

The national voice
for residential and
small business

Annual Report **20 24**

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Energy Consumers Australia respectfully acknowledges the Traditional Owners of Country throughout Australia. We recognise their connection and continuous care for the lands and waters where we live, learn, and work.

“Better quality, thermally efficient and healthy houses prevent illnesses. Houses are a determinant of health. We need to identify, acknowledge and address the discrimination inherent to households that suffer with unaffordable energy bills and hot unhealthy homes.”

- Dr. Kim Loo, Deep Dive Workshop Participant

“If support isn't provided to those who need it, then this area risks becoming a real 'have/have not' divide.

We shouldn't have a system where only those lucky enough to afford the best or newest reap the benefits.”

– Participant in Power Up project focus group

“Will I have to choose between putting food on the table, clothes on our backs or keeping the lights on? [...]. I try so hard not to let it worry me, but it does. I rent so I cannot install solar, so the price of electricity is one of my main concerns.”

– Participant in ECA focus group





From our Chair

At Energy Consumers Australia (ECA), we are committed to ensuring that the transition is managed in a way that is least-cost, fair, and reflects the community's interests. It goes without saying that households and small business operators will play a critical role in making the energy transition successful.

This year we've seen some substantial outcomes arising from ECA's longstanding advocacy for consumers.

In July 2024, Energy Ministers agreed to progress a package of consumer reforms that we have long called for. These will help all consumers access cheaper energy deals, increase support for people experiencing hardship, and deliver more protections for households and small businesses. The reforms will also look at tariff structures.

Our advocacy to governments and market bodies for a plan for consumer energy resources (CER) also led to an announcement from Energy Ministers in March 2024 that governments would create a National CER Roadmap.

We will be working with governments on the implementation of both of these reform packages in the 2024-25 financial year.

I am particularly pleased with ECA's growing focus this year on achieving positive energy outcomes for Australia's 2.5 million small businesses. In 2023-24, we published our Small Business Energy Information research and the Power Over Their Power report, both of which have furthered understanding of the barriers small businesses face in engaging in energy policy matters and with the energy transition.

The latter recommended that a small business roundtable be established to enable small business representatives to talk directly to government about energy. Following conversations with government, ECA will be facilitating this next year.

Of course, we couldn't achieve what we do without the tireless efforts of the many other advocates and decision makers in the energy field. We will continue to work together with these bodies, and aim to accomplish even more in the coming year.

I would like to pay tribute to Louise Sylvan, whose nine-year service as ECA's inaugural Chair ended in January. I am fortunate to inherit a skilled and strategic Board, and I thank them for their expertise, contributions, and unity.

Finally, I want to acknowledge and sincerely thank the ECA team, led by our CEO Dr Brendan French, for their commitment and hard work. I'm proud to be part of an organisation where passion and intelligence come together so effectively.

Dr Michael Schaper FAICD
Chair
Energy Consumers Australia

From our CEO

When I joined Energy Consumers Australia as CEO last September, I knew I would be leading an impactful organisation playing a significant role driving change across the energy system to benefit consumers. I haven't been disappointed.



Our organisation champions an energy system from which all Australians can benefit and where households and small businesses are supported and empowered to navigate the energy transformation. We also want to see a decarbonised energy system that is fair and doesn't add to social and economic inequalities. While there is so much still to achieve, I am genuinely proud of the steps we have taken over the last year fulfilling the vision of an energy system that provides affordable, clean, reliable energy for everyone.

This document looks back at our achievements and reports against the final year of our Strategic Plan 2021-24. In the coming year we will implement an invigorated strategy that will see ECA advocate more strongly than ever before for all consumers. With the transition to clean energy in full swing there has never been more need for this. I would like to take this opportunity to thank the Board for the opportunity to lead Energy Consumers Australia during this crucial time. I am reminded daily of the responsibility, challenges and honour that entails.

I want to pay tribute to Louise Sylvan, whose time as our inaugural Chair came to an end during the year.

Louise's stewardship of Energy Consumers Australia's first nine years has seen it go from strength to strength. I would also like to acknowledge Jacqueline Crawshaw for her work as Interim Chief Executive Officer before I arrived in September 2023 and for her continuing leadership on behalf of consumers.

Building coalitions is at the heart of our mission, and so much of our impact is achieved in collaboration with our partners, grant recipients and stakeholders. I thank them for their passion and commitment to a better energy system for all consumers. I would also like to acknowledge and thank all the contributors, contractors, and consultants we have worked with throughout the year.

Finally, thank you to the wonderful Energy Consumers Australia team. Their collective insight, integrity and persistence converts into the rigorous evidence and advocacy that makes ECA such a trusted and influential voice for residential and small business consumers. Although it always feels like there is so much more to do in an organisation like ours, I continue to be inspired by their hard work and dedication, and their passion for better outcomes for all Australians.

Dr Brendan French
CEO
Energy Consumers Australia

Our Vision, Values, Mission and Purpose

Vision

Consumer values, expectations and needs are realised through a modern, flexible and resilient energy system.

Values

We are independent: we are rigorous and inquisitive in challenging the status quo.
We are evidence-based: what we think, say and do is supported by research.
We work collaboratively: we are inclusive in our engagement and open in our communications.

Mission

We research and understand consumer expectations, values and needs.
We proactively shape a vision for the future, set priorities, influence, and work with others to drive change across the energy system to benefit consumers.

Purpose

To influence the shape of the energy system now and in the future by creating a trusted and influential voice for residential and small business energy consumers.

2021-24 Strategic Plan Objectives

Prices at affordable levels that deliver value for money for households and small businesses

Markets that work for consumers, with fit-for-purpose consumer protections and support for consumers in vulnerable circumstances

A decentralised, distributed energy system that provides affordable, abundant and clean energy, while being safe, secure and reliable

Reporting against our strategic priorities for FY23-24

In 2023-24, ECA produced its first-ever published annual workplan. The workplan was developed to ensure our daily work is organised according to the goals and priorities that derive from the vision, mission, purpose, and values laid out in our 2021-24 Strategic Plan.

The workplan lays out why we do what we do, as well as how we do it, in the form of five organisational goals that identify the ECA infrastructure we rely on to do our job. These five goals are shown below and form the five pillars we are reporting our work against in this annual report.

Understanding consumers Research and Grants Team We initiate and fund robust evidence of consumers' values, expectations and experience and reframe the energy transformation opportunities and challenges from a consumer perspective.	A least-cost future energy system Energy System Transformation Team We ensure through our advocacy that energy infrastructure is well planned and operated.	Markets that work for consumers Energy Services and Markets Team We advocate for Australian consumers to ensure that regulatory frameworks, markets, services and initiatives are designed for those that use and pay for them.	Inclusive and affordable access to energy Energy Inclusion Team We champion an energy system from which all Australians can benefit, and an adequate safety net that recognises and tackles structural disadvantage and circumstantial vulnerability.	Consumer Agency Communications Team We empower consumers to navigate the energy transformation challenge and play a key role in building consumer agency.
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All the key activities, impacts, ECA work and grants case studies in the sections that follow directly relate to meeting the policy priorities that sit underneath these five 'pillars', which are identified in our 2023-24 Workplan (published on our website). These policy priorities have guided what we do and how we have achieved beneficial change for consumers across the year.

Year at a glance

ECA's year in numbers:



1. Understanding consumers

We will initiate and fund robust evidence of consumers' values, expectations and experience and reframe the energy transformation opportunities and challenges from a consumer perspective.

Key activities:

1. Energy Consumer Surveys

Our regular consumer sentiment and behaviour surveys are the most comprehensive ongoing research studies of the attitudes and activity of residential and small business energy consumers in Australia.

The Energy Consumer Sentiment Survey (ECSS), published in December 2023 and June 2024, explores how consumers think and feel about the energy market, including key issues like value for money for electricity, confidence participating in energy markets and satisfaction with energy services.

The Energy Consumer Behaviour Survey (ECBS), published in October 2023, explores how consumers use energy, asking questions about appliance, solar, storage and electric vehicle uptake, when consumers use their appliances and how willing they are to change the way they use their energy.

In May 2024 we migrated our consumer surveys to our main ECA website to create a simplified user experience that enables policymakers to easily download the data for use.

2. SME Tariff Tracker

Our Small and Medium Enterprise (SME) Retail Tariff Tracker, published in December 2023 and June 2024, is an ongoing project for Energy Consumers Australia. It collects data on electricity and gas price offers for small businesses.

Through the SME retail tariff tracking project, ECA continues to build the evidence base of the costs facing small businesses, particularly those that are energy intensive and are unable to pass on those costs.

3. Power Over Their Power report

During FY2023-24, ECA engaged Small Biz Matters to conduct interviews with more than 30 small business organisations, peak bodies and representatives to discover the issues small businesses face in reducing energy costs and transitioning to renewable energy, and the key considerations for policymakers when designing small business energy policy. Alexi Boyd from Small Biz Matters then undertook a national roadshow to elevate the small business needs uncovered in the report to governments, market bodies and ombudsman offices across Australia.

4. Household and Small Business Energy Information Research

Born from findings from our consumer surveys, and a request from Energy Ministers to provide insight into what ‘good’ should look like for a communications campaign to inform consumers about how to reduce their energy use and bills, our year-long Household and Small Business Energy Information research project uncovered a lot more.

Conducted over three stages, the research included an international scan of best practice in consumer information campaigns about energy, a national survey of households and small businesses and in-depth online discussions and message testing with different consumer segments to uncover what information consumers want, how they wish to receive it, and when and who they trust to tell them about energy.



Source: SME Energy Consumer Information Research, The Insight Centre, Nov 2023

We have published the full findings on our website and provided 25 online workshops so far for federal, state and territory governments, local government organisations, market bodies, ombudsman offices and regulators, retailers and networks across Australia. We will continue to provide briefings and workshops in FY2024-25 and to build on the findings in our work.

5. ECA Grants Program

In 2023-24, ECA continued to fund advocates and researchers to undertake high quality innovative research projects that deliver benefits to consumers, filling in gaps in knowledge for policymakers and identifying areas where further action is needed to benefit households and small businesses. For more information on ECA’s grants program, see the case studies in this report and the accompanying FY2023-24 Grants Supplement.



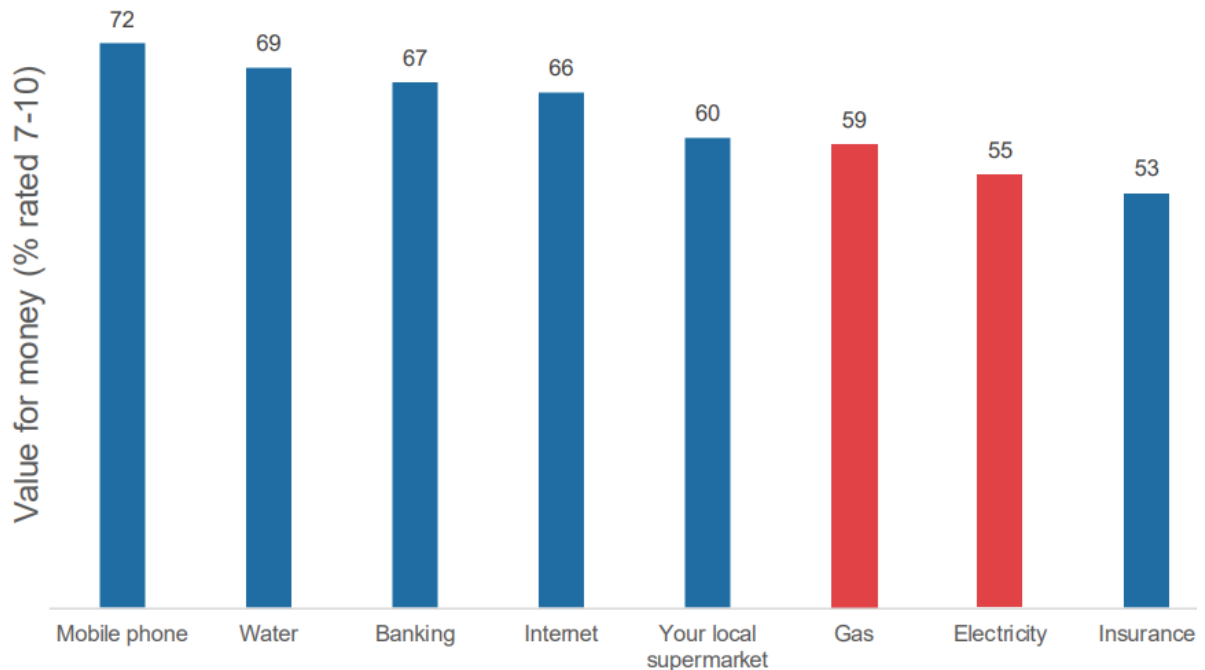
KEY IMPACTS

- The Power Over Their Power report recommended that a small business roundtable be established to enable small business representatives to talk directly to government about energy. Following conversations with government, ECA will be facilitating this to take place in FY2024-25.
- We are seeing regular evidence and receiving ongoing feedback that our Household and Small Business Energy Information findings and best-practice guide for governments is changing for the better the way that governments and industry think about communicating with consumers and deliver public information campaigns about energy.

Consumer research that matters

Our consumer survey results continue to be cited widely in the media, and the insights they provide – straight from the mouths of thousands of consumers – enable ECA to facilitate meaningful discussions with governments and market bodies about the policies and incentives that are needed to support households and small businesses.

The latest ECSS, released in June 2024, delved into consumers' perceptions of value for money, asking them to compare their gas and electricity service with various other services, including – for the first time – supermarkets.



Source: Rate the overall value for money by your service provider in the above areas, [Energy Consumer Sentiment Survey, June 2024](#)

The fact that consumers viewed gas and electricity as lesser value for money than supermarkets – at a time when the Australian Competition and Consumer Commission (ACCC) has been running a pricing inquiry into the sector – enabled ECA to tell a compelling story about affordability but also trust.

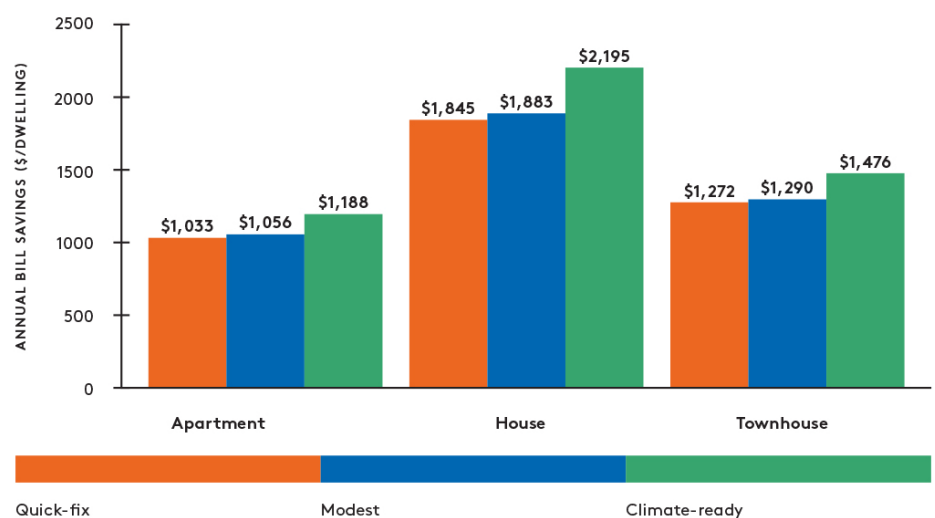
Modelling our energy inefficient homes

Recognising the harm of energy inefficient homes on energy bills, as well as people’s health and wellbeing, we continued to commit significant resources, including through our grants program, to building the evidence base to inform the design of effective policies and programs.

In December 2023, Climateworks Centre delivered a report – *Climate-ready homes: Building the case for a renovation wave in Australia* – as part of a program of work which ECA both funds and participates in. Given that most homes that will be standing in 2050 have already been built, the report filled a critical evidence gap in Australia’s understanding about the energy inefficiency of existing Australian homes.

The report highlighted the scale and complexity of the challenge, including that different solutions are required across climate zones. This robust modelling is being widely used in government and industry policy and program design. The research was used to support the establishment of the \$1.3 billion Household Energy Upgrades Fund, administered by the Clean Energy Finance Corporation.

Annual bill savings after energy performance upgrades



Average annual bill savings per home type for three levels of thermal upgrade and full electrification of appliances. Figures based on current gas and electricity prices, which are likely to change in the future.

Source: Climate-Ready Homes: Building the case for a Renovation Wave in Australia, Climateworks Centre, November 2023



FEATURED GRANT CASE STUDY

ECA Influence Grant: Small Steps. Bright Future: Supporting Small Business Toward Net Zero & Beyond

Rising energy costs have hit small businesses harder than COVID, with over one third of small businesses experiencing energy hardship in the past 12 months. And while small businesses are interested in participating in Australia's transition to net zero, almost half of all businesses have yet to take any action. This is in large part because one in three small businesses don't know who to go to for advice, support, and tools to support them in the energy transition – a finding consistent with our Small Business Energy Consumer Information Research. The Council of Small Business Organisations Australia (COSBOA), enabled by an ECA grant, conducted research to better understand the impact of energy hardship on small businesses and possible pathways to address this.

However, the pathways and solutions can differ depending on the type of business. COSBOA's research identified three main types of small businesses – fixed, swifts, agiles – and considered their motivation, ability and opportunity to navigate the energy transition. The intention is for governments, policymakers, and small business advisors to use this framework to provide tailored support to support small businesses.

The report was launched in Adelaide, in conjunction with an industry workshop, where local small businesses had the opportunity to discuss how they could directly apply the findings of the research to their business. This was followed by an Industry Leaders Lunch where the framework was presented to South Australian politicians, industry leaders, and small business representatives.



Above: COSBOA report launch, Adelaide, South Australia

2. A least-cost future energy system

We will ensure through our advocacy that energy infrastructure is well planned and operated.

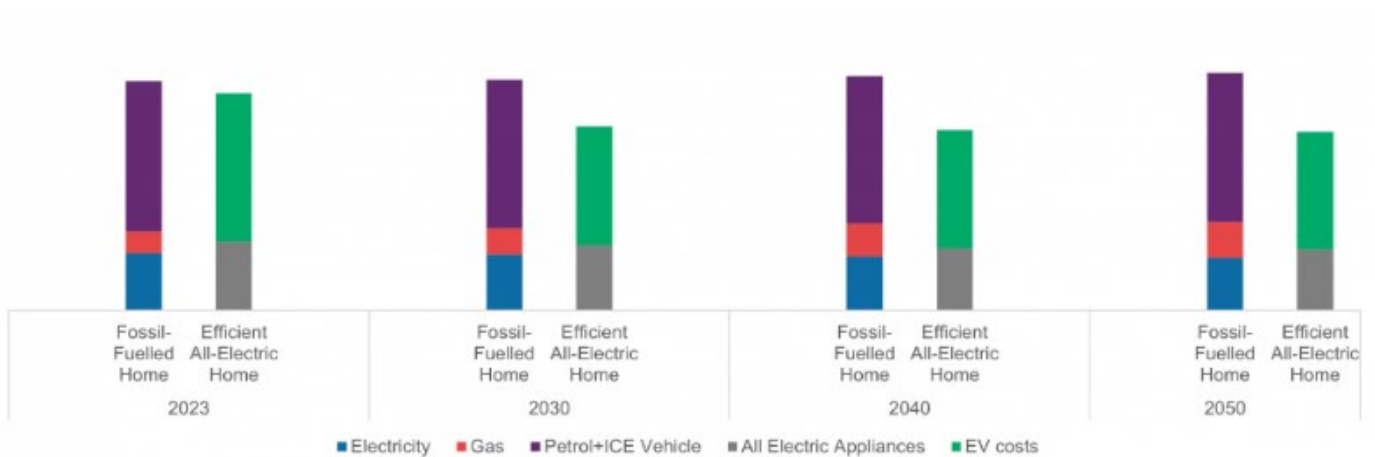
Key activities:

1. Stepping Up report

ECA's flagship *Stepping Up: A smoother pathway to decarbonising homes* report ignited the economic case for consumer electrification, with modelled evidence from CSIRO and Dynamic Analysis finding the average household stood to save more than \$2,000 a year by 2030 from going all-electric in comparison to a fossil-fuelled household – even without solar panels or a battery.

The report also found that as more and more consumers exit the gas network, those who face barriers such as renters and apartment dwellers, or people who are unable to afford to make the switch to an all-electric home, will face spiralling gas bills, building the case for the need for government supports to help consumers transition off gas.

The report had 290 individual media mentions in mainstream broadcast and publications, and in industry media, within the first fortnight of publication. ECA published the modelling in full on our website and conducted extensive online briefings with all three levels of government, market bodies and industry.



Source: Total Household Energy Spending in Select Years, ECA *Stepping Up* report, CSIRO and Dynamic Analysis

2. 21st Century Energy System Planning Webinars

ECA collaborated with global experts to deliver four webinars for Australian policymakers, practitioners and industry, exploring varied approaches and best practices in energy system planning to benefit consumers. In particular, the webinars elevated the need for reforms to the Integrated System Plan (ISP), and were timed to coincide with the Commonwealth's review of the ISP. Potential reforms include a more symmetrical approach to demand and supply-side planning, and consideration of demand-side options such as energy efficiency and consumer hot water storage, batteries, and other forms of flexible use that help avoid or defer costly, large-scale infrastructure.

The webinars also provided the opportunity for attendees to ask questions of the Commonwealth Government and AEMO representatives working on the ISP. Hundreds attended the webinars, and hundreds more have since viewed the sessions on ECA's YouTube channel.

3. Building capacity for consumer advocacy

ECA funded the University of Melbourne to develop and deliver a modular online and in-person course with the goal of helping consumer advocates to better engage on the energy transition.

More than 150 experienced and aspiring consumer advocates registered for the free course, including many who had come into contact with ECA through our work this year with diverse community organisations.

For more information on ECA's grants program, see the case studies throughout this report and the accompanying FY2023-24 Grants Supplement.



KEY IMPACTS

- The City of Sydney publicly said that Stepping Up was a crucial piece of evidence for its decision to consider banning new gas connections in Sydney CBD.
- Our Stepping Up report was cited by 10 organisations, including networks and retailers, in their submissions to the Senate Electrification Inquiry.
- Following the 21st century energy system planning webinars, Energy Ministers agreed to enhance the ISP to improve its ability to plan for the transformation of the entire energy system.
- In 2023-24, ECA conducted an analysis of trends in gas customer numbers and connection rates and recommended the AER undertake monthly reporting. That is now happening.

Empowered network reset consumer panels

Through the Consumer Empowerment Funding Program, which was developed to support and resource consumers engaged in network reset panels, ECA funded the delivery of an independent consumer report from the SA Power Network's (SAPN) Community Advisory Board.

The report assessed the impact of SA Power Network's (SAPN) community engagement on its reset proposal and the impact of the proposal on consumers and their interests. It highlighted engagement limitations, opportunities for further involvement of SAPN's consumer advisory board, and limitations of the regulatory framework, making recommendations that have relevance for how all networks conduct their reset proposals.

Inclusion of Virtual Power Plants in the Capacity Investment Scheme

ECA advocated for the inclusion of consumer energy resources (CER) and Virtual Power Plants (VPPs) alongside large-scale renewable generation and transmission in the Commonwealth Government's Capacity Investment Scheme (CIS).

While we were not successful in getting CER included in the CIS, the CIS Design Paper released in March 2024 did include VPPs. The Commonwealth Government has now developed a CER Roadmap for Australia, recognising the important role CER will play in the future of the energy system for consumers.



FEATURED GRANT CASE STUDY

ECA Influence Grant: UTS Institute for Sustainable Futures - Reimagining network utilisation in the era of consumer energy resources

Network costs make up roughly 50% of the average household energy bill, and they are rising. If Australia simply builds more networks, instead of using the ones we have more efficiently, the benefits of low-cost renewable energy will be offset by these costs. Also, as customers adopt solar, batteries and EVs, how we gauge over- or under-investment in power networks needs to adapt. Consumers are currently paying more than they need for their electricity because networks are underutilised.

With the support of an ECA grant, the UTS Institute for Sustainable Futures (ISF) is developing new metrics to update 'network utilisation' to measure and improve electricity network productivity.

ISF's work will consider two-way flows on the network and unmask localised network constraints. Better measures of network utilisation (or alternative metrics clustering around a similar purpose) can address these issues to inform network planning, highlight stranded asset risks, and incentivise non-network solutions – and if network utilisation can be more effectively measured, it will deliver better outcomes for consumers and help ensure a least-cost energy transition.

ISF's project is guided by an experienced Stakeholder Reference Group comprising advocates, regulators, networks, CER companies and researchers.

ECA intends that new metrics will highlight how efficiently networks are operating and how efficiently they're integrating CER, which will in turn arm the AER to help ensure a least-cost network infrastructure for everyone.

3. Markets that work for consumers

We will advocate for Australian households and small businesses to ensure that regulatory frameworks, markets, services and initiatives are designed for those that use and pay for them.

Key activities:

1. PowerUp: Consumer Voices in the Energy Transition

PowerUp was a research project, designed collaboratively with The Insight Centre, which aimed to understand consumer needs, values and expectations of Consumer Energy Resources (CER) integration and the wider energy transition, and to elevate consumer voices in how CER evolves in Australia.

The report synthesised key insights from consumer voices from a survey, three-day discussion forums, and in-depth interviews, looking at how consumers feel about the trade-offs they may be asked to make in the future, including third party control of CER, adjusting their energy use patterns, and coping with planned disruptions, and what they value and expect from decision-makers.

“Hmm, I like the idea of a "smart home" but having someone else in control of it doesn't sit well with me. I think if the tech exists to power down a home when no-one is there etc, then yes. But I don't think it needs to have a 3rd party in control of it.”

‘Change Ready’ Participant in Power Up focus group

2. Unlocking the Value of Community-Scale Storage for Consumers

ECA commissioned The Brattle Group to conduct exploratory research into the potential value of community batteries for consumers, as an important first step in beginning to understand this area. The report investigates the opportunities of community-scale batteries for consumers, identifies barriers to community-scale storage deployment and adoption, and determines approaches for overcoming these barriers.

We presented the findings of the research at the 2nd Future of Neighbourhood Batteries in Australia conference at the Australian National University (ANU). The conference was part-funded by ECA as part of a grant we had provided for ANU's Keeping the Community in Community Batteries research program.

3. Submissions

In 2023-24, ECA made 30 submissions on behalf of households and small businesses on market policy issues ranging from tariffs and pricing to the importance of effective customer safeguards in the rollout of smart meters and how best to ensure that CER assets are integrated into the energy system in ways that benefit their owners and the broader community.

We also made a number of submissions on specific small business energy issues, including giving evidence to the Senate Committee on the Small Business Energy Incentive.

In addition to representing the interests of households and small businesses, the submissions we make to governments, market bodies and industry, form an evidence base that helps the work of other consumer advocates. This year we have looked for further opportunities to work collaboratively with other organisations to produce joint submissions. For example, we partnered with other consumer advocates and Victorian community sector organisations to provide feedback on the Victorian Default Offer.

4. Advocating from our grants-funded research

Using the findings of research we funded through our Grants Program from the University of Queensland, ECA gave evidence to the *Queensland Electricity Connection Manual Consultation*, the *NSW Consumer Energy Strategy*, and the House of Representatives Standing Committee on Climate Change, Energy, Environment and Water *Inquiry into the transition to electric vehicles*.



KEY IMPACTS

- In July 2024, Energy Ministers agreed to progress a package of consumer reforms that ECA had long called for to help all consumers access cheaper energy deals, increase support for people experiencing hardship, and deliver more protections for households and small businesses. The reforms will also look at tariff structures. We will be working with governments on the reform package in FY2025.
- A review of electricity pricing rules was also announced in June 2024 after ECA led calls for change on network tariff reform and how retailers structure offers.
- The Australian Energy Regulator's (AER) latest Default Market Offers reflected ECA's advocacy that the allowance for retailer margin should be reduced.
- Our advocacy to governments and market bodies for a plan for consumer energy resources (CER) (such as household batteries, EVs and heat pumps), led to an announcement at the Energy and Ministerial Council meeting in March 2024 that governments would create a National CER Roadmap. Energy Ministers published the Roadmap in July 2024 and we look forward to working with governments on the Roadmap in FY2025.
- As the smart meter rollout accelerates, ECA has strongly argued that consumers should not pay direct costs of metering installations, must have access to real time energy data from their meter, and should not automatically be reassigned to Time of Use tariffs when a smart meter is installed. We have also pushed for a clear, consistent communications campaign to accompany the rollout. We will continue to work closely with the AEMC to ensure these outcomes for Australians.

New energy services and markets that work for consumers

We believe that people should be fairly rewarded for being flexible and for shifting the time of day that they consume energy as this provides benefits to the system. Equally, we believe that people who are unable to shift their time of use or the amount of energy they use – for example, people with young children or those who run energy-intensive businesses – should not be punished for this.

ECA conducted research this year that revealed consumers may be interested in the ability to separate CER use (for example EV charging), which they can be flexible about, from their more everyday electricity use (for example cooking), which they need to do at certain times of day – but less interested in having different retailers for each. Although further research is needed, this was the first time anyone had looked at what consumers might think about these kinds of choices. Working with the Public Interest Advocacy Centre (now the Justice and Equity Centre), we pushed for changes to the AEMC's initial approach to flexible trading arrangements. In February 2024, the AEMC altered its initial proposal in its Draft Determination in line with our consumer findings.

Protecting consumers in rapidly evolving markets

Pushing for stronger protection of households and small businesses in embedded networks was a key focus for ECA in 2023-24. The number of consumers living and owning business premises within embedded networks is growing exponentially, which means large growth in the population of people without access to the energy consumer protection framework.

Through submissions and other engagement, we have highlighted the challenges for these consumers. For example, a remarkable 62 per cent of small businesses within a shopping centre or embedded network (where they pay a landlord for energy) say they are in energy hardship. As a starting point, the absence of a clear map of embedded networks must be addressed.

ECA made submissions on embedded networks to the AER, the NSW Independent Pricing and Regulatory Tribunal (NSW IPART) and the WA Government. In our submissions, we have called for a review of all instances where normal energy consumer protections do not apply to consumers in embedded networks, and full consideration of why this is acceptable.



FEATURED GRANT CASE STUDY

Gill Owen Scholarship: Rob McLeod - Extreme heat resilience: lessons from Spain for Australia

Dealing with the threat of increasingly extreme heatwaves due to climate change is a challenge for Australia – but it is also a global problem, so it makes sense to look abroad to examine what potential policy solutions have already been developed.

In 2023, Gill Owen Scholarship winner, Rob McLeod, spent two months travelling around Spain in a bid to understand local responses to heatwaves and extreme heat events in the context of critical challenges to energy systems.



Spain, which has a climate not dissimilar to Australia's, has implemented a wide range of responses and activities to help people adapt to extreme heat events. One of the more interesting is Seville's world-first system to categorise and name heatwaves in a model based on international practices towards other weather events such as cyclones or hurricanes.

In his report, *Extreme heat resilience: lessons from Spain for Australia*, Rob McLeod advocated for Australia to do the same, and to adopt a framework for alerts and communications that builds on Seville's heatwave naming approach, towards other weather events such as cyclones or hurricanes.

Assisted by ECA, Rob's report, released in January during a period of hot weather in Australia, captured the attention of the media and governments.

Left: Gill Owen Scholar, Rob McLeod, travelled to Spain to understand local responses to heatwaves

4. Inclusive and affordable access to energy

We champion an energy system from which all Australians can benefit, and an adequate safety net that recognises and tackles structural disadvantage and circumstantial vulnerability.

Key activities:

1. **Insights Report: Understanding the diversity of consumers and their experiences of the energy system**

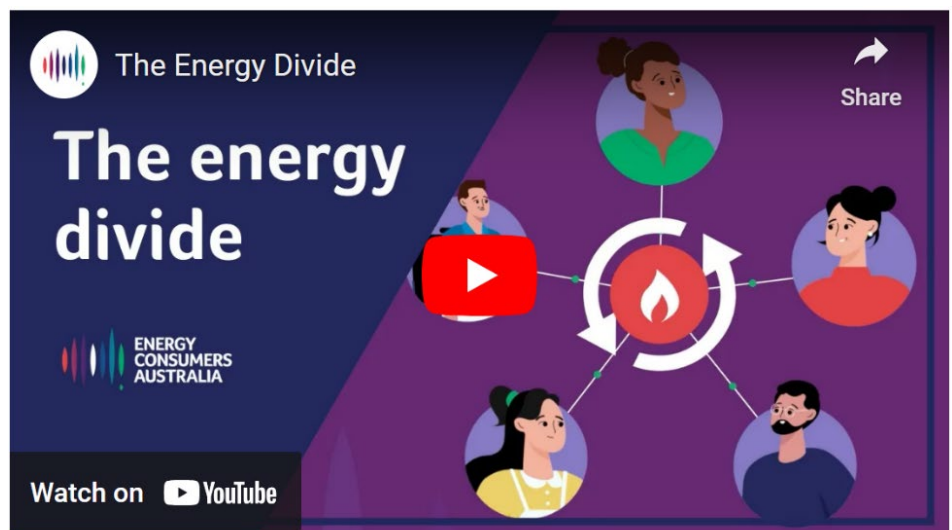
We collaborated with Sydney Community Forum's Voices for Power program on a series of deep dive workshops with nearly 50 culturally and linguistically diverse community leaders and shared the results with governments in well attended webinars.

2. **Understanding the Energy Divide report**

The energy divide is the rapidly growing gap between consumers who can easily access efficient, reliable, and affordable energy, and those who cannot. ECA's research on this issue, which has been ongoing for a number of years, suggests that to close the energy divide, the energy system needs to be designed to meet the needs of diverse consumers with different abilities and motivations. We will continue to advocate on this critical issue.

Understanding the Energy Divide

This report and video forms part of our ongoing advocacy for all consumers to have access to efficient, reliable and affordable energy.



3. Submissions

Over the year, ECA made a number of submissions on behalf of consumers in financial difficulty. Our submission on the AER's Draft Customer Engagement Toolkit in April 2024 recommended that energy businesses could do better by their most vulnerable customers by explicitly agreeing to implement the better practice principles and reporting on their performance to the AER. We also recommended that small business energy hardship be given the attention it deserves.



KEY IMPACTS

- The AER updated its 2024-25 Compliance and Enforcement Priorities in response to the Insights Report recommendation to improve retailer provision of interpreter services, particularly for consumers already experiencing vulnerability. The AER is now engaging directly with the Sydney Community Forum's 'Voices for Power' participants as an input to its Review of payment difficulty protections in the National Energy Customer Framework.
- The Commonwealth Government and the AER put the reform of prepayment meters and energy supply in remote communities on their agenda, in response to advocacy based on ECA-funded research.
- Our framing of the 'energy divide' as something broader than just the proportion of energy costs relative to income has been influential on the international discussion around energy justice and exclusion and was shared by the UK's Energy Research Centre.
- ECA Participation Grant funding enabled Uniting to provide lived evidence of the experience of customers struggling with energy bills, and the financial counsellors who assist them, to the AER's review of the Payment Difficulty Framework. The AER is currently considering adopting the Victorian framework, which provides better consumer protections.

Advocating for consumers on pre-payment meters

In 2023-24, we continued to work with Original Power and the First Nations Clean Energy Network to shine a light on levels of harm being experienced by people using prepayment electricity meters in remote areas. The evidence base created by our grant last year to the Centre for Aboriginal Economic Policy Research at the Australian National University contributed to the Commonwealth Government and the AER putting the reform of prepayment meters and energy supply in remote communities on their agenda.

ECA's submission to the Department of Climate Change, Energy, the Environment and Water on the First Nations Clean Energy Strategy Consultation Paper strongly supported the idea of a proposed right to energy that is affordable, reliable and clean. We will be building on this work in FY2025.

Fit-for-purpose frameworks to support consumers in vulnerable circumstances

As mentioned above, this year we collaborated with Sydney Community Forum's 'Voices for Power' program to undertake a deep dive into the diversity of consumers and their experiences of the energy system. With Thriving Communities Australia, we co-designed a research methodology to enable us to understand in depth the experiences and issues of a diverse group of consumers.

In a series of workshops with nearly 50 culturally and linguistically diverse community and faith leaders, practical recommendations for improvements to the energy system were co-designed and ECA and SCF then shared these with governments and market bodies through a series of well attended webinars and direct advocacy.

The process was very successful, enabling ECA to effectively learn from, and engage with, CALD energy consumers and amplify their voices to decision-makers. We have shared the resulting Insights Report, the process and the lessons with governments, industry, and other consumer organisations, many of whom plan to replicate it in their own work.

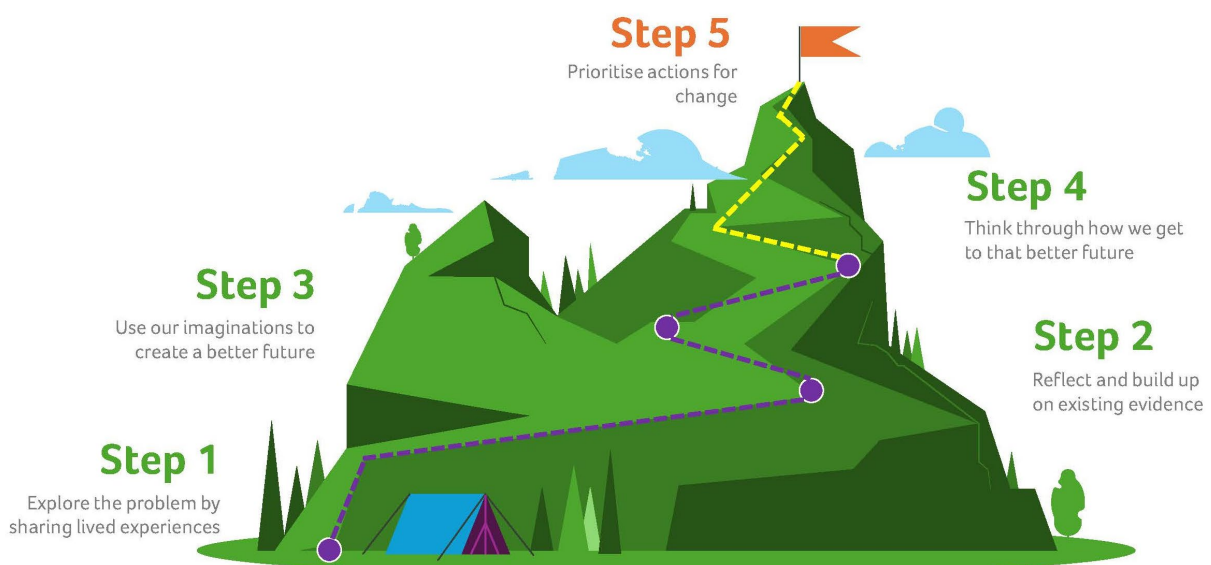


Figure 5: Insights Report - Understanding the diversity of consumers and their experiences of the energy system - Culturally and Linguistically Diverse Consumers Edition, April 2024



Above: Deep Dive workshop participants



FEATURED GRANT CASE STUDY

ECA Influence Grant: Victorian Council of Social Services (VCOSS): Ending the damaging energy hardship-health nexus

There is a well-established link between household energy hardship and poor health. Energy hardship – when individuals or households are unable to obtain and afford adequate energy services to support their wellbeing – can make you sick, further fuelling energy hardship.

While a rich body of research has examined the drivers of and measures to break this dangerous cycle, the energy market (governments, regulators and other statutory bodies, and retailers) has not effectively leveraged the capacity of the wider health system to break the link between energy hardship and poor health.

Through this ECA-funded project, VCOSS is seeking to establish new connections between the energy market and health system actors, so that those households who are experiencing ongoing energy-and-health hardship are identified earlier and supported better.

VCOSS launched a Provocations Paper at a public forum in April 2024 and Phase 1 of the project will produce a health and energy systems map, as well as a literature review of relevant research, including analysis of knowledge translation strategies. This will build an understanding of promising energy consumer support models and other recommended retail market interventions and identify the influence and implementation gaps.

Although the project will focus specifically on Victoria, it will provide insights and a model for the other jurisdictions to follow.

5. Consumer agency

We empower households and small businesses to navigate the energy transformation challenge and play a key role in building consumer agency.

Key activities:

1. Consumer vox pops

Complementing our research work and consumer surveys, this year we produced a series of 'vox pop-style' videos on the streets of Sydney and Adelaide, enabling Australian householders and small businesses to share their views directly on a range of energy issues. We share these videos across all our digital platforms, but especially on our LinkedIn page, where we have a high following among policymakers and decisionmakers, enabling them to get a regular 'litmus test' of consumer sentiment on energy.



Above: Staff member, Rebekah Thielemans, interviewed consumers on the streets of Adelaide to hear their views about energy

2. Social media content for consumers

We have produced a series of explainer videos about the energy transition and video case studies of diverse households and small businesses who have managed to go all-electric. We post these on our YouTube and Meta accounts, where we have more of a following from consumers. The videos complement the information we provide for households and small businesses in our Consumer Advice Hub on the ECA website, enabling consumers to find the information they want on the platforms they prefer.

3. Advocating for consumer needs in the media

ECA's executive team were mentioned in more than 2000 media articles, interviews and broadcast items during 2023-24, talking about ECA's work, the issues of energy affordability, pricing and tariffs, and how consumers can reduce their consumption and bills. Data from our consumer surveys and research is regularly quoted in the media and we frequently provide background information for journalists to help them produce content about consumer energy issues, such as explainer pieces on complex topics such as time-of-use tariffs.

In 2023-24, we also worked closely with some of our grant recipients to support them in attracting and capitalising on media interest in their research projects. We plan to continue doing this as much as we can in FY2025.

4. Foresighting Forum 2024

ECA's flagship two-day event, the Foresighting Forum, was sold out this year, with recorded sessions uploaded to our website continuing to attract views.



Above: The ECA team at Foresighting Forum 2024

5. Energy Ready Toolkit

As part of a Collaboration Grant with UTS ISF, Community Power Agency and Parallel Lines, ECA funded the Energy Ready Toolkit, a publicly available resource to help communities build resilience and be prepared to act if their power goes out. Further information about this is provided in the Featured Grant case study below.



KEY IMPACTS

- In 2023-24, ECA experimented with small paid social media campaigns to reach consumers with useful content about the energy transition. One video (produced for a very small budget) about experiences of householders and small businesses switching to induction cooking and aimed at people who might be making decisions about kitchen appliances was watched through to the end 45,000 times on Meta, proving there is demand for this kind of accessible information from consumers.
- Our advocacy for One Stop Shops for consumer energy information and support in Australia, including our discussions on the issue at the Foresighting Forum event, has led to the issue being elevated to the national level and many jurisdictions are currently considering what this could look like for consumers in their state / territory or local government area.
- We saw a strong increase in our social media following in the second part of the year. The engagement rates for our social media and newsletter are considerably above the sector average. We have also increased the number and range of platforms we use and we are building a consumer following on Threads.

Informing and engaging – consumer experiences of getting off gas

Telling interesting and relatable stories specific to stakeholders or consumers through digital content has continued to be one of the most effective parts of our communications strategy.

In 2023-24 we arranged with the local council and community in Esperance, WA to document their experiences of being the first town in Australia to transition away from the gas network. We conducted interviews with residents, local government representatives, tradespeople involved in the transition and with the energy provider, Horizon Power, to produce a series of videos about the lessons from the project.



Above: Household energy consumers in Esperance, WA

Energising Australians

The 2024 Foresighting Forum, hosted at the Aerial UTS Function Centre in Sydney on February 14 and 15, brought together consumer advocates with representatives from government and industry, to consider how we can deliver an energy system that benefits everyone. This year's sell-out event was the biggest on record, with a record 208 people attending.

The program featured keynote speakers Audrey Zibelman (Zibelman Energy Advisors) and Michael Colgrove (Energy Trust of Oregon), who gave an address on the Energy Trust of Oregon, which has been a One Stop Shop helping people in Oregon and Southwest Washington save money by implementing clean energy solutions since 2002.

A nonprofit funded through customer utility bills, its extensive array of services includes technical assistance, including advice and support, for those embarking on projects or upgrades, and an on-the-ground network of vetted and approved contractors. It also delivers cash incentives for individuals and businesses who invest in energy-efficient upgrades, renewable energy systems, grid-connected technologies, and feasibility studies.

So far, more than 800,000 sites have been transformed into energy-efficient homes and businesses, and consumers have saved US\$10.6 billion on their energy bills. The address sparked significant discussion, including how such a One Stop Shop could be replicated here in Australia.



FEATURED GRANT CASE STUDY

ECA Collaboration Grant: UTS ISF, Community Power Agency and Parallel Lines - Energy Ready Toolkit

We funded the Energy Ready Toolkit, a publicly available resource to help communities build resilience and be prepared to act if their power goes out.

The increasing prevalence of extreme weather events, including bushfires and floods, has put the spotlight on the need to build resilient communities. The consequences of loss of power in these events, often for long periods, have been a significant barrier to communication, safety, wellbeing, and recovery, adding to the economic loss felt by residents and small businesses. Over the last few years, ECA has provided several grants aimed at ensuring communities are supported to prepare, withstand, recover, and thrive after severe weather events and other hazards.

The latest of these grants is the Energy Ready Toolkit project, which aims to help communities understand the risks of outages, and to prepare and act if their power goes out. It also provides advice to local organisations and governments about effective engagement and includes a 7-step plan to be more energy resilient. Launched in December 2023, it is the result of a year-long process of research and consultation, funded as an ECA Collaboration Grant, and delivered in partnership with the University of Technology Sydney's Institute for Sustainable Futures (ISF), Community Power Agency and Parallel Lines.

Informed by a series of workshops in Mullumbimby, Lake Macquarie, Gympie, Magnetic Island, Bonang and Mornington Peninsula – all disaster-impacted regions – the toolkit contains a guidebook for activities communities can undertake to examine the risks they face, identify shared priorities, and develop a plan of action tailored to their unique needs and values.



Above: The Energy Ready Toolkit, funded by an ECA grant, helps communities to build resilience in the face of extreme weather events.

The toolkit has attracted substantial interest in 2024 from community groups across Australia (and internationally) as well as government agencies, regulators and local councils. Over 80 toolkits (physical copies) have been shipped, mostly to community energy groups and local councils, and the electronic version has been downloaded more than 250 times and shared widely. It was also cited by the Victorian Government in its interim report on the Network Outage Review 2024 as a valuable household and community planning resource.

In September 2024, the toolkit was awarded an Australian Good Design Award for demonstrating the critical role design plays in creating a better, safer, and more prosperous future.

Organisational goal: a high performing organisation

Our people and organisation

Ensuring we attract and retain the right people, and have the resources we need to deliver on our impact areas and priorities has been, and will continue to be, one of the priorities – and primary challenges – for ECA, as it is for most organisations.

Reporting to the Chief Executive Officer, our Executive Leadership team is responsible for executing our work plan, including leading our policy advocacy supported by our research, investing in the advocacy capabilities of other organisations through our grants, engagement with stakeholders, and the effective day-to-day management of our organisation.

Long time CEO Lynne Gallagher left ECA in May 2023, with Jacqueline Crawshaw performing the role of Interim CEO until ECA's new CEO Brendan French commenced at the end of September. We thank Lynne and Jacqueline for their leadership and ongoing commitment to better outcomes for consumers.

Longstanding Board Chair, Louise Sylvan also ended her term during this financial year, with new Chair Michael Schaper chairing his first Board meeting in March 2024. Louise's steady hand was instrumental in the success of ECA in its first 9 years and we thank her for her service.

Participating in forums and reference groups

In the course of their work, ECA staff participate in a range of jurisdictional forums and reference groups, which enable us to advocate directly to governments and industry on behalf of consumers, including:

- ACCC Consumer Consultative Committee
- ACT Energy Consumer Policy Consortium
- AEMC Consumer Strategy Group meeting
- AEMO Finance Consultation Committee
- AGL Customer Council
- Australian Small Business and Family Enterprise Ombudsman (ASBFEO) Policy Forums
- Energy Charter End User Consultative Group
- Energy Queensland Customer and Community Council
- Jemena Gas Networks Expert Panel
- Living Labs Advisory Committee
- NatHERS Stakeholder Consultative Group
- New Energy Tech Code Council
- NSW Electricity Supply and Reliability Expert Panel

- NSW Energy Consumer Reference Group
- NSW Energy Infrastructure Roadmap Consumer Reference Group
- NSW Renewable Energy Sector Board
- Origin Consumer Advocacy Panel
- QLD Ministerial Energy Council
- Residential Energy Efficiency Disclosure Initiative Governance Forum
- Residential Energy Efficiency Scorecard Project Advisory Group
- TransGrid Advisory Council
- Telstra CEO Roundtable
- Victoria's Energy Consumer Insights Forum
- WA's Advocates for Consumers of Energy Forum

ECA's CEO also participates in Energy and Climate Change Ministerial Council meetings.

Highly competitive grants program

Our Grants Program continues to evolve to support our strategic priorities.

We approved \$2.04 million in total funding for grants during the financial year.

Further details on the 2023-24 Grants Program are contained in the accompanying Grants Supplement.

2024-25 Independent Review of ECA

ECA will undergo an independent review in FY2024-25, which is a requirement as set out by the Energy and Climate Change Ministerial Council (formerly the Council of Australian Governments Energy Council). This review will assess ECA's effectiveness against its intended purpose. We look forward to participating and to receiving the findings.

Our Board

Energy Consumers Australia has a five-member Board, appointed by the Energy and Climate Change Ministerial Council (comprising the Commonwealth, State, and Territory Ministers with portfolio responsibility for energy).

The Board has three core functions:

- Setting the strategic direction and risk appetite of Energy Consumers Australia and engaging with stakeholders.
- Determining the funding and requirements of the Grants Program and being the decision-maker on applications other than those delegated to the Chief Executive Officer.
- Overseeing Energy Consumers Australia's performance and financial management, with annual accountability to the members.

As previously mentioned, a major change to ECA's Board make-up in 2023-24 was the commencement of the new Chair in March 2024. The previous Chair, Louise Sylvan, ended her term in February 2023, but continued in the role on a casual basis to assist an orderly transition.

Our Board members' full profiles are available on our website.



Dr Michael Schaper FAICD

Chair, Energy Consumers Australia

Michael is an experienced company director, with extensive experience in the consumer advocacy and small business arenas. He is Chair of the Federal Government's Shadow Economy Advisory Forum, and the Energy & Water Ombudsman of WA, as well as a member of the national board of the Australian Institute of Company Directors. He is also a member of the board of the Small Business Development Corporation of WA and the University of Canberra Council.

Michael was previously Deputy Chair of the Australian Competition and Consumer Commission (ACCC) and the ACT Small Business Commissioner. He is an Adjunct Professor at Curtin University, and a member of the Zero Emissions Enterprise Network based at Oxford University.



Gavin Duffy

Director, Energy Consumers Australia

Gavin has significant consumer advocacy and energy policy experience. Gavin is National Director Energy Policy and Research at St Vincent de Paul Society, Victoria. He has worked as a consumer representative in the energy sector for over 30 years undertaking research and policy evaluation on its impacts on domestic consumers. Gavin is currently a consumer representative of several government and industry committees, including the Australian Energy Regulator and the Essential Services Commission. Gavin is a member of the 2024 ISP - AEMO Advisory Council on Social License and a member of the Consumer Reference Group of NSW renewable energy roadmap and was awarded the 2001 Centenary Medal for services to the community.



Dr Helen Garnett PSM, FTSE, FAICD

Director, Energy Consumers Australia

Helen has significant corporate experience gained through directorships on government entities and ASX-listed companies in the energy, mining, agriculture, and education sectors as well as entities involved in regional economic development and the arts. She currently chairs Generator Property Management and is a director of Developing East Arnhem Land, The Crawford Fund, Becquerel Laboratories, and Larrakia Development Corporation. Helen is also a member of our Risk and Audit Committee and Chairs our Reference Committee.



Virginia Hickey FAICD

Director, Energy Consumers Australia

Virginia is a lawyer and corporate governance expert. She was previously a partner of commercial law firm, Finlaysons. She has significant experience in national regulatory environments through her previous governance positions as a National Competition Councillor, a National Transport Commissioner, and the Independent Chair of the Telecommunications Ombudsman Council. Virginia also Chairs our Reference Committee. Virginia's term will conclude on 31 July 2024.



Chris Spangaro GAICD

Director, Energy Consumers Australia

Chris has a background in law and public policy. He is a member of Independent Pricing and Regulatory Tribunal's (IPART) Energy Savings Scheme Tribunal Committee. Chris is a former senior director of the Australian Energy Market Commission (AEMC) where he led the Retail and Wholesale Markets team addressing key aspects of consumer energy pricing and protection as well as the reshaping of wholesale market rules. He previously worked for the NSW Independent Pricing and Regulatory Tribunal as General Manager of the Greenhouse Gas Abatement Scheme and as Manager, Water Pricing. Chris is also a member of our Risk and Audit Committee.

Our Reference Committee

The ECA Board has a Risk and Audit Sub-Committee and a Reference Committee. The role of the Reference Committee, as set out in the Constitution, is to act as an advisory group to the Board on energy consumer issues and is chaired by a member of the Board.

Our Reference Committee underpins our close engagement with other advocates in the sector and now has an oversight role with annual feedback from advocates on our effectiveness.

Six new members – Dr Andrew Nance, Jonathan Kneebone, Caitlin Perry (our first NT-based representative), Asha Ramzan, Ciara Sterling and Damian Sullivan – joined following reconstitution of the Committee in July 2023. ECA would like to thank previous members of the committee for their contributions, including Georgina Davis, James Colbert, Justine Jarvinen, and Gabrielle Sycamore.

The current membership of ECA's Reference Committee is as follows: Geoff Buchanan (ACT), Professor Neil Horrocks (QLD), Jonathan Kneebone (VIC), Simon Moore (NSW), Dr Andrew Nance (SA), Caitlin Perry (NT), Asha Ramzan (NSW), Dr Fiona Simon (VIC), Ciara Sterling (VIC), Damian Sullivan (VIC), and Dr Phillipa Watson (Tasmania). Their biographies are on our website.

Financial Performance Summary

Year Ending 30 June	2024	2023
Statement of Comprehensive Income		
Industry Levies		
AEMO Levies	9,278,710	8,442,866
Other Income		
Interest Earned	143,271	65,629
ACT Grant	25,000	25,000
Foresighting Forum	156,820	115,565
Other Income	18,784	3,624
Total Revenue	9,622,586	8,652,684
Grants	2,597,521	2,111,172
Research & Engagement	1,496,226	1,582,683
Administration Expenses	1,504,001	1,242,311
Staff Expenses	4,077,698	3,510,561
Board & Reference Committee	266,761	226,389
Total Expenses	9,942,207	8,673,116
Income Tax Expense	-	-
Net Surplus/(Deficit)	(319,621)	(20,433)
Statement of Financial Position		
Current Assets	2,707,941	2,503,630
Non-Current Assets	972,239	1,254,921
Current Liabilities	1,267,607	825,621
Non-Current Liabilities	438,058	638,794
Equity & Reserves	1,974,515	2,294,136
Statement of Cash Flow		
Cash Outflow from Operating Activities	(10,307,012)	(9,684,277)
Cash Outflows from Investing Activities	(64,164)	(730,572)
Cash Outflows from Financing Activities	(213,800)	(195,194)
Cash Inflow from Operating Activities	10,781,846	9,705,946
Cash at Beginning	741,538	1,645,635
Cash at End	938,408	741,538

**The national voice for
residential and small business
energy consumers**

**20
24**



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