

# Consumer Advisory Panel Meeting



26 November 2025

# Greetings

**Leanne Muffet**  
Independent Facilitator



# Meeting Agenda

For decision

TIME	ITEM	PRESENTERS
1. 9:30am (10 mins)	<b>Greeting + Acknowledgement of Country</b>	Leanne Muffet, (CAP Independent Facilitator)
2. 9:40am (20 mins)	<b>Approval of minutes, action items + general updates</b> <ul style="list-style-type: none"><li>• Action items and approval of minutes</li><li>• SAPN CAF/CAP Meeting</li><li>• Updates from ElectraNet</li><li>• CAP Annual Report</li></ul>	Leanne Muffet + Simon Appleby + Jeremy Tustin
3. 10:00am (15 mins)	<b>CAP Hot Topics</b>	All
4. 10:15am (15 mins)	<b>Demand Forecast Working Group</b>	Andrew Richards
5. 10:30am (10 mins)	<b>Revenue Reset Update</b> <ul style="list-style-type: none"><li>• Q&amp;A</li></ul>	Jeremy/Bec
6. 10:40am (10 mins)	Morning Tea/Break	
7. 10:50am (40 mins)	<b>NTx Update</b>	Brad Harrison, Ralf Riccardi, Jo Telfer
8. 11:30am (30 mins)	<b>Other Business &amp; Wrap Up</b> <ul style="list-style-type: none"><li>• CAP only session</li></ul>	Leanne Muffet

# Action Items

For noting

No	Action	Responsible	Status
1.	Leanne to send CAP agenda items for the Board to Alycia and Jeremy by 27 August 2025	LM	Complete <ul style="list-style-type: none"><li>Letter sent to Board</li><li>Response received</li></ul>
2.	ElectraNet coordinate with CAP members to confirm the site visit	AM	Complete
3.	ElectraNet to reassess its position on The Energy Charter membership and explore opportunities to voluntarily align with and report against the Charter's accountability framework and engagement KPIs.	CH	Ongoing <ul style="list-style-type: none"><li>Further explore in 2026</li></ul>
4.	Rebecca Knol to provide the Ernst & Young resource sector outlook report to support further discussion.	RK (LM / AM to follow up)	Pending
5.	ElectraNet to confirm joint CAF/CAP meeting with SA Power Networks	AM/CH	Complete <ul style="list-style-type: none"><li>Session held</li></ul>
6.	AM to follow up with Andrew Richards to arrange EUAA out-of-session meeting on the FERM.	AM	Pending

# CAP Hot Topics

All CAP Members

# Demand Forecasting- Working Group

**Andrew Richards**  
CAP Member

For  
discussion

# Update on CAP Demand Forecast Working Group

Andrew Richards  
on behalf of Working Group  
26 November 2025



# Project Overview + Key Objective

<b>Main Objective</b>	Seeking Independent Validation for ElectraNet Demand Forecasts
<b>Key Aim</b>	To commission an <u>independent review</u> of the key assumptions underpinning the ElectraNet demand projections.
<b>Strategic Rationale</b>	<ul style="list-style-type: none"><li>• Project delivery is deliberately timed to support the CAP in its <b>response to the Integrated System Plan (ISP)</b> in early 2026.</li><li>• Ensuring demand projections are reasonable, robust and validated by an external expert.</li></ul>
<b>Governance Overview</b>	<ul style="list-style-type: none"><li>• <u>Contractual/Funding Oversight</u>: ElectraNet</li><li>• <u>Content/Management</u> Working Group: Andrew, Leanne, Mark, Simon M</li><li>• Input from CAP as required</li></ul>

# Process + status update

- Working Group Status (formed Sept 2025)
- Developed Request for Quote
  - Input from ElectraNet
- Engagement to Date: Three formal Working Group meetings held since formation.
- Key Achievement
  - Supplier Engagement Imminent (Energy Quest)
  - The group has completed negotiations
  - Contract to be executed shortly

# Timeline

Early Nov  
2025

Issue RFQ to 3 x  
suppliers  
(approved by  
ElectraNet)

Mid – late  
Nov 2025

Engage preferred  
supplier

Mid - late  
Dec 2025

Project review  
point with  
supplier

Third week  
Jan 2026

Draft to WG

Early Feb  
2026

Final Report to  
WG + CAP

# Areas of growth

	B2B	Supply chain	ROI	E-commerce
Q1	4.5	2.3	1.7	5.0
Q2	3.2	5.1	4.4	3.0
Q3	2.1	1.7	2.5	2.8
Q4	4.5	2.2	1.7	70

For  
discussion

# Revenue Reset Update

**Jeremy Tustin**

Head of Regulation

**Bec Malhotra**

Manager Regulation

# Phase One Recap & Key Highlights

## FOUNDATIONAL ENGAGEMENT AND KEY TOPICS

### **Building a Strong Foundation**

Phase One focused on upskilling members for informed participation in the revenue reset process.

### **Key Regulatory Topics**

Covered the customer-centric regulatory model, AER objectives, revenue proposal building blocks, as well as a deeper dive on key topics such as pricing.

### **Cost Understanding**

Provided an informative session and factsheet on our scoping & estimating approach to asset replacement for transparency.

### **Spheres of Influence Framework**

Developed and refined bubble diagram to identify priority areas for RRRG's influence and impact.

# Meeting Overview and Pulse Check



## Engagement Sessions

RRRG held multiple sessions focusing on engagement plans, regulatory insights, Capex scoping, and setting expectations.



## Positive Feedback

Participants valued Capex discussions, transparent communication, and openness from ElectraNet staff.



## Areas for Improvement

Suggestions included inviting guest experts, clarifying outputs, and reducing repetitive meeting content.

# AER Milestone and Positive Developments

## Submissions of Framework and Approach

The Framework and Approach paper submission marks a key regulatory milestone.

## AER's Early Collaboration Commitment

AER has committed to early collaboration in 2026, promoting proactive engagement and alignment with ElectraNet's reset process.

## Consideration of Consumer Perspectives

Consumer perspectives will be integrated early, facilitating informed decision-making and constructive dialogue throughout the process.

# Looking ahead

## Finalising RRRG Objectives

Clarify RRRG's objectives by amending Terms of Reference to reflect genuine engagement and address consumer concerns.

## Shaping 2026 Engagement Approach

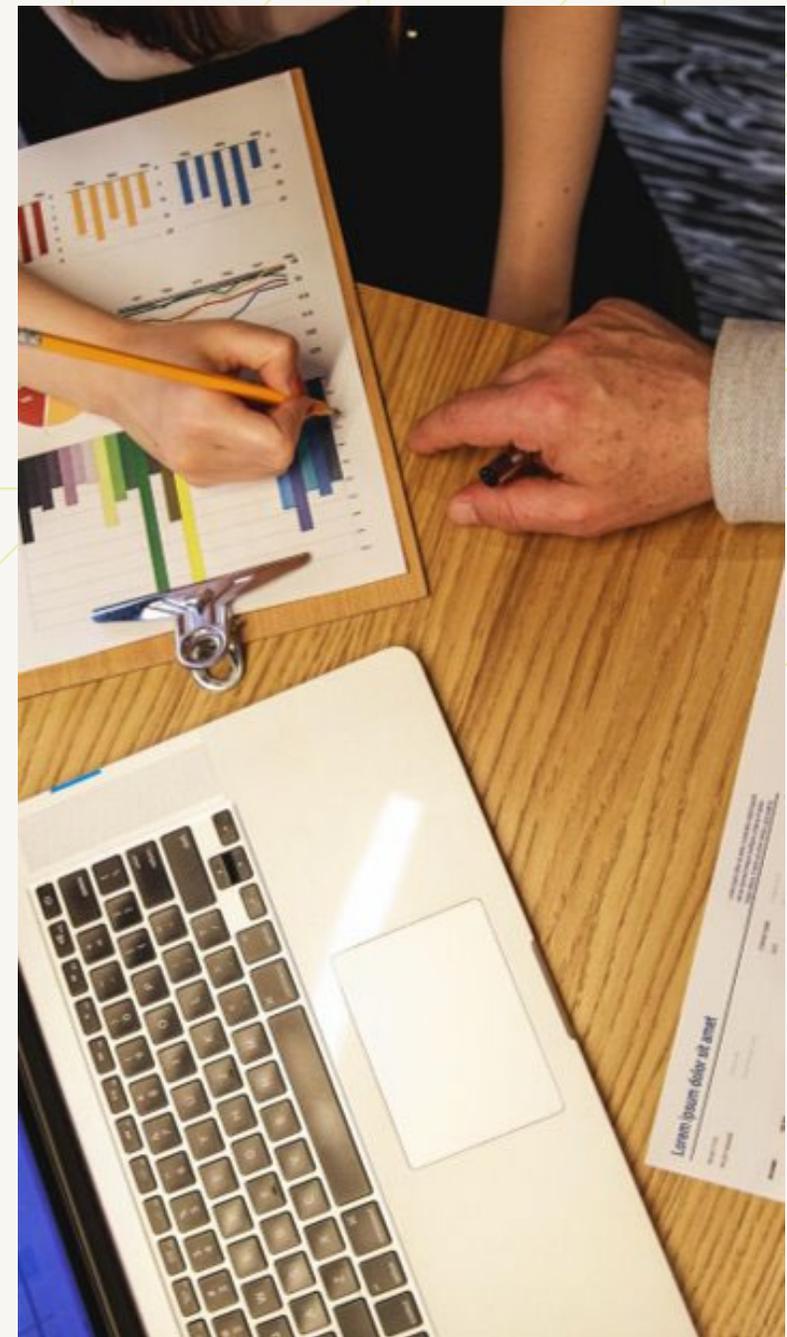
Use Preliminary Revenue Proposal drafts and bubble diagrams to guide iterative discussions and topic tracking. CAP and RRRG should start thinking now about the steps required to deliver the agreed outputs to reach the end goal.

## Reviewing Resourcing Needs

Assess resourcing requirements to ensure effective collaboration and support for RRRG in 2026.

## Open to Additional Items

Maintain flexibility by welcoming additional agenda items suggested by group members for future discussions.



For  
collaboration

# NTx Update PADR

**Brad Harrison**

Manager Network Planning

# The AER has granted an extension to the PADR until July 2026

Key reasons for the extension are:

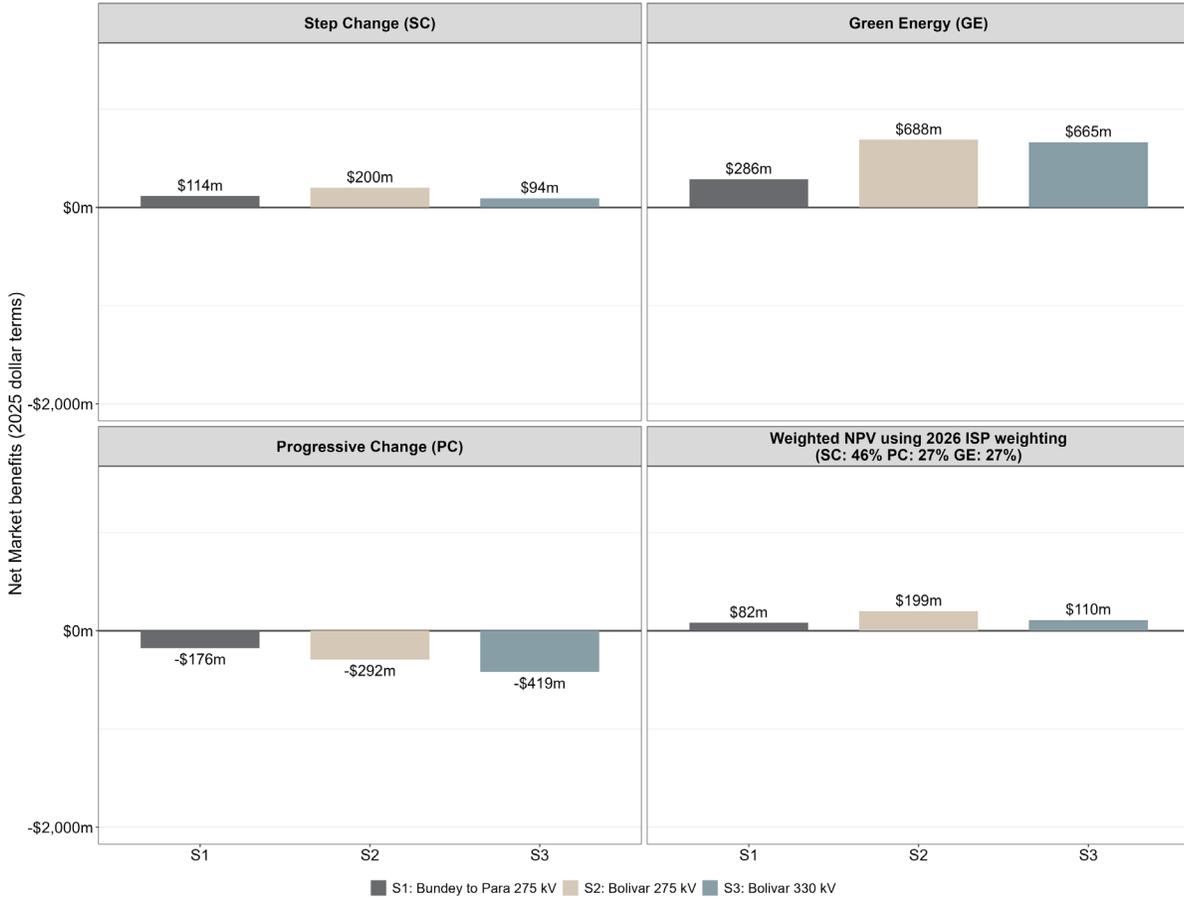
- Firm Energy Reliability Mechanism
- Rapidly evolving demand
- Increased engagement with CAP
- Route selection impacting on cost estimates
- Engagement with Non-network and potential funding through government grants impacting on cost/benefit analysis

# Houston Kemp find weighted net market benefits

Analysis indicates that NTx delivers net market benefits to consumers in the Step Change scenario.

- The scale of the benefit depends on the scenario.

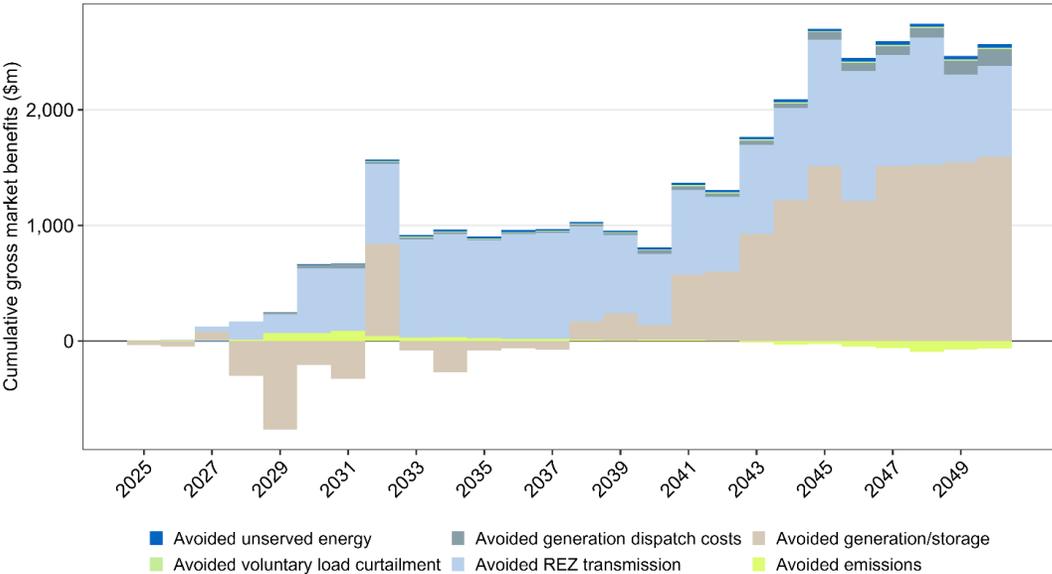
S2 is preferred for the Southern Options



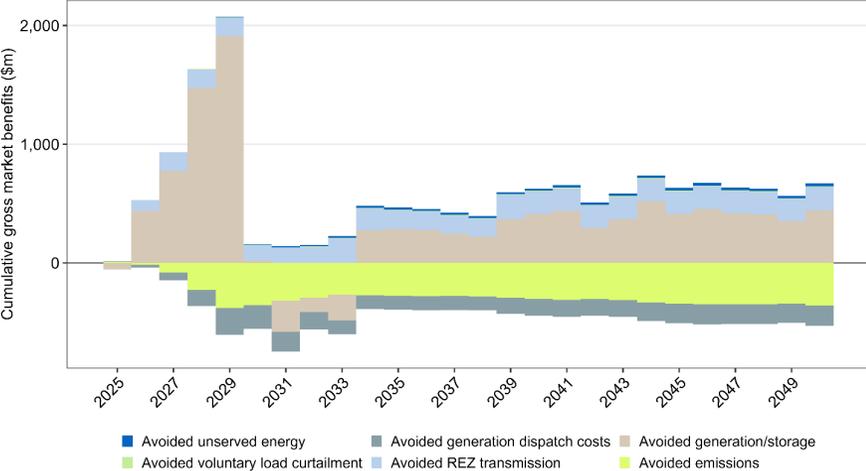
# Gross benefits show similar trends with differing magnitudes

Increasing access to the mid-north reduces capital investment in renewables across the NEM, including other REZ transmission

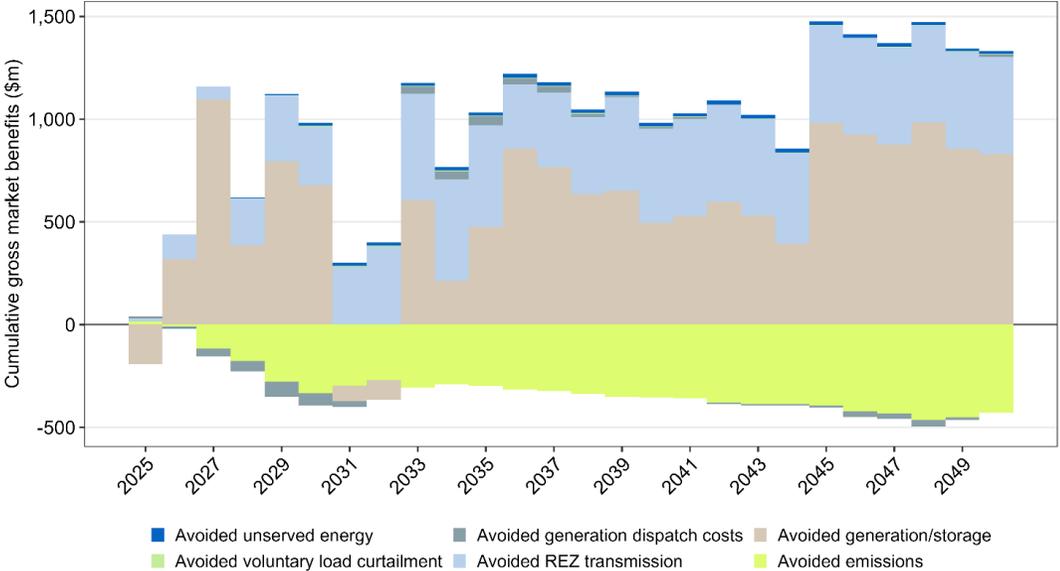
Option S2 under the *Green Energy Exports*



Option S2 under the *Progressive Change*

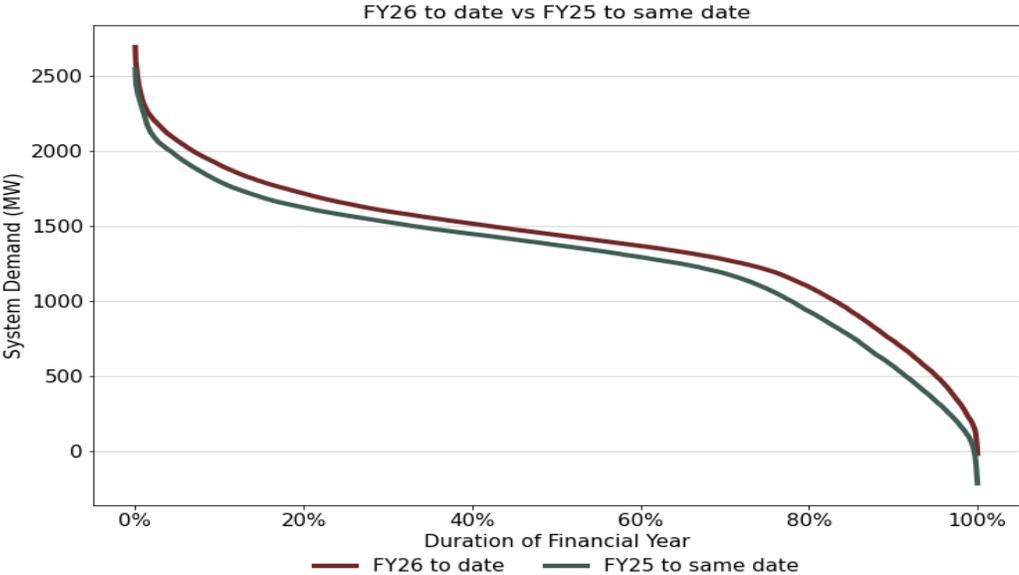


Option S2 under the *Step Change* scenario



# Progressive change weighs on the decision, yet year-on-year demand growth continues to be observed

Scenario weightings have been updated, we will report on the effects under the new weightings but will be bound by the 2024 ISP until the Final 2026 ISP.



Green Energy Exports	Step Change	Progressive Change
15%	43%	42%
Accelerated Transition	Step Change	Slower Growth
27%	56%	27%

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collaboration

# NTx Update ISP Status

**Brad Harrison**

Manager Network Planning

# AEMO's Draft ISP finds that NTx requires further analysis

## Changes from the previous ISP include

- Gas and distribution have been included in the ISP for the first time
- South Australian government's Firm Energy Reliability Mechanism (FERM)
  - Tenders close on 28 November.
- Federal Capacity Investment Schemes

## We continue to remain concerned regarding interstate policies distorting outcomes

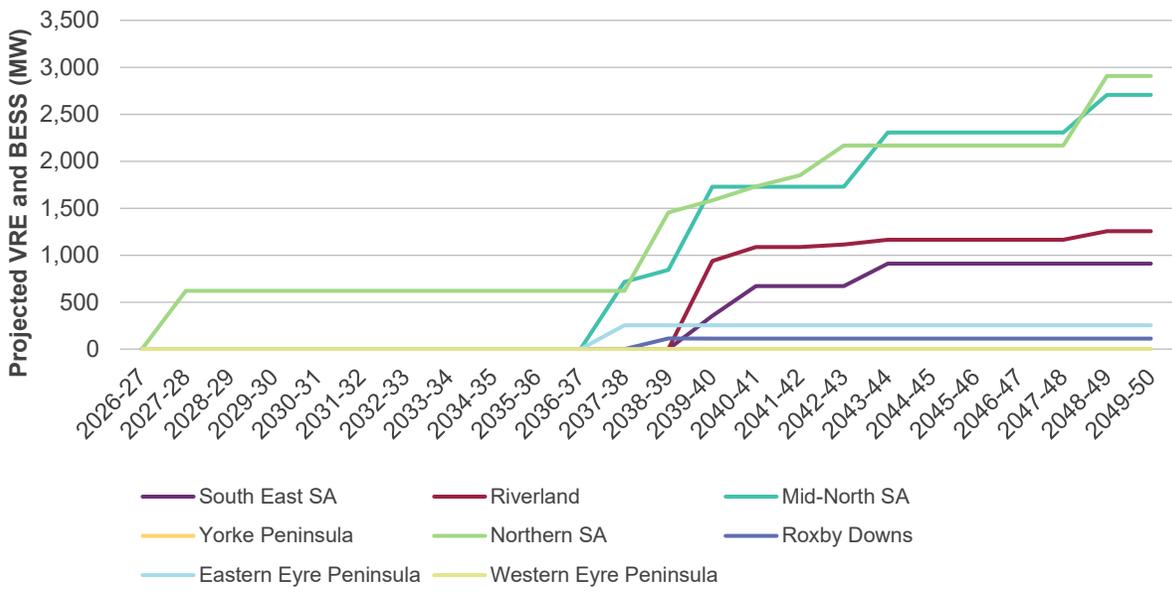
- Offshore wind in Victoria
- 200% renewables in Tasmania

# We are working with AEMO between now and the Final ISP to understand the results.

We are seeking to understand how the project is not on the Optimal Development Path

- Step Change forecasts 8 GW of new renewables by 2050 (chart on the right)
  - Not much in the 2030s
  - Lots around 2040
- BESS investment of 3.1 GW driven by
  - Firm Energy Reliability Mechanism
  - Capacity Investment Scheme (CIS)
- No further investment in wind generation until 2040
  - We have GW scale projects across the state
- Minimal investment in solar and only solar until 2040

South Australia utility-scale VRE development in REZs for Step Change (MW)



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collaboration

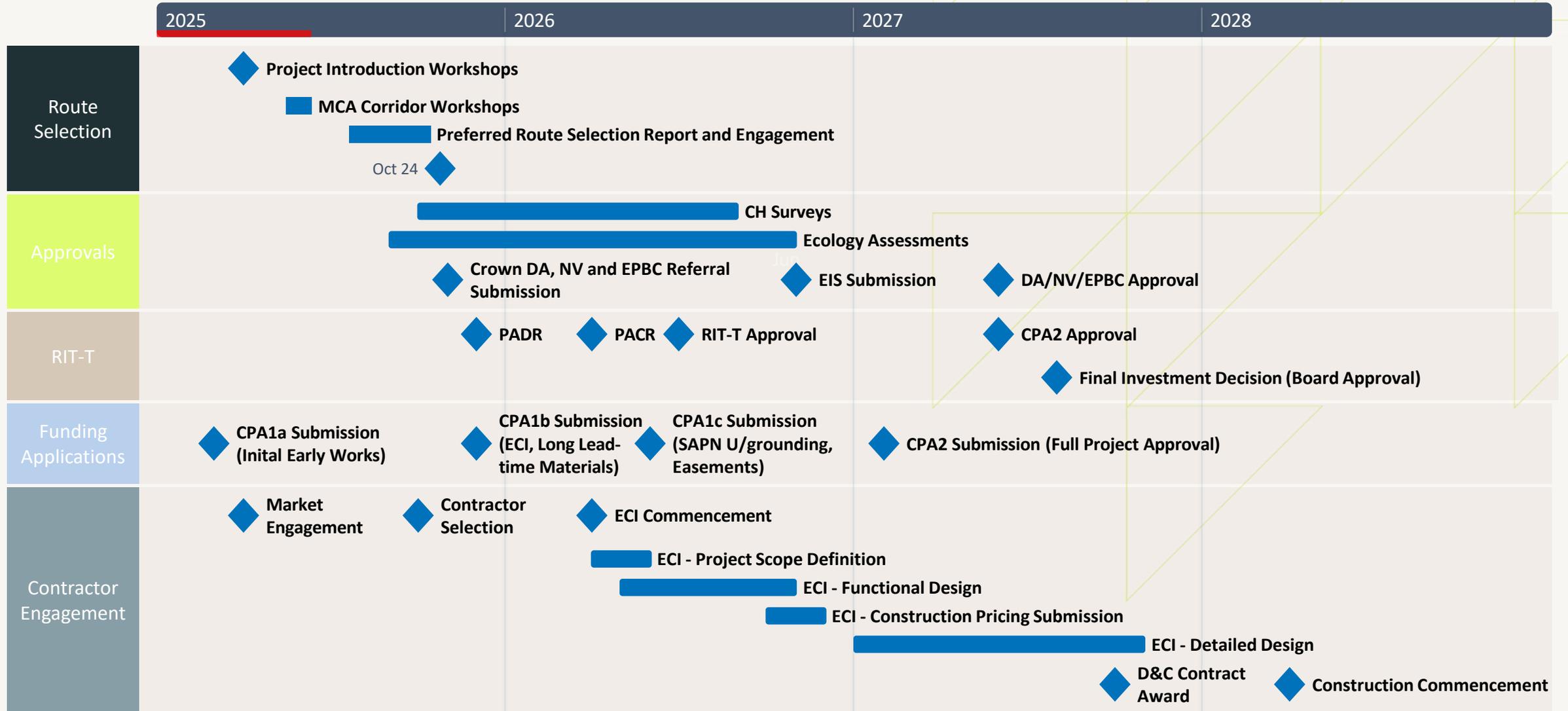
# NTx Update CPA1b funding Options

**David Tansell**  
Project Director

# CPA1b options

	Option 1 - Low	Option 2 - Medium	Option 3 - High
CPA1b Submission Dec 2025	nil	\$40m-\$50m	\$150m
CPA1b Submission April 2026 (aligned to PADR Submission)	\$40m-\$50m, or \$150m (decision pending)	Balance of \$150m	nil
Project timeline implications	Introduces delays ~ 6-12 months	Minimises impact ~ 0-6 months	nil
Risks	May negatively impact community engagement activities	Requires multiple submissions	Funding request submitted before certainty of benefits
	Incurs project delays	Locks in moderate cost for consumers	Locks in higher cost for consumers
	May lose future project optionality, social licence and easements not available in future if required		
Benefits	Increases certainty of benefits before further funding approvals	Maintains balance between certainty and project progress	Maintains current schedule
	Defers locking in cost for consumers, aligned with benefits	Allows key activities to continue, maintains momentum	Keeps community engaged
		Keeps community engaged	Maintains easement acquisition activities
		Maintains easement acquisition activities	Locks in Contractor resource
		Locks in Contractor resource	Retains future project optionality, secures easements
		Retains future project optionality, secures easements	

# Indicative Project Schedule - Milestones



For  
collaboration

# NTx Update Engagement

**Jo Telfer**

Engagement Lead

# Our Engagement was extensive!



# What we heard – key themes

A detailed *What We Heard* report is being developed for release in early 2026. Some of the key themes we heard include:

- Minimise impacts on high-value agricultural land, particularly cropping land and impacts on farming operations
- Concerns around environmental and biodiversity impacts
- Avoiding homes and townships
- Bushfire risks
- Health and safety concerns, including mental health
- Land values and compensation
- Visual amenities, tourism and heritage

# What we did with the feedback

- We have shifted the focus of our investigations in NTx South to include new areas east of the existing four corridor options, in an effort to minimise impacts to high yield cropping land
- While our engagement was extensive, some people in these new areas may not have participated
- So we've begun early conversations with landholders, traditional owners and local businesses to better understand land use, values and priorities
- No decision on a preferred corridor for NTx South will be made until all feasible options have been thoroughly investigated
- A decision on a preferred corridor for NTx South is expected in early-mid 2026

For  
discussion

# Other Business & Wrap Up

Leanne Muffet & Simon Appleby

# 2026 CAP meeting dates

- Thursday, 19 February 2026 – 9:30am – 1:00pm
- March TBA SAPN CAF/CAP
- Thursday, 28 May 2026– 9:30am – 1:00pm
- Thursday 27 August 2026– 9:30am – 1:00pm
- Thursday 26 November 2026 – 9:30am – 12:00pm – then Board Lunch

## Consumer Advisory Panel Membership

**Mark Henley**  
Consumer Representative



**Leanne Muffett**  
Independent Chair

**Craig Wilkins**  
Consumer Representative



**Simon Maddocks**  
Primary Producers SA



**Andrew Richards**  
Energy Users Association Australia



**Vikram Kenjle**  
University of Adelaide



**Kelly-Anne Saffin**  
Cross Border Commissioner



**Cathi Buttfield**  
South Australian Business Chamber



**Georgina Morris**  
South Australian Council of Social Services



**Greg McCarron**  
Central Irrigation Trust

**Thank you**