

CONSUMER PRIORITIES

CONSUMER PRIORITIES FOR ENERGY MARKET DEVELOPMENT

AUSTRALIAN ENERGY MARKET COMMISSION

Inquiries

Australian Energy Market Commission

PO Box A2449

Sydney South NSW 1235

E: aemc@aemc.gov.au

T: (02) 8296 7800

F: (02) 8296 7899

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About the AEMC

The AEMC reports to the Council of Australian Governments (COAG) through the COAG Energy Council. We have two functions. We make and amend the national electricity, gas and energy retail rules and conduct independent reviews for the COAG Energy Council.

Executive Summary

The Australian Energy Market Commission's objective is to promote efficient, reliable and secure market frameworks for energy services which serve the long-term interests of consumers.

Our Strategic Priorities reflect that objective. The first of these priorities, identified in 2013, is our consumer priority, which aims to empower households, businesses and industry to participate confidently in all parts of the energy supply chain where they desire to do so.

As we pursue an ambitious reform program focussed on the long-term interests of consumer, it is critical we continue to deepen our consumer engagement, outside of the normal rule specific consultation.

As part of this, in May 2014 we held our first Consumer Priorities Forum to extend our relationships with consumer groups. This report presents outcomes from that forum.

Issues concerning vulnerable consumers and energy prices were highlighted prominently, including:

- Rising electricity prices, energy affordability and disconnections;
- Provision and accessibility of tools to help vulnerable groups and the need for a review of the concessions framework;
- Retailer engagement and contact with vulnerable customers; and
- Tariff reform.

Forum participants also focussed on the need for increased customer engagement, particularly with energy service providers. Overall, participants identified two major obstacles to effective engagement between consumers and service providers: complexity and transparency of retail offers and low level of consumer energy literacy.

Participants also sought more engagement with the AEMC on strategic energy market development issues. They also felt market development would benefit from better strategic engagement and coordination between government agencies and regulatory authorities.

Issues raised in relation to gas overlapped with broader discussions about price and vulnerable customers, particularly in the context of expected gas price increases with the establishment of an eastern coast gas market. There was also a view that gas market development required stronger leadership and was not as advanced as electricity market development.

And finally, changes to technologies and market arrangements are adding another layer of complexity for consumers. While forum participants saw potential value in

technological progress for consumers, a risk was identified that some consumers may be left behind without sufficient support.

Outcomes

Key action items put forward by the Commission in response to the issues raised by consumer advocates are summarised below. Where issues raised by consumer advocates sit outside the scope of the Commission's work, those matters will be referred to the appropriate government agency where appropriate.

- *Vulnerable consumers and rising energy prices*

Following the May forum, the AEMC received a letter from the members of the National Consumer Roundtable on Energy, requesting that the AEMC undertake a review of state and territory energy concessions. A review of the concessions framework is not within the AEMC's mandate. However, the AEMC has provided COAG Energy Council officials with a copy of the Roundtable's letter.

- *Customer engagement with service providers*

The Australian Energy Regulator has indicated it is redeveloping the Energy Made Easy website to improve clarity of information and ease of use. The AER is also considering a review of its Retail Pricing Information guideline to improve information disclosure and further support informed decision making by customers and has suggested it could review its compliance monitoring of retailers.

- *Consumer engagement with the AEMC*

The AEMC will continue to engage with consumer representatives on a project-by-project basis. We will also explore how we can work productively with consumers in a more general sense, to maximise the value of what we each bring to the broader energy market conversation. This will require consideration of matters such as:

- The most efficient and effective way for the AEMC to communicate information about the nature and timing its projects;
- The most effective means for the AEMC to provide assistance to consumer representatives that wish to become involved in, for example, a rule change process. We are seeking feedback on whether an AEMC consumer key contact would assist in navigating through regulatory issues.

The AEMC is considering alternative options to face-to-face meeting such as these forums, to accommodate for cost and resource issues. One option is to run future forums and meetings as webinars which would allow for different levels of technology and greater participation.

- *New technologies*

The AEMC has commenced work on a technology work program. This is focussed on improving our awareness in relation to technological change, and the potential for this change to impact on participants and the regulatory framework. The Commission intends to involve consumer groups and other market participants in various components of this work.

- *Coordination between government agencies*

The AEMC will distribute this report to other jurisdictional and regulatory leaders. The AEMC will also seek to actively identify areas of overlap and co-ordinate its activities with other jurisdictional and regulatory bodies where this is feasible.

- *Gas*

The AEMC will continue to work with the COAG Energy Council, jurisdictions, the Australian Energy Market Operator, Australian Energy Regulator, industry stakeholders and consumer groups to develop an integrated plan to support the future development of Australia's gas markets. The COAG Energy Council has tasked the AEMC to review the design, function and roles of facilitated gas markets and gas transportation arrangements. The AEMC was asked to provide a report to the first Council meeting in 2015 for actions that can be implemented to strengthen the structure and competitiveness of the east coast gas market.

Contents

Introduction.....	1
PART ONE: Online survey results	2
PART TWO: Consumer engagement forum	5
PART THREE: Breakout sessions	7
PART FOUR: Where to from here?	16
Appendices	
A Current Power of choice projects and timetable - December 2014	22
B Research approach	23
C Forum Agenda	24
D List of forum participant.....	25
E Ranking order all issues	28
F Survey questions.....	29

Introduction

In 2013, the AEMC released its second *Strategic Priorities for Energy Market Development* report, which establishes the overarching objectives for the Commission's work program focussed on addressing long-term consumer interests.

A key priority identified in that report was to strengthen consumer participation and continue to promote competitive retail markets, enabling consumers to confidently participate in all parts of the energy supply chain.

To help meet this priority we have committed to more regular and direct engagement with consumers and their representatives about:

- specific concerns of residential and small business consumers in relation to energy market developments; and
- the impact of particular developments on consumers.

The AEMC's first Consumer Priorities Forum was held in Melbourne in May.

Prior to the forum an online survey was carried out to help guide discussion at the forum. Survey respondents ranked issues of importance to them, such as the impact of rising electricity prices, consumer protections and consumer engagement. This helped the AEMC to prepare for the forum and to guide discussion on the day.

The forum was attended by participants representing a range of consumer interests from across the National Electricity Market states with organisations representing household consumers including low income and disadvantaged consumers, the most strongly represented.

A second forum, to be held in February 2015, will further explore issues identified in this report and provide feedback about actions the AEMC can take in relation to those issues.

The feedback gained through this process will be incorporated into the strategic priorities process that the AEMC conducts bi-annually as well as the Commission's day to day work, including rule changes, market reviews and other advice to government.

These forums aim to continue and strengthen the ongoing dialogue between the AEMC and energy market consumers and their representatives.

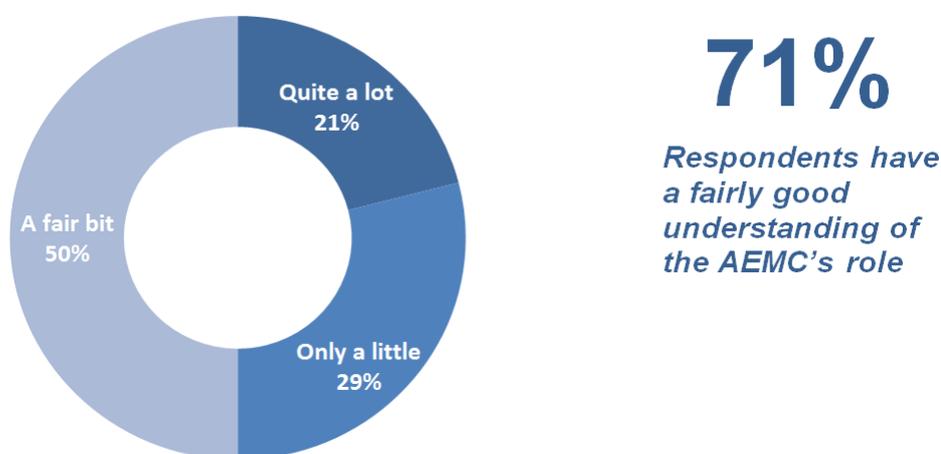
It is an opportunity for the AEMC to gain a greater understanding of consumer issues and for consumers and their advocates to understand the role and work of the AEMC.

PART ONE: Online survey results

An online survey was carried out prior to the forum, which asked participants to describe their level of knowledge about the role of the AEMC and to prioritise issues to be discussed at the forum.

Most of the 38 consumer representatives surveyed felt they had a fairly strong understanding of the roles and responsibilities of the AEMC – 71 per cent had ‘a fair bit’ or ‘quite a lot’ of understanding (Figure 1).

Figure 1 Survey respondents understanding of the role and responsibilities of the AEMC



When respondents were asked to write down the issues most important to them, high priority issues related to (i) assisting vulnerable customers deal with rising energy prices, (ii) increasing consumer engagement, and (iii) strategic planning for the future. Table 1 provides more detail about the issues participants identified.

Table 1: Top of mind issues for survey respondents

Top of Mind Issues	
Assist vulnerable customers deal with rising energy price	— Providing adequate assistance to help vulnerable customers pay their energy bills and avoid disconnection
	— Promoting awareness of the availability of assistance program
	— Ensuring vulnerable customers are treated with respect
	— Ensuring tariff structures meet the needs of vulnerable customers
	— A consistent approach to energy concessions across state governments
	— Explaining what consumers can do to keep energy prices down

Top of Mind Issues	
	— Encouraging investment in energy efficient appliances by tenants and state housing authorities
Increase consumer engagement	— Helping equip consumers to make more informed decisions around choice of retailer, plan and contract to ensure they benefit from competition
	— Reducing complexity and improving market transparency for small consumers
	— Increasing consumer trust in energy markets
	— Addressing issues around implementation of the Power of Choice reforms
Strategic planning for the Future	— Developing a national long term market outlook that anticipates evolving trends, technologies and market developments which require regulatory change and is flexible enough to respond in a timely manner
	— Considering the impact of rising gas prices and the potential transition from gas to electricity
	— Supporting production of renewable energy
	— Making demand management more attractive than network augmentation
Mid-level issues	— Considering how network tariffs can be developed to improve cost reflectivity and remove cross subsidies between consumer groups
	— Improving forecasting of energy consumption
	— The effectiveness of competition in delivering cheaper high quality services
	— Fine-tuning reliability settings and standards
	— Helping consumers become more energy efficient
	— Ensuring governments work together in the best interest of consumers and to eliminate inequalities
	— Ensuring regulatory and policy processes are informed by feedback from consumers of differing capabilities including ordinary and vulnerable consumers

Participants were then asked to read five sets of issues and rate the relative importance of these from most important (1) to least important (5). These issues were determined by an AEMC working group based on stakeholder engagement and feedback gained as part of the AEMC's recent rule changes and reviews. The issues were also tested with members of the National Consumer Roundtable on Energy. The results are summarised in Table 2.

Table 2: Ranking of five sets of issues presented to survey respondents

Issue	Average ranking score
Impact of rising electricity prices	1.8
Consumer protections	2.6
Current regulatory arrangements	3.2
Improving consumer engagement	3.5
Issues relating to retail gas	3.9

The impact of rising electricity prices was clearly the highest ranked issue for discussion according to the survey respondents, followed closely by consumer protections. Current regulatory arrangements and improving consumer engagement were also regarded as important. Issues relating to retail gas were ranked lower than the other four sets of issues.

Finally, a more detailed survey was carried out which unpacked these five 'sets of issues' into 30 more specific issues. Survey respondents were asked to rank these issues from 0-10, where zero is not all that important, five is fairly important and ten is extremely important. This gave respondents an opportunity to be more specific about the issues they felt should be discussed at the forum.

The results were broadly consistent with the previous exercise and all 30 issues raised were regarded by respondents as important, with none ranked under five. The top ten issues, ranked 8.5 out of 10 or above all related to rising energy prices; consumer engagement – particularly ensuring consumers have full information about contracts and offers from energy providers; and consumer protections – particularly those related to vulnerable consumers.

Figure 2 Top ten issues ranked by survey respondents

1	Ability of consumer to understand energy offers and choose a plan to suit their needs
2	Clarity in energy contracts/advertising & ensuring consumers fully understand contract terms
3	Increases in gas prices particularly where consumers have little ability to alter usage
4	Ability of consumers to understand and respond to new flexible pricing structures
5	Consumer protections for vulnerable consumers that are supplied by energy resellers
6	Rising debt levels/ Concerns about debt policies & other debt collection issues
7	Need to review energy concessions to ensure they are up-to-date & targeted
8	The high level of disconnections
9	Extent to which some consumers are not currently engaged in the retail market
10	Price deregulation and if consumer protections are adequate in deregulated markets

Most issues relating to current regulatory arrangements and gas ranked slightly lower than other issues, although increasing gas prices was elevated to the third highest ranked issue. A full list of issues, in order of rating by respondents is at Appendix E.

PART TWO: Consumer engagement forum

The forum was attended by participants representing a range of consumer interests from across the states within the National Electricity Market (NEM). These organisations are identified in Table 4 below, classified by the broad class of customers represented by each. The table also identifies the jurisdiction in which each organisation is based.

Table 4: Consumer groups represented at the forum, by consumer class

Consumer class	Organisation	Jurisdiction
Households including low income and disadvantaged	Energy And Water Ombudsmen of NSW (EWON) and Victoria (EWOV)	NSW, Victoria
	Councils of Social Services : NSW (NCOSS), Victoria (VCOSS), South Australia (SACOSS), Tasmania (TASCOSS) and Queensland (QCOSS)	NSW, Victoria, SA, Tasmania and Queensland
	Brotherhood of St. Laurence St Vincent de Paul	
	Ethnic Communities Council NSW	National
	Public Interest Advocacy Centre (PIAC)	NSW
	Financial and Consumer Rights Council	NSW
	Consumer Action Law Centre (CALC)	Victoria
	Consumer Utilities Advocacy Centre (CUAC)	Victoria
	Kildonan Uniting Care	Victoria
	Anglicare SA	Victoria
	Uniting Communities	SA
Business	Australian Industry Group (AIG)	National
	Council of Small Business of Australia	National
	Shopping Centre Council of Australia	National

Consumer class	Organisation	Jurisdiction
	Business SA	SA
Environmental, EE and alternative technologies	Moreland Energy Foundation	Victoria
	Alternative Technology Association	National
Other	Consumer Advocacy Panel	National

The forum started with presentations from a number of consumer representatives, including the South Australian Council of Social Services, St Vincent de Paul Society and Consumer Utilities Advocacy Centre in Victoria on the strategic consumer priorities for these organisations.

Forum participants were then split into four breakout groups, facilitated by an AEMC representative or consultant and attended by an AEMC Commissioner or Senior Director. The Commissioners and staff moved around each group to ensure all participants were able to communicate directly with senior AEMC representatives.

There were three breakout sessions which reflected the priorities identified in the online survey and other issues identified by the AEMC. Participants spent the first session discussing vulnerable customers and rising energy prices. The second involved discussion about increasing consumer engagement. The third session gave participants the opportunity to choose between the following topics:

- Gas issues
- New technology and changing energy demand;
- Coordination between government energy agencies and market institutions

consumers. One participant felt the number of vulnerable customers is likely to increase as minimum wages are squeezed in the current economic landscape. Another expressed a view that prices were the single biggest issue for small businesses.

Several participants identified price certainty as necessary for budgeting purposes and, conversely, that the exercise of budgeting is made more difficult when prices are perceived to be, or are, regularly changing.

It was agreed there was a general lack of understanding about contracts, including the various costs which are incorporated into the final energy bill.

One participant suggested the benefit of regulated prices is a minimum level of protection, such as a regulated price, for customers who wishing to remain on their existing contracts. Others, however, were interested in flexible pricing and how this could impact consumers.

Some anticipated an increasing number of billing complaints, with rising debt levels and disconnections. Complaints about debt collection were also a concern

One participant believed more retailers were threatening disconnection before going through required processes, such as fully explaining the consumer's situation, their options and rights.

Provision and accessibility of tools to help vulnerable groups, including the concessions framework

Participants expressed concerns about the lack of tools available to support vulnerable consumers. They also felt the tools that were available were not always useful or accessible. Participants offered several examples, such as:

- Hardship programs requiring too much debt before a consumers qualifies;
- Payment plans not working because a customer's income is too low and can't maintain the payments,
- Prepayment meters not delivering the intended outcome as people still cannot afford to pay, and
- Energy efficiency programs not operating effectively for vulnerable customers unable to afford more efficient appliances.

One participant suggested introducing a low interest loan programme to allow more efficient appliances to be bought.

Issues which further contributed to the accessibility of tools and programs included quality of public housing infrastructure and insulation.

2 Issues relating specifically to gas are referred to later in this document.

The timing of access to tools was also identified as an issue. One participant explained that customers become vulnerable for a number of external or personal reasons and early access to support and tools is more useful before they fall into the 'vulnerable' category. In other words, early intervention can prevent a consumer from sliding further into energy poverty.

There was also a perceived lack of awareness about tools and programs that are available. For example, participants felt many consumers were not aware of their entitlement to rebates and that retailers are sometimes reluctant to provide this information. A number of people commented that retailers should be obliged to provide this information. A comparison was made with the obligation on Telstra to advise customers when they are approaching their limits on mobile phone usage. Another suggested that retailer billing systems should identify customers that are falling behind their payments, allowing for those accounts to be flagged and monitored.

A review of the different concessions available across states and territories was proposed. While it was not clear that participants thought all states and territories should have the same arrangements, given the need to account for jurisdictional variations, one participant suggested best practice principles might be useful.

Retailer engagement and contact with vulnerable customers

While one participant acknowledged that retailers generally had a lot of regulatory obligations imposed on them, there was general consensus among others that there is room for improvement in the provision of services by retailers.

It was suggested some retailers were providing customers with incorrect information about eligibility for hardship assistance, such as the need to go to a financial councillor, or referring people to programs that were unsuitable.

One participant cited feedback provided to their organisations indicating that customers might not have access tools to manage their situation because information is not being provided to them. This participant suggested that unless you use the word "hardship" you are not put through to the hardship team. It was suggested that training was required to ensure more consistent and accurate information was provided to vulnerable customers by retailers.

Another participant stated that retailers tended to be overly aggressive in dealing with potentially vulnerable people, making it difficult for these customers to get through to the relevant team until they 'prove' their tough financial position. This was backed up by comments that many of the complaints dealt with by the ombudsmen could easily be resolved by talking to the right person in the retailer.

Another participant thought jurisdictional governments were "bolting on" additional requirements to improve retailers' practices in dealing with vulnerable people. One example given was the wrongful disconnection payment imposed on retailers, providing retailers with a financial incentive to ensure hardship is considered before

disconnecting services. Another example provided was the Home Energy Saver Scheme in Queensland and the benefits which flowed from that scheme, such as the identification of hardship, billing and access to concessions.

Participants were divided on how retailers generally managed the provision of services to vulnerable customers. One suggested the retail market was split between major retailers providing hardship programs, while the second tier retailers were shedding hardship customers because of the cost and risk involved. Conversely, another suggested smaller retailers had improved their practices, however lack the experience and resources of the larger retailers.

Participants also indicated that the billing process presented some issues of concern. One participant stated that it was wrong to suggest vulnerable customers were not willing to pay, but that they had to prioritise the order of their payments. This suggested that low-income consumers needed longer time to pay bills or more regular (monthly) billing cycles.

Participants also felt payment problems are exacerbated when retailers change their billing systems and don't have good change management systems in place.

Tariff reform

Several participants raised the need for tariff reform in the context of rectifying possible cross subsidisation between customers. For example, consumers may be cross subsidising high users of air conditioning or those that have installed solar photovoltaics. In these circumstances it was suggested that tariffs should be targeted at those that install such devices and have high usage during peak times.

B. Increasing customer engagement

Improving customer engagement was a clear priority for participants, although this did not necessarily mean the provision of more information. Instead, participants preferred clear, targeted communications, with a consistent approach. Too much information was considered to add to consumers' sense of confusion.

Two threads of discussion on customer engagement were identified:

- Day-to-day interactions and engagement between customers and service providers, and
- Strategic engagement between consumer advocates and government or regulatory bodies.

Engagement between customers and service providers

As an essential service, energy was regarded as unique because consumers cannot choose whether or not to engage an energy provider. A perceived consequence of this was that energy providers had the upper hand in negotiations which coloured the ongoing relationship between customer and service provider. One participant

commented that retailers were not 'on your side', leading to unease with the negotiation of initial contracts and ongoing services.

It was suggested that it was currently not possible to demonstrate that customers always benefit when they make a choice to switch provider. One participant said that customers who exercise their right to choose in a competitive market, often end up getting "burned" and don't switch again. Good deals can also end up becoming bad ones if, for example, prices change mid-contract.

One participant suggested that a regulated price would provide a safety net and help facilitate greater customer participation by removing the perceived risk of participation.

One participant referred to an existing program which involved training individuals on energy related matters in selected organisations which support consumers. This would raise the level competency of those individuals on energy issues and catalyse an ongoing supportive relationship between the organisation and the consumer. It was noted that this type of program is not currently operating in all states and territories.

Overall participants identified two major obstacles to effective engagement between consumers and service providers: complexity and transparency of offers and low level of consumer energy literacy.

Box 1: *Complexity and transparency of offers*

Comparability across market offers was considered low, and requires an ability to identify the key billing components in order to compare. However, because market offers are often presented differently by different companies, participants suggested offers were not easily comparable.

Participants felt there was a lack of transparent information compared with other products. For example, a fixed price does not always mean charges will not change.

While part of the problem is a lack of technical knowledge on the part of the consumer, participants also felt that the information made available is not always useful or easily understood (for example billing in \$/kWh).

Participants also noted that in the past, discounts were generally based on the regulated rate, but there is no longer any such rate and discounts are calculated differently. Consumers do not necessarily know to ask how the calculation is made and therefore may be misled (for example, if the discount only applies to the variable part of the bill).

One consumer representative suggested this issue could be overcome by standardised communications, which provide a comparison based on practical measures. Another suggestion was to regulate the comparability of the key variables in market offers.

Some participants commented that standardised measures and greater transparency, which supports consumer choice, was in the best interests of consumers and governments needed to play a role in this area.

Box 2: *Low levels of customer knowledge and energy literacy*

Customer knowledge about services, rights, obligations and available assistance was considered low. Improving the level of energy literacy is therefore considered by participants to be a key priority.

One example raised by several participants was the issue of discounting: previously all discounts applied to a regulated rate however, discounts are now applied to many different aspects of a bill and consumers may not be fully aware of this.

Participants agreed that part of the problem for consumers is the ability to interpret an energy bill and how to reduce costs. They felt consumers need support and education about energy and contractual concepts. While large customers could negotiate their own arrangements with suppliers, small customers had less power in the negotiation.

A survey carried out by one participant's organisation suggested that many small customers did not understand the different parts of a bill, and would look only at the total figure. This participant suggested the onus should be on retailers to itemise bills and show where customers can reduce their costs. This was consistent with the view of another participant who suggested energy suppliers needed to be made aware of the complexity of their contracts.

One participant suggested the lack of consumer engagement in the energy market disempowers individuals and results in lost opportunities to reduce their bill.

However, participants also recognised that different groups of consumers had different needs and that there was no single approach that should be taken to support all consumers. Resolution might require a multi-faceted strategy with different tools and targeted information. For example:

***Elderly consumers** need to be more engaged about their supply contracts but struggle with the complexity of the issues and tend to remain on standard contracts, changing providers only when they physically move house.*

***Tenants** may be unable to implement alternative options for supply or energy efficiency due to limited control over practical issues such as ability to change their home fit out.*

***Culturally and linguistically diverse groups** may need specialised training and relationship building.*

***Small businesses** may also have issues with engagement due to lack of time and resources. These groups do not know where to seek help. While large organisations have the resources to make their own arrangements, smaller businesses do not.*

There was generally positive acknowledgement by many participants of the AER's Energy Made Easy website, although some improvement was also suggested, such as access for consumers from culturally and linguistically diverse backgrounds.

Strategic engagement

Participants expressed an interest in understanding how they could be involved at a more strategic level with jurisdictional and national energy market developments. It was felt that business groups currently have a stronger voice on these issues than small consumers groups.

It was suggested that bodies like the AEMC need to look at easier ways for consumers to engage with a process that doesn't involve, for example, going to a website and downloading large and complex documents.

Participants thought it would be beneficial to give consumers the opportunity to be engaged on broad principles, even if it was not practical to engage all consumers in more complex details of proposed reforms and consultations. This would give more consumers an opportunity to have their voice heard and be involved in the process without being bogged down in technical detail.

For example, one participant said that consumers in their jurisdiction did not understand what "full retail contestability" meant, making it difficult to meaningfully engage with customers on this matter. The participant suggested it was important to engage with consumers on this issue, while also continuing to educate consumers on their rights, and the rights and obligations of retailers, under the new market framework.

Other tools available such as Energy Made Easy are often online and therefore require access to these facilities and a degree of computer literacy. A hotline service set up by the AER to help consumer groups with energy market issues is also viewed as being effective but not well known.

C. Gas issues

Participants focussed on rising gas prices and affordability, particularly for specific consumer groups and demographics, including:

- vulnerable customers, due to their capacity to make and effect decisions regarding their gas usage or the use of alternatives;
- low income households, where gas is used for heating and cooking and there is difficulty in reducing these activities in order to minimise the bill;
- regional customers, and
- business customers, in particular those who rely on gas as a feedstock and for whom there may be little alternative or substitute. Business customers are now finding they are not receiving sensible offers, and have less ability to negotiate forward contracts.

While there was seen to be room for improvement in competition in the retail gas market, participants also felt the way forward with gas is less clear than for electricity. This also made it difficult to know who to approach for policy or advocacy.

Participants considered gas matters being regarded as a “state issue” had led to a piecemeal approach to design across state and territories.

There was a general view that gas matters needed greater policy leadership, both in the short term and the long term. One participant suggested current policies promoting gas uptake for domestic users, needs rethinking. For example, in Victoria, gas continues to be promoted, through concessions to install gas heaters, as a cheaper option to electricity. However, participants felt the increased efficiency of electricity appliances and rising cost of gas meant this may no longer be the case.

D. New technologies and falling demand

Participants acknowledged technology was changing the energy market and adding a level of complexity. One participant suggested consumers previously had a single relationship (with the retailer) for all services and energy, whereas technology is diversifying the energy industry, meaning there are more relationships, with energy flowing in many different directions.

Participants anticipated there would be great value in these changes with increased opportunities for demand side participation and changes to pricing structures.

One participant suggested falling demand was linked to the greater uptake of technology and energy efficiency measures. Another participant noted that there was a particular issue for customers in understanding the relationship between how much they used and how much they paid in an environment of falling demand. This raised issues of how consumers would financially benefit from new technologies and how sunk network costs would be dealt with in the future.

Participants generally viewed energy efficiency as being important to managing costs, rather than dealing with broader environmental concerns. This is true for businesses and individuals, but particularly for vulnerable and low income households which may not be able to afford energy efficient technologies.

Another key issue with technological change for participants is the varying levels of education and understanding about the potential of these changes. It was considered important to ensure all consumers could benefit from change.

Participants wanted to be able to anticipate the nature of change and understand how consumers would be affected by it. Some suggested a review of the National Energy Customer Framework (NECF) might be appropriate, taking into account consumer protection in a changing market with, for example, flexible tariffs.

Participants were also concerned that customers are not left behind and that the market may evolve faster than regulation can handle, leading to negative impacts for

consumers. The continuing appropriateness and adequacy of customer protections in the face of market changes is therefore a key concern of participants.

E. Co-ordination between government agencies

There was a general concern about lack of coordination between government agencies across all breakout groups. This included lack of coordination between the NEM's central energy agencies, the AEMC, AEMO and the AER, and coordination between jurisdictional governments and their agencies, as well as between advocacy groups and these bodies.

It was acknowledged bodies were working together on some issues. For example the AER and AEMC had collaborated on distribution determinations, and the AER, the AEMC and AEMO worked together on metering and the smart meter rollout. However there were more examples of low levels of coordination. One participant commented that the result of all regulators being clear and respectful of their boundaries has been the creation of "islands".

In general, participants indicated that they want to be able to feed into the policy making process but duplication and lack of coordination across various agencies creates obstacles for consumer groups to engage. The participants requested governance bodies to better coordinate when seeking input from consumer groups.

In terms of engagement with jurisdictional governments, participants indicated this is complicated by governments making and implementing policy decisions without regard to the impact on the market. The feed-in tariff schemes were provided as an example.

Some participants pointed to a disconnect between new jurisdictional developments within the context of the NECF, with each jurisdiction seemingly applying the NECF differently.

Some participants thought the NECF framework was good in principle, but there were compliance issues and insufficient incentive for retailers to improve their performance.

While participants understood that the aim of the national market is to deliver the best outcomes for consumers in general, this didn't necessarily mean it would be the best outcome for individual consumers.

Concessions and hardship programmes were again identified as major areas of concern requiring more national, rather than jurisdictional, approaches.

PART FOUR: Where to from here?

Engagement with consumer representatives is an essential part of the AEMC's role. Taking on board some of the conversations from the May forum, we recognise that different stakeholders have differing viewpoints. Effective engagement with consumers and their representatives may therefore require some rethinking of our conventional models of engagement.

At our May forum, we sought to provide consumers with an opportunity to tell us what their top issues were. Within that context, we engaged in a broad range of dialogue, during which you outlined to us your most significant concerns.

An important starting point for the forum was that consumer representatives were free to raise any issues of concern, not only matters directly related to the functions of the AEMC.

The AEMC is an independent agency, responsible for making energy rules and providing expert advice to federal, state and territory governments. We carry out our functions to promote efficient, reliable and secure energy markets that serve the long-term interests of consumers.

Where issues raised by consumer advocates sit outside the scope of the Commission's work, those matters will be referred to the appropriate government agency which will be provided with a copy of this report. For example, it is outside the scope of the Commission to make policy and resource allocation decisions. These decisions sit with government departments.

The preceding section of this paper reflects the concerns raised in the May forum. In this section we outline what the Commission can do to address some of these issues.

Vulnerable customers and rising energy prices

Issues

- Rising energy prices, debt levels and disconnections were a concern for all customers, for both gas and electricity.
- The tools designed to assist vulnerable consumers do not always work as intended, and can create other issues for these customers.
- The current state based concessions frameworks should be to be reviewed by a national body with a view to promoting greater consistency.

Energy concessions and hardship payments for vulnerable customers are traditionally matters of social policy, determined and provided for by state and territory governments. As such they are not usually included within the AEMC's area of

responsibility. However in its *Power of choice* review,³ the AEMC made a recommendation that state governments should review their energy concession/rebate schemes so that they are appropriately targeted and can manage the potential transition to more flexible pricing. This recommendation was reiterated by the AEMC in its 2014 retail competition review.

Action items

Following the May forum, the AEMC received a letter from the members of the National Consumer Roundtable on Energy, requesting that the AEMC undertake a review of state and territory energy concessions. A review of the concessions framework is not within the AEMC's mandate. However, the AEMC has provided COAG Energy Council officials with a copy of the Roundtable's letter.

Customer engagement: Engagement between customers and service providers

Issues

- Improving customer engagement is a priority issue, but this means the provision of clear, targeted and consistent information rather than more information.
- Two major obstacles to effective engagement with consumers are: (1) the complexity and lack of transparency of offers, and (2) low levels of customer knowledge and energy literacy.

Consumer engagement in the energy market has been considered extensively by the AEMC in recent projects.⁴ Findings from research undertaken by the AEMC as part of these projects broadly support many of the comments made by participants in the May forum.

In its recent retail competition review,⁵ the Commission included a recommendation that jurisdictions consider options for raising awareness of the tools available for comparing energy offers to improve customer confidence in the market. It also recommended ways to improve how retail markets work including ensuring concession schemes are working properly, harmonising regulations across jurisdictions to reduce costs, and removing energy price regulation where competition is effective.

The AEMC published a consumer engagement blueprint in 2013⁶ that provided recommendations of relevance to all jurisdictions on how to increase the confidence of customers to shop around for a better deal. This included increasing awareness of

³ AEMC, *Power of choice* review – giving consumers options in the way they use electricity, final report, p.ii.

⁴ AEMC, *Review of competition in the retail electricity and gas markets in NSW*, final report, 31 October 2013; *Retail competition review*, final report, 22 August 2014.

⁵ AEMC, *Retail competition review*, final report, 22 August 2014, p.iv.

⁶ This was released as a supplementary report to the *Review of competition in the retail electricity and gas markets in NSW*, *ibid*.

existing information and tools, such as independent comparator websites, and making these tools user-friendly. The recommendations were made in the context of the NSW review, but are considered to have general application to other jurisdictions.

Action item

In a submission to the AEMC's draft determination for the *Retailer Price Variations in Market Retail Contracts* rule change request,⁷ the Australian Energy Regulator (AER) indicated it is redeveloping the Energy Made Easy website to improve clarity of information and ease of use.⁸

The AER has indicated that it could conduct a review of its *Retail pricing information* guideline in early 2015 to improve information disclosure and further support informed decision making by customers and has suggested it could also review its compliance monitoring of retailers.

Customer engagement: Engagement with the AEMC

Issue

- Bodies such as the AEMC need to look at easier ways for consumers to engage with its processes without having to download large and complex documents.

In order to provide stakeholders with a simple overview of our projects, all publications must be accompanied by plain English information sheet. We have also acknowledged the importance of consumer engagement in our processes by identifying it key priority in our *Strategic priorities for energy market development 2013* report.⁹

Action items

The AEMC will continue to engage with consumer representatives on a project-by-project basis. We will also explore how we can work productively with consumers in a more general sense, to maximise the value of what we each bring to the broader energy market conversation. This is anticipated to be an ongoing process and will require consideration of matters such as:

- The most efficient and effective way for the AEMC to communicate information about the nature and timing its projects;
- The most effective means for the AEMC to provide assistance to consumer representatives that wish to become involved in, for example, a rule change process. For example, would an AEMC key contact to assist in navigating through the regulatory issues be useful?

⁷ Australian Energy Market Commission, *Retailer Price Variations in Market Retail Contracts*, final determination, 23 October 2014.

⁸ Australian Energy Regulator, submission to the *Retailer Price Variations in Market Retail Contracts*, draft determination, 2 September 2014, p.3.

⁹ A copy of this document may be downloaded from <http://www.aemc.gov.au>

In terms of future engagement forums, the AEMC is considering alternative options to face-to-face meeting such as this one, to accommodate for cost and resource issues. One option is to run future forums and meetings as webinars¹⁰ which would allow for different levels of technology and, potentially, greater participation.

New technologies

Issue

- Changes to technologies and market arrangements are adding another layer of complexity for consumers. While there is potentially great value in technological progress for consumers, there is also a risk that many will get left behind and may be excluded from enjoying the benefits.

The AEMC acknowledged the need to ensure that market and regulatory arrangements facilitate consumer participation in the changing energy market in its *Power of choice* review.¹¹ At its core, the review recognised that changes to the market and to technologies are on the horizon, and sought to investigate how the market framework needs to adjust. The *Power of choice* reform program covers three key areas:

- Consumer information – consumers are able to make informed choices about the products and services that best suit their needs and circumstances;
- Tech savvy innovations – allowing the market to open up to new metering and technology options; and
- Network (poles and wires) reform – networks providing cost reflective prices which consumers can use to make decisions about how they consumer energy.

The list of projects derived from the *Power of choice* review, and the timetable for each project, is provided in the appendix. These projects will continue to review the roles, responsibilities and relationships between consumers, retailers, distribution network businesses and other parties involved in the provision of energy services. They will provide stakeholders with extended opportunities for engagement and input through the submission process as well as through stakeholder workshops.

Action items

We expect the above work to continue for some time: for consumers this should ultimately lead to greater choice in how they use energy, the services that they choose to use, suppliers and types of technology that are adopted. The AEMC has also commenced work on a technology work program. This is focussed on improving our awareness in relation to technological change, and the potential for this change to

¹⁰ A webinar is an online event hosted by an organization and broadcast to a select group of individuals via the Internet. It would allow for interaction and sharing of presentations or other multimedia content to participants in real time.

¹¹ AEMC, *Power of Choice - Stage 3 DSP Review*, final report, 30 November 2012.

impact on participants and the regulatory framework. The Commission intends to engage with consumers and other market participants on elements of this work.

Coordination between government agencies

Issue

- There is a lack of coordination between government energy agencies and between jurisdictional governments. This often creates an obstacle for participants wanting to engage with the policy making processes.

The AEMC attends regular meetings with the Australian Energy Regulator and the Australian Energy Market Operator to discuss work programmes and other issues at a strategic level. It also participates in a number of formal meetings with Federal and Jurisdictional leads throughout the year. We are working closely with both the AER and AEMO in identifying areas inter-linkages and in co-ordinating the development of our work programmes. This will facilitate the smooth and timely implementation of reforms.

Action items

To augment the ongoing co-ordination, and raise awareness for this is as a priority, the AEMC will distribute this report to other jurisdictional and regulatory leaders. The AEMC will also seek to actively identify areas of overlap and co-ordinate its activities with other jurisdictional and regulatory bodies where this is feasible.

Gas

Issue

- Development of the gas market has progressed in a piecemeal fashion across the states and territories making the way forward for resolving gas issues less clear than for electricity. Greater policy leadership is needed.

The AEMC completed a gas market scoping study in 2013¹² which provided an overview of the current state and changes in the east coast gas market. It confirmed the general view that market development, in particular recent market development, has occurred in a relatively fragmented and ad hoc manner, without a clear strategy for how the market can transition from its current relatively immature state to a more mature, fully functioning market.¹³

Action items

The AEMC will continue to work with the COAG Energy Council, jurisdictions, the Australian Energy Market Operator, Australian Energy Regulator, industry stakeholders and consumer groups to develop an integrated plan to support the future development of Australia's gas markets. The COAG Energy Council has tasked the

¹² See <http://www.aemc.gov.au>

¹³ K. Lowe Consulting, *Gas market scoping study – a report for the AEMC*, July 2013, p. ii.

AEMC to review the design, function and roles of facilitated gas markets and gas transportation arrangements. The AEMC was asked to provide a report to the first Council meeting in 2015 for actions that can be implemented to strengthen the structure and competitiveness of the east coast gas market.

We will consider the feasibility and practicality of a gas price trends report, similar to the electricity price trends report currently published.

A Current Power of choice projects and timetable – December 2014

AEMC rule changes	Status
Distribution network pricing arrangements.	Final determination published 27 November 2014.
Customer access to information about their energy consumption.	Final determination published 6 November 2014.
Competition in metering and related services.	Preparing draft determination. Final determination planned for July 2015.
AEMO obtaining better demand side participation information.	Draft determination published 18 December 2014.
Reform of demand management embedded generation incentive scheme.	Commenced. Expect consultation paper early 2015.
Embedded networks.	AEMO submitted rule change request October 2014.
Multiple trading relationships.	AEMO developing rule change request.
AEMC reviews	Status
Electricity customer switching.	Final report published 10 April 2014.
Framework for open access and common communication standards for smart meters.	Final report published 10 April 2014. Supplementary implementation advice to be provided in 2015.
COAG Energy Council work	Status
Demand response mechanism – option for demand side resources to participate in the wholesale electricity market.	On 11 December 2014, the COAG Energy Council tasked officials with preparing a rule change proposal for consideration by the AEMC, which will propose a DRM scheme based on voluntary participation by market participants and a staged implementation.
Regulation of third party energy service providers (now called ‘New products and services in electricity markets’)	Being considered by officials under the COAG Energy Council.
Implementation of recommendations made in the National smart meter consumer protection and safety review.	Implementation by COAG Energy Council through demand side participation reform agenda.

B Research approach

Survey

The objective was to consult with consumer representatives prior to the AEMC's first consumer priorities forum to ensure discussion is focused on what they see as the issues of highest importance consumer roundtable members appreciated the opportunity to contribute questions to the survey Methodology was online survey sent to 94 organisations with 38 responses, representing a 40% response rate.

Forum

The purpose was to deliver intensive and personal discussion of issues with commissioners (face to face) across four break-out groups. We made sure consumer groups led discussion and AEMC listened to break out groups facilitated by AEMC staff with a Commissioner in each group.

"I thought the forum was really great! I found the format to be excellent. I really liked the small group sessions and the opportunity for close dialogue with the commissioners. Thank you for all your hard work on this, and for the great result."

- Jo De Silva, Convenor National Roundtable on Energy (email)

Quantitative ranking of issues effectively focussed discussion. According to participant feedback we identified the right issues.

Three rounds of discussions:

- Round one (in assigned four groups) discussed vulnerable customers
- Round two (in assigned four groups) discussed consumer engagement
- Round three (in three groups of participants' choice based on topic)

New technologies and demand

Gas pricing

Co-ordination between government agencies

Wrap up at the end with summaries from each Commissioner

C Forum Agenda

Figure C.1

Time	Item	Speaker
9.00 am	Registration, tea and coffee	
9.30 am	Introduction	Ms Sue Vercoe Newgate Research
	Overview and online survey report	Mr Paul Smith AEMC Chief Executive
	AEMC consumer research 2014 Questions if time allows	Ms Sue Vercoe Newgate Research
9.55 am	Consumer group presentations	
	South Australian Council of Social Services	Ms Jo De Silva Senior Policy Adviser
	St Vincent de Paul Society	Mr Gavin Dufty Manager of Policy and Research
	Consumer Utilities Advocacy Centre	Ms Jo Benvenuti CUAC Executive Officer & Consumers' Federation of Australia Chair
10.10 am	Break out groups – round one	
	Participants introduce themselves and briefly explain issues of most importance to their organisation. Then groups will discuss issues related to vulnerable customers.	
10.50 am	Morning tea	
11.05 am	Break out groups – round two	
	Participants discuss issues related to consumer engagement in the market	
11.35 am	Break out groups – round three	
	Participants discuss issue of choice from three options: Gas pricing (red group); new technology and falling demand (blue group); co-ordination between governance agencies (yellow).	
12.00 pm	Summary, reflections and thanks	
	Observations from AEMC Commissioners and Chief Executive on the day's discussion. Questions from the floor	Mr Paul Smith AEMC Chief Executive
		Dr Brian Spalding AEMC Commissioners
		Neville Henderson AEMC Commissioner
		Mr John Pierce AEMC Chairman
12.30 pm	Lunch	
1.30 pm	Event close	

D List of forum participants

	Name	Title	Organisation	State
1	Craig Memery	Energy Policy Advocate	Alternative Technologies Association	Victoria
2	Christine Bell	Senior Manager - Financial and Housing Inclusion	Anglicare SA	South Australia
3	Denise Boyd	Director - Policy & Campaigns	Consumer Action Law Centre	Victoria
4	Claire Maries		Consumer Action Law Centre	Victoria
5	Jo Benvenuti	Executive Officer	Consumer Utilities Advocacy Centre	Victoria
6	Peter Strong	Executive Director	Council of Small Business of Australia	Victoria
7	Emma Keene	General Manager - Policy and Engagement	Energy and Water Ombudsman New South Wales (EWON)	New South Wales
8	Justin Stokes	Senior Research and Communications Adviser	Energy and Water Ombudsman Victoria (EWOV)	Victoria
9	Helen Scott	Energy Programs Coordinator	Ethnic Communities Council (NSW)	New South Wales
10	Louise Hicks	Project Coordinator	Financial & Consumer Rights Council	Victoria
11	Gill Owen	Research Program Leader	Monash University	Victoria
12	Rhiannon Cook	Corporate Service Coordinator	New South Wales Council of Social Services (NCOSS)	New South Wales
13	Oliver Derum	Senior Policy Officer - Energy + Water Consumers' Advocacy Program	Public Interest Advocacy Centre	New South Wales

	Name	Title	Organisation	State
14	Gabrielle Kuiper	Senior Policy Officer - Energy + Water Consumers' Advocacy Program	Public Interest Advocacy Centre	New South Wales
15	Jo De Silva	Senior Policy Officer	South Australian Council of Social Services	South Australia
16	Gavin Dufty	Manager – Policy and Research	St Vincent de Paul Society	Victoria 17
17	Joanna Leece	Executive Manager - Energy and Financial Inclusion	Uniting Care Kildonan	Victoria (& Tasmania?)
18	Mark Henley	Manager - Energy Advocacy	Uniting Communities	Uniting Communities South Australia
19	Dean Lombard	Senior Policy Advisor -	Victorian Council of Social Services	Victoria
20	Kerry Connors	Executive Director	Consumer Advocacy Panel	New South Wales
21	Caitlin Whiteman	Senior Research and Communications Officer	Energy and Water Ombudsman Victoria (EWOV)	Victoria
22	Stacey Tabert	Senior Researcher	Brotherhood of St Lawrence	Victoria
23	Katrina Buxton	Policy Adviser	Australian Industry Group	Victoria
24	Angus Nardi	Deputy Director	Shopping Centre Council of Australia	Victoria
25	Bronwyn Colby	Policy Officer	SACOSS	South Australia
26	Marguerite Grieve	Energy Policy & Research	TASCOSS	Tasmania
27	Andrew McKenna	Senior Policy Adviser	Business SA	South Australia
28	Nadine Lester	Energy Policy Officer	QCOSS	Queensland
29	Martin Jones	Research and Policy Advocate	Consumer Utilities Advocacy Centre	Victoria

	Name	Title	Organisation	State
	John Pierce	AEMC Chairman	AEMC	
	Brian Spalding	AEMC Commissioner	AEMC	
	Neville Henderson	AEMC Commissioner	AEMC	
	Paul Smith	AEMC Chief Executive	AEMC	
	Chantelle Bramley	Senior Director – Strategy & Economic Analysis Team	AEMC	
	Chris Spangaro	Senior Director – Retails and Wholesale Markets Team	AEMC	
	Richard Owens	Senior Director – Transmission and Distribution Networks	AEMC	
	Tara D'Souza	Senior Adviser	AEMC	
	Sarah Lau	Senior Adviser	AEMC	
	Dominic Adams	Adviser	AEMC	
	Suzanne Falvi	Senior Lawyer	AEMC	
	Prudence Anderson	Communication Manager	AEMC	
	Karyn Martinez	Project Officer	AEMC	
	Sue Vercoe	Managing Director	Newgate Research	

E Ranking order all issues



F Survey questions

Survey: AEMC Consumer Priorities Forum 2014

AEMC Consumer Priorities Forum 2014 Survey

Thank you for taking the time to complete this survey. It should only take you 10 to 15 minutes to complete and your feedback will be used by the AEMC to inform the agenda at the first Consumer Priorities Forum to be held with consumer representatives in Melbourne on the morning of Monday 19th May 2014.

Please be assured that the survey results will be provided to the AEMC on an aggregated basis and your response will not be linked to your name or organisation.

If you have any queries about the Consumer Priorities Forum, please contact Richard Owens, Acting Senior Director, AEMC on 02 8296 7800 or Richard.Owens@aemc.gov.au.

If you have any technical issues with the survey please contact Katherine Rich at Newgate Research on 03 9611 1850 or Katherine.Rich@newgateresearch.com.au.

Please start the survey now by clicking on the Continue button below.

How much would you say you know about the roles and responsibilities of the AEMC?

- Quite a lot
- A fair bit
- Only a little
- Nothing at all

What would you say are the top three energy issues facing consumers that you think should be discussed at the forum? Please enter the issues from highest priority to lowest and be as specific as possible

1.

2.

3.

Ranking of Issues

We are now going to ask you to rate the importance of a series of issues that are grouped into five sets. The AEMC appreciates this is not an exhaustive list and you will have the opportunity to raise any other issues that are important to you at the end of the survey.

The first set of issues relates to the *impact of rising electricity prices*. Where 0 is not at all important, 5 is fairly important and 10 is extremely important, how important do you think it is for consumers that the following issues be discussed at the forum?

	Not at all important					Extremely important					Don't know / Unsure	
	0	1	2	3	4	5	6	7	8	9		10
Retailers' hardship policies *	<input type="radio"/>											
The high level of disconnections *	<input type="radio"/>											
Rising debt levels and concerns about the debt policies of retailers and other debt collection issues *	<input type="radio"/>											
The outcomes of the next round of transmission and distribution revenue determinations *	<input type="radio"/>											
The need to review energy concessions to ensure that they are up-to-date and appropriately targeted *	<input type="radio"/>											

The second set of issues relates to *retail gas*. Where 0 is not at all important, 5 is fairly important and 10 is extremely important, how important do you think it is for consumers that the following issues be discussed at the forum?

	Not at all important					Extremely important					Don't know / Unsure	
	0	1	2	3	4	5	6	7	8	9		10
Increases in natural gas prices, particularly where gas is a relatively large component of expenditure and consumers have little ability to alter their usage *	<input type="radio"/>											
Whether all new residences should be connected to gas *	<input type="radio"/>											
Potential for programs to provide vulnerable customers with more energy efficient gas appliances *	<input type="radio"/>											

The third set of issues relates to *improving consumer engagement*. Where 0 is not at all important, 5 is fairly important and 10 is extremely important, how important do you think it is for consumers that the following issues be discussed at the forum?

	Not at all important					Extremely important					Don't know / Unsure	
	0	1	2	3	4	5	6	7	8	9		10
The ability of consumers to understand energy retail offers and choose a retailer or plan that suits their needs *	<input type="radio"/>											
The ability of consumers to understand and respond to new flexible pricing structures, eg time of use or demand-based charges *	<input type="radio"/>											
The extent to which some consumers are not currently engaged in												

existing consumer protections are adequate in a deregulated environment *	<input type="radio"/>											
Appropriate regulation of new market participants and new business models, eg solar businesses, metering providers, energy service companies *	<input type="radio"/>											
The impact of differences between NECF and non-NECF consumer protections and the impact of inconsistent regulatory requirements across the jurisdictions *	<input type="radio"/>											
Ensuring sufficient clarity in energy businesses' contracts and advertising and ensuring consumers fully understand what they are agreeing to *	<input type="radio"/>											
Consumer protections for vulnerable consumers that are supplied by energy resellers, eg consumers in residential parks and some apartments *	<input type="radio"/>											

Now that you've read through the five sets of issues, how would you rate the relative importance of each? Please rank them from most important (1) to least important (5) *

The impact of rising electricity prices	<input type="text"/>
Issues relating to retail gas	<input type="text"/>
Improving consumer engagement	<input type="text"/>
How well the current regulatory arrangements will respond to changes in the market	<input type="text"/>
Ensuring the current energy sector consumer protections are adequate	<input type="text"/>

Rank values must be between 1 and 5

The 2013 AEMC Strategic Priorities report identified a number of issues to guide the commission work program in relation to its 'Consumer Priority'. Where 0 is not at all relevant, 5 is fairly relevant and 10 is extremely relevant, to what extent do you think these priorities are still relevant for market development?

	Not at all relevant					Extremely relevant					Don't know / Unsure	
	0	1	2	3	4	5	6	7	8	9		10
Empower consumers to participate in regulatory and policy processes *	<input type="radio"/>											
Improve market information so consumers are better equipped to make energy use choices that are right for them *	<input type="radio"/>											
Promote efficient competitive markets which provide incentives for retailers to minimise costs and prices, and offer consumers a range of tariffs *	<input type="radio"/>											
Flexible, cost-reflective electricity prices to help minimise the cost over the long term *	<input type="radio"/>											

Are there any other issues not mentioned that you believe the AEMC should be exploring during these forums? Please enter the issues from highest priority to lowest and be as specific as possible 1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Do you have any final comments you would like to make in relation to this survey, the upcoming forum or the AEMC more broadly? Please be as specific as possible

Finally, just some questions about you and your organisation. Providing us with this information will mean that Newgate Research knows you have completed the survey and will not follow-up with you. Just to remind you, these results will be provided to the AEMC on an aggregated basis and your responses will not be linked to your name or organisation.

What is your name and the name of the organisation you work for?

Name:

Organisation Name:

What jurisdiction are you in? *

- ACT
- Federal
- NT
- SA
- TAS
- VIC
- WA
- NSW
- QLD