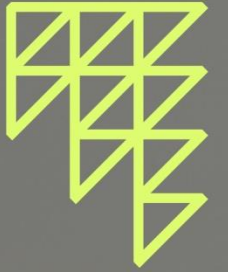


Consumer Advisory Panel Meeting



15 May 2025

Greetings

Leanne Muffet

Independent Facilitator

Acknowledgement of Country

ElectraNet acknowledges
the Traditional Owners of
the land and waters on
which we operate.

We pay our respects to
their Elders past, present
and emerging and extend
that respect to all other
Aboriginal and Torres Strait
Islander people of Australia.



Meeting Agenda

1	TIME	ITEM	PRESENTERS
1.	9:30am (10 mins)	Greeting + Acknowledgement of Country Introduction Kelly-Anne Saffin	Leanne Muffet, (CAP Independent Facilitator)
2.	9:40am (20 mins)	Approval of minutes, action items + general updates <ul style="list-style-type: none"> Action items and approval of minutes Yorke Peninsula Outage NTx CPAI update RAP Innovate 	Leanne Muffet + Simon Appleby (ElectraNet)
3.	10:00am (25 mins)	Hot Topics	All
4.	10:25am (20 mins)	Reference Groups – Updates <ul style="list-style-type: none"> Revenue Reset RG Update NTx RG Update Q&As 	Georgina Morris + Mark Henley (CAP Members)
5	10:45am	Morning Tea/Break	
6.	10:50am (1 hr)	SA Network Planning Outlook <ul style="list-style-type: none"> Part A – Transmission Annual Planning Report Part B - Future Networks and Coordination with Transmission Q&As 	<i>Brad Harrison (ElectraNet) + James Brown (SA Power Networks)</i>
7.	11:50am (10 mins)	Wrap up, other business	Simon Appleby + Leanne Muffett
8.	Midday	Lunch	
9.	12:15pm	CAP Only Session	Leanne Muffett

Action Items

No	Action	Responsible	Status
1.	CAP to provide recommendations regarding new members. Leanne Muffet to email CAP Members seeking suggestions. Chris to continue conversation with Kelly-Anen Saffin and compile a list of possible First Nation candidates	LM/ CH	Completed
2	AM to update the final CAP ToR and email to all CAP	AM	Completed
3	Leanne to liaise with Rebecca re a presentation to the CAP	LM	Completed
4	ElectraNet to email the CAP a final copy of CPAI	AM	Completed
5	Rebecca to send through an article of the complexity of the green steel ambition	RK	In train
6	ElectraNet to organise a joint CAP meeting with SAPN Consumer Advisory Board	CH/AM	In train
7	ElectraNet to create a visual timeline to be created and sent to CAP of Reference Group meetings	CH/AM	In train
8	ElectraNet to resend to Better Reset handbook to RRRG add link	AM / LM	Completed
9	ElectraNet to invite AEMO and state planning department to a future meeting CAP meeting to speak about demand forecasting.	CH/AM	In train
10	Chris with others will update the Reference Groups ToR Alycia will arrange for the Reference Group meetings to be scheduled.	CH with input from others	Completed

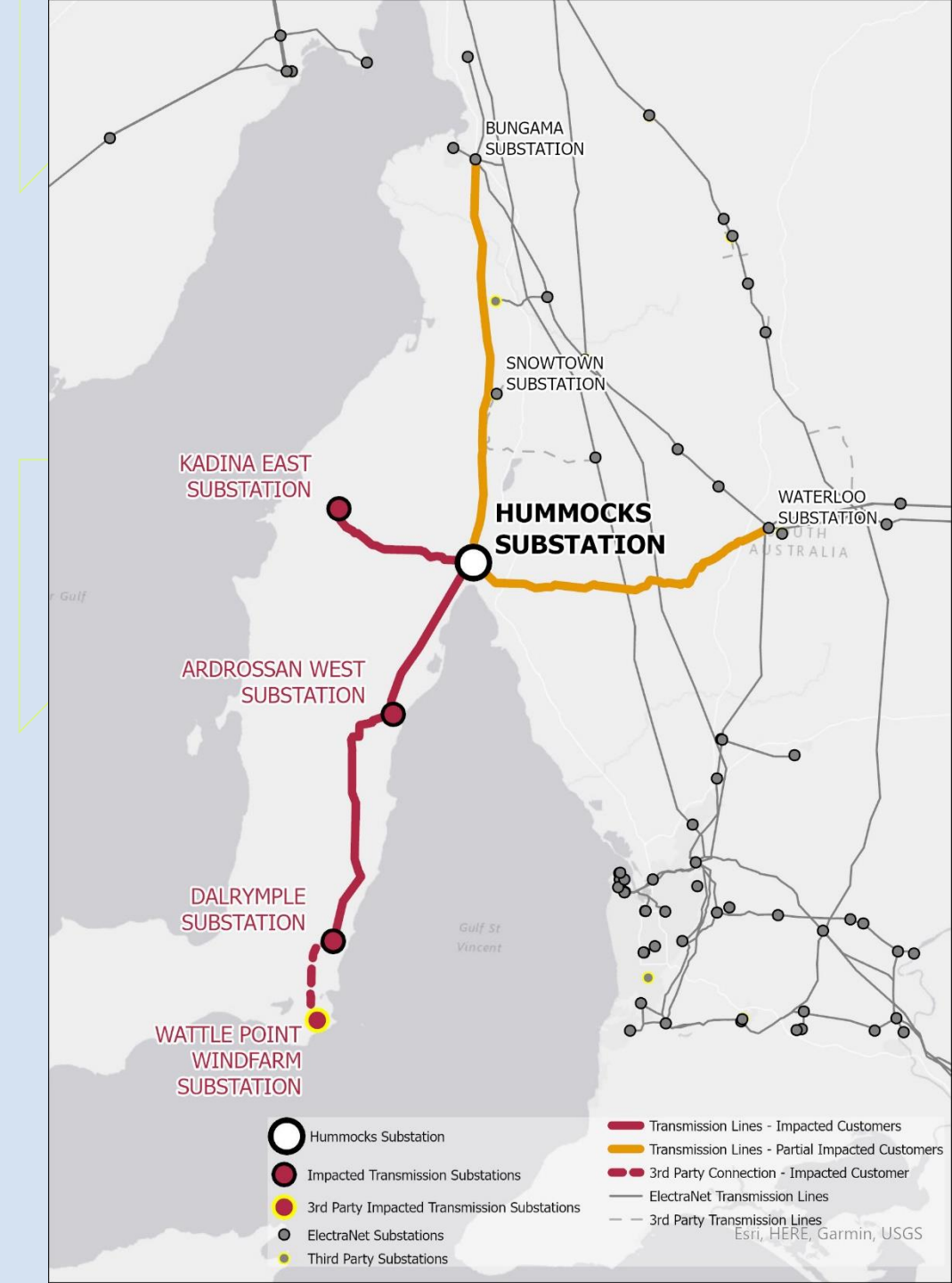
Yorke Peninsula Outage

Simon Appleby

Director Energy Policy and Strategy

Yorke Peninsula Outage – the details

- On 14 March transmission services were interrupted to the Yorke Peninsula from 5.47am.
- Extended dry conditions around the State have seen an accumulation of dust and salt on the network, known as insulator pollution.
- On the morning of 14 March a high-degree of condensation (dew) interacted with the pollution causing 'flashing'.
- The 'flashing' led to the network tripping and to damage being caused at the Hummocks substation and surrounding transmission lines.
- Transmission services were fully restored by 12:09am on 15 March.
- Approximately 27,000 homes and businesses were impacted.



Yorke Peninsula Outage – risk and mitigation

- ElectraNet regularly monitors its assets and had identified the build up of pollution, and was implementing a targeted insulator washing program to address it.
- ElectraNet had been conducting proactive, manual ground-based washing of critical insulators in the Yorke Peninsula area, before the outage occurred, to mitigate the identified risk.
- Prior to the outage ElectraNet had scheduled a planned outage for Sunday, 16 March to undertake further targeted washing works on assets which required de-energisation to be washed, including the Hummocks substation.
- ElectraNet has continued to conduct both ground-based and aerial inspection and washing of critical assets. Where the need is identified, targeted programs are put in place to wash impacted assets to reduce the risk of outages.
- A planned outage to wash the Hummocks substation was taken on 13 April and another one is planned for May 21.
- We are reviewing our maintenance procedures to identify any areas of improvement.

Northern Transmission Project – CPA 1 Update

Simon Appleby

Director Energy Policy and Strategy

CPA1 Purpose + Benefits to Customers

- Determine efficient and prudent project costs for options under development.
- Progress activities to undertake stakeholder and community engagement to inform project development and build social acceptance for the project.
- Commence environmental and statutory approvals.
- Engage with Traditional Owners.
- Commence easement activities and strategic land acquisition.
- Identify, explore and manage projects risks – development of mitigation measures.
- Achieve AEMO's ISP target date of 2029 to meet the optimal timing outlined in the identified need.
- Project market benefits analysis, network planning and scoping, network capability assessment including various studies to ensure optimum outcomes.
- Plan commencement of early contractor involvement.

Proposed Costs

Category	Total (\$m nominal)
Program and project management, Corporate costs and support, expenditure already incurred to end November 2024	\$4.1m
Legal, Risk and Governance support	\$3.7m
Network Planning and Regulatory Approval	\$5.2m
Stakeholder and community engagement and consultation programs, landholder and stakeholder relations	\$8.4m
Cultural Heritage engagement, agreements and survey	\$6.1m
Land and easement acquisition (initial identification, consultation and option negotiation), strategic land purchases	\$6.7m
Environmental impact assessments	\$2.1m
Procurement strategy and initial execution (pre-construction contracts including ECI) and Project Estimation	\$2.2m
Engineering, technical designs and specifications	\$6.2m
Delivery, GIS Systems, Innovation and Strategy, early site assessments	\$3.8m
TOTAL	\$48.6m

Innovate Reconciliation Action Plan

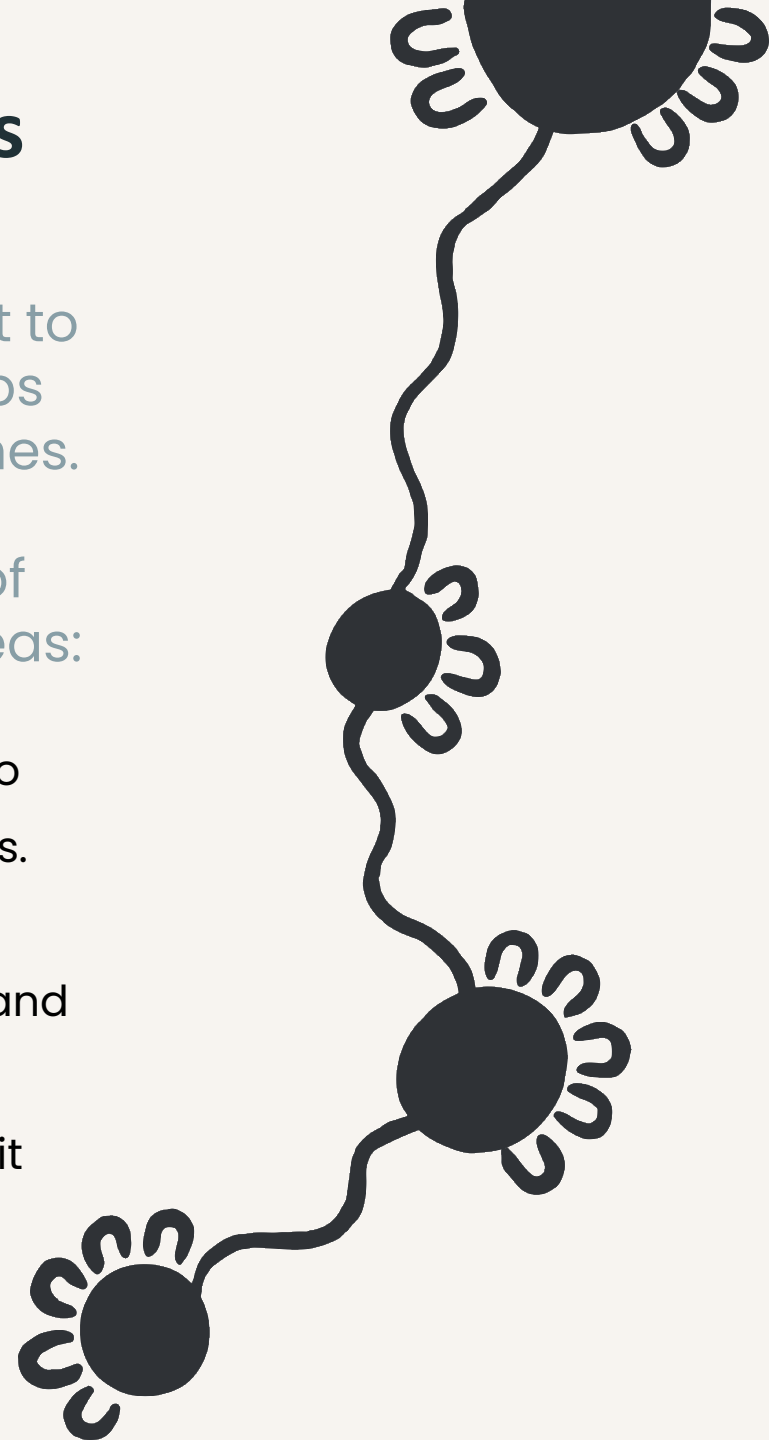
Alycia Martin
Stakeholder Coordinator

Reflect Reconciliation Action Plan achievements

Launched in November 2023, ElectraNet's first Reflect Reconciliation Action Plan reaffirmed ElectraNet's commitment to building meaningful relationships with Traditional Owner groups and supporting positive social, cultural, and economic outcomes.

The RAP Committee is proud to report the successful delivery of our Reflect RAP initiatives, which have focused on three key areas:

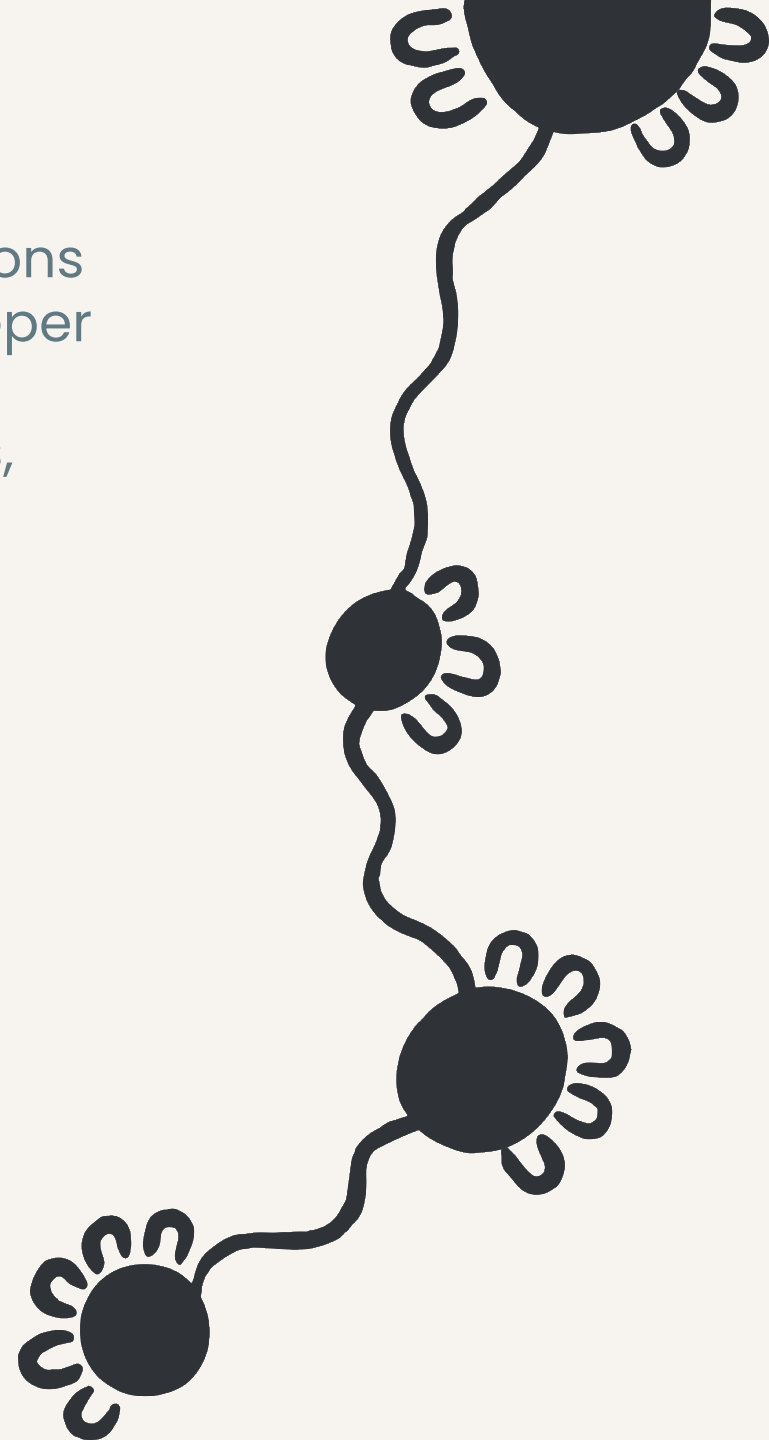
- **Strengthening Relationships** – Through a targeted sponsorship program to deepen engagement with Aboriginal and Torres Strait Islander communities.
- **Promoting Respect** – By delivering cultural awareness sessions, commemorating National Reconciliation Week, celebrating NAIDOC Week, and providing resources on cultural protocols.
- **Creating Opportunities** – Via procurement from Aboriginal and Torres Strait Islander businesses, inclusive recruitment practices, and active local engagement. (Supply Nation membership)



Reconciliation Action Plan: Innovate

The Innovate Reconciliation Action Plan (RAP) outlines the actions and commitments that ElectraNet will undertake to gain a deeper understanding of our sphere of influence, strengthen our relationships with Aboriginal and Torres Strait Islander peoples, and progress strategies to further advance reconciliation outcomes. The following highlights some of the key actions:

- Implementation of best practice engagement plans to support collaboration with Aboriginal and Torres Strait Islander stakeholders and organisations
- Promote positive race relations through anti-discrimination strategies
- Develop and implement cultural learning strategies
- Improve employment outcomes by increasing Aboriginal and Torres Strait Islander recruitment, retention and professional development
- Develop and implement an Aboriginal and Torres Strait Islander procurement strategy





Gabriel Stengle

ARTIST - KAURNA, NGARRINDJERI,
NARUNGGA AND WIRANGU





CAP Hot Topics

All CAP Members

Reference Groups – Updates

Georgie Morris + Mark Henley
CAP Members

Revenue Reset Reference Group update

Georgie Morris (RRRG member)



Revenue Proposal Key Milestones



Kick-off meeting



Expenditure Forecast Methodology

Finalise and lodge Revenue Proposal

AER publishes Draft Decision

Apr 25

Oct 25

Jun 26

Oct 26

Jan 27

Mar 27

Sep 27

Dec 27

Apr 27

AER Framework & Approach paper

Preliminary Proposal (exact date TBC)

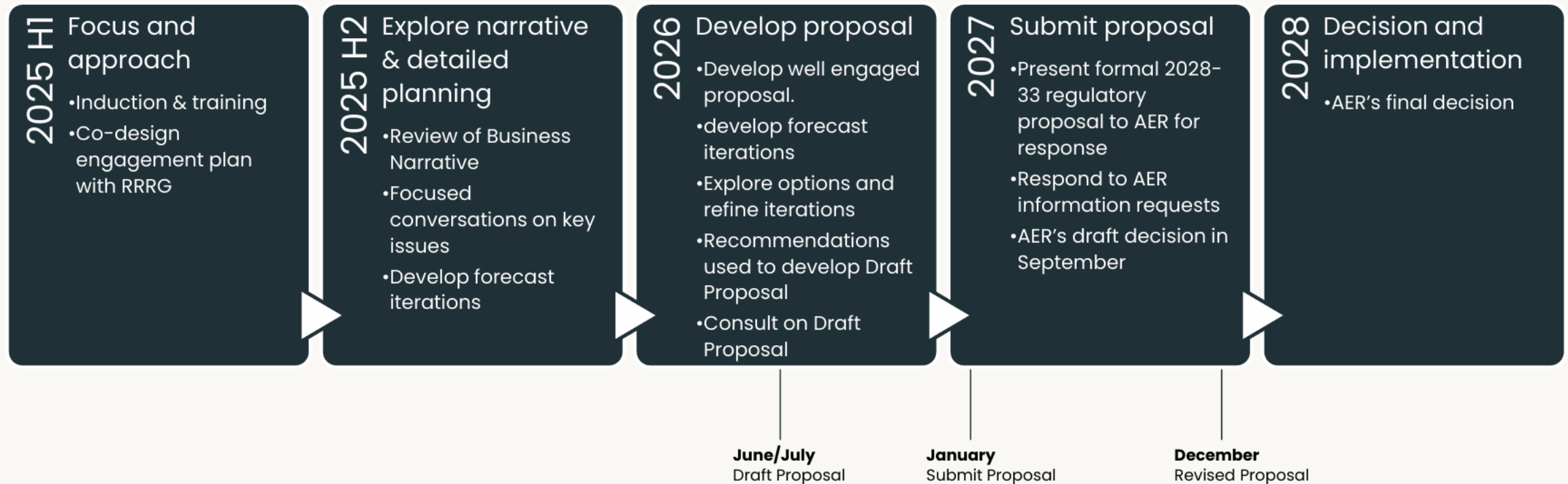
AER publishes issues paper

Finalise and lodge Revised Revenue Proposal

AER publishes Final Decision

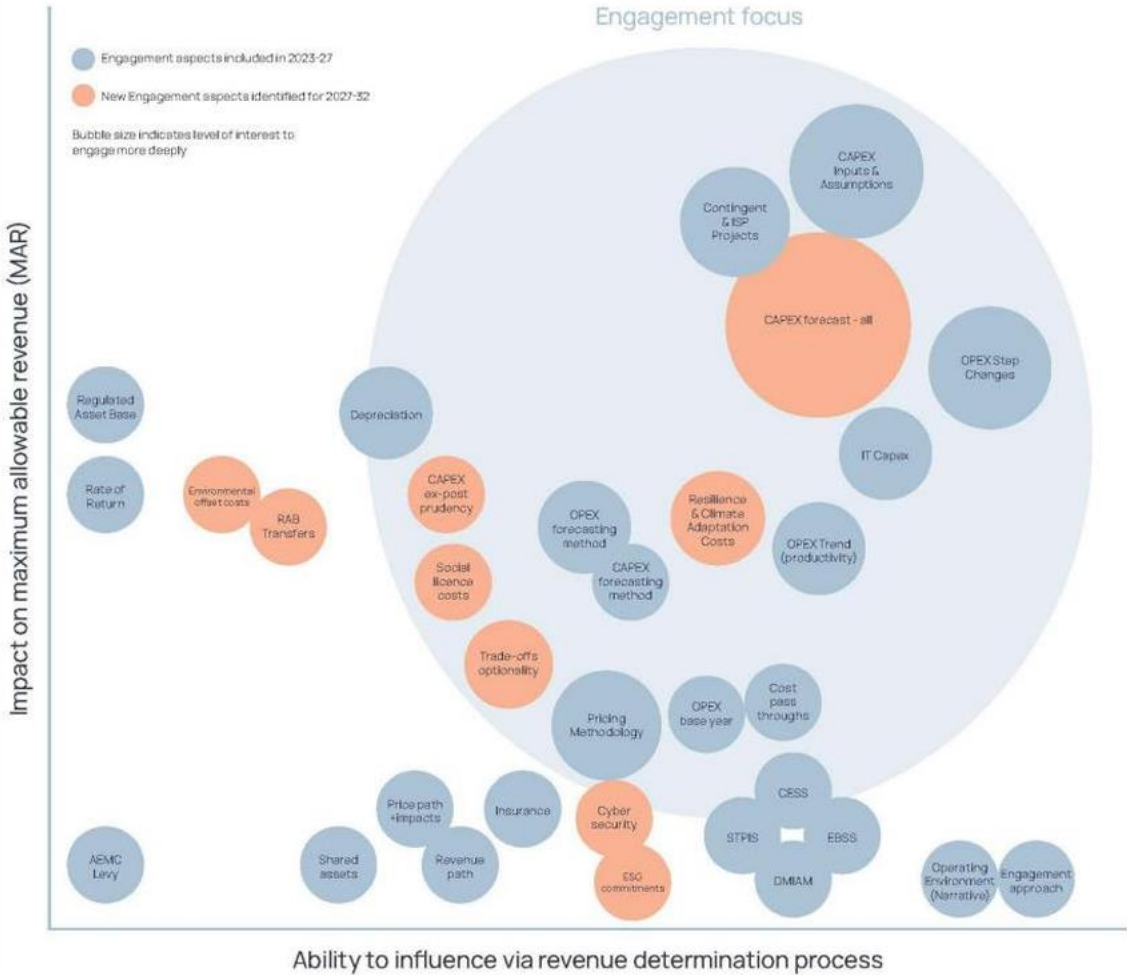
Consumer Engagement

Engagement Plan high level draft



Engagement Focus Area:

Ability to influence and the impact to revenue



Engagement Plan

- ElectraNet outlined its goal for the Revenue Proposal (RP) to be one that both the CAP and ElectraNet can stand behind – while a proposal that is capable of acceptance is ideal, the quality of engagement is what matters most.
- It was acknowledged that that revenue proposal has limited influence on the total revenue outcome. Much of ElectraNet's revenue is based on decisions of the past, however future expenditure will impact RAB and future revenue.
- Discussions on engagement included:
 - Forecast iterations: perhaps consider scenario planning.
 - Linkages with business planning and spheres of influence e.g., Powerlink's' Engagement Plan

ACTIONS FROM MEETING

- 1. Circulate early version of the draft engagement plan for review/discussion.**
-

Mike Swanston – AER CCP

Key Questions and themes:

- “Why should consumers trust ElectraNet?” and “what is your definition of value?”
- Expressed concern about dismissive analogies (e.g., “cost of a cup of coffee”) and stressed respect for the scale of proposed expenditure.

Key takeaways for good engagement:

- Engagement should be business-as-usual (BAU).
- Clearly demonstrate the risk of future decisions
- Develop and communicate a strong narrative of value. Getting clear on the definition of ‘value’ for different players... and articulate process and outcomes in clear language to customers
- Avoid minimising cost concerns; acknowledge real impacts on consumers (avoid statements like: ‘it’s just the cost of a cup of coffee’).
- Apply the Pub test: critical conversations: use **the Five Why’s** technique to explore issues (ask why? five times).
- Focus not just on the what, but the how. How do we do things, respect customers money?
- Apply the concept of ‘capable of acceptance’. May not like it, but may accept it. Informed consent.

Suggested Features of good engagement:

- Get the right / cross section of people in the room,
- Don’t leave message just to regulatory and comms people. Have technical people, strategy, CFO etc in the mix too
- Be Responsive, honest and genuine in responding to questions. This feeds into ‘show me the value’.

Action Agreed: ElectraNet and the RRRG to write to AER and ask for CCP. Letter to be sent to the facilitator.

RRG's expectations of ElectraNet

- Transparent process with early sharing of drafts
- Clear flowchart of engagement process.
- Access to personnel, resources and subject matter experts.
- Help with messaging to consumer groups (notes state assistance with messaging to our consumer groups?)

RRG would like to see:

- Mechanism for communication back to the CAP.
 - Clarification of who else ElectraNet is consulting, especially regarding SA government input.
 - Engagement options with directly connected customers explored.
-

What does “good” look like?

- Consumer fingerprints evident in the final proposal.
- Where disagreement exists, ensure reasoning is clear.
- Emphasis on transparency, responsiveness and evidence of decision making.

Action: Source document for the bubble diagram and circulate it to the RRRG.

Action: Schedule deep dive session on the bubble diagram for a future session.

Principles of RRG

- 1) **Purposeful and strategic engagement** - clear purpose & mandate, information shared early and in a way that invites strategic, constructive feedback.
- 2) **Informed Participation** - access to the right people and/or resources, high level of being informed, acknowledge informational asymmetry.
- 3) **Consumer-centric values** - reflects community needs.
- 4) **Transparency and accountability** -use plain language, pass the “pub test”.
- 5) **Outcome focused approach** – while the goal is a Revenue Proposal that is capable of acceptance, success is measured by the integrity of the process and the extent to which consumer perspectives are heard and respected.



NTx Reference Group update

Mark Henley (NTx RG member)

NTx RG End Point

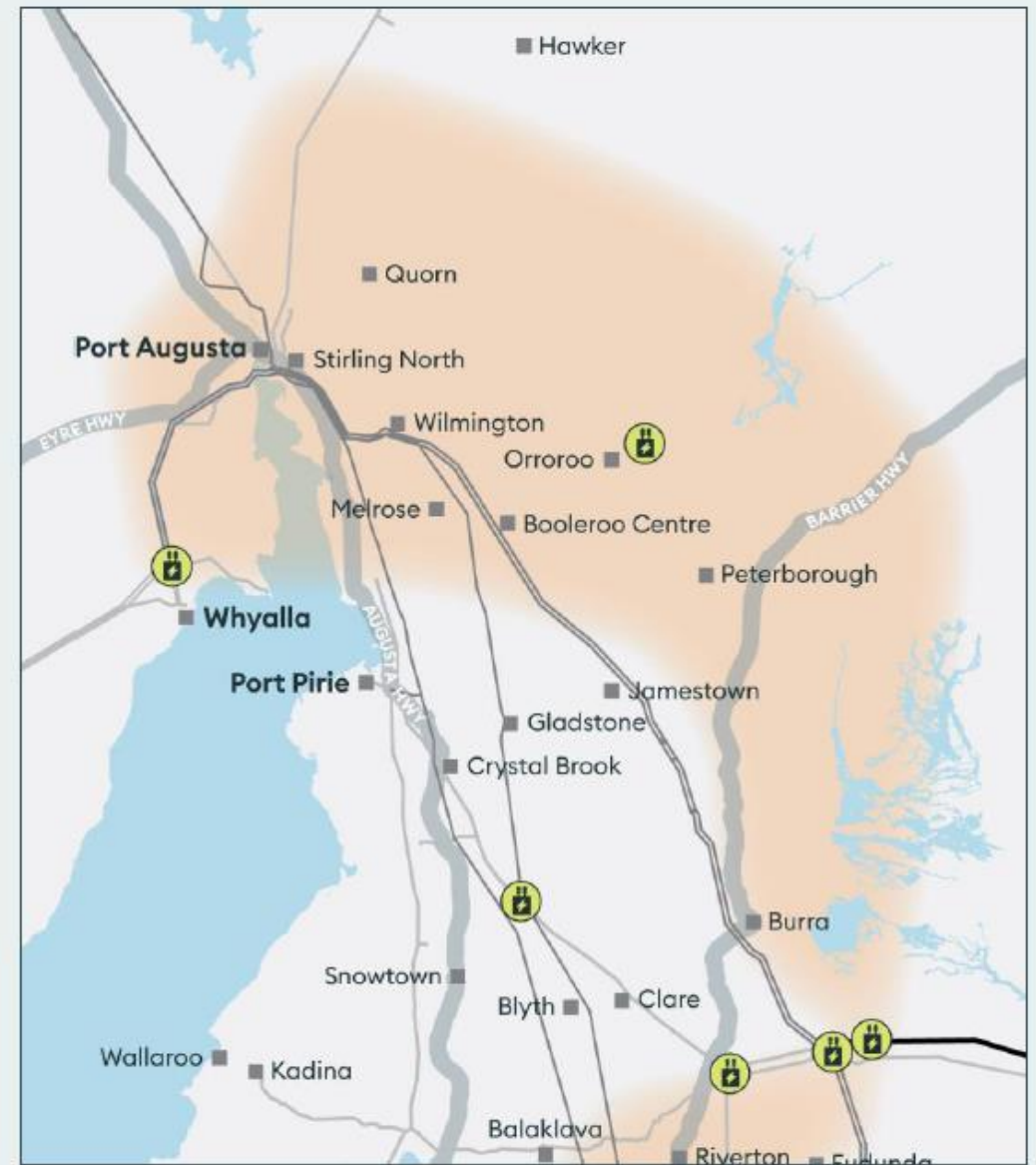
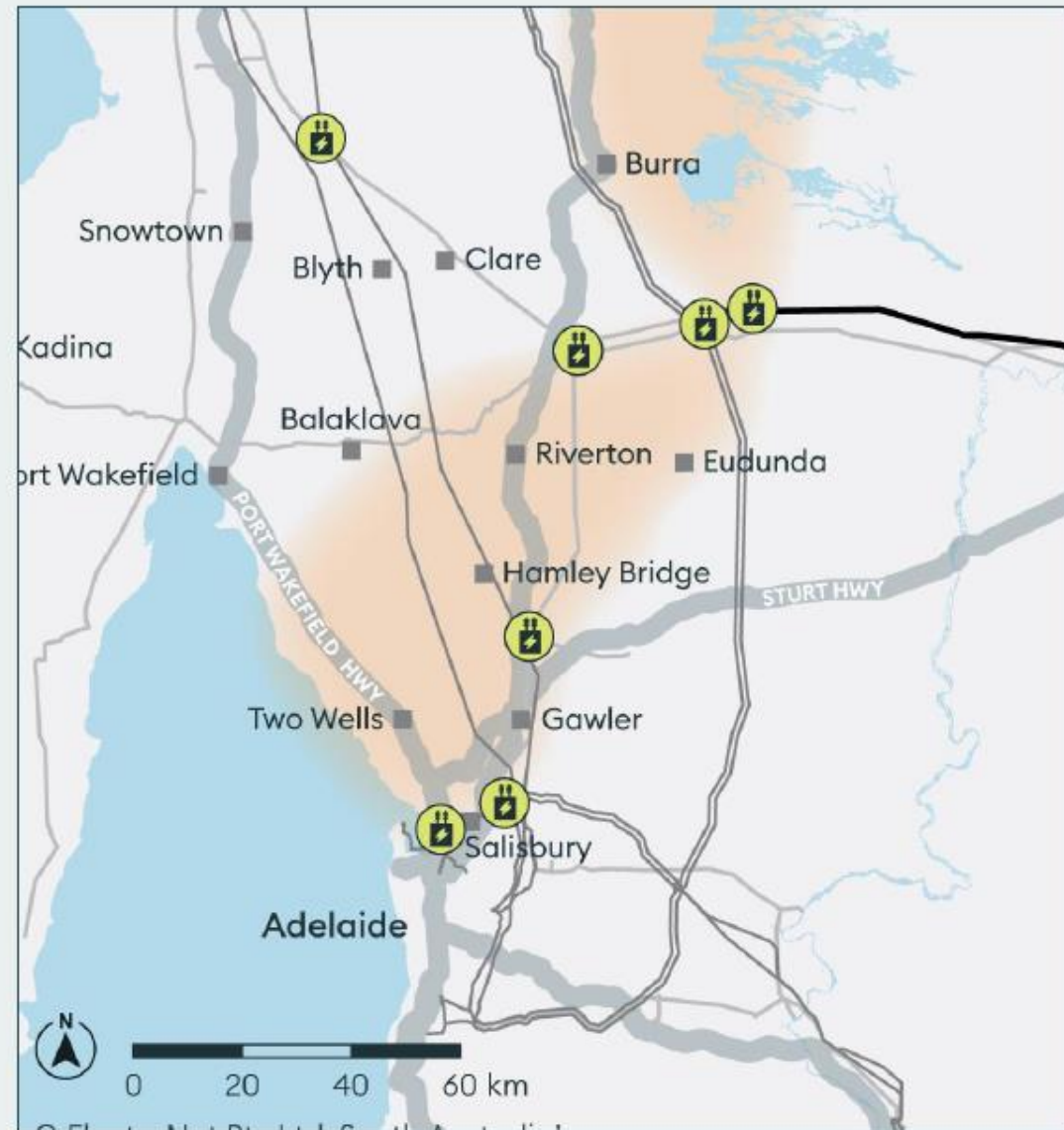
The primary output from the NTx RG will be a submission from the CAP on ElectraNet's Project Assessment Draft Report (PADR)

- Due December 2025 (unless otherwise agreed with AEMO).

Need to understand:

1. Who the target audience is – the AER and the general public
2. When the report will be needed in response to the PADR, which is due in December 2025 unless otherwise agreed between ElectraNet and AEMO
3. The draft approach / content / items to be covered





RG Key areas of interest

NTx RG Keen to understand:

- How the electricity demand will be forecast and whether the basis for the project still exists
- What “good” engagement involves across the project... ideas touted included:
 - Building on preestablished and preexisting networks
 - Tapping into community needs and creating “good” for the community
 - Ensuring diverse perspectives are captured

ACTIONS FROM MEETING

1. Electricity demand to be included on the reference group’s forward items including a discussion of demand forecasting approach from external speakers
 2. Present list of stakeholder groups that are being engaged to the working group and ensure it reflects diversity of stakeholders.
 3. Engagement update report to be added as a standing item to the Reference Group Agenda
-

NTx RG interface with Executive

Len Schoots - Chair ElectraNet's Major Project Steering Committee (MPSC) presented to the NTx RG

- The MPSC works closely with ENet's Executive on major project matters across the organisation
- An invitation was extended for the NTx RG to interface strongly with the MPSC and present to them on a quarterly basis

ACTIONS FROM MEETING

4. **MPSC Chair invited to attend all NTx RG meetings**
5. **Formal presentation to / interface from the NTx RG to the MPSC still to be clarified**

Principles of NTx RG

- 1) **Prioritise Transparency:** transparency will underpin discussions and information sharing
- 2) **Apply a “challenge” lens:** the RG actively tests ideas by constructively challenging assumptions (eg: have you thought about?...)
- 3) **Create a safe, two way forum:** meetings provide a safe space for open, and reciprocal exchange of ideas
- 4) **Create a “No Fear” culture:** the focus of the RG is on collaborative problem solving without fear of failure
- 5) **Demonstrate follow through:** all RG members commit to considering and responding to input and queries
- 6) **Share information promptly:** provide relevant information and seek input early to enable meaningful contributions
- 7) **Implement continuous feedback:** meetings and processes will be shaped by member feedback

SA Network Planning Outlook:

ElectraNet's Transmission Annual Planning Report

Brad Harrison

Manager Network Planning

Key Takeaways / Exec Summary

Key transmission projects

- Non-network solutions for system strength
- Improvements to System Strength Impact Assessment process

Policy is driving economic activity and connections interest

- Planning frameworks are not keeping up

Diminishing midday demand

Higher peaks and deeper troughs

Key drivers of the demand outlook

- Anticipated, probable and possible loads

ElectraNet demand outlook

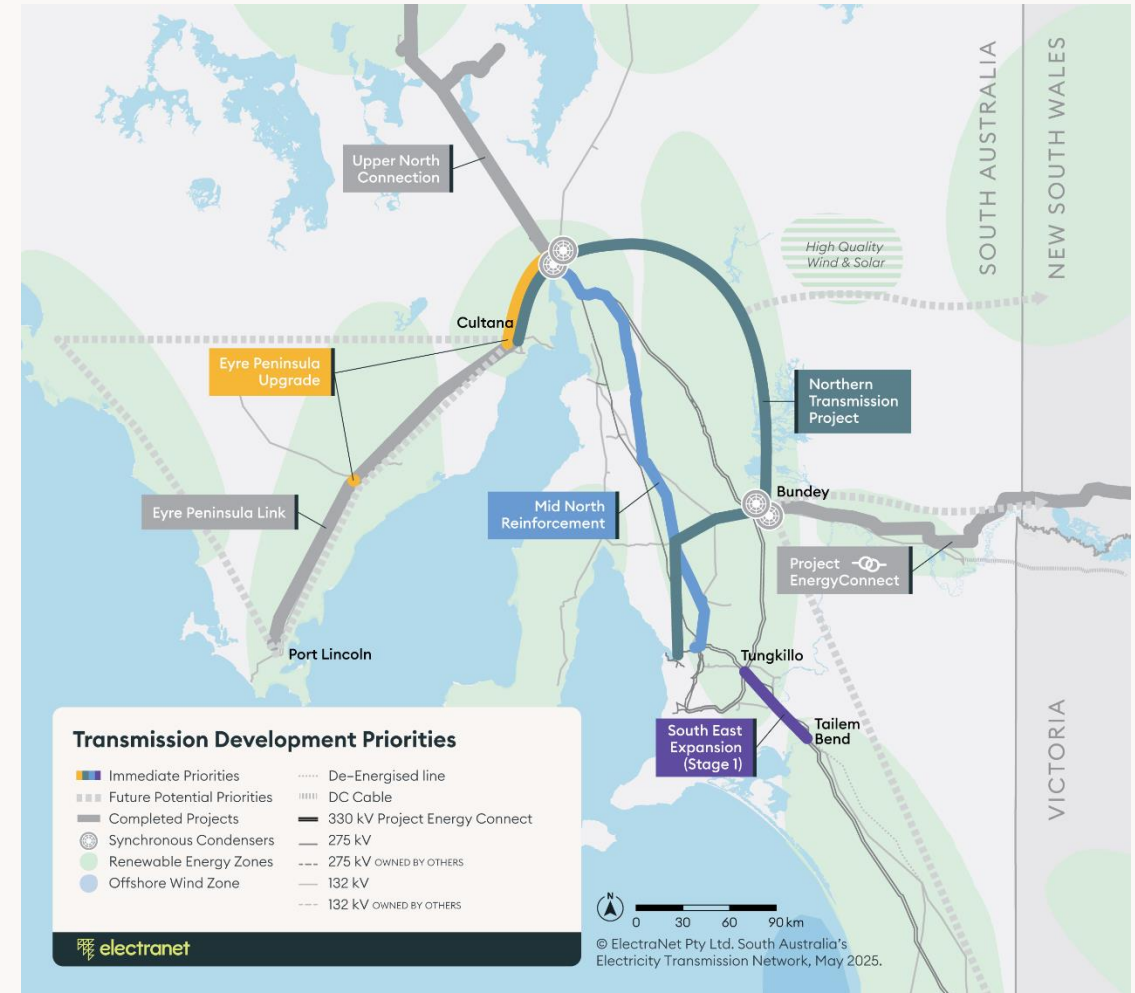
Joint planning with SA Power Networks

We highlight key transmission projects and support the need for new SA transmission frameworks

Transmission frameworks and key takeaways

- Government policy settings and funding commitments are creating new economic activity
- Forecasts used in the ISP continue to underestimate future electricity demand in South Australia. Large industrial loads represent the majority of the increase in the demand outlook
- Existing regulatory processes are lagging South Australia's demand outlook
- Similar jurisdictional arrangements to those introduced in other states now need to be considered for South Australia

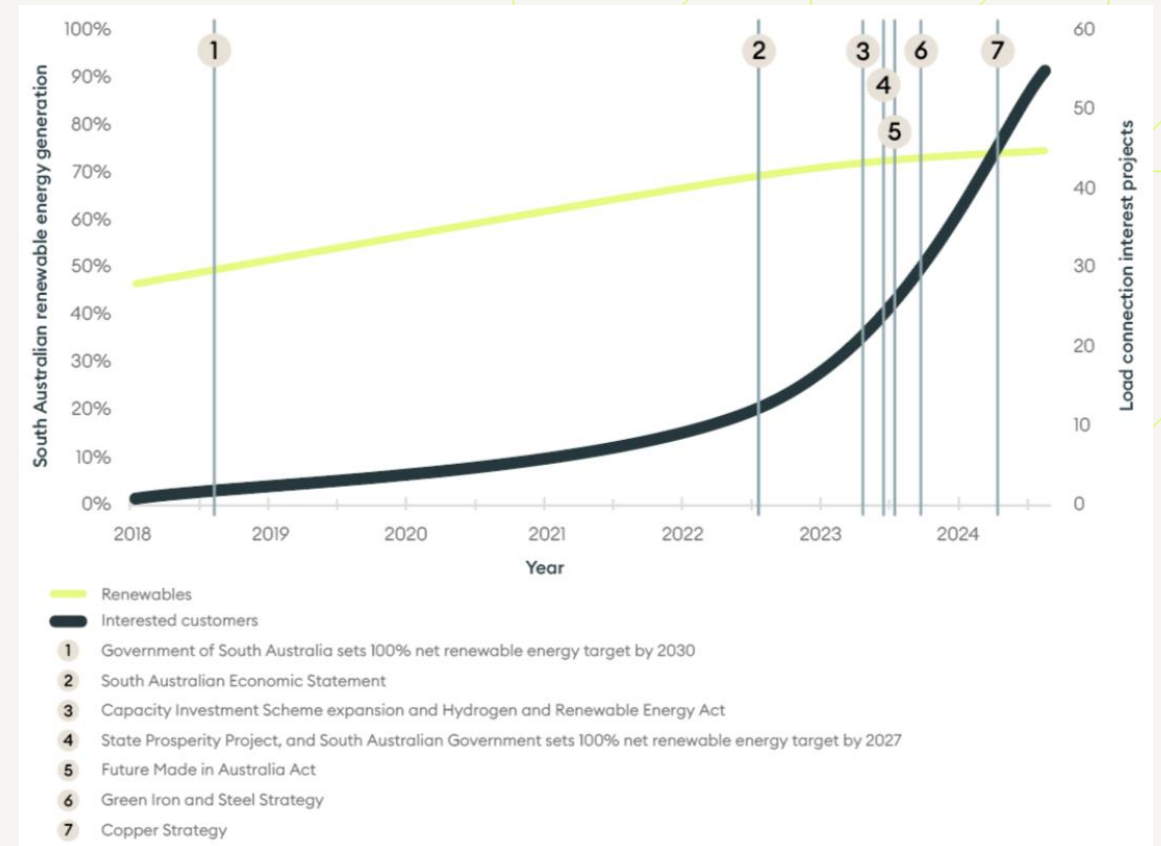
Transmission frameworks and key takeaways



Policy is driving economic activity and connections interest in South Australia

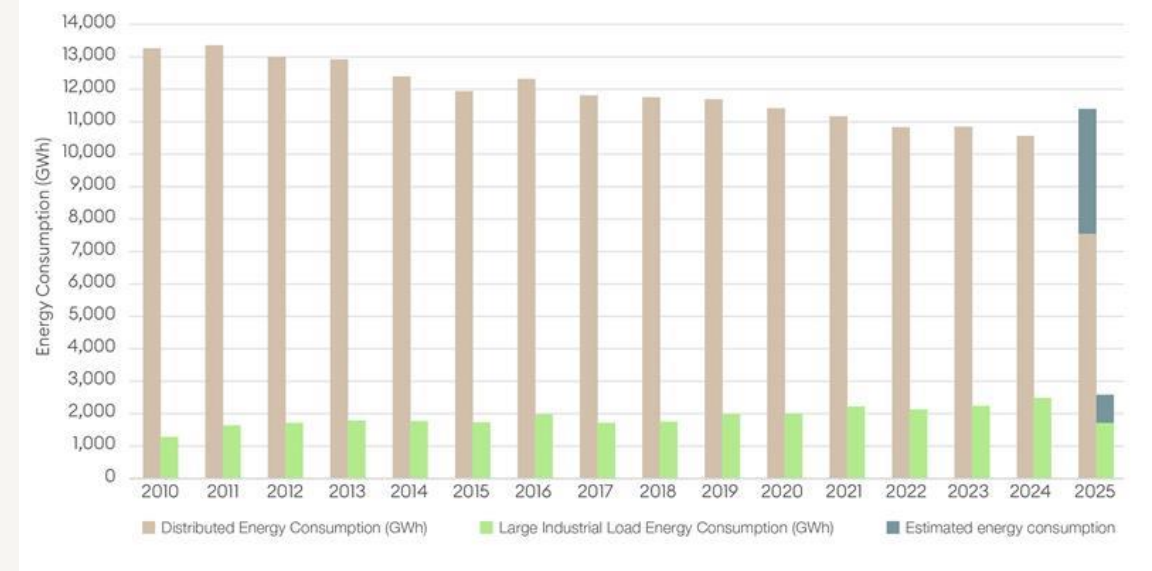
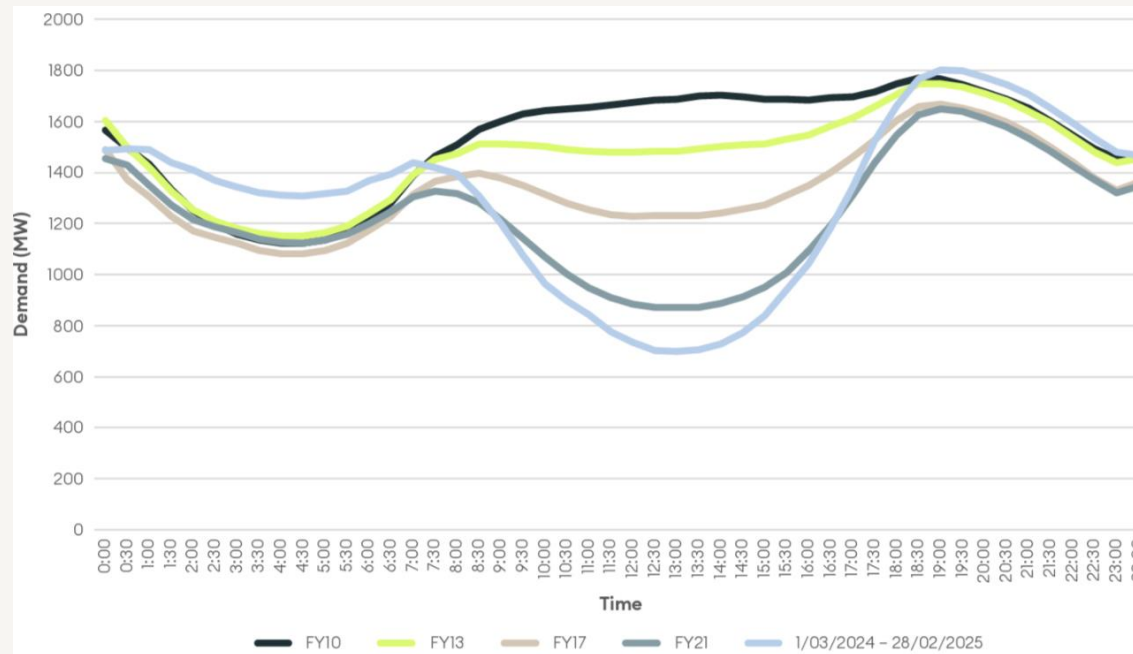
Key policies driving economic activity and connection interest

- SA Government 100% net renewables by 2027 (previously 2030)
- South Australian Economic Statement
- State Prosperity Project
- Green Iron and Steel Strategy
- Northern Water Project
- Hydrogen and Renewable Energy Act
- Whyalla Steelworks support
- Future Made in Australia
- Capacity Investment Scheme
- Renewable Energy Transformation Agreements



Diminishing demand in the middle day could be about to be reversed

Customer energy resources has reduced energy consumption on the transmission network particularly during the middle of the day

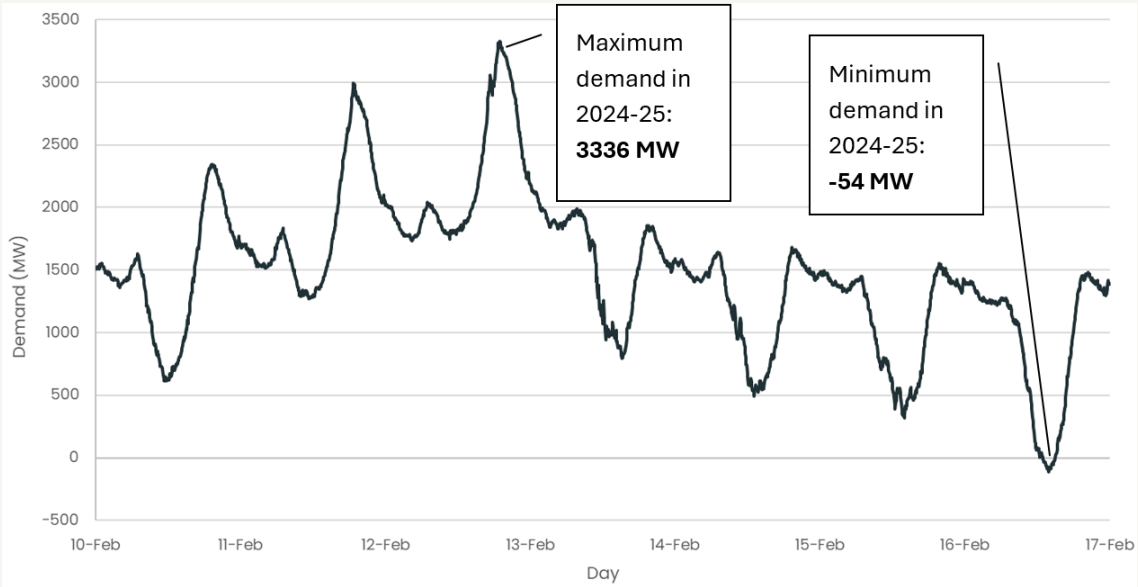


However, the declining distribution demand trend is reversing

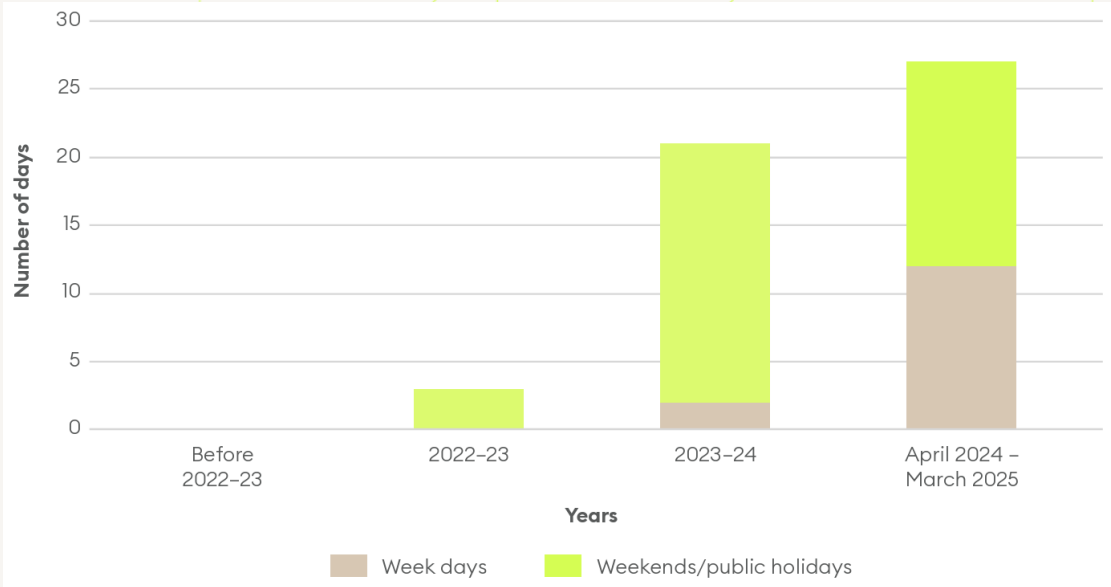
- Not mentioned: 2025 increasing industrial load despite disruption to BHP supply in November
- SAPN loads discussed next presentation

Higher peaks and deeper troughs

Demand profile on week of 12 February during summer heat wave, followed by lowest demand for the year four days later



Very low demands occurring more frequently, and on an increasing number of weekdays



We forecasting significant growth in large industrial loads for a range of scenarios

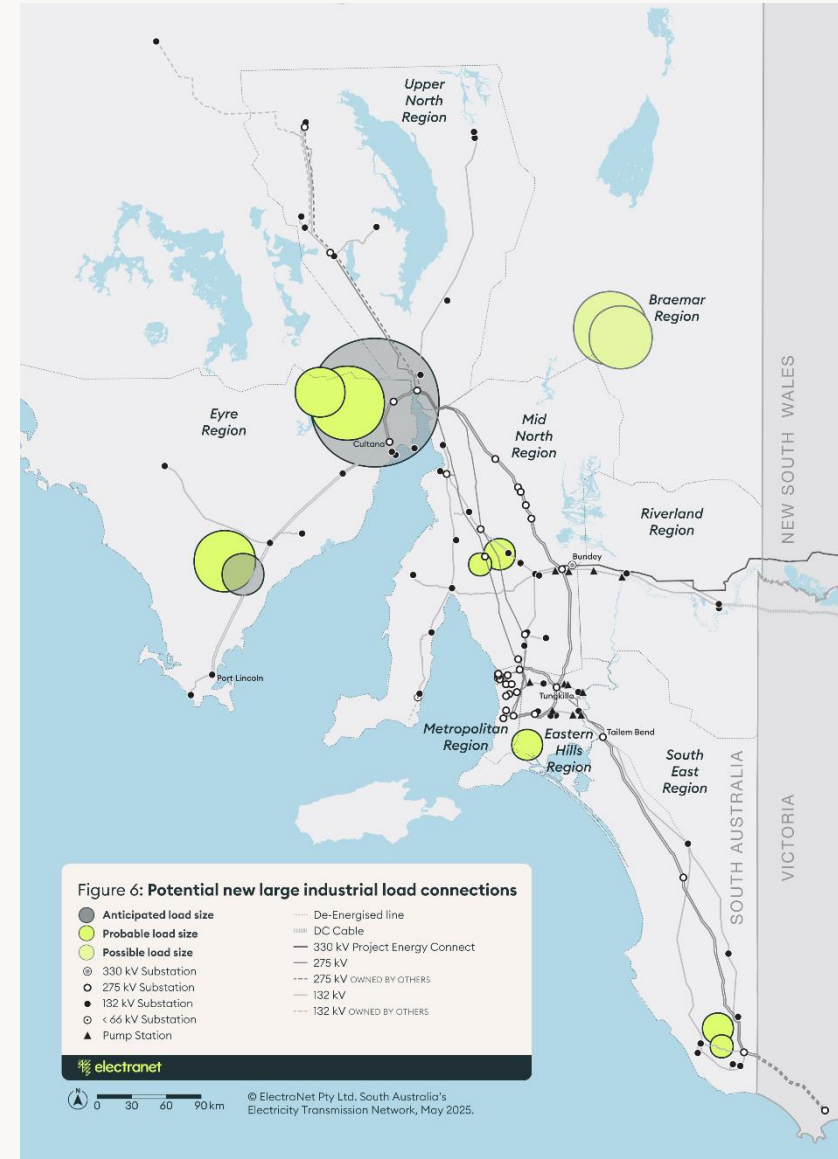
Increases in large industrial loads

New loads included in all scenarios

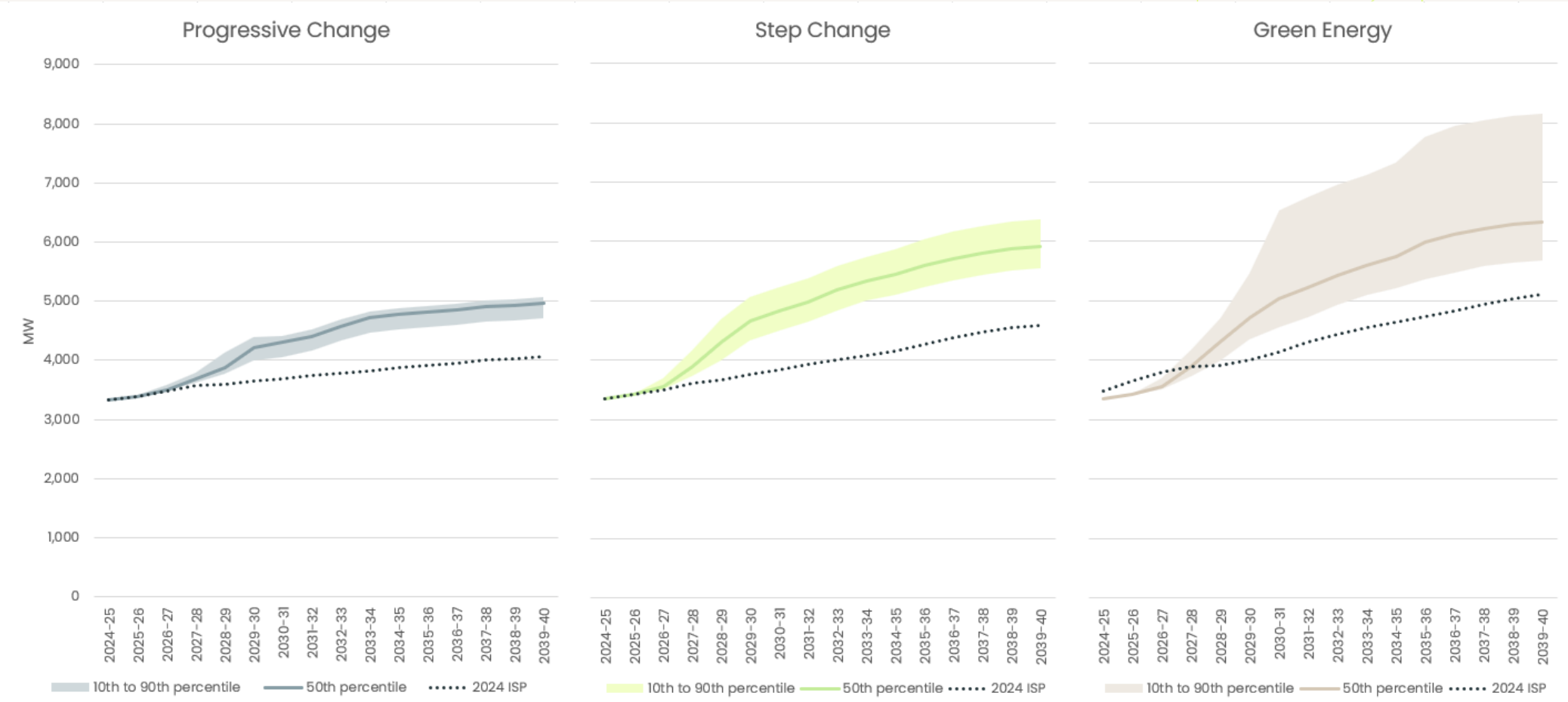
- 2 Anticipated loads

New loads included subject to scenario narrative

- 8 probable (no hydrogen based projects)
- Low probability loads still included in scenarios but impacted by probability
- Hydrogen hubs included in only Green Energy Exports, individually with low probability



ElectraNet demand forecasts



Coordination with distribution

Joint planning with SA Power Networks is ongoing activity

- Joint Planning meetings held every two months, including discussion of items such as demand forecasting, connection point planning, network connections, AEMO joint planning and the ISP, system security matters and initiatives, network operations, working group status reporting

Voltage Control Working Group

- Examples of working group outcomes: consideration of options for ongoing transmission network voltage control; connection point power factor requirements at times of low system demand

Demand Management Innovation Allowance

Demand forecasting

- SA Power Networks develops connection point demand forecasts – ElectraNet reviews the draft connection point forecast and provides feedback on matters to be considered further (example: how to consider charging of battery energy storage systems)

Reverse power flows

- We jointly monitor forecast reverse power flows and connection point reverse power capability

SA Network Planning Outlook: Future Networks and Coordination with Transmission

Fraser Hampton
SA Power Networks

ElectraNet CAP

15th May 2025



Empowering South Australia

About SA Power Networks



Sole distributor in
South Australia

Supply South
Australia's
1.7 million population

Supplying **900,000**
homes and businesses

2,200 employees in
more than 30 sites
across the state

600 apprenticeships
since 2003

Peak demand
3,145MW

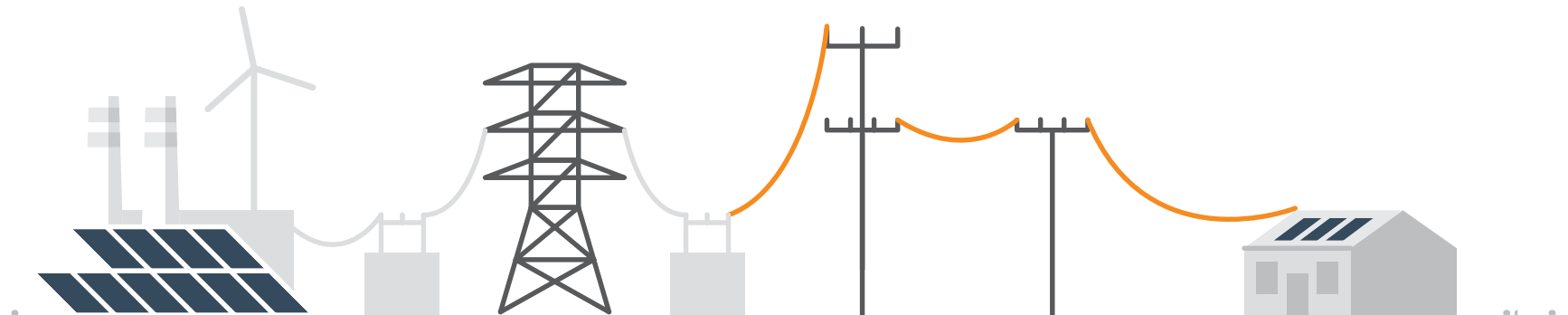
Electricity distributed
9,636GWh

Network coverage
over **178,000km²**

Route length around
89,000km

Oldest network assets
in the NEM

South Australian electricity supply chain



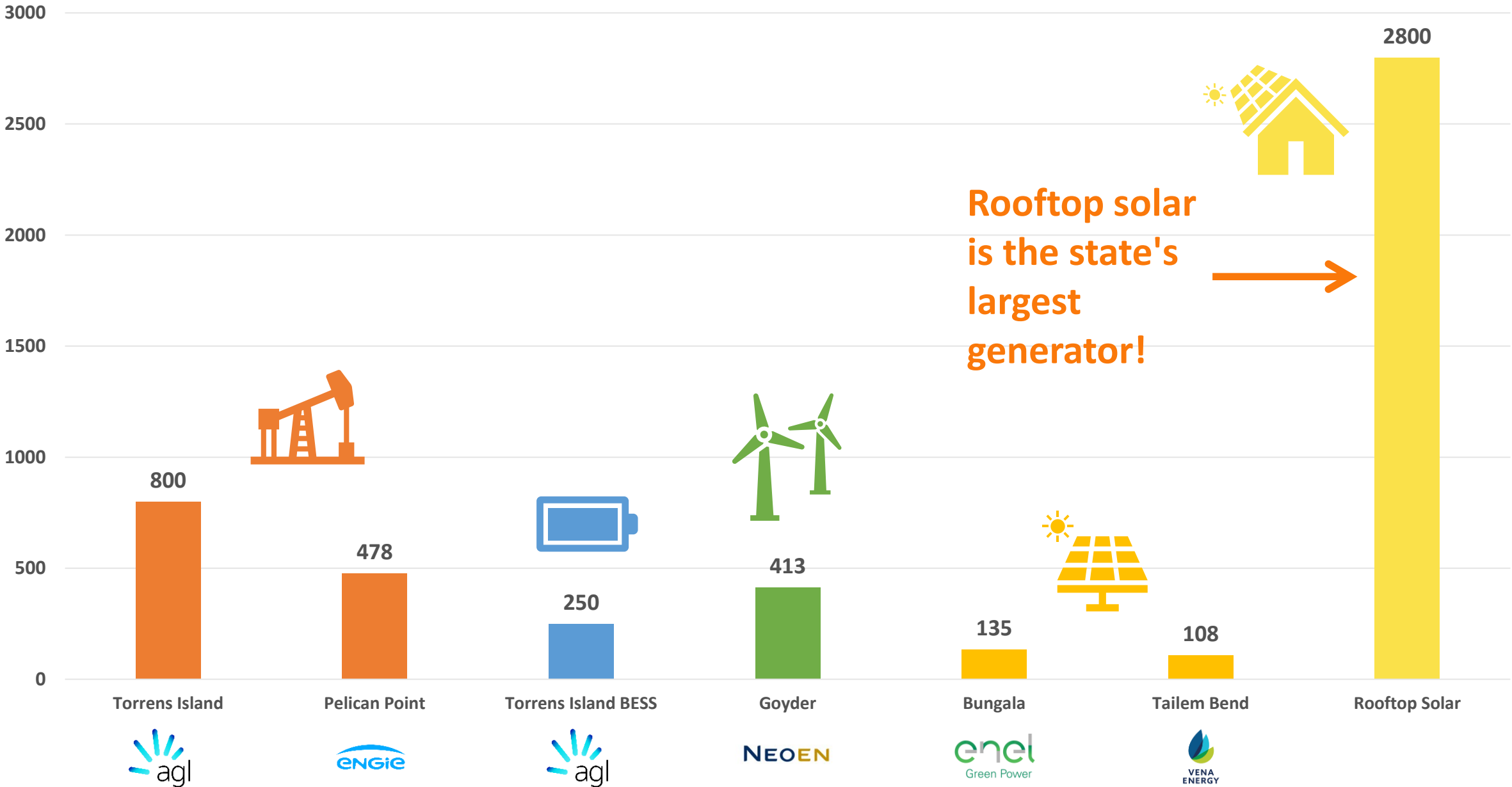
Generation
Gas, wind and solar
Generate electricity

Transmission
ElectraNet
Carry electricity
long distances

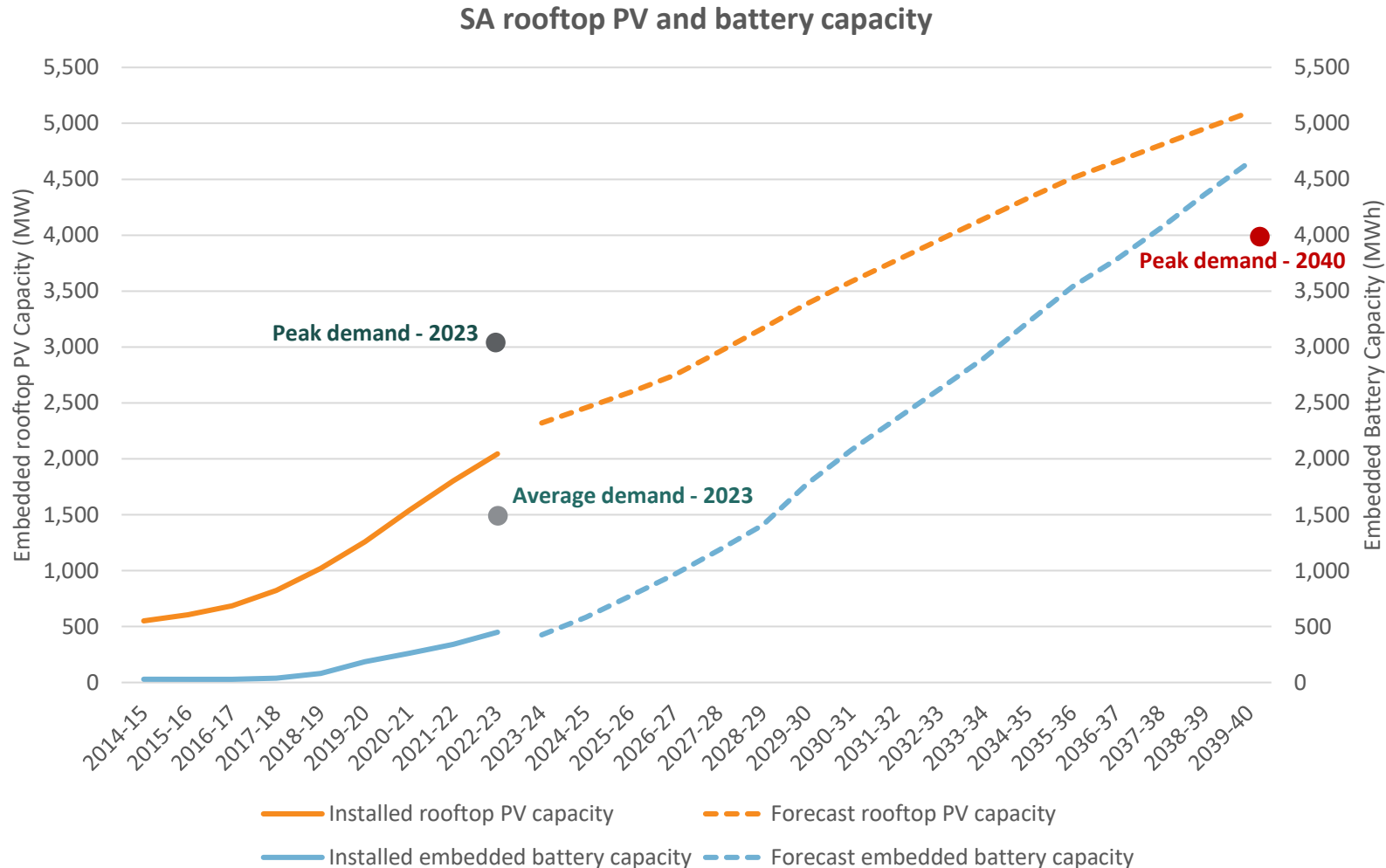
Distribution
SA Power Networks
Carry electricity to and
from customers

Retailers
Bill customers for all the
costs in getting electricity
to their home or business

Generators in South Australia (MW)



A global leader in Consumer Energy Resources (CER)




Source: 2023 AEMO IASR, SAPN


~370,000 solar PV systems

>1 in 3 customers

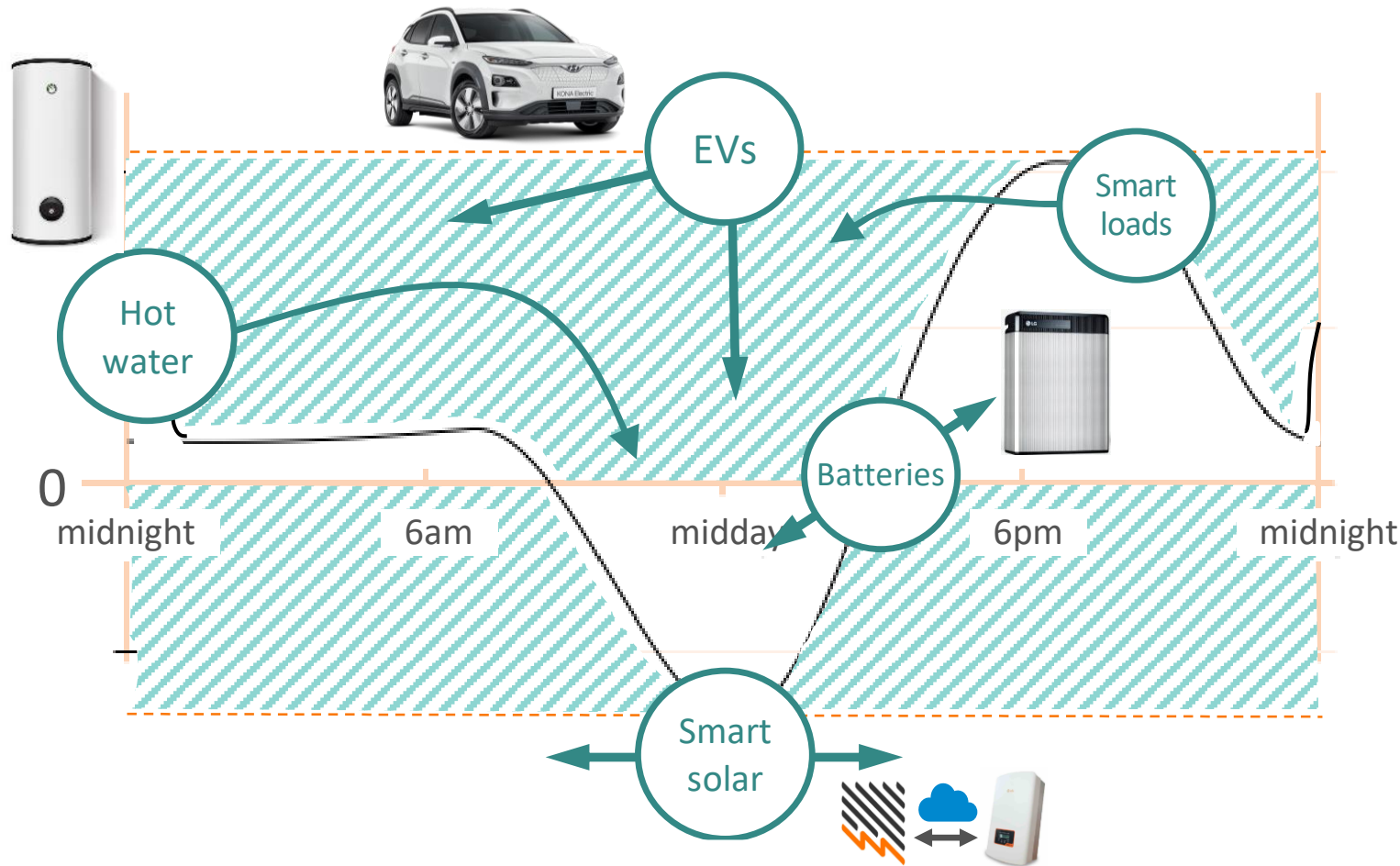
State's largest generator

Record growth continues


~49,000 home battery systems
(~500MWh)

18 different Virtual Power Plants in SA

The importance of flexibility



Enabling flexibility is key to an efficient renewable energy power system

- Our network has **tremendous spare capacity** outside peak times for new applications such as electrification
- We can unlock this capacity through encouraging demand side **'flexibility'**
- Managed well, this could **increase network energy throughput by 50%+** without the need for \$billions in capacity upgrades
- This provides the opportunity to **materially reduce electricity network prices & improve energy affordability**

Emerging trends to watch

Household & small commercial:

- Rooftop PV uptake
- Electric Vehicles
- Home battery systems
- Home energy management systems
- Electrification

Large Connections:

- Grid-scale BESS
- Larger industrial loads
- Data centres
- Hydrogen

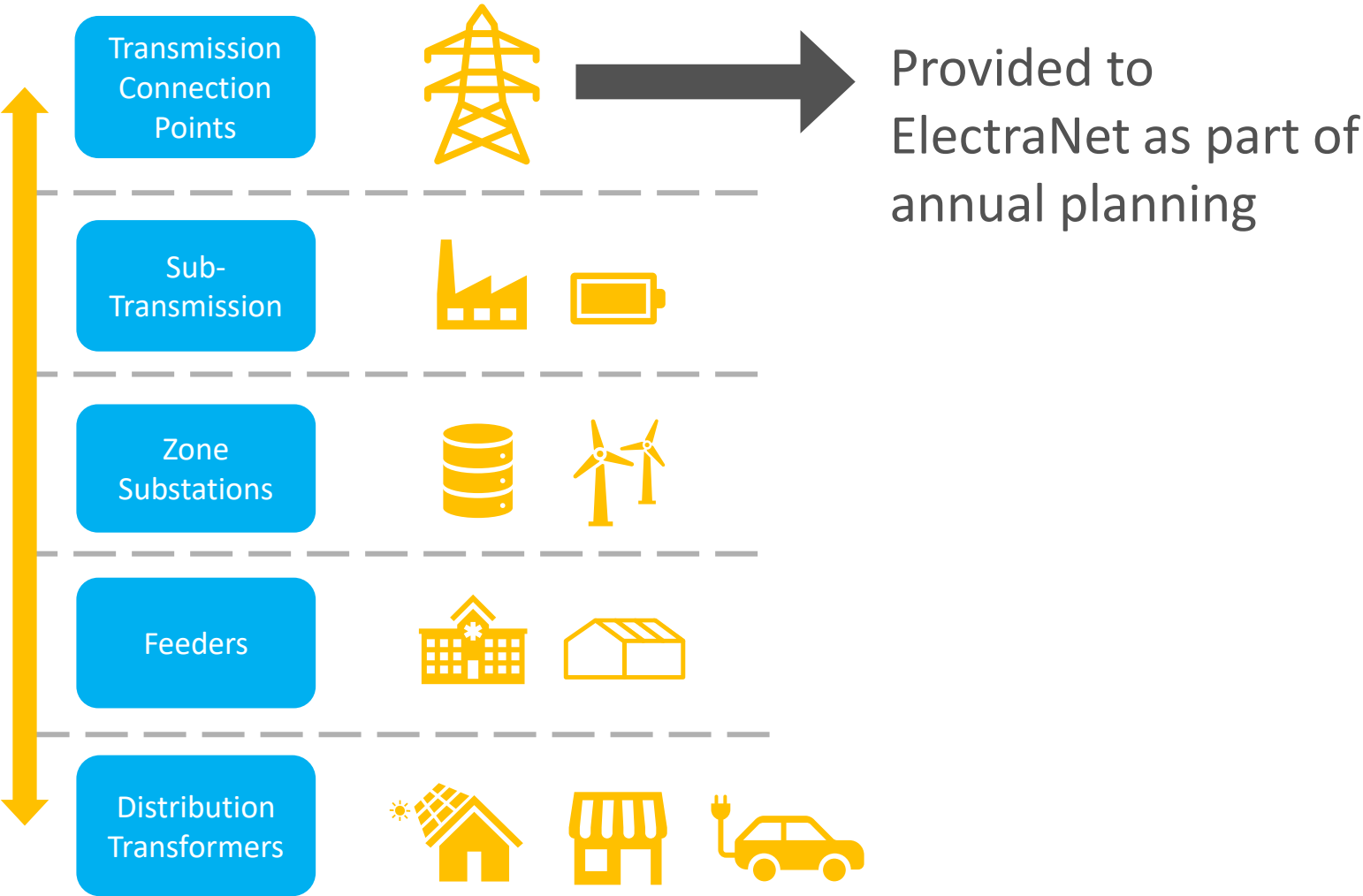
At all levels:

- Flexibility
- Reactive power behaviour



Forecast overview and ElectraNet input

Forecasts produced at all levels of the network, with differing levels of complexity, granularity, and cadence.



Large Industrial Connections

- Large Industrial Loads are **not included in our forecasts** unless the connection is committed.
- Speculative enquiries for connections in the 2025-30 period total **>500MW**, which is not included in published forecasts (primarily focussed in Metro Adelaide).
- Observed trends:
 - Large BESS connections (>20MW)
 - Data Centres connecting in other states, expect they will start connecting in SA.
 - Increased interest in very large connections, bigger than would typically connect to the distribution network.



Forecasting Initiatives

Capability uplift

- New forecasting tool being implemented this year. Will unlock much needed new forecasting capabilities.
- Focus on aligning demand drivers from household to transmission.

Coordination with government:

- Participating in the Upper Spencer Gulf pilot.
- Assisting DEM with SA demand forecast inputs as a member of the SA Electricity Development Plan Reference Committee.
- Coordinating with DHUD and PLUS to track growth areas across SA.

Wrap up & next steps

Simon Appleby +

Leanne Muffet

CAP only Session

Leanne Muffet

Thank you