produces an annual bill that is -8% less than the 'big 3' retailers' average standing offer.

**CHART 16** | The DMO compared to the 'big 3' retailers' standing offers in South Australia (SA Power Networks). Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.

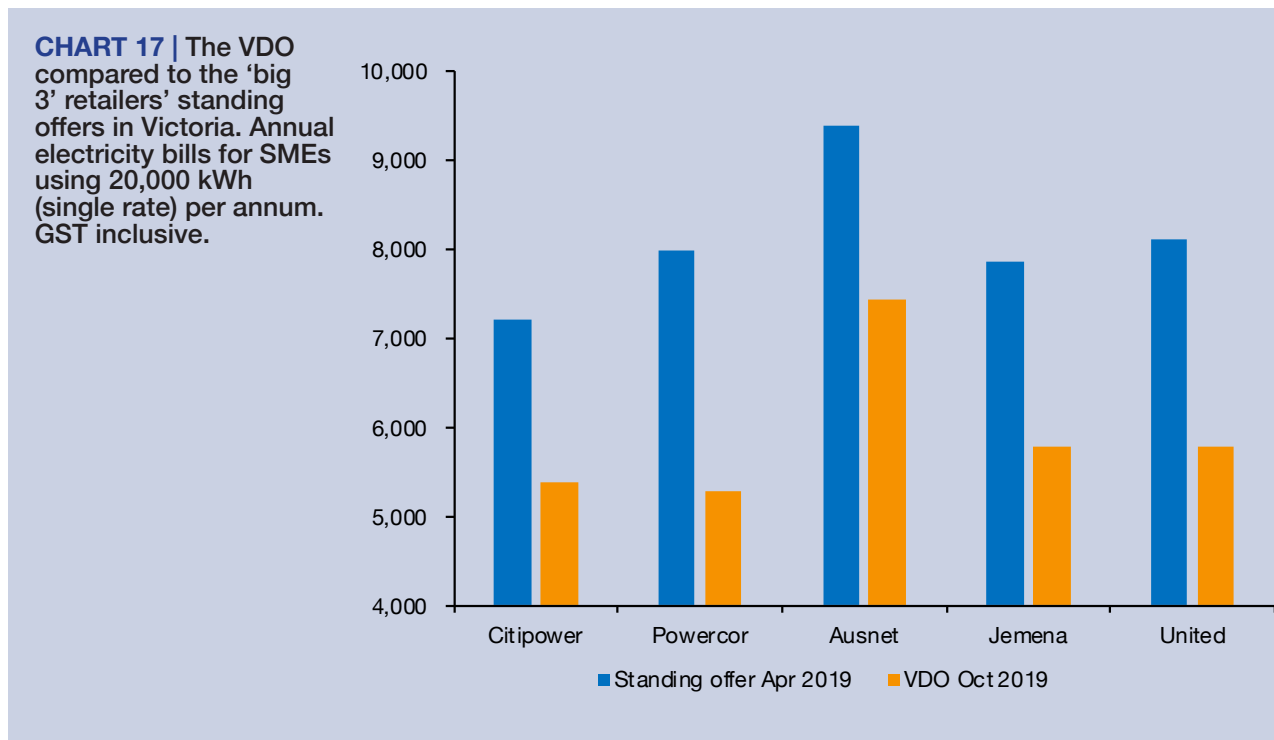


### Victorian Default Offer (VDO)

Chart 17 compares the VDO to the 'big 3' retailers' average standing offers in each of the five Victorian network areas.<sup>41</sup> In the Powercor network the VDO is -34% less than the average standing offer in place prior to the VDO taking effect. In the Ausnet Services

<sup>41</sup> The VDO only applies to the single rate tariff. For customers on a two-rate (peak/off-peak) tariff, a time of use (TOU) tariff or a demand tariff, the retailers continue to set the standing offer price.

network bills are reduced by -21%, in Jemena they are down by -26%, in Citipower they are down by -25% and in United Energy bills are down by -29%.



### 3.2 Gas bills

Chart 18 shows estimated annual gas bills for SMEs that consume 100 GJ per annum across all states and territories. Tasmanian businesses with this consumption level will have an annual gas bill of just under \$4,635, though this is understood to be a high level of use for a typical SME in Tasmania (with many using less). For this level of consumption Victorian businesses will pay approximately \$2,120.

**CHART 18 |** Estimated average annual gas bill for SMEs using 100 GJ per annum in each jurisdiction. Offers as of October 2019, GST inclusive.<sup>42</sup>

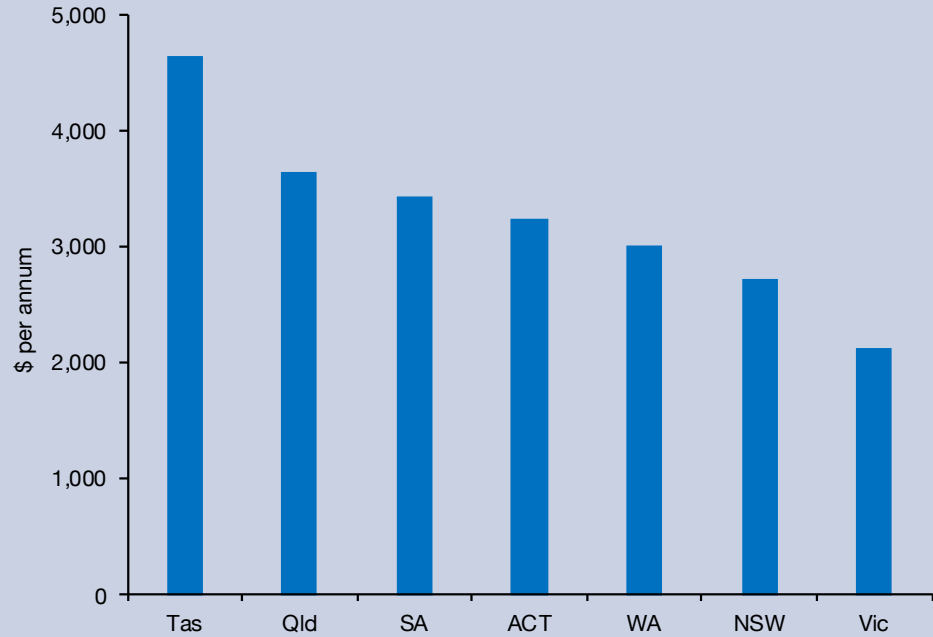
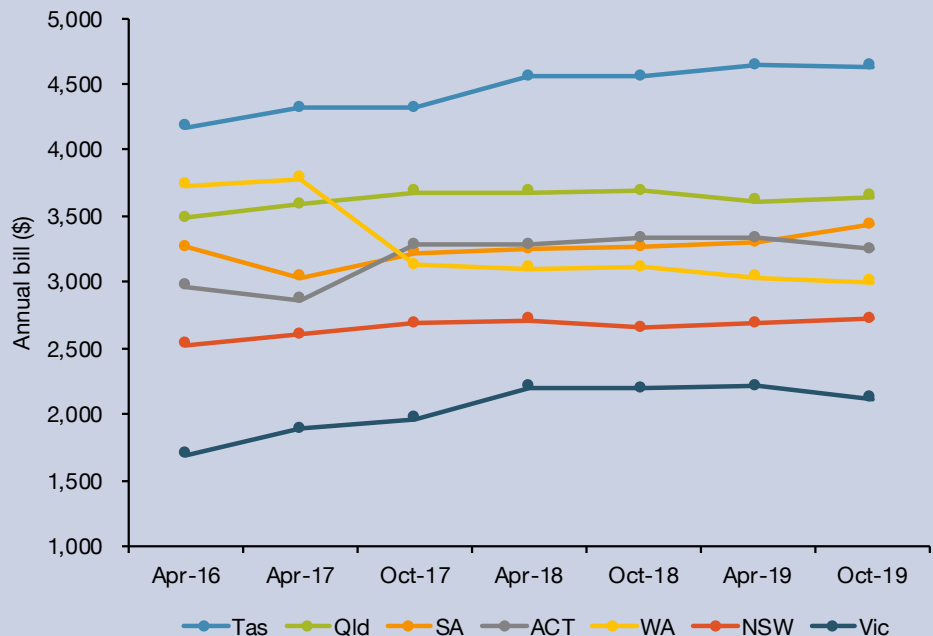


Chart 19 shows the trend in annual gas bills from April 2016 to October 2019. It shows that bills increased in all jurisdictions except for WA during the period but that the increases vary significantly between jurisdictions. SMEs in Victoria and Tasmania have experienced the greatest price increases.

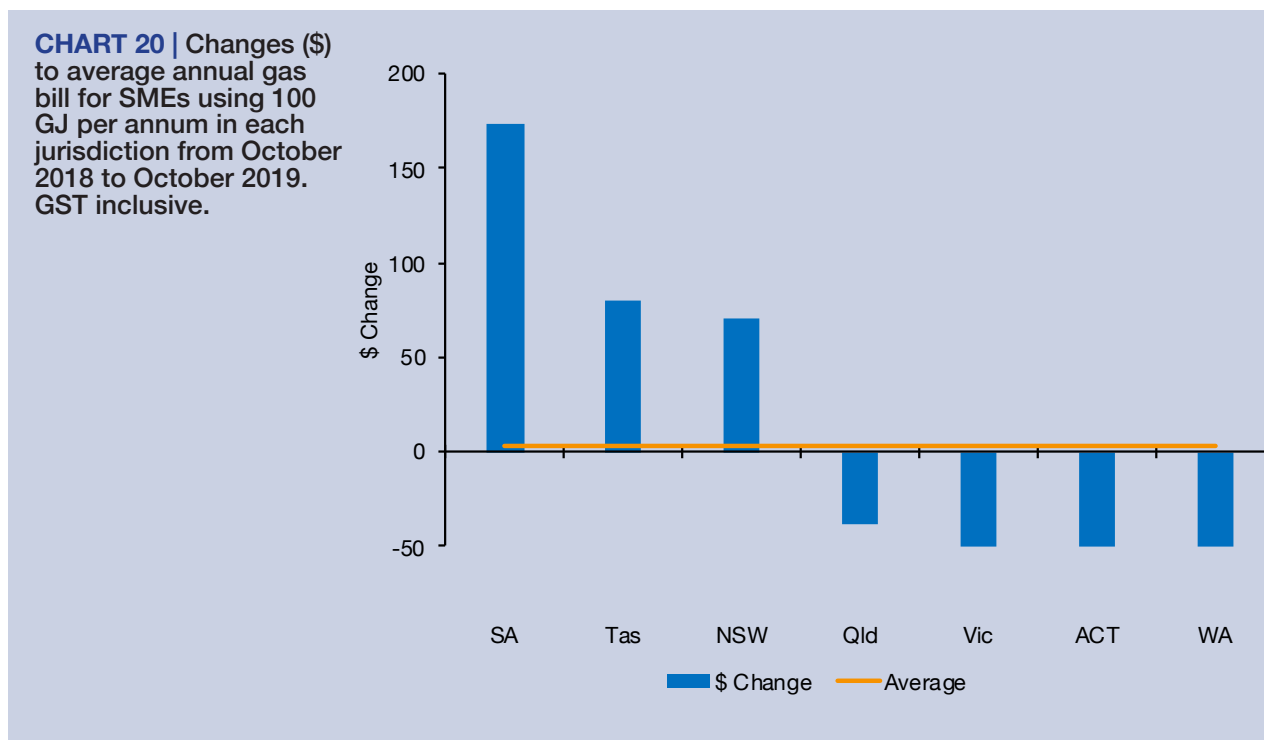
**CHART 19 |** Estimated average annual gas bills for SMEs using 100 GJ per annum in each jurisdiction since April 2016. GST inclusive.<sup>43</sup>



<sup>42</sup> Based on offers available in October 2019. Average market offer (including guaranteed discounts and pay on time discounts). In QLD this is based on offers available in the Brisbane North and the Brisbane South pricing zones, in NSW it is based on offers available in the Sydney/Jemena zone, in Victoria it is based on the eight major gas zones, and in WA it is based on the South West zone. Tasmania and SA only have one pricing zone.

<sup>43</sup> Average market offer (including guaranteed discounts and pay on time discounts) for each jurisdiction. In QLD this is based on offers available in the Brisbane North and the Brisbane South pricing zones, in NSW it is based on offers available in the Sydney/Jemena zone, in Victoria it is based on the eight major gas zones, and in WA it is based on the South West zone. Tasmania and SA only have one pricing zone.

Chart 20 shows \$ change to annual bills from October 2018 to October 2019. On average, nationally, gas bills did not change between October 2018 and October 2019. Annual gas bills for South Australian SMEs with this consumption level (100 GJ), however, increased by approximately \$175 (5%). In Queensland, Victoria, the ACT and Western Australia, on the other hand, they have decreased.



### **3.2.1 Maximum price spread – gas**

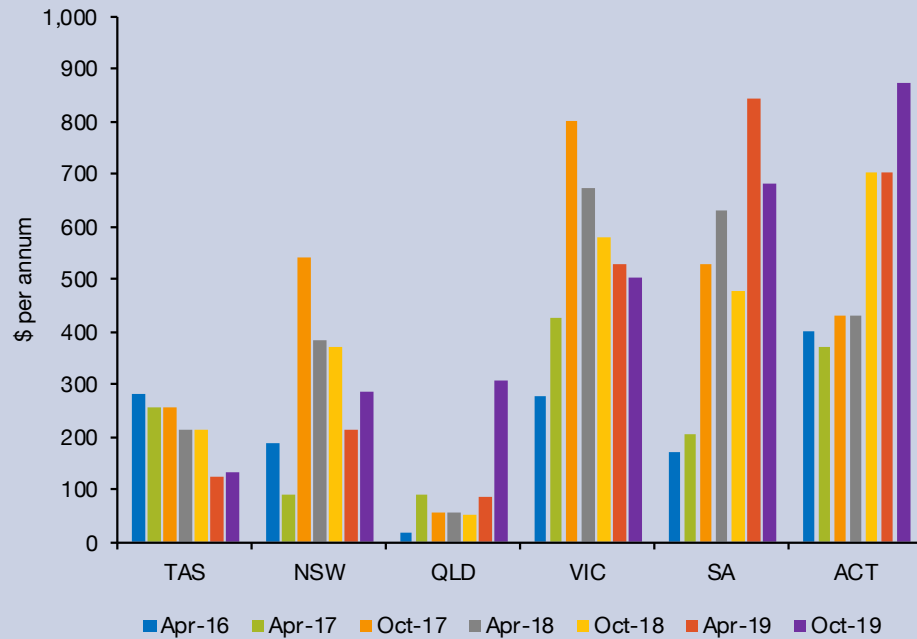
The difference between the gas market offers, the maximum price spread, decreased in Tasmania, NSW and Victoria, compared with the same period a year ago. For South Australia, the ACT and Queensland, on the other hand, the price spread has increased. In previous years, the price spread has typically increased with the number of retailers operating in a market as well as immediately after deregulation.<sup>44</sup> Currently, however, the ACT has the greatest price spread (\$875) despite there only being three retailers offering gas contracts in the ACT.<sup>45</sup> As of October 2019, the maximum price spread was \$685 in South Australia, approximately \$505 in Victoria, \$305 in Queensland and \$285 in NSW. In Tasmania, the maximum price spread was \$130.<sup>46</sup> Chart 21 shows the trend in the maximum price spread since April 2016 for all jurisdictions where a number of retailers offer gas market contracts.

<sup>44</sup> Note that NSW gas retail prices were deregulated on 1 July 2017.

<sup>45</sup> ActewAGL does not offer any discounts on their standard gas offer. Customers that sign up for a dual fuel contract, however, do receive a discount.

<sup>46</sup> Based on annual consumption of 100,000 MJ and analysis based on 11 retail offers in Victoria, 7 retailers in NSW, 6 in South Australia, 3 in the ACT and 2 retailers in Tasmania and Queensland. Analysis does not include WA as AGL and Origin are relatively new entrants in the WA gas retail market. As of October 2019, however, the maximum price spread in WA was \$1,730.

**CHART 21 |** Trend in the maximum price spread for gas market offers (including guaranteed and pay on time discounts) in each jurisdiction since April 2016 based on SMEs using 100 GJ per annum. GST inclusive.

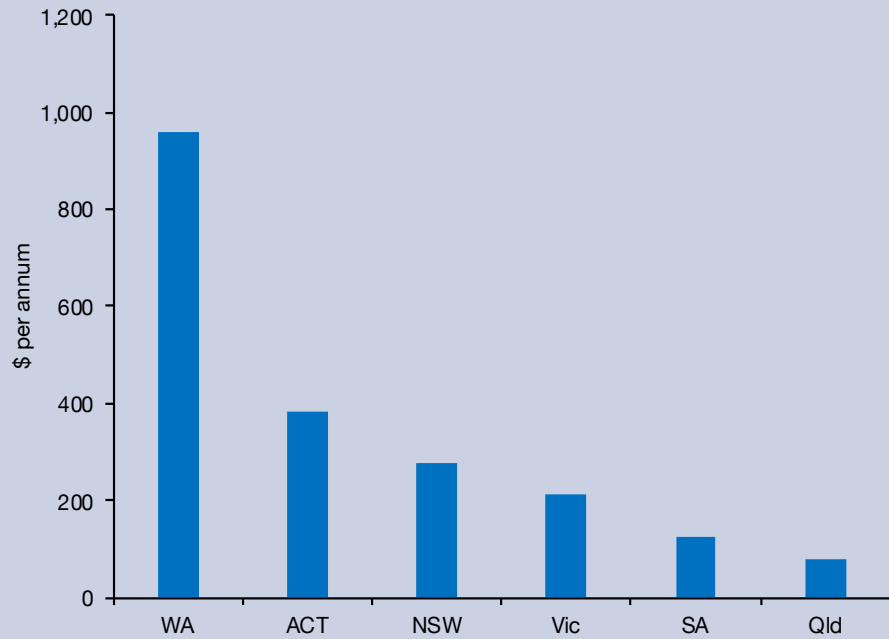


### 3.2.2 Additional discounts – gas

While some retailers offer guaranteed discounts, many discounts are conditional upon bills being paid on time. Chart 22 shows the difference between the average market offer bill excluding guaranteed and conditional discounts, and the average market offer bill inclusive of discounts. It shows that discounts have greatest impact in Western Australia (reduces an average annual bill by \$960) while they have the least impact in Queensland and South Australia (approximately \$80 and \$125 respectively).<sup>47</sup> It should be noted, however, that Western Australia only has three retailers that publish SME market offers and that this discount reflects the 45% discount offered by AGL and 30% discount offered by Origin Energy. Both retailers are relatively new entrants in the WA gas retail market. Compared to six months ago (April 2019), discounts have significantly reduced. In NSW, for example, the difference between the average market offer bill excluding guaranteed and conditional discounts, and the average market offer bill inclusive of discounts was \$545 in April 2019 compared to \$275 in October 2019.

<sup>47</sup> Jurisdictions without or only a few market offers have not been included in this analysis.

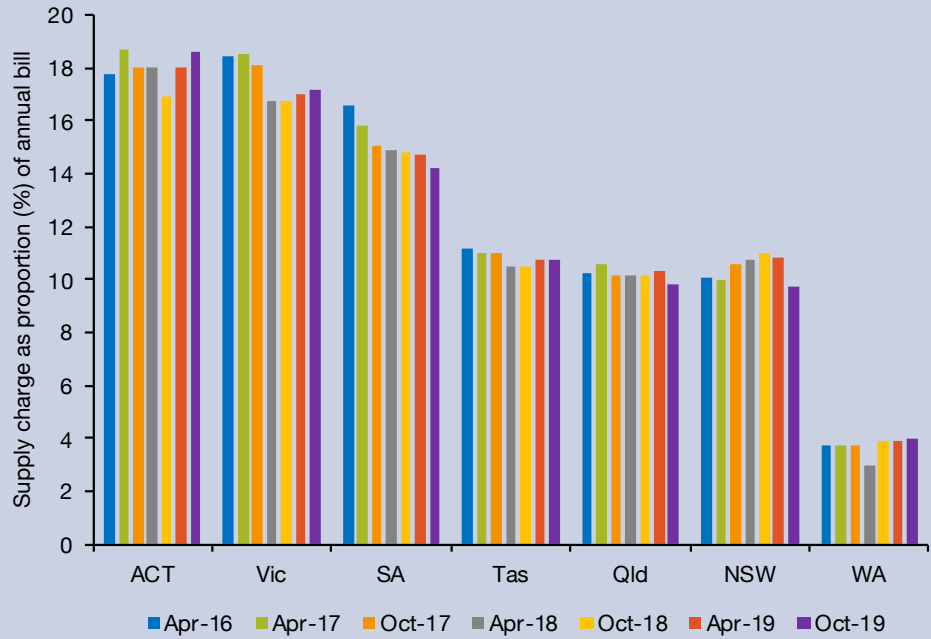
**CHART 22 |** Difference (\$) to average annual gas bill inclusive and exclusive of discounts) guaranteed and conditional), based on SMEs using 100 GJ per annum, October 2019. GST inclusive.



### **3.2.3 Fixed supply charge – gas**

For gas, there are significant differences between jurisdictions. Compared with the same period a year ago, the highest increases in fixed supply charges were in the ACT (an increase of 7% to \$605 per annum) and Tasmania (an increase of 4% to \$500). In South Australia, there has been a small increase (1% to \$490). In NSW and Queensland, the supply charges decreased while the supply charges remained stable in Victoria and Western Australia. Fixed supply charges as a proportion of the annual bill are highest in the ACT and Victoria (19% and 17%) and lowest in Western Australia (4%).

**CHART 23 |** Trend in average annual gas supply charge (\$) for SMEs in each jurisdiction from since April 2016. GST inclusive.<sup>48</sup>



**CHART 24 |** Trend in average annual gas supply charge as proportion (%) of bill for SMEs using 100 GJ per annum in each jurisdiction from April 2016 to October 2019. GST inclusive.



<sup>48</sup> Based on the average supply charge for electricity market offers. In WA, Alinta Energy and AGL's supply charges are inclusive of a daily Account Administration Fee as of April and October 2019. In the April 2018 update, only Alinta explicitly stated that an Account Administration Fee applies. Origin's offers in WA do not mention this fee.

## 4. Jurisdictional analysis

This section analyses and compares electricity and gas offers available to small business customers in each of the jurisdictions. It compares price spreads (maximum price differences between retail offers), the impact guaranteed and conditional pay on time discounts have on energy bills, and the network cost as proportion of total electricity bills. It also highlights price changes (increases and/or decreases) that have occurred over both a six month and twelve month period to October 2019,<sup>49</sup> differences to annual bills (based on assumed consumption levels) between retailers, as well as electricity networks and gas pricing zones within each jurisdiction.<sup>50</sup>

Consistent with section 3 above, we assume an annual consumption level of 20,000 kWh<sup>51</sup> (single rate) for electricity and 100 GJ for gas. We stress that gas consumption varies significantly between jurisdictions and that the 100 GJ consumption level is a low consumption level in Victoria, medium in the ACT and South Australia, and high in Queensland. We note that the workbooks accompanying this report allow users to nominate their own consumption levels and we encourage all stakeholders to access the workbooks at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

### 4.1 New South Wales

Electricity retail prices in NSW have been deregulated since 2014 but on 1 July 2019 the Australian Energy Regulator's Default Market Offer (DMO) replaced the previously retailer determined electricity standing offers in NSW. Gas retail prices for customers using less than 1,000 GJ per annum became deregulated in July 2017.

NSW has three electricity networks and several gas pricing zones:

Electricity network and incumbent retailer	
<b>Ausgrid (Energy Australia)</b>	Inner Sydney, Northern Sydney, Swansea, Newcastle, Maitland, Cessnock, Singleton and Upper Hunter
<b>Endeavour Energy (Origin)</b>	Western Sydney, Wollongong, Blue Mountains, Lithgow, Kandos, Moss Vale, Nowra, Ulladulla
<b>Essential Energy (Origin)</b>	Rural and Regional NSW

<sup>49</sup> As the last data collection of retail offers occurred in October 2019, offers as of October 2019 have been compared to offers in April 2019 (the previous data collection), and the trend over the twelve months since October 2018. As the electricity Network Use of System (NUOS) charges change on 1 January in Victoria and on 1 July in all other jurisdictions, the April data, and associated report, will typically reveal recent price changes in Victoria while the October data (and report) will highlight major price changes in the other jurisdictions.

<sup>50</sup> Appendix A contains a list of the various retail offers used for this analysis.

<sup>51</sup> This consumption level for electricity is based on the NEM average, see Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)



## NSW Gas zones and incumbent retailers

<b>Jemena Sydney (AGL)</b>	Sydney, Newcastle, Wollongong, Blue Mountains
<b>AGN (Origin)</b>	Cooma and Bombala
	Temora, Holbrook, Henty, Culcairn and Walla Walla
	Tumut and Gundagai
	Wagga Wagga and Uranquity
	Albury, Moama and Jindera
	Murray Valley Towns
<b>Central ranges (Origin)</b>	Tamworth
<b>Jemena/Capital Region (ActewAGL)</b>	Boroowa, Goulburn, Yass and Young
<b>Queanbeyan (ActewAGL)</b>	Queanbeyan and Bundgendore
<b>Shoalhaven (ActewAGL)</b>	Shoalhaven

### 4.1.1 NSW electricity bills October 2019

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>52</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Ausgrid network is 13,000 kWh per annum while the average consumption is 27,266 kWh in the Endeavour Energy network. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

#### **The price-spread**

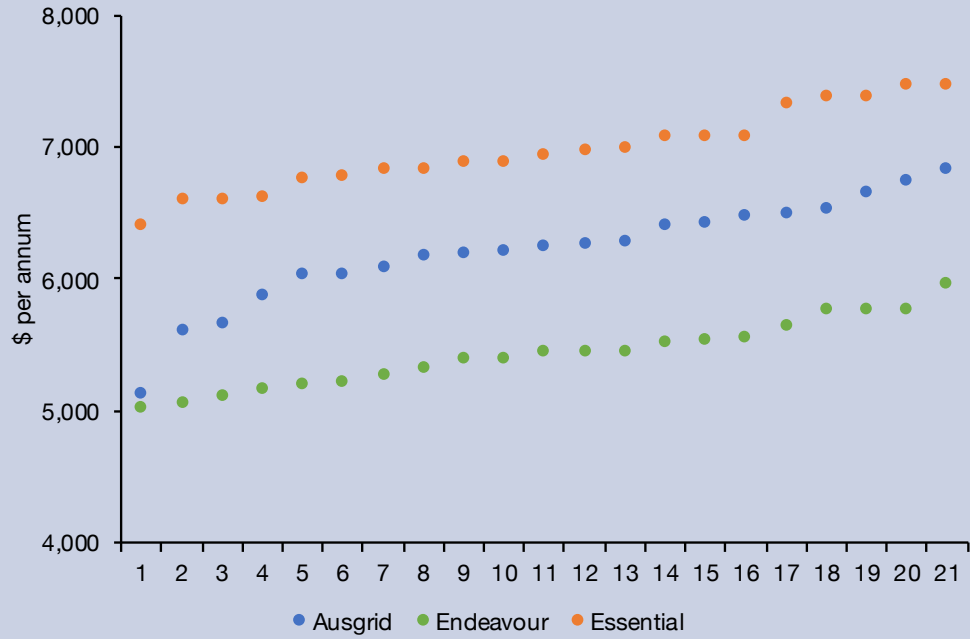
Chart 25 shows annual bills for SMEs consuming 20,000 kWh per annum (single rate) for 21 retailers across the three NSW distribution networks.<sup>53</sup> It shows that the typical annual bill for SMEs with his consumption level is between \$5,435 and \$6,970 (depending on network area).

It also shows that prices are highest in the Essential Energy network and lowest in Endeavour Energy. The maximum price spread is greatest in Ausgrid where the difference between the lowest and the highest annual bill is \$1,670 compared to \$940 in the Endeavour Energy network. The average maximum price spread for all three networks is approximately \$1,230.

<sup>52</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

<sup>53</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.












**CHART 25 |** The price spread for each of the three NSW distribution networks. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 20,000 kWh per annum, single rate and GST inclusive.




Figures 1 - 3 below rank the retail offers from lowest to highest annual electricity bills in each of the three network areas.<sup>54</sup>

<sup>54</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Bill calculations based on SMEs using 20,000 kWh/annum (single rate). All bills are inclusive of guaranteed and pay on time discounts as well as GST. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.


**FIGURE 1 |** Lowest to highest annual bills for market offers in NSW's **Ausgrid network** (October 2019)

	Powerclub	\$5,139
	Energy Locals	\$5,612
	Commander	\$5,668
	Simply Energy	\$5,874
	Powerdirect	\$6,042
	EnergyAustralia	\$6,042
	Alinta Energy	\$6,093
	Red Energy	\$6,174
	AGL	\$6,187
	Blue NRG	\$6,219
	Q Energy	\$6,252
	Powershop	\$6,263
	CovaU	\$6,280
	Click Energy	\$6,410
	Amaysim	\$6,429
	Origin Energy	\$6,485
	Future X Power	\$6,504
	Diamond Energy	\$6,536
	Momentum Energy	\$6,659
	Next Business Energy	\$6,748
	1st Energy	\$6,838

**FIGURE 2 |** Lowest to highest annual bills for market offers in NSW's **Endeavour Energy network** (October 2019)

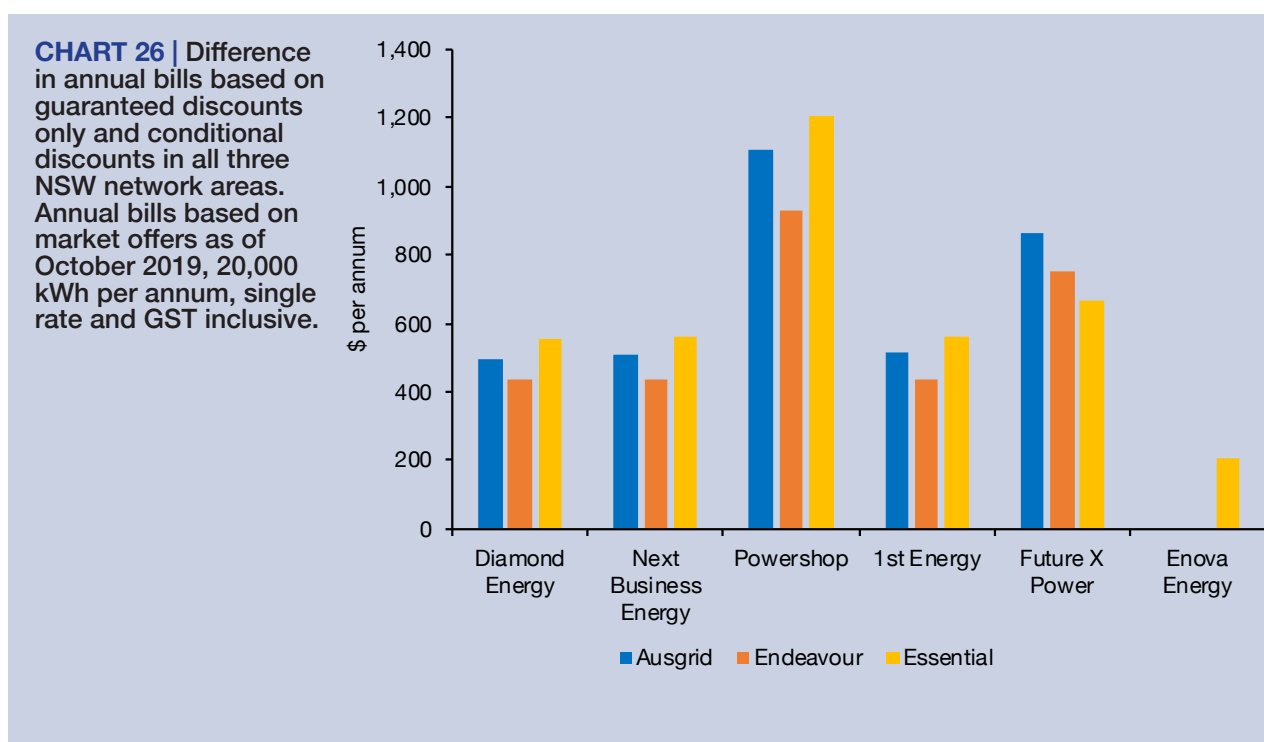
	Powerclub	\$5,024
	Commander	\$5,063
	Momentum Energy	\$5,115
	Red Energy	\$5,176
	Powerdirect	\$5,210
	Alinta Energy	\$5,224
	Powershop	\$5,271
	EnergyAustralia	\$5,334
	Click Energy	\$5,396
	Q Energy	\$5,404
	Future X Power	\$5,448
	AGL	\$5,456
	Origin Energy	\$5,459
	Energy Locals	\$5,517
	Blue NRG	\$5,547
	CovaU	\$5,554
	Simply Energy	\$5,644
	1st Energy	\$5,763
	Next Business Energy	\$5,766
	Diamond Energy	\$5,768
	Amaysim	\$5,961

**FIGURE 3 |** Lowest to highest annual bills for market offers in NSW's **Essential Energy network** (October 2019)

	Powerclub	\$6,407
	EnergyAustralia	\$6,595
	Commander	\$6,603
	Red Energy	\$6,620
	Powerdirect	\$6,756
	Momentum Energy	\$6,778
	Alinta Energy	\$6,833
	Powershop	\$6,835
	CovaU	\$6,882
	Blue NRG	\$6,886
	Energy Locals	\$6,937
	Amaysim	\$6,975
	Click Energy	\$6,998
	Origin Energy	\$7,078
	AGL	\$7,078
	Simply Energy	\$7,088
	Enova Energy	\$7,328
	Future X Power	\$7,378
	Diamond Energy	\$7,381
	1st Energy	\$7,461
	Next Business Energy	\$7,464

## Additional discounts

Six of the twenty-one retailers operating in NSW offer conditional pay on time discounts (down from ten in April 2019). For customers using 20,000kWh per annum the conditional discount can be worth up to \$1,205 (Powershop's offers in the Essential Energy network).<sup>55</sup> This is, however, significantly less than six months ago (April 2019) when the difference was almost \$3,000 per annum. Other retailers with conditional discounts are Diamond Energy, Next Business Energy, 1st Energy, Future X Power and Enova Energy. Chart 26 below shows the difference to annual bills that include guaranteed discounts only compared to annual bills that include conditional discounts (only retailers that offer conditional discounts are included in this Chart).

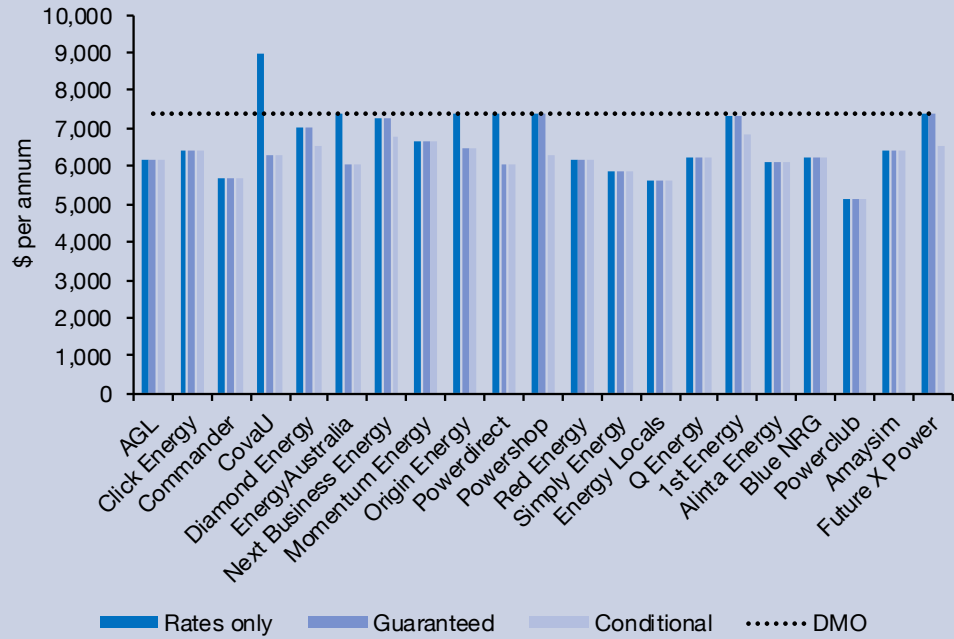


Charts 27 - 29 show annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts for all three network areas. It shows that four retailers, CovaU, Energy Australia, Origin Energy and Powerdirect, offer significant guaranteed discounts. These retailers, however, also have some of the highest base rates.<sup>56</sup> The charts also compare the market offers to the DMO and they show that none of the retailers have market offers (inclusive of guaranteed discounts) that produce bills that are higher than the DMO.

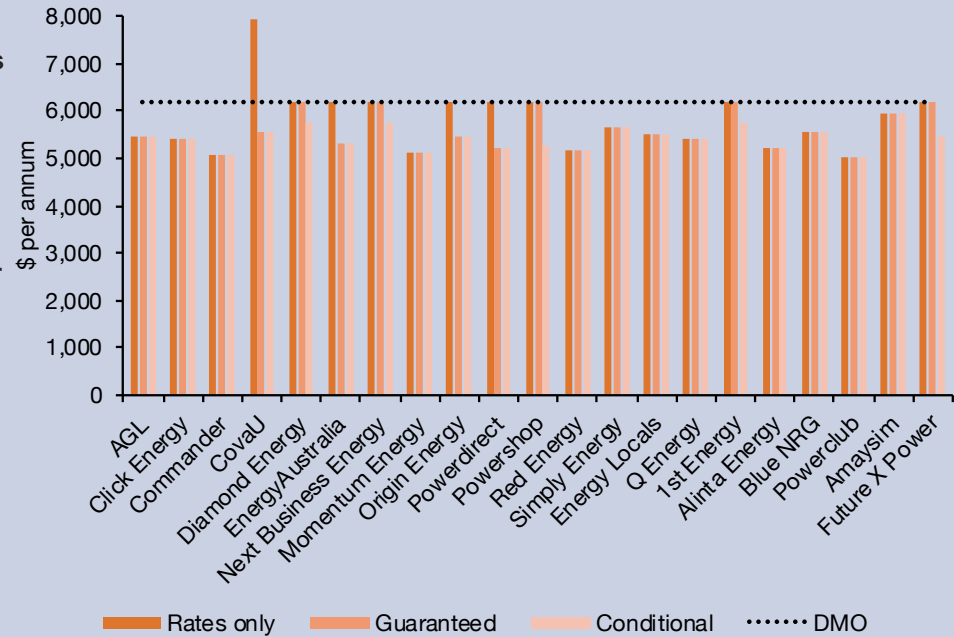
<sup>55</sup> Note that Powershop's conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing "specials".

<sup>56</sup> Origin Energy and Powershop's discounts are applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

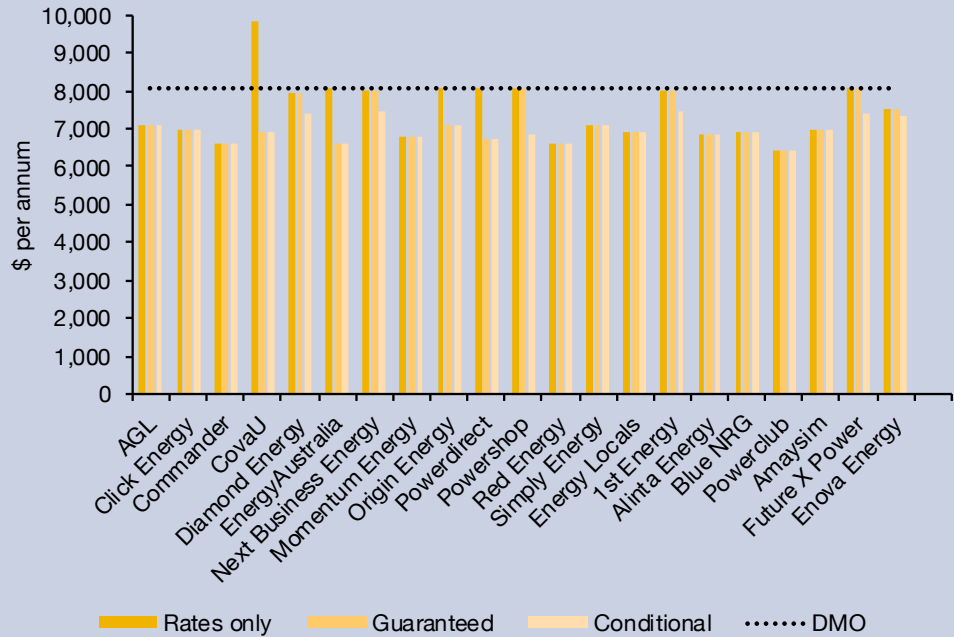
**CHART 27 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Ausgrid network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



**CHART 28 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Endeavour Energy network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



**CHART 29 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Essential Energy network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



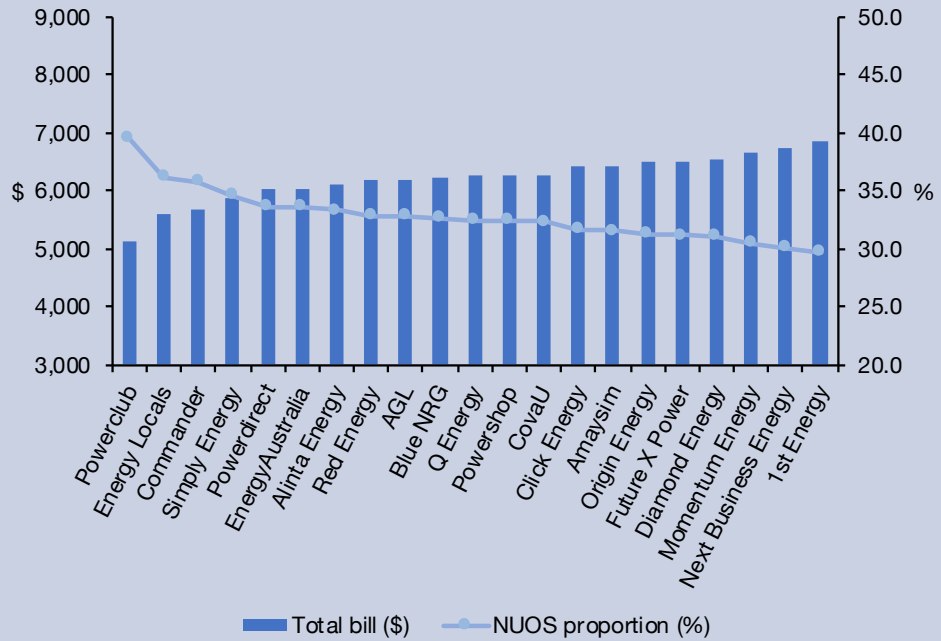
### **Network charges**

The NSW electricity networks, Ausgrid, Endeavour Energy and Essential Energy, introduce new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs.

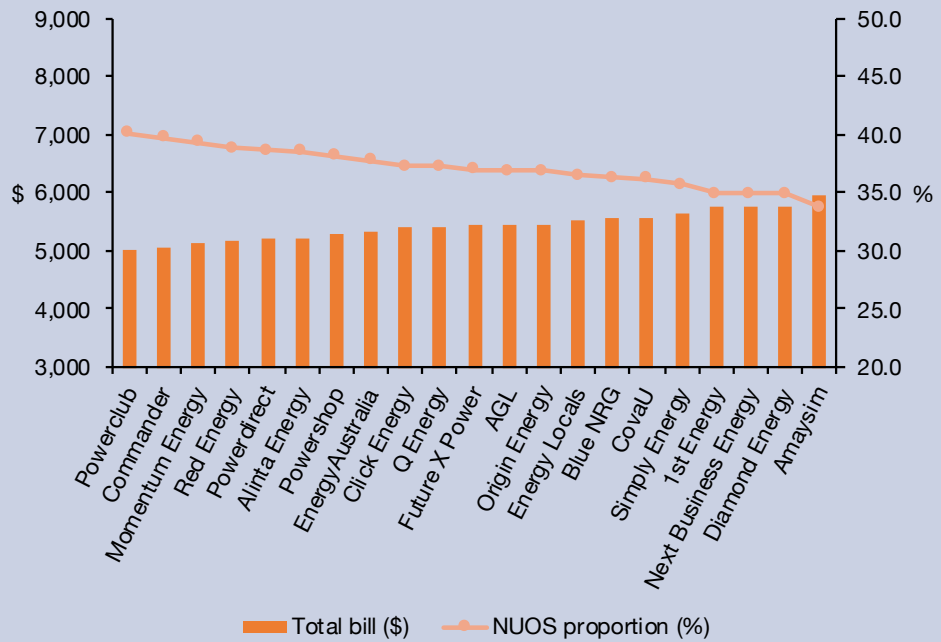
The charts presented in this section show that the NUOS proportion of bills varies significantly between retail offers. In the Ausgrid network, for example, the NUOS proportion of the bill for Powerclub’s customers is almost 40% while the NUOS only comprises 30% of the total bill for 1st Energy’s customers.

Charts 30 - 32 show annual retail bills (columns) and NUOS as proportion of annual bill (dotted line) for each of the three network areas.

**CHART 30 | Ausgrid:**  
Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>57</sup>



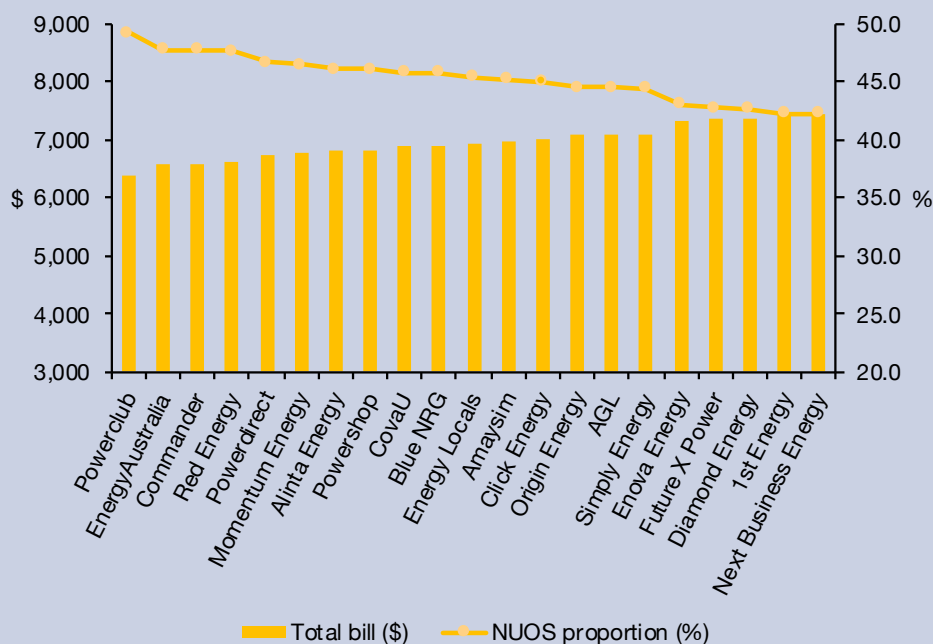
**CHART 31 | Endeavour Energy:**  
Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>58</sup>



<sup>57</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Ausgrid's charges (tariff EA 050) for the 2019/20 financial year. The NUOS also includes fixed charges.

<sup>58</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Endeavour Energy's charges (tariff N 90) for the 2019/20 financial year. The NUOS also includes fixed charges

**CHART 32 |**  
**Essential Energy:**  
**Annual retail bills**  
**(incl. GST) and**  
**NUOS as proportion**  
**of total bill, October**  
**2019. Based on**  
**retail market**  
**offers (including**  
**guaranteed and pay**  
**on time discounts),**  
**single rate, 20,000**  
**kWh per annum).<sup>59</sup>**



#### **4.1.2 NSW gas bills October 2019**

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill).<sup>60</sup> Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

#### **The price-spread**

The Jemena/AGL (Sydney) gas zone is, unsurprisingly, the area with most gas market offers in NSW. AGL is the incumbent retailer in this area.

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$2,720 (including discounts). Chart 33 shows annual bills for seven retailers in the Jemena/AGL (Sydney) gas zone and that the maximum price spread is approximately \$285 per annum.

<sup>59</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Essential Energy's charges (tariff BLNN 1AU) for the 2019/20 financial year. The NUOS also includes fixed charges.

<sup>60</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.



**CHART 33** | The price spread in the Jemena/AGL (Sydney) gas zone. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.

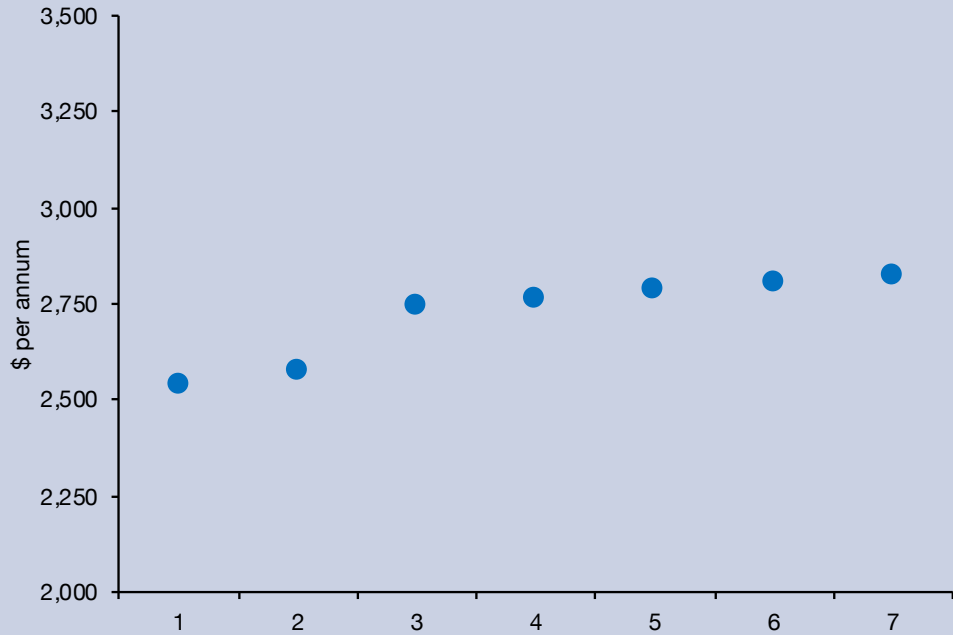



Figure 4 below ranks the retail offers from lowest to highest annual gas bills in the Jemena/Sydney gas zone.<sup>61</sup>

**FIGURE 4** | Lowest to highest annual bills (incl GST) for market offers in the Jemena/AGL (Sydney) gas zone (October 2019).  
Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

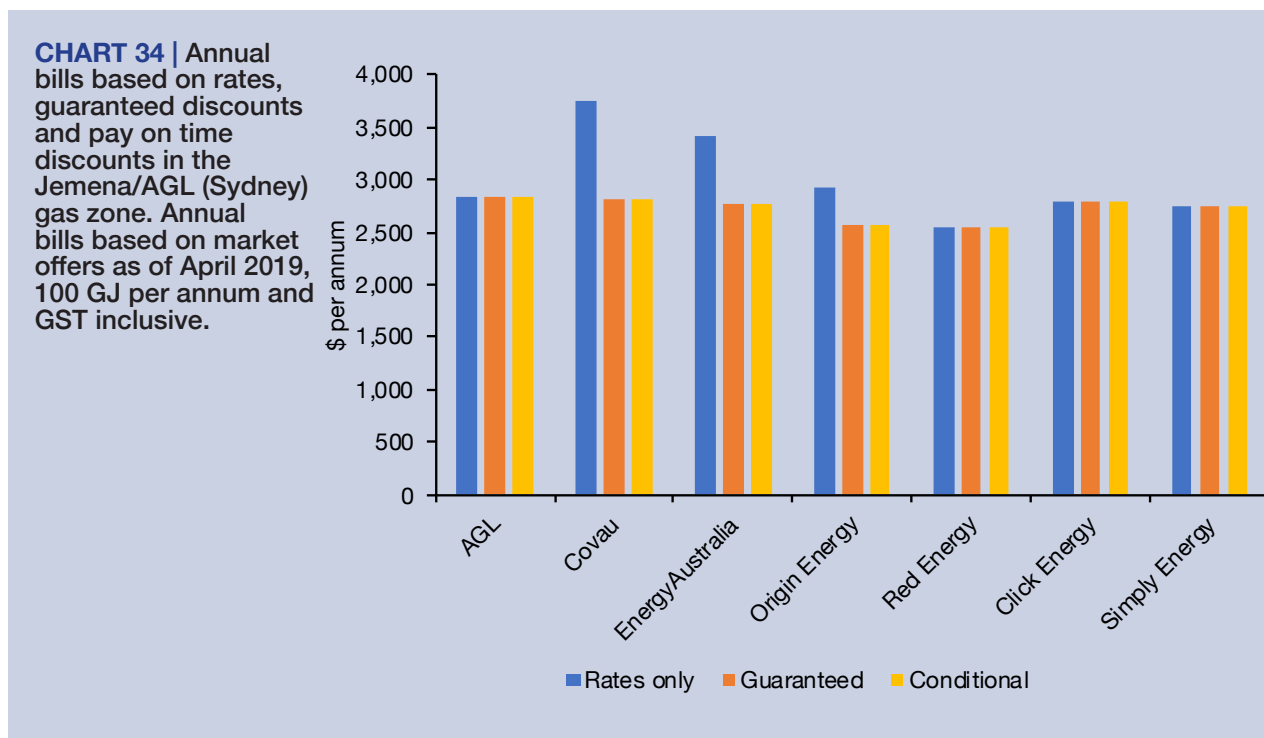
	Red Energy	<b>\$2,541</b>
	Origin Energy	<b>\$2,577</b>
	Simply Energy	<b>\$2,749</b>
	Energy Australia	<b>\$2,764</b>
	Click Energy	<b>\$2,789</b>
	CovaU	<b>\$2,805</b>
	AGL	<b>\$2,826</b>

<sup>61</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

## **Additional discounts**

Covau, Energy Australia and Origin offer guaranteed discounts while AGL, Red Energy, Click Energy and Simply Energy do not offer any additional discounts.

Chart 34 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts in the Jemena/AGL (Sydney) gas zone. It shows that Red Energy is the retailer that produces the lowest bill whether it is based on rates only, bills inclusive of guaranteed discounts or bills inclusive of conditional pay on time discounts.

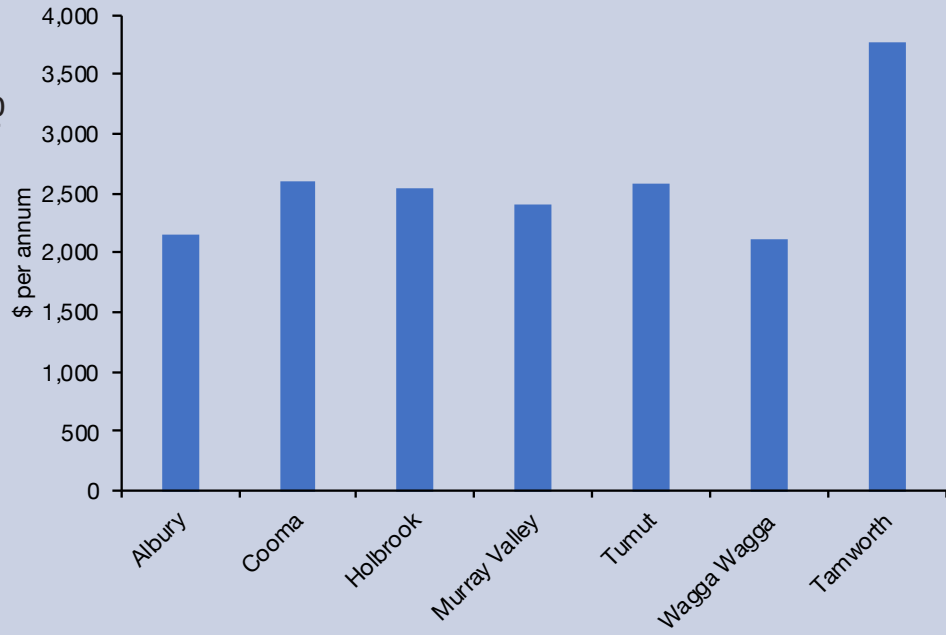


## **Regional NSW**

The Australian Gas Network (AGN) covers six different pricing zones in regional NSW and Origin Energy is the incumbent retailer. Origin Energy is also the incumbent retailer in the Tamworth gas zone. In addition to Origin Energy's market offers, AGL, Energy Australia and Red Energy also have offers in some of these price zones.

Chart 34 shows annual bills for Origin's market offers (discounts included) in the AGN pricing zones. Origin's market offers produce annual bills from approximately \$2,110 (in Wagga Wagga) to \$3,765 (Tamworth) for customers consuming 100 GJ per annum. Energy Australia and AGL also offer gas market offers in the Albury and Murray Valley gas zones. However, both Energy Australia and AGL's offers produce annual bills that are higher than Origin's. Red Energy offers gas in the Tumut and Cooma pricing zones, but these gas offers produce significantly higher bills than Origin Energy.

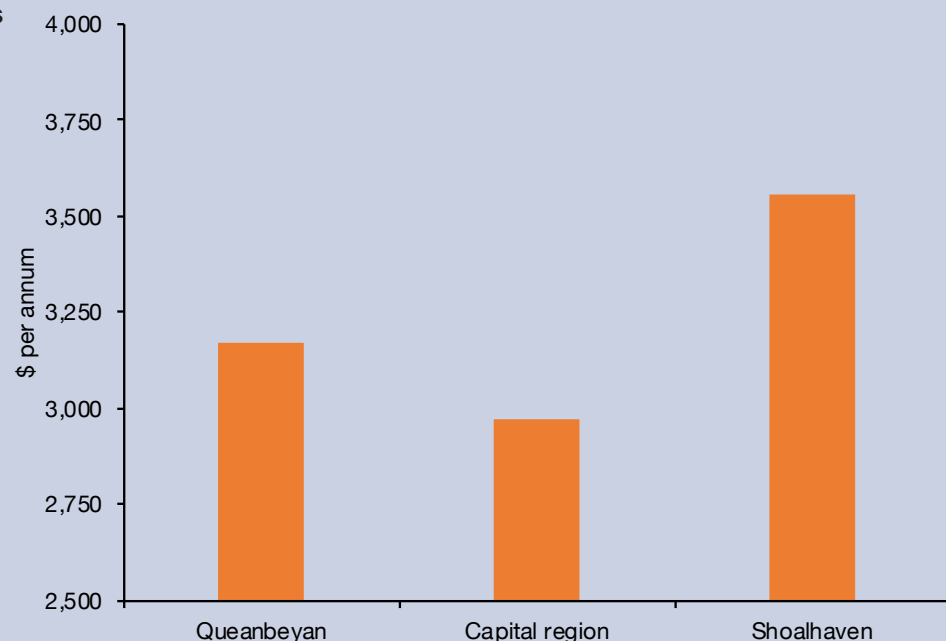
**CHART 35 |** Annual bills based in Origin's gas zones. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.



ActewAGL is the host retailer in three pricing zones: The Capital region, Shoalhaven and Queanbeyan. Energy Australia also has market offers in two of these pricing zones.

Chart 36 shows annual bills for ActewAGL's offers in these three pricing zones. ActewAGL's offers produce annual bills from approximately \$2,975 (in Capital region) to \$3,555 (Shoalhaven) for customers consuming 100 GJ per annum. Energy Australia also offers gas market offers in the Queanbeyan and Capital region gas zones. Energy Australia's offers produce annual bills that are \$555 less than ActewAGL's offer in Queanbeyan and \$260 less in Capital region.

**CHART 36 |** Annual bills based in ActewAGL's gas zones. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.

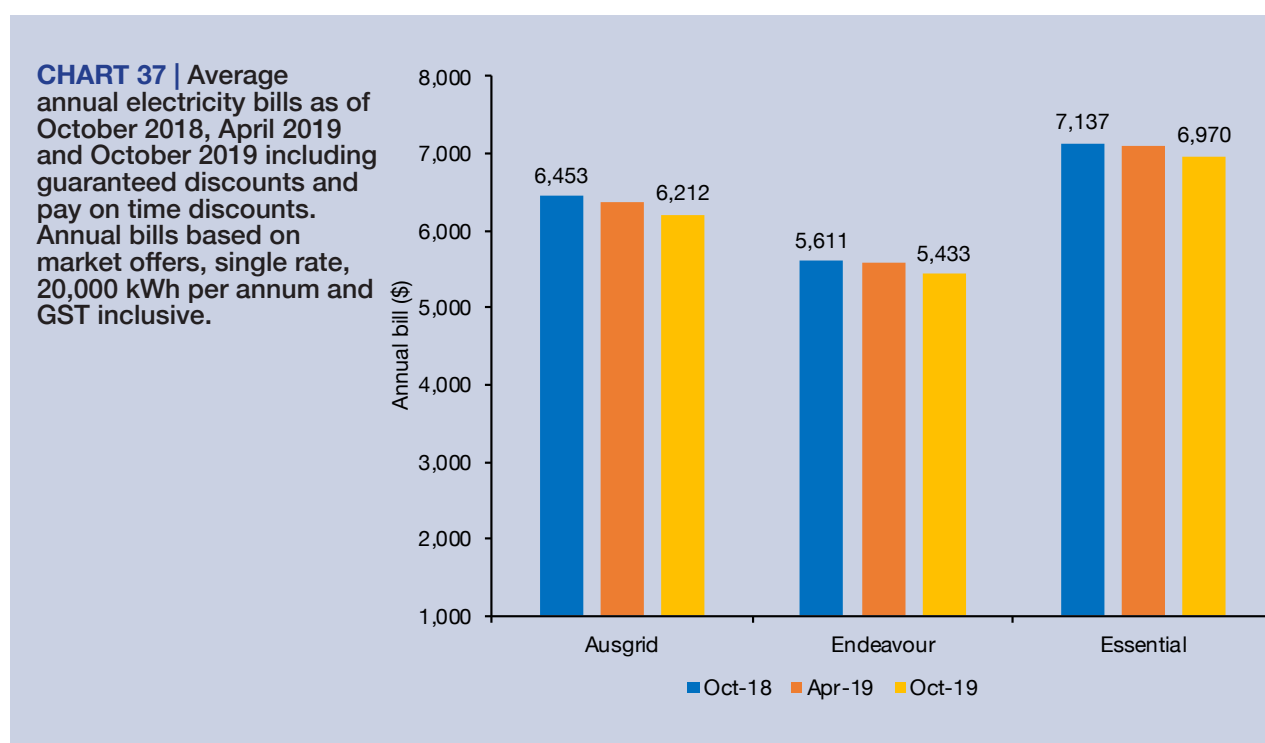


### 4.1.3 Changes in energy bills in NSW<sup>62</sup>

The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months from October 2018 to October 2019.

In NSW, new network tariffs took effect in July 2019 meaning that the electricity retail prices have been affected by an underlying price reset in this six month period. Most of the retailers have thus changed their offers (rates, discounts or both).

On average, bills have decreased in all network areas. Chart 37 below shows average annual bills as of October 2018, April 2019 and October 2019.



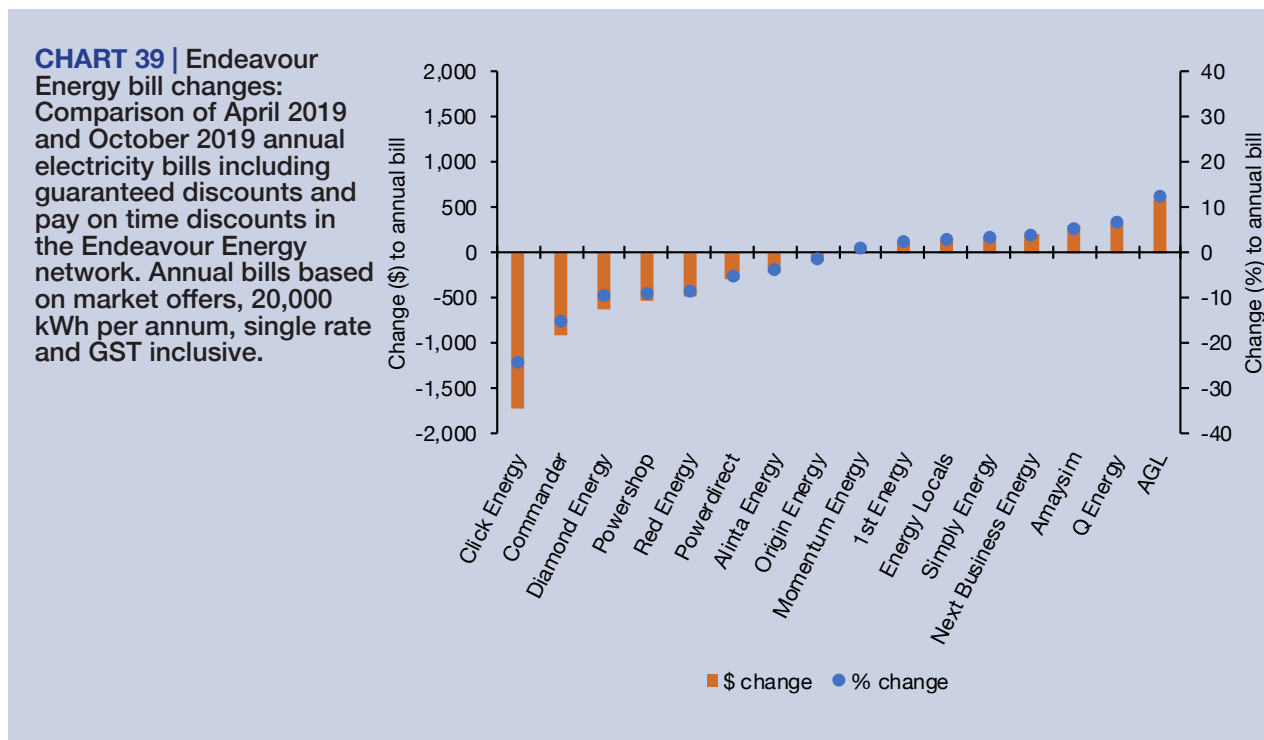
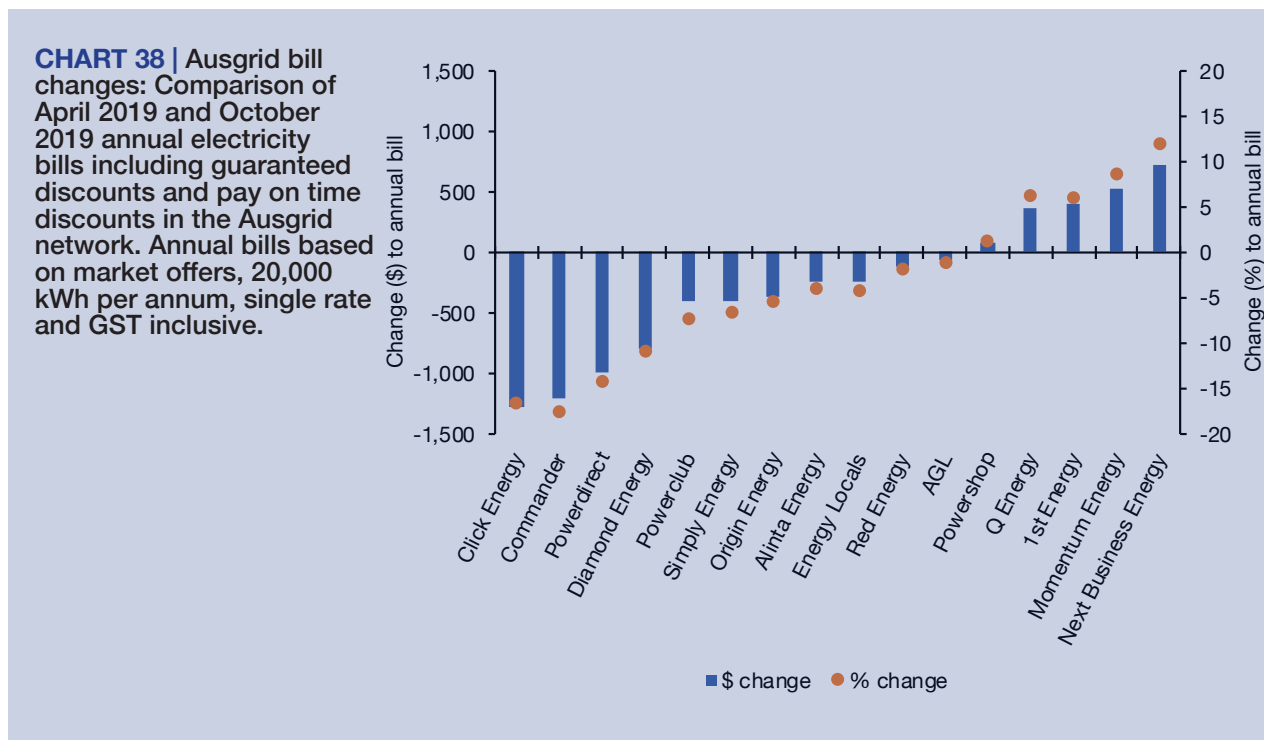
In the Ausgrid network, the annual bills for Click Energy, Commander, Powerdirect, and Diamond Energy have decreased by more than -10% while Next Business Energy, Momentum, 1st Energy and Q Energy's bills have increased by more than 6%. Next Business Energy is the retailer with the greatest increase (\$715 or 12%). See Chart 38.

In the Endeavour network, three retailers have decreased their bills by more than -10% (Click Energy, Commander and Diamond Energy) while AGL's bills have increased the most (12%). See Chart 39.

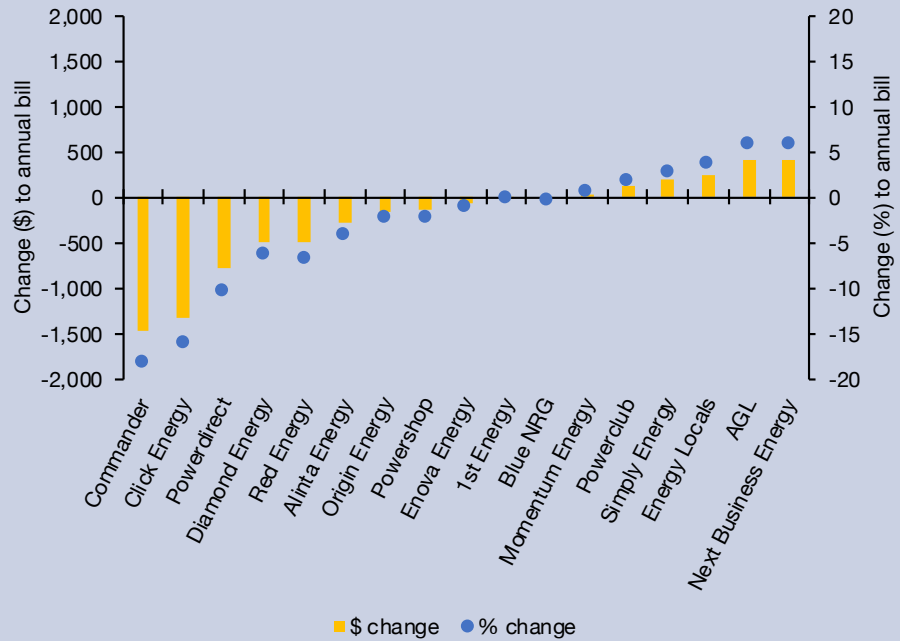
<sup>62</sup> Note that these price changes may differ from the overall averages in the national comparison (section 3 above). This is because the average bill in this section is based on retailers offering retail contracts as of both April 2019 and October 2019 while the national comparison includes all retailers offering retail contracts as of April 2019 and October 2019. For example; Future X Power, being a new retailer in NSW, would be included in the October 2019 average bill data used for national comparison but not in this more detailed jurisdictional analysis (as they did not have any offers in April 2019).

In the Essential Energy networks, the annual bills for Commander, Click Energy and Powerdirect have decreased by more than -10% while Next Business Energy and AGL's bills have increased by 6%. See Chart 40.

Charts 38 to 40 below show changes (\$) to the five retailers' bills (columns) as well as percentage changes (marker) for each network area.

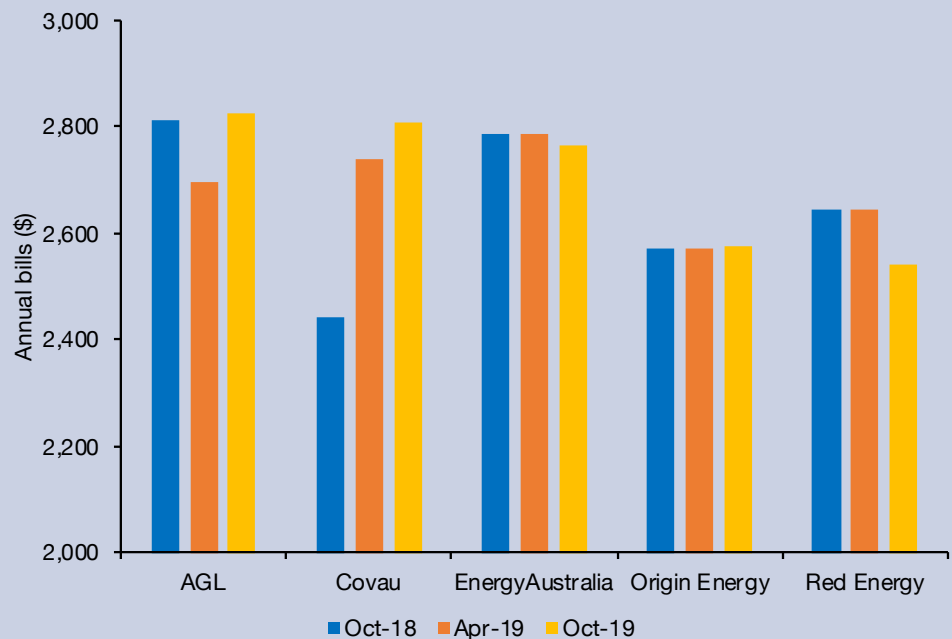


**CHART 40 | Essential Energy bill changes:** Comparison of April 2019 and October 2019 annual electricity bills including guaranteed discounts and pay on time discounts in the Essential Energy network. Annual bills based on market offers, 20,000 kWh per annum, single rate and GST inclusive.

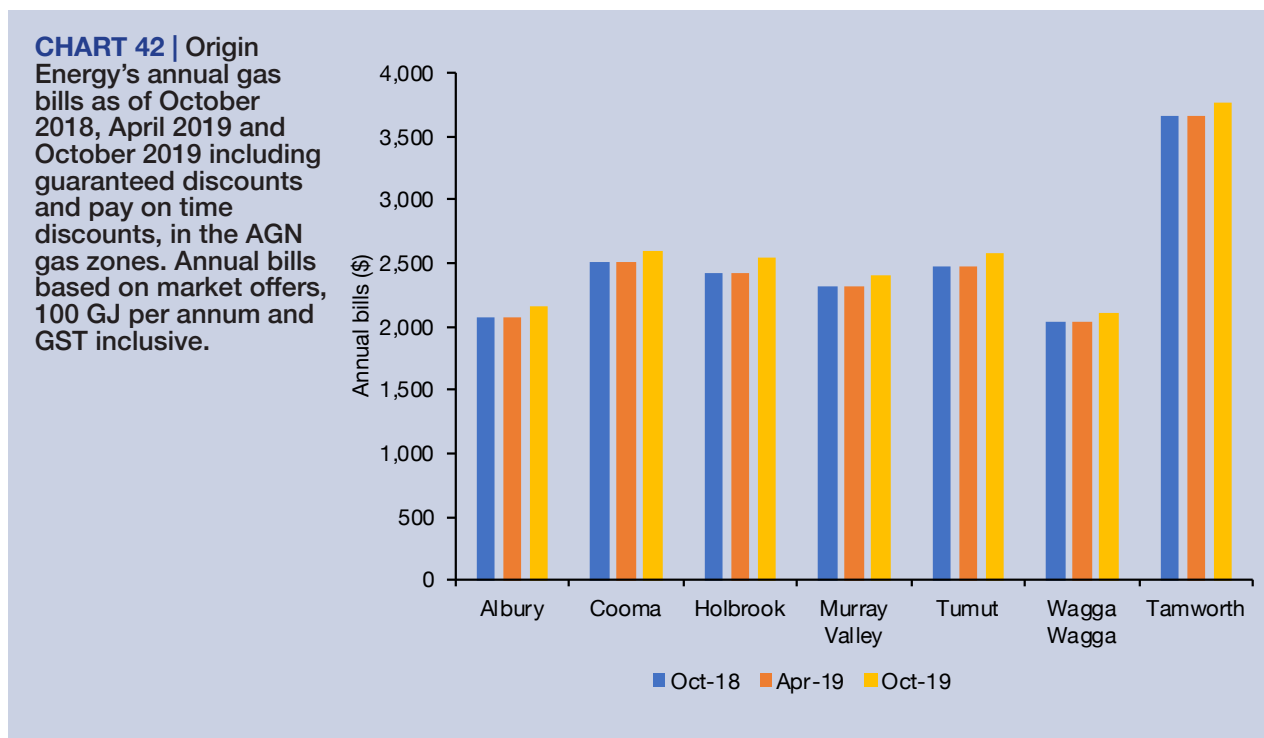


In relation to gas, two retailers (AGL and Covau) have increased their gas offer since April 2019 in the Sydney/Jemena pricing zone. AGL has increased their bills by 5% or \$130 per annum for a business using 100 GJ per annum while Covau has increased theirs by 2% (or \$65 per annum). Red Energy and Energy Australia, on the other hand, have decreased their bills. Red Energy has decreased theirs by -4% or \$105 while Energy Australia's bills have decreased slightly (by -1% or \$20 per annum). Origin Energy's bills have remained unchanged. See Chart 41 below.

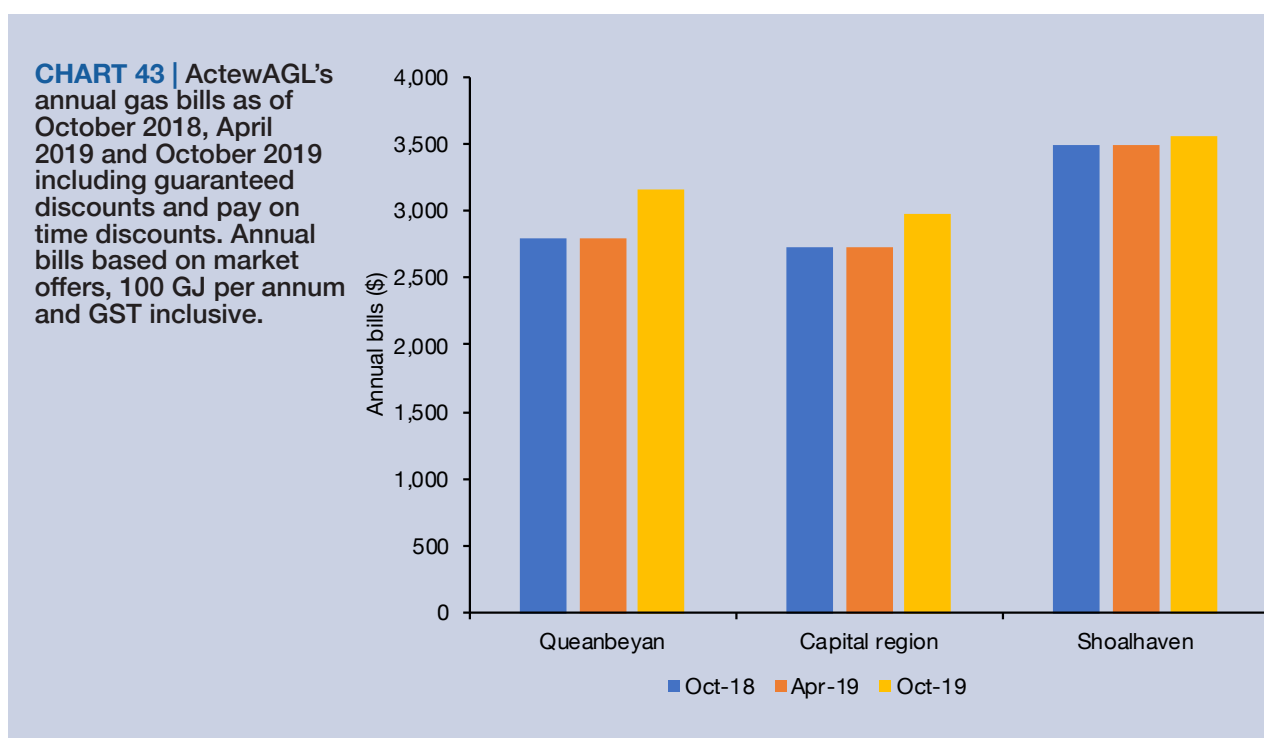
**CHART 41 | Annual gas bills as October 2018, April 2019 and October 2019** including guaranteed discounts and pay on time discounts, in the Jemena/Sydney gas zone. Annual bills based on market offers, 100 GJ per annum and GST inclusive.



In terms of the many smaller NSW pricing zones, Origin and ActewAGL are the main retailers (although AGL, Energy Australia and Red Energy do have offers in some of these zones). Between April 2019 and October 2019 Origin's market offers increased by approximately 3 - 5% in all pricing zones with the greatest increase being in the Holbrook zone (5% or approximately \$120 per annum). See Chart 42.



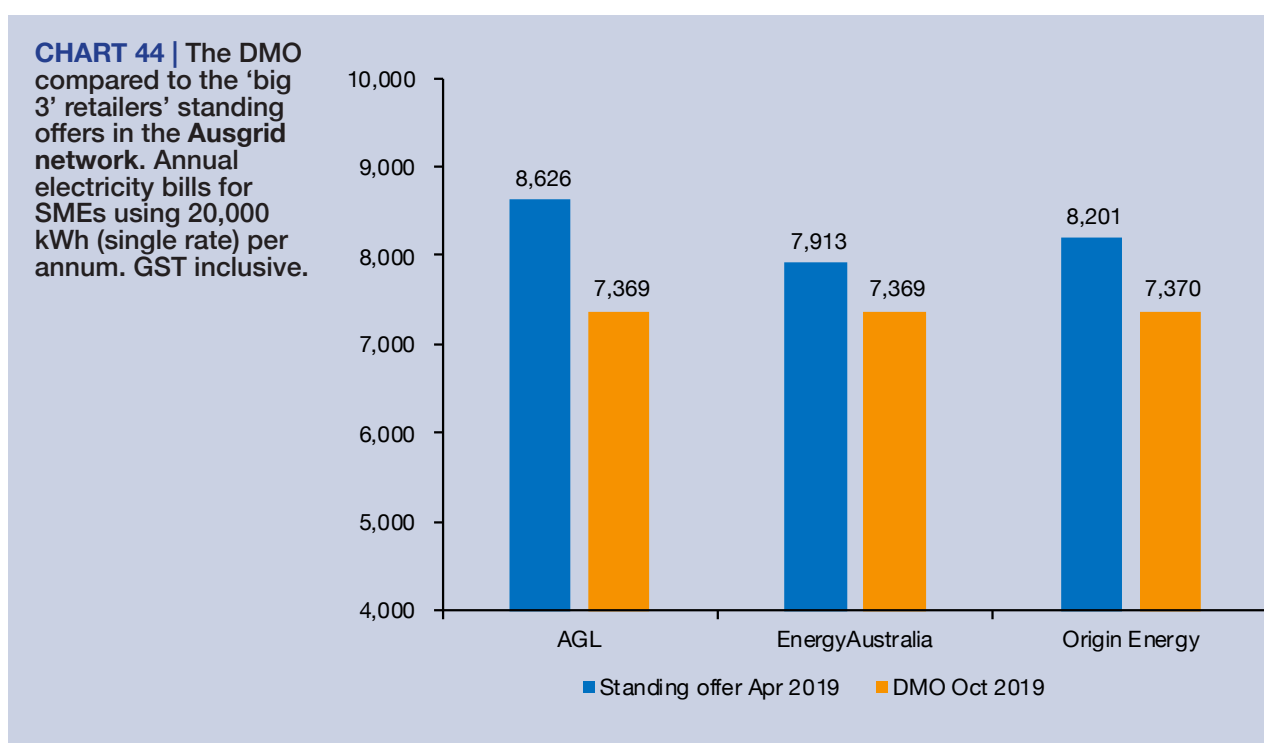
Between April 2019 and October 2019 ActewAGL's prices increased in all three pricing zones. Queanbeyan has received the greatest price increases (14% or \$380 per annum) while the increases in Shoalhaven have been more modest (2% or \$60 per annum). See Chart 43.



#### 4.1.4 Impact of the DMO

Since the introduction of the DMO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously. Furthermore, as shown in section 4.1.3 above, the average market offer bill has decreased in all three network areas but some retailers have market offers that produce higher bills in October 2019 compared to six months ago (April 2019). That said, none of the retail market offers produce annual bills that are greater than the DMO (see section 4.1.1 above).<sup>63</sup>

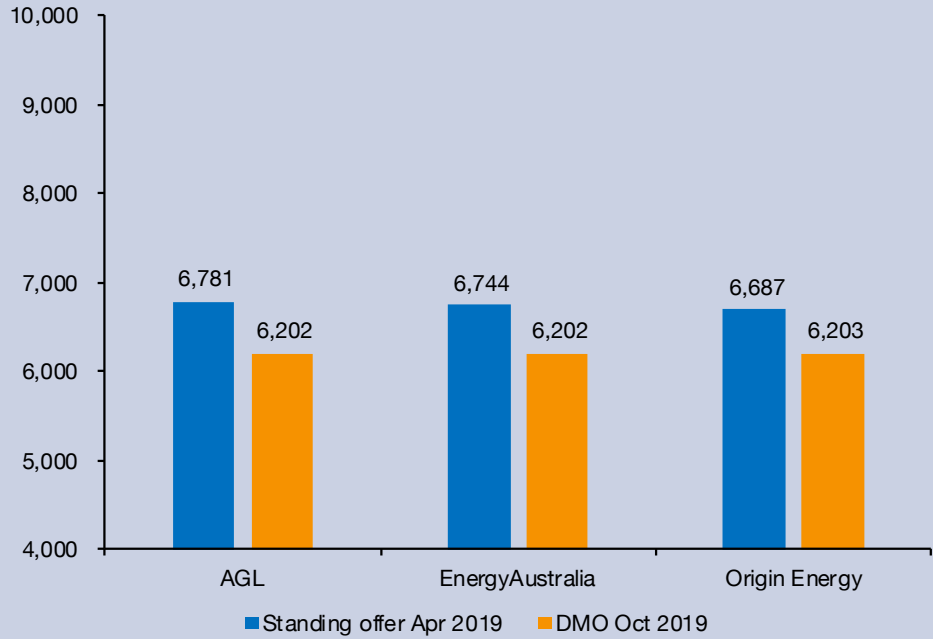
Businesses previously on a standing offer with one of the 'big 3' retailers (AGL, Energy Australia and Origin Energy) will have experienced significant bill reductions since the introduction of the DMO. Charts 44 – 46 below compare AGL, Energy Australia and Origin Energy's standing offers prior to the DMO taking effect to their current DMO offers. They show that the bill reduction for businesses using 20,000 kWh per annum is between \$480 and \$1,260 (depending on the network and retailer). AGL's bills in Ausgrid and Essential have reduced the most (by more than \$1,200) while Origin Energy's bill reduction in the Endeavour network is more modest (approximately \$485).



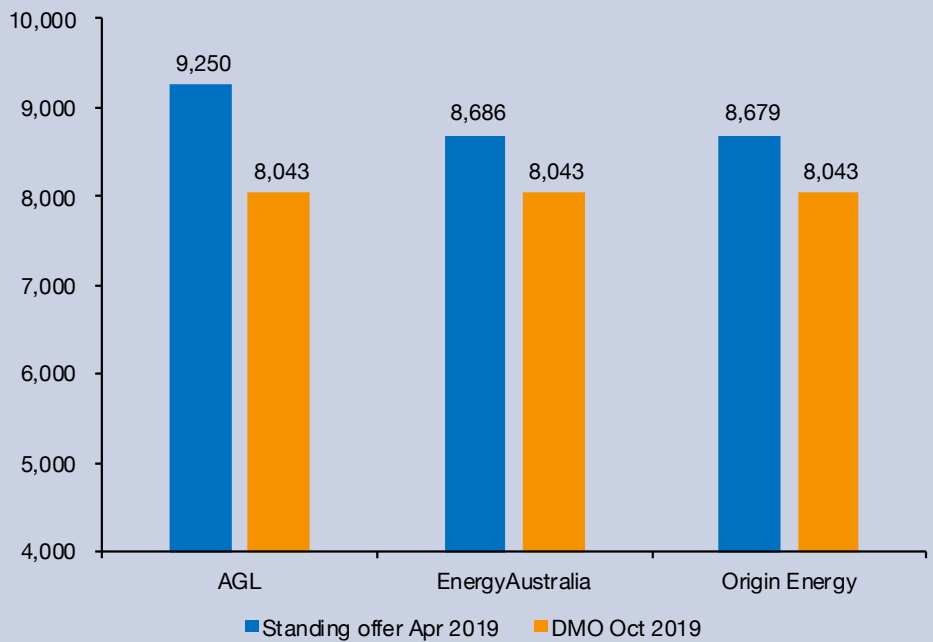
<sup>63</sup> Market offer bills including guaranteed discounts compared to the DMO in each network area..



**CHART 45 |** The DMO compared to the 'big 3' retailers' standing offers in the Endeavour network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



**CHART 46 |** The DMO compared to the 'big 3' retailers' standing offers in the Essential Energy network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



## 4.2 Victoria

Victorian electricity and gas retail prices have been deregulated since 2009 but on 1 July 2019 the Essential Services Commission's Victorian Default Offer (VDO) replaced the previously retailer determined electricity standing offers in Victoria. Victoria has five electricity networks and three gas distributors. There are, however, numerous gas pricing zones in Victoria and only the eight largest zones have been included in this analysis.

Victoria's five electricity networks and eight main gas pricing zones:

### Electricity network and incumbent retailer

<b>Citipower (Origin)</b>	Inner city, inner North and Eastern suburbs
<b>Powercor (Origin)</b>	Outer Western suburbs and Western Victoria
<b>Ausnet Services (Energy Australia)</b>	Outer Northern and Eastern suburbs and Eastern Victoria
<b>Jemena (AGL)</b>	Inner West and North Western Suburbs
<b>United Energy Energy (AGL)</b>	South Eastern suburbs and Mornington Peninsula

### Gas zones and incumbent retailers

<b>Multinet 1 (Origin)</b>	Eastern and South Eastern suburbs
<b>Multinet 2 (AGL)</b>	Bayside and outer South Eastern suburbs
<b>Ausnet Services Central 1 (Energy Australia)</b>	Outer Western suburbs, Geelong and Bellarine Peninsula
<b>Ausnet Services Central 2 (AGL)</b>	Western and North Western suburbs
<b>Ausnet Services West (Energy Australia)</b>	Macedon Ranges, Bendigo, Ballarat and Western Victoria
<b>AGN Central 1 (Origin)</b>	Frankston, Mornington Peninsula and Gippsland
<b>AGN Central 2 (Energy Australia)</b>	CBD, inner city and North Eastern suburbs
<b>AGN North (Origin)</b>	Northern and North Eastern Victoria

### 4.2.1 Victorian electricity bills October 2019

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>64</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, the network specific average consumption for small businesses is:

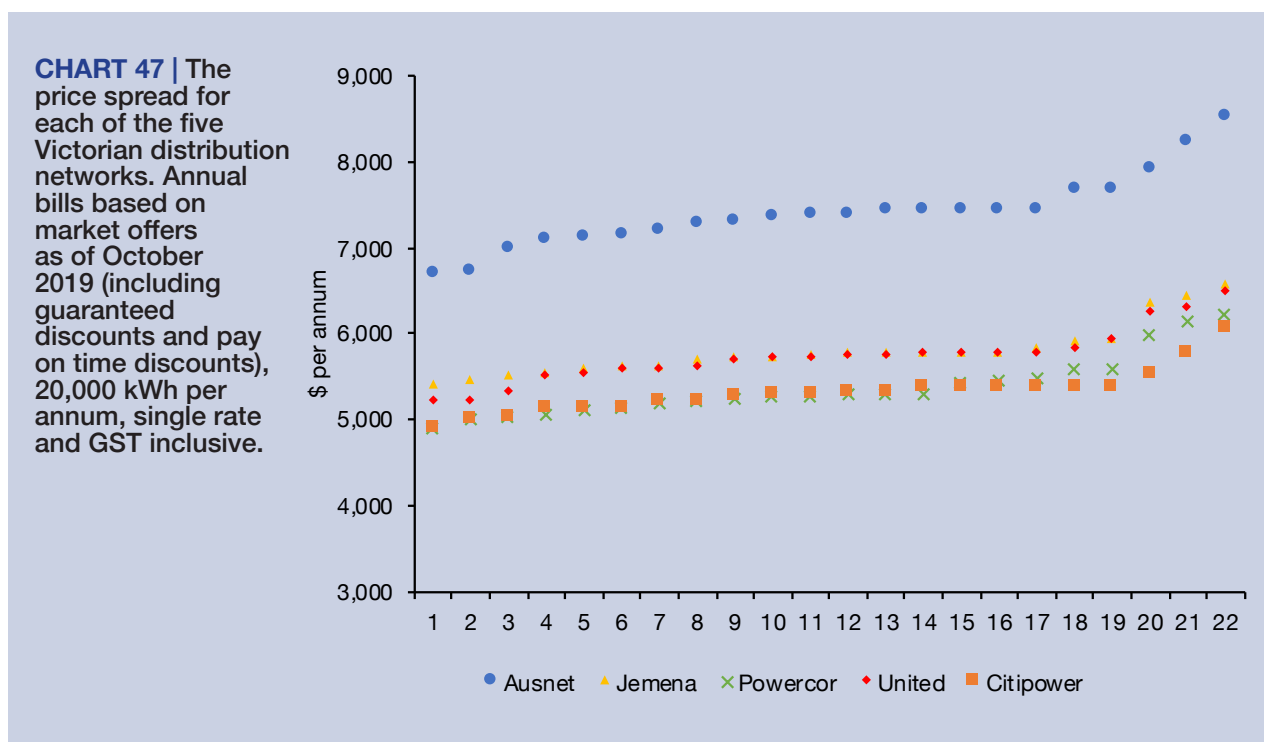
- 36,209 kWh/annum in Citipower
- 21,674 kWh/annum in Powercor
- 24,724 kWh/annum in Ausnet Services
- 21,858 kWh/annum in Jemena
- 23,629 kWh/annum in United Energy

<sup>64</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

### The price-spread

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is between \$5,330 and \$7,415 (depending on network area).<sup>65</sup> Chart 47 shows annual bills for SMEs consuming 20,000 kWh per annum (single rate) for 22 retailers across the five Victorian distribution networks. It shows that bills are highest in the Ausnet Services network and lowest in Citipower and that the offers in Citipower, Jemena, Powercor and United Energy network areas are quite similar. The maximum price spread is also greatest in the Ausnet Services network where the difference between the lowest and the highest annual bill is approximately \$1,820.
























Figures 5 - 9 below rank the retail offers from lowest to highest annual electricity bills in each of the five network areas.<sup>66</sup>







<sup>65</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

<sup>66</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.























**FIGURE 5 |** Lowest to highest annual bills (incl GST) for market offers in Victoria's **Citipower network** (October 2019) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Tango Energy	\$4,911
	Powerclub	\$5,010
	Commander	\$5,058
	Lumo Energy	\$5,141
	GloBird Energy	\$5,146
	Powershop	\$5,158
	Powerdirect	\$5,236
	EnergyAustralia	\$5,238
	AGL	\$5,294
	Amaysim	\$5,316
	Red Energy	\$5,320
	BlueNRG	\$5,344
	ClickEnergy	\$5,345
	Momentum Energy	\$5,396
	Sumo Power	\$5,396
	1st Energy	\$5,397
	Simply Energy	\$5,400
	Alinta Energy	\$5,400
	Origin Energy	\$5,400
	Diamond Energy	\$5,544
	CovaU	\$5,778
	Next Business Energy	\$6,083








**FIGURE 6 |** Lowest to highest annual bills (incl GST) for market offers in Victoria's **Powercor network** (October 2019) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Tango Energy	\$4,892
	Commander	\$4,995
	Lumo Energy	\$5,028
	Powerdirect	\$5,070
	Powerclub	\$5,107
	EnergyAustralia	\$5,125
	AGL	\$5,177
	Red Energy	\$5,204
	ClickEnergy	\$5,230
	Momentum Energy	\$5,277
	1st Energy	\$5,281
	Simply Energy	\$5,283
	Alinta Energy	\$5,283
	Origin Energy	\$5,283
	Diamond Energy	\$5,437
	Powershop	\$5,464
	BlueNRG	\$5,475
	GloBird Energy	\$5,579
	Sumo Power	\$5,590
	Amaysim	\$5,991
	CovaU	\$6,152
	Next Business Energy	\$6,222























**FIGURE 7 |** Lowest to highest annual bills (incl GST) for market offers in Victoria's **Ausnet Services network** (October 2019), including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Powershop	\$6,705
	Tango Energy	\$6,733
	Powerclub	\$7,006
	Lumo Energy	\$7,120
	Powerdirect	\$7,141
	Commander	\$7,156
	EnergyAustralia	\$7,127
	AGL	\$7,290
	Red Energy	\$7,329
	ClickEnergy	\$7,365
	Sumo Power	\$7,387
	Momentum Energy	\$7,399
	1st Energy	\$7,437
	Simply Energy	\$7,440
	Alinta Energy	\$7,440
	Origin Energy	\$7,440
	BlueNRG	\$7,459
	GloBird Energy	\$7,678
	Diamond Energy	\$7,688
	CovaU	\$7,926
	Next Business Energy	\$8,255
	Amaysim	\$8,524

**FIGURE 8 |** Lowest to highest annual bills (incl GST) for market offers in Victoria's **Jemena network** (October 2019) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

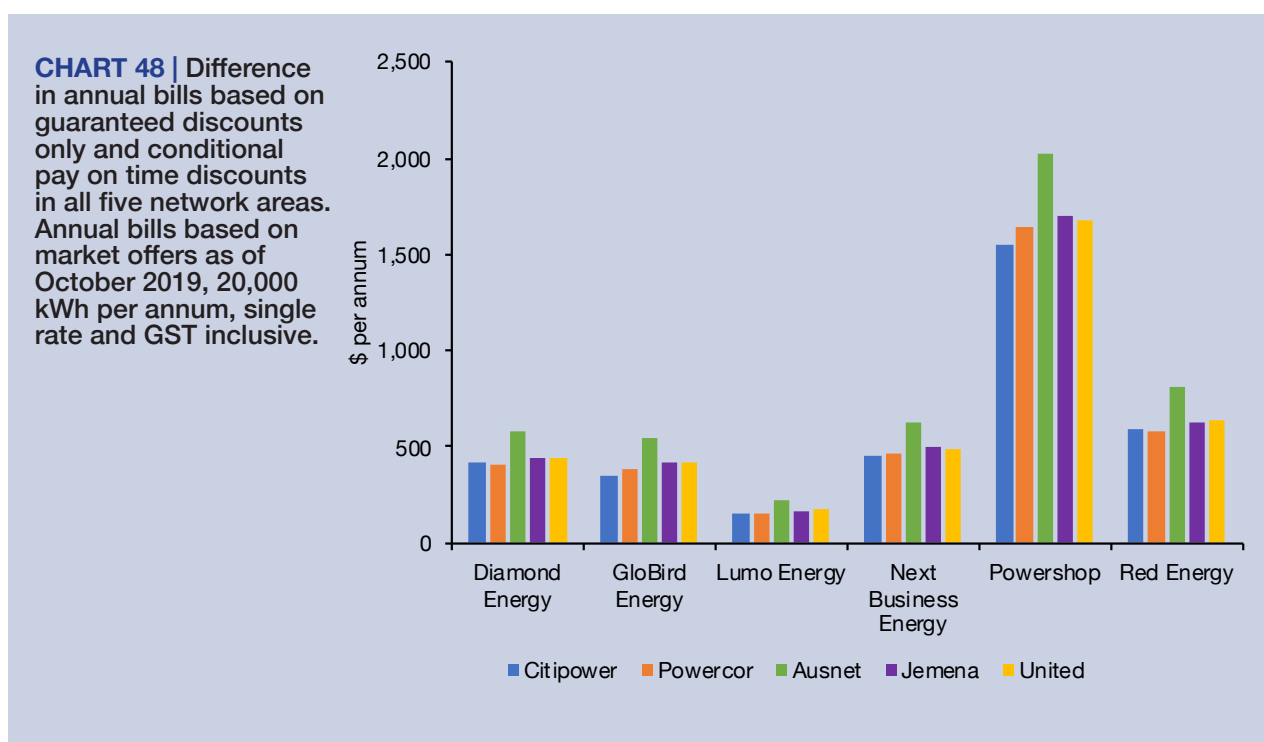
	Powerclub	\$5,406
	Commander	\$5,461
	Lumo Energy	\$5,510
	Powerdirect	\$5,550
	EnergyAustralia	\$5,607
	Tango Energy	\$5,618
	Powershop	\$5,625
	Red Energy	\$5,694
	ClickEnergy	\$5,723
	AGL	\$5,725
	Sumo Power	\$5,762
	Momentum Energy	\$5,776
	1st Energy	\$5,778
	Alinta Energy	\$5,781
	Origin Energy	\$5,781
	Simply Energy	\$5,781
	BlueNRG	\$5,837
	GloBird Energy	\$5,917
	Diamond Energy	\$5,936
	CovaU	\$6,367
	Amaysim	\$6,433
	Next Business Energy	\$6,571

**FIGURE 9 |** Lowest to highest annual bills (incl GST) for market offers in Victoria's **United Energy network** (October 2019) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Tango Energy	\$5,236
	Momentum Energy	\$5,238
	Commander	\$5,347
	Lumo Energy	\$5,516
	Powershop	\$5,556
	Powerdirect	\$5,612
	EnergyAustralia	\$5,613
	Powerclub	\$5,639
	Red Energy	\$5,699
	AGL	\$5,729
	ClickEnergy	\$5,723
	BlueNRG	\$5,752
	Sumo Power	\$5,764
	1st Energy	\$5,785
	Alinta Energy	\$5,787
	Origin Energy	\$5,787
	Simply Energy	\$5,787
	GloBird Energy	\$5,845
	Diamond Energy	\$5,941
	CovaU	\$6,273
	Amaysim	\$6,306
	Next Business Energy	\$6,496

## Additional discounts

Six of the 22 retailers operating in Victoria offer conditional pay on time discounts (down from twelve in April 2019). For customers using 20,000kWh per annum the conditional discount can be worth up to \$2,020 (Powershop's offers in Ausnet Services).<sup>67</sup> This is, however, significantly less than six months ago (April 2019) when the difference was almost \$3,545 per annum. Other retailers with conditional pay on time discounts are Diamond Energy, GloBird Energy, Lumo Energy, Next Business Energy and Red Energy. Chart 48 below shows the difference to annual bills that include guaranteed discounts only compared to annual bills that include pay on time discounts (only retailers that offer conditional discounts are included in this Chart).

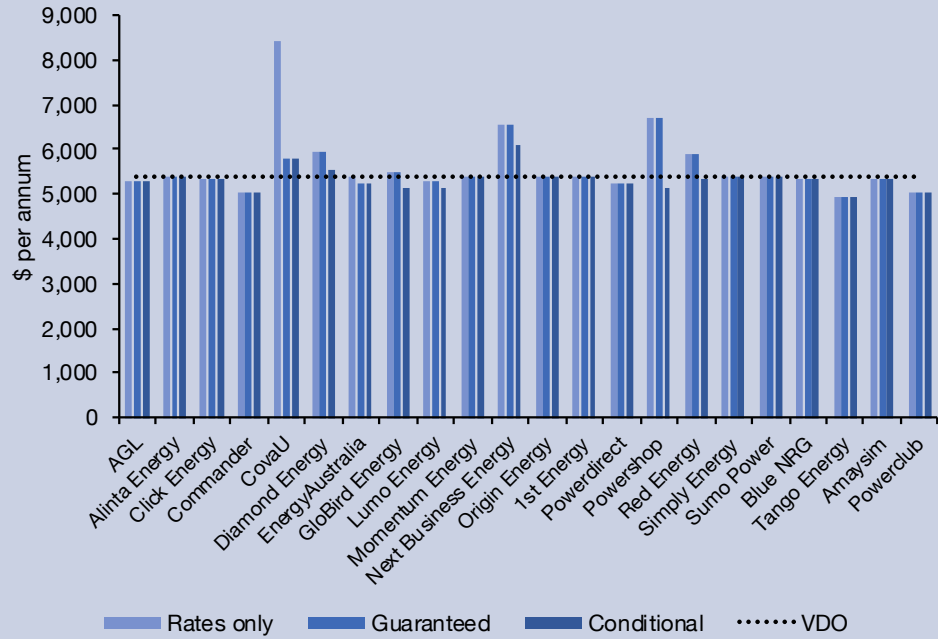


Charts 49 - 53 show annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts for all five network areas.<sup>68</sup> They also compare the market offers to the VDO and while some offers produce bills that are lower than the VDO, Covau and Next Business Energy's offers are consistently higher than the VDO. In the case of Powershop, Red Energy, Diamond Energy and GloBird, customers need to obtain the conditional discounts in order to have bills that are below or similar to the VDO.

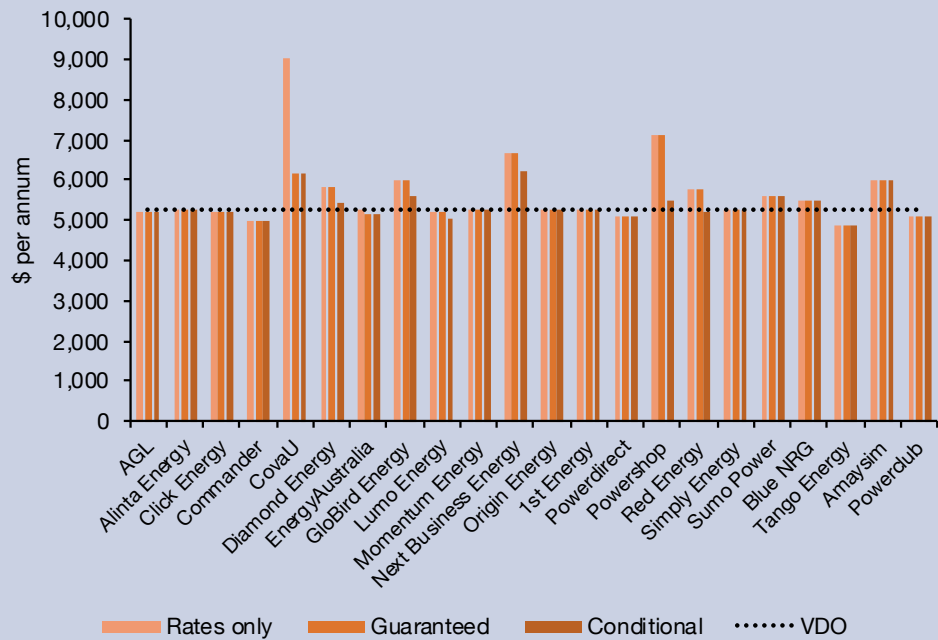
<sup>67</sup> Note that Powershop's conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing "specials".

<sup>68</sup> Origin Energy, Red Energy and Powershop's discounts are applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

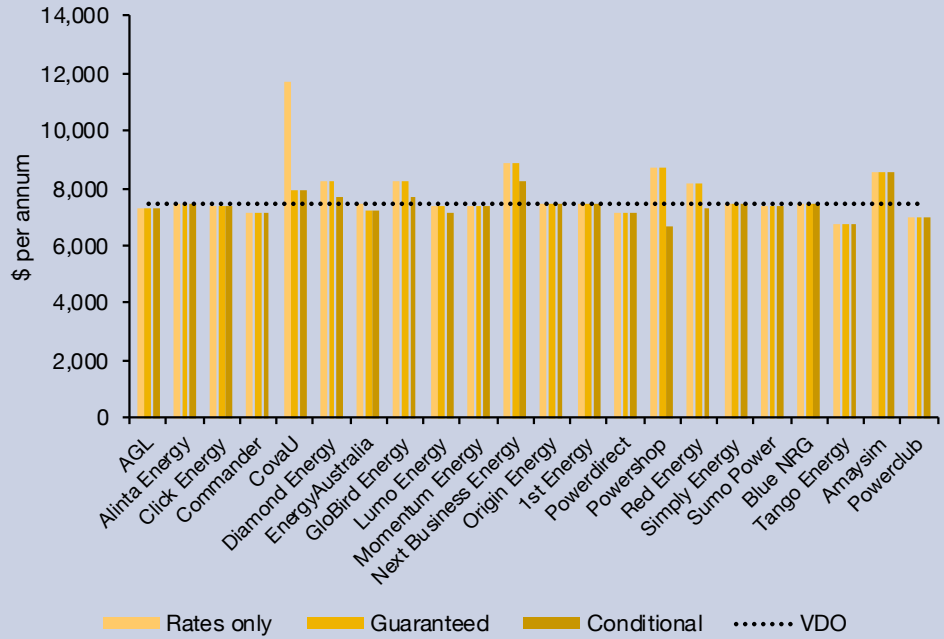
**CHART 49 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Citipower network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



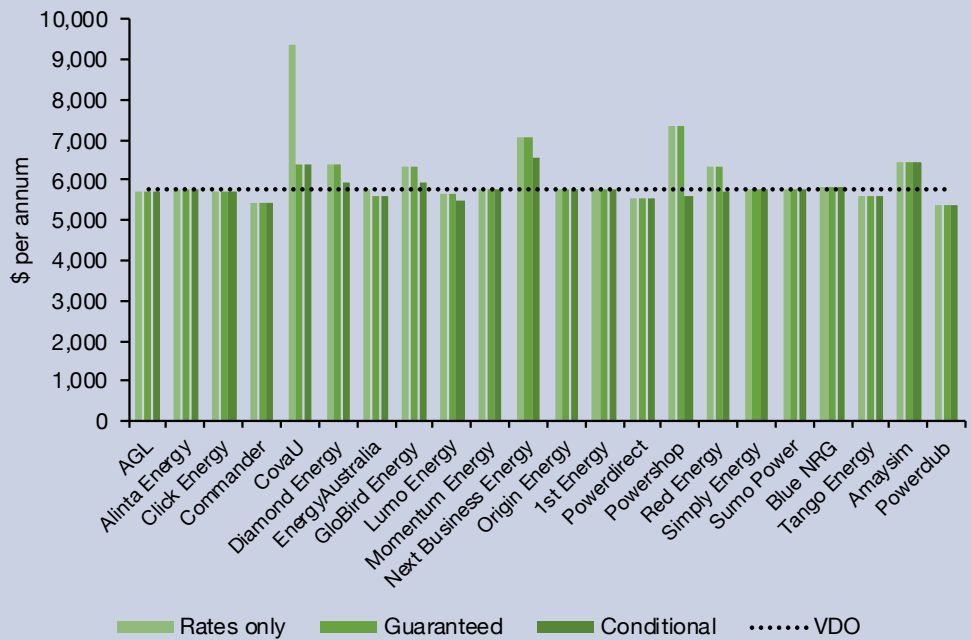
**CHART 50 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Powercor network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



**CHART 51 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Ausnet Services network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**

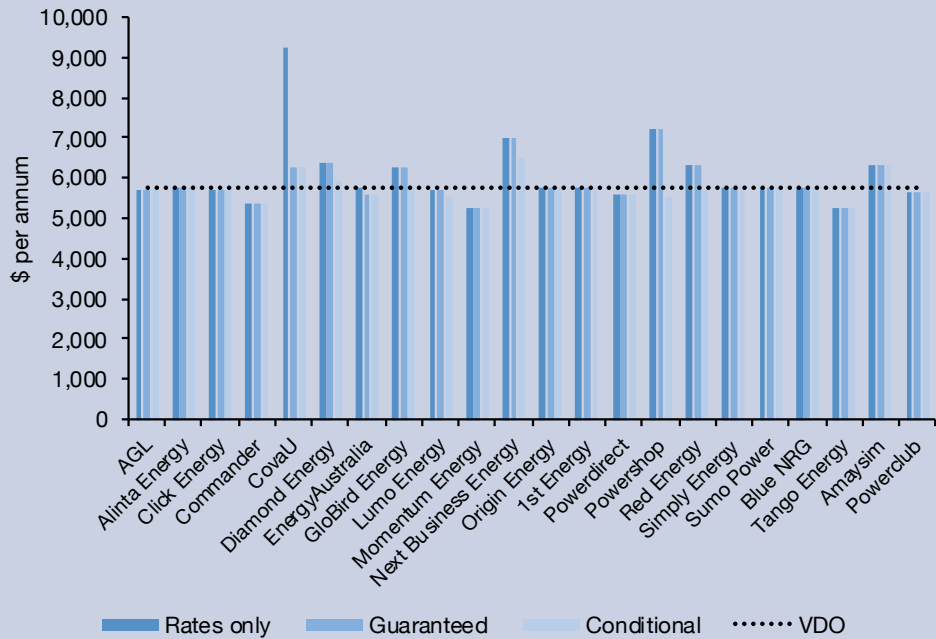


**CHART 52 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Jemena network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**





**CHART 53 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's United Energy network. Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive**



### Network charges

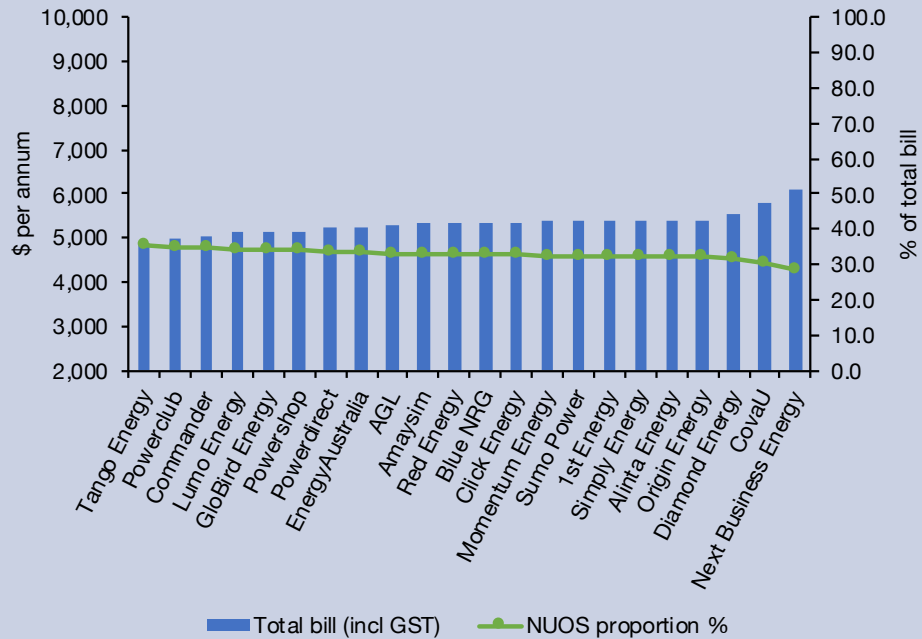
The five Victorian electricity networks (Citipower, Powercor, Ausnet Services, Jemena and United Energy), introduce new Network Use of System (NUOS) charges as of 1 January every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs.

The charts presented in this section show that the NUOS proportion of bills varies significantly between retail offers as well as network areas.

Charts 54 - 58 show annual retail bills (columns) and NUOS as proportion of annual bill (line) for each of the five network areas.

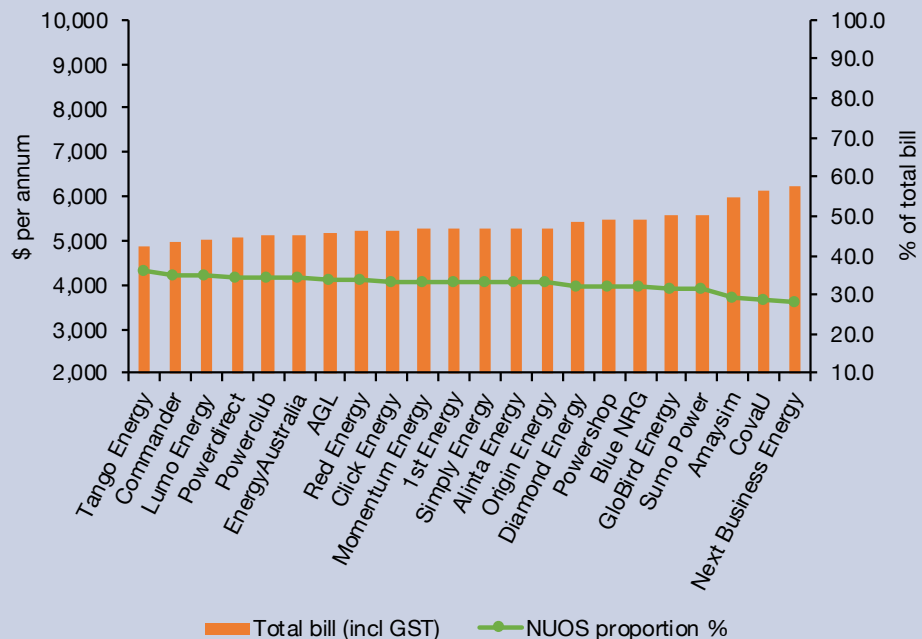
In the Citipower network the NUOS charges account for almost 36% of Tango Energy's annual bill while they only make up 29% of Next Business Energy's offer.

**CHART 54 | Citipower:** Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>69</sup>



In the Powercor network the NUOS charges account for approximately 36% of Tango Energy’s annual bill while they only make up 28% of Next Business Energy’s offer.

**CHART 55 | Powercor:** Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>70</sup>

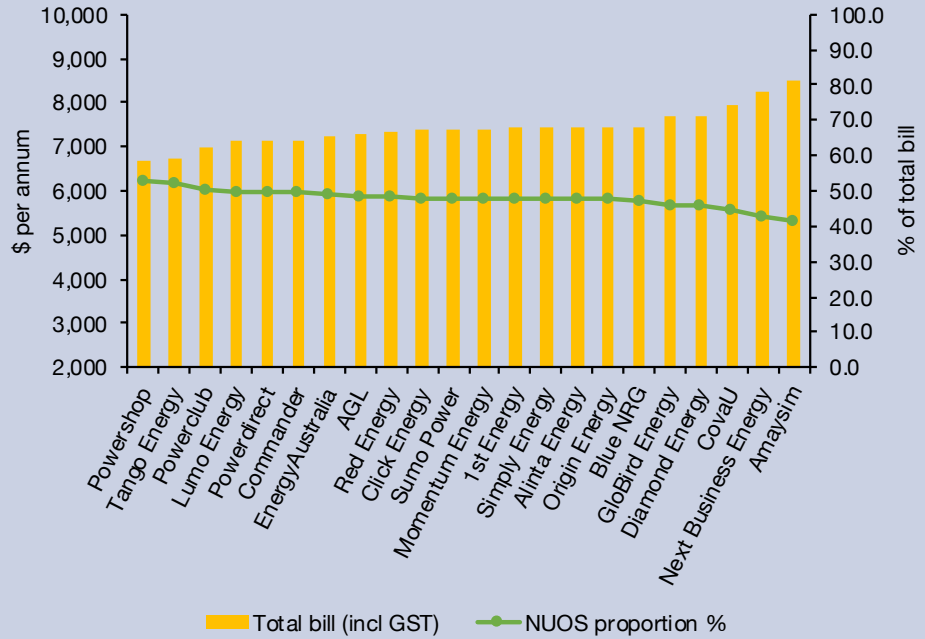


In the Ausnet Services network where the NUOS charges are higher, the NUOS charges account for 53% of Powershop’s annual bill while they only make up 41.5% of Amaysim’s offer.

<sup>69</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Citipower’s charges (tariff C1G) for the 2019 calendar year. The NUOS also includes fixed charges.

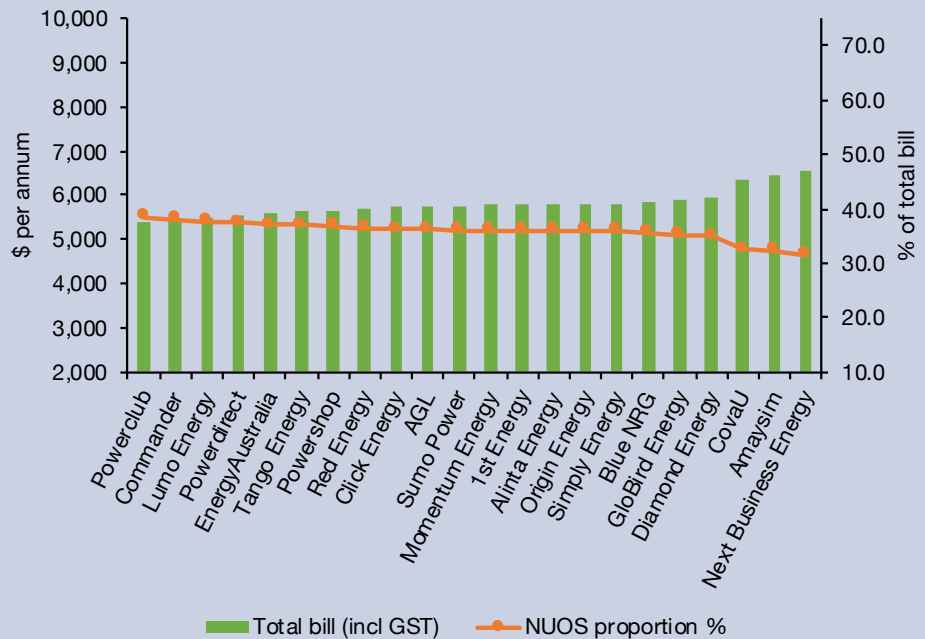
<sup>70</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Powercor’s charges (tariff ND1) for the 2019 calendar year. The NUOS also includes fixed charges.

**CHART 56 | Ausnet Services: Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019.** Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>71</sup>



In the Jemena network the NUOS charges account for approximately 38% of Powerclub’s annual bills while they only make up 32% of Next Business Energy’s offer.

**CHART 57 | Jemena: Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019.** Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>72</sup>

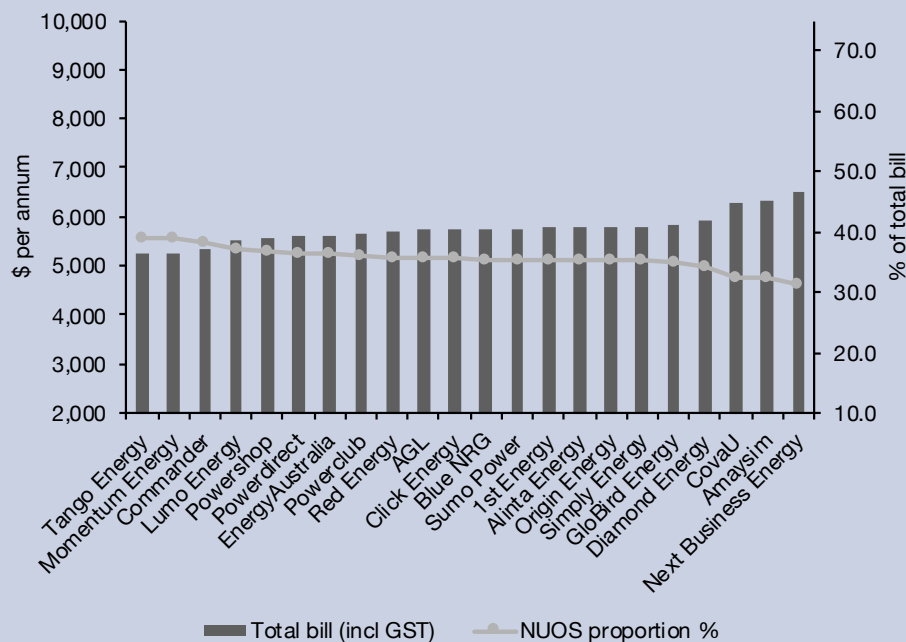


In the United Energy network the NUOS charges account for 39% of Tango Energy’s offer while they only make up 31% of Next Business Energy’s offer.

<sup>71</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Ausnet Services’ charges (tariff NEE 12) for the 2019 calendar year. The NUOS also includes fixed charges.

<sup>72</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Jemena’s charges (tariff A200) for the 2019 calendar year. The NUOS also includes fixed charges.

**CHART 58 | United Energy: Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>73</sup>**



#### 4.2.2 Victorian gas bills October 2019

There are eight main pricing zones in Victoria, two in the Multinet network, three in Ausnet Services and three in Australian Gas Networks (AGN).

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill).<sup>74</sup> Small businesses using gas for heating purposes are unlikely to have a flat consumption profile and may use more at peak rates (winter months) than what has been calculated here. Furthermore, as Victorian small businesses typically have a higher gas consumption compared to SMEs in other jurisdictions, a 100 GJ annual consumption is a relatively low gas consumption in Victoria.

#### The price-spread

The typical annual market offer bill for SMEs consuming 100 GJ per annum ranges from \$1,970 (including discounts) in the Ausnet Services Central pricing zones to \$2,240 in the AGN North zone. The maximum price spread is highest in the two AGN Central pricing zones where the difference between the highest and lowest annual bill is \$570 per annum. The price spread is lowest in the Ausnet Services West zone (\$440).

Chart 59 shows the average gas market offer bill for the eight main pricing zone as well as the maximum price spread for each area.

<sup>73</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the United Energy's charges (tariff LVM 1R) for the 2019 calendar year. The NUOS also includes fixed charges.

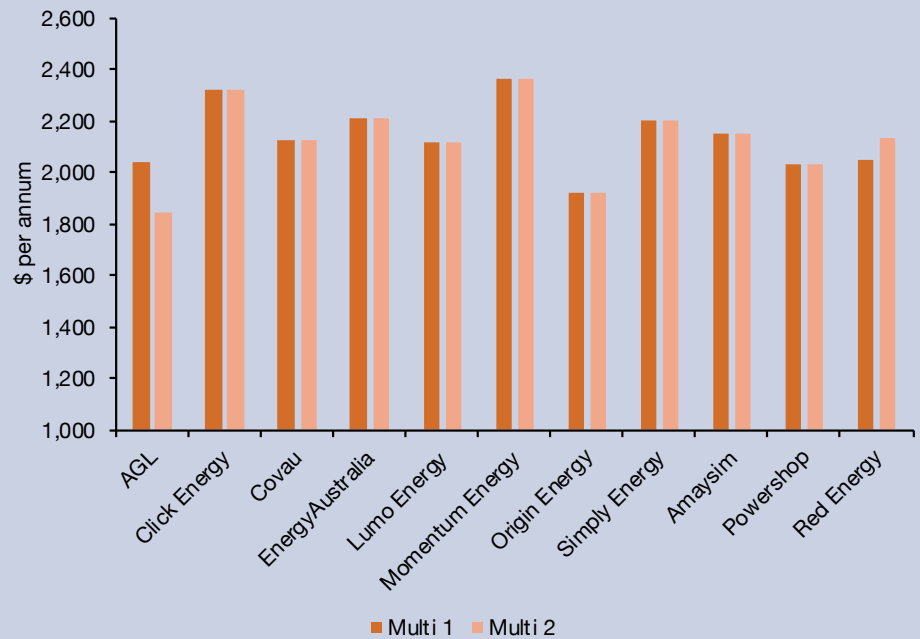
<sup>74</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

**CHART 59 |** Average annual bills and price spread in the Victorian gas pricing zones. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.



Chart 60 shows the retailers' gas market offer bills in the two Multinet pricing zones.









**CHART 60 |** Annual gas bills in Victoria's Multinet pricing zones. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.



Figures 10 - 11 below rank the retail offers from lowest to highest annual gas bills in the two Multinet pricing zones.<sup>75</sup>

<sup>75</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

**FIGURE 10 |** Lowest to highest annual bills (incl GST) for market offers in the **Multinet 1 gas zone** (October 2019). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	Origin Energy	<b>\$1,919</b>
	Powershop	<b>\$2,031</b>
	AGL	<b>\$2,041</b>
	Red Energy	<b>\$2,048</b>
	Lumo Energy	<b>\$2,115</b>
	CovaU	<b>\$2,123</b>
	Amaysim	<b>\$2,155</b>
	Simply Energy	<b>\$2,198</b>
	EnergyAustralia	<b>\$2,211</b>
	Click Energy	<b>\$2,325</b>
	Momentum Energy	<b>\$2,365</b>

**FIGURE 11 |** Lowest to highest annual bills (incl GST) for market offers in the **Multinet 2 gas zone** (October 2019). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum












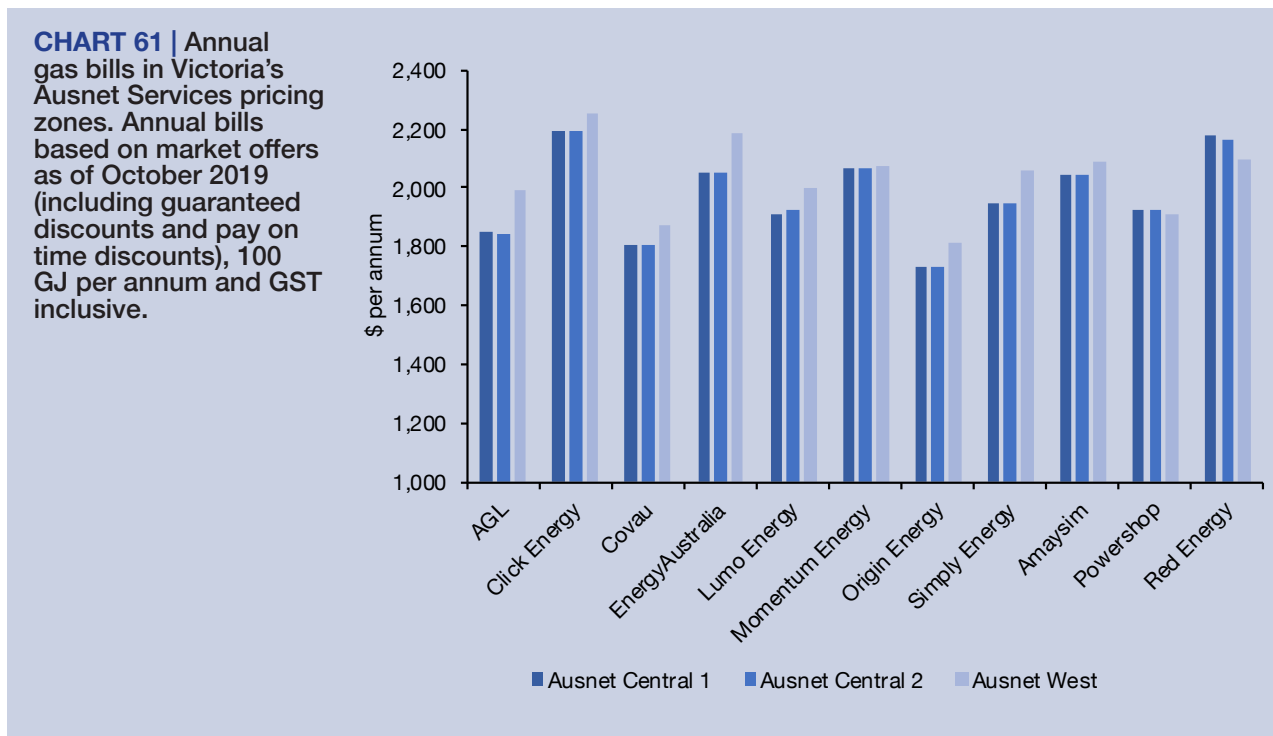
	AGL	<b>\$1,846</b>
	Origin Energy	<b>\$1,919</b>
	Powershop	<b>\$2,031</b>
	Lumo Energy	<b>\$2,118</b>
	CovaU	<b>\$2,123</b>
	Red Energy	<b>\$2,134</b>
	Amaysim	<b>\$2,155</b>
	Simply Energy	<b>\$2,198</b>
	EnergyAustralia	<b>\$2,212</b>
	Click Energy	<b>\$2,325</b>
	Momentum Energy	<b>\$2,365</b>




Chart 61 shows the retailers' gas market offer bills in the three Ausnet Services pricing zones.



Figures 12 - 14 below rank the retail offers from lowest to highest annual gas bills in the three Ausnet Services pricing zones.<sup>76</sup>


**FIGURE 12 |** Lowest to highest annual bills (incl GST) for market offers in the **Ausnet Services Central 1 gas zone** (October 2019).

*Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum*

	Origin Energy	<b>\$1,731</b>
	CovaU	<b>\$1,804</b>
	AGL	<b>\$1,847</b>
	Lumo Energy	<b>\$1,911</b>
	Powershop	<b>\$1,923</b>
	Simply Energy	<b>\$1,945</b>
	Amaysim	<b>\$2,042</b>
	EnergyAustralia	<b>\$2,055</b>
	Momentum Energy	<b>\$2,066</b>
	Red Energy	<b>\$2,181</b>
	Click Energy	<b>\$2,196</b>

**FIGURE 13 |** Lowest to highest annual bills (incl GST) for market offers in the **Ausnet Services Central 2 gas zone** (October 2019).

*Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum*

	Origin Energy	<b>\$1,731</b>
	CovaU	<b>\$1,804</b>
	AGL	<b>\$1,843</b>
	Powershop	<b>\$1,923</b>
	Lumo Energy	<b>\$1,925</b>
	Simply Energy	<b>\$1,945</b>
	Amaysim	<b>\$2,042</b>
	EnergyAustralia	<b>\$2,049</b>
	Momentum Energy	<b>\$2,066</b>
	Red Energy	<b>\$2,162</b>
	Click Energy	<b>\$2,196</b>

**FIGURE 14 |** Lowest to highest annual bills (incl GST) for market offers in the **Ausnet Services West gas zone** (October 2019).

*Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum*


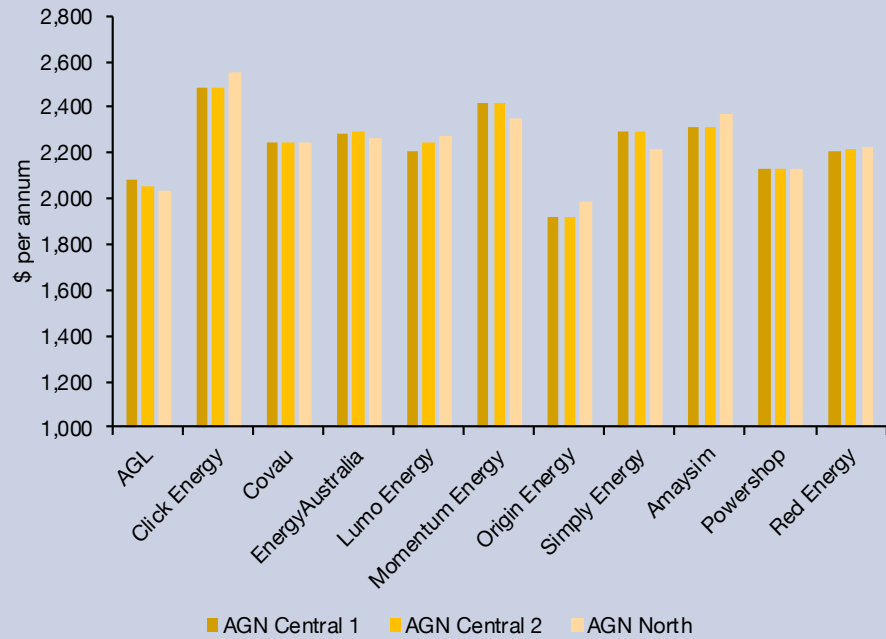
	Origin Energy	<b>\$1,812</b>
	CovaU	<b>\$1,871</b>
	Powershop	<b>\$1,903</b>
	AGL	<b>\$1,988</b>
	Lumo Energy	<b>\$2,001</b>
	Simply Energy	<b>\$2,057</b>
	Momentum Energy	<b>\$2,078</b>
	Amaysim	<b>\$2,089</b>
	Red Energy	<b>\$2,099</b>
	EnergyAustralia	<b>\$2,184</b>
	Click Energy	<b>\$2,250</b>

Chart 62 shows the retailers' gas market offer bills in the three AGN pricing zones.

<sup>76</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.


**CHART 62 | Annual gas bills in Victoria's AGN pricing zones. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.**



Figures 15 - 17 below rank the retail offers from lowest to highest annual gas bills in the three AGN pricing zones.<sup>77</sup>





**FIGURE 15 | Lowest to highest annual bills (incl GST) for market offers in the AGN Central 1 gas zone (October 2019).**

Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Origin Energy	\$1,917
	AGL	\$2,079
	Powershop	\$2,131
	Red Energy	\$2,208
	Lumo Energy	\$2,209
	CovaU	\$2,244
	EnergyAustralia	\$2,280
	Simply Energy	\$2,089
	Amaysim	\$2,310
	Momentum Energy	\$2,417
	Click Energy	\$2,487












**FIGURE 16 | Lowest to highest annual bills (incl GST) for market offers in the AGN Central 2 gas zone (October 2019).**

Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Origin Energy	\$1,916
	AGL	\$2,052
	Powershop	\$2,131
	Red Energy	\$2,216
	CovaU	\$2,244
	Lumo Energy	\$2,250
	EnergyAustralia	\$2,291
	Simply Energy	\$2,291
	Amaysim	\$2,310
	Momentum Energy	\$2,417
	Click Energy	\$2,487

**FIGURE 17 | Lowest to highest annual bills (incl GST) for market offers in the AGN North gas zone (October 2019).**

Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Origin Energy	\$1,989
	AGL	\$2,034
	Powershop	\$2,131
	Simply Energy	\$2,220
	Red Energy	\$2,223
	CovaU	\$2,244
	EnergyAustralia	\$2,261
	Lumo Energy	\$2,277
	Momentum Energy	\$2,355
	Amaysim	\$2,374
	Click Energy	\$2,552

<sup>77</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

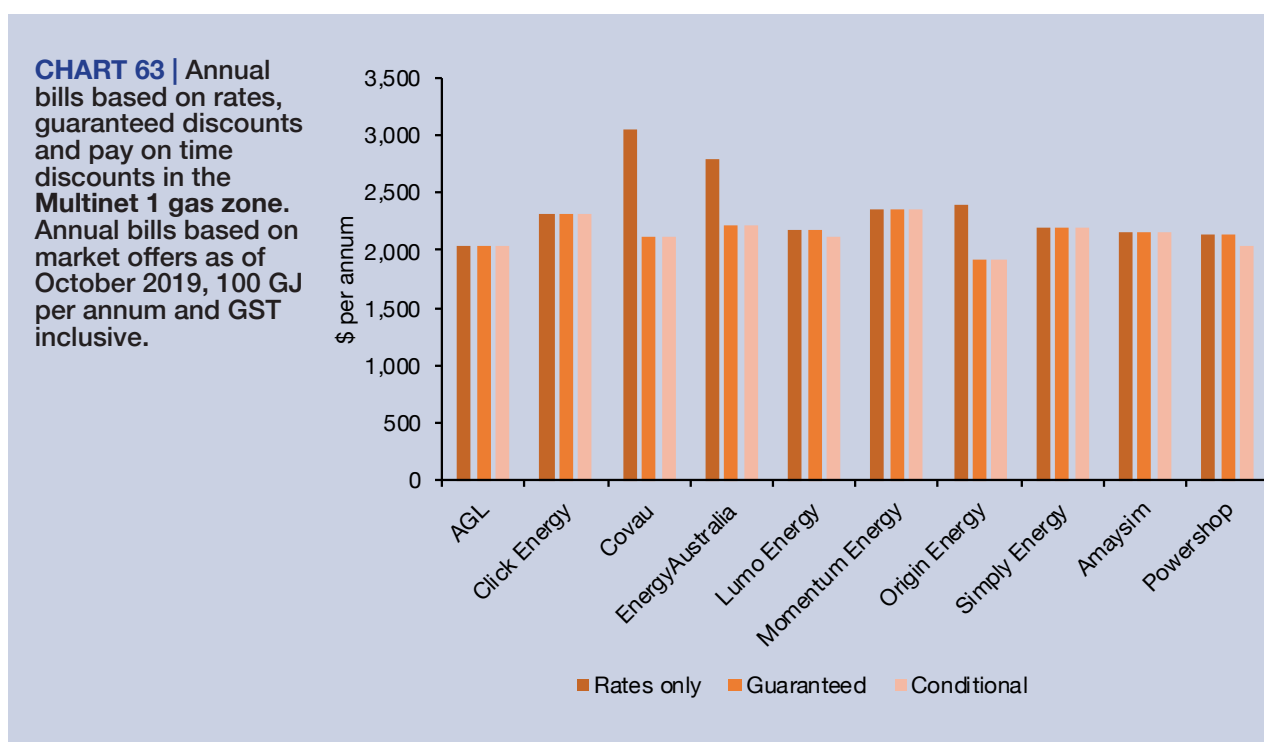


## Additional discounts

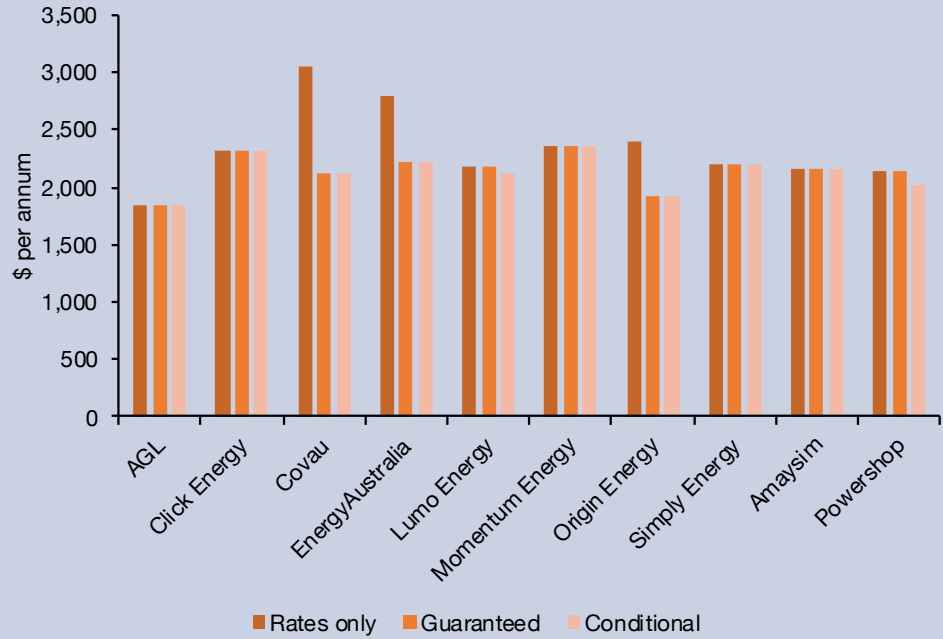
Energy Australia, Origin and Covau offer guaranteed discounts while Lumo, Powershop and Red Energy offer discounts that are conditional upon the bills being paid on time. The remaining retailers (AGL, Click Energy, Momentum, Simply Energy and Amaysim) do not offer any additional discounts.

Charts 63 - 70 show annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts in the each of the eight gas pricing zones.

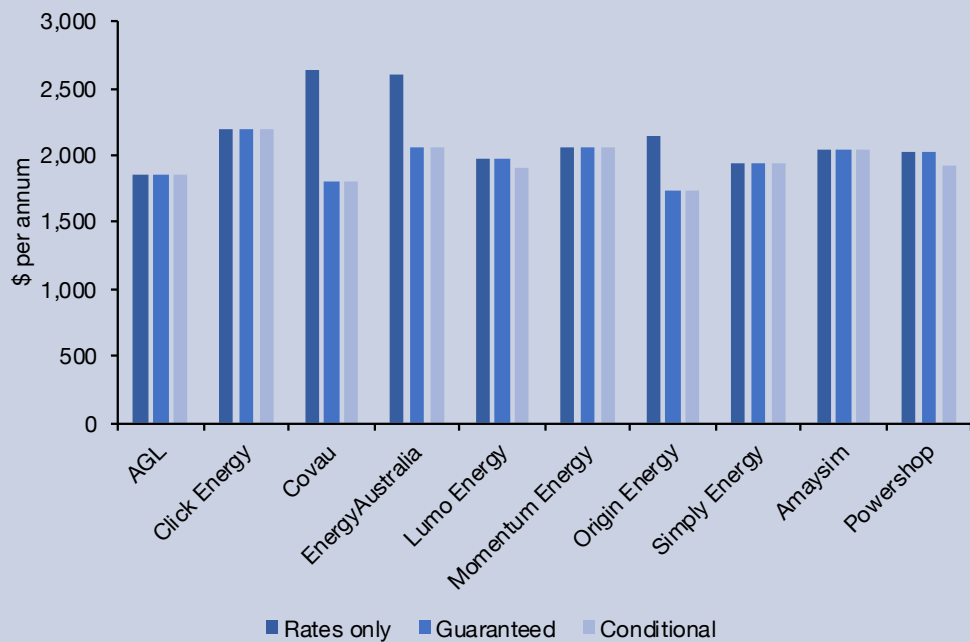
The Charts show that Covau and Energy Australia’s guaranteed discounts are more than \$500 per annum for customers with this consumption level across all pricing zones. The greatest discounts (\$940) are offered to Covau’s customers in the AGN gas zones. AGL, on the other hand, is the retailer with the lowest base rates in all pricing zones.



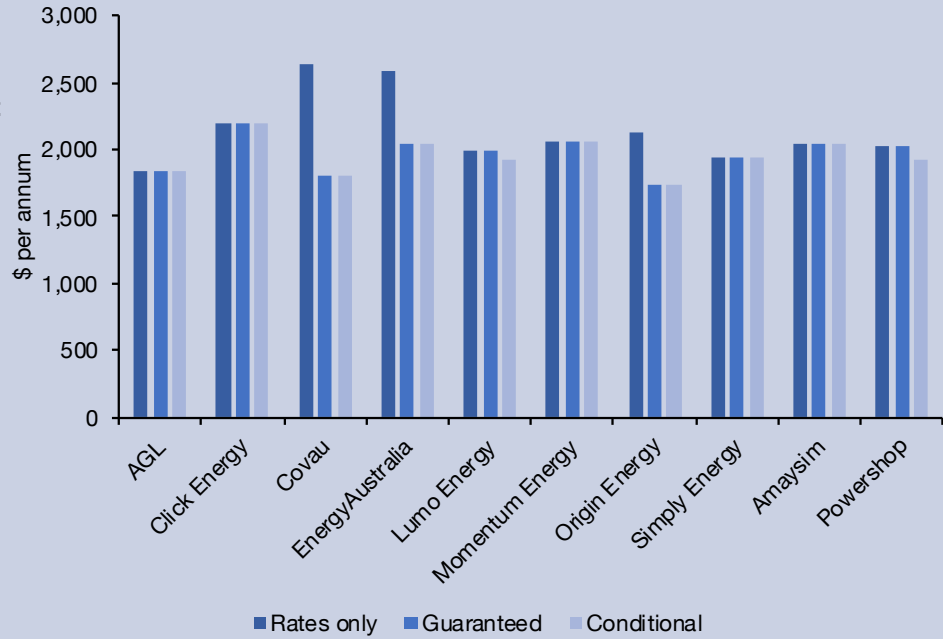
**CHART 64 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Multinet 2 gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



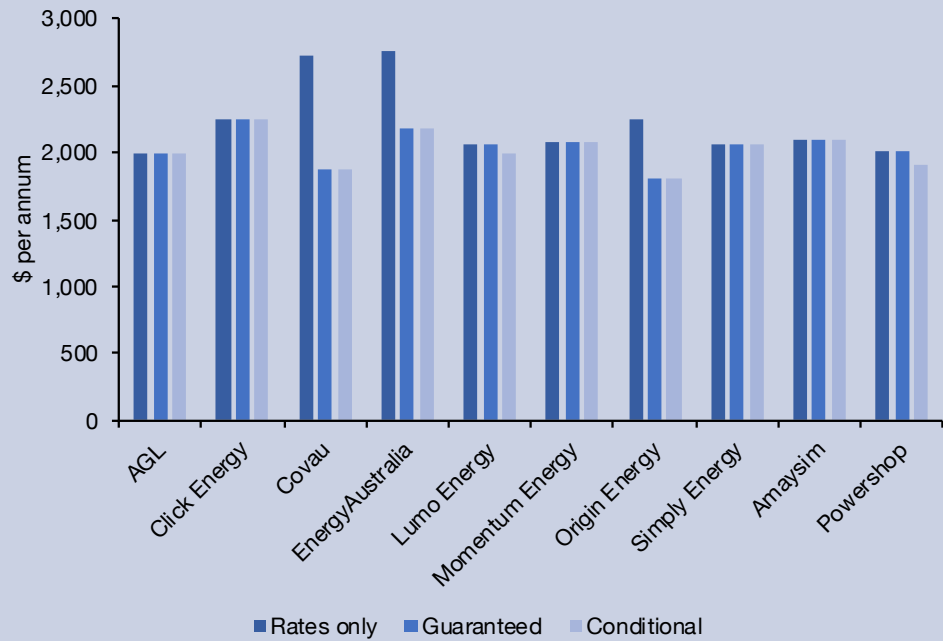
**CHART 65 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services Central 1 gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



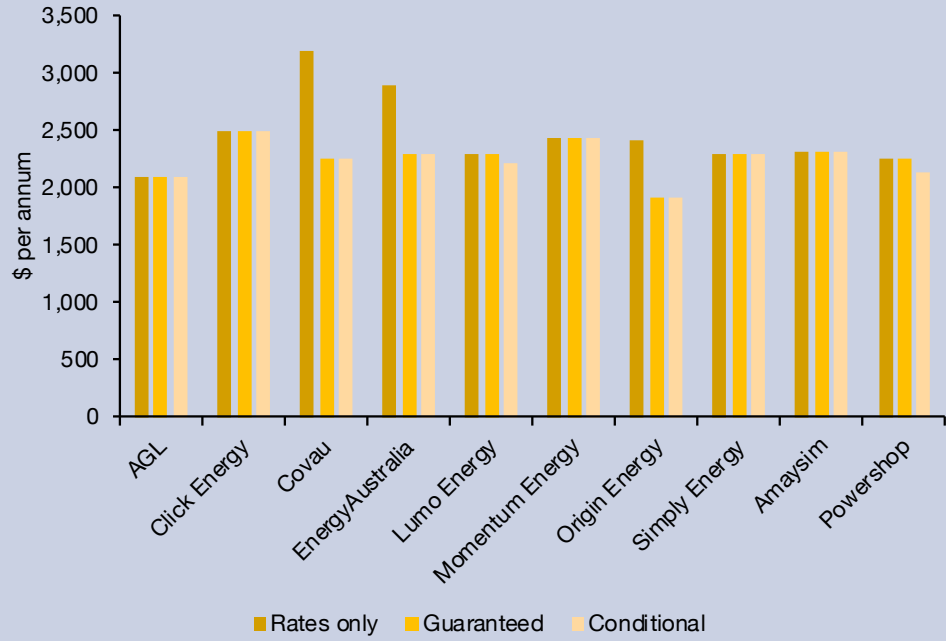
**CHART 66 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services Central 2 gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



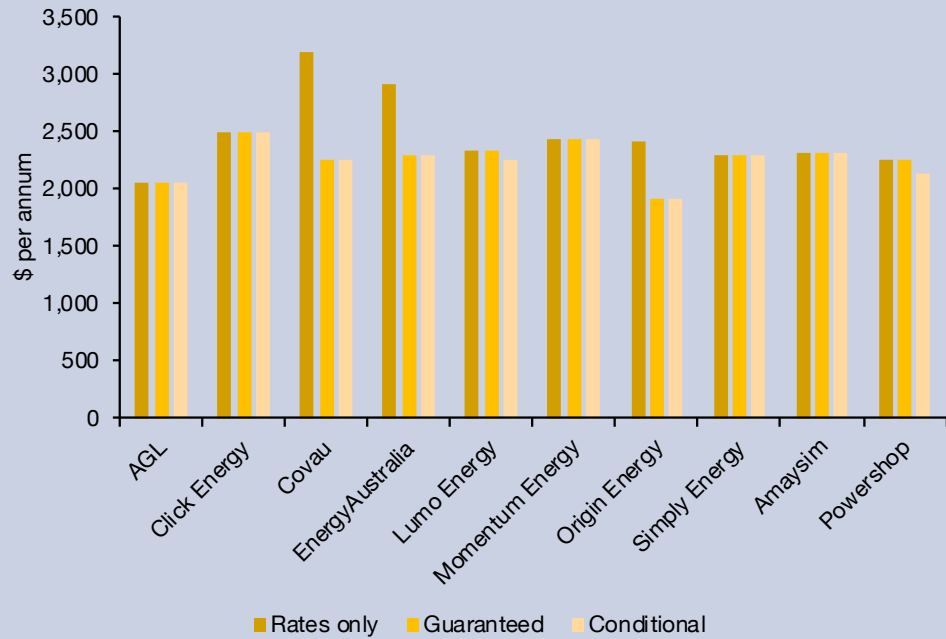
**CHART 67 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services West gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



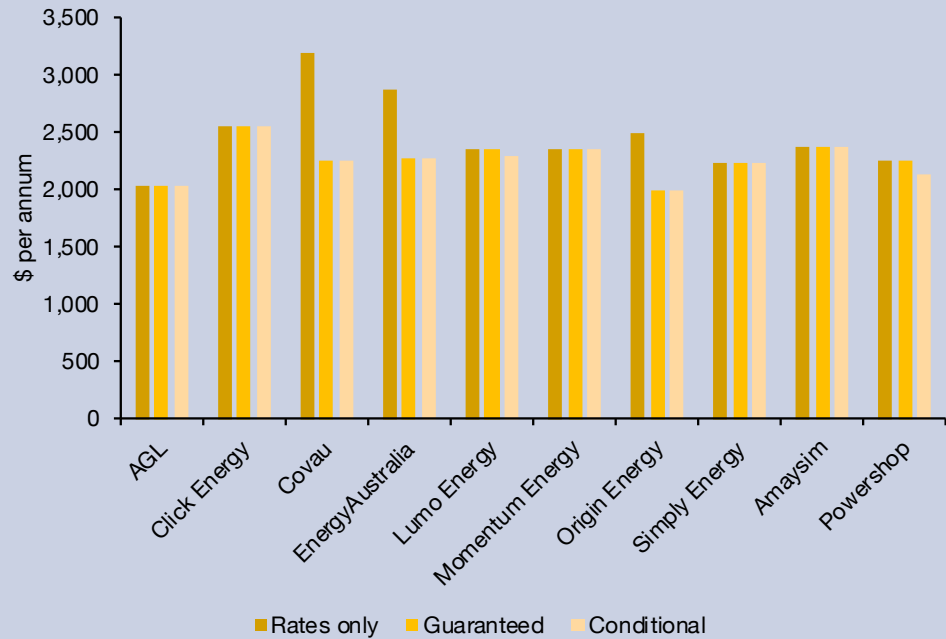
**CHART 68 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN Central 1 gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



**CHART 69 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN Central 2 gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



**CHART 70 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN North gas zone. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



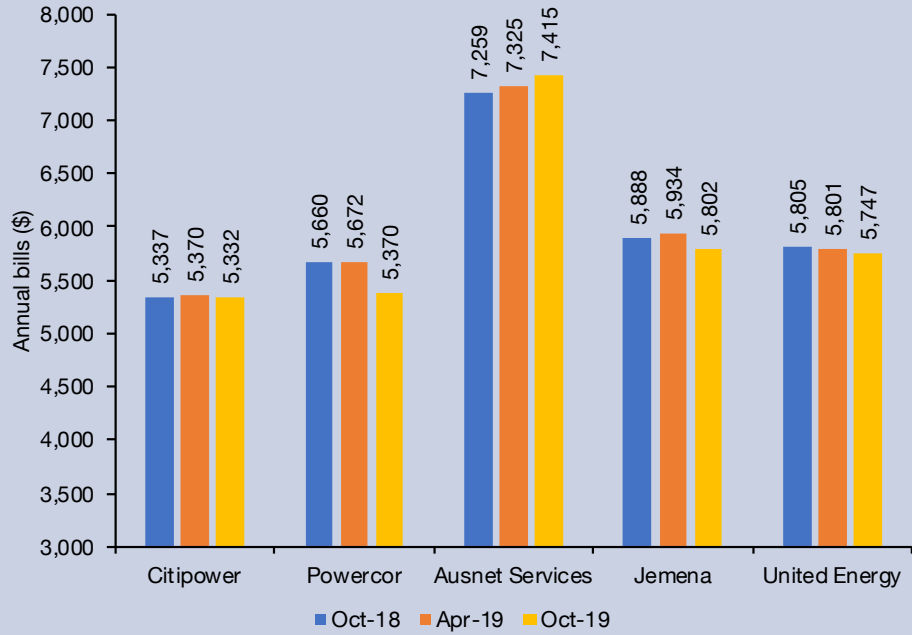
### 4.2.3 Changes in energy bills in Victoria

The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2019.

Victorian electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during this period. However, many retailers have still changed their offers (rates, discounts or both).

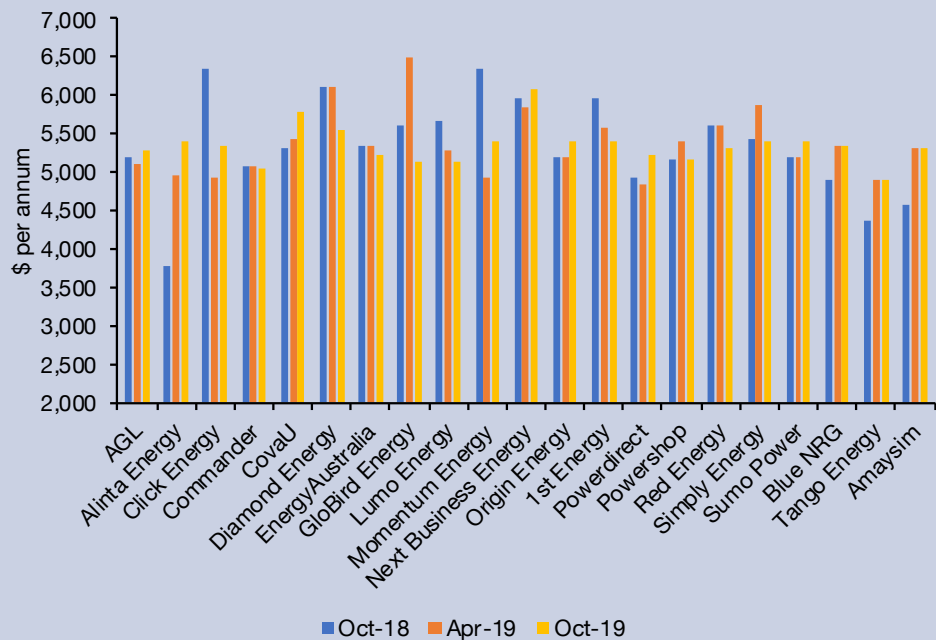
From April 2019 to October 2019, average retail electricity bills for SMEs consuming 20,000 kWh per annum (single rate) decreased by around -1% in the Jemena and United Energy network areas and by approximately -5% in Powercor. In Citipower the average bill remained unchanged while it increased by 2% in the Ausnet Services network. Chart 71 below shows average annual bills as of October 2018, April 2019 and October 2019.

**CHART 71 |** Average annual electricity bills as of October 2018, April 2019 and October 2019 including guaranteed discounts and pay on time discounts. Annual bills based on market offers, single rate, 20,000 kWh per annum and GST inclusive.

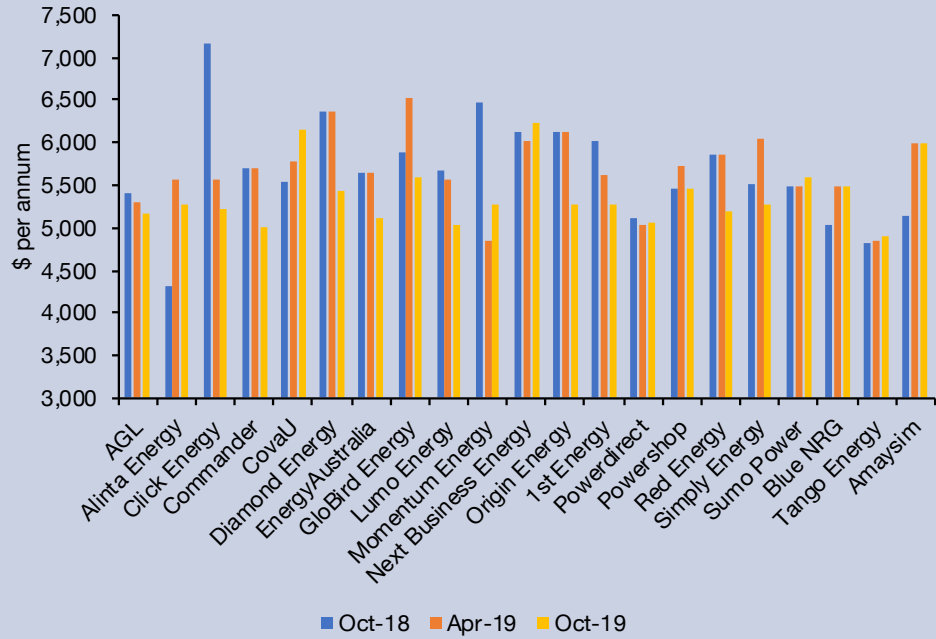


In terms of individual retailers, Click Energy, Diamond Energy, GloBird Energy, Momentum and 1st Energy’s offers produce lower bills in October 2019 compared to six months ago (April 2019) in all network areas. It should be noted, however, that these decreases are not always caused by lower base rates. Some offers have been discontinued, new offers have been introduced and others have changed their discounts.

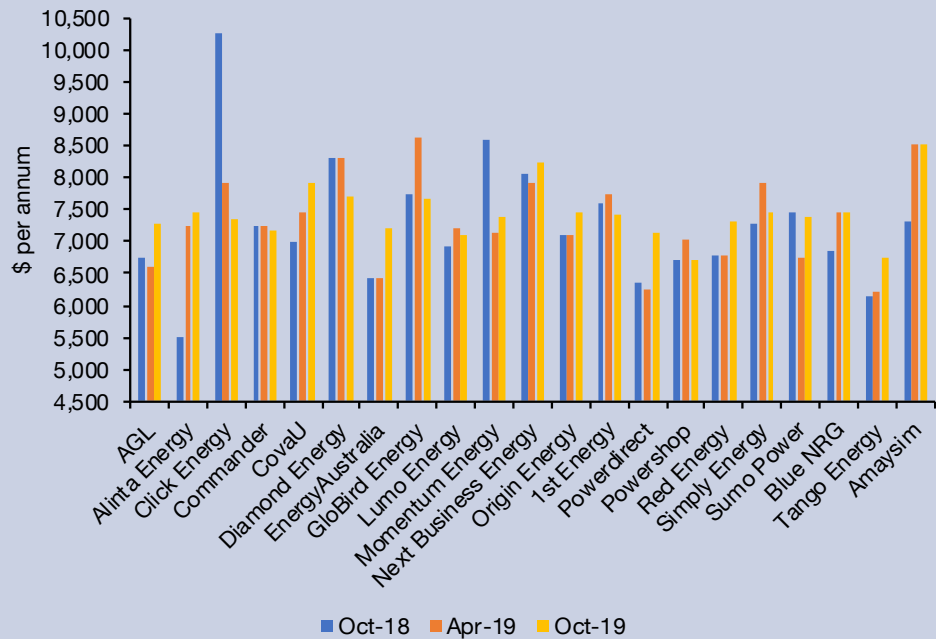
**CHART 72 |** Electricity bills including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 in Citipower’s network area. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



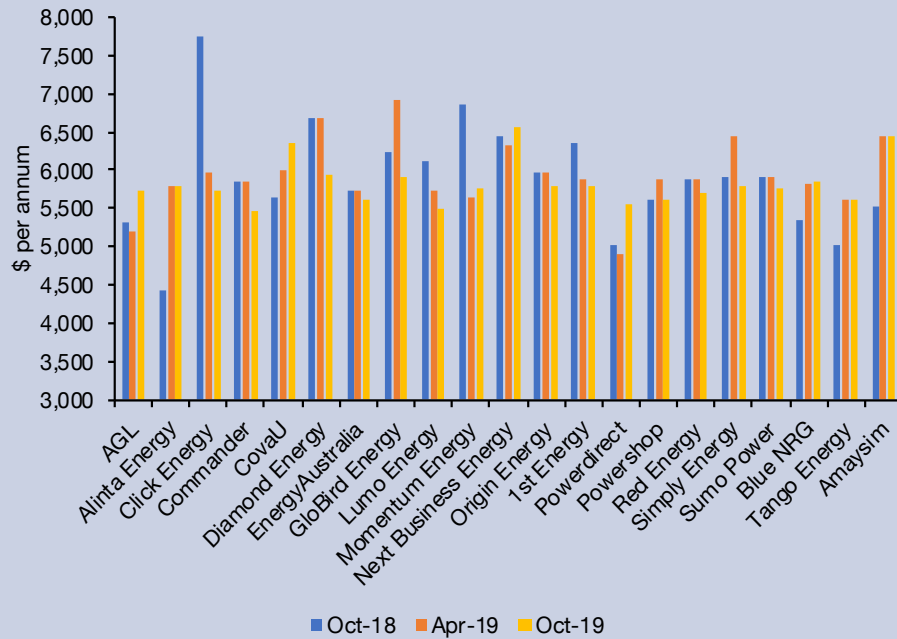
**CHART 73 |**  
**Electricity bills**  
 including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 in **Powercor's network area**. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



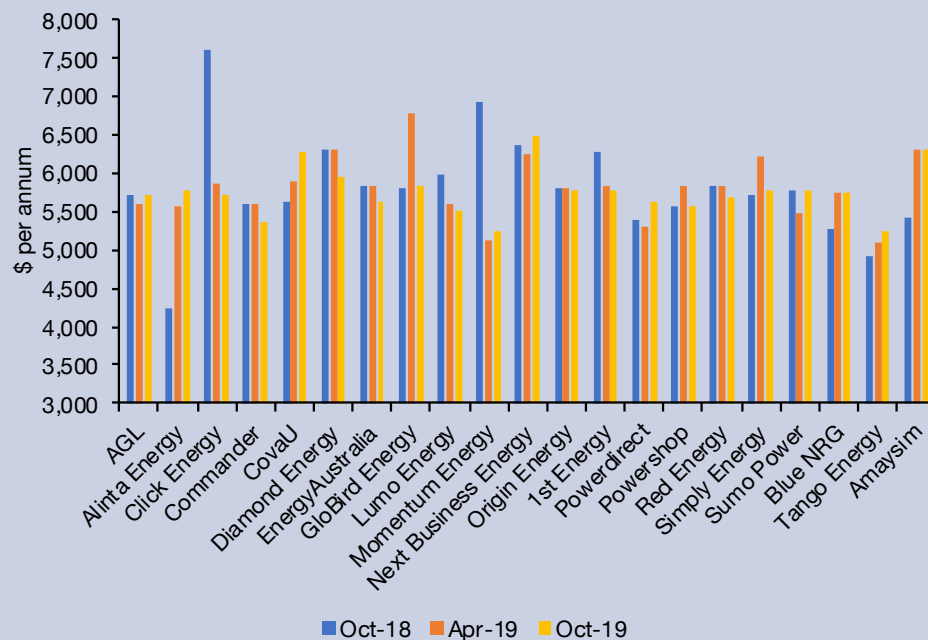
**CHART 74 |**  
**Electricity bills**  
 including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 in **Ausnet Services' network area**. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



**CHART 75 | Electricity bills including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 in Jemena's network area. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



**CHART 76 | Electricity bills including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 in United Energy's network area. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.**

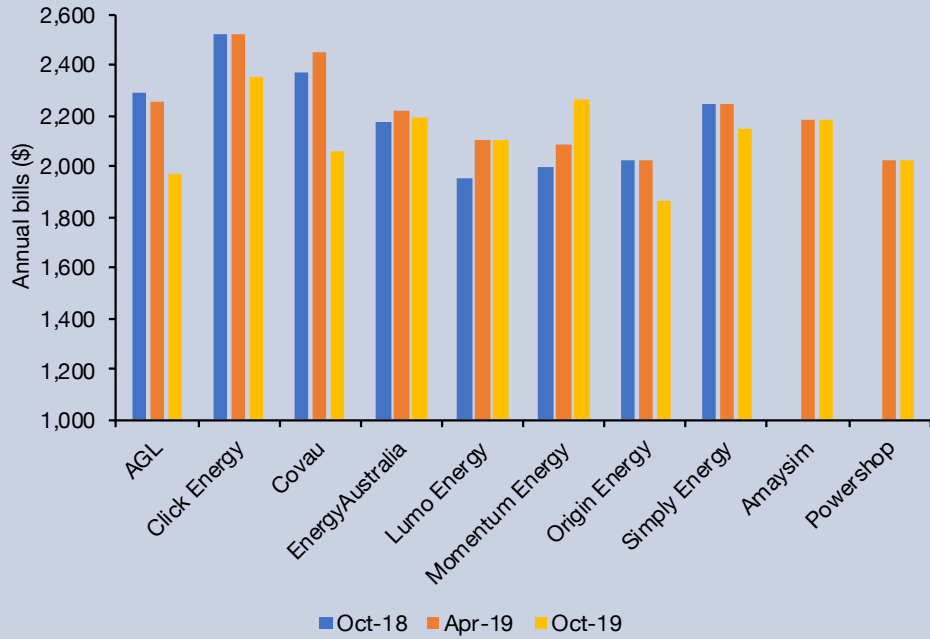


On average, annual gas bills for businesses using 100 GJ per annum decreased by -4% between April 2019 and October 2019.<sup>78</sup> Chart 77 shows retailers average annual gas bills (across all gas zones) as of October 2018, April 2019 and October 2019.

<sup>78</sup> The gas zones included in this analysis are: Multinet 1 and 2, AGN Central 1 and 2, AGN North, Ausnet Services Central 1 and 2, and Ausnet Services West.

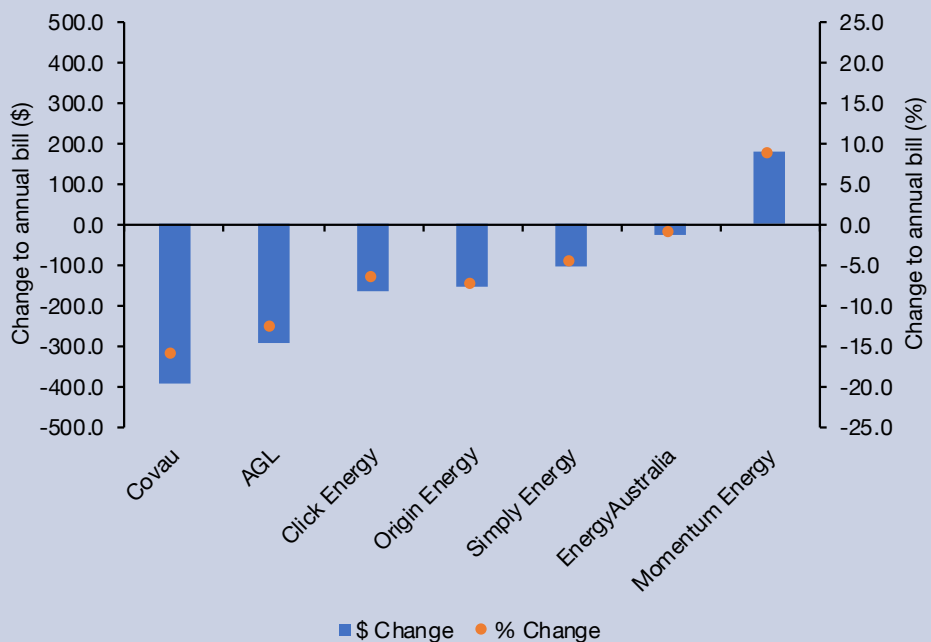


**CHART 77 | Average gas bills including guaranteed discounts and pay on time discounts, from October 2018 to October 2019 across eight gas zones. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 100 GJ per annum and GST inclusive.**



Seven of the retailers have changed their offers over the last six months (since April 2019). Covau, AGL, Click Energy, Origin Energy, Simply Energy and Energy Australia’s bills have decreased while Momentum’s bills have increased. Chart 78 below shows retailers’ changes to their average annual gas bill during this period.

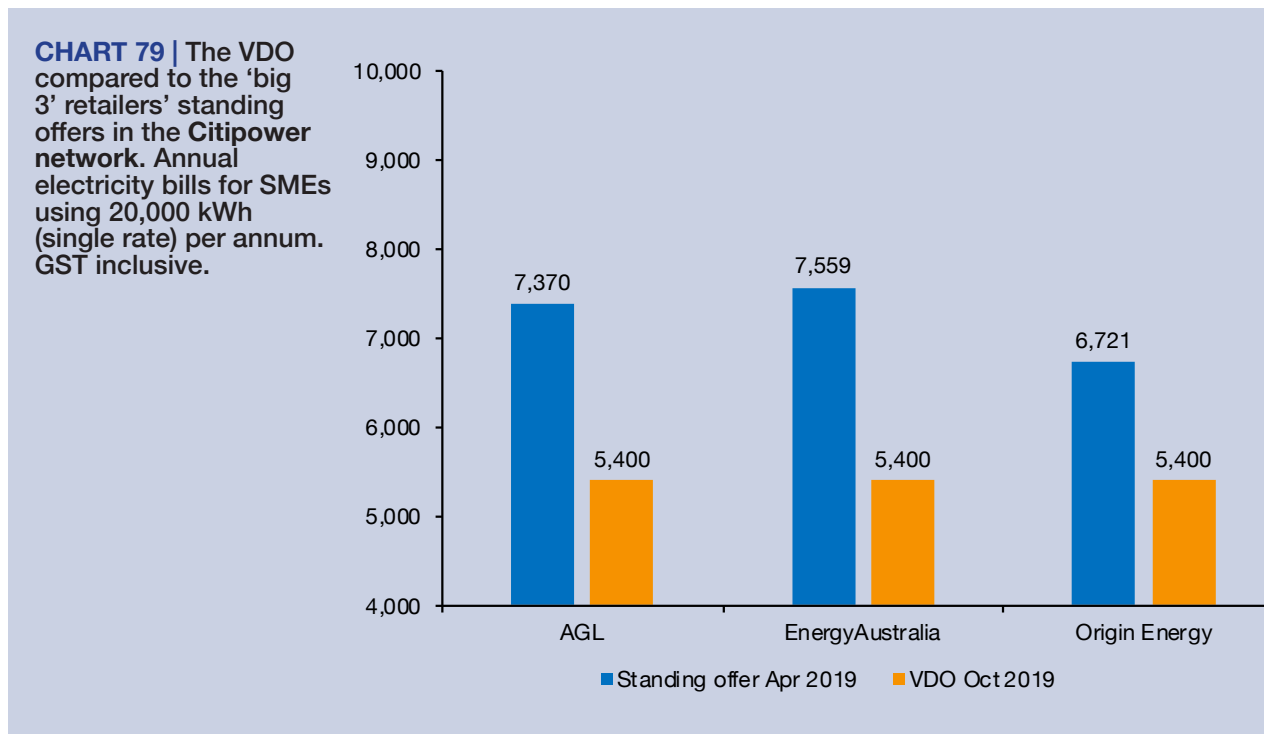
**CHART 78 | Bill change: Comparison of April 2019 and October 2019 average annual gas bills including guaranteed discounts and pay on time discounts in eight gas zones. Annual bills based on market offers as of April 2019 and October 2019, 100 GJ per annum and GST inclusive.**



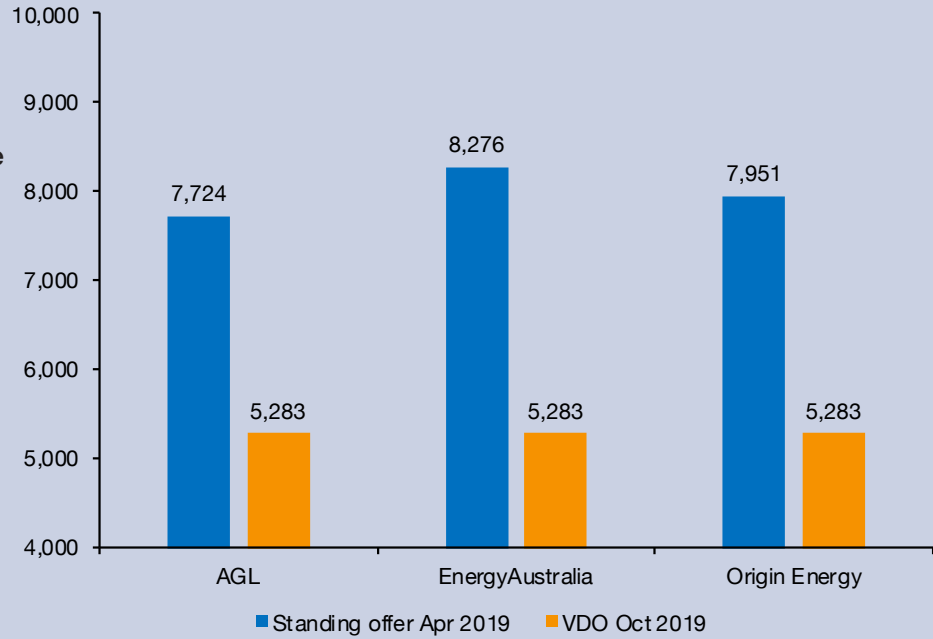
#### 4.2.4 Impact of the VDO

Since the introduction of the VDO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously. Furthermore, as shown in section 4.2.3 above, the average market offer bill has decreased in three out of five network areas but some retailers have market offers that produce higher bills in October 2019 compared to six months ago (April 2019). Section 4.2.1 above found that while some market offers produce bills that are lower than the VDO, Covau and Next Business Energy's offers are consistently higher than the VDO. In the case of Powershop, Red Energy, Diamond Energy and GloBird, customers need to obtain the conditional discounts in order to have bills that are below or similar to the VDO.

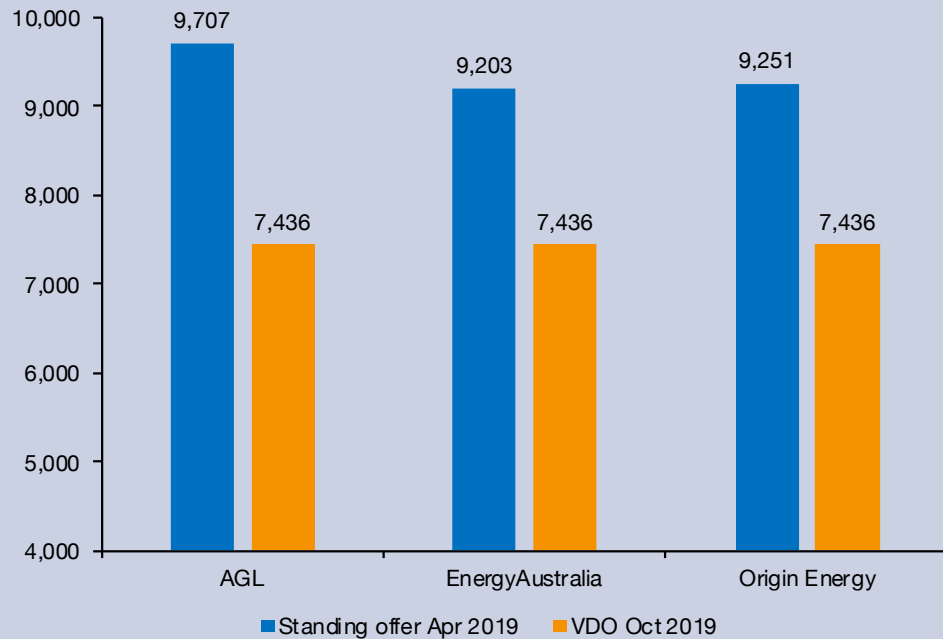
Businesses previously on a standing offer with one of the 'big 3' retailers (AGL, Energy Australia and Origin Energy) will have experienced significant bill reductions since the introduction of the VDO. Charts 79 – 83 below compare AGL, Energy Australia and Origin Energy's standing offers prior to the VDO taking effect to the current VDO. They show that the bill reduction for businesses using 20,000 kWh per annum is between \$1,320 and \$2,995 (depending on the network and retailer). Energy Australia's bill in Powercor has reduced the most (by more than \$2,995) while Energy Australia's bill reduction in the Ausnet Services network, where it is the incumbent retailer, is more moderate (approximately \$1,765).



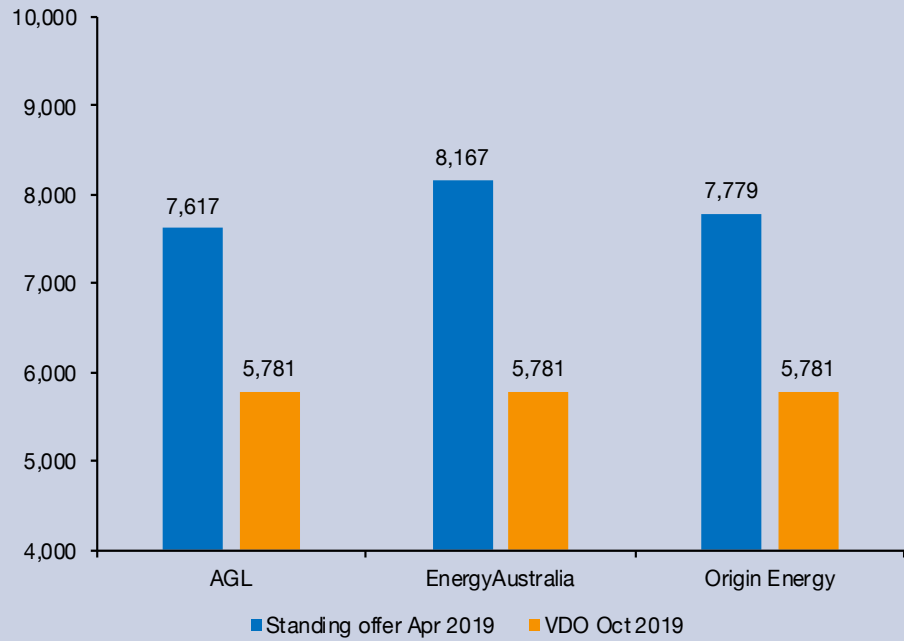
**CHART 80 |** The VDO compared to the 'big 3' retailers' standing offers in the Powercor network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



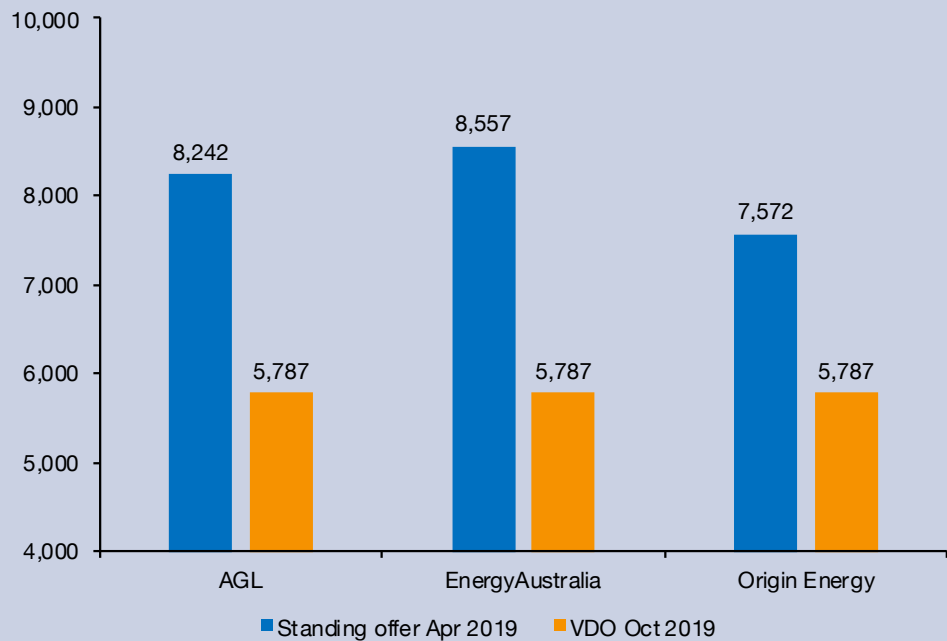
**CHART 81 |** The VDO compared to the 'big 3' retailers' standing offers in the Ausnet Services network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



**CHART 82** | The VDO compared to the 'big 3' retailers' standing offers in the **Jemena network**. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



**CHART 83** | The VDO compared to the 'big 3' retailers' standing offers in the **United Energy network**. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



## 4.3 Queensland

Electricity prices in South East Queensland has been deregulated since July 2016 but on 1 July 2019 the Australian Energy Regulator's Default Market Offer (DMO) replaced the previously retailer determined electricity standing offers in South East Queensland. The Queensland Competition Authority (QCA) does, however, still regulate retail prices for customers of Ergon Energy (Retail). Gas retail prices have been deregulated since 2007.

Queensland has two electricity networks, Energex in South East Queensland and Ergon Energy in Northern and regional Queensland. There is currently no effective retail competition for SME customers in regions supplied by the Ergon Energy network business. Queensland also has four gas pricing zones.

Queensland's two electricity networks and four gas pricing zones:

Electricity network and incumbent retailer	
Energex	South East Queensland
Ergon Energy	Regional and Northern Queensland

Gas zones	
Allgas – Brisbane South	South Brisbane, Gold Coast, Toowoomba and Oakey
AGN – Brisbane North	North Brisbane and Ipswich
AGN - Northern	Rockhampton and Gladstone
AGN – Wide Bay	Bundaberg, Maryborough and Hervey Bay

### 4.3.1 Queensland electricity bills October 2019

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>79</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Energex network is 16,678 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

#### **The price-spread**

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$5,300.<sup>80</sup> Chart 84 shows annual bills for sixteen retailers in South East

<sup>79</sup> T Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

<sup>80</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

Queensland (Energex network) and that the maximum price spread is approximately \$1,325 per annum.

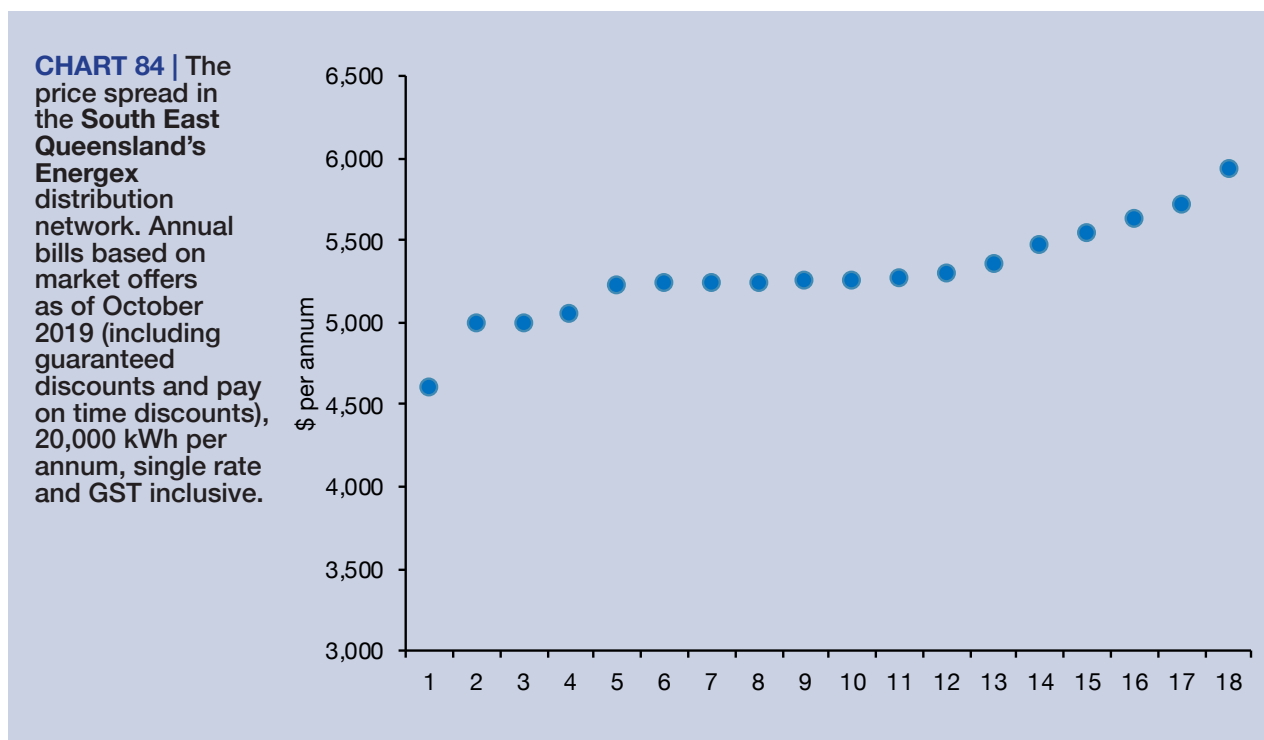



















Figure 18 below ranks the retail offers from lowest to highest annual electricity bills.<sup>81</sup>

**FIGURE 18 | Lowest to highest annual bills (incl GST) for market offers in Queensland's Energex network (October 2019)**

*Including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)*

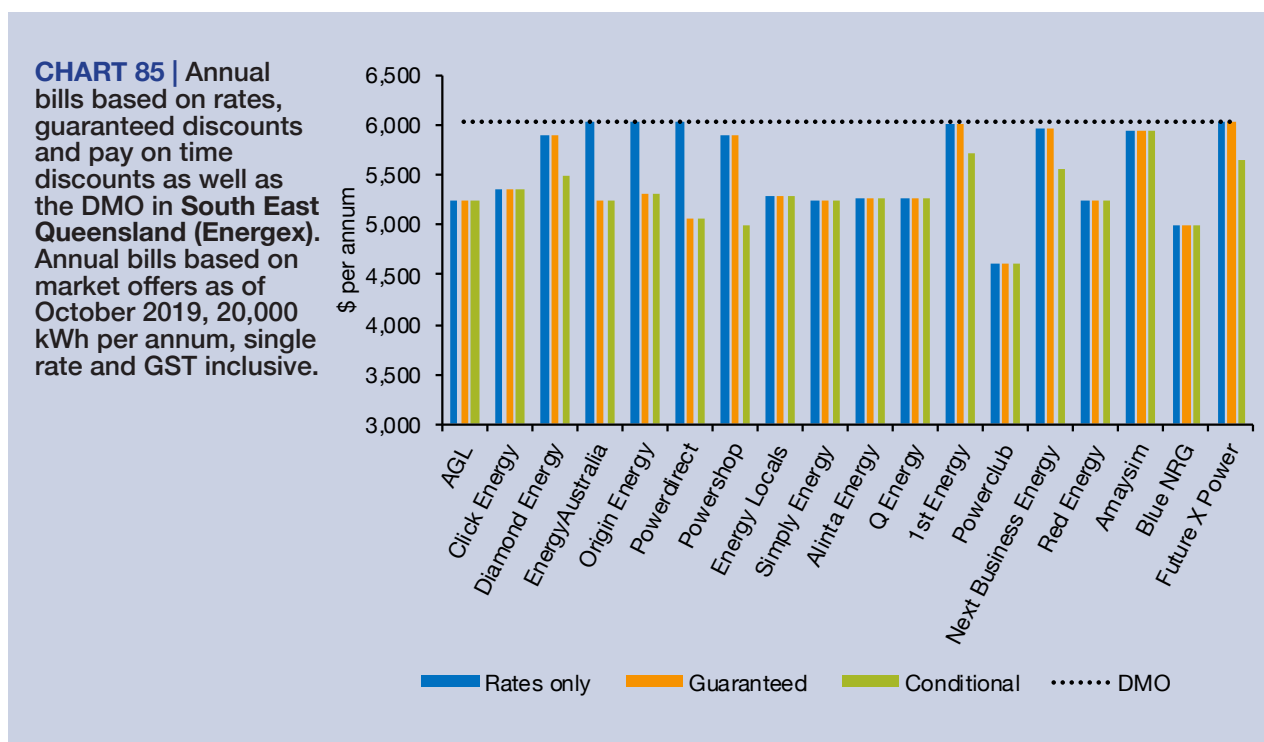
	Powerclub	<b>\$4,609</b>		EnergyLocals	<b>\$5,277</b>
	BlueNRG	<b>\$4,990</b>		Origin Energy	<b>\$5,301</b>
	Powershop	<b>\$5,000</b>		ClickEnergy	<b>\$5,361</b>
	Powerdirect	<b>\$5,059</b>		Diamond Energy	<b>\$5,478</b>
	Simply Energy	<b>\$5,228</b>		Next Business Energy	<b>\$5,548</b>
	AGL	<b>\$5,238</b>		Future X Power	<b>\$5,636</b>
	EnergyAustralia	<b>\$5,241</b>		1st Energy	<b>\$5,715</b>
	Q Energy	<b>\$5,252</b>		Amaysim	<b>\$5,936</b>
	Alinta Energy	<b>\$5,259</b>			

### Additional discounts

Eight out of the eighteen retailers operating in South East Queensland offer additional discounts. Energy Australia, Origin and Powerdirect offer guaranteed discounts while

<sup>81</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

the remaining five retailers (1st Energy, Powershop, Diamond, Next Business Energy and future X power) offer discounts conditional upon bills being paid on time.<sup>82</sup> In the case of Powershop, which offers 15% off pre-purchased “specials”, conditional discount can be worth up to \$880 per annum for customers using 20,000 kWh/annum. Chart 85 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discount. The chart also compares the market offers to the DMO and it shows that all of the market offers produce bills that are lower than the DMO.



### Network charges

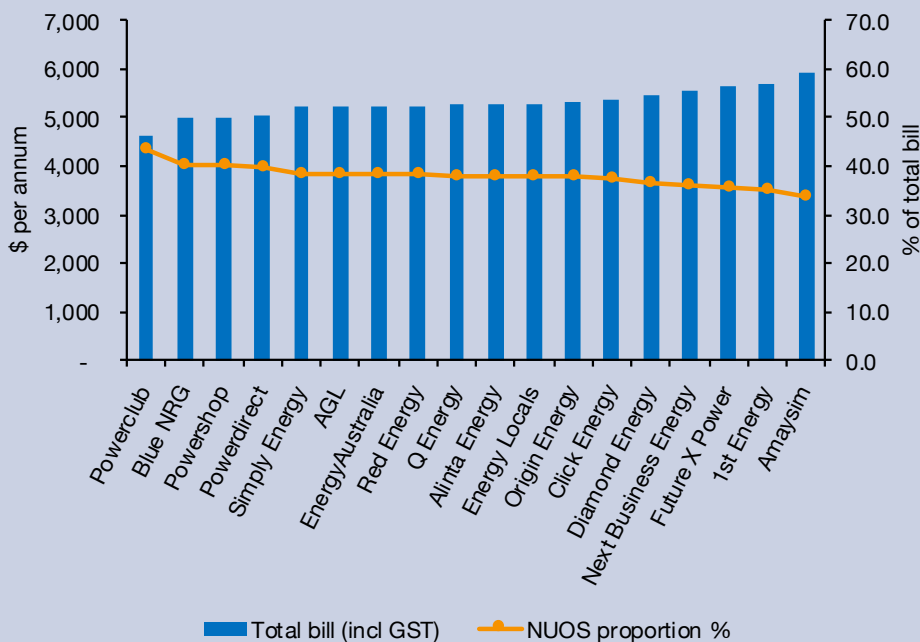
The South East Queensland electricity network, Energex, introduces new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs.

The chart presented in this section shows that the NUOS proportion of bills varies significantly between retail offers. The NUOS proportion of bill for Powerclub is 43.4% while the NUOS only comprises 33.7% of the total bill for Amaysim customers.

Charts 86 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

<sup>82</sup> Note that Powershop’s conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing “specials”.

**CHART 86 | South East Queensland (Energex): Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>83</sup>**



## **Regional Queensland**

There is no effective retail competition in regional and northern Queensland (customers supplied by the Ergon Energy network) and small businesses in this area are therefore charged based on the regulated prices determined by the Queensland Competition Authority. As customers in the Ergon Energy network are generally unable to access discounted market offers by competitive retailers, they may pay more for electricity compared to businesses in South East Queensland.

Chart 87 shows that the average market offer in the Energex network (including discounts) is \$575 less than the regulated offer in the Ergon Energy network for businesses using 20,000 kWh per annum.

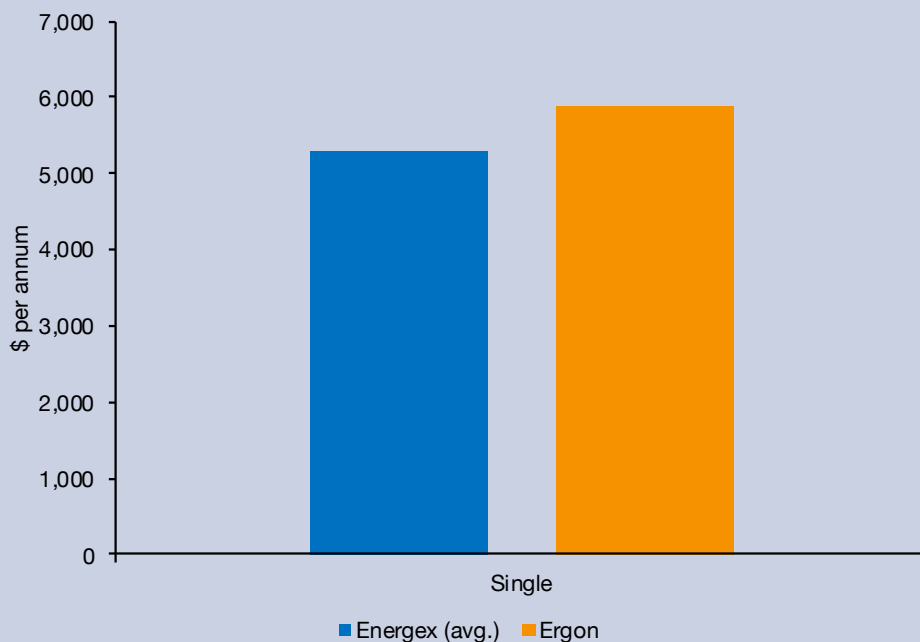
It is important to note that in determining the regulated retail rates for small customers in regional Queensland, the Queensland Competition Authority are required to use the equivalent Energex network rate, so that customers in regional Queensland pay a similar amount to customers in South East Queensland. The difference in the cost of supply is paid to the Ergon Energy retailer as a community service obligation by the Queensland Government.<sup>84</sup>

<sup>83</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Energex’s charges (tariff NTC 8500) for the 2019/20 financial year. The NUOS also includes fixed charges.

<sup>84</sup> QCA, *SEQ retail electricity market monitoring: 2016–17*, November 2017



**CHART 87 | Annual bills for the single rate tariff in the Energex and Ergon Energy networks. Annual bills based on the regulated offer (Ergon Energy) and market offers including discounts (Energex) as of October 2019, 20,000 kWh per annum and GST inclusive.**



### **4.3.2 Queensland gas bills October 2019**

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

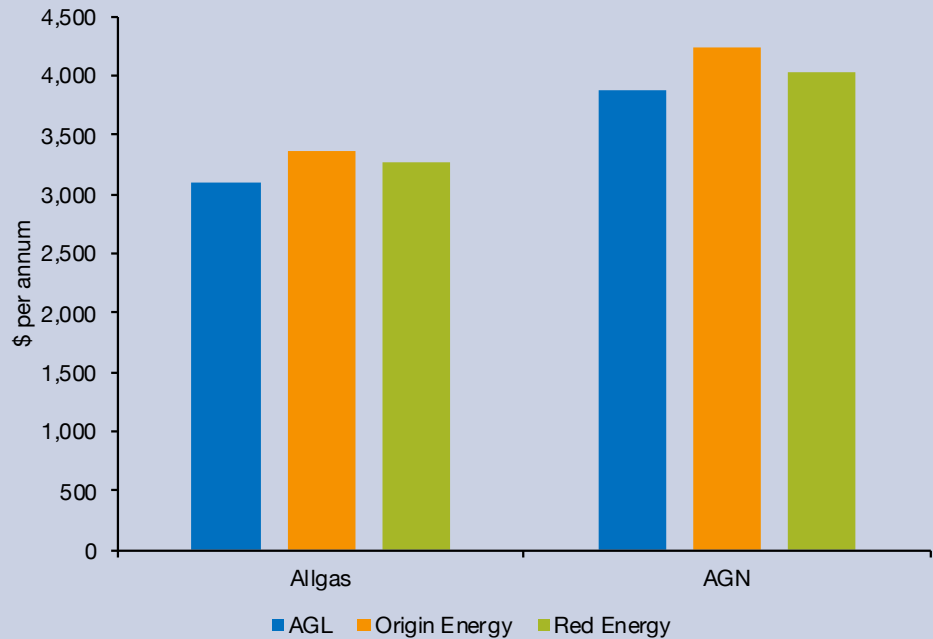
#### **The price-spread**

There are two main gas zones in Queensland: the Allgas zone covering South Brisbane, Gold Coast, Toowoomba and Oakey, and the Australian Gas Networks (AGN) zone covering North Brisbane and Ipswich. AGL, Origin and Red Energy have market offers in both areas. AGN also has two other pricing zones: Northern covering Rockhampton and Gladstone, and Wide Bay covering Bundaberg, Maryborough and Hervey Bay. Origin is the only retailer that offers contracts in both of these pricing zones while AGL has offers in the Hervey Bay area. Origin Energy is currently the only gas retailer that offers additional discounts (a guaranteed 6% off bills).

The typical annual market offer bill for SMEs consuming 100 GJ per annum is approximately \$3,245 (including discounts) in the Allgas zone and \$4,050 in the AGN zone. This is a significant difference for two gas zones that cover neighbouring areas. Chart 88 shows AGL, Origin and Red Energy's annual bills for the two pricing zones.<sup>85</sup>

<sup>85</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

**CHART 88 | Gas bills in Queensland's Allgas and AGN pricing zones. Annual bills based on market offers as of October 2019 (including guaranteed discounts), 100 GJ per annum and GST inclusive.**



Figures 19 - 20 below rank the retail offers from lowest to highest annual gas bills in the two main pricing zones.<sup>86</sup>

**FIGURE 19 | Lowest to highest annual bills (incl GST) for market offers in the Allgas pricing zone (October 2019).**

*Bills including guaranteed discounts - SMEs consuming 100 GJ per annum*

	AGL	<b>\$3,106</b>
	Origin Energy	<b>\$3,361</b>

**FIGURE 20 | Lowest to highest annual bills (incl GST) for market offers in the AGN pricing zone (October 2019).**

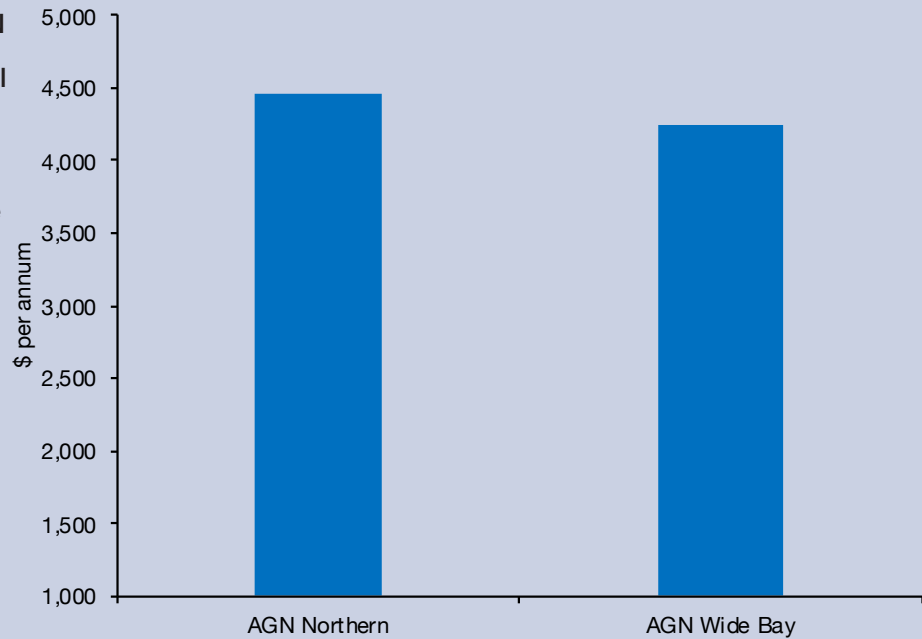
*Bills including guaranteed discounts - SMEs consuming 100 GJ per annum*

	AGL	<b>\$3,880</b>
	Origin Energy	<b>\$4,238</b>

In the two smaller AGN pricing zones (Northern and Wide Bay), Origin Energy's annual bills for this consumption level amount to approximately \$4,465 and \$4,240 respectively. However, AGL does have an offer in Hervey Bay pricing zone and it produces an annual bill that is almost \$360 less than Origin's offer.

<sup>86</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

**CHART 89** | Origin gas bills in Queensland's AGN Northern and AGN Wide Bay pricing zones. Annual bills based on market offers as of October 2019 (including guaranteed discounts), 100 GJ per annum and GST inclusive



### 4.3.3 Changes in energy bills in Queensland

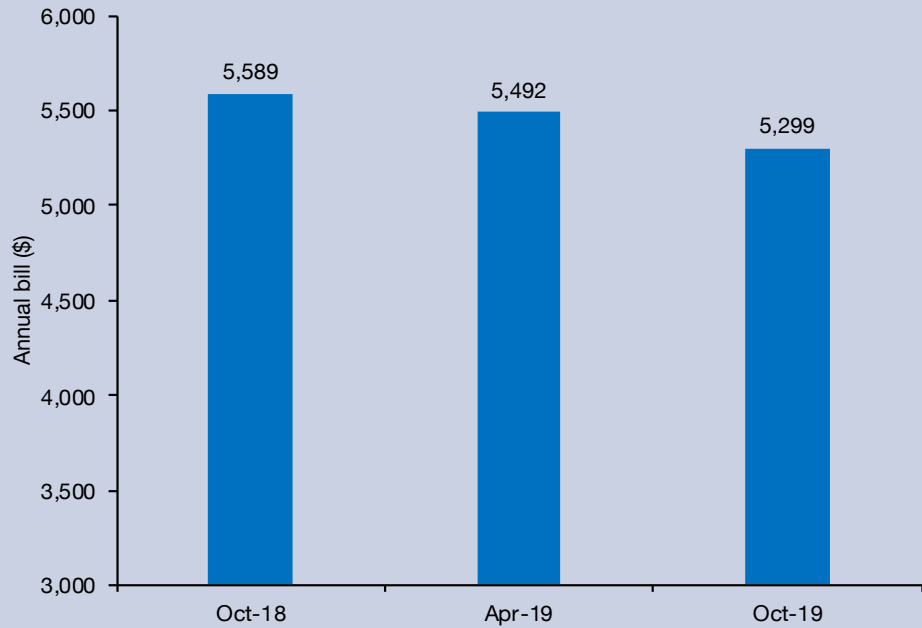
This section compares annual energy bills as of October 2019 to bills as of April 2019.<sup>87</sup> The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2019.

In Queensland, new network tariffs took effect in July 2019 meaning that the electricity retail prices have been affected by an underlying price reset in this six month period. Most of the retailers have thus changed their offers (rates, discounts or both). It should be noted, however, that these changes are not always caused by higher base rates. Some offers have been discontinued, new offers have been introduced and others have changed their discounts.

The average annual market offer bill has decreased by \$195 (or -3.5%) in the Energex network since April 2019. Chart 90 below shows average annual bills as of October 2018, April 2019 and October 2019.

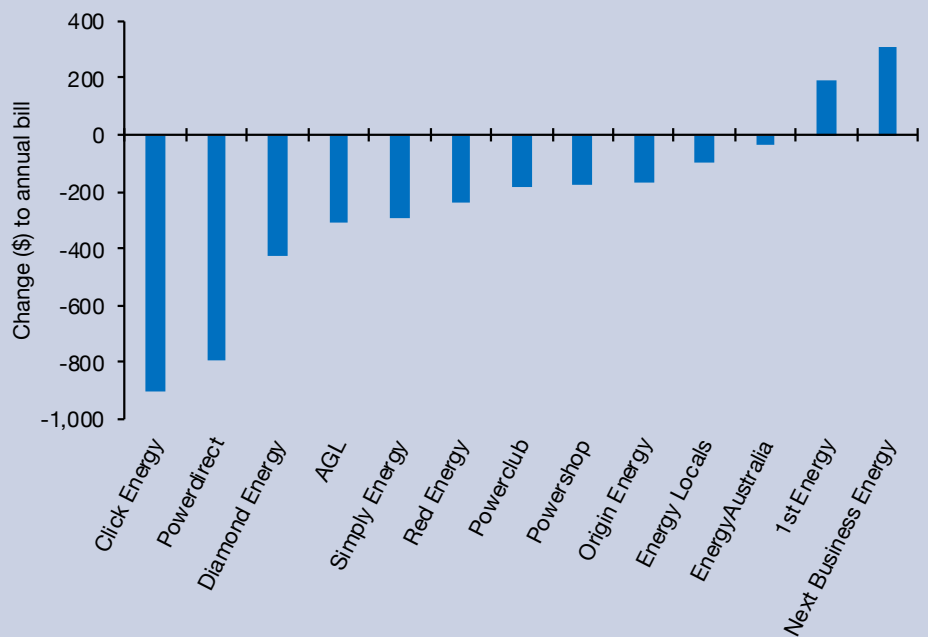
<sup>87</sup> Note that these price changes may differ from the overall averages in the national comparison (section 3 above). This is because the average bill in this section is based on retailers offering retail contracts as of both October 2019 and April 2019 while the national comparison includes retailers all retailers offering retail contracts as of October 2019 and April 2019.

**CHART 90 |** Average annual electricity bills as of October 2018, April 2019 and October 2019 including guaranteed discounts and pay on time discounts in the Energex network. Annual bills based on market offers, single rate, 20,000 kWh per annum and GST inclusive.



Eleven retailers have decreased their prices since April 2019, two have increased theirs and three retailers have not changed their offers. Chart 91 below shows changes to annual bills for each retailer from April 2019 to October 2019.<sup>88</sup>

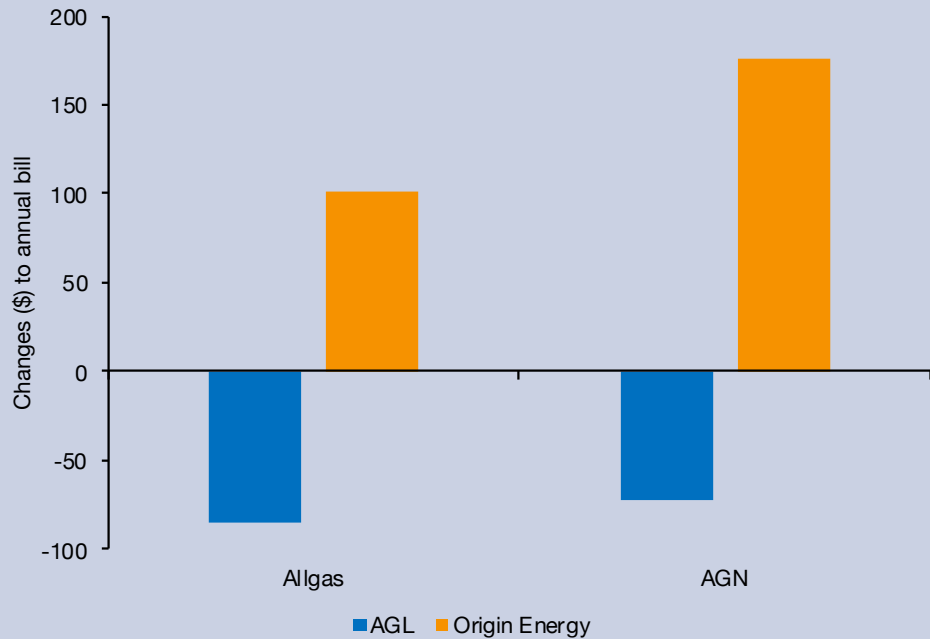
**CHART 91 |** Bill change: Comparison of April 2019 and October 2019 annual electricity bills including guaranteed discounts and pay on time discounts in the Energex network. Annual bills based on market offers as of April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



In relation to gas, Origin's bills have increased by 3-4% since April 2019 while AGL's annual bills decreased by approximately -2%.

<sup>88</sup> Based on market offers inclusive of guaranteed and conditional pay on time discounts.

**CHART 92 | Bill change:** Comparison of April 2019 and October 2019 annual gas bills including guaranteed discounts and pay on time discounts in the Allgas and AGN pricing zones. Annual bills based on market offers as of April 2019 and October 2019, 100 GJ per annum and GST inclusive.



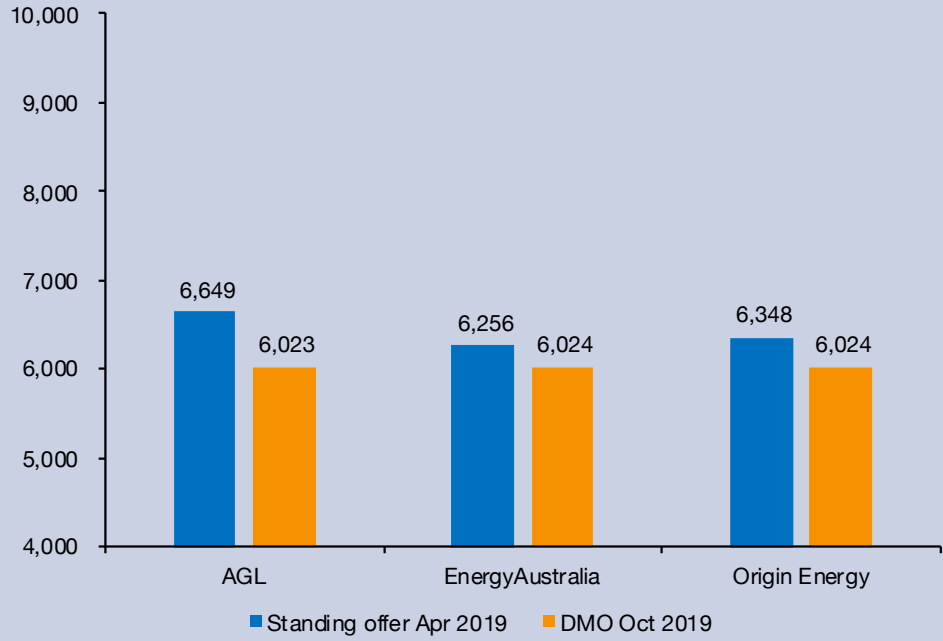
#### **4.3.4 Impact of the DMO**

The introduction of the DMO on 1 July 2019 has had little impact on additional discounting in South East Queensland. Most retailers that offered discounts prior to the DMO continue to do so, although the discounts are lower in some instances. Furthermore, as shown in section 4.3.3 above, the average market offer bill has decreased and only two have market offers that produce higher bills in October 2019 compared to six months ago (April 2019). Importantly, none of the retail market offers produce annual bills that are greater than the DMO (see section 4.3.1 above).<sup>89</sup>

Businesses previously on a standing offer with one of the ‘big 3’ retailers (AGL, Energy Australia and Origin Energy) will have experienced bill reductions since the introduction of the DMO. Chart 93 below compares AGL, Energy Australia and Origin Energy’s standing offers prior to the DMO taking effect to their current DMO offers. It shows that the bill reduction for businesses using 20,000 kWh per annum is between \$230 and \$625 (depending on the retailer). AGL’s bill has reduced the most (by approximately \$625) while Energy Australia and Origin Energy’s bill reductions are more modest at \$230 and \$325 respectively.

<sup>89</sup> Market offer bills including guaranteed discounts compared to the DMO.

**CHART 93** | The DMO compared to the 'big 3' retailers' standing offers in the Energex network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



## 4.4 South Australia

South Australia deregulated electricity and gas retail prices in 2013 but on 1 July 2019 the Australian Energy Regulator's Default Market Offer (DMO) replaced the previously retailer determined electricity standing offers in South Australia. SA Power Networks cover the entire state and AGL is the incumbent retailer. In relation to gas, there are several gas pricing zones, but as the incumbent retailer (Origin) does not currently differentiate its offers between these zones, this analysis compares gas offers in the AGN South Australia zone. That said, customers in regional areas such as Mt Gambier, Riverland and Whyalla may only be able to access Origin's market offer.

### **4.4.1 South Australian electricity bills October 2019**

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>90</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in South Australia Power Networks is 14,262 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

#### **The price-spread**

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$7,940.<sup>91</sup> Chart 94 shows annual bills for sixteen retailers in the SA Power Networks (SAPN) and that the maximum price spread is \$1,800 per annum. If we exclude the single lowest and single highest bills, however, the maximum price-spread is reduced to \$1,085.

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<sup>90</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

<sup>91</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

**CHART 94 |** The price spread in the South Australia's SAPN distribution network. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 20,000 kWh per annum, single rate and GST inclusive.

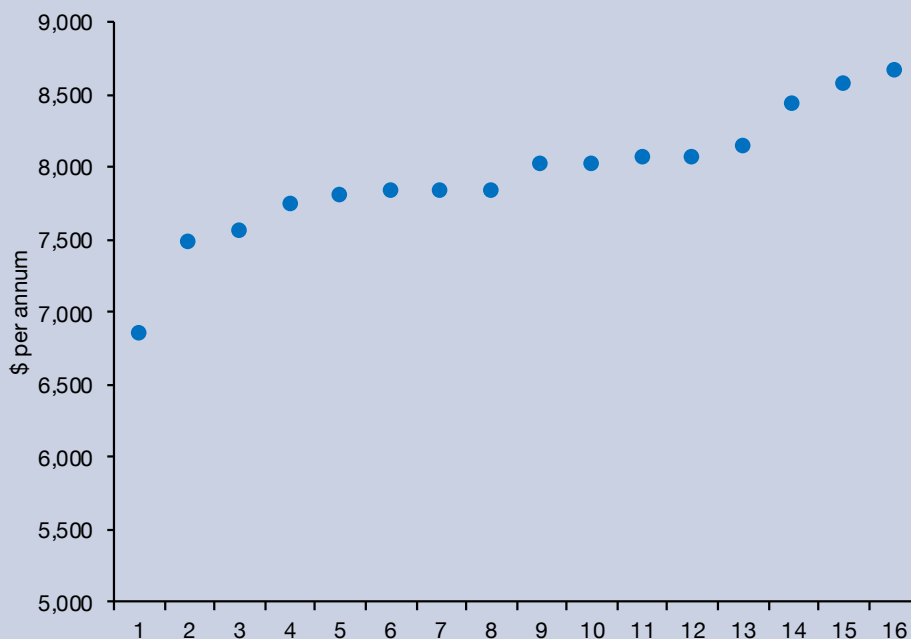








Figure 21 below ranks the retail offers from lowest to highest annual electricity bills.<sup>92</sup>

**FIGURE 21 |** Lowest to highest annual bills (incl GST) for **South Australian market offers** in October 2019

*Including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)*

	Powerclub	\$6,864		AGL	\$8,022
	Momentum Energy	\$7,492		Lumo Energy	\$8,022
	Powershop	\$7,571		Simply Energy	\$8,068
	Powerdirect	\$7,749		Red Energy	\$8,071
	Commander	\$7,809		Amaysim	\$8,151
	Alinta Energy	\$7,836		Diamond Energy	\$8,447
	ClickEnergy	\$7,842		BlueNRG	\$8,575
	Origin Energy	\$7,842		EnergyAustralia	\$8,662

### Additional discounts

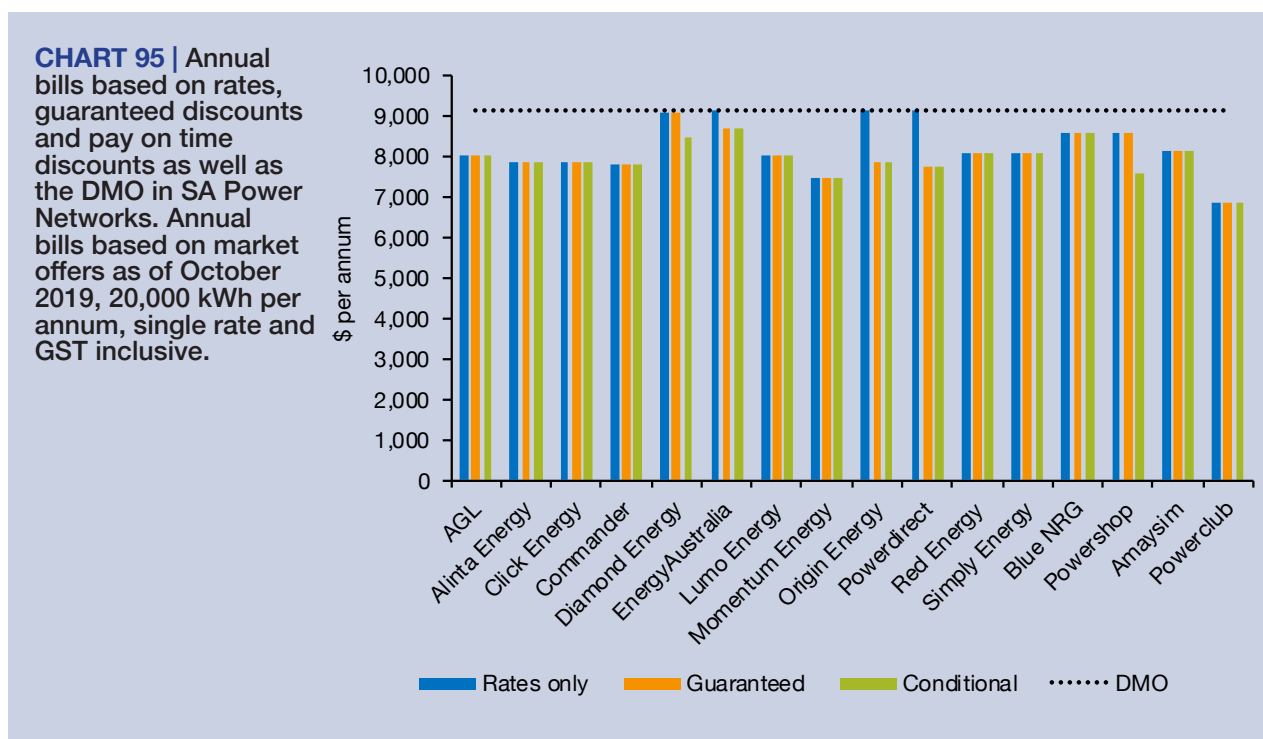
Currently, only two of the sixteen retailers operating in South Australia offer conditional pay on time discounts (Powershop and Diamond Energy). For customers using 20,000kWh per annum, this conditional discount can be worth as much as \$1,030 per annum (Powershop's offer).<sup>93</sup> Three other retailers (Energy Australia, Origin and

<sup>92</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

<sup>93</sup> Note that Powershop's conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing "specials".



Powerdirect) offer guaranteed discounts while the remaining eleven retailers do not offer any additional discounts. The practice of discounting has thus reduced significantly in South Australia. Chart 95 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts.<sup>94</sup> The chart also compares the market offers to the DMO and it shows that all of the market offers produce bills that are lower than the DMO.



### Network charges

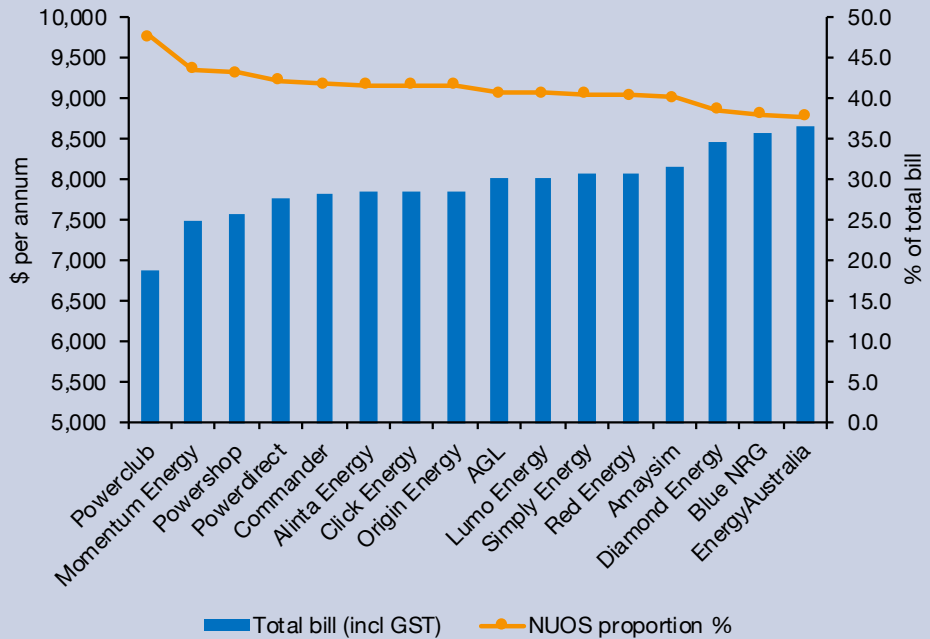
The South Australian electricity network, SA Power Networks, introduces new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs.

The chart presented in this section shows that the NUOS proportion of bills varies significantly between retail offers. The NUOS proportion of bill for Powerclub is 47.5% while the NUOS only comprises around 37.5% of the total bill for Energy Australia customers.

Chart 96 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

<sup>94</sup> Origin Energy and Powershop’s discounts are applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

**CHART 96 | South Australia (SAPN): Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019.** Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).<sup>95</sup>



#### 4.4.2 South Australian gas bills October 2019

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

##### The price-spread

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$3,435 (including discounts). Chart 97 shows annual bills for five retailers in South Australia and that the maximum price spread is approximately \$685 per annum.<sup>96</sup>

<sup>95</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the SAPN's charges for the 2019/20 financial year. The NUOS also includes fixed charges.

<sup>96</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

**CHART 97 |** The gas price spread in South Australia. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.

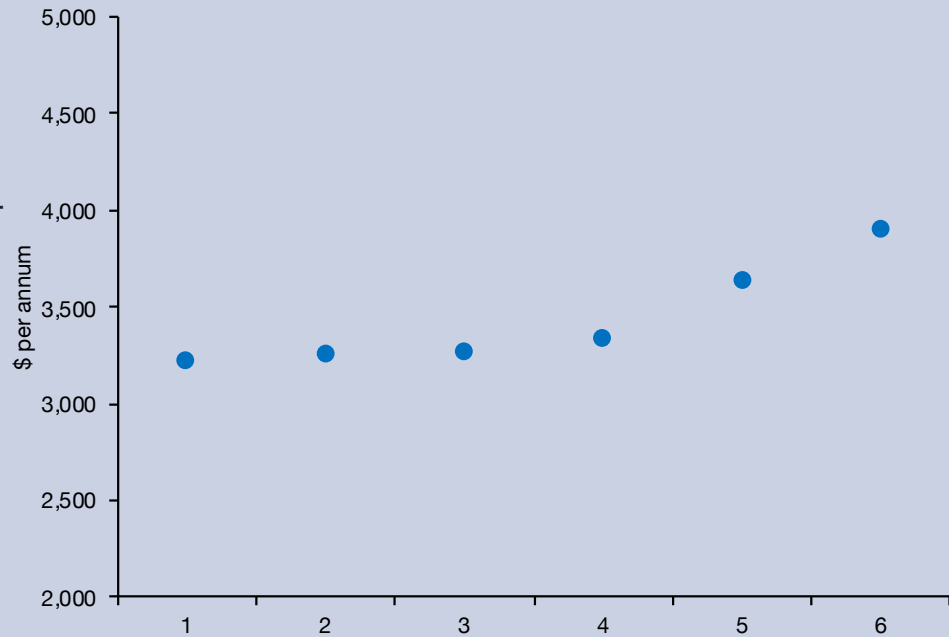


Figure 22 below ranks the retail offers from lowest to highest annual gas bills.<sup>97</sup>

**FIGURE 22 |** Lowest to highest annual bills (incl GST) for market offers in **South Australia (Australian Gas Network)**, October 2019.

*Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum*

	EnergyAustralia	<b>\$3,218</b>
	Red Energy	<b>\$3,260</b>
	Lumo Energy	<b>\$3,268</b>
	AGL	<b>\$3,332</b>
	Origin Energy	<b>\$3,640</b>
	Simply Energy	<b>\$3,902</b>

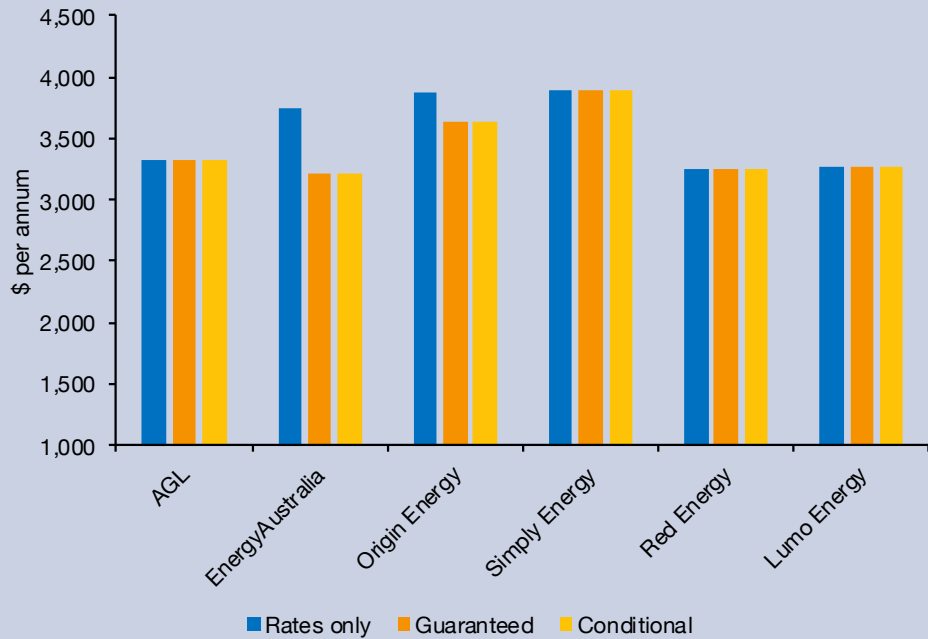
### **Additional discounts**

Only two of the retailers, Energy Australia and Origin Energy, offer additional discounts and they are both guaranteed discounts applied to the bill (14% and 6% respectively).

Chart 98 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts.

<sup>97</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

**CHART 98 | Annual bills based on rates, guaranteed and conditional discounts in South Australia (Australian gas Networks). Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



#### 4.4.3 Changes in energy bills in South Australia

This section compares annual energy bills as of October 2019 to bills as of April 2019.<sup>98</sup> The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2019.

In South Australia, new network tariffs took effect in July 2019 meaning that the electricity retail prices have been affected by an underlying price reset in this six month period. Most of the retailers have thus changed their offers (rates, discounts or both). It should be noted, however, that these changes are not always caused by new base rates. Some offers have been discontinued, new offers have been introduced and others have changed their discounts.

On average, annual bills have reduced by approximately \$115, or -1.5%, for businesses consuming 20,000 kWh (single rate) since April 2019. Six retailers have offers that produce lower bills compared to six months ago while four retailers have offers that produce higher bills.<sup>99</sup> Chart 99 below shows changes to retailers' annual bills from April 2019 to October 2019.

<sup>98</sup> Note that these price changes may differ from the overall averages in the national comparison (section 3 above). This is because the average bill in this section is based on retailers offering retail contracts as of both April 2019 and October 2019 while the national comparison includes retailers all retailers offering retail contracts as of April 2019 and October 2019.

<sup>99</sup> Based on market offers inclusive of guaranteed and conditional pay on time discounts

**CHART 99 | Bill change:** Comparison of April 2019 and October 2019 annual electricity bills including guaranteed discounts and pay on time discounts in the SA Power Networks. Annual bills based on market offers as of April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.

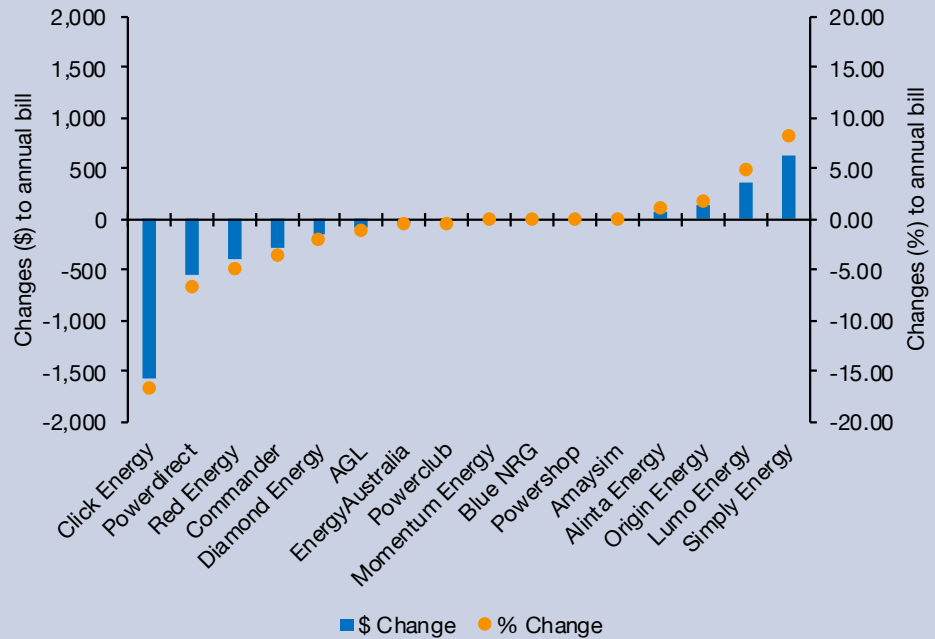
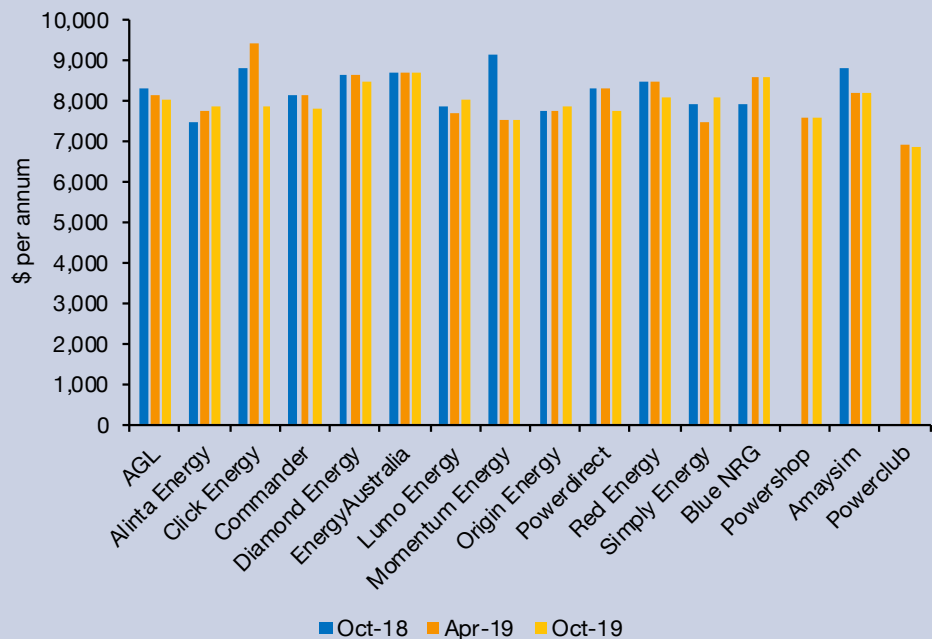


Chart 100 below shows retailers' annual bills as of October 2018, April 2019 and October 2019.<sup>100</sup>

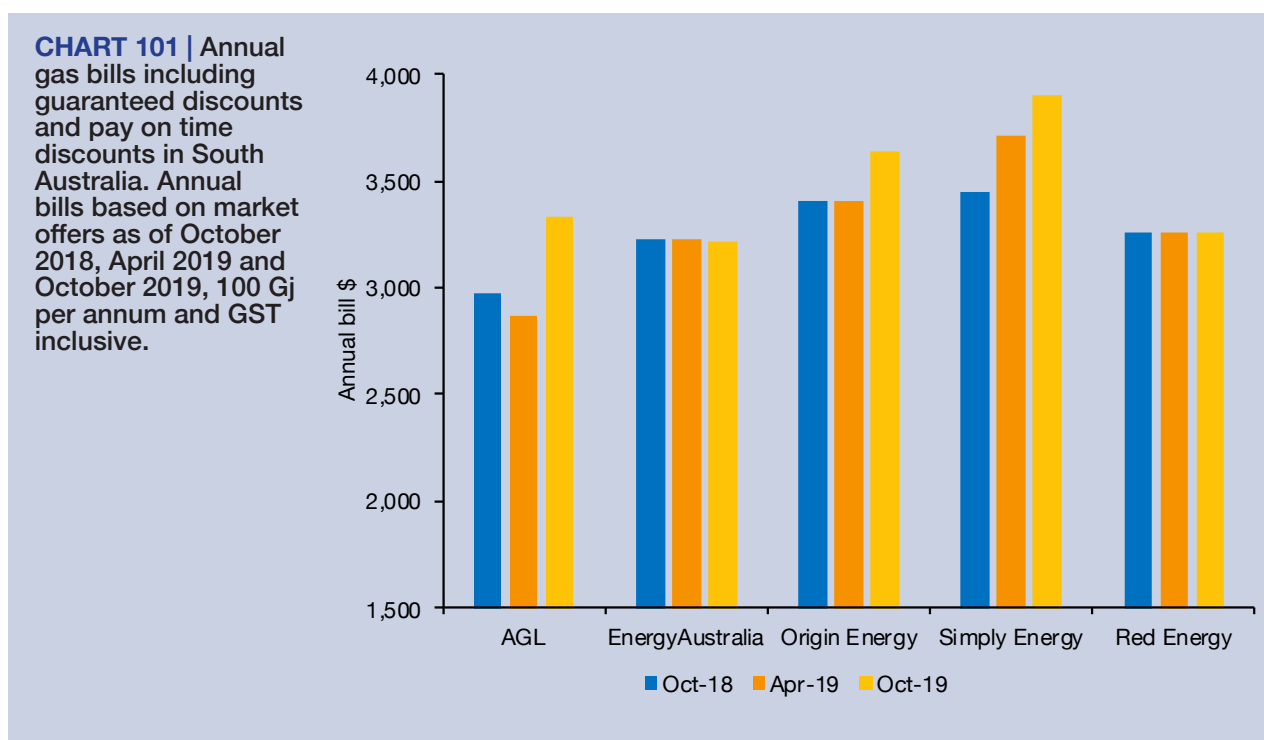
**CHART 100 | Electricity bills:** Comparison of October 2018, April 2019 and October 2019 annual electricity bills including guaranteed discounts and pay on time discounts in the SA Power Networks. Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



In relation to gas, AGL, Origin Energy and Simply Energy's bills increased between April 2019 and October 2019 while Energy Australia and Red Energy's offers remained unchanged during this period.

<sup>100</sup> Note that some retailers such as Powershop and Powerclub did not have published offers in South Australia in April and October 2018. Only retailers with market offers available over two, or more, collection points have been included in this comparison.

Chart 101 below shows annual gas bills in the Envestra/AGN gas zone as of October 2018, April 2019 and October 2019.



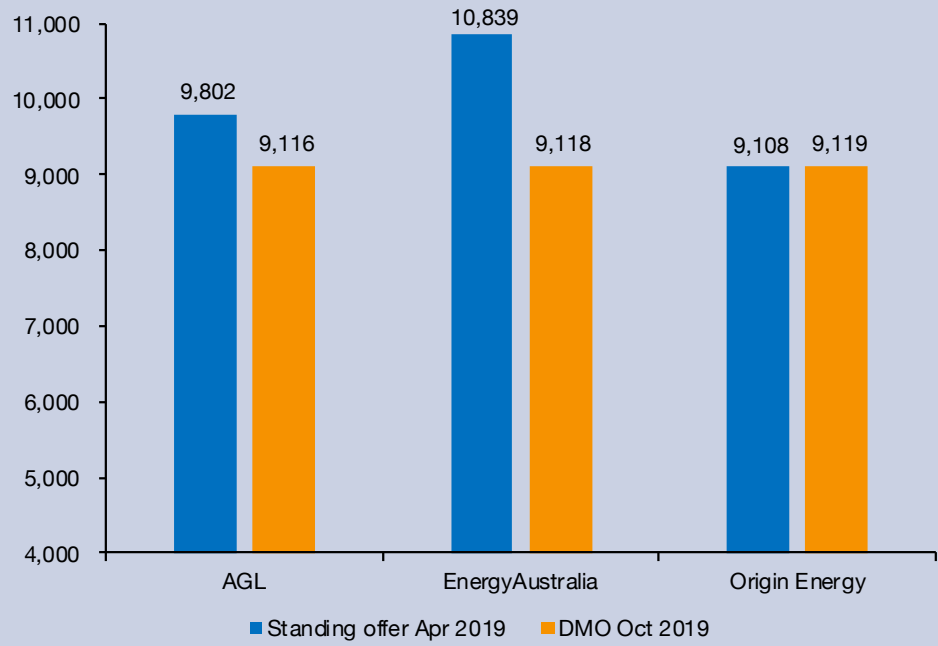
#### 4.4.4 Impact of the DMO

Since the introduction of the DMO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously. Furthermore, as shown in section 4.4.3 above, the average market offer bill has decreased in all three network areas but some retailers have market offers that produce higher bills in October 2019 compared to six months ago (April 2019). Importantly, none of the retail market offers produce annual bills that are greater than the DMO (see section 4.4.1 above).<sup>101</sup>

Businesses previously on a standing offer with AGL or Energy Australia will have experienced significant bill reductions since the introduction of the DMO. Businesses previously on Origin Energy’s standing offer, however, would have received a slight price increase. Chart 102 below compares AGL, Energy Australia and Origin Energy’s standing offers prior to the DMO taking effect to their current DMO offers. It shows that Energy Australia’s bill has reduced the most (by approximately \$1,720). AGL’s bill has also reduced (by \$685) while Origin Energy’s bill his increased slightly (by \$10).

<sup>101</sup> Market offer bills including guaranteed discounts compared to the DMO.

**CHART 102 |** The DMO compared to the 'big 3' retailers' standing offers in the SA Power Networks. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



## 4.5 Tasmania

The Office of the Tasmanian Economic Regulator (OTTER) continues to regulate electricity retail prices for small customers while gas retail prices have been deregulated since reticulated gas first became available in 2007.

Tasmania is comprised of a single electricity network and a single gas pricing zone. Aurora Energy is the incumbent electricity retailer while Aurora Energy and Tas Gas Retail are the gas retailers.



### 4.5.1 Tasmanian electricity bills October 2019

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>102</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in TasNetworks is 25,315 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) in Tasmania is currently around \$5,535.<sup>103</sup> SMEs switching from Aurora Energy's regulated offer to the new entrant, 1st Energy's, market offer may save \$265 per annum.

Figure 23 below ranks the retail offers from lowest to highest annual electricity bills.<sup>104</sup>

**FIGURE 23 |** Lowest to highest annual bills (incl GST) for **Tasmanian offers** in October 2019  
SMEs consuming 20,000 kWh per annum, single rate

	1st Energy	\$5,402
	Aurora Energy	\$5,668

### Network charges

The Tasmanian electricity network, TasNetworks, introduces new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System

<sup>102</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

<sup>103</sup> Based on the Aurora Energy and 1st Energy (which is a recent entrant in the Tasmanian electricity retail market) average. In previous reports we have compared Aurora Energy and ERM Power bills, but as ERM Power have not had any market offers listed on their website since October 2018, the October 2018 analysis was based on Aurora Energy Only.

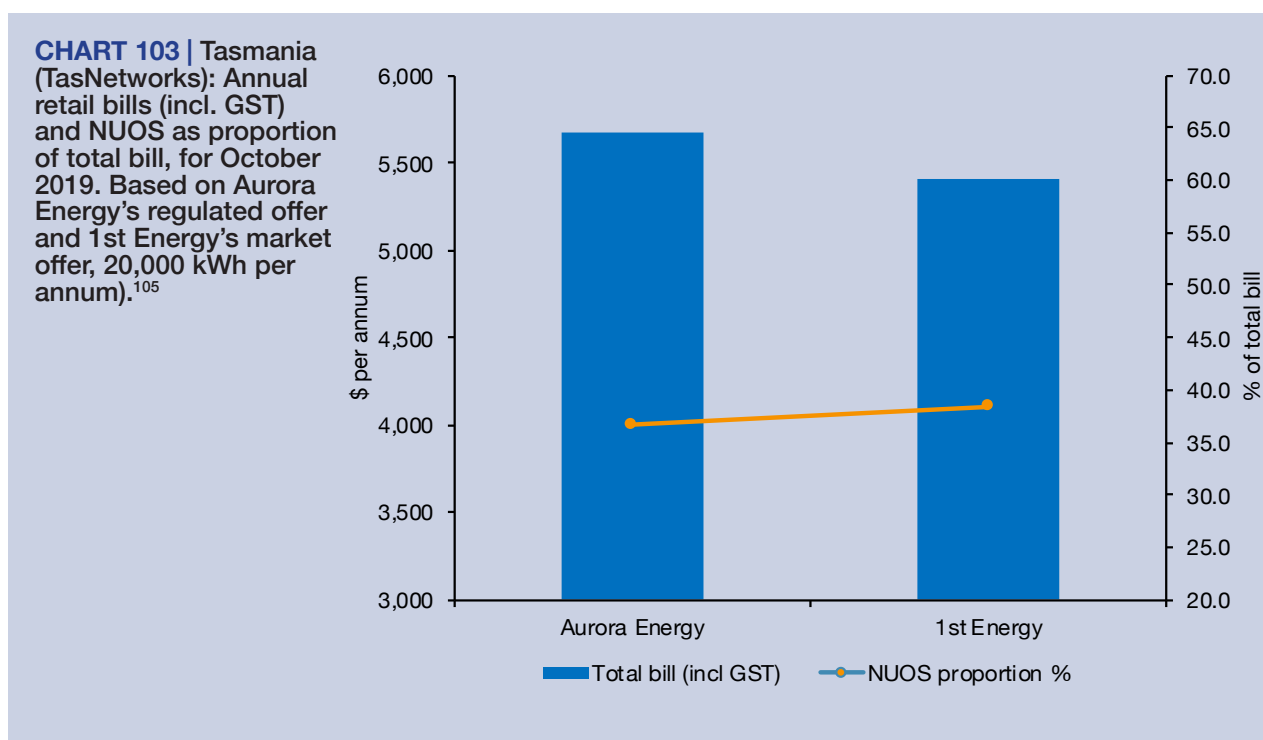
<sup>104</sup> These offers were collected in October 2019 and it should be noted that retailers may change their rates at any time.



(TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs

The chart presented in this section shows that the NUOS proportion of bills is very similar for Aurora Energy and 1st Energy. As 1st Energy’s offer produces a slightly lower retail bill (inclusive of pay on time discounts), the NUOS proportion of bill for 1st Energy 38.4% while the NUOS is 36.6% of the total bill for Aurora Energy customers.

Chart 103 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).



#### 4.5.2 Tasmanian gas bills October 2019

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

There are two retailers, Aurora Energy and Tas Gas Retail, offering market contracts to gas customers in Tasmania and the typical annual bill for a SME customer using 100 GJ per annum is \$4,635. The difference between the two offers is approximately \$130 per annum. Neither Aurora Energy nor Tas Gas Retail offer any additional discounts.

<sup>105</sup> Based on retail offer rates as October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the TasNetworks’s charges (tariff Tas 22) for the 2019/20 financial year. The NUOS also includes fixed charges.

**CHART 104 |** Annual gas market offer bills in Tasmania. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.

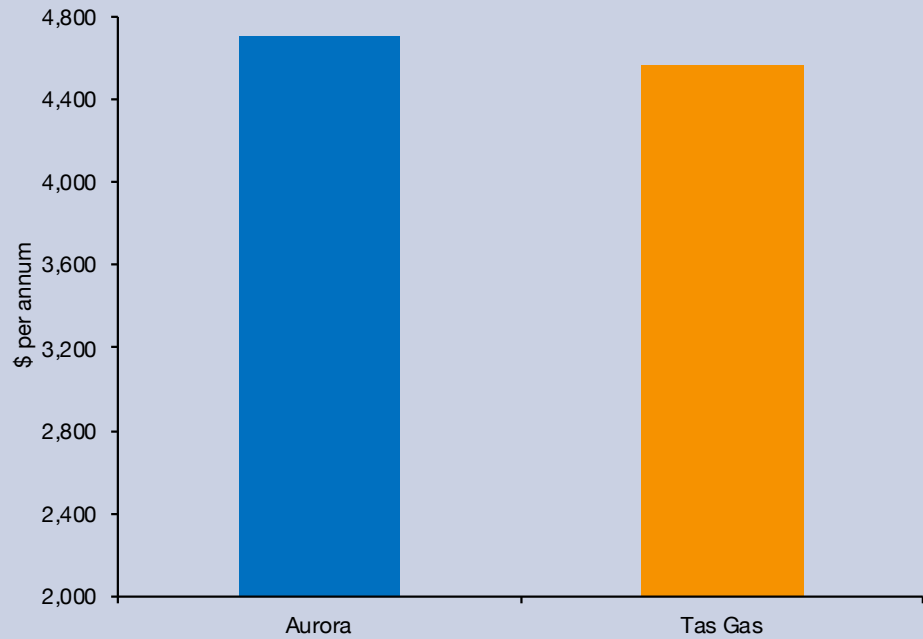




Figure 24 below ranks the retail offers from lowest to highest annual gas bills.<sup>106</sup>

**FIGURE 24 |** Lowest to highest annual bills (incl GST) for **Tasmanian market offers** in October 2019 SMEs consuming 100 GJ per annum

	Tas Gas Retail	<b>\$4,568</b>
	Aurora Energy	<b>\$4,700</b>

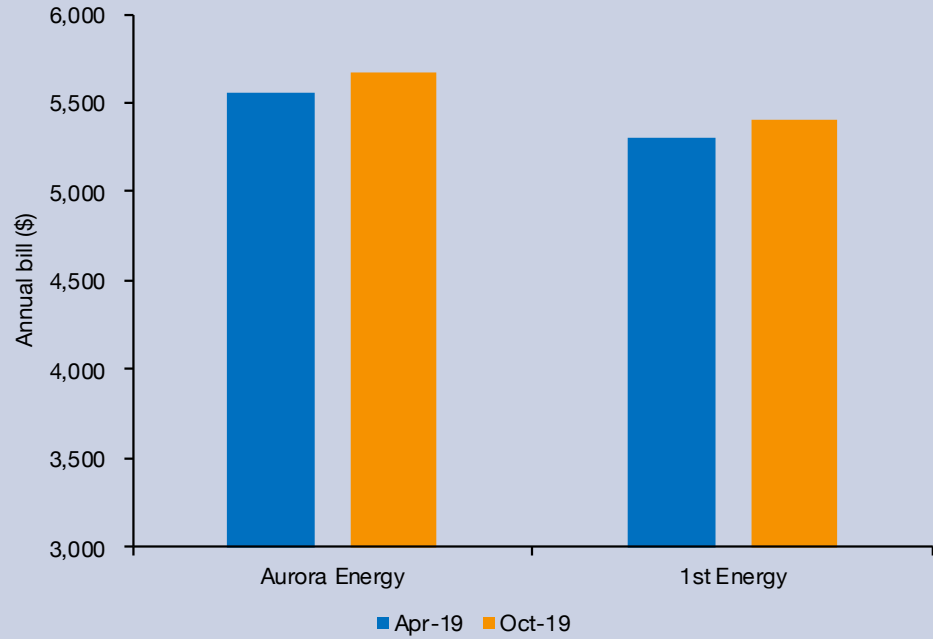
### 4.5.3 Changes in energy bills in Tasmania

This section compares annual energy bills as of October 2019 to bills as of April 2019. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2019. In Tasmania, new network tariffs took effect in July 2019 meaning that the electricity retail prices have been affected by an underlying price reset in this six month period.

Both Aurora Energy and 1st Energy have increased their prices by 2% since April 2019. Aurora Energy’s annual bill for businesses consuming 20,000 kWh per annum increased by \$110 and, similarly, 1st Energy’s bill increased by \$105.

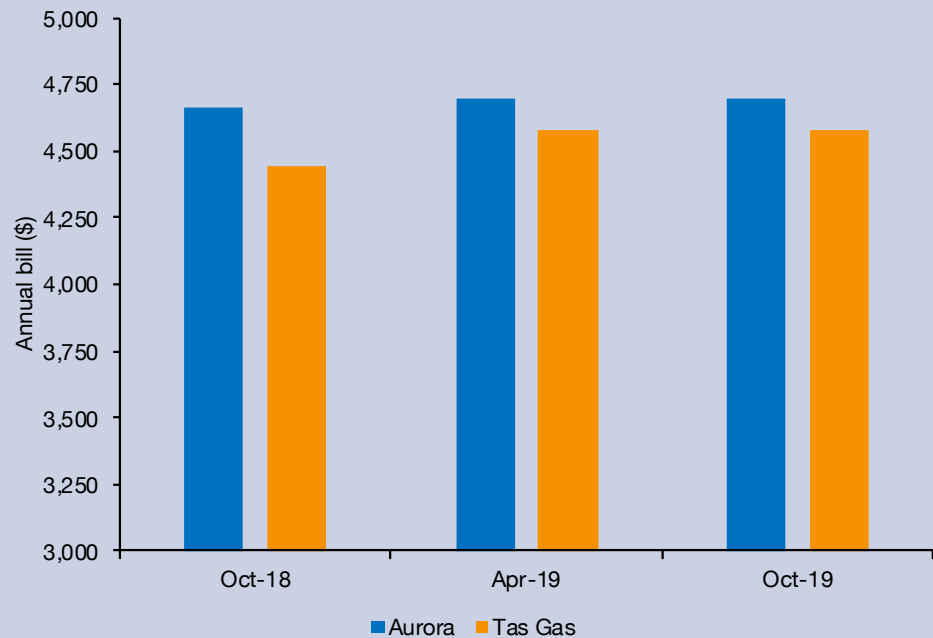
<sup>106</sup> These offers were collected in October 2019 and it should be noted that retailers may change their rates at any time.

**CHART 105 |** Annual electricity retail bills (incl. GST) as of April 2019 and October 2019. Based on Aurora Energy's regulated offer and 1st Energy's market offer, 20,000 kWh per annum).



In relation to gas, Aurora Energy and Tas Gas Retail's rates increased on 1 January 2019 and have remained unchanged since. Chart 106 below shows annual gas bills for Aurora and Tas Gas Retail as of October 2018, April 2019 and October 2019.

**CHART 106 |** Annual gas bills from October 2018 to October 2019 in Tasmania. Annual bills based on 100 GJ per annum and GST inclusive.



## 4.6 Australian Capital Territory (ACT)

Electricity retail prices in the ACT continue to be regulated by the Independent Competition and Regulatory Commission (ICRC) while gas retail prices have been deregulated since 2002. The regulated electricity rates are currently the same as ActewAGL's electricity standing offer.

The ACT is comprised of a single electricity network and a single gas pricing zone.<sup>107</sup> ActewAGL is the incumbent retailer.

### 4.6.1 ACT electricity bills October 2019

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>108</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Evoenergy network is 32,257 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

#### **The price-spread**

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$6,125.<sup>109</sup> Chart 107 shows annual bills for five retailers in the Evoenergy distribution network and that the maximum price spread is \$1,165 per annum. If we exclude the single best and worst offer, however, the price spread is reduced to \$125.

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<sup>107</sup> Evoenergy, formerly known as ActewAGL, is the electricity network and gas distributor while the retail arm continues to operate as ActewAGL.

<sup>108</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/Demand-Forecasts/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

<sup>109</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers

**CHART 107 |** The price spread in the ACT's Evoenergy distribution network. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 20,000 kWh per annum, single rate and GST inclusive

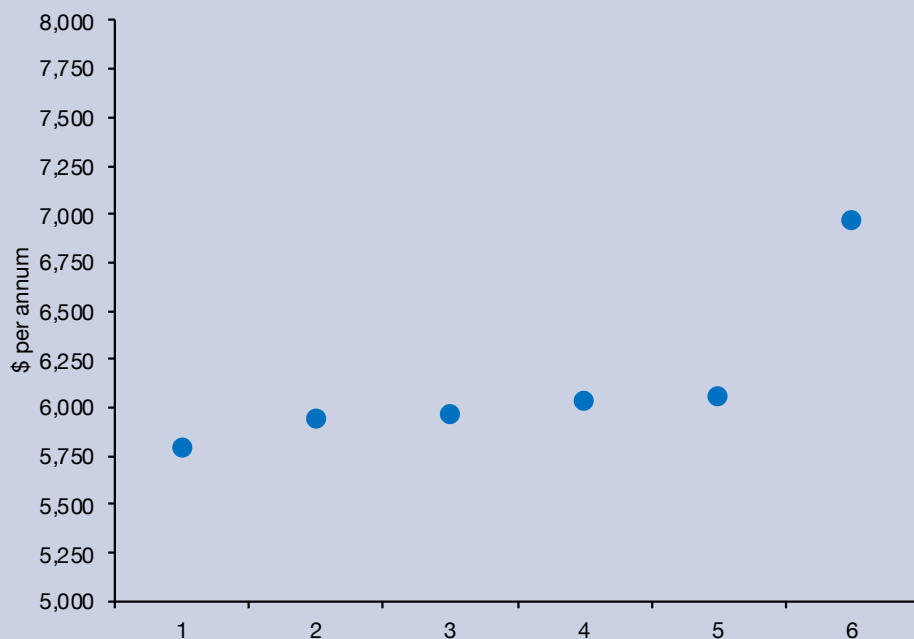


Figure 25 below ranks the retail offers from lowest to highest annual bills.<sup>110</sup>

**FIGURE 25 |** Lowest to highest annual bills (incl GST) for market offers in **ACT's Evoenergy (formerly ActewAGL)** (October 2019). *Is including guaranteed discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)*

	Powerclub	<b>\$5,792</b>
	EnergyAustralia	<b>\$5,934</b>
	ActewAGL	<b>\$5,963</b>
	Red Energy	<b>\$6,033</b>
	Origin Energy	<b>\$6,058</b>
	Next Business Energy	<b>\$6,957</b>

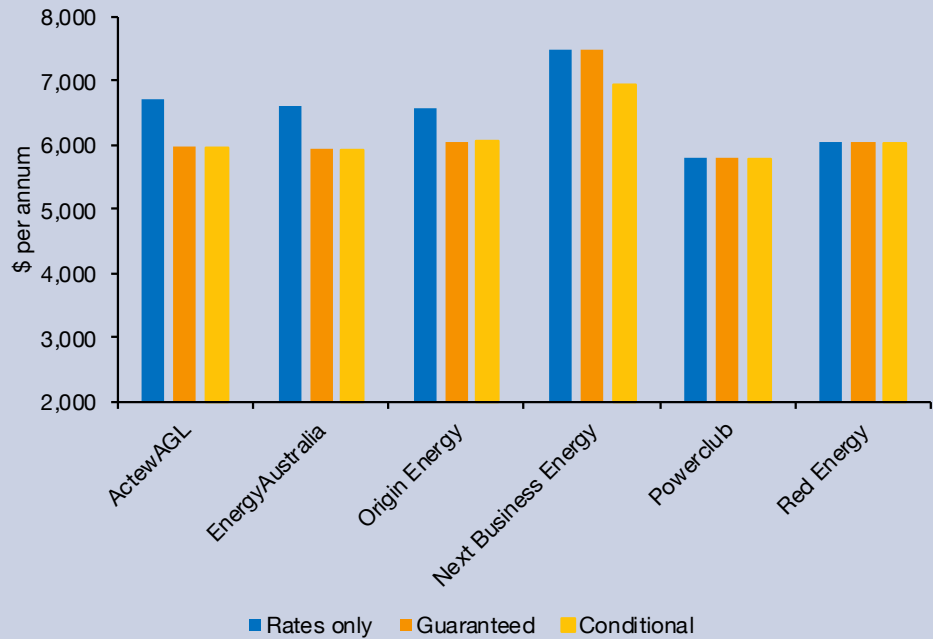
### **Additional discounts**

Three retailers, ActewAGL, Energy Australia and Origin Energy, offer guaranteed discounts and Next Business Energy is the only retailer that offers a pay on time discount. Chart 108 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as pay on time discounts.<sup>111</sup>

<sup>110</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

<sup>111</sup> Origin Energy's discount is applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

**CHART 108 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the ACT (Evoenergy). Annual bills based on market offers as of October 2019, 20,000 kWh per annum, single rate and GST inclusive.**



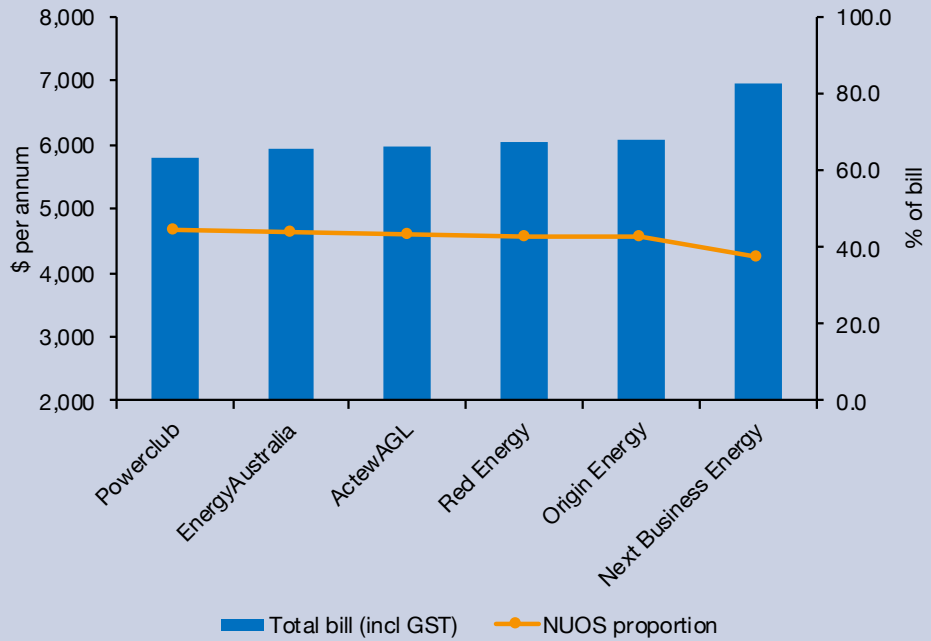
### **Network charges**

The ACT electricity network, Evoenergy, introduces new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as other costs such as jurisdictional charges and metering charges. The retailers can, and generally will, build changes to the NUOS (in relation to both shape and price) into their retail tariffs.

The chart presented in this section shows that the NUOS proportion of bills varies between retail offers. The NUOS proportion of bill for Powerclub is 44.7% while the NUOS only comprises 37.2% of the total bill for Next Business Energy customers.

Chart 109 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

**CHART 109 |**  
 Evoenergy: Annual retail bills (incl. GST) and NUOS as proportion of total bill, October 2019. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum.<sup>112</sup>



#### **4.6.2 ACT gas bills October 2019**

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

#### **The price-spread**

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$3,250 (including discounts). Chart 110 shows annual bills for three retailers in the ACT and that the maximum price spread is approximately \$855 per annum.<sup>113</sup>

<sup>112</sup> Based on market offer rates as of October 2019, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Evoenergy's charges for the 2019/20 financial year. The NUOS also includes fixed charges.

<sup>113</sup> See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers

**CHART 110 |** The price spread in the ACT. Annual bills based on market offers as of October 2019 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.

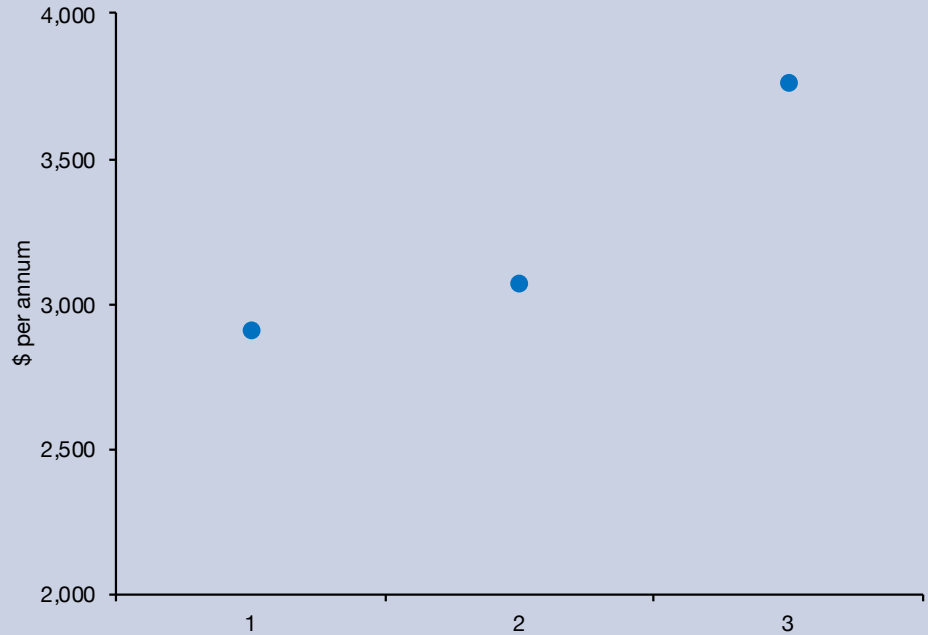




Figure 26 below ranks the retail offers from lowest to highest annual gas bills.<sup>114</sup>

**FIGURE 26 |** Lowest to highest annual bills (incl GST) for **market offers in the ACT** (October 2019). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	EnergyAustralia	<b>\$2,909</b>
	Origin Energy	<b>\$3,070</b>
	ActewAGL	<b>\$3,766</b>

### **Additional discounts**

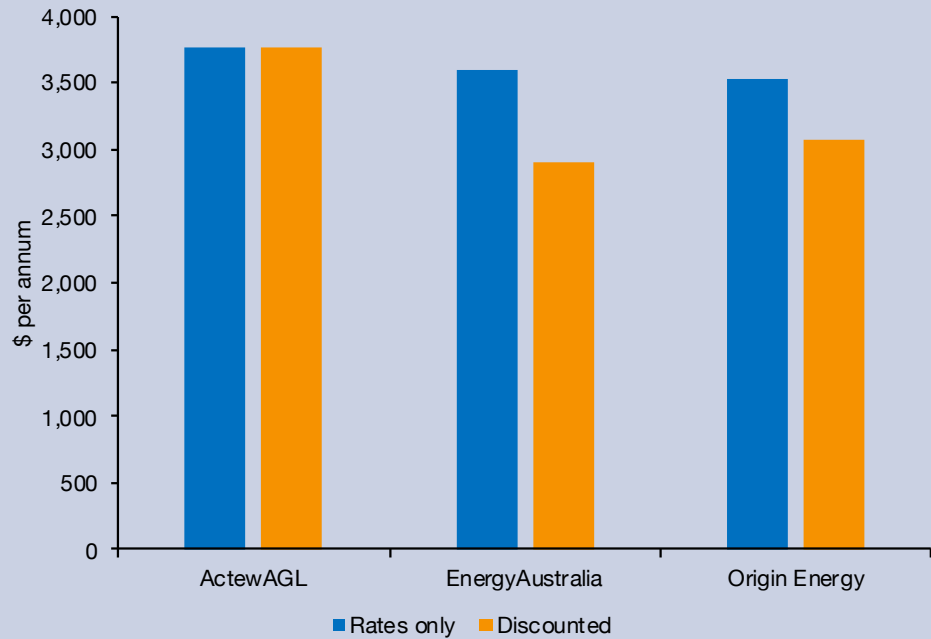
Energy Australia and Origin offer guaranteed discounts off the bills while ActewAGL does not offer any additional discounts.<sup>115</sup> Chart 111 below shows annual bills based on their rates only and inclusive of guaranteed discounts.

<sup>114</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

<sup>115</sup> ActewAGL does have dual fuel offers that include additional discounts off electricity and gas bills.



**CHART 111 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the ACT. Annual bills based on market offers as of October 2019, 100 GJ per annum and GST inclusive.**



#### **4.6.3 Changes in energy bills in the ACT**

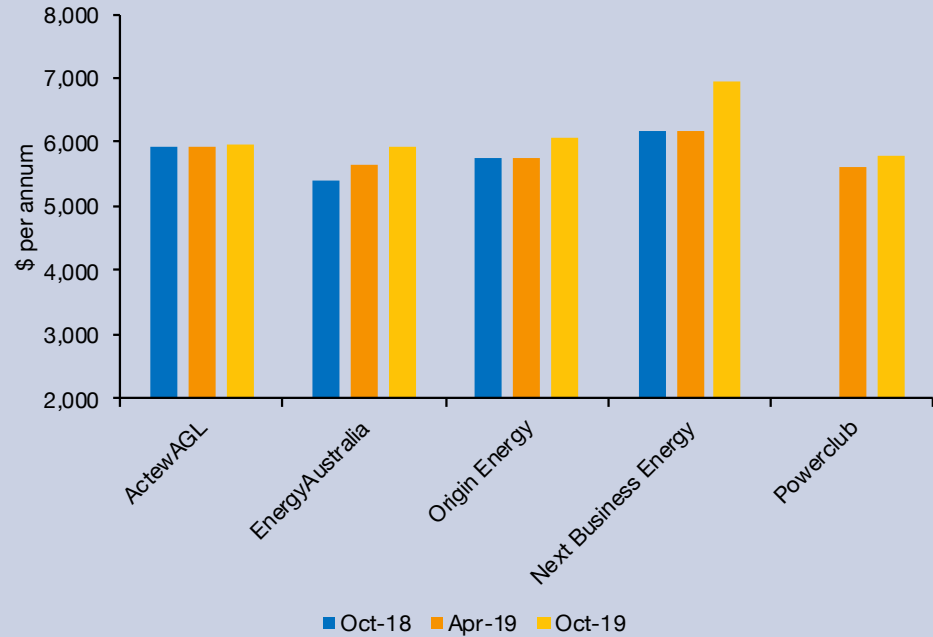
This section compares annual energy bills as of October 2019 to bills as of April 2019. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2019.

In the ACT, new network tariffs took effect in July 2019 meaning that the electricity retail prices have been affected by an underlying price reset in this six month period. All of the retailers have thus changed their offers (rates, discounts or both).

On average, electricity bills increased by \$320, or 5%, from April 2019 to October 2019 for businesses using 20,000 kWh per annum. ActewAGL increased their bills the least (1%) while Next Business Energy had the greatest increases (12.5%). Chart 112 below shows annual electricity bills for retailers operating in the ACT as of October 2018, April 2019 and October 2019.

**CHART 112 |**

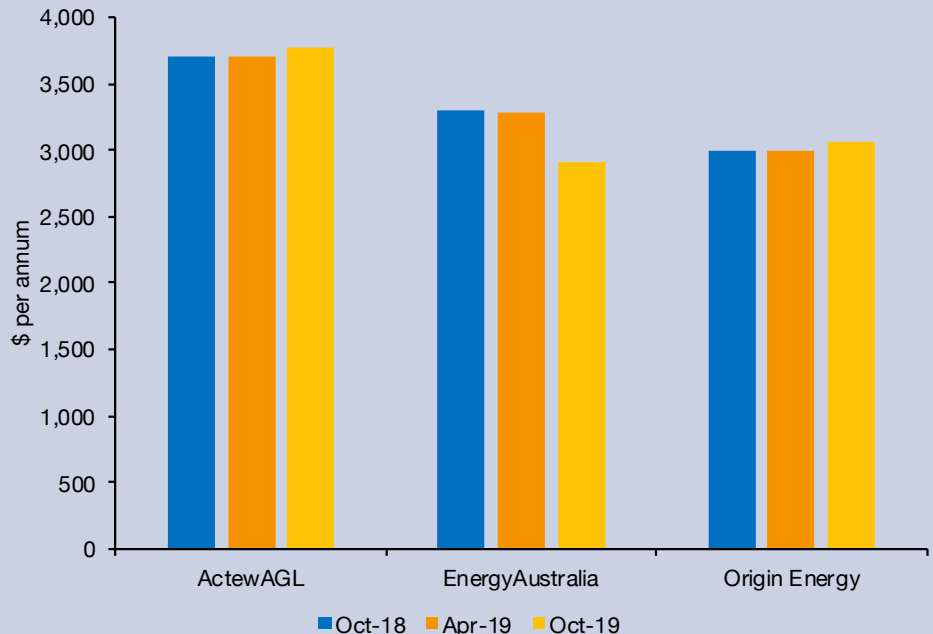
Comparison of October 2018, April 2019 and October 2019 annual electricity bills including guaranteed discounts and pay on time discounts in the ACT (Evoenergy). Annual bills based on market offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



In relation to gas, ActewAGL and Origin Energy increased their prices between April 2019 and October 2019 while Energy Australia's bills have decreased due to the much higher guaranteed discount offered. Chart 113 below shows annual gas bills for customers using 100 GJ per annum as of October 2018, April 2019 and October 2019.

**CHART 113 |**

Comparison of October 2018, April 2019 and October 2019 annual gas bills including guaranteed discounts and pay on time discounts in the ACT (Evoenergy). Annual bills based on market offers as of October 2018, April 2019 and October 2019, 100 GJ per annum and GST inclusive.



## 4.7 Western Australia and Northern Territory

Electricity prices remain regulated in Western Australia and the Northern Territory. In Western Australia the Minister for Energy also determines a maximum price cap for gas prices.<sup>116</sup>

The Northern Territory has a single electricity network (the Power and Water Corporation) and Jacana Energy is the retailer. In Western Australia there are two electricity networks: Horizon Power and Western Power. Western Power supplies the South West Interconnected System (SWIS) while Horizon Power supplies northern areas and remote communities. In the SWIS area, Synergy is the main retailer but the regulated retail price is the same for customers across Western Australia. In relation to gas, Western Australia has three pricing zones. The main pricing zone covers the South West and two smaller pricing zones cover Albany and Kalgoorlie.

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO<sup>117</sup> shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. The AEMO report does not cover WA and NT, but average consumption levels in the most comparable networks of Energex and South Australia Power Networks are 16,678 kWh/annum and 14,262 kWh/annum respectively. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/projects/retail-tariff-tracker>

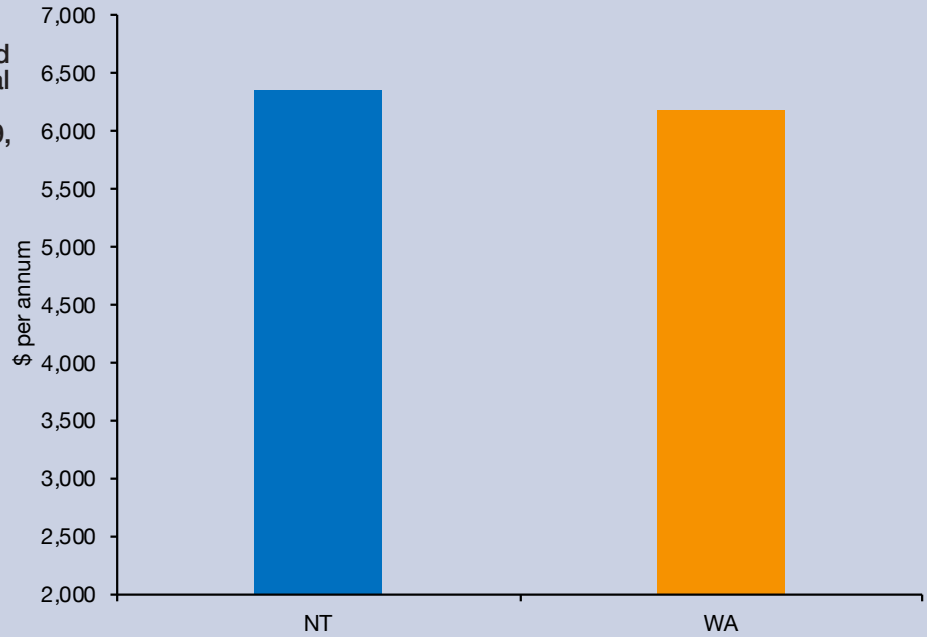
### **4.7.1 Western Australia and Northern Territory electricity bills October 2019**

SMEs using 20,000 kWh per annum (single rate) in the Northern Territory will have an annual bill of \$6,355 while Western Australian businesses will have a somewhat lower bill of around \$6,185. While the fixed daily supply charge is substantially lower in the Northern Territory than in Western Australia, the lower price per kWh in Western Australia result in annual bills being \$170 less in Western Australia for customers with this consumption level.

<sup>116</sup> There are no reticulated gas offers for small business customers in the Northern Territory.

<sup>117</sup> Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017 at [https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning\\_and\\_Forecasting/EFI/Jacobs-Retail-electricity-price-history-and-projections\\_Final-Public-Report-June-2017.pdf](https://www.aemo.com.au/-/media/Files/Electricity/NEM/Planning_and_Forecasting/EFI/Jacobs-Retail-electricity-price-history-and-projections_Final-Public-Report-June-2017.pdf)

**CHART 114 | Annual bills for the single rate tariff in the Northern Territory and Western Australia. Annual bills based on regulated offers as of October 2019, 20,000 kWh per annum and GST inclusive.**



#### **4.7.2 Western Australian gas bills October 2019**

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

AGL and Origin Energy have recently entered the WA gas retail market. Chart 115 below shows annual bills for gas customers in the South West (Perth region). While all three retailers have the same base rates for gas consumption, the daily supply charge and additional discounts vary.<sup>118</sup> Alinta does not offer an additional discount while AGL and Origin offer 45% and 30% off usage charges during the benefit period. A small business on Alinta's offer can save approximately \$1,730 per annum by switching to AGL's offer.

<sup>118</sup> Western Australia uses a unit price for gas and 1 unit equals 3.6 MJ. All bill analysis for WA in this report has converted the unit price to the price per MJ. Kleenheat also offers gas contracts to small businesses in WA but as they do not post their business rates on their website (requesting a quote is necessary), we have not included Kleenheat in this analysis.

**CHART 115 |** Annual bills for gas customers the South West (Perth region). Annual bills based on Market offers as of October 2019, 100 GJ per annum and GST inclusive.<sup>119</sup>

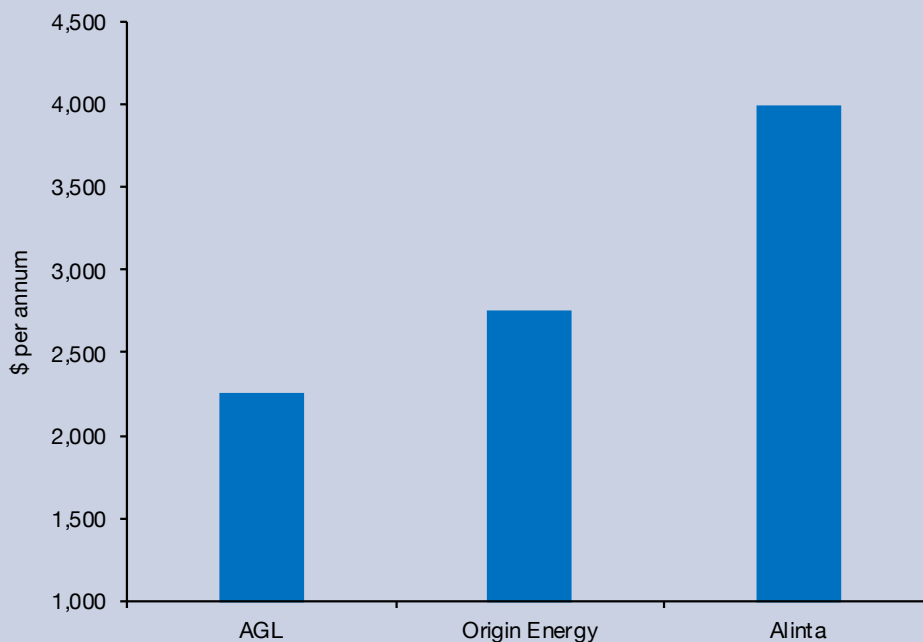


Figure 27 below ranks the retail offers from lowest to highest annual gas bills.<sup>120</sup>

**FIGURE 27 |** Lowest to highest annual bills (incl GST) for **market offers in Western Australia** (October 2019).

*Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum*

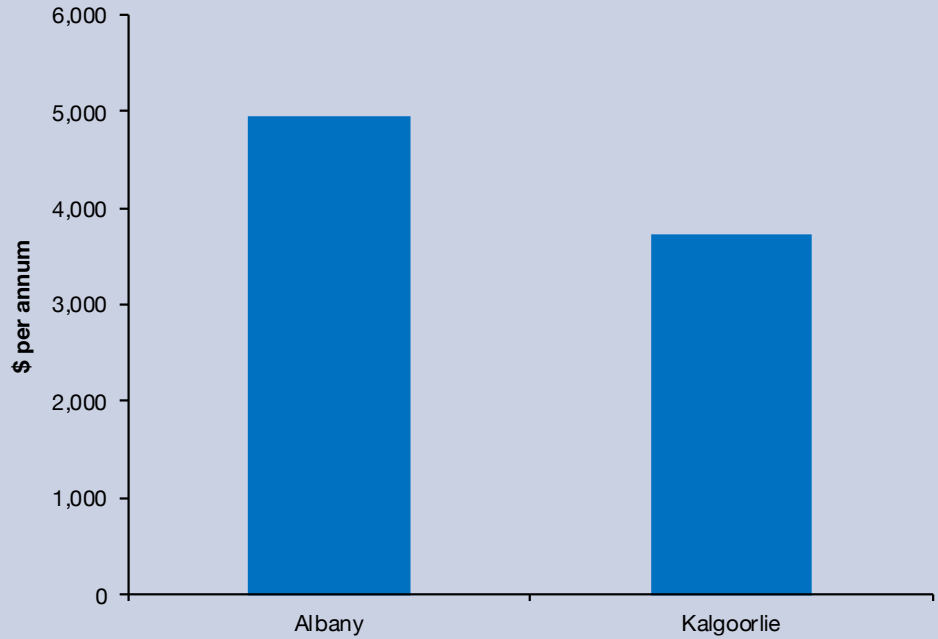
	AGL	<b>\$2,257</b>
	Origin Energy	<b>\$2,757</b>
	Alinta Energy	<b>\$3,987</b>

Alinta also offers gas retail contracts to SMEs in the Albany and Kalgoorlie pricing zones. Chart 116 below shows that the annual bill for a small business using 100 GJ per annum in Albany will pay approximately \$4,955 per annum and customers in Kalgoorlie will pay around \$3,735.

<sup>119</sup> Alinta Energy and AGL's supply charges are inclusive of a daily Account Administration Fee as of October 2018, April 2019 and October 2019. In the previous update (April 2018), only Alinta explicitly stated that an Account Administration Fee applies. Origin's offers in WA do not mention this fee.

<sup>120</sup> These market offers were collected in October 2019 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

**CHART 116 | Annual bills for gas customers in Alinta and Kargoorlie.** Annual bills based on Alinta's standard tariff as of October 2019, 100 GJ per annum and GST inclusive.

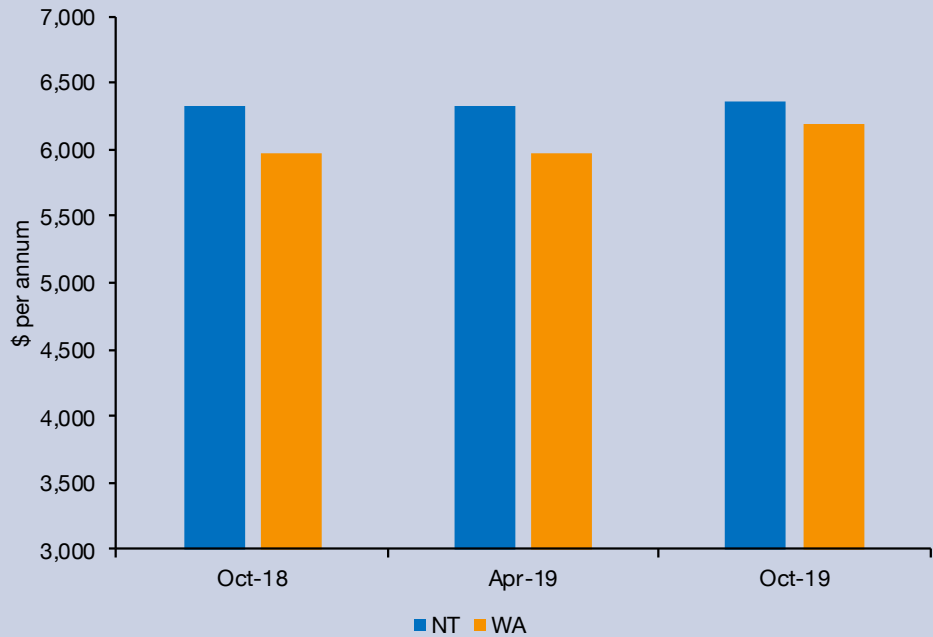


#### **4.7.3 Changes in energy bills in WA and NT**

This section compares annual energy bills as of April 2019 to annual energy bills as of October 2019. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2019.

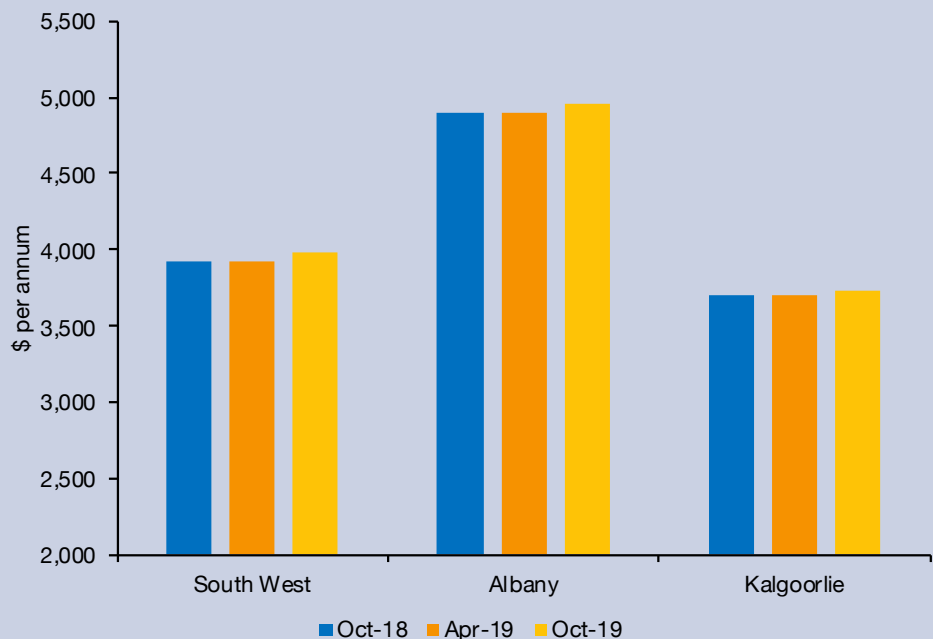
Electricity bills in the Northern Territory and Western Australia increased slightly (\$25 per annum) for a customer using 20,000 kWh per annum in the Northern Territory while they have increased by 4%, or \$220, in Western Australia.

**CHART 117 |** Annual electricity bills in the Northern Territory and Western Australia in October 2018, April 2019 and October 2019. Annual bills based on regulated offers as of October 2018, April 2019 and October 2019, 20,000 kWh per annum, single rate and GST inclusive.



Alinta has increased its gas prices between April 2019 and October 2019 by 1%. Chart 118 below shows \$ increases to annual gas bills for customers on Alinta’s standard contract.<sup>121</sup>

**CHART 118 |** Comparison of October 2018, April 2019 and October 2019 annual gas bills in Western Australia. Annual bills based on Alinta’s offers as of October 2018, April 2019 and October 2019, 100 GJ per annum and GST inclusive



<sup>121</sup> This is based on Alinta’s offers only. Average bills (across all retailers) decreased in South West zone in October 2019 when based on Alinta, AGL and Origin’s offers, due to AGL increasing its discount.

## Appendix A - List of energy offers used in the analysis

Electricity offers for October 2019 bill analysis:

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
ACT	Evoenergy	Single	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	Single	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	Single	Origin Energy	Flexi	8	0	0	0
ACT	Evoenergy	Single	Next Business Energy	Pay on time	0	0	7	0
ACT	Evoenergy	Single	Powerclub	Powerbank Business	0	0	0	0
ACT	Evoenergy	Single	Red Energy	Red Business Saver	0	0	0	0
ACT	Evoenergy	Controlled	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	Controlled	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	Controlled	Origin Energy	Flexi	8	0	0	0
ACT	Evoenergy	Controlled	Next Business Energy	Pay on time	0	0	7	0
ACT	Evoenergy	Controlled	Red Energy	Red Business Saver	0	0	0	0
ACT	Evoenergy	TOU	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	TOU	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	TOU	Origin Energy	Flexi	8	0	0	0
ACT	Evoenergy	TOU	Next Business Energy	Pay on time	0	0	7	0
ACT	Evoenergy	TOU	Powerclub	Powerbank Business	0	0	0	0
NSW	Ausgrid	Single	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	Single	Click Energy	Click Business Start	0	0	0	0
NSW	Ausgrid	Single	Commander	Market offer	0	0	0	0
NSW	Ausgrid	Single	CovaU	Freedom	30	0	0	0
NSW	Ausgrid	Single	Diamond Energy	Renewable Saver POT	0	0	7	0



NSW	Ausgrid	Single	EnergyAustralia	Total Plan	18	0	0	0
NSW	Ausgrid	Single	Next Business Energy	Pay on time	0	0	7	0
NSW	Ausgrid	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	Single	Origin Energy	Flexi	12	0	0	0
NSW	Ausgrid	Single	Powerdirect	Discount Saver	18	0	0	0
NSW	Ausgrid	Single	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Ausgrid	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Ausgrid	Single	Simply Energy	Business Plus	0	0	0	0
NSW	Ausgrid	Single	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	Single	Q Energy	Biz Saver	0	0	0	0
NSW	Ausgrid	Single	1st Energy	1st Saver	0	0	7	0
NSW	Ausgrid	Single	Alinta Energy	Business Advantage	0	0	0	0
NSW	Ausgrid	Single	Blue NRG	Market offer	0	0	0	0
NSW	Ausgrid	Single	Powerclub	Powerbank Business	0	0	0	0
NSW	Ausgrid	Single	Amaysim	Business as you go	0	0	0	0
NSW	Ausgrid	Single	Future X Power	Flexi Saver	0	0	0	13
NSW	Ausgrid	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	Controlled	Click Energy	Click Business Start	0	0	0	0
NSW	Ausgrid	Controlled	Commander	Market offer	0	0	0	0
NSW	Ausgrid	Controlled	CovaU	Freedom	30	0	0	0
NSW	Ausgrid	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Ausgrid	Controlled	EnergyAustralia	Total Plan	18	0	0	0
NSW	Ausgrid	Controlled	Next Business Energy	Pay on time	0	0	7	0
NSW	Ausgrid	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	Controlled	Origin Energy	Flexi	12	0	0	0
NSW	Ausgrid	Controlled	Powerdirect	Discount Saver	18	0	0	0
NSW	Ausgrid	Controlled	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Ausgrid	Controlled	Red Energy	Red Business Saver	0	0	0	0

NSW	Ausgrid	Controlled	Simply Energy	Business Plus	0	0	0	0
NSW	Ausgrid	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	Controlled	Q Energy	Biz Saver	0	0	0	0
NSW	Ausgrid	Controlled	1st Energy	1st Saver	0	0	7	0
NSW	Ausgrid	Controlled	Alinta Energy	Business Advantage	0	0	0	0
NSW	Ausgrid	Controlled	Blue NRG	Market offer	0	0	0	0
NSW	Ausgrid	Controlled	Future X Power	Flexi Saver	0	0	0	13
NSW	Ausgrid	Controlled	Amaysim	Business as you go	0	0	0	0
NSW	Ausgrid	TOU	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	TOU	Click Energy	Click Business Start	0	0	0	0
NSW	Ausgrid	TOU	Commander	Market offer	0	0	0	0
NSW	Ausgrid	TOU	CovaU	Freedom	30	0	0	0
NSW	Ausgrid	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Ausgrid	TOU	EnergyAustralia	Total Plan	18	0	0	0
NSW	Ausgrid	TOU	Next Business Energy	Pay on time	0	0	7	0
NSW	Ausgrid	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	TOU	Origin Energy	Flexi	12	0	0	0
NSW	Ausgrid	TOU	Powerdirect	Discount Saver	18	0	0	0
NSW	Ausgrid	TOU	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Ausgrid	TOU	Red Energy	Red Business Saver	0	0	0	0
NSW	Ausgrid	TOU	Simply Energy	Business Plus	0	0	0	0
NSW	Ausgrid	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	TOU	Q Energy	Biz Saver	0	0	0	0
NSW	Ausgrid	TOU	1st Energy	1st Saver	0	0	7	0
NSW	Ausgrid	TOU	Alinta Energy	Business Advantage	0	0	0	0
NSW	Ausgrid	TOU	Blue NRG	Market offer	0	0	0	0
NSW	Ausgrid	TOU	Amaysim	Business as you go	0	0	0	0
NSW	Endeavour	Single	AGL	Business Essentials	0	0	0	0

NSW	Endeavour	Single	Click Energy	Click Business Start	0	0	0	0
NSW	Endeavour	Single	Commander	Market offer	0	0	0	0
NSW	Endeavour	Single	CovaU	Freedom	30	0	0	0
NSW	Endeavour	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	Single	EnergyAustralia	Total Plan	14	0	0	0
NSW	Endeavour	Single	Next Business Energy	Pay on time	0	0	7	0
NSW	Endeavour	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Endeavour	Single	Origin Energy	Flexi	12	0	0	0
NSW	Endeavour	Single	Powerdirect	Discount Saver	16	0	0	0
NSW	Endeavour	Single	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Endeavour	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	Single	Simply Energy	Business Plus	0	0	0	0
NSW	Endeavour	Single	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	Single	Q Energy	Biz Saver	0	0	0	0
NSW	Endeavour	Single	1st Energy	1st Saver	0	0	7	0
NSW	Endeavour	Single	Alinta Energy	Business Advantage	0	0	0	0
NSW	Endeavour	Single	Blue NRG	Market offer	0	0	0	0
NSW	Endeavour	Single	Powerclub	Powerbank Business	0	0	0	0
NSW	Endeavour	Single	Amaysim	Business as you go	0	0	0	0
NSW	Endeavour	Single	Future X Power	Flexi Saver	0	0	0	13
NSW	Endeavour	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Endeavour	Controlled	Click Energy	Click Business Start	0	0	0	0
NSW	Endeavour	Controlled	Commander	Market offer	0	0	0	0
NSW	Endeavour	Controlled	CovaU	Freedom	30	0	0	0
NSW	Endeavour	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	Controlled	EnergyAustralia	Total Plan	14	0	0	0
NSW	Endeavour	Controlled	Next Business Energy	Pay on time	0	0	7	0
NSW	Endeavour	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0

NSW	Endeavour	Controlled	Origin Energy	Flexi	12	0	0	0
NSW	Endeavour	Controlled	Powerdirect	Discount Saver	16	0	0	0
NSW	Endeavour	Controlled	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Endeavour	Controlled	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	Controlled	Simply Energy	Business Plus	0	0	0	0
NSW	Endeavour	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	Controlled	Q Energy	Biz Saver	0	0	0	0
NSW	Endeavour	Controlled	1st Energy	1st Saver	0	0	7	0
NSW	Endeavour	Controlled	Alinta Energy	Business Advantage	0	0	0	0
NSW	Endeavour	Controlled	Blue NRG	Market offer	0	0	0	0
NSW	Endeavour	Controlled	Amaysim	Business as you go	0	0	0	0
NSW	Endeavour	Controlled	Future X Power	Flexi Saver	0	0	0	13
NSW	Endeavour	TOU	AGL	Business Essentials	0	0	0	0
NSW	Endeavour	TOU	Click Energy	Click Business Start	0	0	0	0
NSW	Endeavour	TOU	Commander	Market offer	0	0	0	0
NSW	Endeavour	TOU	CovaU	Freedom	30	0	0	0
NSW	Endeavour	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	TOU	EnergyAustralia	Total Plan	14	0	0	0
NSW	Endeavour	TOU	Next Business Energy	Pay on time	0	0	7	0
NSW	Endeavour	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Endeavour	TOU	Origin Energy	Flexi	12	0	0	0
NSW	Endeavour	TOU	Powerdirect	Discount Saver	16	0	0	0
NSW	Endeavour	TOU	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Endeavour	TOU	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	TOU	Simply Energy	Business Plus	0	0	0	0
NSW	Endeavour	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	TOU	Q Energy	Biz Saver	0	0	0	0
NSW	Endeavour	TOU	1st Energy	1st Saver	0	0	7	0

NSW	Endeavour	TOU	Alinta Energy	Business Advantage	0	0	0	0
NSW	Endeavour	TOU	Blue NRG	Market offer	0	0	0	0
NSW	Endeavour	TOU	Powerclub	Powerbank Business	0	0	0	0
NSW	Endeavour	TOU	Amaysim	Business as you go	0	0	0	0
NSW	Essential Energy	Single	AGL	Business Essentials	0	0	0	0
NSW	Essential Energy	Single	Click Energy	Click Business Start	0	0	0	0
NSW	Essential Energy	Single	Commander	Market offer	0	0	0	0
NSW	Essential Energy	Single	CovaU	Freedom	30	0	0	0
NSW	Essential Energy	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	Single	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	Single	Next Business Energy	Pay on time	0	0	7	0
NSW	Essential Energy	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Essential Energy	Single	Origin Energy	Flexi	12	0	0	0
NSW	Essential Energy	Single	Powerdirect	Discount Saver	16	0	0	0
NSW	Essential Energy	Single	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Essential Energy	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Essential Energy	Single	Simply Energy	Business Plus	0	0	0	0
NSW	Essential Energy	Single	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	Single	1st Energy	1st Saver	0	0	7	0
NSW	Essential Energy	Single	Alinta Energy	Business Advantage	0	0	0	0
NSW	Essential Energy	Single	Blue NRG	Market offer	0	0	0	0
NSW	Essential Energy	Single	Powerclub	Powerbank Business	0	0	0	0
NSW	Essential Energy	Single	Amaysim	Business as you go	0	0	0	0
NSW	Essential Energy	Single	Future X Power	Flexi Saver	0	0	0	9
NSW	Essential Energy	Single	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Essential Energy	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Essential Energy	Controlled	Click Energy	Click Business Start	0	0	0	0
NSW	Essential Energy	Controlled	Commander	Market offer	0	0	0	0

NSW	Essential Energy	Controlled	CovaU	Freedom	30	0	0	0
NSW	Essential Energy	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	Controlled	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	Controlled	Next Business Energy	Pay on time	0	0	7	0
NSW	Essential Energy	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Essential Energy	Controlled	Origin Energy	Flexi	12	0	0	0
NSW	Essential Energy	Controlled	Powerdirect	Discount Saver	16	0	0	0
NSW	Essential Energy	Controlled	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Essential Energy	Controlled	Red Energy	Red Business Saver	0	0	0	0
NSW	Essential Energy	Controlled	Simply Energy	Business Plus	0	0	0	0
NSW	Essential Energy	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	Controlled	Future X Power	Flexi Saver	0	9	0	0
NSW	Essential Energy	Controlled	1st Energy	1st Saver	0	0	7	0
NSW	Essential Energy	Controlled	Alinta Energy	Business Advantage	0	0	0	0
NSW	Essential Energy	Controlled	Blue NRG	Market offer	0	0	0	0
NSW	Essential Energy	Controlled	Amaysim	Business as you go	0	0	0	0
NSW	Essential Energy	Controlled	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Essential Energy	TOU	AGL	Business Essentials	0	0	0	0
NSW	Essential Energy	TOU	Click Energy	Click Business Start	0	0	0	0
NSW	Essential Energy	TOU	Commander	Market offer	0	0	0	0
NSW	Essential Energy	TOU	CovaU	Freedom	0	30	0	0
NSW	Essential Energy	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	TOU	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	TOU	Next Business Energy	Pay on time	0	0	7	0
NSW	Essential Energy	TOU	Origin Energy	Flexi	12	0	0	0
NSW	Essential Energy	TOU	Powerdirect	Discount Saver	16	0	0	0
NSW	Essential Energy	TOU	Powershop	Shopper with Mega Pack	0	0	15	0
NSW	Essential Energy	TOU	Red Energy	Red Business Saver	0	0	0	0

NSW	Essential Energy	TOU	Simply Energy	Business Plus	0	0	0	0
NSW	Essential Energy	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	TOU	1st Energy	1st Saver	0	0	7	0
NSW	Essential Energy	TOU	Alinta Energy	Business Advantage	0	0	0	0
NSW	Essential Energy	TOU	Blue NRG	Market offer	0	0	0	0
NSW	Essential Energy	TOU	Powerclub	Powerbank Business	0	0	0	0
NSW	Essential Energy	TOU	Amaysim	Business as you go	0	0	0	0
NSW	Essential Energy	TOU	Enova Energy	Business Economy Plus	0	0	0	3
NT	PWC	Single	Jacana Energy	Regulated	0	0	0	0
NT	PWC	Two Rate	Jacana Energy	Regulated	0	0	0	0
QLD	Energex	Single	AGL	Business Essentials	0	0	0	0
QLD	Energex	Single	Click Energy	Click Business Start	0	0	0	0
QLD	Energex	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Single	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Single	Origin Energy	Flexi	12	0	0	0
QLD	Energex	Single	Powerdirect	Discount Saver	16	0	0	0
QLD	Energex	Single	Powershop	Shopper with Mega Pack	0	0	15	0
QLD	Energex	Single	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Single	Simply Energy	Business Plus	0	0	0	0
QLD	Energex	Single	Alinta Energy	Business Advantage	0	0	0	0
QLD	Energex	Single	Q Energy	Biz Saver	0	0	0	0
QLD	Energex	Single	1st Energy	1st Saver	0	0	5	0
QLD	Energex	Single	Powerclub	Powerbank Business	0	0	0	0
QLD	Energex	Single	Next Business Energy	Pay on time	0	0	7	0
QLD	Energex	Single	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Single	Amaysim	Business as you go	0	0	0	0
QLD	Energex	Single	Blue NRG	Blue Saver	0	0	0	0
QLD	Energex	Single	Future X Power	Flexi Saver	0	0	0	7

QLD	Energex	Controlled	AGL	Business Essentials	0	0	0	0
QLD	Energex	Controlled	Click Energy	Click Business Start	0	0	0	0
QLD	Energex	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Controlled	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Controlled	Origin Energy	Flexi	12	0	0	0
QLD	Energex	Controlled	Powerdirect	Discount Saver	16	0	0	0
QLD	Energex	Controlled	Powershop	Shopper with Mega Pack	0	0	15	0
QLD	Energex	Controlled	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Controlled	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Controlled	Simply Energy	Business Plus	0	0	0	0
QLD	Energex	Controlled	Alinta Energy	Business Advantage	0	0	0	0
QLD	Energex	Controlled	Q Energy	Biz Saver	0	0	0	0
QLD	Energex	Controlled	1st Energy	1st Saver	0	0	5	0
QLD	Energex	Controlled	Next Business Energy	Pay on time	0	0	7	0
QLD	Energex	Controlled	Blue NRG	Blue Saver	0	0	0	0
QLD	Energex	Controlled	Amaysim	Business as you go	0	0	0	0
QLD	Energex	Controlled	Future X Power	Flexi Saver	0	0	0	7
QLD	Energex	Two Rate	AGL	Business Essentials	0	0	0	0
QLD	Energex	Two Rate	Click Energy	Click Business Start	0	0	0	0
QLD	Energex	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Two Rate	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Two Rate	Origin Energy	Flexi	12	0	0	0
QLD	Energex	Two rate	Powerdirect	Discount Saver	16	0	0	0
QLD	Energex	Two rate	Powershop	Shopper with Mega Pack	0	0	15	0
QLD	Energex	Two Rate	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Two Rate	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Two Rate	Simply Energy	Business Plus	0	0	0	0
QLD	Energex	Two Rate	Alinta Energy	Business Advantage	0	0	0	0



QLD	Energex	Two Rate	Q Energy	Biz Saver	0	0	0	0
QLD	Energex	Two Rate	1st Energy	1st Saver	0	0	5	0
QLD	Energex	Two Rate	Next Business Energy	Pay on time	0	0	7	0
QLD	Energex	Two Rate	Amaysim	Business as you go	0	0	0	0
QLD	Energex	Two Rate	Blue NRG	Blue Saver	0	0	0	0
QLD	Energex	Two Rate	Powerclub	Powerbank Business	0	0	0	0
QLD	Ergon	Single	Ergon Energy	Regulated	0	0	0	0
QLD	Ergon	Controlled	Ergon Energy	Regulated	0	0	0	0
QLD	Ergon	TOU	Ergon Energy	Regulated	0	0	0	0
SA	SA Power Networks	Single	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Single	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Single	Click Energy	Click Business Start	0	0	0	0
SA	SA Power Networks	Single	Commander	Market offer	0	0	0	0
SA	SA Power Networks	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Single	EnergyAustralia	Total Plan	5	0	0	0
SA	SA Power Networks	Single	Lumo Energy	Basic	0	0	0	0
SA	SA Power Networks	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Single	Origin Energy	Flexi	14	0	0	0
SA	SA Power Networks	Single	Powerdirect	Discount Saver	15	0	0	0
SA	SA Power Networks	Single	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Single	Simply Energy	Business Plus	0	0	0	0
SA	SA Power Networks	Single	Blue NRG	Market offer	0	0	0	0
SA	SA Power Networks	Single	Powershop	Shopper with Mega Pack	0	0	12	0
SA	SA Power Networks	Single	Amaysim	Business as you go	0	0	0	0
SA	SA Power Networks	Single	Powerclub	Powerbank Business	0	0	0	0
SA	SA Power Networks	Controlled	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Controlled	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Controlled	Click Energy	Click Business Start	0	0	0	0

SA	SA Power Networks	Controlled	Commander	Market offer	0	0	0	0
SA	SA Power Networks	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Controlled	Origin Energy	Flexi	14	0	0	0
SA	SA Power Networks	Controlled	Powerdirect	Discount Saver	15	0	0	0
SA	SA Power Networks	Controlled	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Controlled	Simply Energy	Business Plus	0	0	0	0
SA	SA Power Networks	Controlled	Blue NRG	Market offer	0	0	0	0
SA	SA Power Networks	Controlled	Powershop	Shopper with Mega Pack	0	0	12	0
SA	SA Power Networks	Controlled	Amaysim	Business as you go	0	0	0	0
SA	SA Power Networks	Controlled	Lumo Energy	Basic	0	0	0	0
SA	SA Power Networks	Two Rate	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Two rate	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Two Rate	Click Energy	Click Business Start	0	0	0	0
SA	SA Power Networks	Two Rate	Commander	Market offer	0	0	0	0
SA	SA Power Networks	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
SA	SA Power Networks	Two Rate	Lumo Energy	Basic	0	0	0	0
SA	SA Power Networks	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Two Rate	Origin Energy	Flexi	14	0	0	0
SA	SA Power Networks	Two Rate	Powerdirect	Discount Saver	15	0	0	0
SA	SA Power Networks	Two Rate	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Two Rate	Simply Energy	Business Plus	0	0	0	0
SA	SA Power Networks	Two Rate	Powershop	Shopper with Mega Pack	0	0	12	0
SA	SA Power Networks	Two Rate	Amaysim	Business as you go	0	0	0	0
SA	SA Power Networks	Two Rate	Blue NRG	Market offer	0	0	0	0
SA	SA Power Networks	Two Rate	Powerclub	Powerbank Business	0	0	0	0
TAS	TasNetworks	Single	Aurora Energy	Regulated	0	0	0	0

TAS	TasNetworks	Single	1st Energy	1st Saver	0	0	0	5
TAS	TasNetworks	Controlled	Aurora Energy	Regulated	0	0	0	0
TAS	TasNetworks	Controlled	1st Energy	1st Saver	0	0	0	5
TAS	TasNetworks	TOU	Aurora Energy	Regulated	0	0	0	0
TAS	TasNetworks	TOU	1st Energy	1st Saver	0	0	0	5
VIC	CitiPower	Single	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	Single	Alinta Energy	Business Plus	0	0	0	0
VIC	CitiPower	Single	Click Energy	Click Business Start	0	0	0	0
VIC	CitiPower	Single	Commander	Market offer	0	0	0	0
VIC	CitiPower	Single	CovaU	Smart Saver	0	34	0	0
VIC	CitiPower	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	CitiPower	Single	EnergyAustralia	Total Plan	3	0	0	0
VIC	CitiPower	Single	GloBird Energy	Bizsave	0	0	0	7
VIC	CitiPower	Single	Lumo Energy	Value	0	0	3	0
VIC	CitiPower	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	Single	Next Business Energy	Pay on time	0	0	7	0
VIC	CitiPower	Single	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Single	1st Energy	1st Saver	0	0	0	0
VIC	CitiPower	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Single	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	CitiPower	Single	Red Energy	Red Business Saver	0	0	10	0
VIC	CitiPower	Single	Simply Energy	Business Plus	0	0	0	0
VIC	CitiPower	Single	Sumo Power	Lite Business	0	0	0	0
VIC	CitiPower	Single	Blue NRG	Market offer	0	0	0	0
VIC	CitiPower	Single	Tango Energy	Business Select	0	0	0	0
VIC	CitiPower	Single	Amaysim	Business as you go	0	0	0	0
VIC	CitiPower	Single	Powerclub	Powerbank Business	0	0	0	0
VIC	CitiPower	Controlled	AGL	Business Essentials	0	0	0	0

VIC	CitiPower	Controlled	Alinta Energy	Business Plus	0	0	0	0
VIC	CitiPower	Controlled	Commander	Market offer	0	0	0	0
VIC	CitiPower	Controlled	CovaU	Smart Saver	0	34	0	0
VIC	CitiPower	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	CitiPower	Controlled	EnergyAustralia	Total Plan	3	0	0	0
VIC	CitiPower	Controlled	GloBird Energy	Bizsave	0	0	0	7
VIC	CitiPower	Controlled	Lumo Energy	Value	0	0	3	0
VIC	CitiPower	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	Controlled	Next Business Energy	Pay on time	0	0	7	0
VIC	CitiPower	Controlled	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Controlled	1st Energy	1st Saver	0	0	0	0
VIC	CitiPower	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Controlled	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	CitiPower	Controlled	Red Energy	Red Business Saver	0	0	10	0
VIC	CitiPower	Controlled	Simply Energy	Business Plus	0	0	0	0
VIC	CitiPower	Controlled	Sumo Power	Lite Business	0	0	0	0
VIC	CitiPower	Controlled	Blue NRG	Market offer	0	0	0	0
VIC	CitiPower	Controlled	Tango Energy	Business Select	0	0	0	0
VIC	CitiPower	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	Two Rate	Alinta Energy	Business Plus	0	0	0	0
VIC	CitiPower	Two Rate	Click Energy	Click Business Start	0	0	0	0
VIC	CitiPower	Two Rate	Commander	Market offer	0	0	0	0
VIC	CitiPower	Two Rate	CovaU	Smart Saver	0	34	0	0
VIC	CitiPower	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	CitiPower	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
VIC	CitiPower	Two Rate	GloBird Energy	Bizsave	0	0	0	7
VIC	CitiPower	Two Rate	Lumo Energy	Value	0	0	3	0
VIC	CitiPower	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0

VIC	CitiPower	Two Rate	Next Business Energy	Pay on time	0	0	7	0
VIC	CitiPower	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Two Rate	1st Energy	1st Saver	0	0	0	0
VIC	CitiPower	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Two Rate	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	CitiPower	Two Rate	Red Energy	Red Business Saver	0	0	10	0
VIC	CitiPower	Two Rate	Simply Energy	Business Plus	0	0	0	0
VIC	CitiPower	Two Rate	Sumo Power	Lite Business	0	0	0	0
VIC	CitiPower	Two Rate	Blue NRG	Market offer	0	0	0	0
VIC	CitiPower	Two Rate	Tango Energy	Business Select	0	0	0	0
VIC	CitiPower	Two Rate	Amaysim	Business as you go	0	0	0	0
VIC	CitiPower	TOU	Click Energy	Click Business Start	0	0	0	0
VIC	CitiPower	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	TOU	Red Energy	Red Business Saver	0	0	10	0
VIC	CitiPower	TOU	Powerclub	Powerbank Business	0	0	0	0
VIC	Powercor	Single	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Single	Alinta Energy	Business Plus	0	0	0	0
VIC	Powercor	Single	Click Energy	Click Business Start	0	0	0	0
VIC	Powercor	Single	Commander	Market offer	0	0	0	0
VIC	Powercor	Single	CovaU	Smart Saver	0	34	0	0
VIC	Powercor	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	Powercor	Single	EnergyAustralia	Total Plan	3	0	0	0
VIC	Powercor	Single	GloBird Energy	Bizsave	0	0	0	7
VIC	Powercor	Single	Lumo Energy	Value	0	0	3	0
VIC	Powercor	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Single	Next Business Energy	Pay on time	0	0	7	0
VIC	Powercor	Single	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Single	1st Energy	1st Saver	0	0	0	0

VIC	Powercor	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Single	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Powercor	Single	Red Energy	Red Business Saver	0	0	10	0
VIC	Powercor	Single	Simply Energy	Business Plus	0	0	0	0
VIC	Powercor	Single	Sumo Power	Lite Business	0	0	0	0
VIC	Powercor	Single	Blue NRG	Market offer	0	0	0	0
VIC	Powercor	Single	Tango Energy	Business Select	0	0	0	0
VIC	Powercor	Single	Amaysim	Business as you go	0	0	0	0
VIC	Powercor	Single	Powerclub	Powerbank Business	0	0	0	0
VIC	Powercor	Controlled	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Controlled	Alinta Energy	Business Plus	0	0	0	0
VIC	Powercor	Controlled	Click Energy	Click Business Start	0	0	0	0
VIC	Powercor	Controlled	Commander	Market offer	0	0	0	0
VIC	Powercor	Controlled	CovaU	Smart Saver	0	34	0	0
VIC	Powercor	Controlled	EnergyAustralia	Total Plan	3	0	0	0
VIC	Powercor	Controlled	GloBird Energy	Bizsave	0	0	0	7
VIC	Powercor	Controlled	Lumo Energy	Value	0	0	3	0
VIC	Powercor	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Controlled	Next Business Energy	Pay on time	0	0	7	0
VIC	Powercor	Controlled	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Controlled	1st Energy	1st Saver	0	0	0	0
VIC	Powercor	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Controlled	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Powercor	Controlled	Red Energy	Red Business Saver	0	0	10	0
VIC	Powercor	Controlled	Simply Energy	Business Plus	0	0	0	0
VIC	Powercor	Controlled	Sumo Power	Lite Business	0	0	0	0
VIC	Powercor	Controlled	Blue NRG	Market offer	0	0	0	0
VIC	Powercor	Controlled	Tango Energy	Business Select	0	0	0	0

VIC	Powercor	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Two Rate	Alinta Energy	Business Plus	0	0	0	0
VIC	Powercor	Two Rate	Click Energy	Click Business Start	0	0	0	0
VIC	Powercor	Two Rate	Commander	Market offer	0	0	0	0
VIC	Powercor	Two Rate	CovaU	Smart Saver	0	34	0	0
VIC	Powercor	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	Powercor	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
VIC	Powercor	Two Rate	GloBird Energy	Bizsave	0	0	0	7
VIC	Powercor	Two Rate	Lumo Energy	Value	0	0	3	0
VIC	Powercor	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Two Rate	Next Business Energy	Pay on time	0	0	7	0
VIC	Powercor	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Two Rate	1st Energy	1st Saver	0	0	0	0
VIC	Powercor	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Two Rate	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Powercor	Two Rate	Red Energy	Red Business Saver	0	0	10	0
VIC	Powercor	Two Rate	Simply Energy	Business Plus	0	0	0	0
VIC	Powercor	Two Rate	Sumo Power	Lite Business	0	0	0	0
VIC	Powercor	Two Rate	Blue NRG	Market offer	0	0	0	0
VIC	Powercor	Two Rate	Tango Energy	Business Select	0	0	0	0
VIC	Powercor	Two Rate	Amaysim	Business as you go	0	0	0	0
VIC	Powercor	TOU	Click Energy	Click Business Start	0	0	0	0
VIC	Powercor	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	TOU	Red Energy	Red Business Saver	0	0	10	0
VIC	Powercor	TOU	Powerclub	Powerbank Business	0	0	0	0
VIC	AusNet Services	Single	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Single	Alinta Energy	Business Plus	0	0	0	0
VIC	AusNet Services	Single	Click Energy	Click Business Start	0	0	0	0

VIC	AusNet Services	Single	Commander	Market offer	0	0	0	0
VIC	AusNet Services	Single	CovaU	Smart Saver	0	34	0	0
VIC	AusNet Services	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	AusNet Services	Single	EnergyAustralia	Total Plan	3	0	0	0
VIC	AusNet Services	Single	GloBird Energy	Bizsave	0	0	0	7
VIC	AusNet Services	Single	Lumo Energy	Value	0	0	3	0
VIC	AusNet Services	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Single	Next Business Energy	Pay on time	0	0	7	0
VIC	AusNet Services	Single	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Single	1st Energy	1st Saver	0	0	0	0
VIC	AusNet Services	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Single	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	AusNet Services	Single	Red Energy	Red Business Saver	0	0	10	0
VIC	AusNet Services	Single	Simply Energy	Business Plus	0	0	0	0
VIC	AusNet Services	Single	Sumo Power	Lite Business	0	0	0	0
VIC	AusNet Services	Single	Blue NRG	Market offer	0	0	0	0
VIC	AusNet Services	Single	Tango Energy	Business Select	0	0	0	0
VIC	AusNet Services	Single	Amaysim	Business as you go	0	0	0	0
VIC	AusNet Services	Single	Powerclub	Powerbank Business	0	0	0	0
VIC	AusNet Services	Controlled	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Controlled	Alinta Energy	Business Plus	0	0	0	0
VIC	AusNet Services	Controlled	Click Energy	Click Business Start	0	0	0	0
VIC	AusNet Services	Controlled	Commander	Market offer	0	0	0	0
VIC	AusNet Services	Controlled	CovaU	Smart Saver	0	34	0	0
VIC	AusNet Services	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	AusNet Services	Controlled	EnergyAustralia	Total Plan	3	0	0	0
VIC	AusNet Services	Controlled	GloBird Energy	Bizsave	0	0	0	7
VIC	AusNet Services	Controlled	Lumo Energy	Value	0	0	3	0



VIC	AusNet Services	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Controlled	Next Business Energy	Pay on time	0	0	7	0
VIC	AusNet Services	Controlled	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Controlled	1st Energy	1st Saver	0	0	0	0
VIC	AusNet Services	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Controlled	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	AusNet Services	Controlled	Red Energy	Red Business Saver	0	0	10	0
VIC	AusNet Services	Controlled	Simply Energy	Business Plus	0	0	0	0
VIC	AusNet Services	Controlled	Sumo Power	Lite Business	0	0	0	0
VIC	AusNet Services	Controlled	Blue NRG	Market offer	0	0	0	0
VIC	AusNet Services	Controlled	Tango Energy	Business Select	0	0	0	0
VIC	AusNet Services	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Two Rate	Alinta Energy	Business Plus	0	0	0	0
VIC	AusNet Services	Two Rate	Click Energy	Click Business Start	0	0	0	0
VIC	AusNet Services	Two Rate	Commander	Market offer	0	0	0	0
VIC	AusNet Services	Two Rate	CovaU	Smart Saver	0	34	0	0
VIC	AusNet Services	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	AusNet Services	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
VIC	AusNet Services	Two Rate	GloBird Energy	Bizsave	0	0	0	7
VIC	AusNet Services	Two Rate	Lumo Energy	Value	0	0	3	0
VIC	AusNet Services	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Two Rate	Next Business Energy	Pay on time	0	0	7	0
VIC	AusNet Services	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Two Rate	1st Energy	1st Saver	0	0	0	0
VIC	AusNet Services	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Two Rate	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	AusNet Services	Two Rate	Red Energy	Red Business Saver	0	0	10	0
VIC	AusNet Services	Two Rate	Simply Energy	Business Plus	0	0	0	0

VIC	AusNet Services	Two Rate	Sumo Power	Lite Business	0	0	0	0
VIC	AusNet Services	Two Rate	Blue NRG	Market offer	0	0	0	0
VIC	AusNet Services	Two Rate	Tango Energy	Business Select	0	0	0	0
VIC	AusNet Services	Two Rate	Amaysim	Business as you go	0	0	0	0
VIC	AusNet Services	Two Rate	Powerclub	Powerbank Business	0	0	0	0
VIC	Jemena Network	Single	AGL	Business Essentials	0	0	0	0
VIC	Jemena Network	Single	Alinta Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Single	Click Energy	Click Business Start	0	0	0	0
VIC	Jemena Network	Single	Commander	Market offer	0	0	0	0
VIC	Jemena Network	Single	CovaU	Smart Saver	0	34	0	0
VIC	Jemena Network	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	Jemena Network	Single	EnergyAustralia	Total Plan	3	0	0	0
VIC	Jemena Network	Single	GloBird Energy	Bizsave	0	0	0	7
VIC	Jemena Network	Single	Lumo Energy	Value	0	0	3	0
VIC	Jemena Network	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Jemena Network	Single	Next Business Energy	Pay on time	0	0	7	0
VIC	Jemena Network	Single	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Single	1st Energy	1st Saver	0	0	0	0
VIC	Jemena Network	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Single	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Jemena Network	Single	Red Energy	Red Business Saver	0	0	10	0
VIC	Jemena Network	Single	Simply Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Single	Sumo Power	Lite Business	0	0	0	0
VIC	Jemena Network	Single	Blue NRG	Market offer	0	0	0	0
VIC	Jemena Network	Single	Tango Energy	Business Select	0	0	0	0
VIC	Jemena Network	Single	Amaysim	Business as you go	0	0	0	0
VIC	Jemena Network	Single	Powerclub	Powerbank Business	0	0	0	0
VIC	Jemena Network	Controlled	AGL	Business Essentials	0	0	0	0

VIC	Jemena Network	Controlled	Alinta Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Controlled	Click Energy	Click Business Start	0	0	0	0
VIC	Jemena Network	Controlled	Commander	Market offer	0	0	0	0
0	Jemena Network	Controlled	CovaU	Smart Saver	0	34	0	0
VIC	Jemena Network	Controlled	EnergyAustralia	Total Plan	3	0	0	0
VIC	Jemena Network	Controlled	GloBird Energy	Bizsave	0	0	0	7
VIC	Jemena Network	Controlled	Lumo Energy	Value	0	0	3	0
VIC	Jemena Network	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Jemena Network	Controlled	Next Business Energy	Pay on time	0	0	7	0
VIC	Jemena Network	Controlled	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Controlled	1st Energy	1st Saver	0	0	0	0
VIC	Jemena Network	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Controlled	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Jemena Network	Controlled	Red Energy	Red Business Saver	0	0	10	0
VIC	Jemena Network	Controlled	Simply Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Controlled	Sumo Power	Lite Business	0	0	0	0
VIC	Jemena Network	Controlled	Blue NRG	Market offer	0	0	0	0
VIC	Jemena Network	Controlled	Tango Energy	Business Select	0	0	0	0
VIC	Jemena Network	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	Jemena Network	Two Rate	Alinta Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Two Rate	Click Energy	Click Business Start	0	0	0	0
VIC	Jemena Network	Two Rate	Commander	Market offer	0	0	0	0
VIC	Jemena Network	Two Rate	CovaU	Smart Saver	0	34	0	0
VIC	Jemena Network	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	Jemena Network	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
VIC	Jemena Network	Two Rate	GloBird Energy	Bizsave	0	0	0	7
VIC	Jemena Network	Two Rate	Lumo Energy	Value	0	0	3	0
VIC	Jemena Network	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0

VIC	Jemena Network	Two Rate	Next Business Energy	Pay on time	0	0	7	0
VIC	Jemena Network	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Two Rate	1st Energy	1st Saver	0	0	0	0
VIC	Jemena Network	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Two Rate	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	Jemena Network	Two Rate	Red Energy	Red Business Saver	0	0	10	0
VIC	Jemena Network	Two Rate	Simply Energy	Business Plus	0	0	0	0
VIC	Jemena Network	Two Rate	Sumo Power	Lite Business	0	0	0	0
VIC	Jemena Network	Two Rate	Blue NRG	Market offer	0	0	0	0
VIC	Jemena Network	Two Rate	Tango Energy	Business Select	0	0	0	0
VIC	Jemena Network	Two Rate	Amaysim	Business as you go	0	0	0	0
VIC	Jemena Network	Two Rate	Powerclub	Powerbank Business	0	0	0	0
VIC	United Energy	Single	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Single	Alinta Energy	Business Plus	0	0	0	0
VIC	United Energy	Single	Click Energy	Click Business Start	0	0	0	0
VIC	United Energy	Single	Commander	Market offer	0	0	0	0
VIC	United Energy	Single	CovaU	Smart Saver	0	34	0	0
VIC	United Energy	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	United Energy	Single	EnergyAustralia	Total Plan	3	0	0	0
VIC	United Energy	Single	GloBird Energy	Bizsave	0	0	0	7
VIC	United Energy	Single	Lumo Energy	Value	0	0	3	0
VIC	United Energy	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	United Energy	Single	Next Business Energy	Pay on time	0	0	7	0
VIC	United Energy	Single	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Single	1st Energy	1st Saver	0	0	0	0
VIC	United Energy	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Single	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	United Energy	Single	Red Energy	Red Business Saver	0	0	10	0

VIC	United Energy	Single	Simply Energy	Business Plus	0	0	0	0
VIC	United Energy	Single	Sumo Power	Lite Business	0	0	0	0
VIC	United Energy	Single	Blue NRG	Market offer	0	0	0	0
VIC	United Energy	Single	Tango Energy	Business Select	0	0	0	0
VIC	United Energy	Single	Amaysim	Business as you go	0	0	0	0
VIC	United Energy	Single	Powerclub	Powerbank Business	0	0	0	0
VIC	United Energy	Controlled	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Controlled	Alinta Energy	Business Plus	0	0	0	0
VIC	United Energy	Controlled	Click Energy	Click Business Start	0	0	0	0
VIC	United Energy	Controlled	Commander	Market offer	0	0	0	0
VIC	United Energy	Controlled	CovaU	Smart Saver	0	34	0	0
VIC	United Energy	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	United Energy	Controlled	EnergyAustralia	Total Plan	3	0	0	0
VIC	United Energy	Controlled	GloBird Energy	Bizsave	0	0	0	7
VIC	United Energy	Controlled	Lumo Energy	Value	0	0	3	0
VIC	United Energy	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	United Energy	Controlled	Next Business Energy	Pay on time	0	0	7	0
VIC	United Energy	Controlled	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Controlled	1st Energy	1st Saver	0	0	0	0
VIC	United Energy	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Controlled	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	United Energy	Controlled	Red Energy	Red Business Saver	0	0	10	0
VIC	United Energy	Controlled	Simply Energy	Business Plus	0	0	0	0
VIC	United Energy	Controlled	Sumo Power	Lite Business	0	0	0	0
VIC	United Energy	Controlled	Blue NRG	Market offer	0	0	0	0
VIC	United Energy	Controlled	Tango Energy	Business Select	0	0	0	0
VIC	United Energy	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Two Rate	Alinta Energy	Business Plus	0	0	0	0

VIC	United Energy	Two Rate	Click Energy	Click Business Start	0	0	0	0
VIC	United Energy	Two Rate	Commander	Market offer	0	0	0	0
VIC	United Energy	Two Rate	CovaU	Smart Saver	0	34	0	0
VIC	United Energy	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
VIC	United Energy	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
VIC	United Energy	Two Rate	GloBird Energy	Bizsave	0	0	0	7
VIC	United Energy	Two Rate	Lumo Energy	Value	0	0	3	0
VIC	United Energy	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	United Energy	Two Rate	Next Business Energy	Pay on time	0	0	7	0
VIC	United Energy	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Two Rate	1st Energy	1st Saver	0	0	0	0
VIC	United Energy	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Two Rate	Powershop	Shopper with Mega Pack	0	0	23.17	0
VIC	United Energy	Two Rate	Red Energy	Red Business Saver	0	0	10	0
VIC	United Energy	Two Rate	Simply Energy	Business Plus	0	0	0	0
VIC	United Energy	Two Rate	Sumo Power	Lite Business	0	0	0	0
VIC	United Energy	Two Rate	Blue NRG	Market offer	0	0	0	0
VIC	United Energy	Two Rate	Tango Energy	Business Select	0	0	0	0
VIC	United Energy	Two Rate	Amaysim	Business as you go	0	0	0	0
WA	Horizon Power	Single	Horizon Power	Regulated	0	0	0	0
WA	Western Power	Single	Synergy	Regulated	0	0	0	0
WA	Western Power	Two Rate	Synergy	Regulated	0	0	0	0

Gas offers for October 2019 bill analysis:

State	Pricing zone	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
ACT	EvoEnergy	ActewAGL	Business Plan	0	0	0	0
ACT	EvoEnergy	EnergyAustralia	Everyday Saver	0	10	0	0
ACT	EvoEnergy	Origin Energy	Business Saver	0	15	0	0
NSW	Jemena Sydney	AGL	Essentials Saver	0	0	0	0
NSW	Jemena Sydney	Covau	Business Freedom	25	0	0	0
NSW	Jemena Sydney	EnergyAustralia	Total Plan	19	0	0	0
NSW	Jemena Sydney	Origin Energy	Business Flexi	12	0	0	0
NSW	Jemena Sydney	Red Energy	Business Saver	0	0	0	0
NSW	Jemena Sydney	Click Energy	Business Start Gas	0	0	0	0
NSW	Jemena Sydney	Simply Energy	Business Plus	0	0	0	0
NSW	ActewAGL Queanbeyan	ActewAGL	Standard plan	0	0	0	0
NSW	ActewAGL Queanbeyan	EnergyAustralia	Total Plan	19	0	0	0
NSW	ActewAGL Shoalhaven	ActewAGL	Standard plan	0	0	0	0
NSW	Capital Region	ActewAGL	Business plan	8	0	0	0
NSW	Capital Region	EnergyAustralia	Total Plan	19	0	0	0
NSW	Tamworth	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Albury	EnergyAustralia	Total Plan	19	0	0	0
NSW	AGN Albury	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Albury	AGL	Essentials Saver	0	0	0	0
NSW	AGN Cooma	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Cooma	Red Energy	Business Saver	0	0	0	0
NSW	AGN Holbrook	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Murray Valley	EnergyAustralia	Total Plan	19	0	0	0

NSW	AGN Murray Valley	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Murray Valley	AGL	Essentials Saver	0	0	0	0
NSW	AGN Tumut	Origin Energy	Business Flexi	12	0	0	0
NSW	AGN Tumut	Red Energy	Business Saver	0	0	0	0
NSW	AGN Wagga Wagga	Origin Energy	Business Flexi	12	0	0	0
QLD	APT Brisbane South	AGL	Business Essential Saver	0	0	0	0
QLD	APT Brisbane South	Origin Energy	Business Flexi	6	0	0	0
QLD	APT Brisbane South	Red Energy	Business Saver	0	0	0	0
QLD	Envestra Brisbane North	AGL	Business Essential Saver	0	0	0	0
QLD	Envestra Brisbane North	Origin Energy	Business Flexi	6	0	0	0
QLD	Envestra Brisbane North	Red Energy	Business Saver	0	0	0	0
QLD	Envestra Northern	Origin Energy	Business Flexi	6	0	0	0
QLD	Envestra Wide Bay	AGL	Business Essential Saver	0	0	0	0
QLD	Envestra Wide Bay	Origin Energy	Business Flexi	6	0	0	0
SA	Envestra SA	AGL	Standing offer	0	0	0	0
SA	Envestra SA	EnergyAustralia	Total Plan Business	14	0	0	0
SA	Envestra SA	Origin Energy	Business Flexi	6	0	0	0
SA	Envestra SA	Simply Energy	Business Plus	0	0	0	0
SA	Envestra SA	Red Energy	Business Saver	0	0	0	0
SA	Envestra SA	Lumo Energy	Basic	0	0	0	0
TAS	TGN	Aurora	Small business	0	0	0	0
TAS	TGN	Tas Gas	Small business	0	0	0	0
VIC	Multinet 1	AGL	Business Essentials Saver	0	0	0	0
VIC	Multinet 1	Click Energy	Business Start Gas	0	0	0	0
VIC	Multinet 1	Covau	Smart Saver	0	20	0	0
VIC	Multinet 1	EnergyAustralia	Total Business	21	0	0	0
VIC	Multinet 1	Lumo Energy	Value	0	0	3	0
VIC	Multinet 1	Momentum Energy	Market offer	0	0	0	0



VIC	Multinet 1	Origin Energy	Flexi	0	23	0	0
VIC	Multinet 1	Simply Energy	Business Plus	0	0	0	0
VIC	Multinet 1	Amaysim	Gas as you go	0	0	0	0
VIC	Multinet 1	Powershop	Shopper	0	0	5	0
VIC	Multinet 1	Red Energy	Red Saver	0	0	10	0
VIC	Multinet 2	AGL	Business Essentials Saver	0	0	0	0
VIC	Multinet 2	Click Energy	Business Start Gas	0	0	0	0
VIC	Multinet 2	Covau	Smart Saver	0	20	0	0
VIC	Multinet 2	EnergyAustralia	Total Business	21	0	0	0
VIC	Multinet 2	Lumo Energy	Value	0	0	3	0
VIC	Multinet 2	Momentum Energy	Market offer	0	0	0	0
VIC	Multinet 2	Origin Energy	Flexi	0	23	0	0
VIC	Multinet 2	Simply Energy	Business Plus	0	0	0	0
VIC	Multinet 2	Amaysim	Gas as you go	0	0	0	0
VIC	Multinet 2	Powershop	Shopper	0	0	5	0
VIC	Multinet 3	Red Energy	Red Saver	0	0	10	0
VIC	Ausnet Central 1	AGL	Business Essentials Saver	0	0	0	0
VIC	Ausnet Central 1	Click Energy	Business Start Gas	0	0	0	0
VIC	Ausnet Central 1	Covau	Smart Saver	0	20	0	0
VIC	Ausnet Central 1	EnergyAustralia	Total Business	21	0	0	0
VIC	Ausnet Central 1	Lumo Energy	Value	0	0	3	0
VIC	Ausnet Central 1	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet Central 1	Origin Energy	Flexi	0	23	0	0
VIC	Ausnet Central 1	Simply Energy	Business Plus	0	0	0	0
VIC	Ausnet Central 1	Amaysim	Gas as you go	0	0	0	0
VIC	Ausnet Central 1	Powershop	Shopper	0	0	5	0
VIC	Ausnet Central 1	Red Energy	Red Saver	0	0	10	0
VIC	Ausnet Central 2	AGL	Business Essentials Saver	0	0	0	0

VIC	Ausnet Central 2	Click Energy	Business Start Gas	0	0	0	0
VIC	Ausnet Central 2	Covau	Smart Saver	0	20	0	0
VIC	Ausnet Central 2	EnergyAustralia	Total Business	21	0	0	0
VIC	Ausnet Central 2	Lumo Energy	Value	0	0	3	0
VIC	Ausnet Central 2	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet Central 2	Origin Energy	Flexi	0	23	0	0
VIC	Ausnet Central 2	Simply Energy	Business Plus	0	0	0	0
VIC	Ausnet Central 2	Amaysim	Gas as you go	0	0	0	0
VIC	Ausnet Central 2	Powershop	Shopper	0	0	5	0
VIC	Ausnet Central 2	Red Energy	Red Saver	0	0	10	0
VIC	Ausnet West	AGL	Business Essentials Saver	0	0	0	0
VIC	Ausnet West	Click Energy	Business Start Gas	0	0	0	0
VIC	Ausnet West	Covau	Smart Saver	0	20	0	0
VIC	Ausnet West	EnergyAustralia	Total Business	21	0	0	0
VIC	Ausnet West	Lumo Energy	Value	0	0	3	0
VIC	Ausnet West	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet West	Origin Energy	Flexi	0	23	0	0
VIC	Ausnet West	Simply Energy	Business Plus	0	0	0	0
VIC	Ausnet West	Amaysim	Gas as you go	0	0	0	0
VIC	Ausnet West	Powershop	Shopper	0	0	5	0
VIC	Ausnet West	Red Energy	Red Saver	0	0	10	0
VIC	AGN Central 1	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN Central 1	Click Energy	Business Start Gas	0	0	0	0
VIC	AGN Central 1	Covau	Smart Saver	0	20	0	0
VIC	AGN Central 1	EnergyAustralia	Total Business	21	0	0	0
VIC	AGN Central 1	Lumo Energy	Value	0	0	3	0
VIC	AGN Central 1	Momentum Energy	Market offer	0	0	0	0
VIC	AGN Central 1	Origin Energy	Flexi	0	23	0	0

VIC	AGN Central 1	Simply Energy	Business Plus	0	0	0	0
VIC	AGN Central 1	Amaysim	Gas as you go	0	0	0	0
VIC	AGN Central 1	Powershop	Shopper	0	0	5	0
VIC	AGN Central 1	Red Energy	Red Saver	0	0	10	0
VIC	AGN Central 2	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN Central 2	Click Energy	Business Start Gas	0	0	0	0
VIC	AGN Central 2	Covau	Smart Saver	0	20	0	0
VIC	AGN Central 2	EnergyAustralia	Total Business	21	0	0	0
VIC	AGN Central 2	Lumo Energy	Value	0	0	3	0
VIC	AGN Central 2	Momentum Energy	Market offer	0	0	0	0
VIC	AGN Central 2	Origin Energy	Flexi	0	23	0	0
VIC	AGN Central 2	Simply Energy	Business Plus	0	0	0	0
VIC	AGN Central 2	Amaysim	Gas as you go	0	0	0	0
VIC	AGN Central 2	Powershop	Shopper	0	0	5	0
VIC	AGN Central 2	Red Energy	Red Saver	0	0	10	0
VIC	AGN North	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN North	Click Energy	Business Start Gas	0	0	0	0
VIC	AGN North	Covau	Smart Saver	0	20	0	0
VIC	AGN North	EnergyAustralia	Total Business	21	0	0	0
VIC	AGN North	Lumo Energy	Value	0	0	3	0
VIC	AGN North	Momentum Energy	Market offer	0	0	0	0
VIC	AGN North	Origin Energy	Flexi	0	23	0	0
VIC	AGN North	Simply Energy	Business Plus	0	0	0	0
VIC	AGN North	Amaysim	Gas as you go	0	0	0	0
VIC	AGN North	Powershop	Shopper	0	0	5	0
VIC	AGN North	Red Energy	Red Saver	0	0	10	0
WA	South West	Alinta Energy	Business	0	0	0	0
WA	South West	AGL	Business Savers	0	45	0	0

WA	South West	Origin	Business Flexi	0	30	0	0
WA	Albany	Alinta Energy	Business	0	0	0	0
WA	Kalgoorlie	Alinta Energy	Business	0	0	0	0