

Analysis of small business retail energy bills in Australia

Final Report, June 2021

Small and Medium Enterprise (SME) Retail Tariff Tracker Project

Prepared by Alviss Consulting, with Energy Consumers Australia



Disclaimer

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

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

Contents

The Small Business Tariff-Tracking Project: Purpose and outputs	1
1. Key Findings	2
2. Methodology and caveats	4
2.1 Energy bill analysis and factors influencing price	5
2.2 Types of businesses and consumption levels	5
2.3 Consumption levels used for this analysis	5
2.4 Bill calculations	6
3. National comparison of energy bills	6
3.1 Electricity bills	7
3.1.1 Maximum price spread – electricity	9
3.1.2 Additional discounts – electricity	9
3.1.3 Fixed supply charge – electricity	10
3.1.4 Electricity network charges	11
3.1.5 Electricity ‘bill-stacks’	13
3.1.6 Impact of the Default Market Offer (DMO) and Victorian Default Offer (VDO)	15
3.1.7 Broader market impacts from re-regulation	18
3.2 Gas bills	19
3.2.1 Maximum price spread – gas	20
3.2.2 Additional discounts – gas	21
3.2.3 Fixed supply charge – gas	22
4. Jurisdictional analysis	23
4.1 New South Wales	23
4.1.1 NSW electricity bills April 2021	24
4.1.2 NSW gas bills April 2021	29
4.1.3 Changes in energy bills in NSW	32
4.1.4 Impact of the DMO	35
4.2 Victoria	37
4.2.1 Victorian electricity bills April 2021	37
4.2.2 Victorian gas bills April 2021	45
4.2.3 Changes in energy bills in Victoria	53
4.2.4 Impact of the VDO	56
4.3 Queensland	59
4.3.1 Queensland electricity bills April 2021	59
4.3.2 Queensland gas bills April 2021	63
4.3.3 Changes in energy bills in Queensland	64
4.3.4 Impact of the DMO	66
4.4 South Australia	67
4.4.1 South Australian electricity bills April 2021	67
4.4.2 South Australian gas bills April 2021	69
4.4.3 Changes in energy bills in South Australia	71
4.4.4 Impact of the DMO	72
4.5 Tasmania	74
4.5.1 Tasmanian electricity bills April 2021	74
4.5.2 Tasmanian gas bills April 2021	75
4.5.3 Changes in energy bills in Tasmania	76
4.6 Australian Capital Territory (ACT)	78
4.6.1 ACT electricity bills April 2021	78
4.6.2 ACT gas bills April 2021	80
4.6.3 Changes in energy bills in the ACT	81
4.7 Western Australia and Northern Territory	83
4.7.1 Western Australia and Northern Territory electricity bills April 2021	83
4.7.2 Western Australian gas bills April 2021	83
4.7.3 Changes in energy bills in WA and NT	85
Appendix A - List of energy offers used in the analysis	87

The Small Business Tariff-Tracking Project: Purpose and outputs

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

To date this project has collected and compared small business electricity and gas retail tariffs across Australia and developed a spreadsheet-based tool that allows consumer advocates, and other interested parties, to compare prices and produce their own analysis. Workbooks, which allow the user to enter consumption levels and analyse bills for electricity and gas market offers available to small business customers as of April 2016, April 2017, October 2017, April 2018, October 2018, April 2019, October 2019, April 2020, October 2020 and April 2021, have been developed for each jurisdiction.¹ While every update of the workbooks will be accompanied by a report, we stress that the workbooks themselves are integral to this project and can be accessed at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The analysis presented in this SME Retail Tariff Tracker project update report is based on retail offers available in October 2020 as well as those collected in April 2021 as well as those collected in October 2020, April 2020, October 2019, April 2019, October 2018, April 2018, October 2017, April 2017 and April 2016. The consumption levels of 20,000 kilowatt hours for annual electricity consumption and 100 gigajoules for annual gas consumption used for comparing changes in annual bills in this update report reflect feedback received on the SME Retail Tariff-Tracker: Preliminary Report (October 2017) and are consistent with those used for the previous update-report (December 2017, June 2018, December 2018, June 2019, December 2019, June 2020 and December 2020).² Readers interested in more background information about SME energy customers, contract and tariff types may also want to refer to the Preliminary Report.

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

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

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

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

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

1. Key Findings

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

SME ENERGY BILLS AND ANNUAL PRICE CHANGES

- A jurisdictional comparison of SMEs consuming 20,000 kWh per annum shows that **South Australian businesses continue to have the greatest annual electricity bills (\$7,215)** while Queensland businesses continue to have the lowest \$5,190). **See section 3.1.**

- On average, nationally, annual electricity bills for SMEs with this consumption level **decreased by approximately \$270 or 4% between April 2020 and April 2021.** The greatest decreases in annual electricity bills are in Victoria (\$875) while businesses in the Western Australia had increases (\$230). **See section 3.1.**

- A jurisdictional comparison of SMEs consuming 100 GJ of gas per annum shows that **Tasmanian businesses continue have the greatest annual gas bills (\$4,740) and Victorian businesses have the lowest \$2,145.** **See section 3.2.**

- **On average, nationally, annual gas bills decreased by 2% between April 2020 and April 2021.** On a jurisdictional level however, annual gas bills for SMEs with this consumption level (100 GJ) have increased by \$140 (4%) in South Australia. In New South Wales and the ACT, on the other hand, they have decreased by \$225 (8%) and \$200 (6%). **See section 3.2.**

IMPACT OF REGULATED OFFERS

- The initial regulated Default Market Offers (DMOs) in NSW, South Australia and South East Queensland took effect on 1 July 2019 and were adjusted on 1 July 2020. In Victoria, the initial Victorian Default Offer (VDO) took effect on 1 July 2019 and was adjusted on 1 January 2020 and 1 January 2021. All SMEs that were on a retailer's standing offer prior to the introduction of the DMO and VDO were moved to the DMO or VDO. **See section 3.1.6.**

- In Victoria, the average VDO decreased by 14% on 1 January 2021. **On average, the current VDO is 33% lower than the standing offers prior to the initial VDO taking effect in Victoria.** The DMO has remained unchanged since July 2020 (new rates will take effect in July 2021). **In NSW and South East Queensland, the DMO is 10% lower than the standing offers prior to the initial DMO and in South Australia it is down by 16%.³ See section 3.1.6.**

- In terms of broader market impacts since the introduction of the DMO/VDO, this analysis has found that:

- The number of retailers has increased significantly in NSW, South East Queensland and South Australia while it has **remained the same** in Victoria
- The use of additional discounts continues to decrease
- A lower proportion of offers have conditions such as set contract terms and limited 'benefit periods'
- A significant proportion of offers are now conditional upon the customer receiving monthly bills
- For more details, **see section 3.1.7.**

³ Based on the 'big 3' retailers' standing offers prior to DMO/VDO taking effect on 1 July 2019 and the current (July 2020) DMO prices for small businesses consuming 20,000 kWh per annum.

PRICE-SPREADS

- The difference between the lowest and highest market offer, the maximum price-spread, has increased in all jurisdictions except Victoria over the last year. **In April 2021 the maximum price-spread in Victoria was approximately \$1,355, \$2,140 in NSW, \$1,775 in South East Queensland, \$2,475 in South Australia and \$740 in the ACT.**⁴ [See section 3.1.1.](#)

- The price-spread for gas decreased in the ACT and Victoria compared with the same period a year ago. For NSW, in particular, the price-spread has increased. **As of April 2021, the maximum price-spread was \$760 in NSW, \$640 in South Australia, \$455 in Victoria, \$350 in the ACT and \$260 in Queensland. In Tasmania, the maximum price-spread was \$110.**⁵ [See section 3.2.1.](#)

ADDITIONAL DISCOUNTS

- Compared to six months ago (October 2020), **the level of discounting has reduced in Victoria and South East Queensland, increased in South Australia and remained unchanged in other jurisdictions.** Additional discounts applied to electricity offers have the greatest impact in NSW (reduces a typical annual bill by approximately \$390) while they have the least impact in Tasmania (approximately \$150).⁶ [See section 3.1.2.](#)

- **In relation to gas offers, some retailers offer guaranteed discounts while none of the gas offers currently contain conditional pay on time discounts. Discounts have greatest impact in Western Australia (reduces an average annual bill by approximately \$985) while they have the least impact in South Australia, Queensland and Victoria.**⁷ It should be noted, however, that Western Australia only has three retailers that publish SME market offers and that this discount reflects the 45% discount offered by AGL and 32% discount offered by Origin Energy. [See section 3.2.2.](#)

FIXED SUPPLY CHARGES

- **Over the last year, fixed supply charges have decreased in the ACT, NSW, South Australia, Tasmania and Victoria, while they have remained unchanged in the Northern Territory.** Western Australia used to have relatively low supply charges but in July 2018 it increased considerably (by \$440 per annum) and it is now the highest supply charge in the country (\$671 per annum). Annual fixed supply charges are \$569 in NSW (decrease of 5%), \$423 in Victoria (decrease of 8%), \$514 in Queensland (increase of 2%), \$483 in the ACT (decrease of 2%), \$375 in Tasmania (decrease of 1%) and \$373 in South Australia (decrease of 3%). The supply charge is lowest in the Northern Territory (\$292). [See section 3.1.3.](#)

- Compared with the same period a year ago, **fixed gas supply charges have decreased in the ACT (7%). In Queensland, Tasmania and Victoria, the supply charges have increased by a modest 1% to 2% since April 2020.** Fixed supply charges as a proportion of the annual bill are highest in the ACT (18%) and lowest in Western Australia (4%). [See section 3.2.3.](#)

ELECTRICITY NETWORK CHARGES

- **Compared with the same period a year ago, the Network Use of System Charges (NUOS) decreased in Victoria (18%), South Australia (2%) and Tasmania (6%). In NSW and the ACT, on the other hand, they increased by 2%. In Queensland they increased by 1%.** As of April 2021, South Australia is the jurisdiction with the highest NUOS charges (approximately \$3,190 for SMEs consuming 20,000 kWh per annum) while Tasmania has the lowest (approximately \$1,960 for the same consumption level).⁸ With the recent price reduction in Victoria, the annual average NUOS charge is now the second lowest at \$1,980. [See section 3.1.4.](#)

⁴ Based on annual consumption of 20,000 kWh and as of October 2020 the analysis is based on 7 retail offers in the ACT, 21 retailers South Australia, 25 in South East Queensland, 30 retailers in NSW and 21 in Victoria.

⁵ Based on annual consumption of 100 GJ and analysis based on 9 retail offers in Victoria, 8 retailers in NSW and South Australia, 5 in Queensland, 4 in the ACT and 2 retailers in Tasmania. Analysis does not include WA as AGL and Origin are relatively new entrants in the WA gas retail market. As of April 2021, however, the maximum price-spread in WA was \$1,730..

⁶ Jurisdictions without market offers have not been included in this analysis. For Queensland, it is based on market offers in South East Queensland (Energex network) only.

⁷ Jurisdictions without or only a few market offers have not been included in this analysis.

⁸ Based on annual consumption of 20,000 kWh

- Since April 2016 (when the SME Retail Tariff Tracker project commenced) there was first a trend decline in NUOS as proportion of the total retail bill in all jurisdictions. Since April 2020, however, the NUOS proportion has increased in all NEM jurisdictions except Victoria and Tasmania. **In April 2021 the NUOS proportion of bills was highest in the ACT and South Australia (46.1% and 44.1%, respectively. See section 3.1.4.**

ELECTRICITY BILL-STACKS

- In order to examine what businesses actually pay for the various goods, services and policies that are costed by the supply chain and passed on to consumers in a retail bill, we deduct estimated cost components from the average annual retail bill for businesses using 20,000 kWh per annum as of April 2021.⁹ **The residual retail component of the average market offer bill is zero in the ACT and as high as 21% in Tasmania.**¹⁰ The ‘green scheme’ component is highest in the ACT (17%) and lowest in NSW (8%). **The cost of wholesale energy ranges from 31% in Queensland, South Australia and Tasmania to 36% in Victoria. That is a significant reduction to wholesale costs compared to a year ago when it was estimated to count for over 40% of bills in all jurisdictions except Tasmania. See section 3.1.5.**

JURISDICTIONAL ANALYSIS

- Section 4 of this report analyses and compares electricity and gas offers available to small business customers in each of the jurisdictions. It compares price-spreads (maximum price differences between retail offers) and assesses the impact guaranteed and conditional pay on time discounts have on energy bills. It also examines changes to network cost and estimates the network cost proportion of total electricity bills. Furthermore, it highlights price changes (increases and/or decreases) that have occurred over the previous six months,¹¹ differences to annual bills (based on assumed consumption levels) between retailers, as well as electricity networks and gas pricing zones within each jurisdiction.

- There are significant differences between the various retailers’ bills, use of additional discounts and network charge proportion of bills across jurisdictions.

- **Both Victoria and South Australia experienced a significant reduction in electricity wholesale prices in 2020¹² but only Victorian SMEs have benefited from reduced retail bills over the last six months (since October 2020).** In Victoria, new network tariffs took effect in January 2021 meaning that the electricity retail prices have been affected by an underlying price reset in this six-month period. Most of the retailers have thus changed their offers (rates, discounts or both). In South Australia, the underlying network tariffs have not changed over the last six months. However, retailers can still change their offers, and they often do, but there has been minimal change in South Australia since October 2020. In fact, only one retailer (Origin Energy) has changed, slightly reduced, its offer over the last six months.

⁹ To estimate wholesale and environmental (‘green-scheme’) costs we used the AEMC, Residential Electricity Price Trends 2020, Data available at <https://www.aemc.gov.au/news-centre/data-portal/price-trends-2020>

¹⁰ A zero-residual amount in the ACT does not mean that the retailers do not have costs or a margin in this jurisdiction. It can, however, indicate that the retail costs/margins are lower in the ACT compared to other jurisdictions.

¹¹ As the last data collection of retail offers occurred in April 2021, offers as of April 2021 have been compared to offers as of October 2020 (the previous data collection).

¹² See AER, Wholesale Markets Quarterly, Q4 2020, October – December, February 2021

2. Methodology and caveats

2.1 Energy bill analysis and factors influencing price

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

Firstly, energy bills are made up of three key components: competitive market costs, network costs and 'green scheme' costs. According to the Australian Energy Regulator (AER), the wholesale costs account for 33% of residential customers' electricity bills, the regulated network cost is 43%, retail (costs and margins) is 16%, and 8% are 'green scheme' costs.¹³ For gas, the wholesale component accounts for 33% of the total bill, network cost is 43%, and retail (costs and margins) is 25%.¹⁴

The regulated electricity network costs include transmission use of system charge and distribution use of system charges, as well as the cost of meters, meter reads and other ancillary services.¹⁵ The role of retailers is to manage the risk of the wholesale market and thus offer energy products suitable to end-users. All these components influence changes to energy costs and customers' bills. For example: generation costs vary according to fuel sources used, and supply and demand; transmission and distribution costs can go up due to approved network upgrades; retail costs or pricing strategies will be influenced by how well the retailer has managed risk (i.e. their hedging contracts) and effectiveness of competition and other cost inputs the retailers have to manage.

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

2.2 Types of businesses and consumption levels

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

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

2.3 Consumption levels used for this analysis

In order to make a national comparison of electricity and gas bills we have chosen a standard annual consumption level of 20,000 kWh per annum, with the same rate charged for usage all day (which is termed the single rate). For gas we have used a standard annual consumption level of 100 GJ per annum.¹⁶ The 20,000 kWh electricity consumption is based on a (rounded) average of average consumption for

¹³ Note that these are NEM averages and that the 'bill-stack' does vary between jurisdictions. Also, while the AER analysis is based on residential customers, the breakdown is similar for SMEs. AER, *State of the Energy market 2020*, Figure 6.2, 240.

¹⁴ Ibid, Figure 6.3, 241. Note that the AER states that percentages may not add to 100% due to rounding.

¹⁵ Note that the competition in metering rule (introduced in December 2017) made extensive amendments to metering-related arrangements in the NEM, including transferring metering related roles and responsibilities from the distributors to metering coordinators.

¹⁶ Feedback received on our preliminary report (October 2017) included that previous assumptions used for consumption levels were too high for most networks and that using different consumption levels for the jurisdictions made the analysis unnecessarily confusing.

small businesses in various NEM networks by Jacobs Australia for the Australian Energy Market Operator (AEMO) presented in Table 1 below. We arrived at the 100 GJ gas consumption after receiving feedback that the previous assumption of 250 GJ was too high for all jurisdictions except Victoria.

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

TABLE 1 | Estimated average consumption and typical tariff types for selected NEM network areas¹⁷

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

In terms of tariff types, the single rate, the tariff type used for this analysis, is the most common for small businesses in all network areas except Energex, Powercor and South Australian Power Network (see table 1). Finally, we would encourage anyone with interest in energy bill analysis of different tariff types and/or consumption levels to use the small business SME Retail Tariff Tracker project workbooks available at: <https://energyconsumersaustralia.com.au/publications/our-research/page/3>.

2.4 Bill calculations

Energy offers are made up of numerous rates and charges (i.e. peak rates, off peak rates and supply charges) and in order to compare offers, or prices, we have based the analysis on estimated annual bills for certain consumption levels. Annual bills, inclusive of guaranteed discounts, pay on time discounts and GST, have been calculated for all retail offers.¹⁸ When the report refers to the average bill for a jurisdiction or a network, it refers to the average (arithmetic mean) bill based on all relevant retailers. The average bill is not weighted to reflect individual retailers' customer numbers.

¹⁷ Table based on Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017. Note that Powercor has advised that their most common small business tariff is the ND1 (single rate) and not ND5 as per Table 1.

¹⁸ Appendix A contains a list of all offers used for this report.

3. National comparison of energy bills

This section analyses and compares electricity and gas offers available to small business customers in Australia, based on available retail offers as of April 2016, April 2017, October 2017, April 2018, October 2018, April 2019, October 2019, April 2020, October 2020 and April 2021. The analysis highlights changes to energy bills, jurisdictional differences to annual bills (based on assumed consumption levels) as well as electricity networks, differences in the fixed supply charges and the impact guaranteed and conditional pay on time discounts have on energy bills in various areas. It also estimates the size of the network, wholesale, 'green schemes' and retail components of electricity bills. As the electricity Network Use of System (NUOS) charges change on 1 January in Victoria and on 1 July in all other jurisdictions, the April data, and associated report, will typically reveal recent price changes in Victoria while the October data (and report) will highlight major price changes in the other jurisdictions. That said, there are minor changes to most of the competitive energy retail markets throughout the year, and the six-monthly update approach ensures that both major and minor price resets in each jurisdiction are covered.

3.1 Electricity bills

Chart 1 shows estimated annual electricity bills for SMEs that consume 20,000 kWh per annum across all states and territories. South Australian businesses with this consumption level will typically have an annual electricity bill of approximately \$7,215, while Queensland businesses will pay \$5,190.

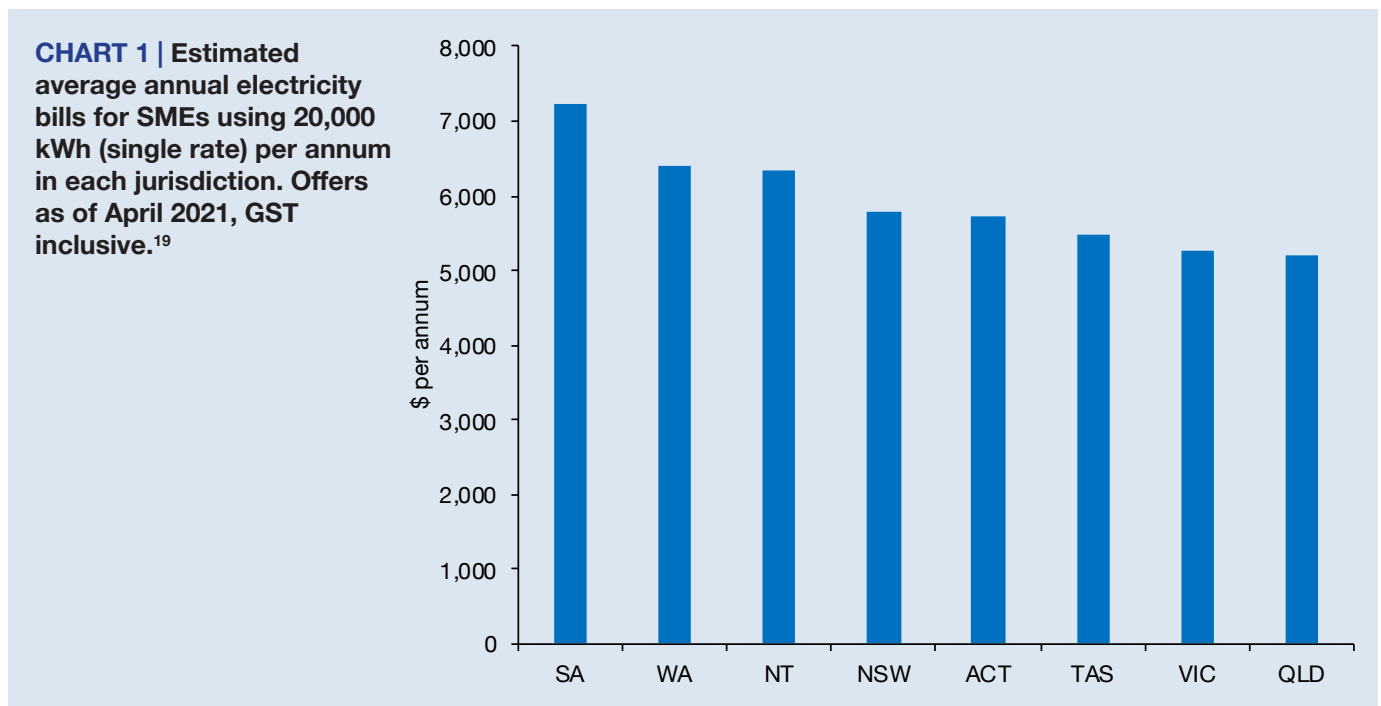


Chart 2 shows changes to electricity bills from April 2016 to April 2021. It shows that bills increased in all jurisdictions except for Tasmania and Queensland during the period but that the increases vary significantly between jurisdictions.²⁰ Furthermore, it shows that average bills have decreased or remained unchanged in all jurisdictions over the last six months.

¹⁹ Based on offers available in April 2021. Average market offer (including guaranteed discounts and pay on time discounts) for each network area. For areas without market offers (the Ergon Energy, PWC, Horizon Energy and Western Power networks) the bills are based on the regulated/standing offer.

²⁰ Note that new retailers have entered the Tasmanian market during this period and that the average bill calculation for October 2019 and April 2020 is based on Aurora Energy and 1st Energy's offers while October 2020 and April 2021 are based on Aurora Energy, 1st Energy and Future X Power.

CHART 2 | Trend estimated average annual electricity bills for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction since April 2016. GST inclusive.²¹

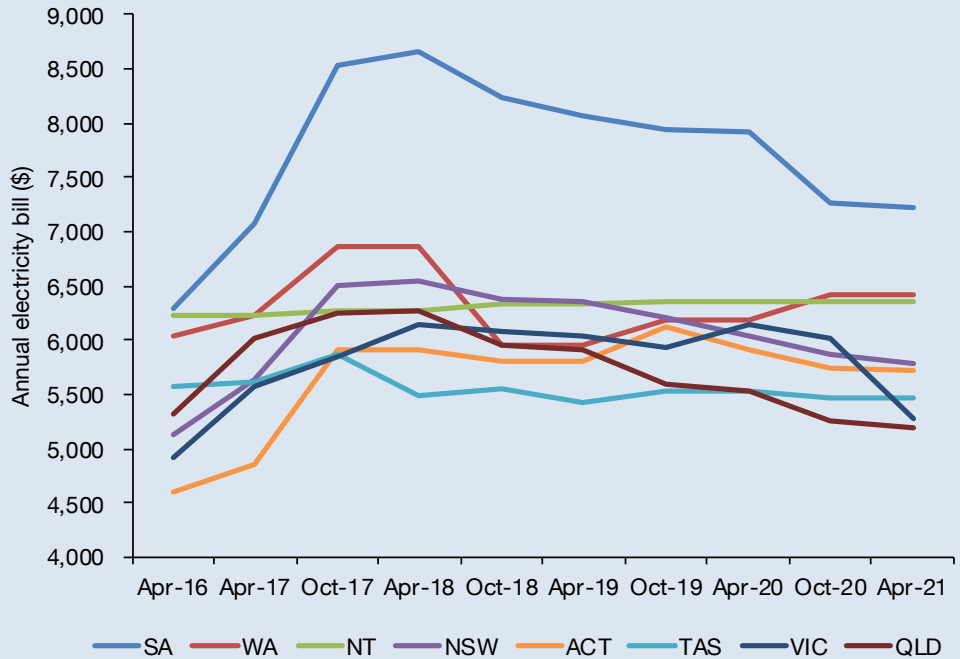
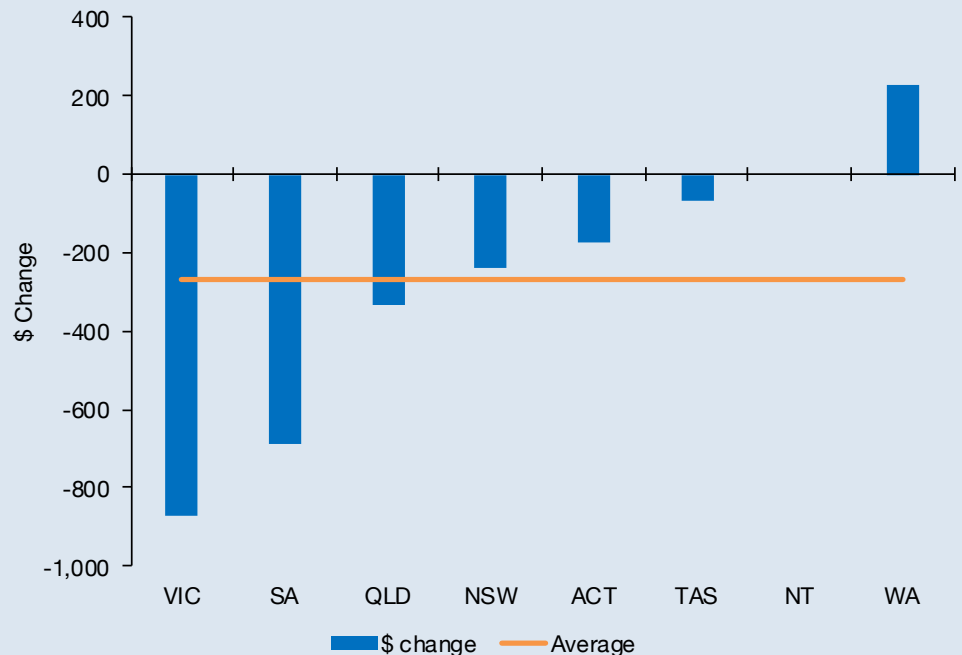


Chart 3 shows \$ changes to annual bills between April 2020 and April 2021. On average, nationally, annual electricity bills for SMEs with this consumption level decreased by approximately \$270 or 4% between April 2020 and April 2021. The greatest decreases in annual electricity bills are in Victoria (\$875) while businesses in Western Australia had increases (\$230).²²

CHART 3 | Changes (\$) to average annual electricity bills for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction from April 2020 and April 2021. GST inclusive.

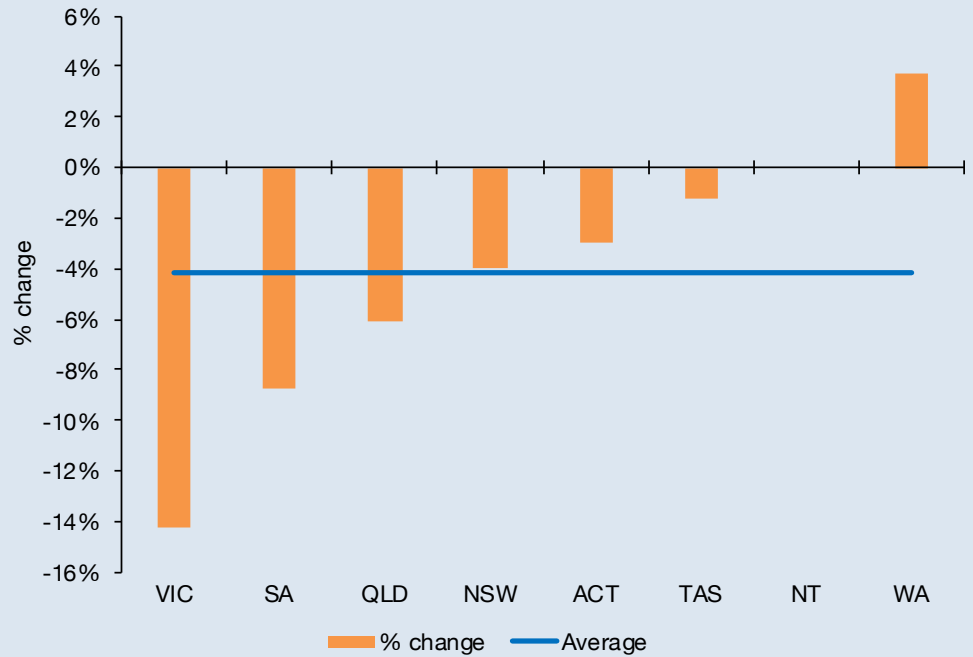


In terms of percentage changes, Chart 4 shows that bills in Western Australia increased by 4% while bills in Victoria decreased by 14% during this period.

²¹ Average market offer (including guaranteed discounts and pay on time discounts) for each network area. For areas without market offers (the Ergon Energy, PWC, Horizon Energy and Western Power networks) the bills are based on the regulated/standing offer.

²² Note that these price changes may differ from the overall averages in the jurisdictional analyses (section 4 below). This is because the average bill in this section is based on all retailers offering retail contracts as of April 2020 and April 2021 while the jurisdictional analyses compare retailers that had offers in both April 2020 and April 2021 only. Also, in relation to Tasmania, the October 2018 bill calculation is based on Aurora Energy only while the October 2019 and April 2020 bill calculations are based on Aurora and 1st Energy. The October 2020 and April 2021 calculations are based on Aurora, 1st Energy as well as Future X Power.

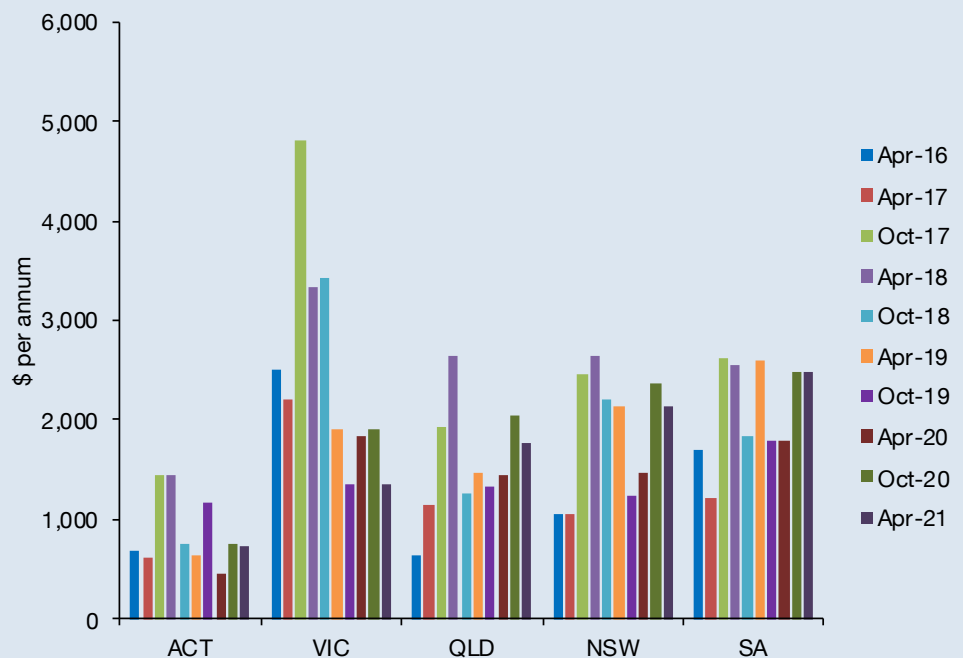
CHART 4 | Changes (%) in average electricity bills for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction from April 2020 and April 2021. GST inclusive



3.1.1 Maximum price spread – electricity

The difference between the market offers, the maximum price-spread, has increased in all jurisdictions except Victoria over the last year (since April 2020). In April 2021 the maximum price-spread in Victoria was approximately \$1,355, \$2,140 in NSW, \$1,775 in South East Queensland, \$2,475 in South Australia and \$740 in the ACT.²³ Chart 5 shows the trend in the maximum price-spread since April 2016 for all jurisdictions where a number of retailers offer electricity market contracts.

CHART 5 | Maximum price-spread for electricity market offers (including guaranteed and pay on time discounts) in each jurisdiction since April 2016. Based on SMEs using 20,000 kWh (single rate) per annum, GST inclusive

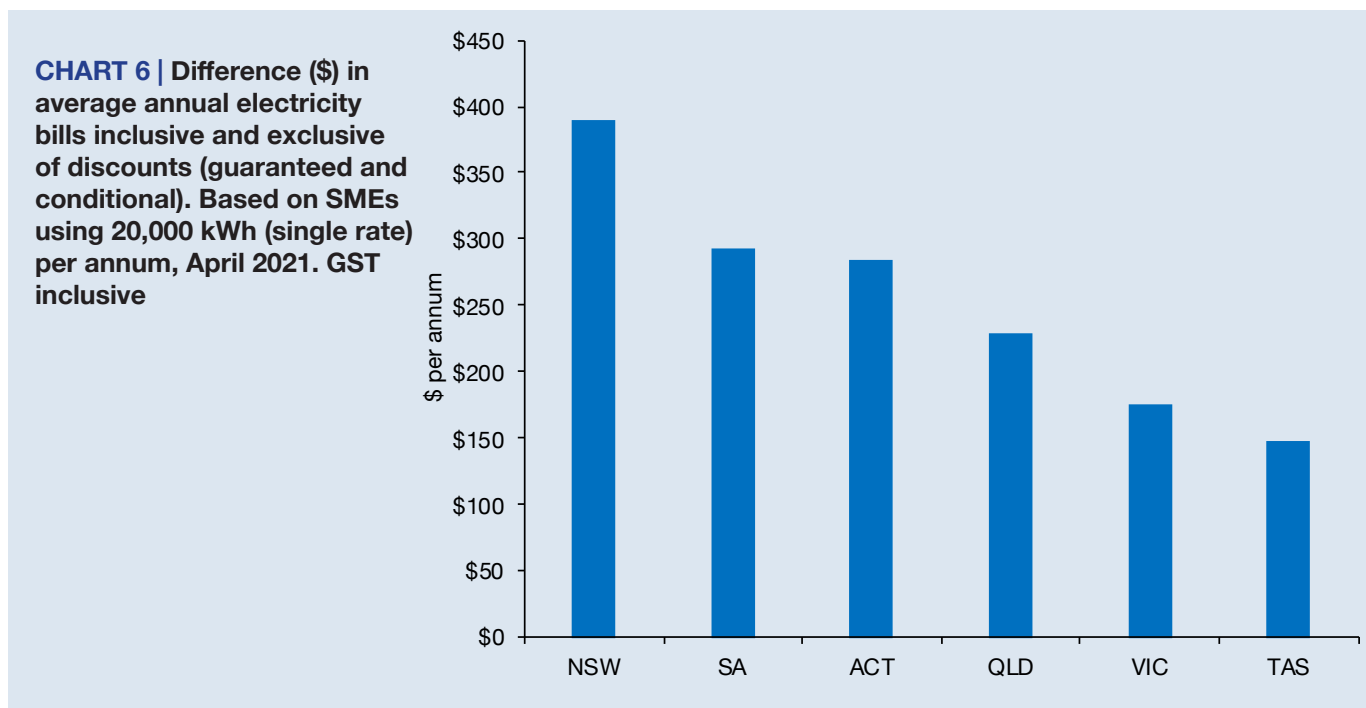


3.1.2 Additional discounts – electricity

While some retailers offer guaranteed discounts, others have discounts that are conditional upon bills being paid on time. Chart 6 shows the difference between the average market offer bill excluding guaranteed and conditional discounts, and the average market offer bill inclusive of discounts. It shows that discounts

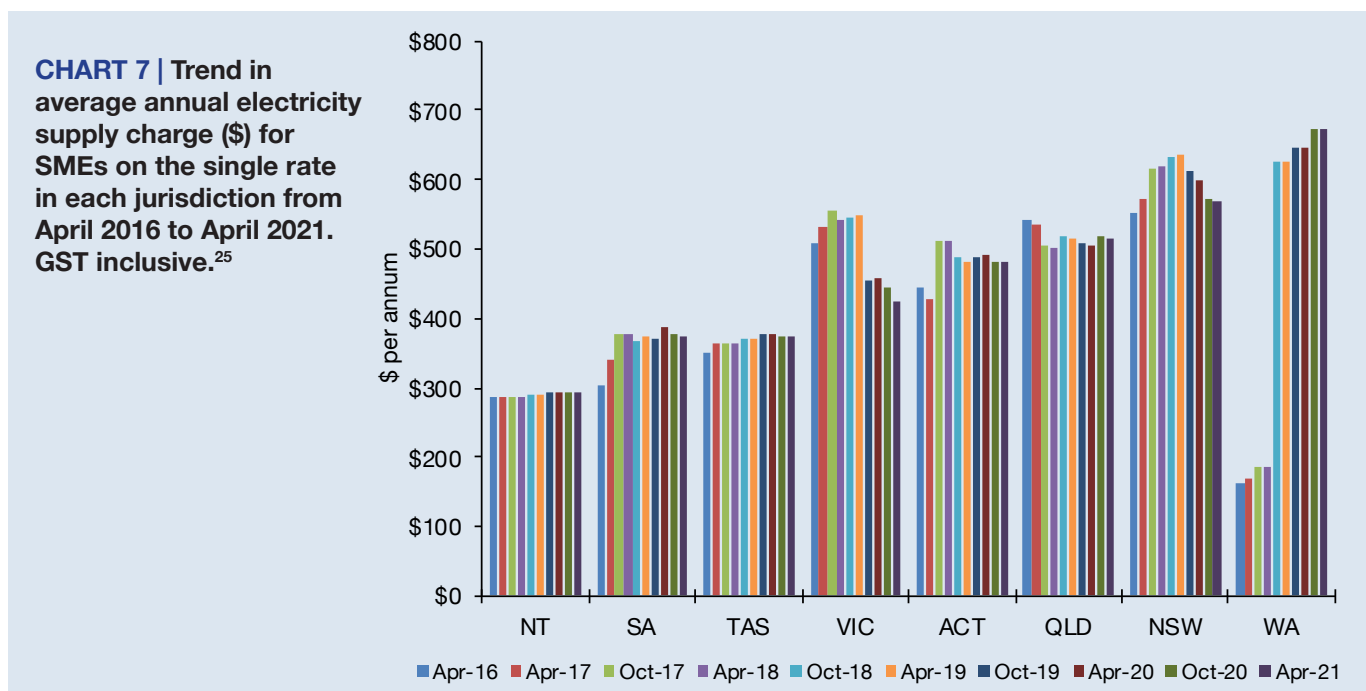
²³ Based on annual consumption of 20,000 kWh and as of April 2021 the analysis is based on 7 retail offers in the ACT, 21 retailers South Australia and Victoria and 26 in South East Queensland and NSW.

have the greatest impact in NSW (reduces a typical annual bill by approximately \$390) while they have the least impact in Tasmania (approximately \$150).²⁴ Compared to six months ago (October 2020), the level of discounting has reduced in Victoria and South East Queensland, increased in South Australia and remained unchanged in other jurisdictions.



3.1.3 Fixed supply charge – electricity

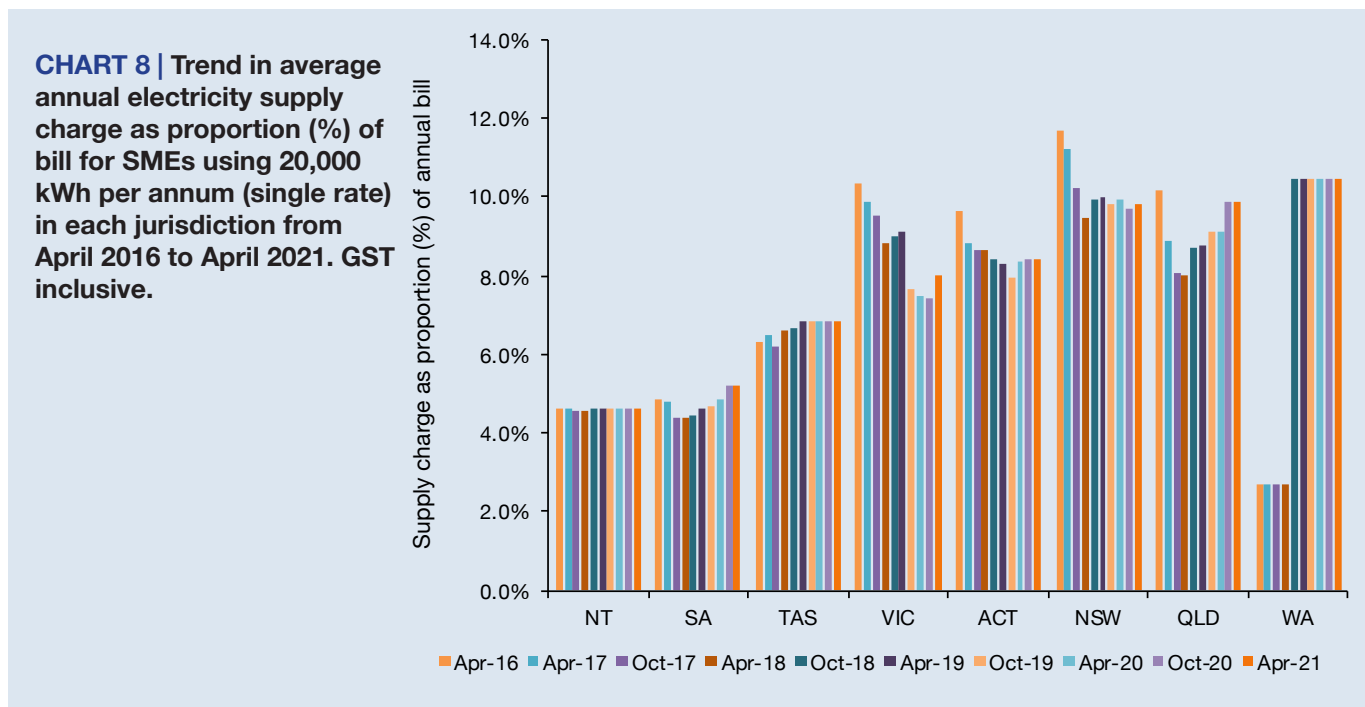
Over the last year, fixed supply charges have decreased in the ACT, NSW, South Australia, Tasmania and Victoria, while they have remained unchanged in the Northern Territory. Western Australia used to have relatively low supply charges but in July 2018 it increased considerably (by \$440 per annum) and it is now the highest supply charge in the country (\$671 per annum). Annual fixed supply charges are \$569 in NSW (decrease of 5%), \$423 in Victoria (decrease of 8%), \$514 in Queensland (increase of 2%), \$483 in the ACT (decrease of 2%), \$375 in Tasmania (decrease of 1%) and \$373 in South Australia (decrease of 3%). The supply charge is lowest in the Northern Territory (\$292).



²⁴ Jurisdictions without market offers have not been included in this analysis. For Queensland, it is based on market offers in South East Queensland (Energex network) only.

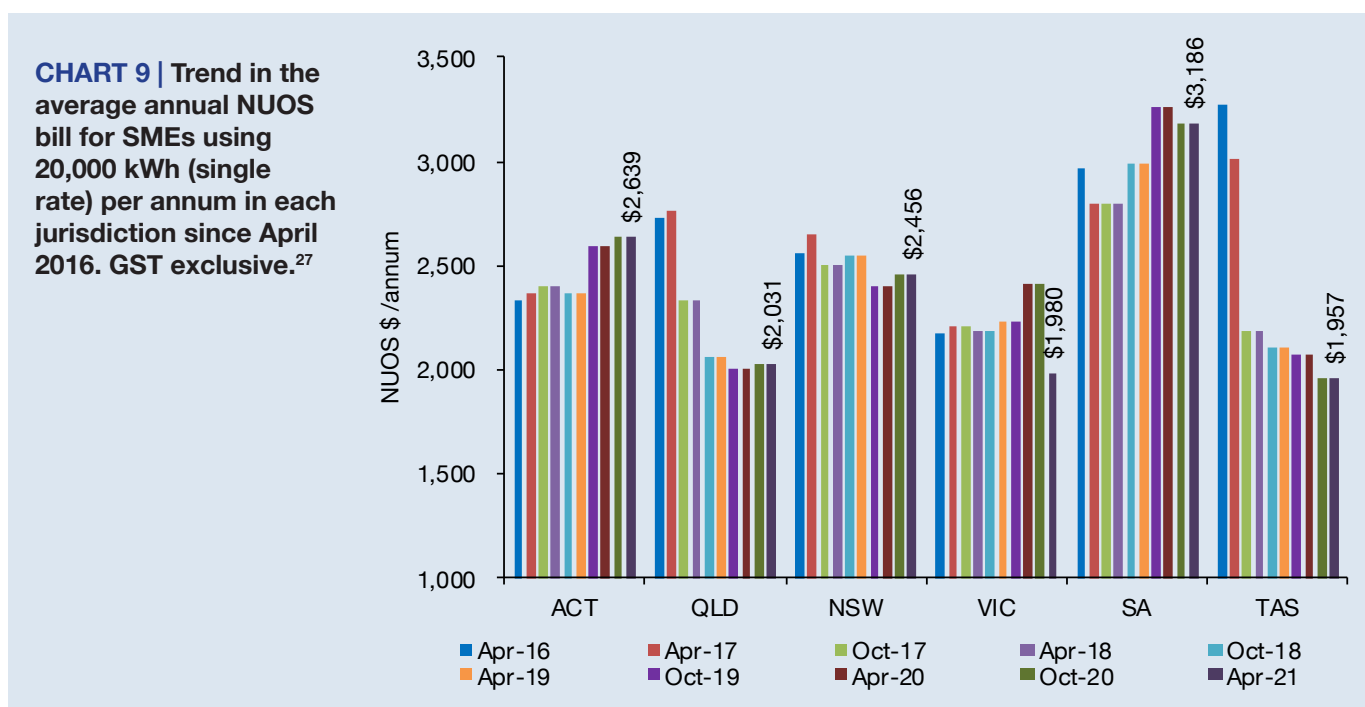
²⁵ Based on the average annual supply charge for electricity market offers except for in WA, NT, Tasmania and Northern Queensland (Ergon Energy network) where it is based on the regulated rate.

Fixed supply charges as a proportion of the annual bill are currently highest in Western Australia (10.5%) and lowest in the Northern Territory (4.6%). Over the last six months (since October 2020), the supply charge as proportion of bills has increased in Victoria and NSW. Chart 8 shows the trend in the average electricity supply charge as proportion of bill in each jurisdiction.



3.1.4 Electricity network charges

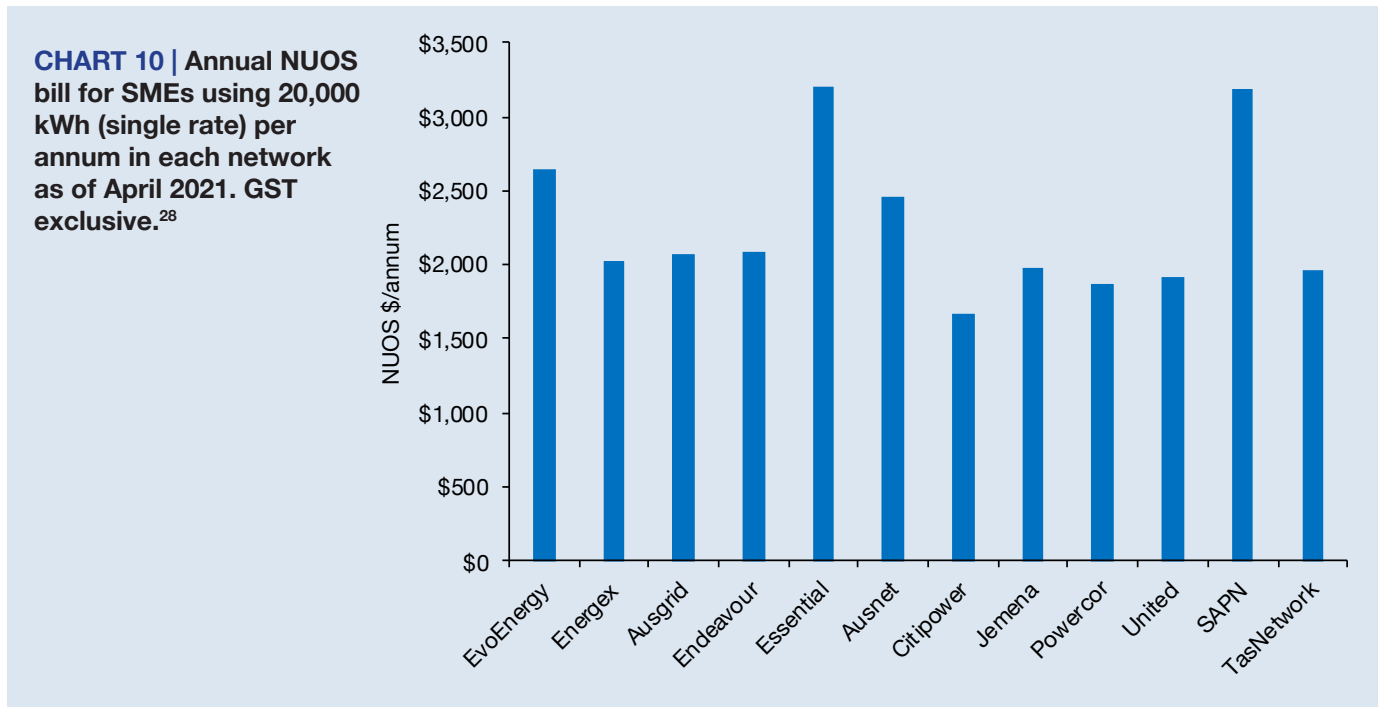
Compared with the same period a year ago, the Network Use of System Charges (NUOS) decreased in Victoria (18%), South Australia (2%) and Tasmania (6%). In NSW and the ACT, on the other hand, they increased by 2%. In Queensland they increased by 1%. As of April 2021, South Australia is the jurisdiction with the highest NUOS charges (approximately \$3,186 for SMEs consuming 20,000 kWh per annum) while Tasmania has the lowest (approximately \$1,960 for the same consumption level).²⁶ With the recent price reduction in Victoria, the annual average NUOS charge is now the second lowest at \$1,980.



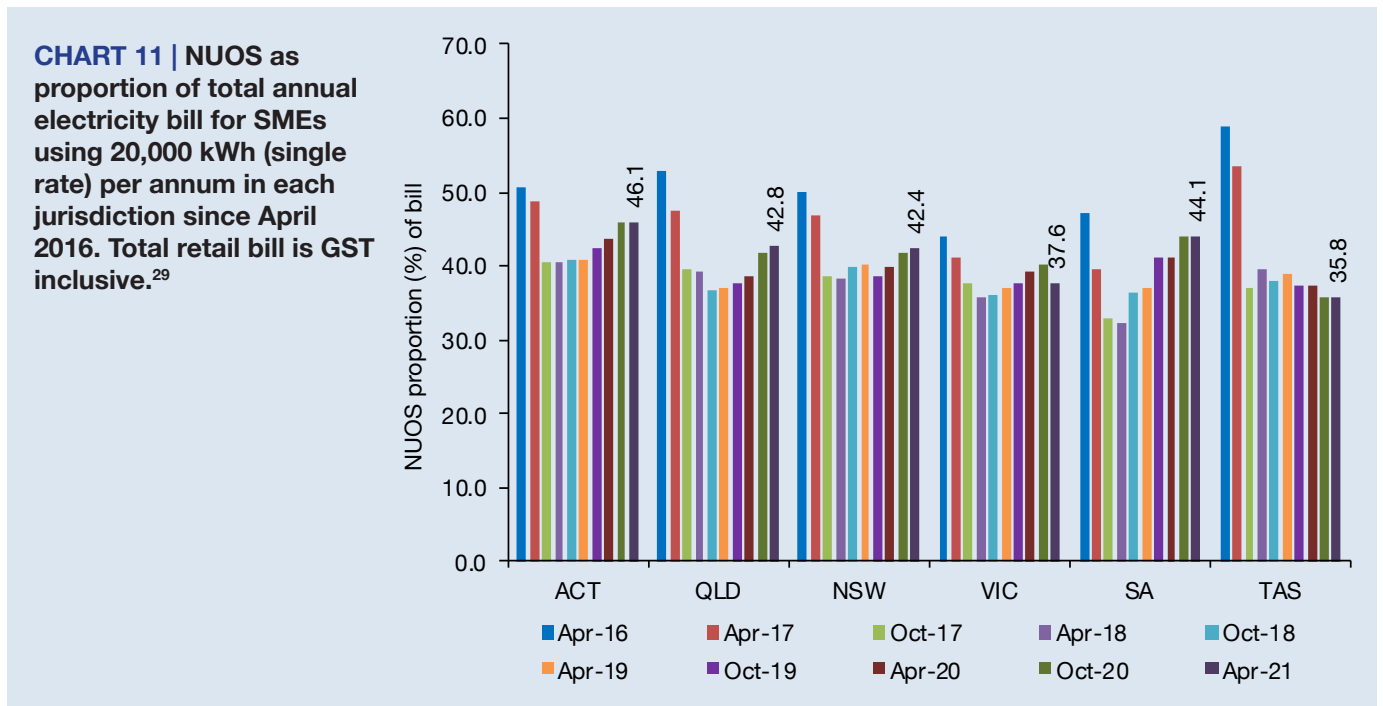
²⁶ Based on annual consumption of 20,000 kWh.

²⁷ Queensland is based on Energex network only.

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



Since April 2016 (when the SME Retail Tariff Tracker project commenced) there was first a trend decline in NUOS as proportion of the total retail bill in all jurisdictions. Since April 2020, however, the NUOS proportion has increased in all NEM jurisdictions except Victoria and Tasmania. In April 2021 the NUOS proportion of bills was highest in the ACT and South Australia (46.1% and 44.1%, respectively). See Chart 11.



²⁸ NUOS bills are based on the fixed supply charge and usage charges only and do not include separately listed metering charges.

²⁹ Total retail bill based on average market offer including guaranteed and pay on time discounts. Note that Queensland is based on the Energex network only.

3.1.5 Electricity ‘bill-stacks’

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

In order to estimate what retailers currently pay for wholesale energy we have used the average of the AEMC’s 2020/21 and 2021/22 figures.³⁰ We note that wholesale prices have significantly decreased in recent months and while retailers may be contracted to higher prices, we would expect to start seeing the impact of lower wholesale prices by now.

TABLE 2 | AEMC electricity wholesale costs (c/kWh) 2020/21 and 2021/22

	c/kWh 2020/21	c/kWh 2021/22	Average c/kWh
ACT	9.07	7.61	8.3
NSW	9.27	8.00	8.6
Queensland	7.48	6.10	6.8
South Australia	11.44	8.89	10.2
Tasmania	8.47	7.08	7.8
Victoria*	10.12	7.29	8.7

The AEMC’s Electricity Price Trends data is also the source used to estimate ‘green scheme’ costs.³¹ Table 3 below shows AEMC’s estimated environmental costs for 2020/21 and 2021/22 as well as the average used for this analysis.

TABLE 3 | AEMC ‘Green scheme’ costs (c/kWh) 2020/21 and 2021/22

	c/kWh 2020/21	c/kWh 2021/22	Average c/kWh
ACT	4.23	4.81	4.5
NSW	2.28	2.14	2.2
Queensland	2.66	2.48	2.6
South Australia	3.46	3.32	3.4
Tasmania	2.25	2.08	2.2
Victoria	2.37	2.27	2.3

By deducting estimated GST, NUOS costs, wholesale costs and the cost of environmental policies (‘green schemes’), the residual retail component of the average market offer bill is shown in Chart 12. This component is currently zero in the ACT and as high as \$1,025 in Tasmania.³²

³⁰ AEMC, Residential Electricity Price Trends 2020, Data available at <https://www.aemc.gov.au/news-centre/data-portal/price-trends-2020>.

³¹ AEMC, Residential Electricity Price Trends 2020, Data available at <https://www.aemc.gov.au/news-centre/data-portal/price-trends-2020>.

³² Note that the retail component is the residual amount after deducting other costs from the bills. All market offers are inclusive of any guaranteed or pay on time discount offered by the retailers. A zero-residual amount in the ACT does not mean that the retailers do not have costs or a margin in this jurisdiction and we emphasise that this is based on average retail bill across all retailers (not weighted for market share). It can, however, indicate that the retail costs/margins are lower in the ACT compared to other jurisdictions. We have also been advised that the NUOS includes some ‘green scheme’ costs in the ACT.

CHART 12 | Estimated cost components of annual electricity bill for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction in April 2021. Total retail bill is GST exclusive.³³

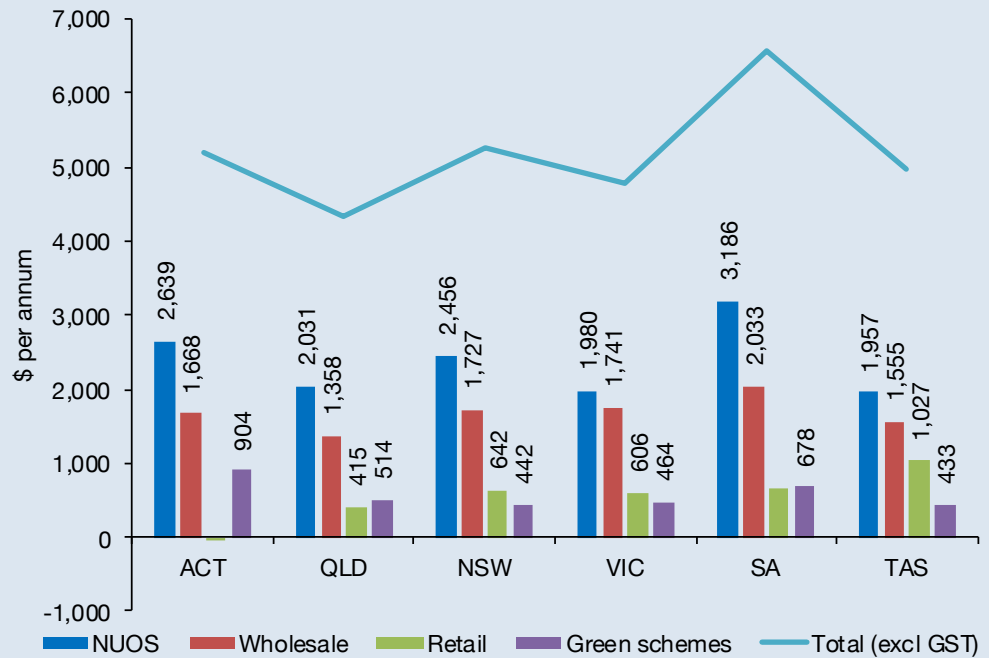
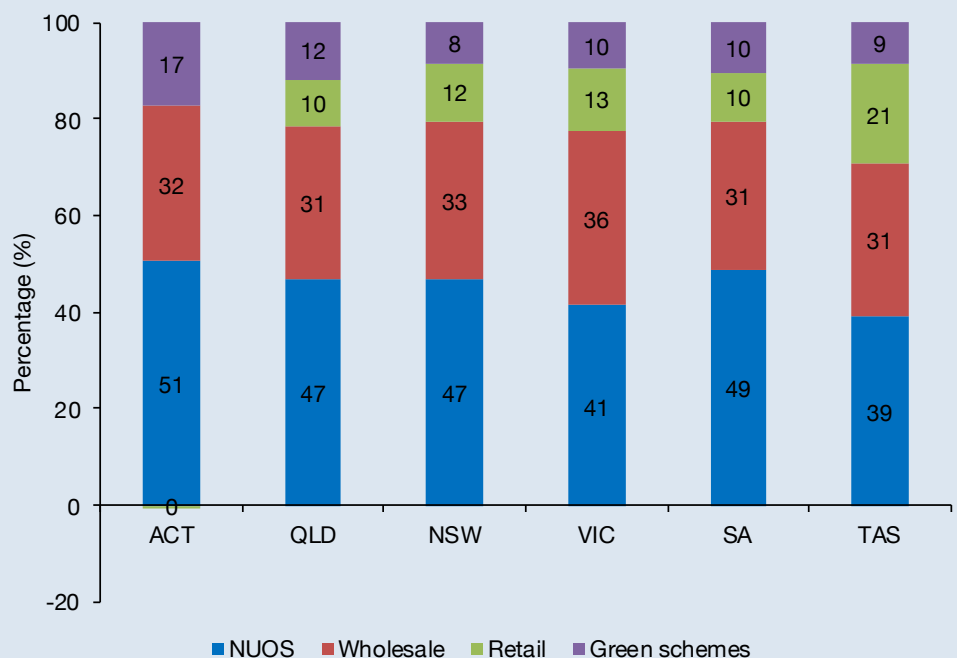


Chart 13 shows the bill components as a percentage of the total bill. It shows that the NUOS component of a retail bill (exclusive of GST) is 39–51%. The cost of wholesale energy ranges from 31% in Queensland, South Australia and Tasmania to 36% in Victoria. The residual retail component also varies significantly. While it is zero in the ACT it is as high as 21% in Tasmania.³⁴ The ‘green scheme’ component is highest in the ACT (17%) and lowest in NSW (8%).

CHART 13 | Estimated bill-stack proportions of annual electricity bill for SMEs using 20,000 kWh (single rate) per annum in each jurisdiction in April 2021. Total retail bill is GST exclusive.³⁵



³³ The NUOS does not include separately listed standard metering charges. The Queensland figures are based on the Energex network only

³⁴ A zero-residual amount in the ACT does not mean that the retailers do not have costs or a margin in this jurisdiction. It can, however, indicate that the retail costs/margins are lower in the ACT compared to other jurisdictions.

³⁵ Total retail bill based on average market offer including guaranteed and pay on time discounts. Note that as these proportions are based on total retail bills exclusive of GST, the network proportion will be greater than in chart 11 which is based on bills inclusive of GST.

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

In October 2018 the Australian Treasurer and the Minister for Energy requested the Australian Energy Regulator (AER) develop a Default Market Offer (DMO) for each electricity network area in NSW, South Australia and South East Queensland.³⁶ This request was in response to recommendations outlined in the Australian Competition and Consumer Commission’s (ACCC) Retail Electricity Pricing Inquiry. The initial regulated DMOs took effect on 1 July 2019 but these rates were replaced by new DMO rates on 1 July 2020.³⁷ The DMO has replaced the retailer determined standing offers previously available in these networks.

The Victorian Default Offer (VDO) is a Victorian Government initiative that requires the Essential Services Commission (ESC) to set a VDO for basic metering types (single rate) in each network area. All retailers are required to offer the VDO but they can, and still do, offer other market contracts. The initial VDO took effect on 1 July 2019 but these rates were replaced by new VDO rates on 1 January 2020 and 1 January 2021. All SMEs that were on a retailer’s standing offer prior to the introduction of the DMO and VDO were moved to the DMO or VDO.

On average, the current DMO/VDO have lowered standing offer bills by approximately 33% in Victoria, 10% in NSW and South East Queensland, and 16% in South Australia compared to the standing offers that were in place prior to the DMO/VDO taking effect in July 2019.³⁸ The below outlines the decreases to standing offers post the DMO and VDO taking effect and further analysis on impacts and market changes are discussed under the jurisdictional analysis (Section 4).

The Default Market Offer (DMO)

The AER’s DMO is expressed as an annual bill for a set consumption level and retailers are still able to “translate the annual amount into different tariff structures”.³⁹ The Regulations stipulate that retailers must structure their prices to not exceed the annual DMO price for that consumption level.⁴⁰

The DMO prices, effective from July 2020, for single rate in NSW, South East Queensland and South Australia, as well as AER’s estimated median saving for customers on set consumption levels are listed in table 4 below.⁴¹

TABLE 4 | Small business DMO prices in NSW, South East Queensland and South Australia for 2020-21 (including GST)

	Ausgrid	Endeavour Energy	Essential Energy	Energex	SAPN
SINGLE / FLAT RATE					
Annual bill	\$7,240	\$6,177	\$8,041	\$5,760	\$8,305
Change*	-\$131	-\$27	-\$4	-\$265	-\$815
Consumption level	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum	20,000 kWh/ annum

* The change is the difference to annual bills between the DMO price that took effect in July 2019 and the DMO price that took effect in July 2020 based on the model annual usage.

In NSW, the current DMO produces significantly lower bills compared to AGL, Energy Australia and Origin Energy’s standing offers prior to 1 July 2019. Chart 14 compares the DMOs as of July 2020 and July 2019 to the ‘big 3’ retailers’ average standing offers in each network area.⁴² In the Ausgrid network the current DMO is 12% less than the average standing offer as of April 2019, in Endeavour Energy it is 8% less and bills are down by 9% in Essential Energy.

³⁶ See <https://www.aer.gov.au/system/files/Letter%20to%20the%20AER%20Chair%20-%20default%20pricing.pdf>

³⁷ New DMO rates will take effect on 1 July 2021.

³⁸ Based on the ‘big 3’ retailers’ standing offers prior to DMO/VDO taking effect and small businesses consuming 20,000 kWh per annum.

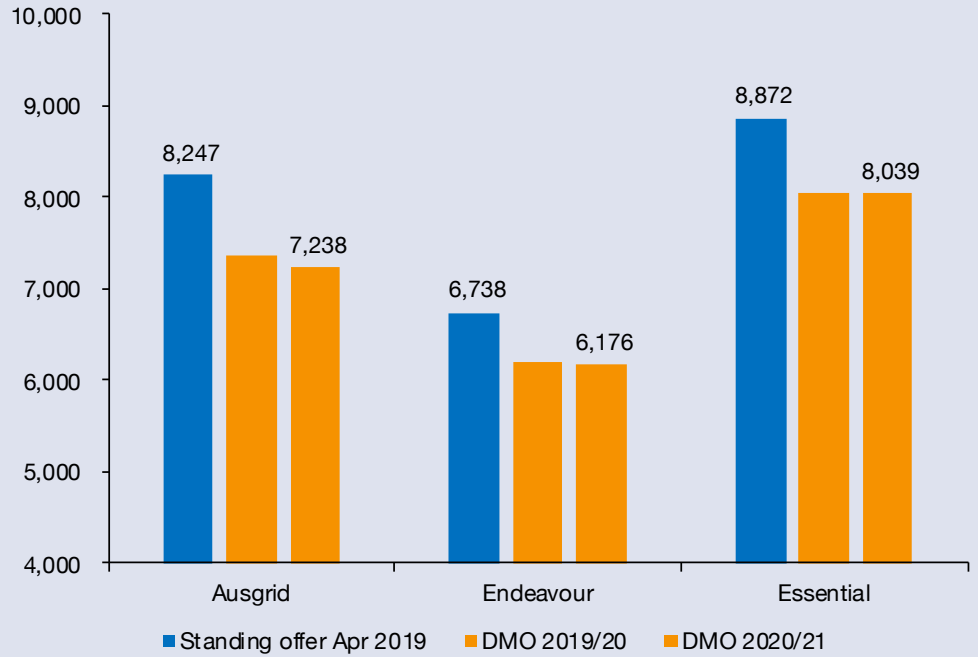
³⁹ AER, Default Market Offer Prices 2019-20, Final Determination, April 2019, 9

⁴⁰ Ibid., 9

⁴¹ AER, Default Market Offer Prices 2020-21, Final Determination, April 2020, 9

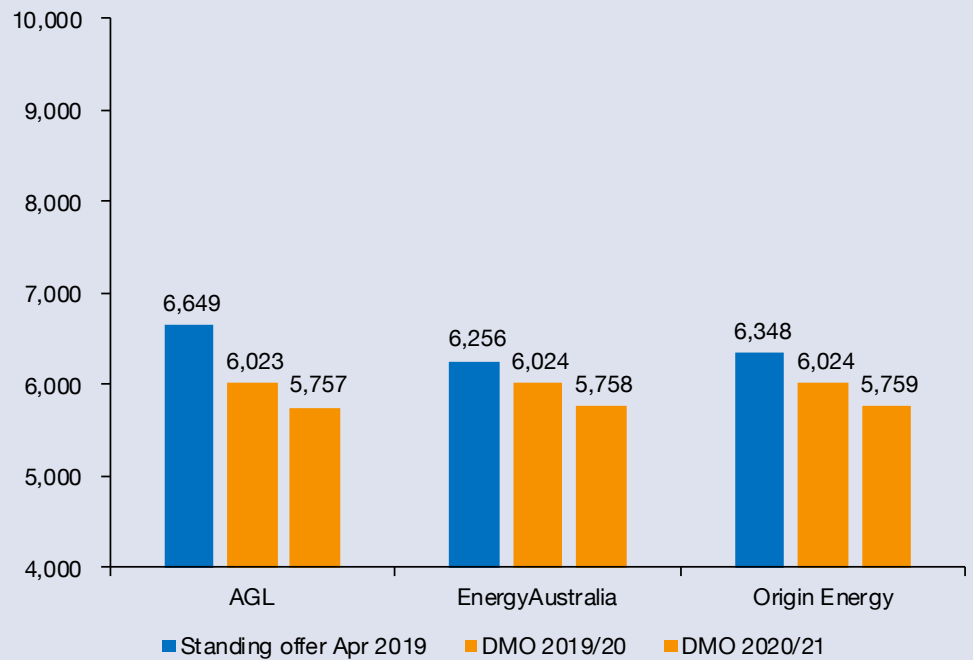
⁴² The ‘big 3’ retailers are AGL, Energy Australia and Origin Energy.

CHART 14 | The DMO as of 2019/20 and 2020/21 compared to the 'big 3' retailers' standing offers in NSW. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



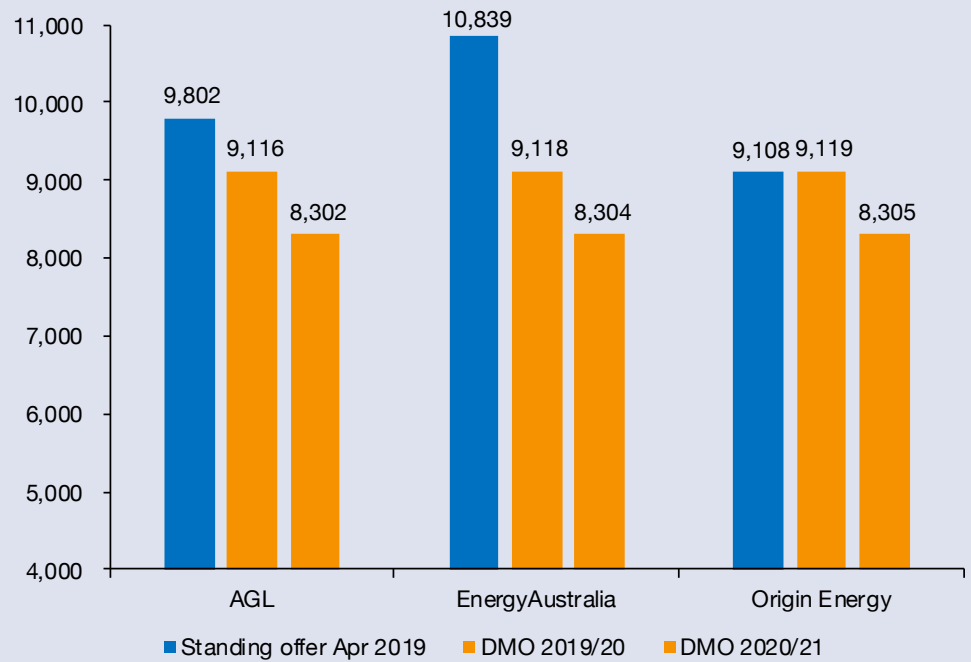
In South East Queensland, the current DMO produces an annual bill that is 10% less than the 'big 3' retailers' average standing offer as of April 2019.

CHART 15 | The DMO as of 2019/20 and 2020/21 compared to the 'big 3' retailers' standing offers in South East Queensland (Energex network). Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



In South Australia, the current DMO produces an annual bill that is 16% less than the 'big 3' retailers' average standing offer as of April 2019.

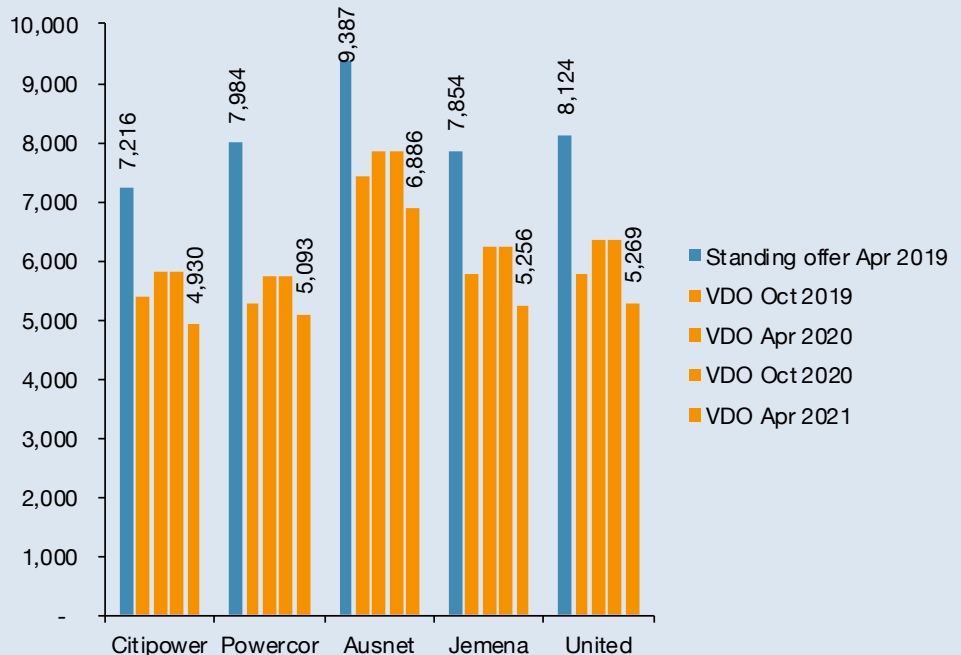
CHART 16 | The DMO as of 2019/20 and 2020/21 compared to the 'big 3' retailers' standing offers in South Australia (SA Power Networks). Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



Victorian Default Offer (VDO)

Chart 17 compares the VDO rates to the 'big 3' retailers' average standing offers (as of April 2019) in each of the five Victorian network areas.⁴³ In October 2019 the VDO in the Powercor network was 34% less than the average standing offer in place prior to the VDO taking effect. The increase in January 2020, however, means that the VDO increased by 8%. In January 2021, however, the VDO significantly decreased. The VDO is now 33% less than the average standing offer in April 2019 (prior to the VDO arrangements taking effect). In the Ausnet Services network area bills initially reduced by 21%, then increased by 6% before reducing by 12% in January 2021. Bills are now 27% less compared April 2019. In Jemena they initially went down by 26%, increased by 8% and reduced by 16%. The VDO is now 33% lower than the average standing offer bill in April 2019. In Citipower they first went down by 25%, increased by 8% and decreased by 15% in January 2021. The January 2020 increase was greatest in the United Energy network (10%) but that network also saw the greatest decrease in January 2021 (17%). Bills are now 35% less compared to April 2019.

CHART 17 | The VDO compared to the 'big 3' retailers' standing offers in Victoria. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



⁴³ While the VDO only applies to the single rate tariff, retailers have been required, since 1 January 2020, to ensure that all standing offers (irrespective of tariff type) are within the maximum bill determination for the single rate VDO offer.

3.1.7 Broader market impacts from re-regulation

This section compares electricity offers available in NSW (the Ausgrid network), Victoria (the Citipower network), Queensland (the Energex network) and South Australia (SA Power Networks) prior to the DMO/VDO taking effect (offers available in April 2019) to offers in October 2020 and those currently available (April 2021).⁴⁴ It examines changes to the number of retailers offering contracts to SME customers, use of discounts and other offer features.⁴⁵

As of April 2019 (prior to the new regulation taking effect), there were 20 retailers in NSW’s Ausgrid network compared to 29 retailers as of April 2021. It has been a similar trend in South Australia and South East Queensland. In Queensland’s Energex network, there were 16 active retailers in April 2019 compared to the current number of 26. In South Australia they have gone from having 17 retailers in April 2019 to 21 as of April 2021. In Victoria’s Citipower network there were 22 retailers as of April 2019 and this has not changed as of April 2021.

The use of additional discounts continues to decrease. Table 5 below shows proportion of offers with a guaranteed discount and proportion of offers with a conditional pay on time discount as of April 2019, October 2020 and April 2021. The decline is sharpest in regards to pay on time discounts but we note that South Australia has had an increase in both guaranteed discounts and pay on time discounts in over the last six months (since October 2020).

TABLE 5 | Proportion of total offers with guaranteed and pay on time discounts in April 2019, October 2020 and April 2021

	Guaranteed discount			Pay on time discount		
	% of offers with guaranteed discount April 2019	% of offers with guaranteed discount October 2020	% of offers with guaranteed discount April 2021	% of offers with pay on time discount April 2019	% of offers with pay on time discount October 2020	% of offers with pay on time discount April 2021
NSW (Ausgrid)	30	20	21	45	17	17
VIC (Citipower)	32	23	18	55	23	9
QLD (Energex)	38	25	23	38	17	15
SA (SAPN)	35	19	29	41	10	14

For some years, retailers have commonly applied a “benefit period” to their offers if there was no minimum contract term. The “benefit period” (typically 12 or 24 months) stipulated how long incentives, such as discounts, were available for. As discounts are less common now, the use of contract terms and “benefit periods” have also declined. We note, however, that the majority of this decline occurred between April 2019 and October 2020. Table 6 below shows proportion of offers with a set contract term or “benefit period” as of April 2019, October 2020 and April 2021.

TABLE 6 | Proportion of total offers with a set contract term or “benefit period” in April 2019, October 2020 and April 2021

	% of offers with a set contract term or “benefit period” April 2019	% of offers with a set contract term or “benefit period” October 2020	% of offers with a set contract term or “benefit period” April 2021
NSW (Ausgrid)	50	27	28
VIC (Citipower)	50	18	14
QLD (Energex)	50	25	23
SA (SAPN)	53	24	24

⁴⁴ While the analysis only examines retail offers available in one network for each jurisdiction, most retail offers apply the same features (discounts, conditions etc.) to their offers across all network areas within a jurisdiction.

⁴⁵ This analysis is based on one market offer (single rate) per retailer and we note that some retailers have more than one offer in each network. See Appendix A for retail offers used. There may have been other retailers that were active in these jurisdictions in both April 2019, October 2020 and April 2021 but only retailers with market offers on their website at the time the data was collected have been included in this analysis.

An offer feature that has become increasingly common is a mandatory shortened billing cycle. Typically, electricity bills are issued every quarter, but a significant proportion of offers are now conditional upon the customer receiving monthly bills. In Victoria, a significant proportion of retailers moved to monthly billing between April 2019 and October 2020 but some retailers have since made monthly billing optional. In South Australia, on the other hand, the proportion of offers with shortened billing cycles has reduced. Table 7 below shows the proportion of offers with a mandatory monthly billing condition as of April 2019, October 2020 and April 2021.

TABLE 7 | Proportion of total offers with a set “benefit period” in April 2019, October 2020 and April 2021

	% of offers with monthly billing April 2019	% of offers with monthly billing October 2020	% of offers with monthly billing April 2021
NSW (Ausgrid)	35	40	41
VIC (Citipower)	36	77	68
QLD (Energex)	38	43	42
SA (SAPN)	35	29	33

3.2 Gas bills

Chart 18 shows estimated annual gas bills for SMEs that consume 100 GJ per annum across all states and territories. Tasmanian businesses with this consumption level will have an annual gas bill of just over \$4,740, though this is understood to be a high level of use for a typical SME in Tasmania (with many using less). For this level of consumption Victorian businesses will pay approximately \$2,145.

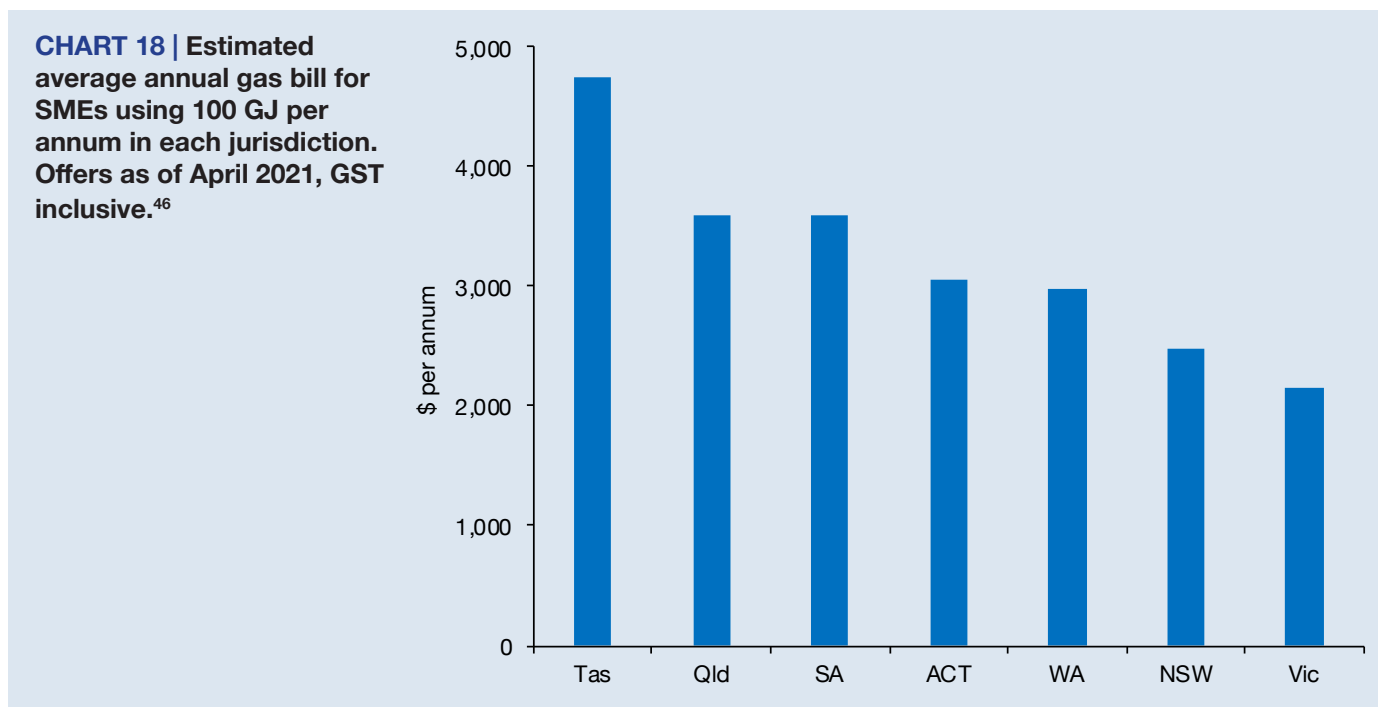


Chart 19 shows the trend in annual gas bills from April 2016 to April 2021. It shows that bills increased in all jurisdictions except for Western Australia between April 2016 and April 2020. As of April 2021, however, gas prices in NSW are now lower than they were in April 2016. SMEs in Victoria and Tasmania have experienced the greatest price increases since April 2016.

⁴⁶ Based on offers available in April 2021. Average market offer (including guaranteed discounts and pay on time discounts). In QLD this is based on offers available in the Brisbane North and the Brisbane South pricing zones, in NSW it is based on offers available in the Sydney/Jemena zone, in Victoria it is based on the eight major gas zones, and in WA it is based on the South West zone. Tasmania and SA only have one pricing zone.

CHART 19 | Estimated average annual gas bills for SMEs using 100 GJ per annum in each jurisdiction since April 2016. GST inclusive.⁴⁷

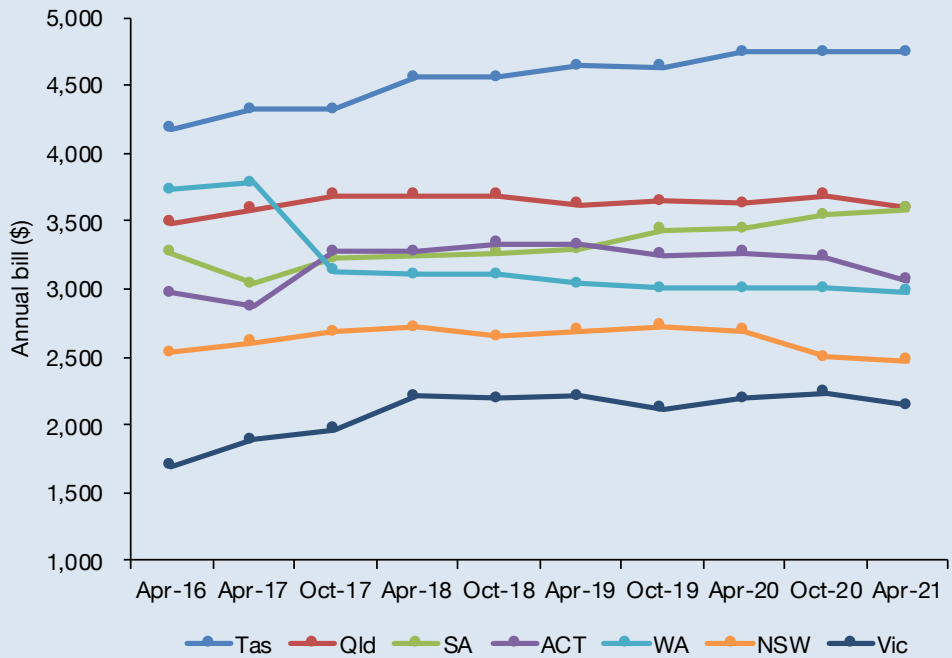
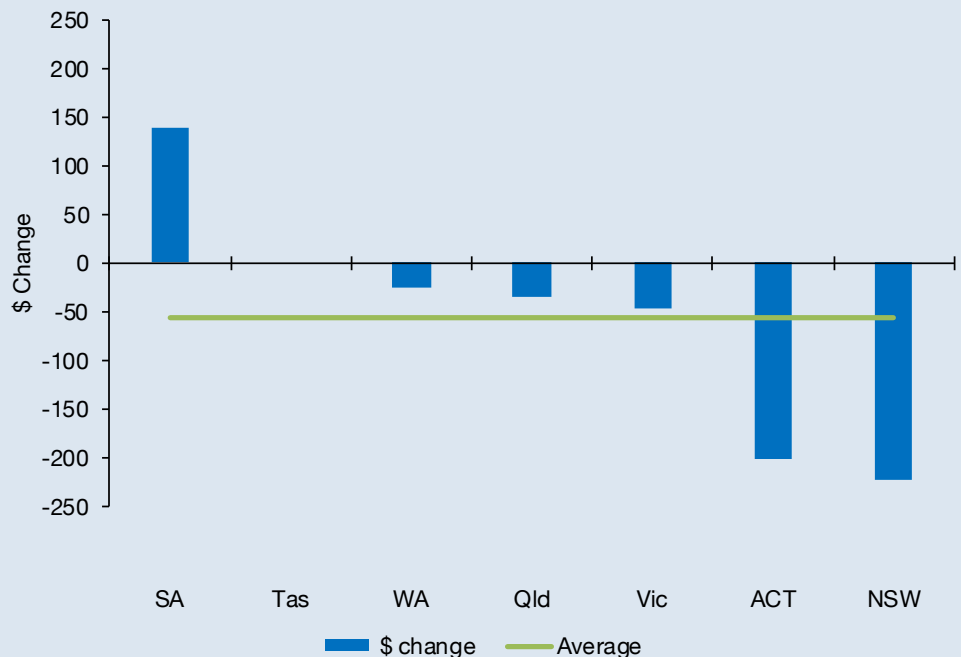


Chart 20 shows \$ change to annual bills from April 2020 to April 2021. On average, nationally, annual gas bills decreased by 2% between April 2020 and April 2021. Annual gas bills for SMEs decreased in every jurisdiction except South Australia (up by 4%) and Tasmania (unchanged), during this period. In New South Wales, they have decreased by \$225 (8%) and in the ACT the average bill is now \$200 (6%) less compared to a year ago.

CHART 20 | Changes (\$) to average annual gas bill for SMEs using 100 GJ per annum in each jurisdiction from April 2020 to April 2021. GST inclusive

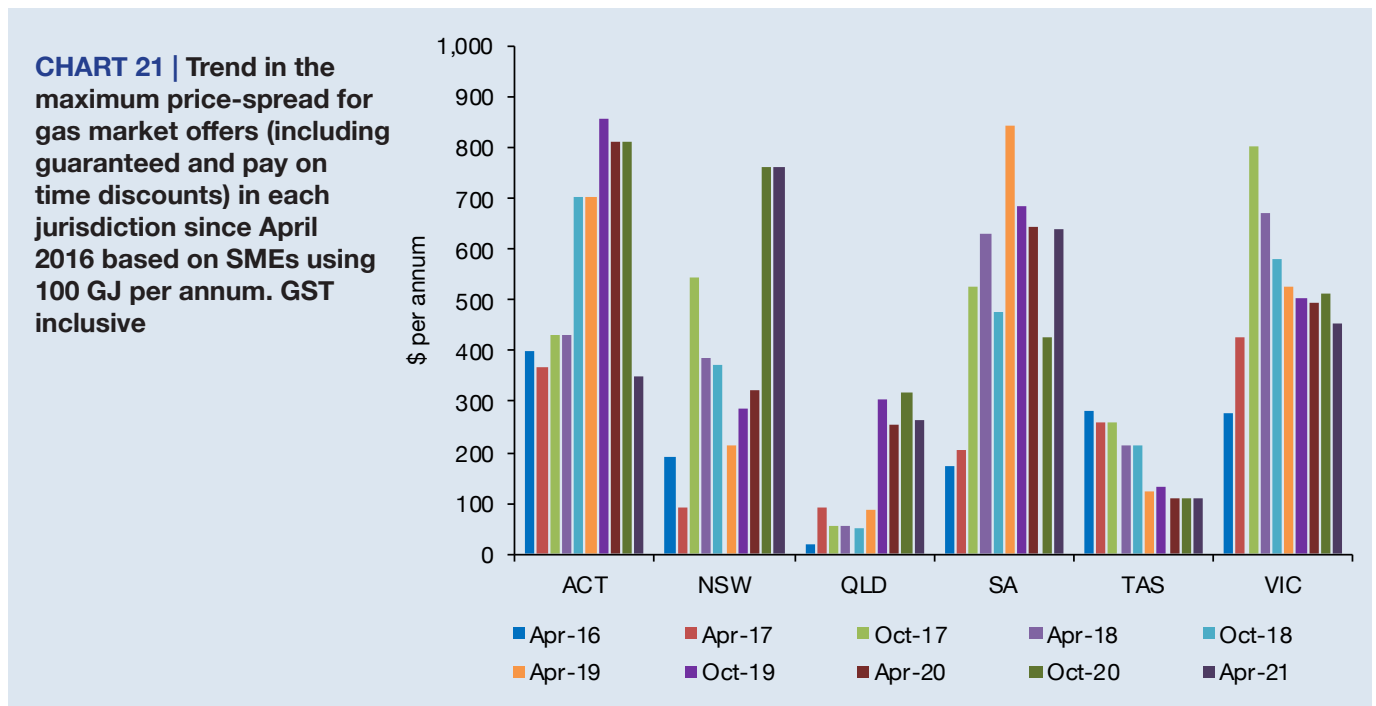


3.2.1 Maximum price spread – gas

The difference between the highest and lowest gas market offers, the maximum price-spread, decreased in the ACT and Victoria compared with the same period a year ago. For NSW, in particular, the price-spread has increased. As of April 2021, the maximum price-spread was approximately \$760 in NSW, \$640 in South Australia, \$455 in Victoria, \$350 in the ACT and \$260 in Queensland. In Tasmania, the maximum

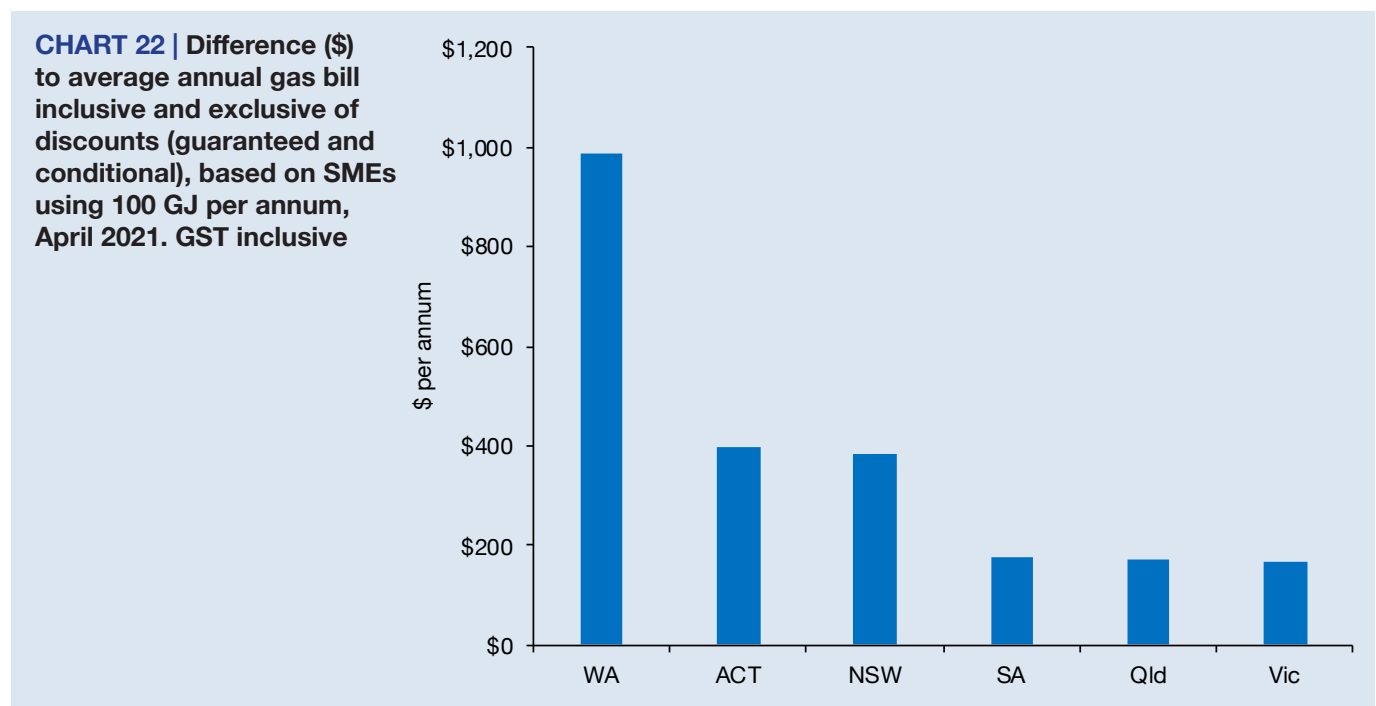
⁴⁷ Average market offer (including guaranteed discounts and pay on time discounts) for each jurisdiction. In QLD this is based on offers available in the Brisbane North and the Brisbane South pricing zones, in NSW it is based on offers available in the Sydney/Jemena zone, in Victoria it is based on the eight major gas zones, and in WA it is based on the South West zone. Tasmania and SA only have one pricing zone.

price-spread was \$110.⁴⁸ Chart 21 shows the trend in the maximum price-spread since April 2016 for all jurisdictions where a number of retailers offer gas market contracts.



3.2.2 Additional discounts – gas

Some retailers offer guaranteed discounts while none of the gas retailers currently have discounts that are conditional upon bills being paid on time. Chart 22 shows the difference between the average market offer bill excluding guaranteed discounts, and the average market offer bill inclusive of discounts. It shows that discounts have the greatest impact in Western Australia (reduces an average annual bill by \$985) while they have the least impact in South Australia, Queensland and Victoria.⁴⁹ It should be noted, however, that Western Australia only has three retailers that publish SME market offers and that this discount reflects the 45% discount offered by AGL and 32% discount offered by Origin Energy. Both retailers are relatively new entrants in the WA gas retail market.

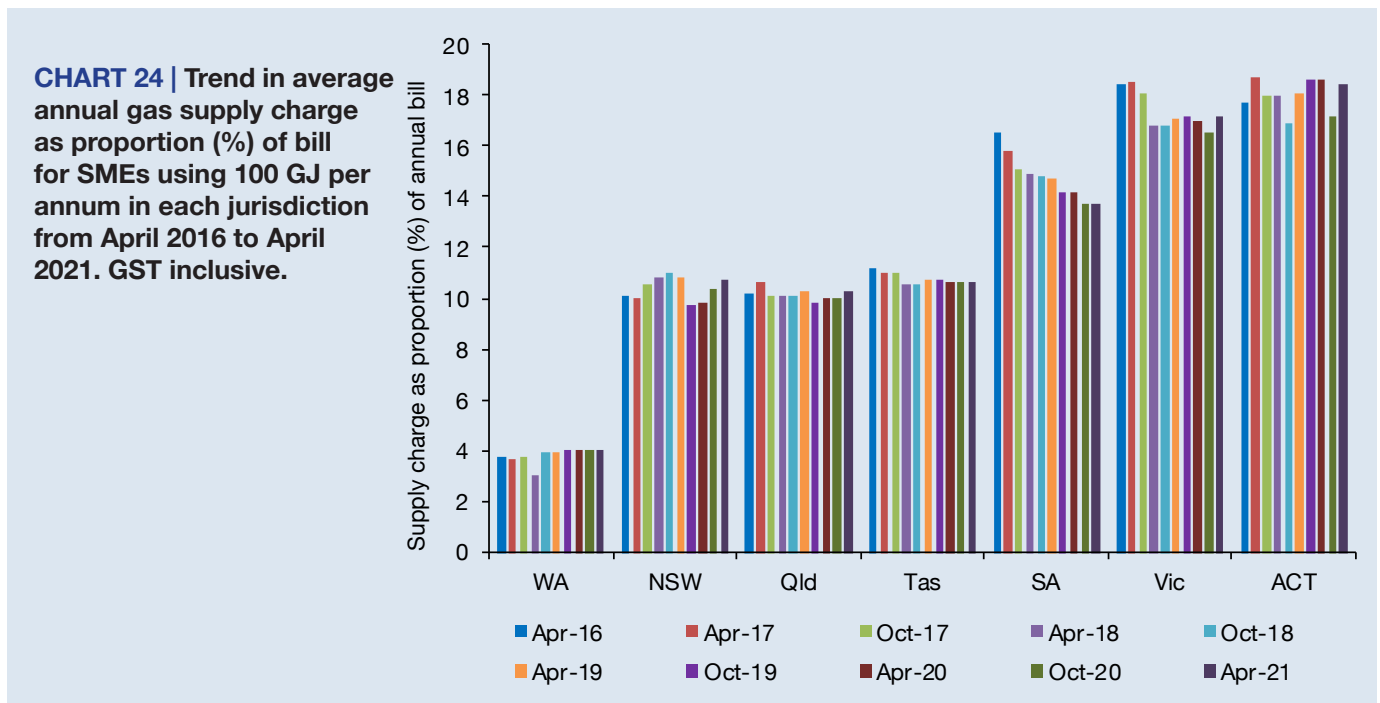
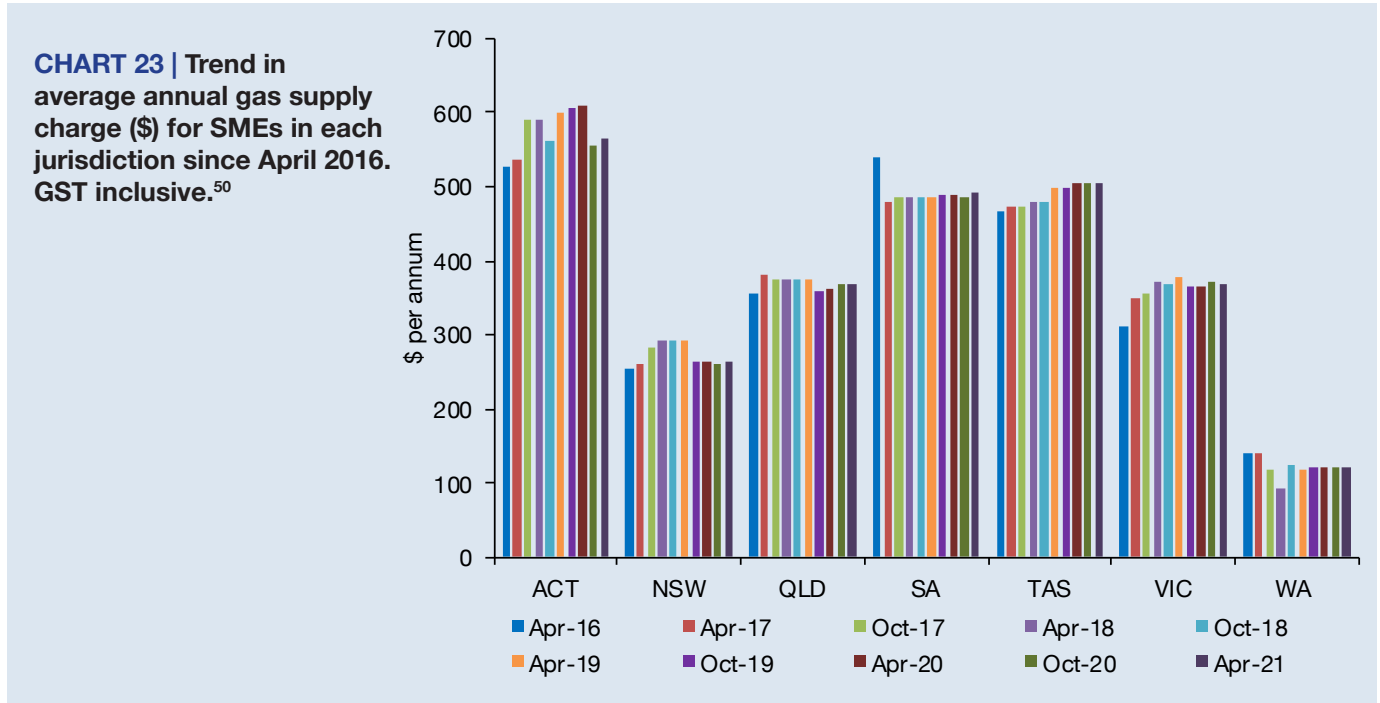


⁴⁸ Based on annual consumption of 100 GJ and analysis based on 9 retail offers in Victoria, 8 retailers in NSW and South Australia, 5 in Queensland, 4 in the ACT and 2 retailers in Tasmania. Analysis does not include WA as AGL and Origin are relatively new entrants in the WA gas retail market. As of April 2021, however, the maximum price-spread in WA was \$1,730.

⁴⁹ Jurisdictions without or only a few market offers have not been included in this analysis.

3.2.3 Fixed supply charge – gas

For gas supply charges, there are significant differences between jurisdictions. Fixed supply charges are highest in the ACT and lowest in Western Australia. Compared with the same period a year ago, fixed supply charges have decreased in the ACT (7%). In Queensland, Tasmania and Victoria, the supply charges have increased by a modest 1% to 2% since April 2020. Fixed supply charges as a proportion of the annual bill are highest in the ACT (18%) and lowest in Western Australia (4%).



⁵⁰ Based on the average supply charge for gas market offers. In WA, Alinta Energy and AGL's supply charges are inclusive of a daily Account Administration Fee as of April 2019, October 2019, April 2020, October 2020 and April 2021. In the April 2018 update, only Alinta explicitly stated that an Account Administration Fee applies. Origin's offers in WA do not mention this fee.

4. Jurisdictional analysis

This section analyses and compares electricity and gas offers available to small business customers in each of the jurisdictions. It compares price-spreads (maximum price differences between retail offers), the impact guaranteed and conditional pay on time discounts have on energy bills, and the network cost as a proportion of total electricity bills. It also highlights price changes (increases and/or decreases) that have occurred over both a six month and twelve-month period to April 2021,⁵¹ differences in annual bills (based on assumed consumption levels) between retailers, as well as between electricity networks and gas pricing zones within each jurisdiction.⁵²

Consistent with section 3 above, we assume an annual consumption level of 20,000 kWh⁵³ (single rate) for electricity and 100 GJ for gas. We stress that gas consumption varies significantly between jurisdictions and that the 100 GJ consumption level is a low consumption level in Victoria, medium in the ACT and South Australia, and high in Queensland. We note that the workbooks accompanying this report allow users to nominate their own consumption levels and we encourage all stakeholders to access the workbooks at: <https://energyconsumersaustralia.com.au/publications/our-research>.

4.1 New South Wales

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

NSW has three electricity networks and several gas pricing zones:

Electricity network and incumbent retailer	Area
Ausgrid (Energy Australia)	Inner Sydney, Northern Sydney, Swansea, Newcastle, Maitland, Cessnock, Singleton and Upper Hunter
Endeavour Energy (Origin)	Western Sydney, Wollongong, Blue Mountains, Lithgow, Kandos, Moss Vale, Nowra, Ulladulla
Essential Energy (Origin)	Rural and Regional NSW
NSW Gas zones and host retailer	Area
Jemena/Sydney (AGL)	Sydney, Newcastle, Wollongong, Blue Mountains
AGN (Origin)	Cooma and Bombala
	Temora, Holbrook, Henty, Culcairn and Walla Walla
	Tumut and Gundagai
	Wagga Wagga and Uranquity
	Albury, Moama and Jindera
	Murray Valley Towns
Central ranges (Origin)	Tamworth
Jemena/Capital Region (ActewAGL)	Boroowa, Goulburn, Yass and Young
Queanbeyan (ActewAGL)	Queanbeyan and Bundgendorre
Shoalhaven (ActewAGL)	Shoalhaven

⁵¹ As the last data collection of retail offers occurred in April 2021, offers as of April 2021 have been compared to offers in October 2020 (the previous data collection), and the trend over the twelve months since April 2020. As the electricity Network Use of System (NUOS) charges change on 1 January in Victoria and on 1 July in all other jurisdictions, the April data, and associated report, will typically reveal recent price changes in Victoria while the October data (and report) will highlight major price changes in the other jurisdictions.

⁵² Appendix A contains a list of the various retail offers used for this analysis.

⁵³ This consumption level for electricity is based on the NEM average, see Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

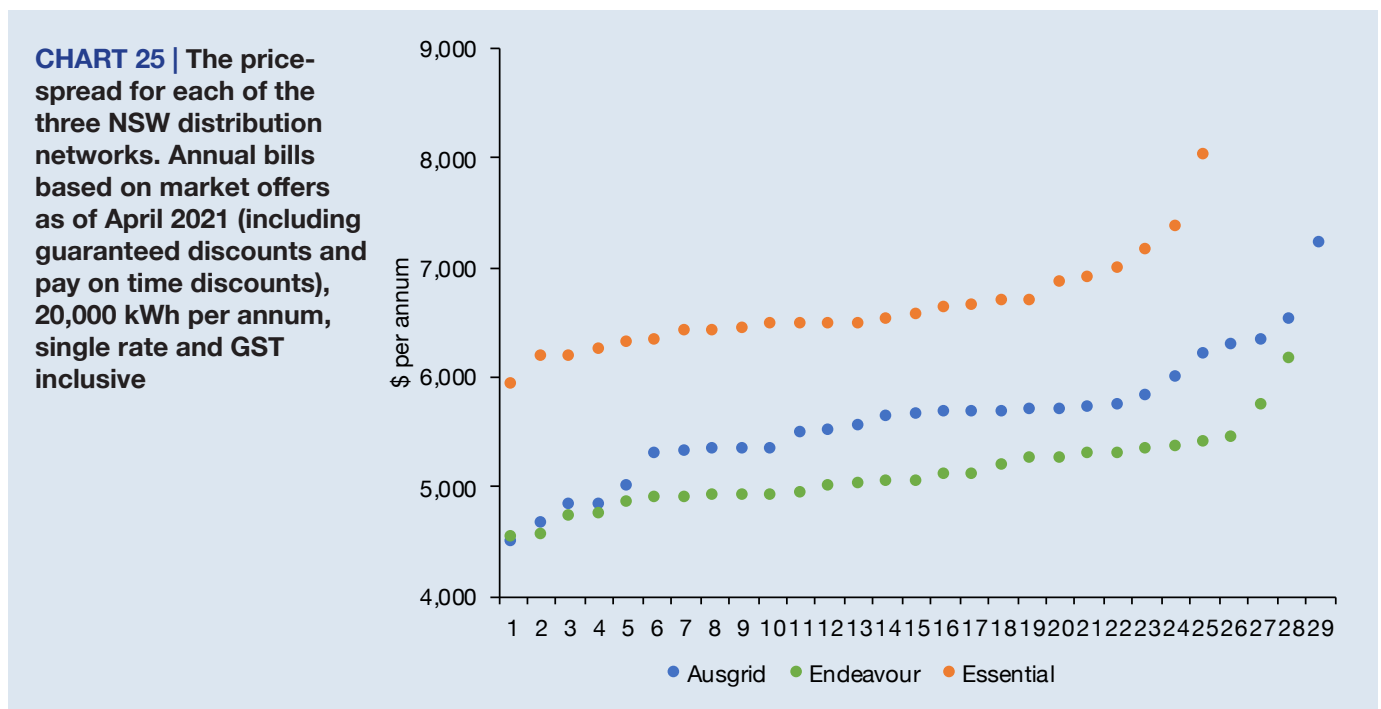
4.1.1 NSW electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO⁵⁴ shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Ausgrid network is 13,000 kWh per annum while the average consumption is 27,266 kWh in the Endeavour Energy network. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The price-spread

Chart 25 shows annual bills for SMEs consuming 20,000 kWh per annum (single rate) for 29 retailers across the three NSW distribution networks.⁵⁵ It shows that the typical annual bill for SMEs with this consumption level is between \$5,125 and \$6,635 (depending on network area).

It also shows that prices are highest in the Essential Energy network and lowest in Endeavour Energy. The maximum price-spread is greatest in Ausgrid where the difference between the lowest and the highest annual bill is \$2,715 compared to \$1,625 in the Endeavour Energy network. The average maximum price-spread for all three networks is approximately \$2,140. Compared to six months ago (October 2020), the average maximum price-spread has decreased by \$260.



Figures 1 - 3 below rank the retail offers from lowest to highest annual electricity bills in each of the three network areas.⁵⁶ The lowest annual retail bill in each network area has decreased or remained unchanged since October 2020. In Ausgrid and Endeavour Energy the best offer, as of April 2021, is the same as the best offer six months ago. In Essential Energy the best offer produces an annual bill that is \$80 less compared to six months ago.

⁵⁴ Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

⁵⁵ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

⁵⁶ These market offers were collected in April 2020 and it should be noted that retailers may change their rates at any time. Bill calculations based on SMEs using 20,000 kWh/annum (single rate). All bills are inclusive of guaranteed and pay on time discounts as well as GST. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

FIGURE 1 | Lowest to highest annual electricity bills for market offers in NSW's Ausgrid network (April 2021)























































	BlueNRG	\$4,523
	Powerclub	\$4,674
	ReAmped Energy	\$4,854
	Next Business Energy	\$4,857
	Energy Locals	\$5,022
	Bright Spark Power	\$5,322
	Alinta Energy	\$5,333
	CovaU	\$5,351
	AGL	\$5,354
	Tango Energy	\$5,364
	Locality Planning Energy	\$5,497
	1st Energy	\$5,530
	Momentum Energy	\$5,560
	Electricity in a box	\$5,645
	Enova Energy	\$5,681
	Glow Power	\$5,693
	Future X Power	\$5,696
	Red Energy	\$5,702
	Simply Energy	\$5,718
	EnergyAustralia	\$5,719
	Discover Energy	\$5,735
	Arc Energy Group	\$5,752
	Sumo Power	\$5,841
	Powerdirect	\$6,004
	Radian Energy	\$6,223
	Origin Energy	\$6,316
	Powershop	\$6,343
	Diamond Energy	\$6,536
	QEnergy	\$7,236

FIGURE 2 | Lowest to highest annual electricity bills for market offers in NSW's Endeavour Energy network (April 2021)

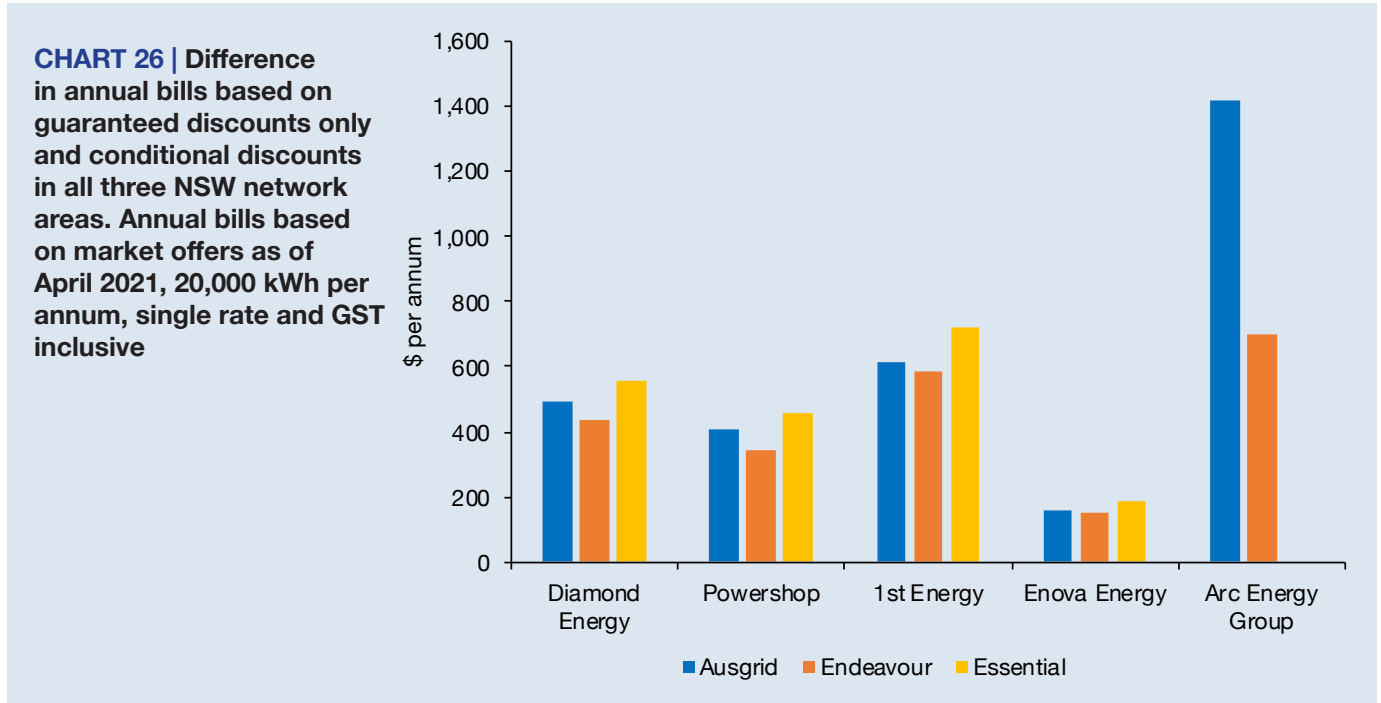
	BlueNRG	\$4,552
	Powerclub	\$4,574
	ReAmped Energy	\$4,755
	Next Business Energy	\$4,765
	Simply Energy	\$4,879
	Momentum Energy	\$4,913
	Energy Locals	\$4,924
	Tango Energy	\$4,928
	Bright Spark Power	\$4,940
	Glow Power	\$4,940
	Future X Power	\$4,962
	Arc Energy Group	\$5,026
	Alinta Energy	\$5,046
	Red Energy	\$5,060
	AGL	\$5,063
	Powerdirect	\$5,123
	Discover Energy	\$5,128
	CovaU	\$5,208
	Enova Energy	\$5,267
	1st Energy	\$5,273
	Locality Planning Energy	\$5,308
	Radian Energy	\$5,310
	Origin Energy	\$5,364
	Energy Australia	\$5,373
	Powershop	\$5,412
	Sumo Power	\$5,460
	Diamond Energy	\$5,768
	QEnergy	\$6,175

FIGURE 3 | Lowest to highest annual electricity bills for market offers in NSW's Essential Energy network (April 2021)

	Powerclub	\$5,952
	ReAmped Energy	\$6,203
	Next Business Energy	\$6,209
	Energy Locals	\$6,268
	Bright Spark Power	\$6,322
	Simply Energy	\$6,351
	AGL	\$6,432
	Momentum Energy	\$6,438
	Alinta Energy	\$6,463
	Glow Power	\$6,487
	1st Energy	\$7,614
	Red Energy	\$6,497
	Future X Power	\$6,506
	Locality Planning Energy	\$6,547
	EnergyAustralia	\$6,592
	Tango Energy	\$6,652
	Powerdirect	\$6,672
	Enova Energy	\$6,703
	Discover Energy	\$6,705
	CovaU	\$6,882
	Radian Energy	\$6,913
	Origin Energy	\$7,001
	Powershop	\$7,162
	Diamond Energy	\$7,381
	QEnergy	\$8,037

Additional discounts

Five of the twenty-nine retailers operating in NSW offer conditional pay on time discounts. For customers using 20,000kWh per annum the conditional discount can be worth up to \$1,415 (Arc Energy Group's offer in the Ausgrid network). Other retailers with conditional discounts are Diamond Energy, Powershop, 1st Energy and Enova Energy.⁵⁷ Chart 26 below shows the difference between annual bills that include guaranteed discounts only compared to annual bills that include conditional pay on time discounts (only retailers that offer conditional discounts are included in this Chart).



Charts 27 - 29 show annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discounts for all three network areas. It shows that six retailers, CovaU, Energy Australia, Origin Energy, Simply Energy, 1st Energy and Discover Energy, offer significant guaranteed discounts. These retailers, however, also have some of the highest base rates.⁵⁸ The charts also compare the market offers to the DMO and they show that none of the retailers have market offers (inclusive of discounts) that produce bills that are higher than the DMO.

⁵⁷ Note that Powershop's conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing "specials". Arc Energy Group's offers in Ausgrid include a 22% off usage charges for customers that pay on time while the discount is 13% in Endeavour. They do not currently have offers in the Essential network.

⁵⁸ Origin Energy and Powershop's discounts are applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

CHART 27 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Ausgrid network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive

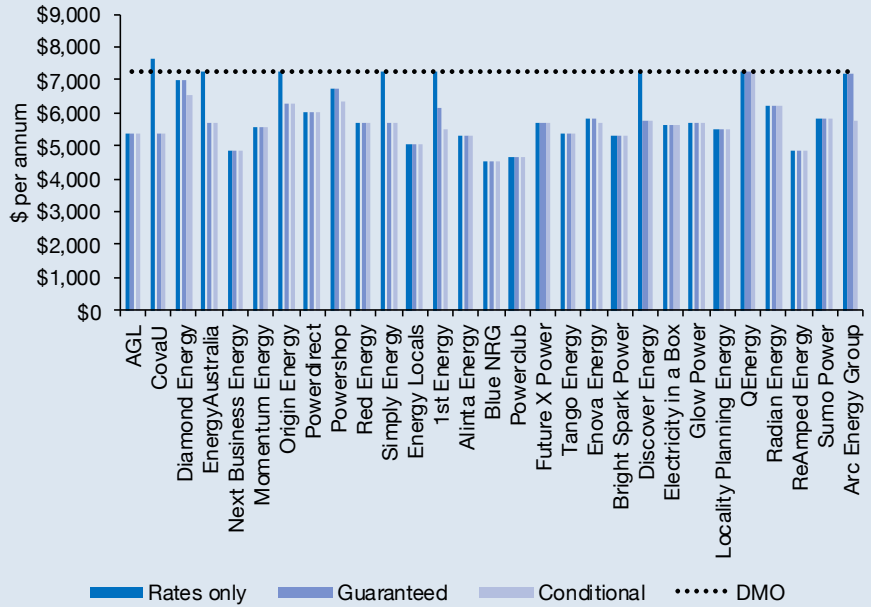


CHART 28 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Endeavour Energy network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive

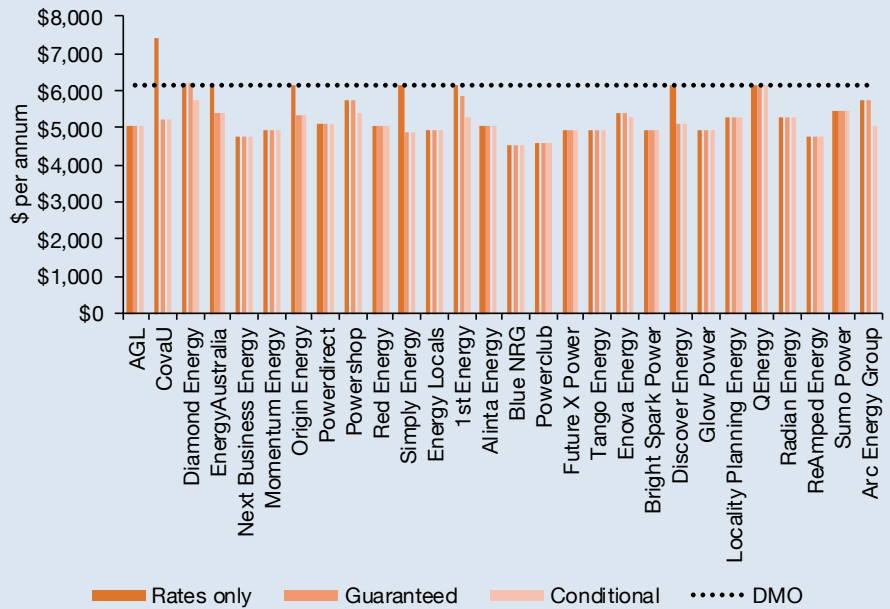
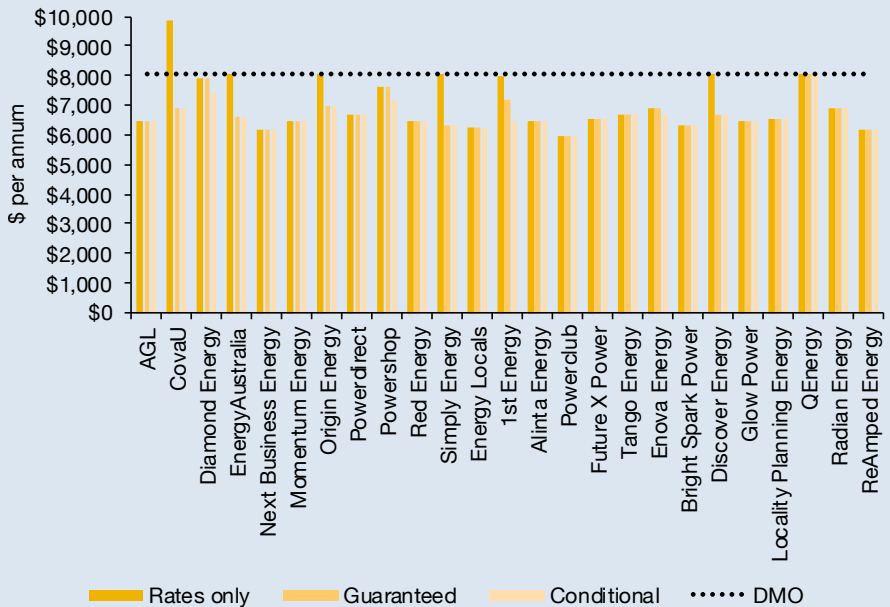


CHART 29 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the DMO in NSW's Essential Energy network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive

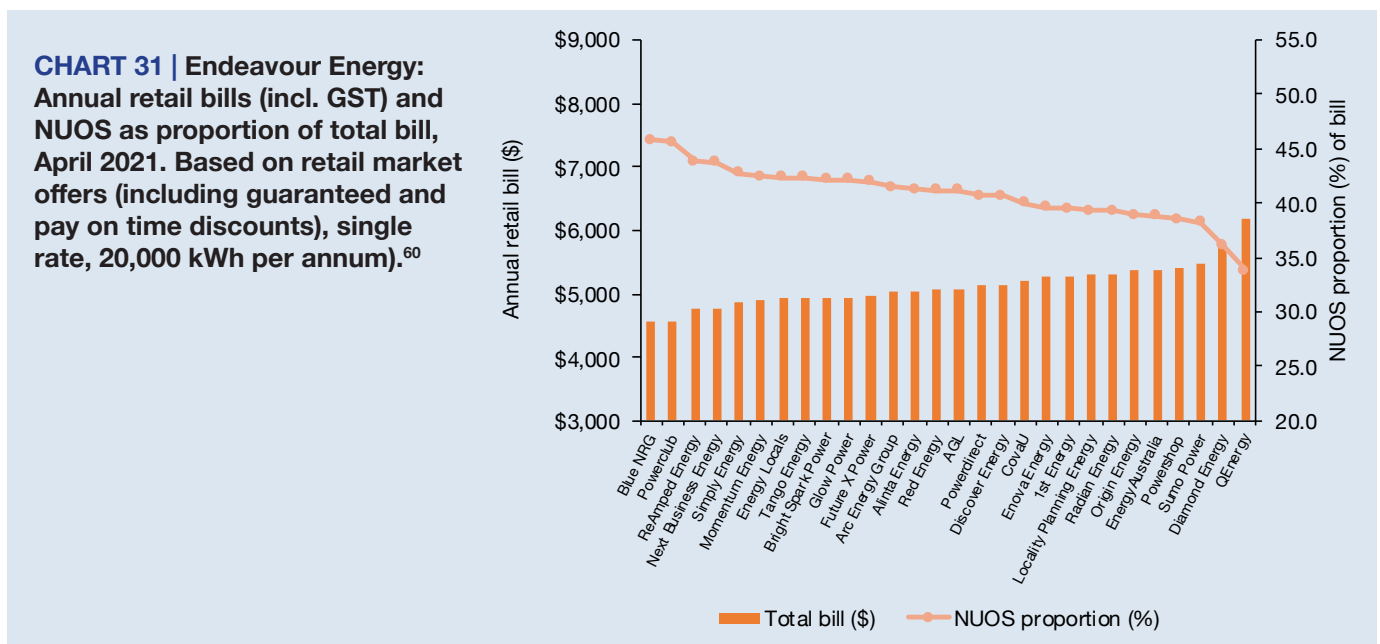
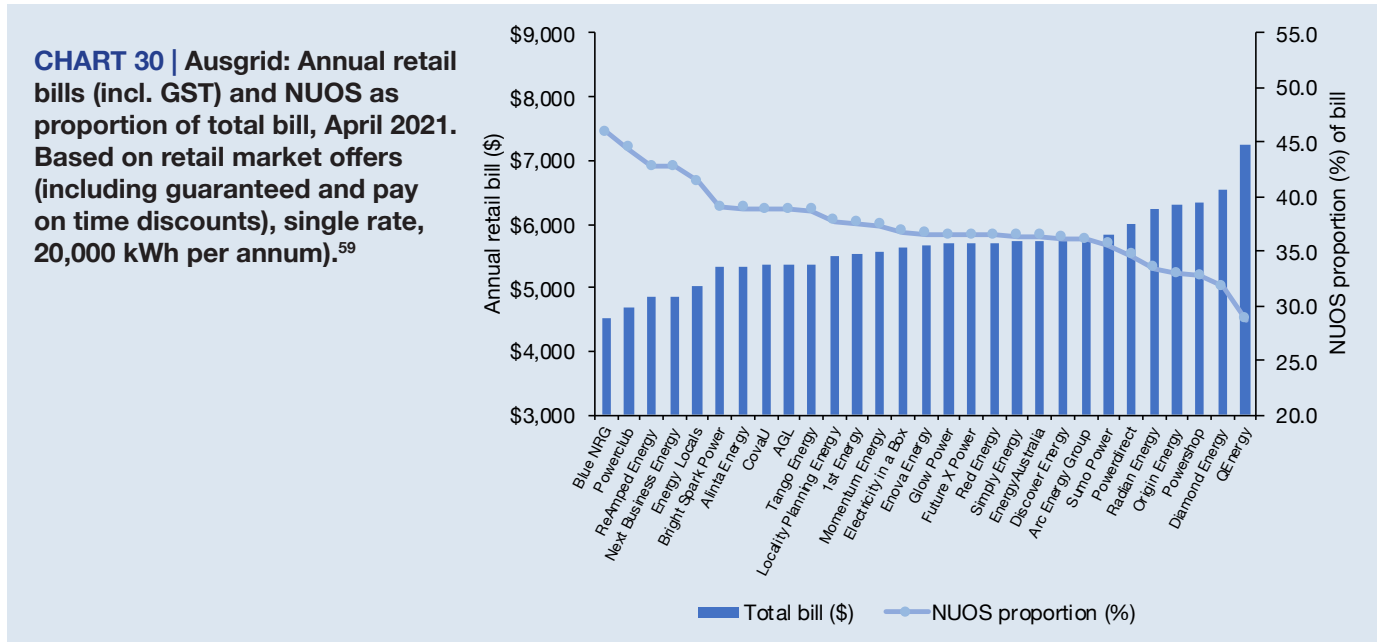


Network charges

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

The charts presented in this section show that the NUOS proportion of bills varies significantly between retail offers. In the Essential network, for example, the NUOS proportion of the bill for Powerclub's customers is almost 54% while the NUOS is less than 40% of the total bill for QEnergy's customers.

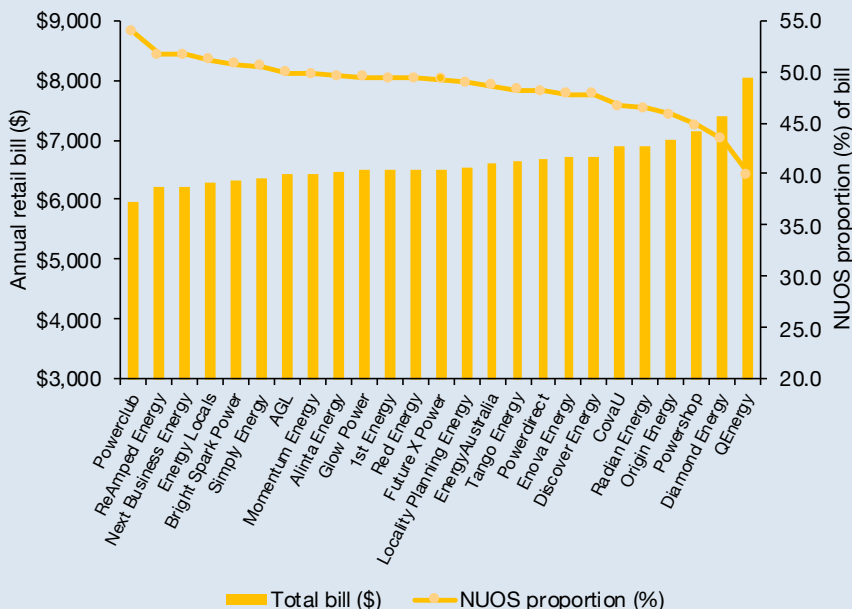
Charts 30 - 32 show annual retail bills (columns) and NUOS as proportion of annual bill (dotted line) for each of the three network areas.



⁵⁹ Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Ausgrid's charges (tariff EA 050) for the 2020/21 financial year. The NUOS also includes fixed charges.

⁶⁰ Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Endeavour Energy's charges (tariff N 90) for the 2020/21 financial year. The NUOS also includes fixed charges.

CHART 32 | Essential Energy: Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum).⁶¹



4.1.2 NSW gas bills April 2021

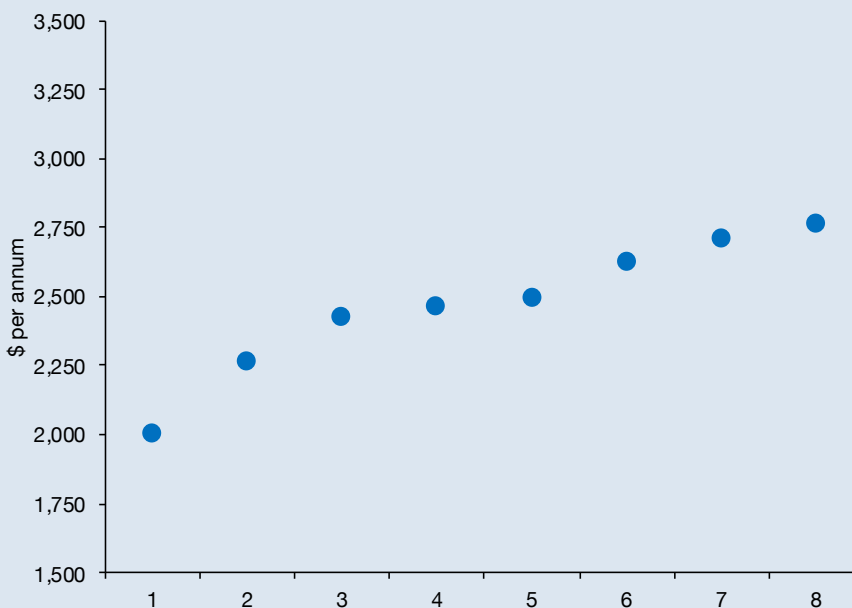
To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill).⁶² Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

The price-spread

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

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$2,470 (including discounts). Chart 33 shows annual bills for eight retailers in the Jemena/AGL (Sydney) gas zone and that the maximum price-spread is approximately \$760 per annum. The maximum price-spread has remained unchanged over the last six months (since October 2020).

CHART 33 | The price-spread in the Jemena/AGL (Sydney) gas zone. Annual bills based on market offers as of April 2021 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive.



⁶¹ Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Essential Energy’s charges (tariff BLNN 1AU) for the 2020/21 financial year. The NUOS also includes fixed charges.

⁶² See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

Figure 4 below ranks the retail offers from lowest to highest annual gas bills in the Jemena/Sydney gas zone.⁶³

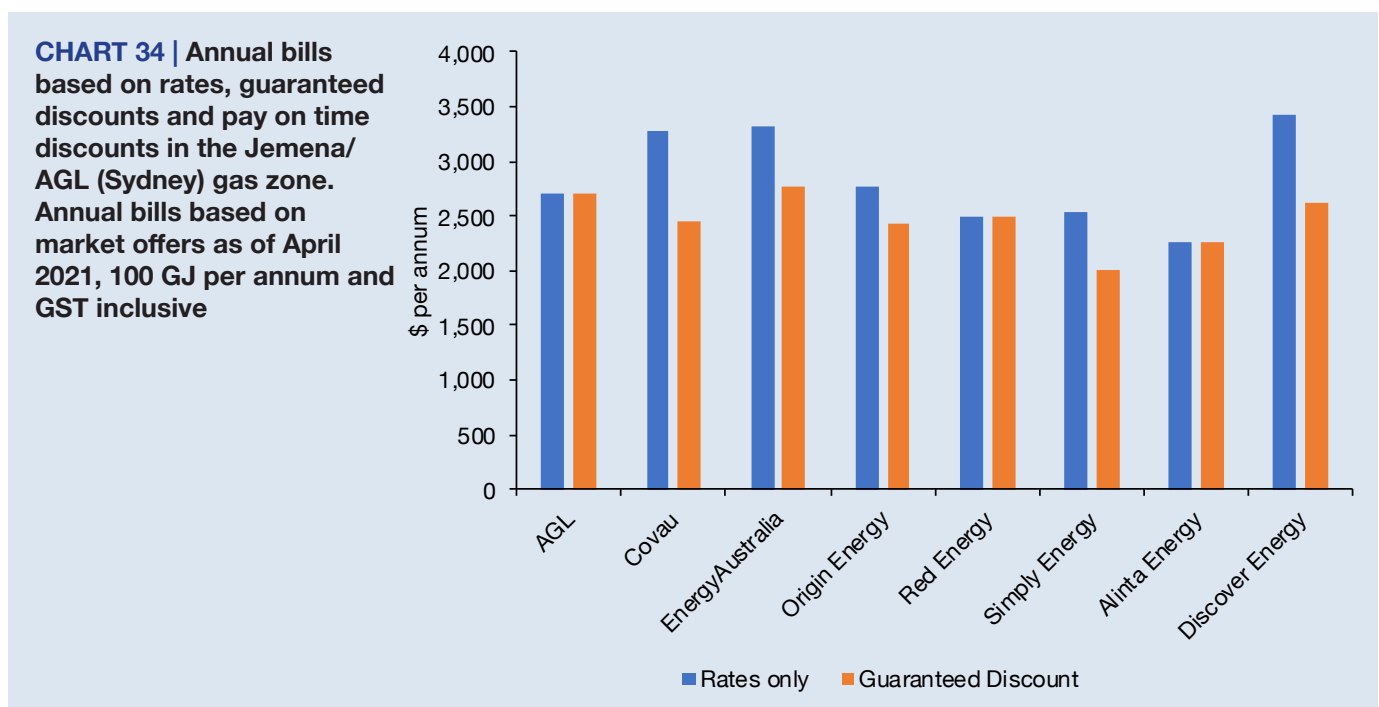
FIGURE 4 | Lowest to highest annual gas bills (incl GST) for market offers in the **Jemena/AGL (Sydney) gas zone (April 2021)**. Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Simply Energy	\$2,003
	Alinta Energy	\$2,265
	Origin Energy	\$2,428
	Covau	\$2,461
	Red Energy	\$2,499
	Discover Energy	\$2,624
	AGL	\$2,712
	EnergyAustralia	\$2,763

Additional discounts

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

Chart 34 shows annual bills based on their rates only and inclusive of guaranteed discounts in the Jemena/AGL (Sydney) gas zone. It shows that Alinta Energy is the retailer that produces the lowest bill based on rates only. For bills inclusive of guaranteed discounts, however, Simply Energy's offer produces the lowest bill.



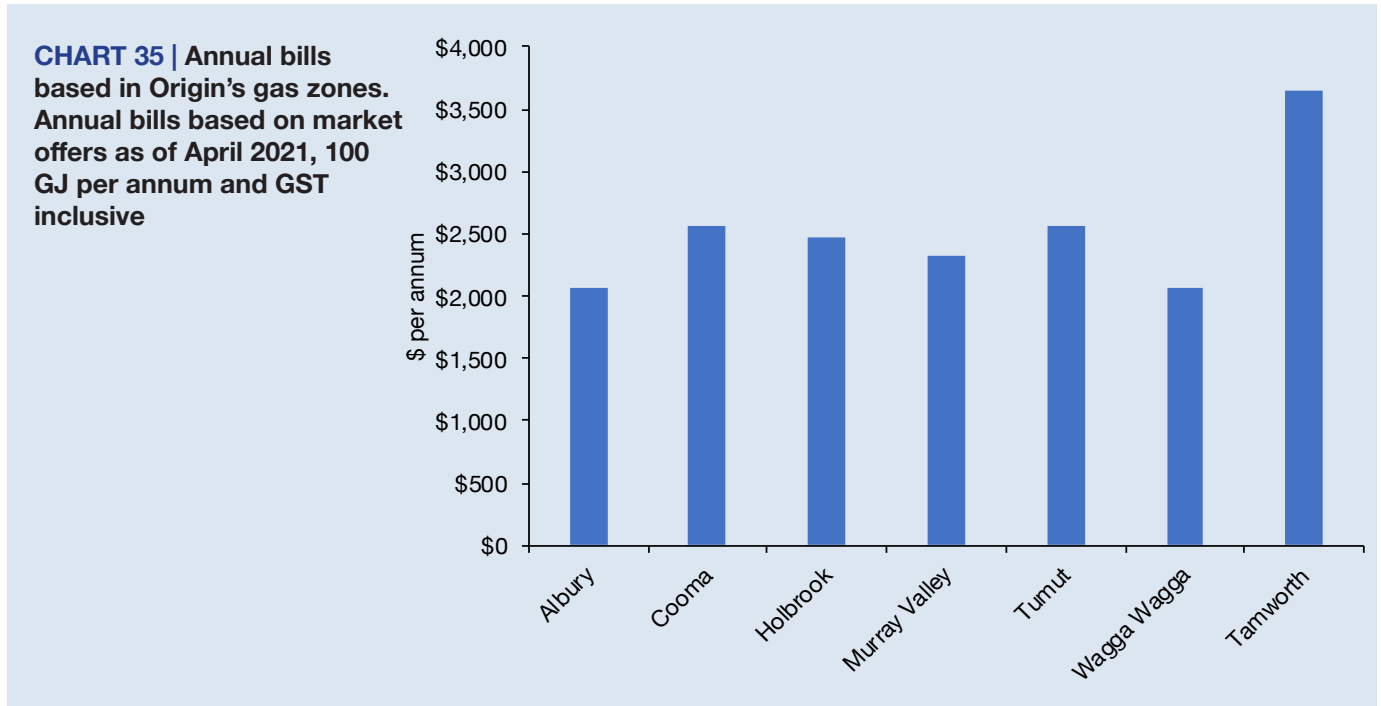
Regional NSW

The Australian Gas Network (AGN) covers six different pricing zones in regional NSW and Origin Energy is the incumbent retailer. Origin Energy is also the incumbent retailer in the Tamworth gas zone. In

⁶³ These market offers were collected on the 9th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

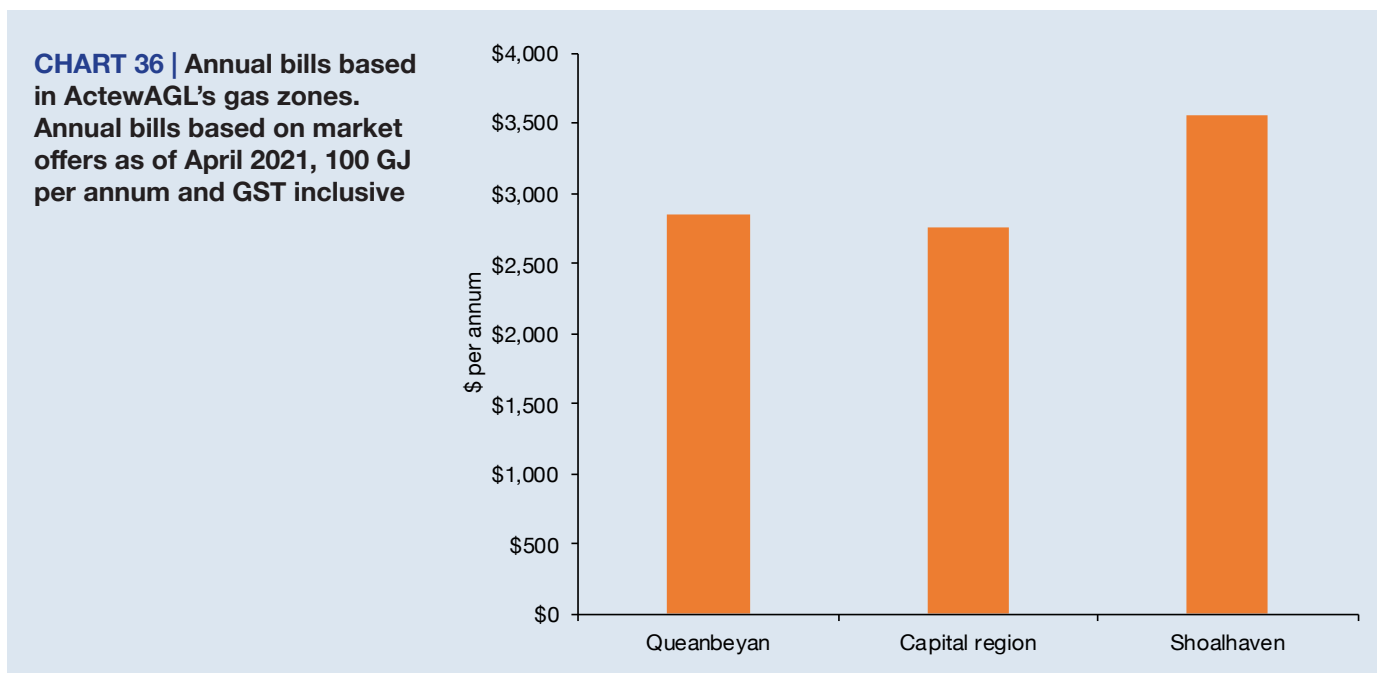
addition to Origin Energy’s market offers, AGL, Energy Australia and Red Energy also have offers in some of these price zones.

Chart 35 shows annual bills for Origin’s market offers (discounts included) in the AGN pricing zones. Origin’s market offers produce annual bills from approximately \$2,070 (in Wagga Wagga) to \$3,655 (Tamworth) for customers consuming 100 GJ per annum. Energy Australia and AGL also offer gas market offers in the Albury and Murray Valley gas zones. However, both Energy Australia and AGL’s offers produce annual bills that are higher than Origin’s. Red Energy offers gas in the Tumut and Cooma pricing zones, but these gas offers produce significantly higher bills than Origin Energy.



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

Chart 36 shows annual bills for ActewAGL’s offers in these three pricing zones. ActewAGL’s offers produce annual bills from approximately \$2,750 (in Capital region) to \$3,550 (Shoalhaven) for customers consuming 100 GJ per annum. Energy Australia also offers gas market offers in the Queanbeyan region gas zone. Energy Australia’s offers produce annual bills that are \$180 less than ActewAGL’s offer in Queanbeyan.

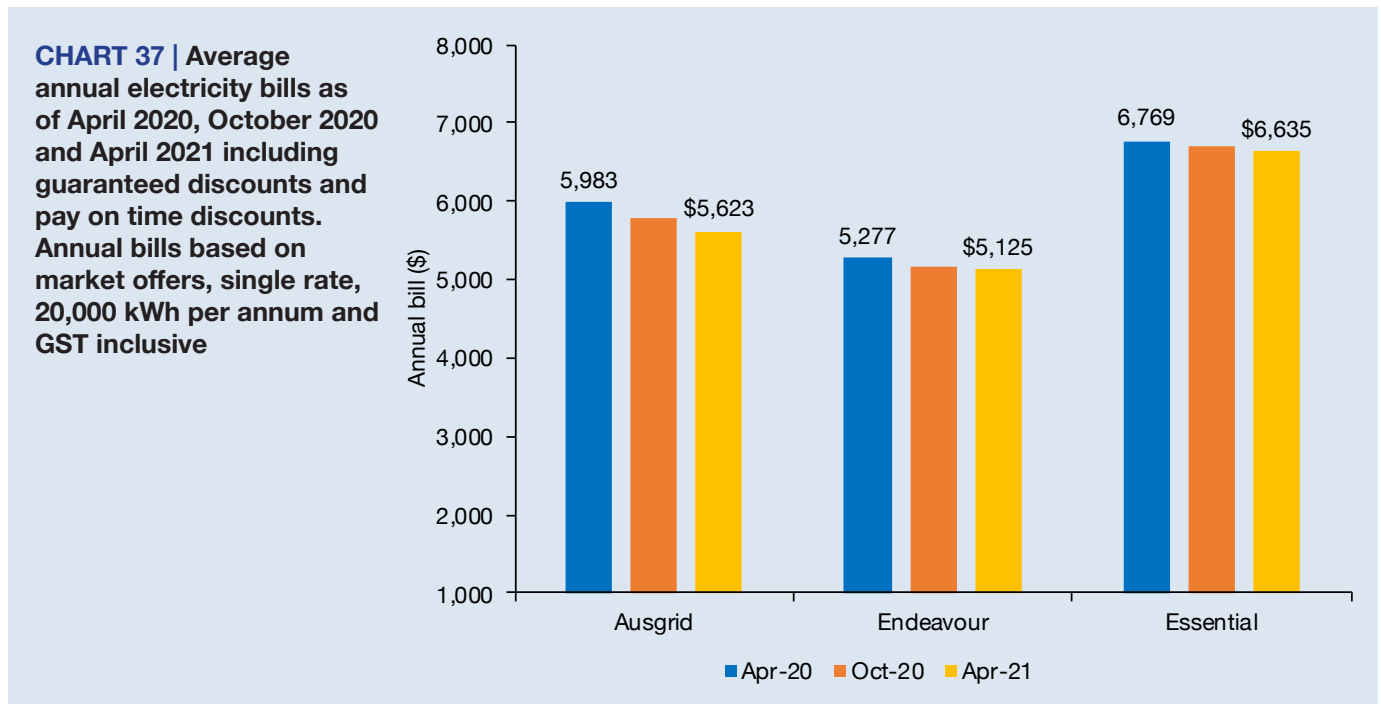


4.1.3 Changes in energy bills in NSW

The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months from April 2020 to April 2021.

In NSW, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months. However, some retailers have still changed their offers (rates, discounts or both).

On average, bills have decreased between 2% and 6% (depending on network area) since April 2020. Chart 37 below shows average annual bills as of April 2020, October 2020 and April 2021.



In the Ausgrid network, the annual bills for Electricity in a Box, Reamped Energy and Alinta Energy have decreased by 29%, 9% and 8% respectively since October 2020. AGL, Red Energy and 1st Energy's bills have decreased by 6%. Bright Spark Energy, Origin Energy and Glow Power have also had small price decreases. None of the retailers have increased their prices in the Ausgrid network over the last six months. See Chart 38.

In the Endeavour network, 1st Energy and Reamped Energy have decreased their bills by 5% over the last six months. Red Energy, Alinta Energy, Discover Energy, Bright Spark Energy, Origin Energy and Glow Power have also had small price decreases. As in Ausgrid, none of the retailers have increased their prices in the Ausgrid network over the last six months. See Chart 39.

In the Essential network, 1st Energy and Reamped Energy have decreased their bills by around 5%. Alinta Energy, AGL, Red Energy, Locality Planning Energy, Origin Energy, Enova Energy and Glow Power have also had small price decreases. Tango Energy and Bright Spark Energy, on the other hand, have had slight bill increases. See Chart 40.

Charts 38 to 40 below show changes (\$) to the retailers' bills (columns) as well as percentage changes (marker) for each network area.⁶⁴

⁶⁴ Note that only retailers that have changed their offers during the period are included in these charts.

CHART 38 | Ausgrid bill changes: Comparison of October 2020 and April 2021 annual electricity bills including guaranteed discounts and pay on time discounts in the Ausgrid network. Annual bills based on market offers, 20,000 kWh per annum, single rate and GST inclusive

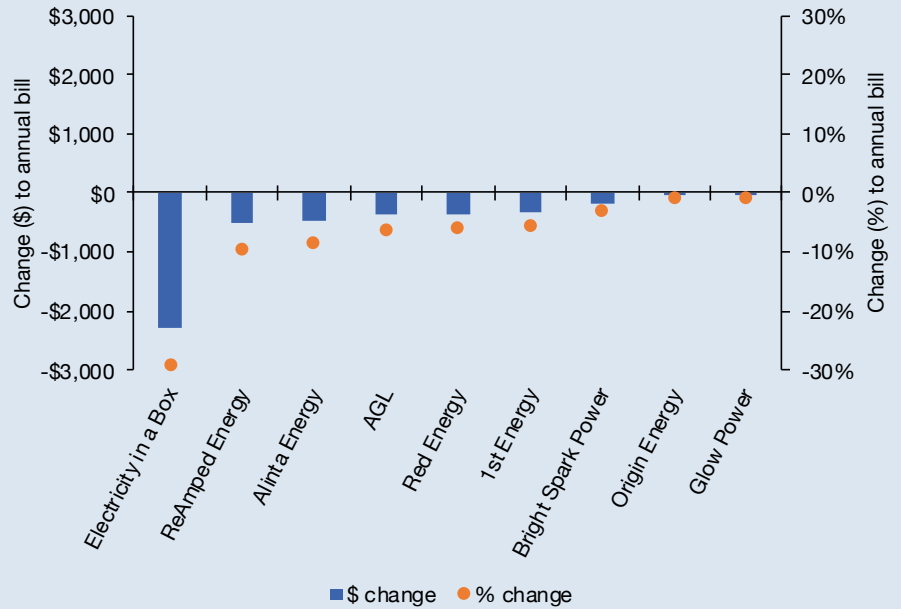


CHART 39 | Endeavour Energy bill changes: Comparison of October 2020 and April 2021 annual electricity bills including guaranteed discounts and pay on time discounts in the Endeavour Energy network. Annual bills based on market offers, 20,000 kWh per annum, single rate and GST inclusive

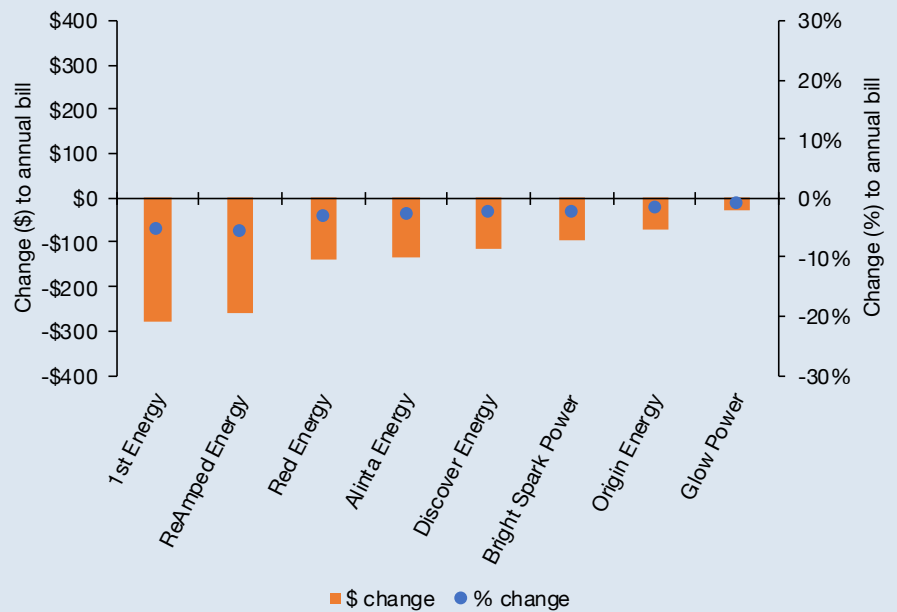
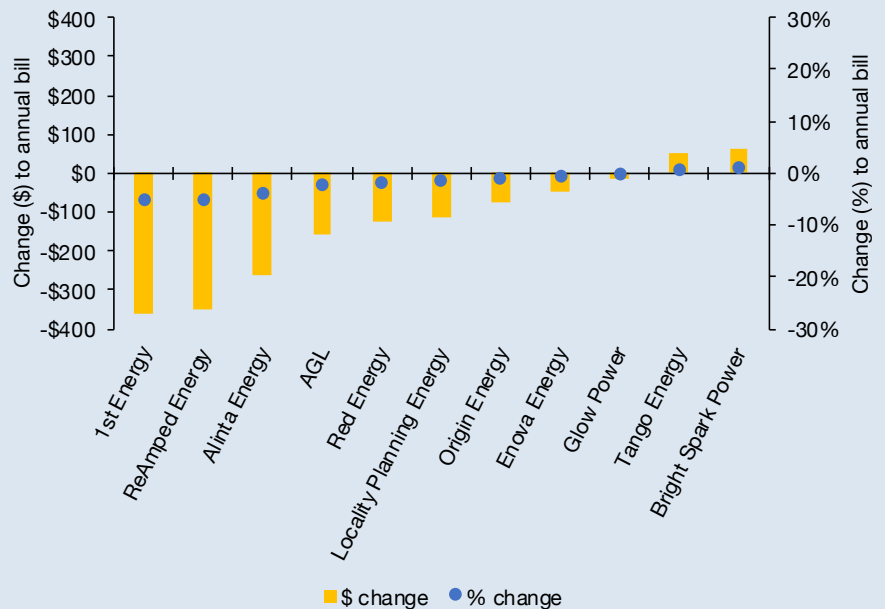
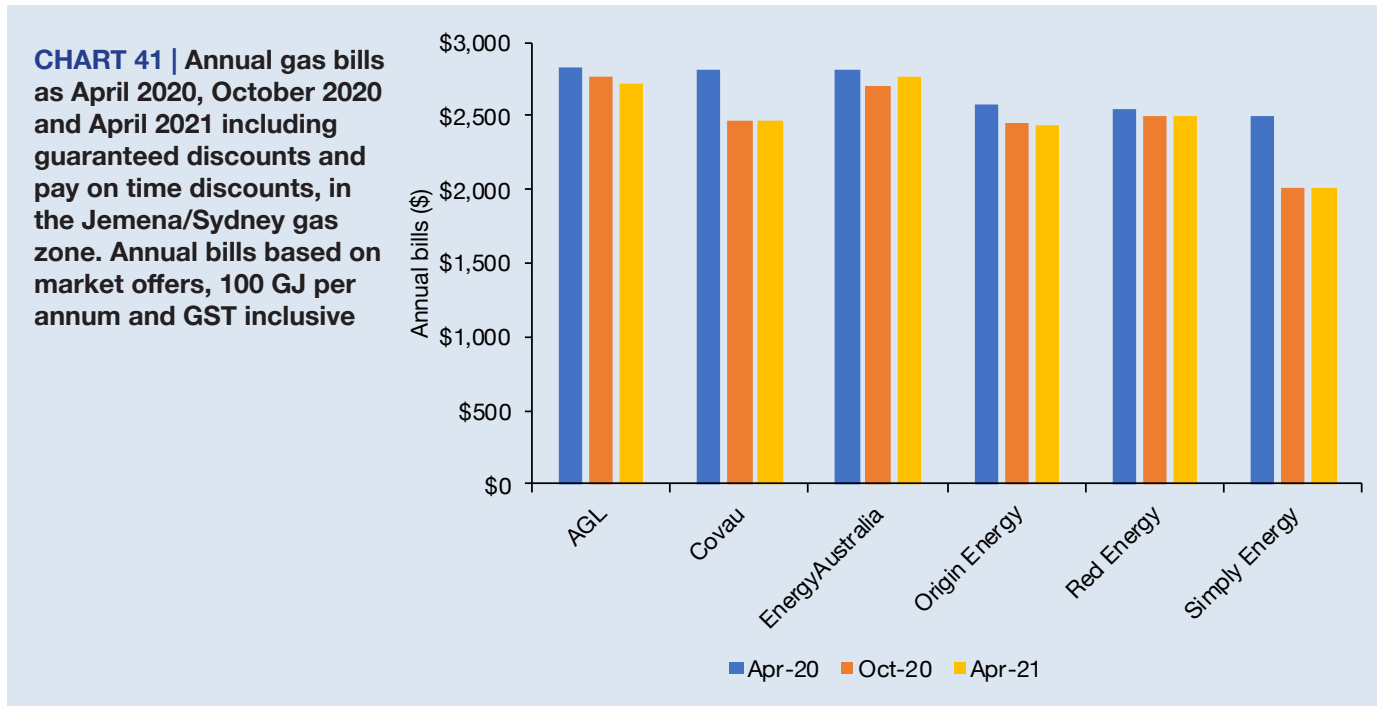


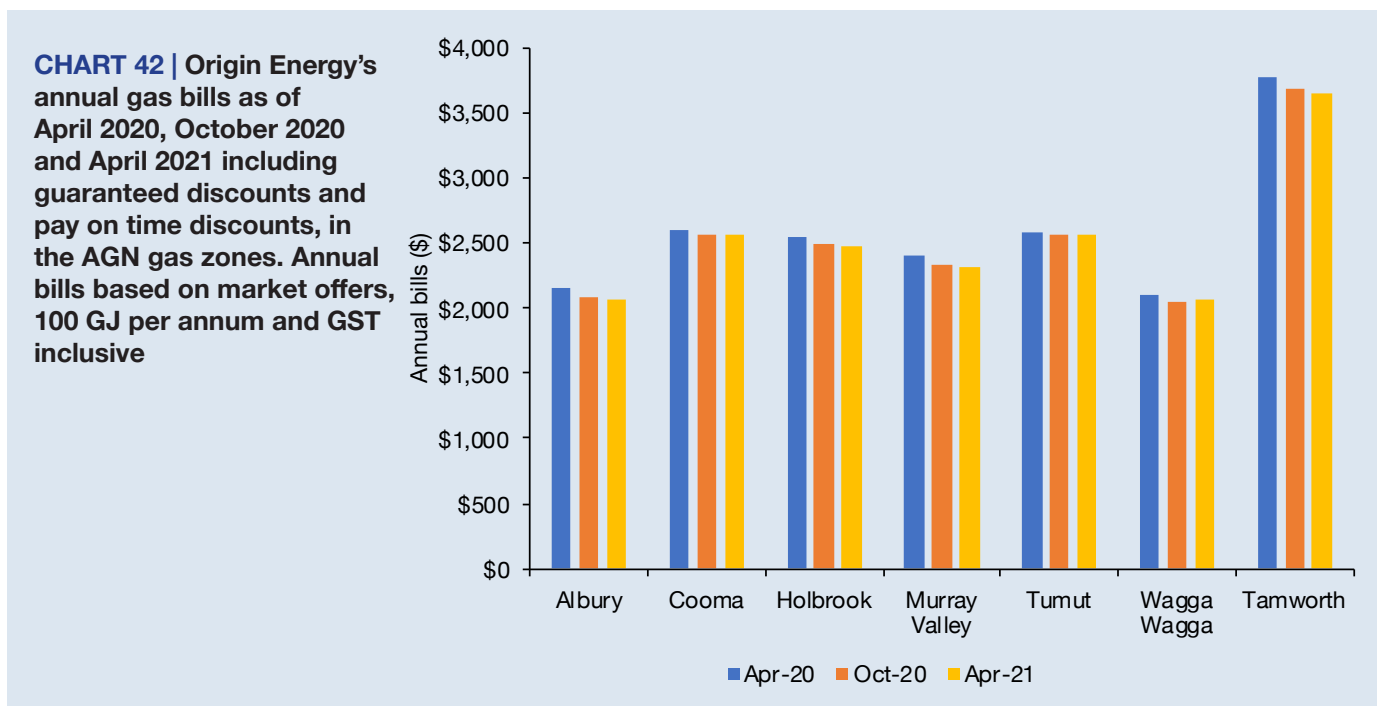
CHART 40 | Essential Energy bill changes: Comparison of October 2020 and April 2021 annual electricity bills including guaranteed discounts and pay on time discounts in the Essential Energy network. Annual bills based on market offers, 20,000 kWh per annum, single rate and GST inclusive



In relation to gas, two retailers (AGL and Origin) have decreased their gas offer since April 2020 in the Sydney/Jemena pricing zone and one (Energy Australia) has increased. See Chart 41 below.

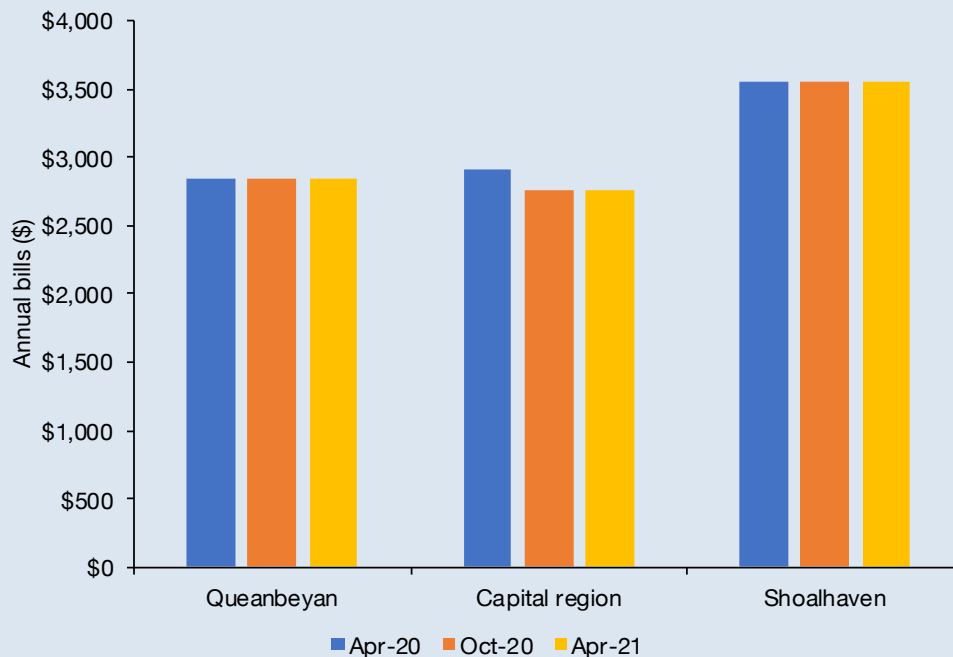


In terms of the many smaller NSW pricing zones, Origin and ActewAGL are the main retailers (although AGL, Energy Australia and Red Energy do have offers in some of these zones). Between October 2020 and April 2021, Origin's market offers decreased slightly (less than 1%) in all pricing zones except for Wagga Wagga. See Chart 42.



Between October 2020 and April 2021, ActewAGL's prices remained unchanged in all three pricing zones. See Chart 43.

CHART 43 | ActewAGL's annual gas bills as of April 2020, October 2020 and April 2021 including guaranteed discounts and pay on time discounts. Annual bills based on market offers, 100 GJ per annum and GST inclusive

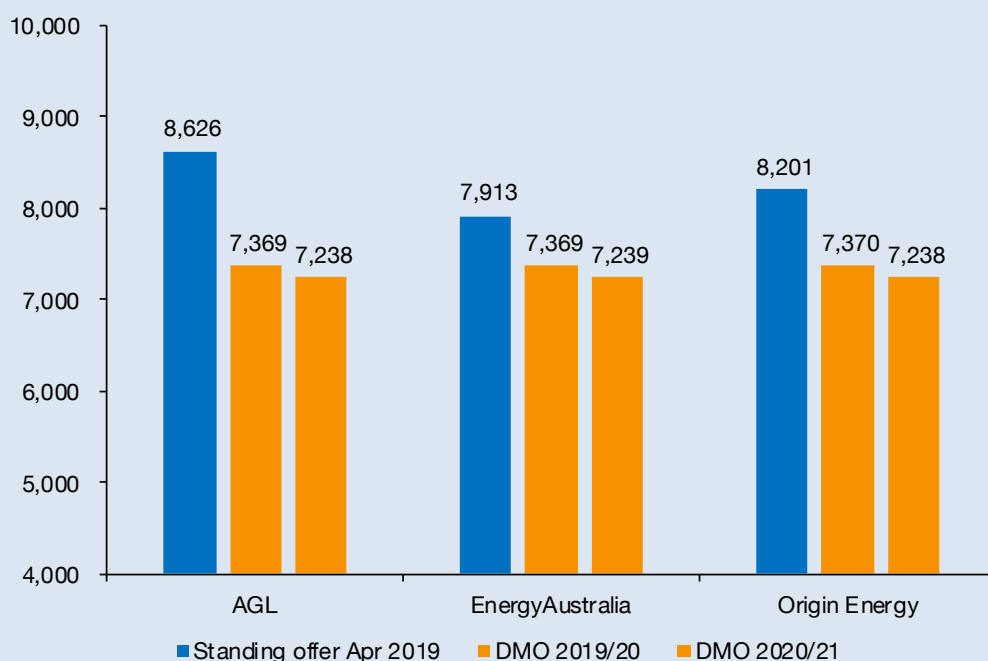


4.1.4 Impact of the DMO

Since the introduction of the DMO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously. Furthermore, as shown in section 4.1.3 above, the average market offer bill has continued to decrease in all three network areas in April 2021 and none of the retail market offers, inclusive of guaranteed discounts, produce annual bills that are greater than the DMO. See section 4.1.1 above.⁶⁵

Businesses previously on a standing offer with one of the 'big 3' retailers (AGL, Energy Australia and Origin Energy) experienced significant bill reductions since the introduction of the DMO on 1 July 2019. Charts 44 – 46 below compare AGL, Energy Australia and Origin Energy's standing offers prior to the DMO taking effect to the DMO as of 2019/20 and 2020/21. They show that the bills are currently between \$510 and \$1,390 less compared to April 2019 (depending on the network and retailer) for businesses using 20,000 kWh per annum. AGL's bills in Ausgrid and Essential have reduced the most while Origin Energy's bill reduction in the Endeavour network is more modest.

CHART 44 | The DMO compared to the 'big 3' retailers' standing offers in the Ausgrid network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



⁶⁵ Market offer bills including guaranteed discounts compared to the DMO in each network area.

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

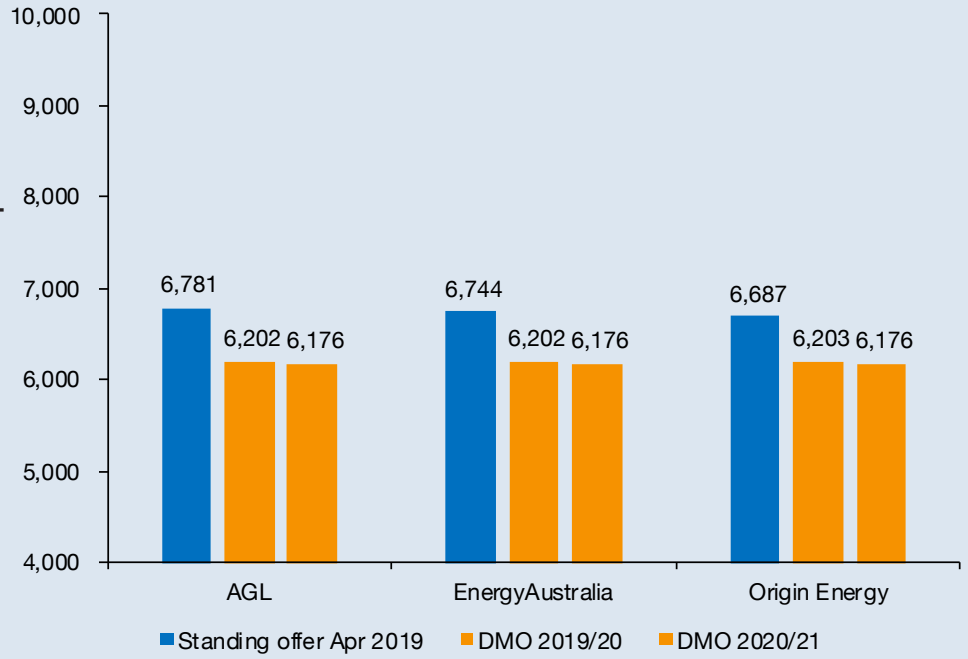
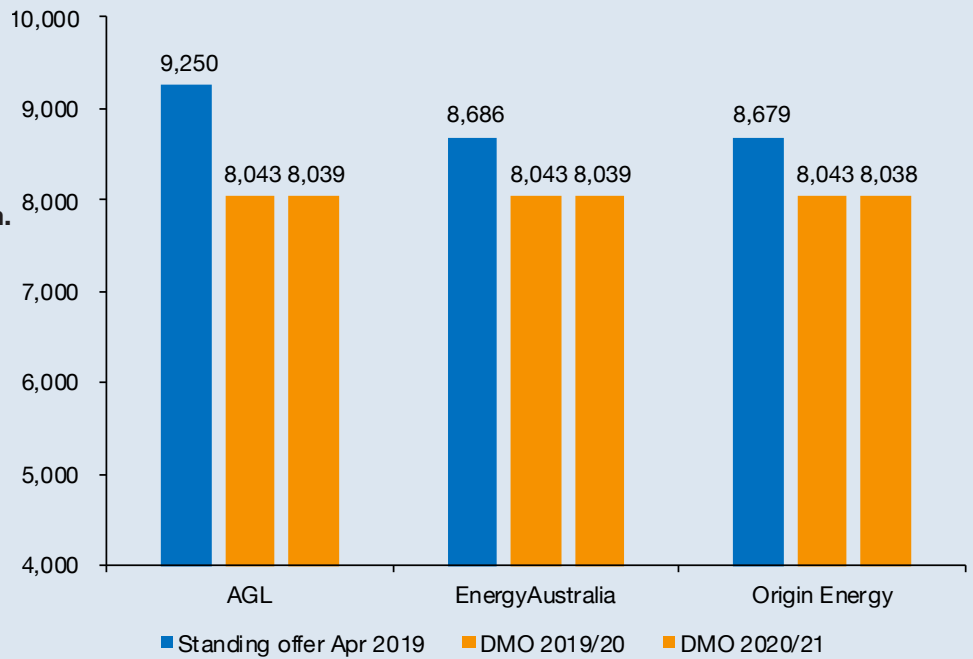


CHART 46 | The DMO compared to the 'big 3' retailers' standing offers in the Essential Energy network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive



4.2 Victoria

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

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

Electricity network and incumbent retailer	Area
Citipower (Origin)	Inner city, inner North and Eastern suburbs
Powercor (Origin)	Outer Western suburbs and Western Victoria
Ausnet Services (Energy Australia)	Outer Northern and Eastern suburbs and Eastern Victoria
Jemena (AGL)	Inner West and North Western Suburbs
United Energy (AGL)	South Eastern suburbs and Mornington Peninsula
Gas zones and incumbent retailer	Area
Multinet 1 (Origin)	Eastern and South Eastern suburbs
Multinet 2 (AGL)	Bayside and outer South Eastern suburbs
Ausnet Services Central 1 (Energy Australia)	Outer Western suburbs, Geelong and Bellarine Peninsula
Ausnet Services Central 2 (AGL)	Western and North Western suburbs
Ausnet Services West (Energy Australia)	Macedon Ranges, Bendigo, Ballarat and Western Victoria
AGN Central 1 (Origin)	Frankston, Mornington Peninsula and Gippsland
AGN Central 2 (Energy Australia)	CBD, inner city and North Eastern suburbs
AGN North (Origin)	Northern and North Eastern Victoria

4.2.1 Victorian electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO⁶⁶ shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, the network specific average consumption for small businesses is:

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

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

The price-spread

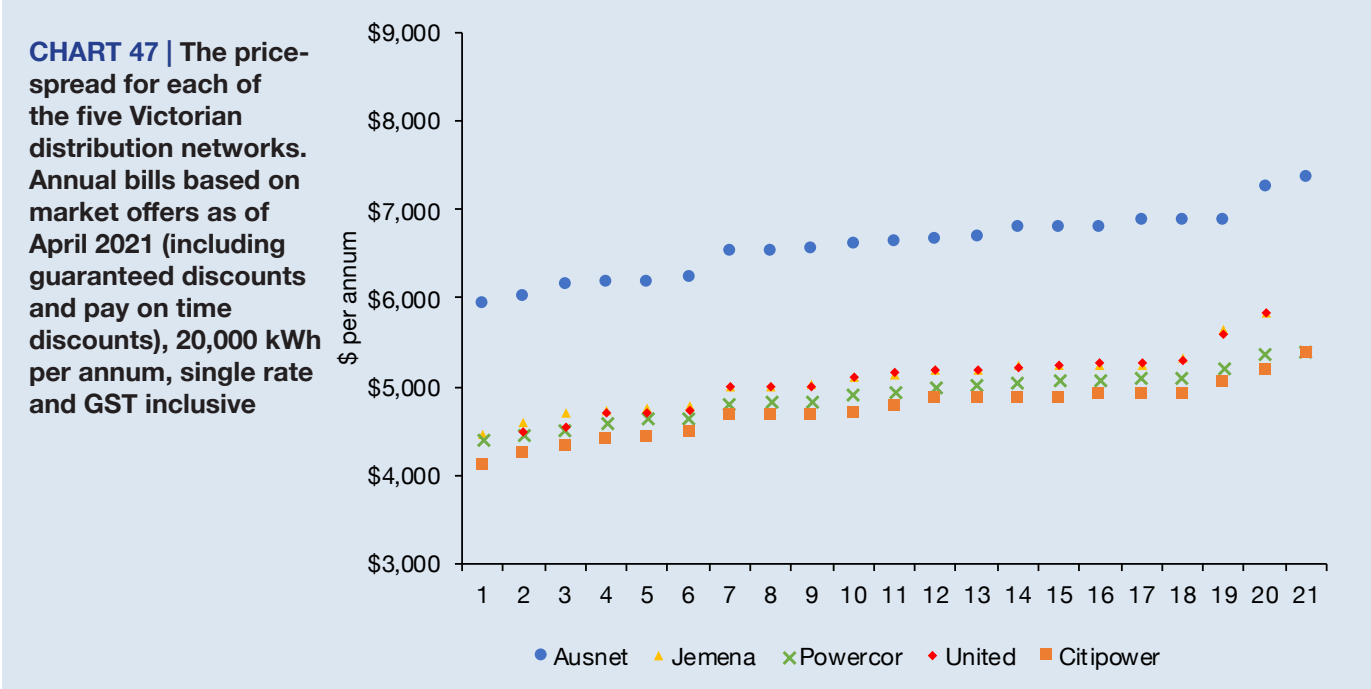
The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is between \$4,735 and \$6,605 (depending on network area).⁶⁷ Chart 47 shows annual bills for SMEs consuming 20,000 kWh per annum (single rate) for 21 retailers across the five Victorian distribution networks.⁶⁸ It shows that bills are

⁶⁶ Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

⁶⁷ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

⁶⁸ There are less available offers (20) in Jemena and United Energy.

highest in the Ausnet Services network and lowest in Citipower and that the offers in Citipower, Jemena, Powercor and United Energy network areas are quite similar. The maximum price-spread is currently greatest in the United Energy network where the difference between the lowest and the highest annual bill is approximately \$1,730. Compared to six months ago (October 2020), the maximum price-spread has decreased in all network areas. In Ausnet Services, where the decrease is greatest, the maximum price-spread is \$1,080 less than six months ago. It decreased by \$665 in the Powercor network area whereas it has decreased by \$550 in United Energy, \$340 in the Jemena and \$325 in Citipower network.



Figures 5 - 9 below rank the retail offers from lowest to highest annual electricity bills in each of the five network areas.⁶⁹ The lowest annual retail bill in each network area has changed since October 2020. In United Energy, the best offer, as of April 2021, produces an annual bill that is \$605 less than the best offer six months ago while in Ausnet Services it is approximately \$35 more than the best offer six months ago.

⁶⁹ These market offers were collected on the 18th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

FIGURE 5 | Lowest to highest annual electricity bills (incl GST) for market offers in Victoria's **Citipower network** (April 2021) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)



















	Powerclub	\$4,125
	Next Business Energy	\$4,241
	Q Energy	\$4,340
	Tango Energy	\$4,400
	Simply Energy	\$4,437
	1st Energy	\$4,486
	AGL	\$4,683
	EnergyAustralia	\$4,683
	Energy Locals	\$4,684
	Alinta Energy	\$4,716
	Powerdirect	\$4,781
	Momentum Energy	\$4,861
	Lumo Energy	\$4,864
	CovaU	\$4,873
	Red Energy	\$4,881
	Origin Energy	\$4,923
	GloBird Energy	\$4,930
	Powershop	\$4,930
	Blue NRG	\$5,044
	Diamond Energy	\$5,181
	Sumo Power	\$5,368

FIGURE 6 | Lowest to highest annual electricity bills (incl GST) for market offers in Victoria's **Powercor network** (April 2021) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)






	Powerclub	\$4,388
	Next Business Energy	\$4,461
	Tango Energy	\$4,510
	Simply Energy	\$4,583
	1st Energy	\$4,635
	Q Energy	\$4,643
	Alinta Energy	\$4,814
	EnergyAustralia	\$4,838
	AGL	\$4,839
	Energy Locals	\$4,910
	Powerdirect	\$4,939
	CovaU	\$4,983
	Momentum Energy	\$5,021
	Red Energy	\$5,040
	Lumo Energy	\$5,074
	Origin Energy	\$5,082
	GloBird Energy	\$5,093
	Powershop	\$5,093
	Blue NRG	\$5,194
	Diamond Energy	\$5,372
	Sumo Power	\$5,386

FIGURE 7 | Lowest to highest annual electricity bills (incl GST) for market offers in Victoria's **Ausnet Services network** (April 2021), including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)






















	Next Business Energy	\$5,940
	Powerclub	\$6,025
	Tango Energy	\$6,146
	Lumo Energy	\$6,173
	Simply Energy	\$6,196
	1st Energy	\$6,239
	AGL	\$6,540
	EnergyAustralia	\$6,542
	Q Energy	\$6,573
	Energy Locals	\$6,622
	Blue NRG	\$6,644
	Powerdirect	\$6,678
	Alinta Energy	\$6,703
	Red Energy	\$6,796
	Momentum Energy	\$6,799
	CovaU	\$6,812
	Powershop	\$6,874
	Origin Energy	\$6,878
	GloBird Energy	\$6,886
	Diamond Energy	\$7,270
	Sumo Power	\$7,376

FIGURE 8 | Lowest to highest annual electricity bills (incl GST) for market offers in Victoria's **Jemena network** (April 2021) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)









































	Powerclub	\$4,470
	Next Business Energy	\$4,588
	Tango Energy	\$4,720
	Simply Energy	\$4,731
	Q Energy	\$4,748
	1st Energy	\$4,775
	EnergyAustralia	\$4,994
	AGL	\$4,994
	Energy Locals	\$5,033
	Powerdirect	\$5,097
	CovaU	\$5,143
	Momentum Energy	\$5,184
	Red Energy	\$5,200
	Origin Energy	\$5,240
	Alinta Energy	\$5,256
	GloBird Energy	\$5,256
	Powershop	\$5,256
	Lumo Energy	\$5,322
	Diamond Energy	\$5,634
	Sumo Power	\$5,834

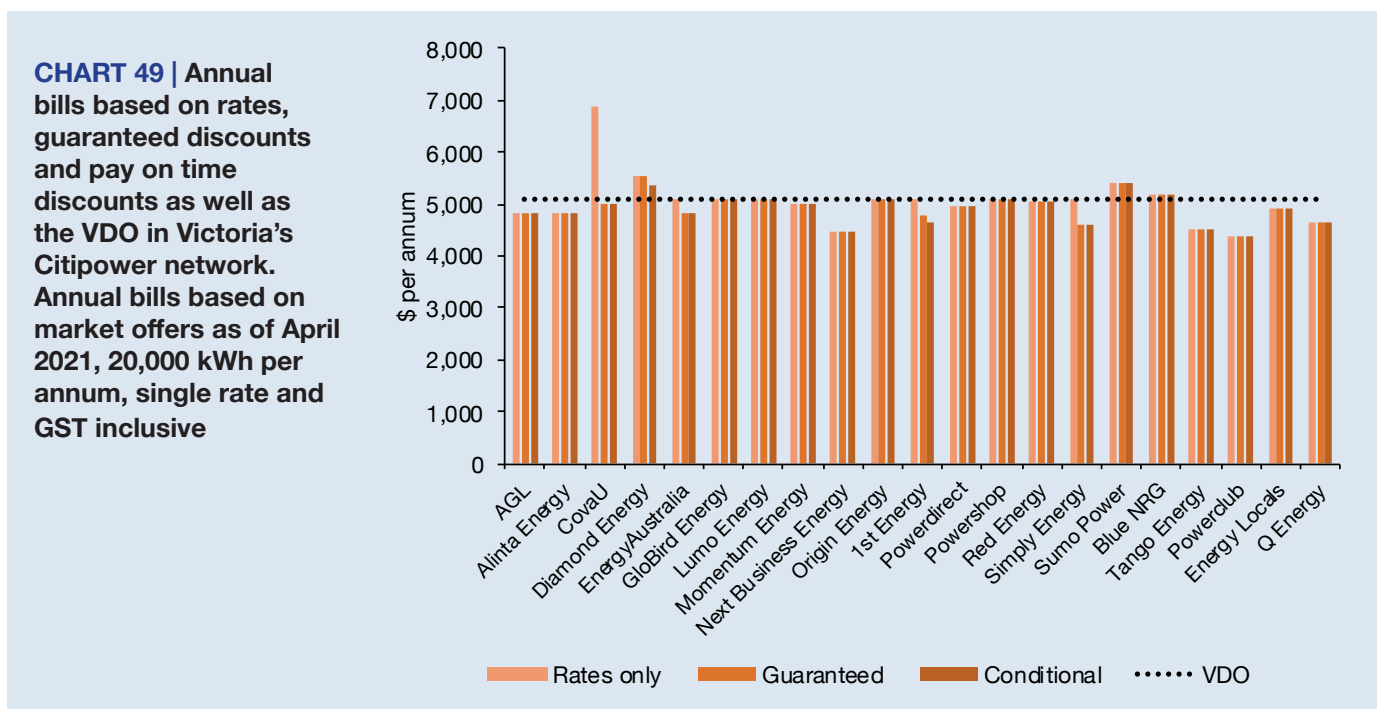
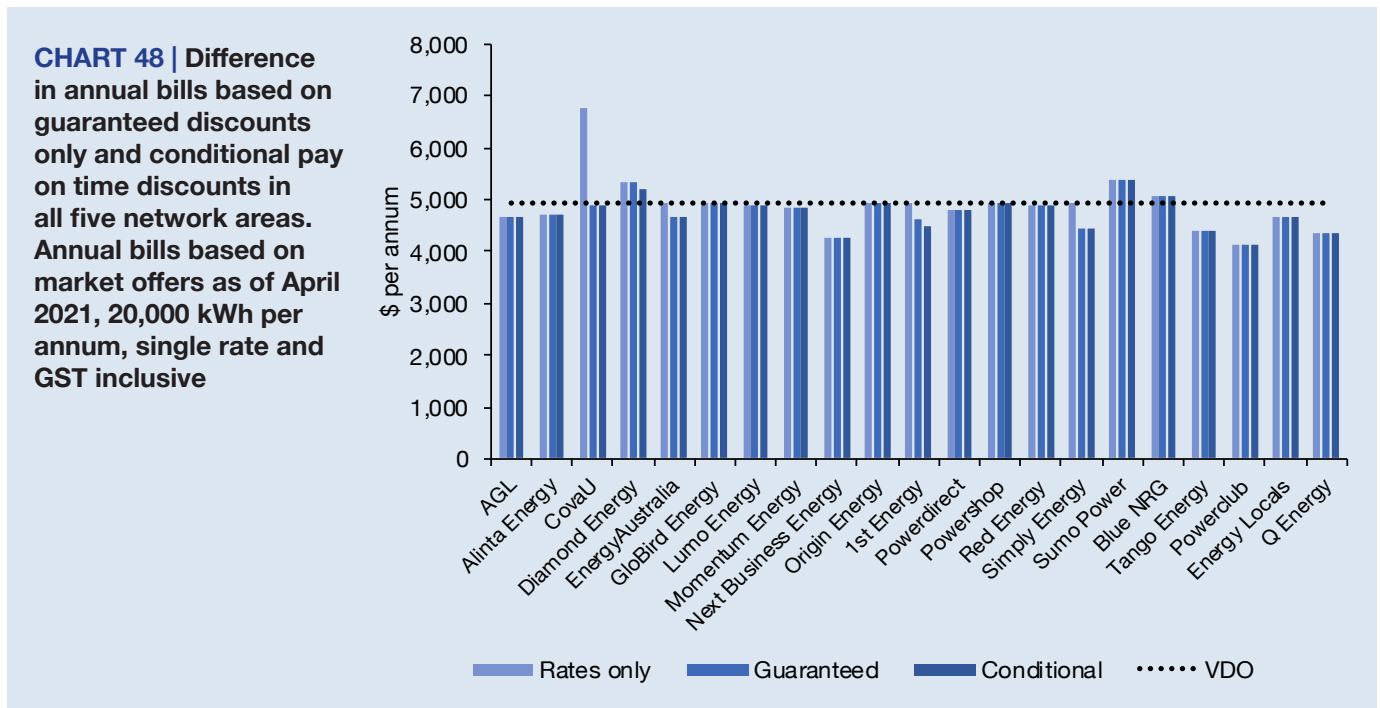
FIGURE 9 | Lowest to highest annual electricity bills (incl GST) for market offers in Victoria's **United Energy network** (April 2021) including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Powerclub	\$4,107
	1st Energy	\$4,486
	Next Business Energy	\$4,556
	Q Energy	\$4,698
	Tango Energy	\$4,720
	Simply Energy	\$4,740
	AGL	\$5,004
	EnergyAustralia	\$5,005
	Energy Locals	\$5,015
	Powerdirect	\$5,111
	CovaU	\$5,155
	Red Energy	\$5,195
	Momentum Energy	\$5,200
	Alinta Energy	\$5,230
	Origin Energy	\$5,247
	GloBird Energy	\$5,269
	Powershop	\$5,269
	Lumo Energy	\$5,293
	Diamond Energy	\$5,585
	Sumo Power	\$5,840

Additional discounts

Only 2 of the 21 retailers operating in Victoria offer conditional pay on time discounts (down from five in October 2020 and eight in April 2020). Diamond Energy and 1st Energy are the retailers that continue to offer pay on time discounts and for customers using 20,000kWh per annum the conditional discount can be worth up to \$225 (Diamond Energy’s offer in Ausnet Services). This is, however, significantly less than a six months ago (October 2020) when the difference was \$870 and a year ago (April 2020) when the difference was \$1,115.

Four retailers (CovaU, Energy Australia, 1st Energy and Simply Energy) offer guaranteed discounts while the remaining 16 retailers do not offer any additional discounts.⁷⁰ Charts 48 – 52 show annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discounts for all five network areas. They also compare the market offers to the VDO and while many offers produce bills that are lower than the VDO, Diamond Energy and Sumo Power’s offers are consistently higher than the VDO.



⁷⁰ 1st Energy’s offers include both a guaranteed and a pay on time discount. Note that discounts based on direct debit payments have not been included in this analysis.

CHART 50 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Powercor network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive

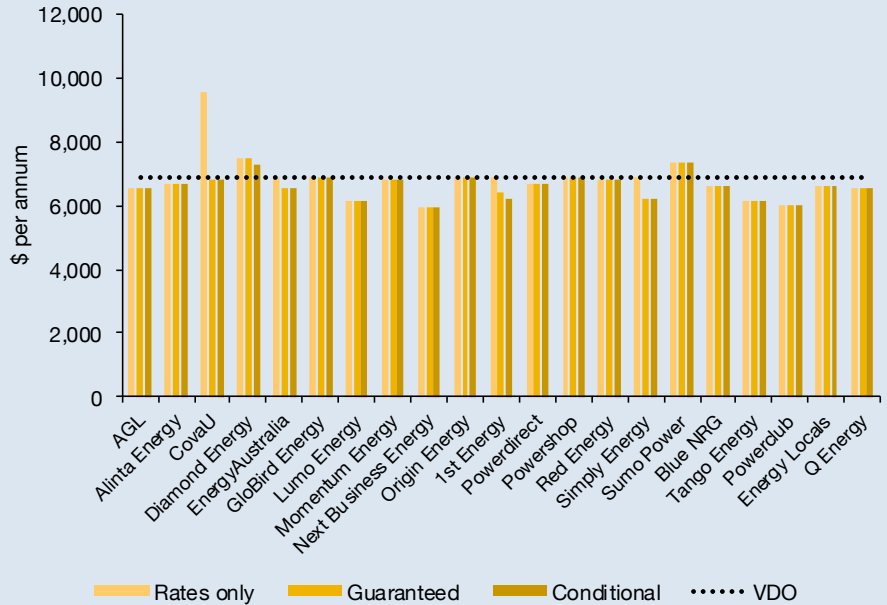


CHART 51 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Ausnet Services network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive

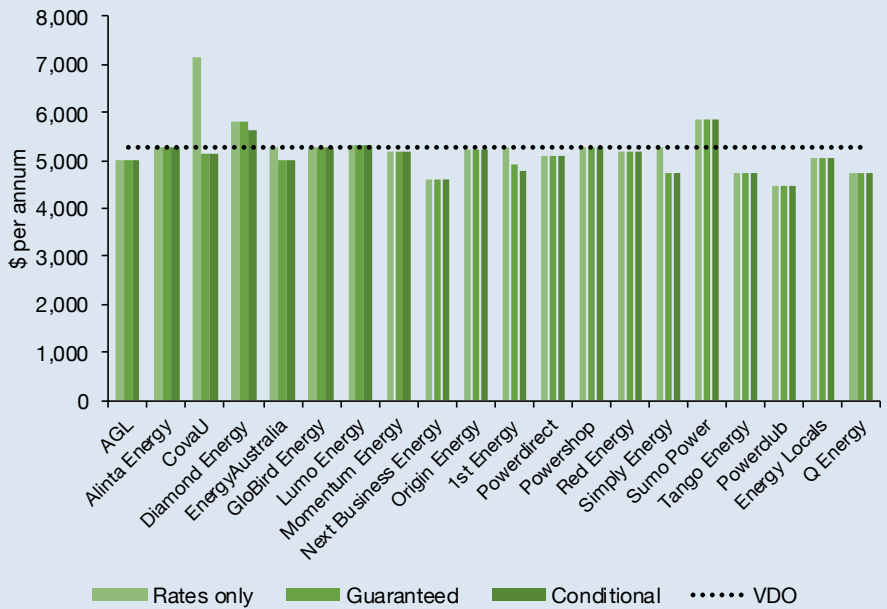


CHART 52 | Annual bills based on rates, guaranteed discounts and pay on time discounts as well as the VDO in Victoria's Jemena network. Annual bills based on market offers as of April 2021, 20,000 kWh per annum, single rate and GST inclusive



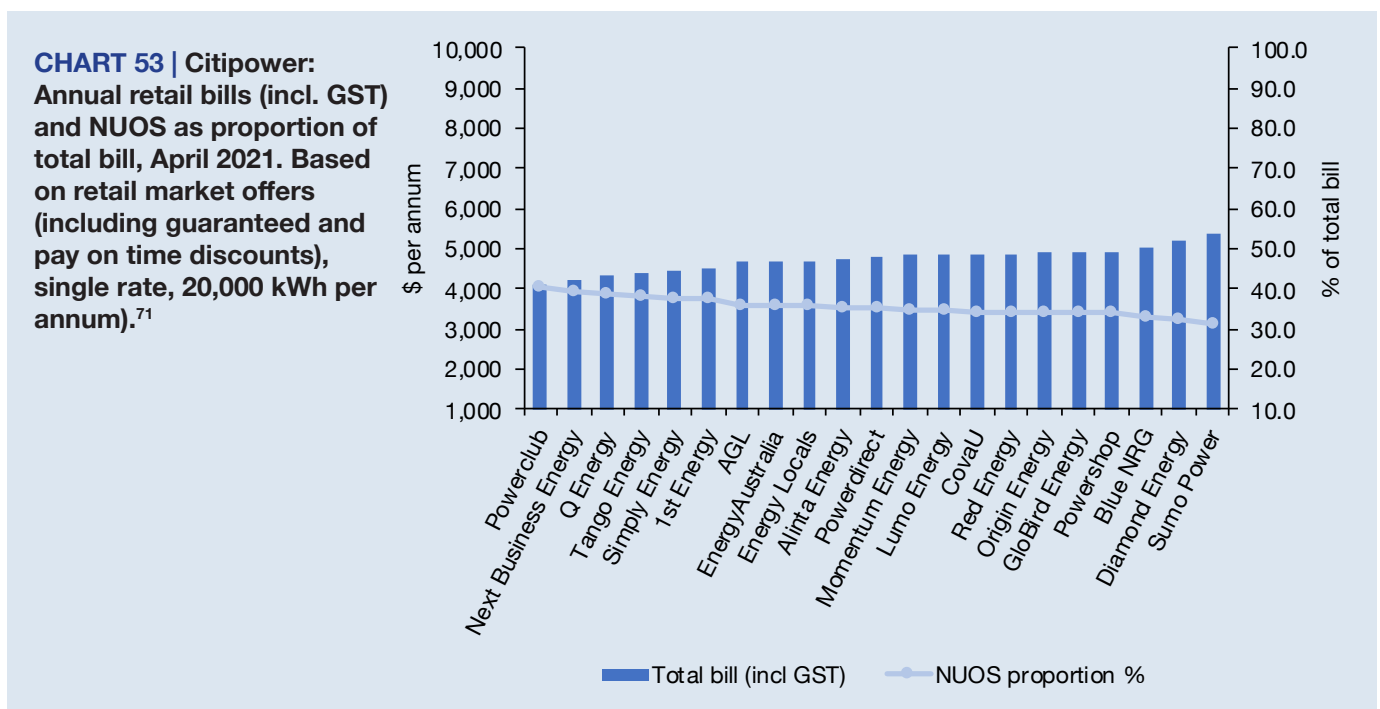
Network charges

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

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

Charts 53 - 57 show annual retail bills (columns) and NUOS as proportion of annual bill (line) for each of the five network areas.

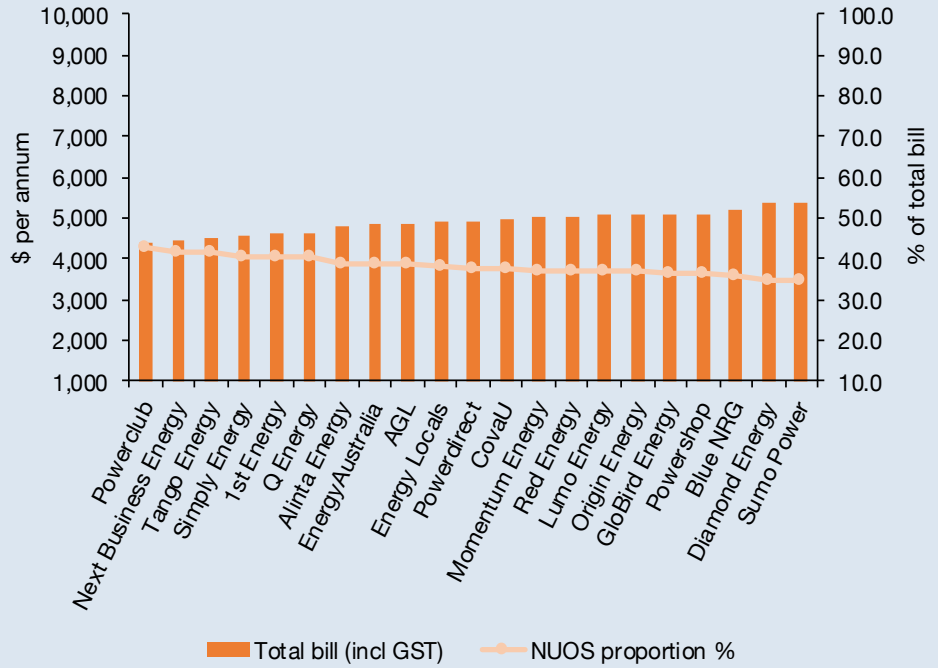
In the Citipower network the NUOS charges account for over 40% of Powerclub's annual bill while they make up 31% of Sumo Power's offer.



In the Powercor network the NUOS charges account for almost 43% of Powerclub's annual bill while they only make up 35% of Sumo Power's offer.

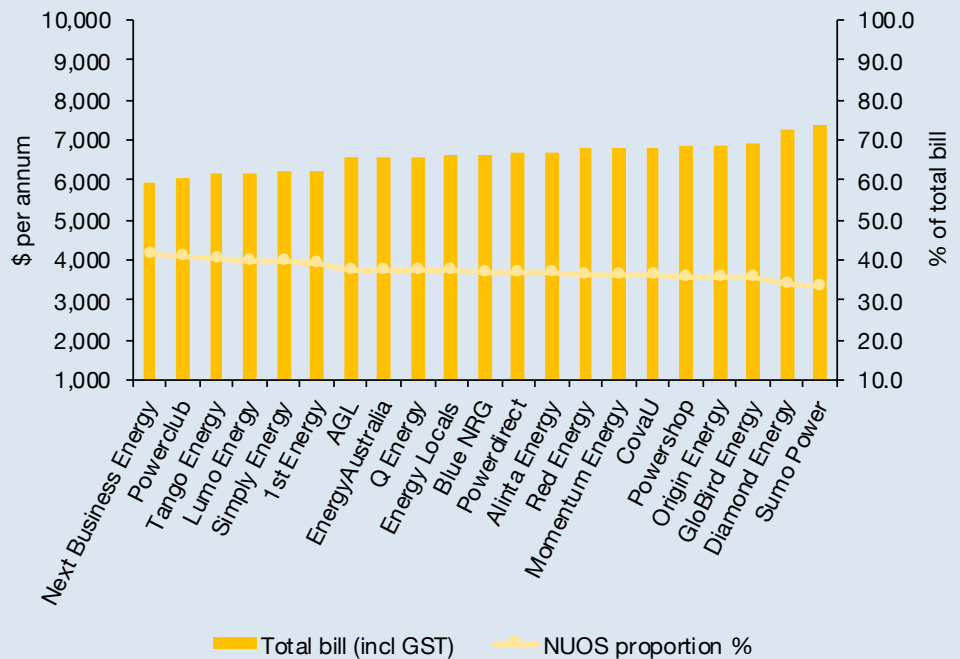
⁷¹ Based on market offer rates as of the 18th of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Citipower's charges (tariff C1G) for the 2021 calendar year. The NUOS also includes fixed charges.

CHART 54 | Powercor: Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum.⁷²



In the Ausnet Services network where the NUOS charges are higher, the NUOS charges account for almost 41.5% of Next Business Energy’s annual bill while they only make up 33% of Sumo Power’s offer.

CHART 55 | Ausnet Services: Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum⁷³

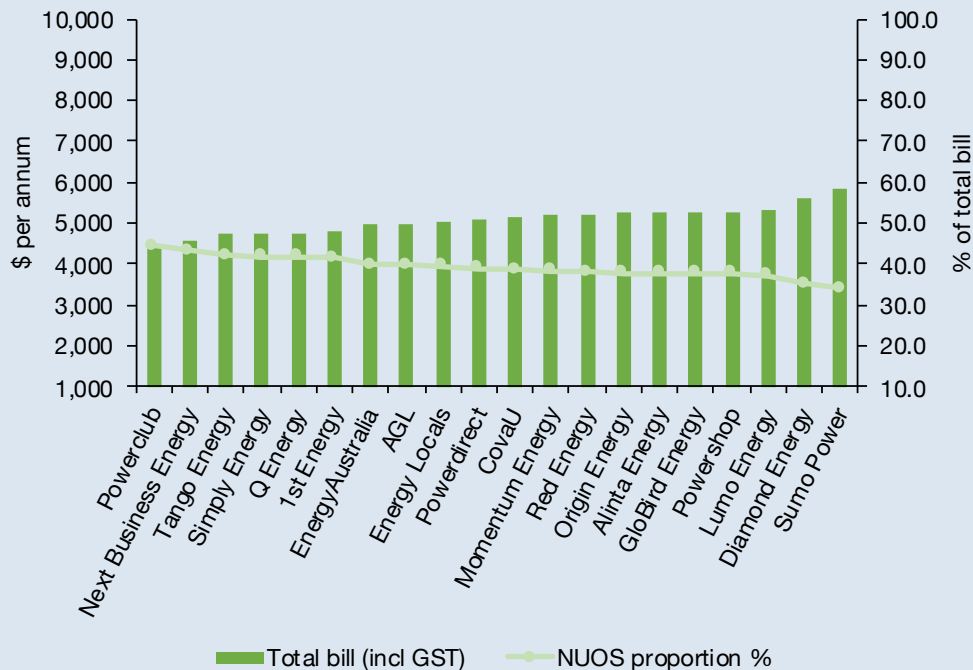


In the Jemena network the NUOS charges account for 44.5% of Powerclub’s annual bills while they only make up 34% of Sumo Power’s offer.

⁷² Based on market offer rates as of the 18th of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Powercor’s charges (tariff ND1) for the 2021 calendar year. The NUOS also includes fixed charges.

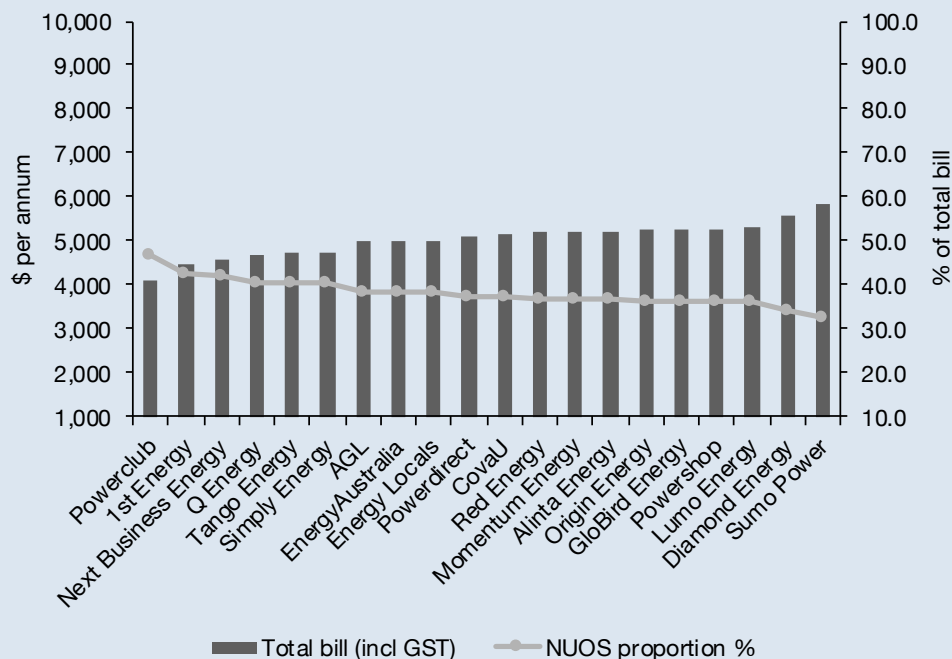
⁷³ Based on market offer rates as of the 18th of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Ausnet Services’ charges (tariff NEE 12) for the 2021 calendar year. The NUOS also includes fixed charges.

CHART 56 | Jemena:
Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum⁷⁴



In the United Energy network, the NUOS charges account for 46.5% of Powerclub’s offer while they only make up 33% of Sumo Power’s offer.

CHART 57 | United Energy: Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum⁷⁵



4.2.2 Victorian gas bills April 2021

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

To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat

⁷⁴ Based on market offer rates as of the 18th of April, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Jemena’s charges (tariff A200) for the 2021 calendar year. The NUOS also includes fixed charges.

⁷⁵ Based on market offer rates as of the 18th of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the United Energy’s charges (tariff LVM 1R) for the 2021 calendar year. The NUOS also includes fixed charges.

consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill).⁷⁶ Small businesses using gas for heating purposes are unlikely to have a flat consumption profile and may use more at peak rates (winter months) than what has been calculated here. Furthermore, as Victorian small businesses typically have a higher gas consumption compared to SMEs in other jurisdictions, a 100 GJ annual consumption is a relatively low gas consumption in Victoria.

The price-spread

The typical annual market offer bill for SMEs consuming 100 GJ per annum ranges from \$1,995 (including discounts) in the Ausnet Central pricing zones to \$2,275 in the AGN/Envestra pricing zones. The maximum price-spread is highest in the Ausnet Central pricing zones where the difference between the highest and lowest annual bill is approximately \$530 per annum. The price-spread is lowest in the Ausnet West pricing zone (around \$185). Compared to six months ago (October 2020), the maximum price-spread has decreased in six of the pricing zones and increased in two. The average maximum price-spread for all eight pricing zones has decreased by \$115.

Chart 58 shows the average gas market offer bill for the eight main pricing zone as well as the maximum price-spread for each area.

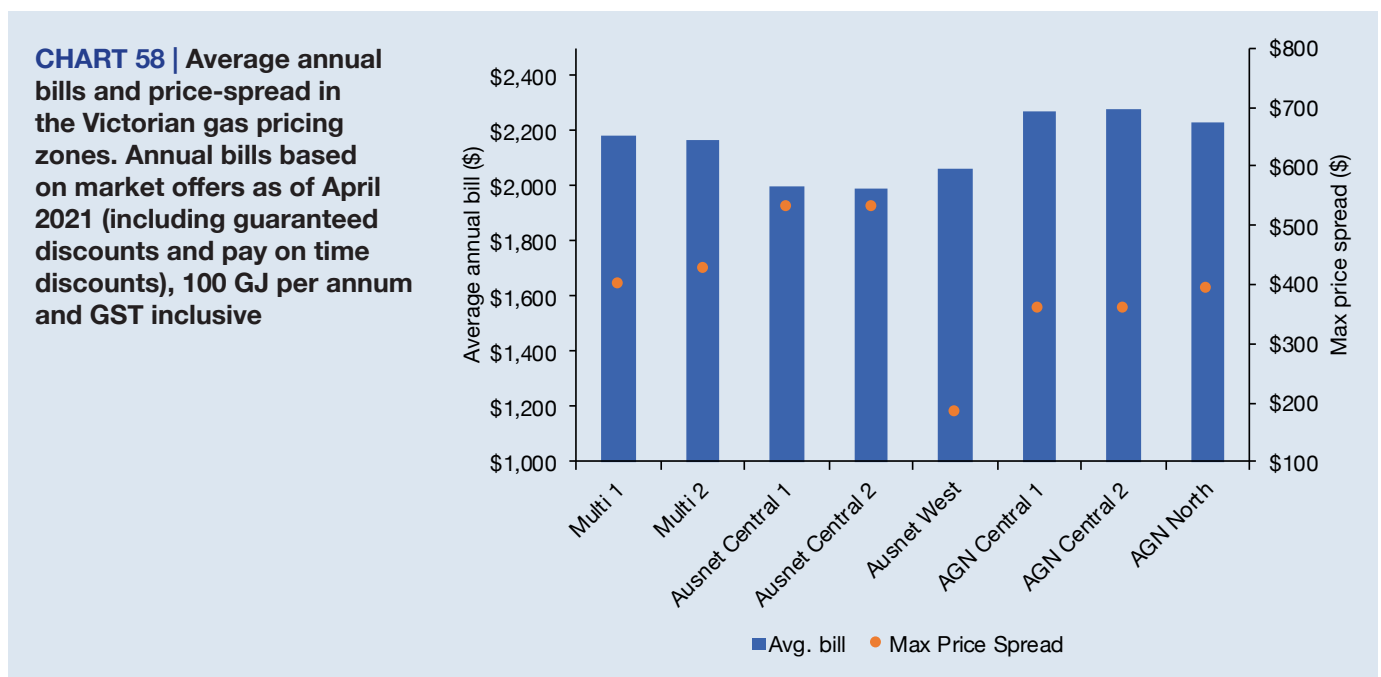
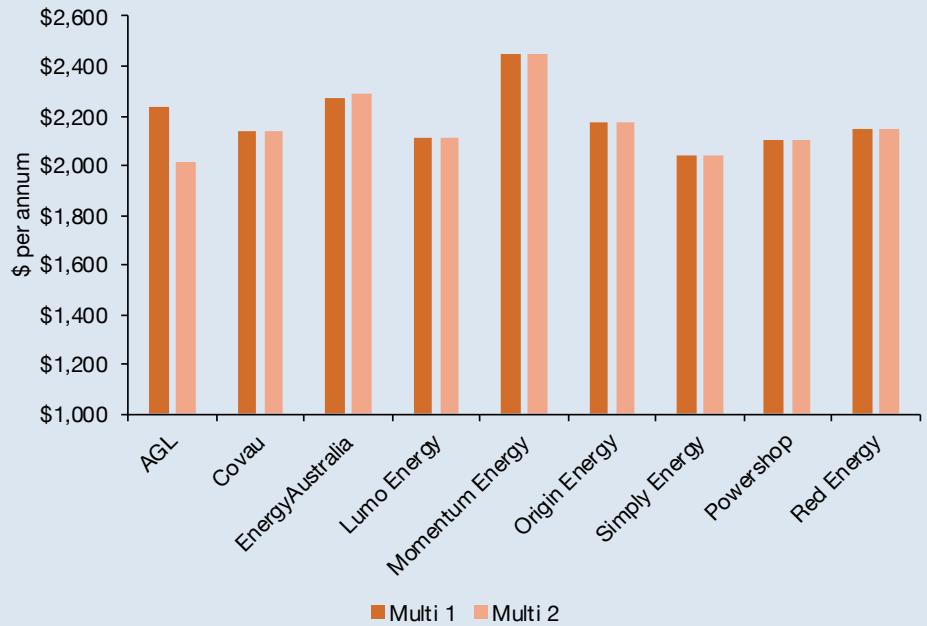


Chart 59 shows the retailers’ gas market offer bills in the two Multinet pricing zones.

⁷⁶ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

CHART 59 | Annual gas bills in Victoria's Multinet pricing zones. Annual bills based on market offers as of April 2021 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive



Figures 10 - 11 below rank the retail offers from lowest to highest annual gas bills in the two Multinet pricing zones.⁷⁷ The lowest annual retail bill in Multinet 1's pricing zone remained unchanged between October 2020 and April 2021, whereas it decreased by approximately \$25 in Multinet 2's pricing zone.

FIGURE 10 | Lowest to highest annual gas bills (incl GST) for market offers in the **Multinet 1 gas zone** (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum










	Simply Energy	\$2,044
	Powershop	\$2,100
	Lumo Energy	\$2,111
	Covau	\$2,136
	Red Energy	\$2,149
	Origin Energy	\$2,177
	AGL	\$2,239
	EnergyAustralia	\$2,267
	Momentum Energy	\$2,446

FIGURE 11 | Lowest to highest annual gas bills (incl GST) for market offers in the **Multinet 2 gas zone** (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum









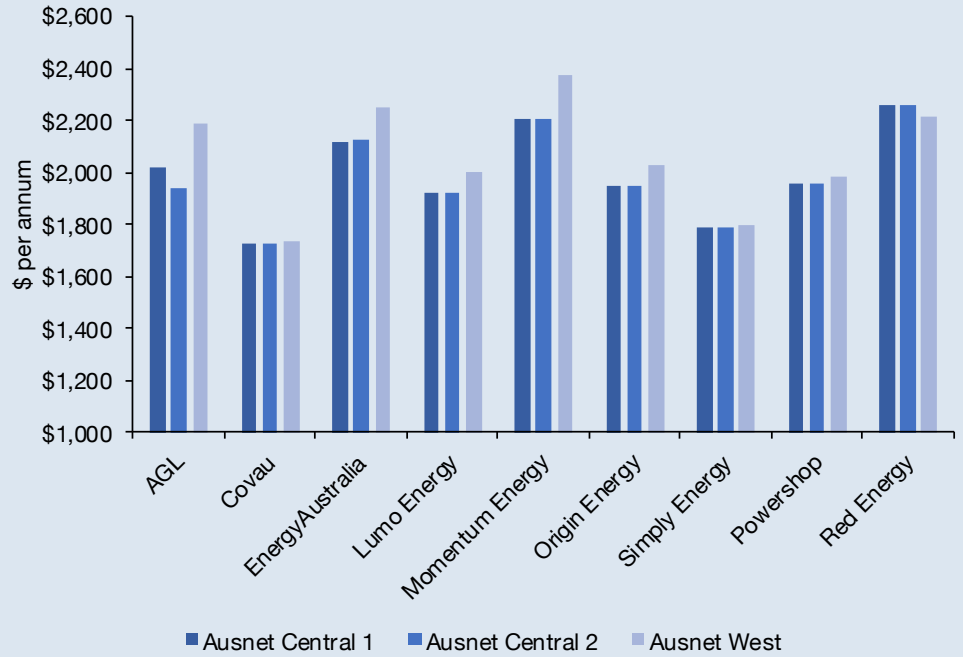
	AGL	\$2,017
	Simply Energy	\$2,044
	Powershop	\$2,100
	Lumo Energy	\$2,114
	Covau	\$2,136
	Red Energy	\$2,149
	Origin Energy	\$2,177
	EnergyAustralia	\$2,287
	Momentum Energy	\$2,446

Chart 60 shows the retailers' gas market offer bills in the three Ausnet Services pricing zones.

⁷⁷ These market offers were collected on the 18th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

CHART 60 | Annual gas bills in Victoria's Ausnet Services pricing zones. Annual bills based on market offers as of April 2021 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive



Figures 12 - 14 below rank the retail offers from lowest to highest annual gas bills in the three Ausnet Services pricing zones.⁷⁸ The lowest annual retail bills in Ausnet Services' pricing zones have decreased since October 2020. On average, across all three pricing zones, the best offers, as of April 2021, produce an annual bill that is \$60 less than the best offers six months ago.

FIGURE 12 | Lowest to highest annual gas bills (incl GST) for market offers in the Ausnet Services Central 1 gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	Covau	\$1,729
	Simply Energy	\$1,789
	Lumo Energy	\$1,923
	Origin Energy	\$1,952
	Powershop	\$1,960
	AGL	\$2,021
	EnergyAustralia	\$2,118
	Momentum Energy	\$2,207
	Red Energy	\$2,261

FIGURE 13 | Lowest to highest annual gas bills (incl GST) for market offers in the Ausnet Services Central 2 gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

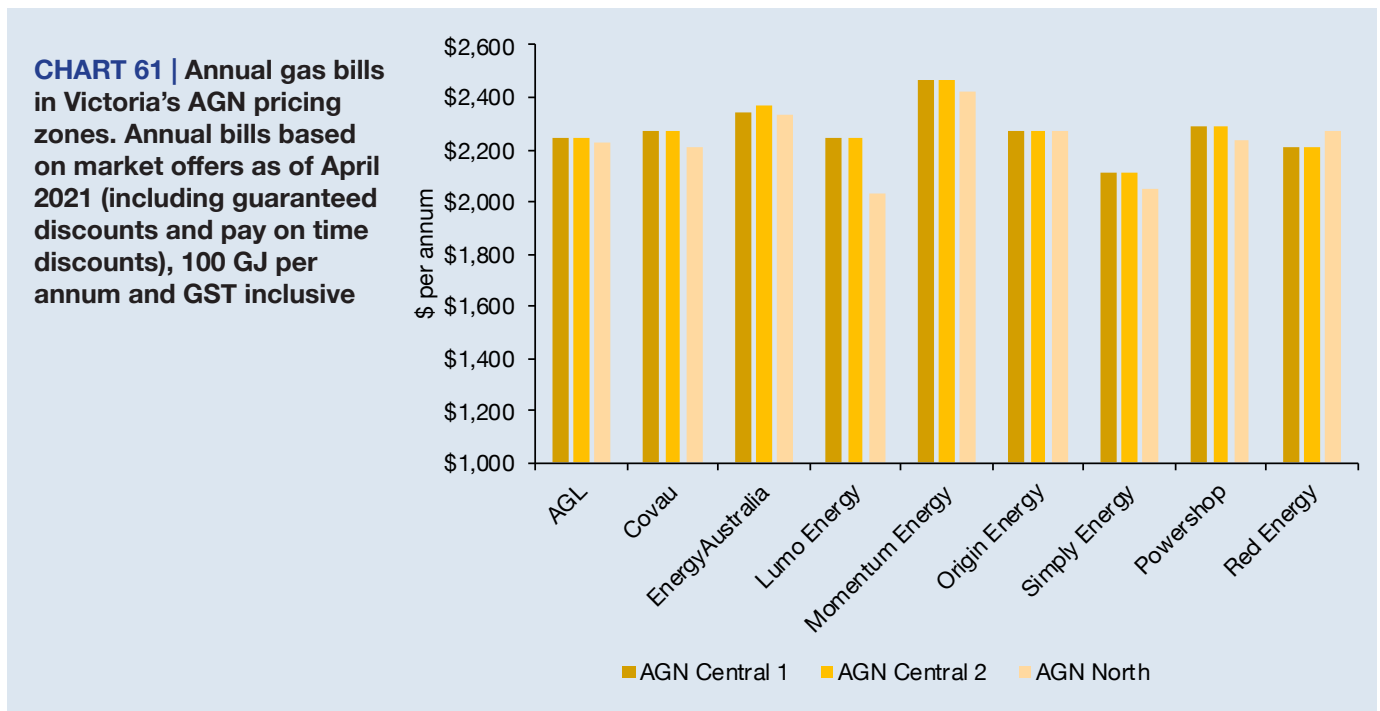
	Covau	\$1,729
	Simply Energy	\$1,789
	Lumo Energy	\$1,923
	AGL	\$1,941
	Origin Energy	\$1,952
	Powershop	\$1,960
	EnergyAustralia	\$2,128
	Momentum Energy	\$2,207
	Red Energy	\$2,261

FIGURE 14 | Lowest to highest annual gas bills (incl GST) for market offers in the Ausnet Services West gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	Covau	\$1,735
	Simply Energy	\$1,796
	Powershop	\$1,983
	Lumo Energy	\$2,001
	Origin Energy	\$2,032
	AGL	\$2,185
	Red Energy	\$2,219
	EnergyAustralia	\$2,247
	Momentum Energy	\$2,371

⁷⁸ These market offers were collected on the 18th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

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



Figures 15 - 17 below rank the retail offers from lowest to highest annual gas bills in the three AGN pricing zones.⁷⁹ The lowest annual retail bills in the AGN Central pricing zones have remained unchanged since October 2020, whereas it decreased by approximately \$20 in AGN North's pricing zone.

FIGURE 15 | Lowest to highest annual gas bills (incl GST) for market offers in the **AGN Central 1** gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Simply Energy	\$2,107
	Red Energy	\$2,212
	AGL	\$2,245
	Lumo Energy	\$2,247
	Covau	\$2,267
	Origin Energy	\$2,269
	Powershop	\$2,286
	EnergyAustralia	\$2,340
	Momentum Energy	\$2,468

FIGURE 16 | Lowest to highest annual gas bills (incl GST) for market offers in the **AGN Central 2** gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Simply Energy	\$2,107
	Red Energy	\$2,212
	AGL	\$2,245
	Lumo Energy	\$2,247
	Covau	\$2,267
	Origin Energy	\$2,269
	Powershop	\$2,286
	EnergyAustralia	\$2,372
	Momentum Energy	\$2,468

FIGURE 17 | Lowest to highest annual gas bills (incl GST) for market offers in the **AGN North** gas zone (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum.

	Lumo Energy	\$2,029
	Simply Energy	\$2,051
	Covau	\$2,207
	AGL	\$2,227
	Powershop	\$2,236
	Origin Energy	\$2,269
	Red Energy	\$2,269
	EnergyAustralia	\$2,337
	Momentum Energy	\$2,424

⁷⁹ These market offers were collected on the 18th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

Additional discounts

Energy Australia, CovaU and Simply Energy offer guaranteed discounts. The remaining retailers (AGL, Origin Energy, Lumo Energy, Momentum, Powershop and Red Energy) do not offer any additional discounts.

Charts 62 - 69 show annual bills based on their rates only and inclusive of guaranteed discounts in the each of the eight gas pricing zones.

The charts show that Energy Australia’s guaranteed discounts are over \$600 per annum for customers with this consumption level across all pricing zones. CovaU and Simply Energy also offer significant discounts. Energy Australia is, however, the retailer with the highest base rates in all of the gas zones.

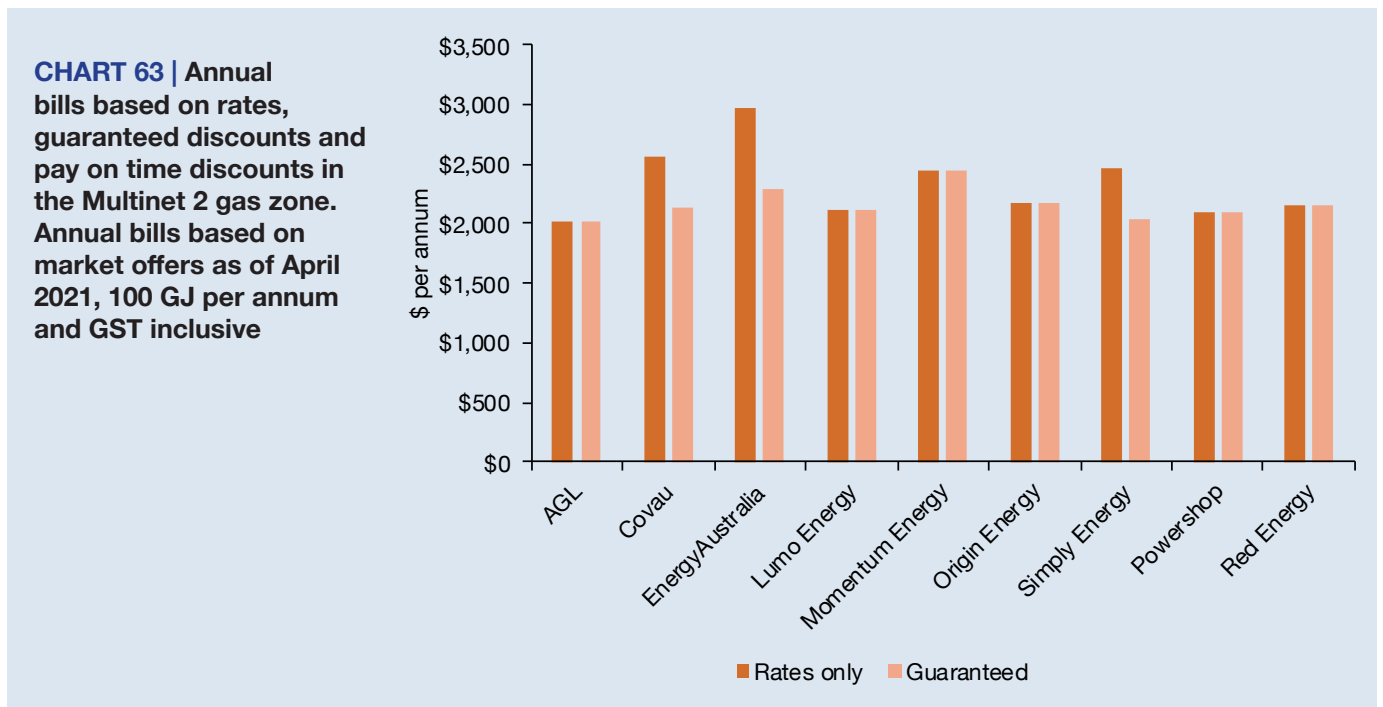
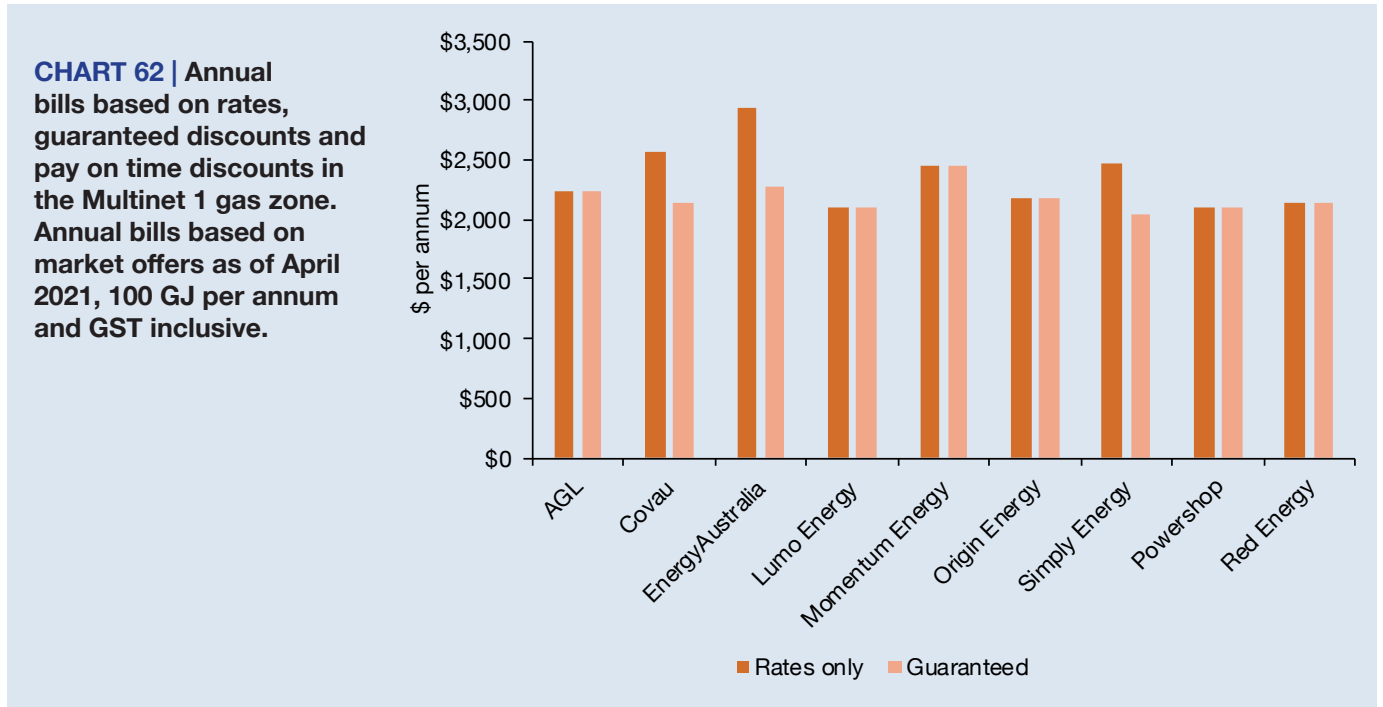


CHART 64 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services Central 1 gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

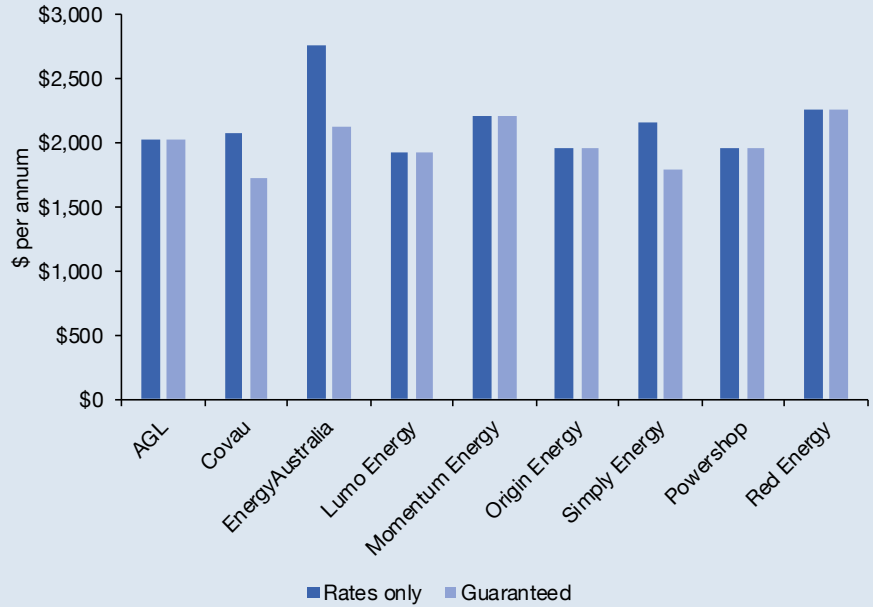


CHART 65 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services Central 2 gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

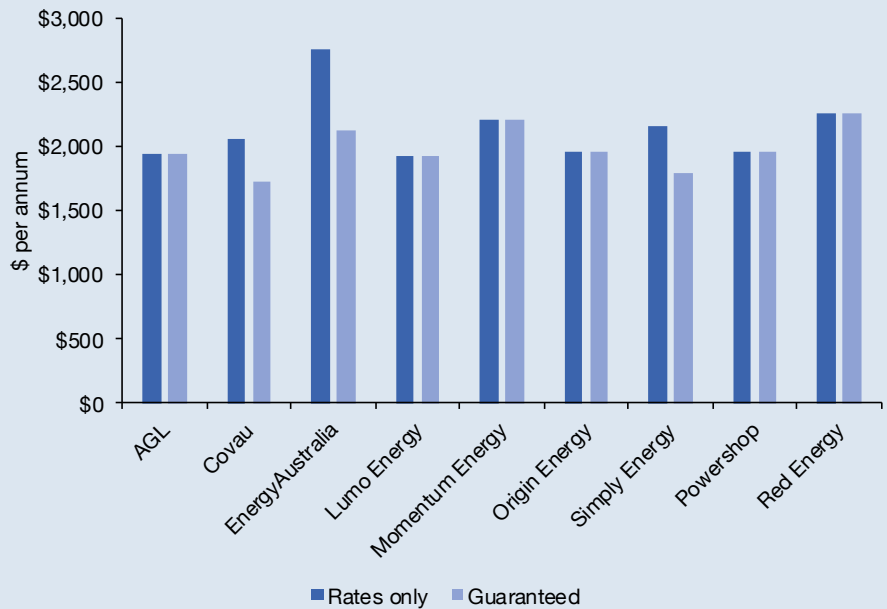


CHART 66 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the Ausnet Services West gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

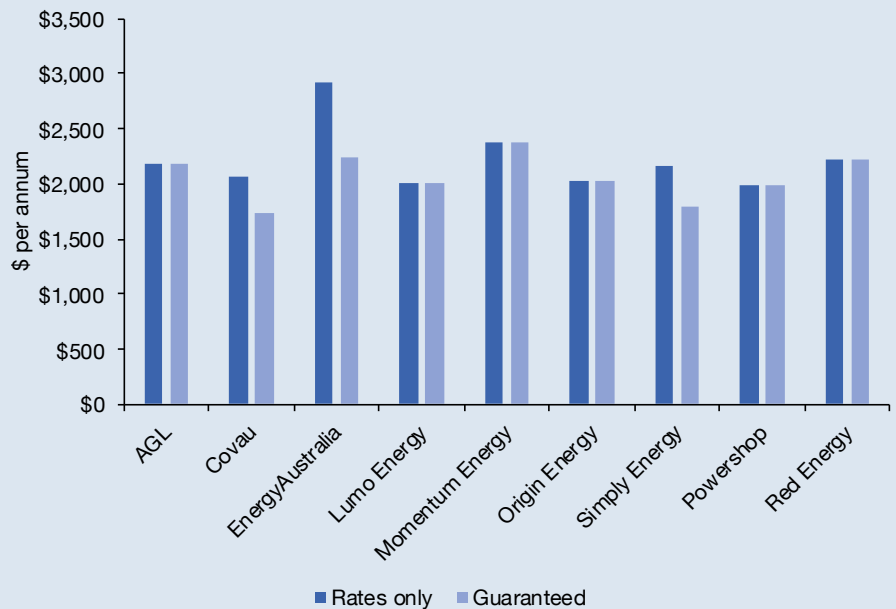


CHART 67 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN Central 1 gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

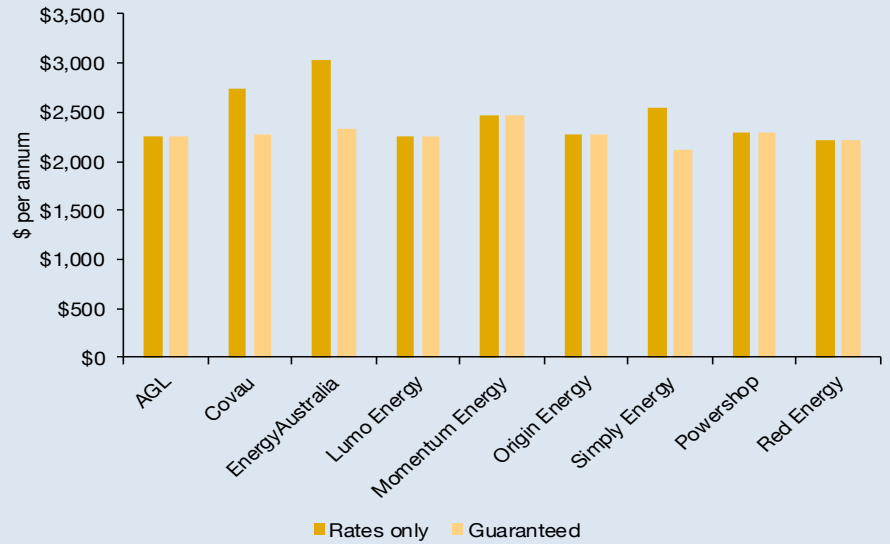


CHART 68 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN Central 2 gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

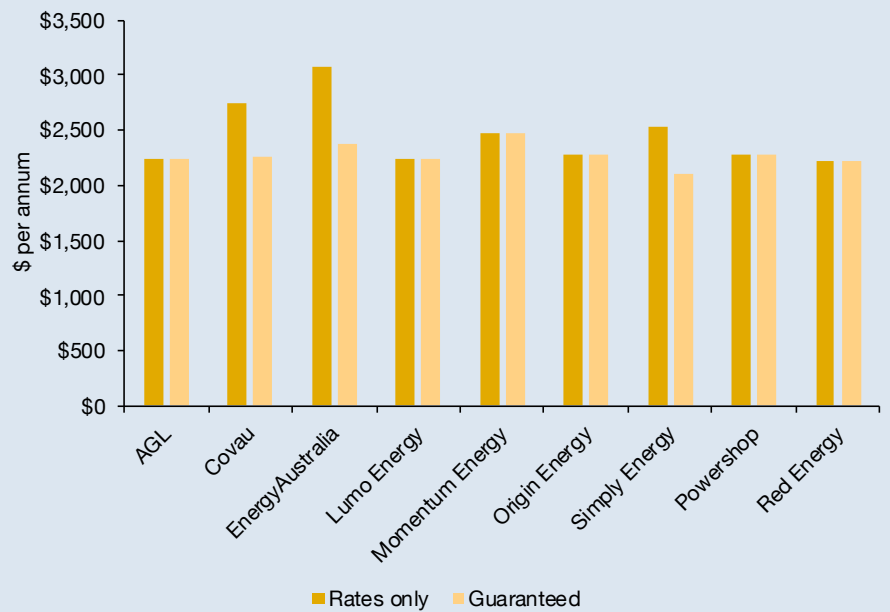
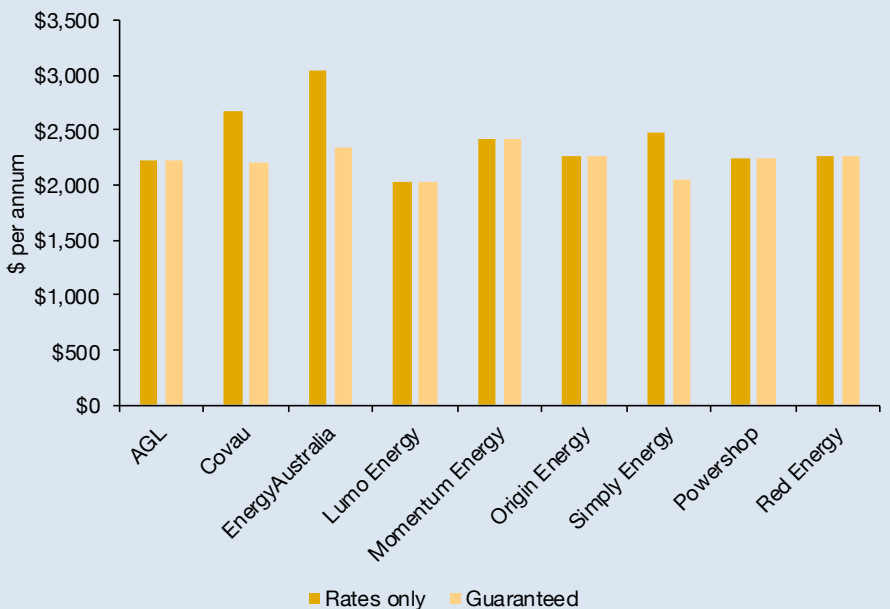


CHART 69 | Annual bills based on rates, guaranteed discounts and pay on time discounts in the AGN North gas zone. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive

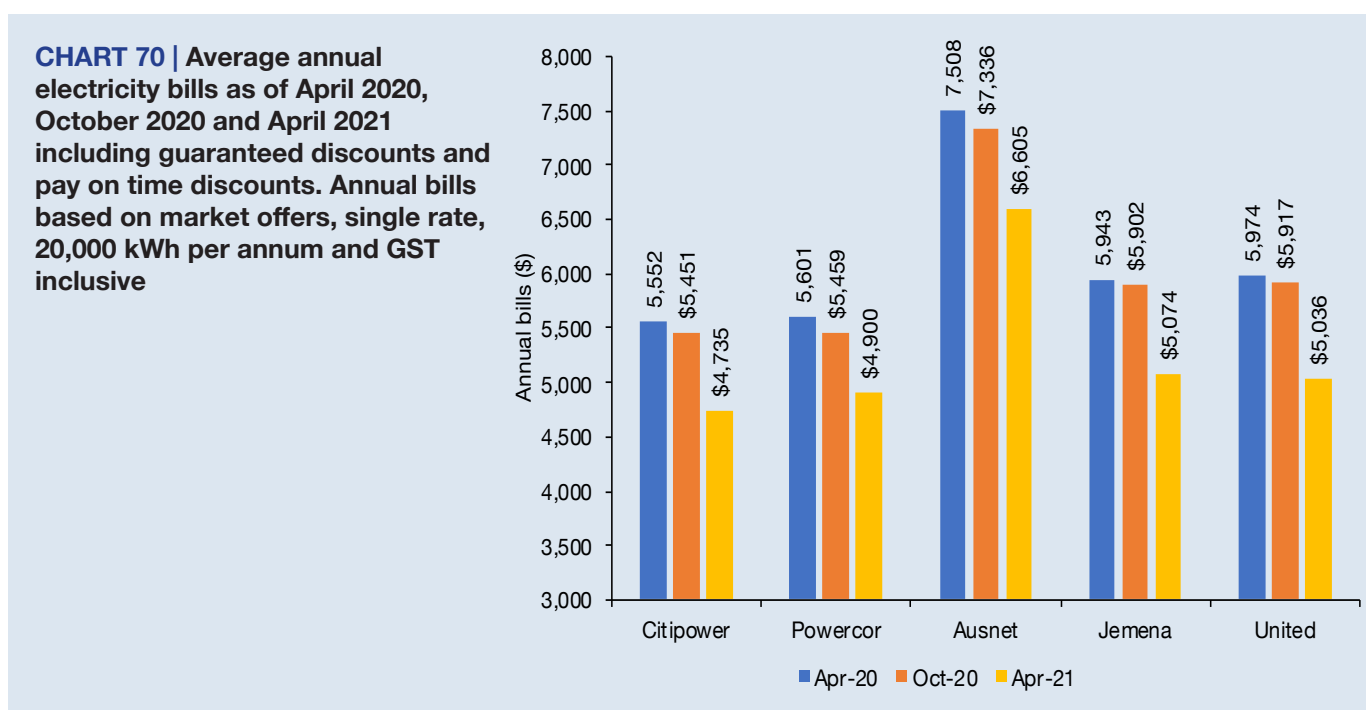


4.2.3 Changes in energy bills in Victoria

The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2021.

In Victoria, new network tariffs took effect in January 2021 meaning that the electricity retail prices have been affected by an underlying price reset in this six-month period. Most of the retailers have thus changed their offers (rates, discounts or both).

From October 2020 to April 2021, average retail electricity bills for SMEs consuming 20,000 kWh per annum (single rate) decreased by just under 10% in the Powercor and Ausnet network areas and by approximately 12.5% in Citipower. In the Jemena network the average decrease was 13.5% and the greatest average decrease occurred in the United Energy network at 14.5%. Chart 70 below shows average annual bills as of April 2020, October 2020 and April 2021.



In terms of individual retailers, all retailers except Sumo Power and Blue NRG, have offers that produce lower bills in April 2021 compared to six months ago (October 2020) in all network areas. Compared to one year ago (April 2020) all retailers have offers that produce lower bills.

Charts 71 to 75 show retail bills as of April 2020, October 2020 and April 2021 for each network area.

CHART 71 | Electricity bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 in Citipower's network area. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive

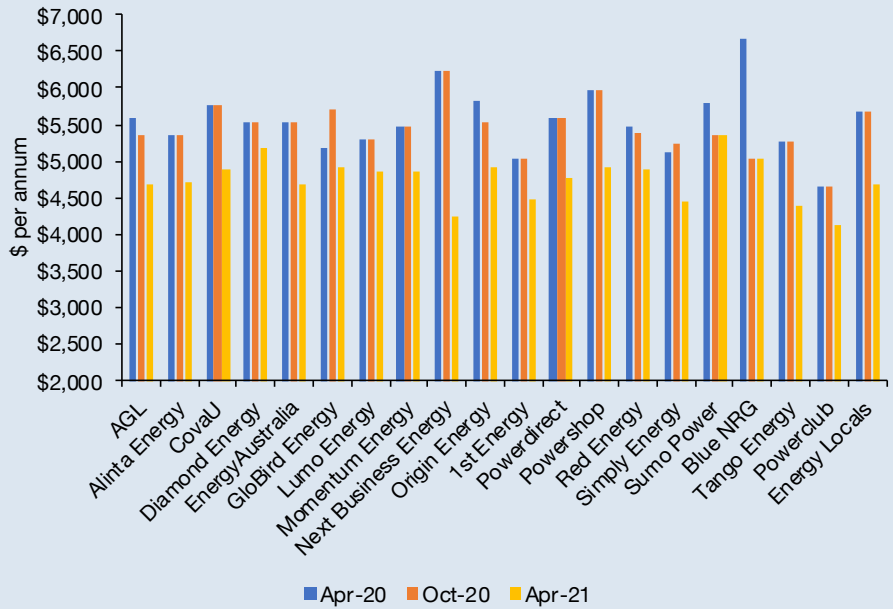


CHART 72 | Electricity bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 in Powercor's network area. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive

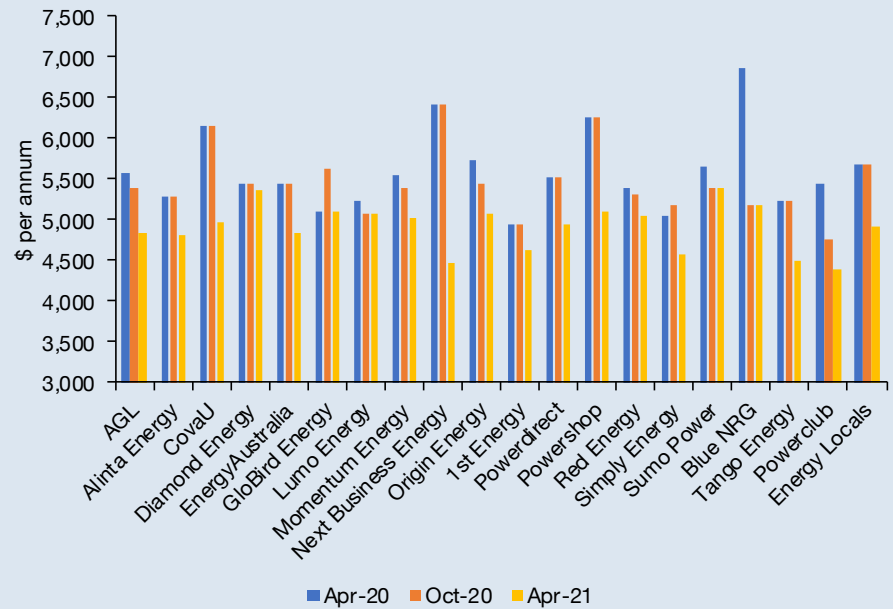


CHART 73 | Electricity bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 in Ausnet Services' network area. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive

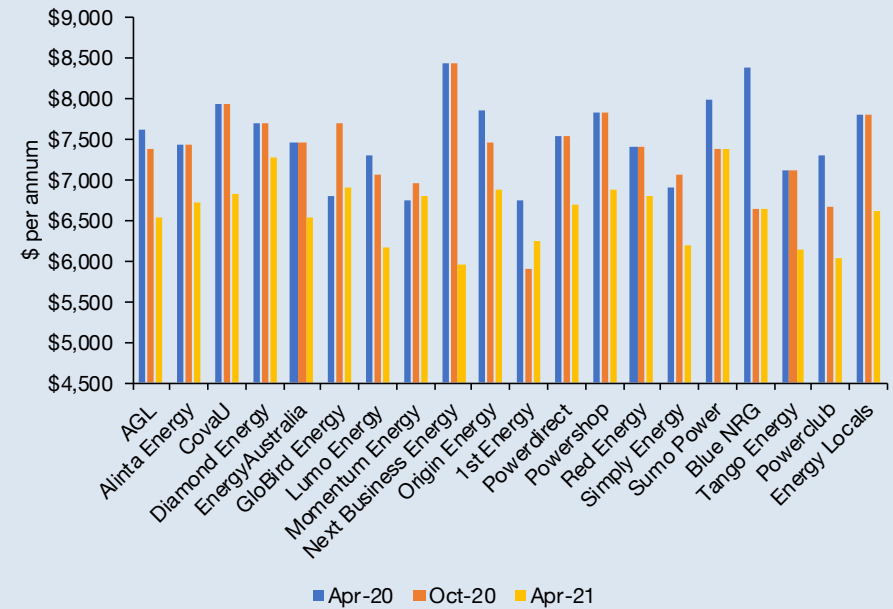


CHART 74 | Electricity bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 in Jemena’s network area. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive

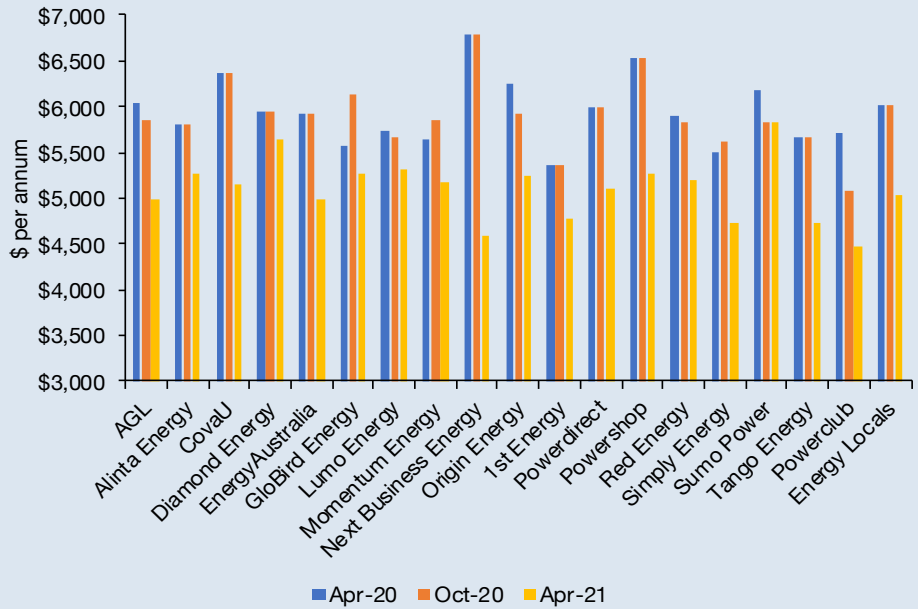
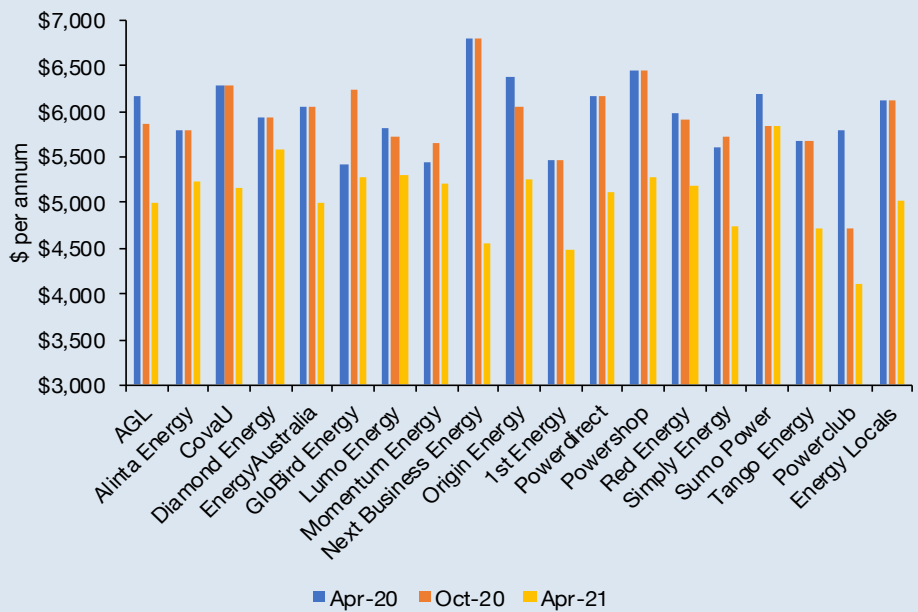


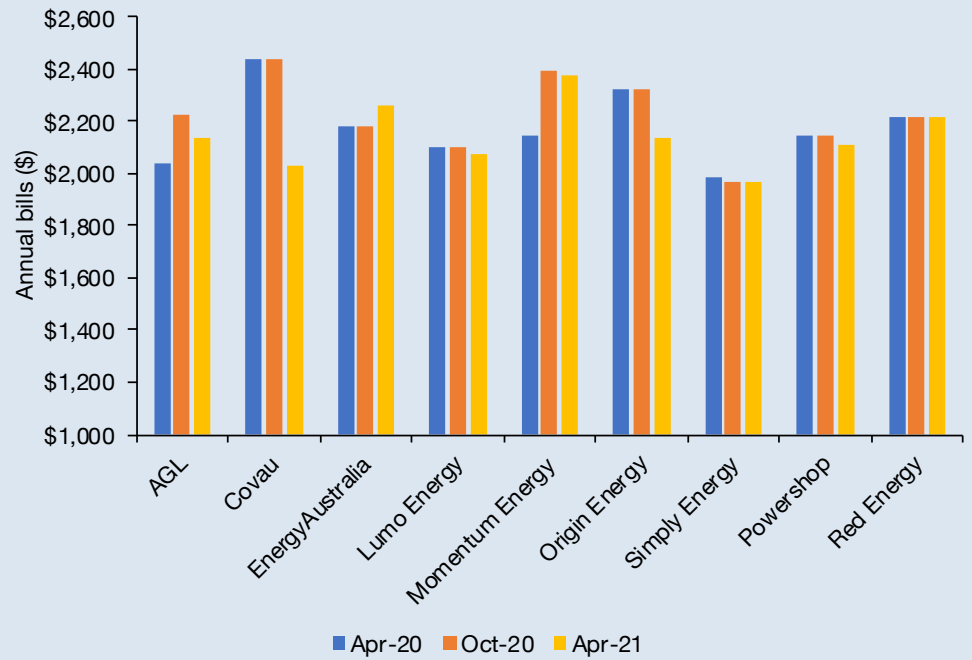
CHART 75 | Electricity bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 in United Energy’s network area. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive



On average, across all gas pricing zones, annual gas bills for businesses using 100 GJ per annum decreased by 3% between October 2020 and April 2021.⁸⁰ It shows that Momentum Energy had the greatest increase over the last 6 months. Chart 76 shows retailers’ average annual gas bills (across all gas zones) as of April 2020, October 2020 and April 2021.

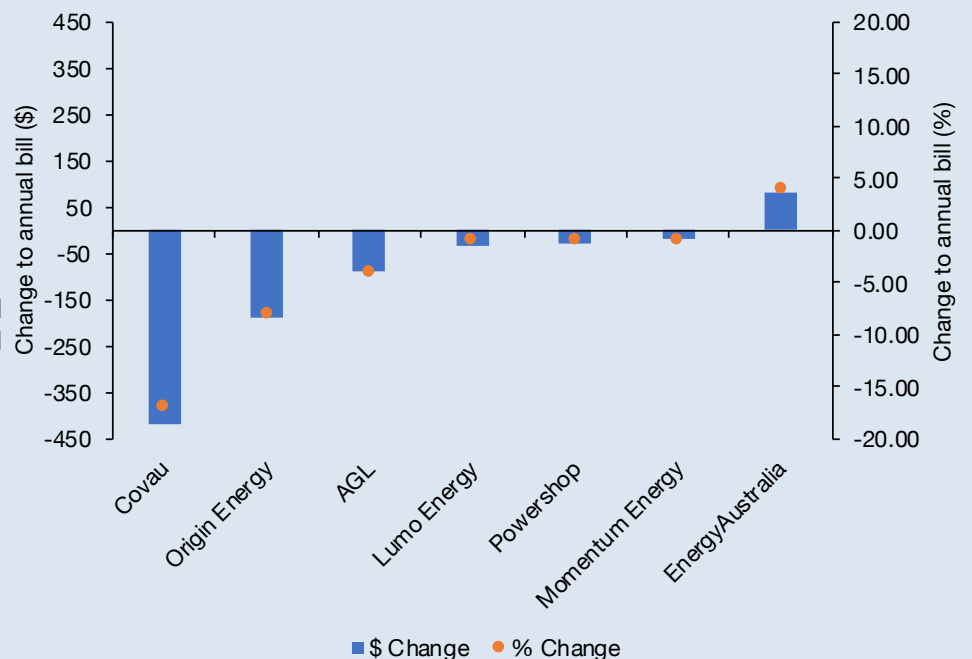
⁸⁰ The gas zones included in this analysis are: Multinet 1 and 2, AGN Central 1 and 2, AGN North, Ausnet Services Central 1 and 2, and Ausnet Services West.

CHART 76 | Average gas bills including guaranteed discounts and pay on time discounts, from April 2020 to April 2021 across eight gas zones. Annual bills based on market offers as of April 2020, October 2020 and April 2021, 100 GJ per annum and GST inclusive



Seven of the retailers have changed their offers over the last six months (since October 2020). Energy Australia’s bills have increased while AGL, Covau, Lumo Energy, Momentum, Origin Energy and Powershop’s bills have decreased. Simply Energy and Red Energy’s bills have remained unchanged. Chart 77 below shows retailers’ changes to their average annual gas bill during this period.⁸¹

CHART 77 | Bill change: Comparison of October 2020 and April 2021 average annual gas bills including guaranteed discounts and pay on time discounts in eight gas zones. Annual bills based on market offers as of October 2020 and April 2021, 100 GJ per annum and GST inclusive



4.2.4 Impact of the VDO

Since the introduction of the VDO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously. Furthermore, as shown in section 4.2.3 above, the average market offer bill has decreased in all five network areas over the last 12 months.

Businesses previously on a standing offer with one of the ‘big 3’ retailers (AGL, Energy Australia and Origin Energy) will have experienced significant bill reductions since the introduction of the VDO on 1 July 2019.

⁸¹ Only retailers that have changed their offers during this period are included in this chart.

Charts 78 – 82 below compare AGL, Energy Australia and Origin Energy’s standing offers prior to the VDO taking effect to the VDO as of October 2019, April 2020, October 2020 and April 2021. They show that the initial bill reduction (October 2019), for businesses using 20,000 kWh per annum, was between \$1,320 and \$2,995 (depending on the network and retailer) but increases to the VDO in January 2020 reduced the overall drop to \$900 and \$2,530. In January 2021 the VDO decreased by 14% (on average) and bills are now between \$1,790 and \$3,290 less than they were prior to the VDO taking effect. Energy Australia’s bill in the United Energy network has reduced the most (by around \$3,290) while Origin Energy’s bill reduction in the Citipower network, where it is the incumbent retailer, is more moderate (approximately \$1,790).

CHART 78 | The VDO compared to the ‘big 3’ retailers’ standing offers in the Citipower network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive

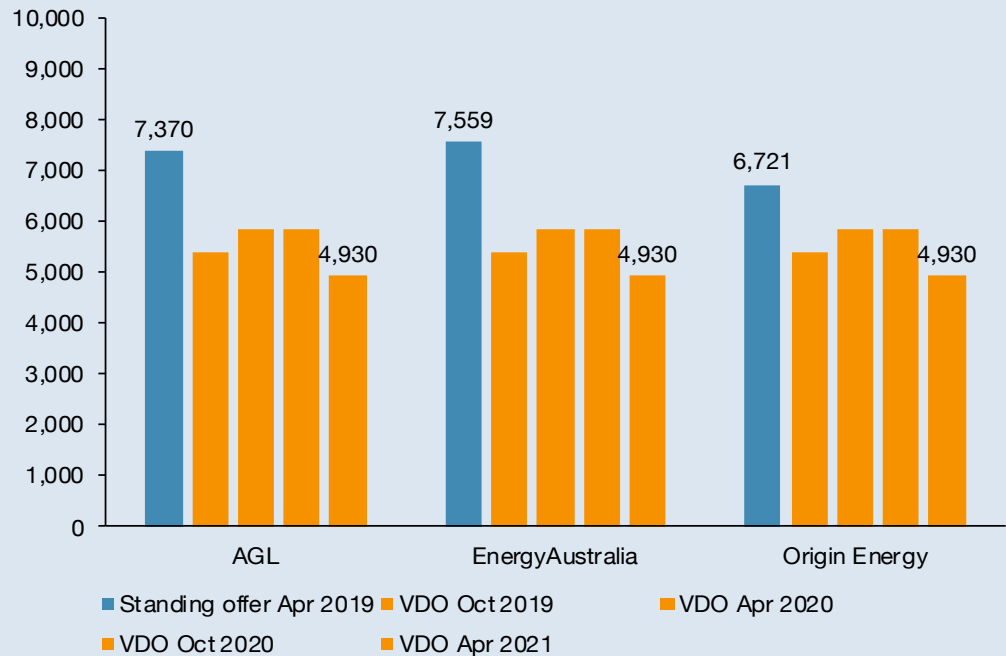


CHART 79 | The VDO compared to the ‘big 3’ retailers’ standing offers in the Powercor network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive

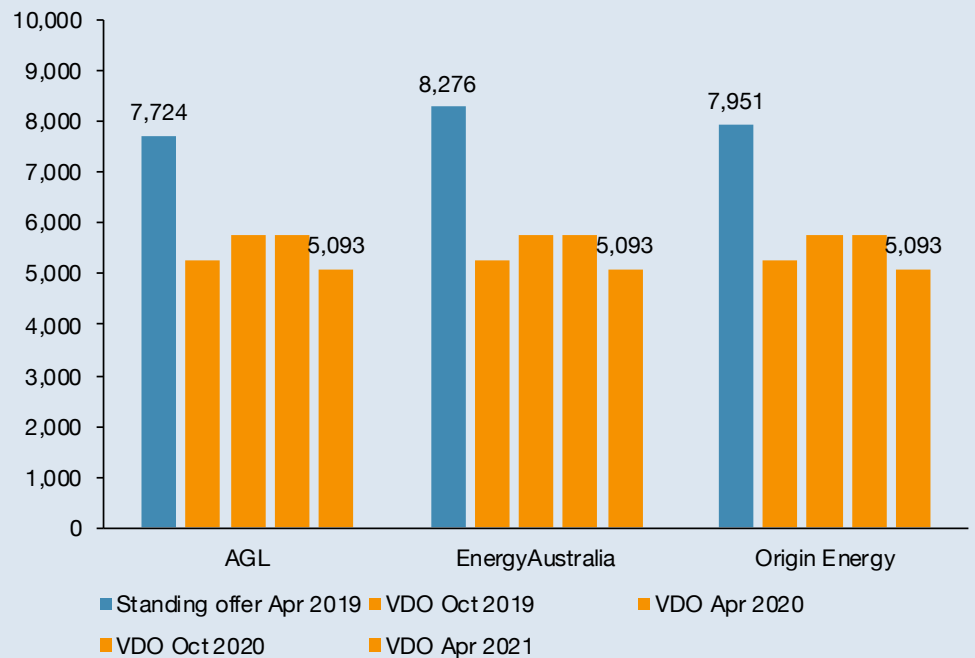


CHART 80 | The VDO compared to the 'big 3' retailers' standing offers in the Ausnet Services network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.

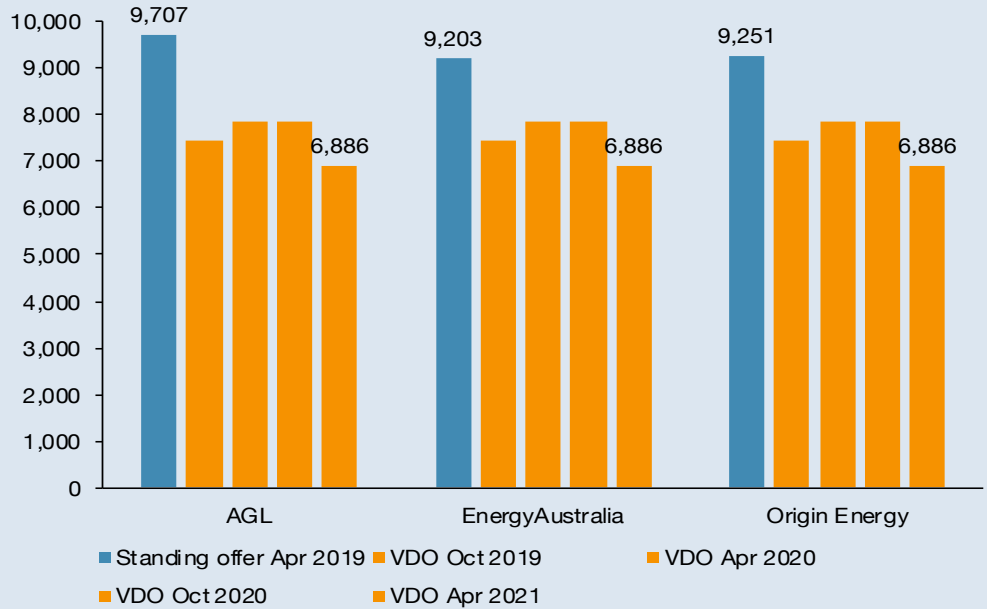


CHART 81 | The VDO compared to the 'big 3' retailers' standing offers in the Jemena network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.

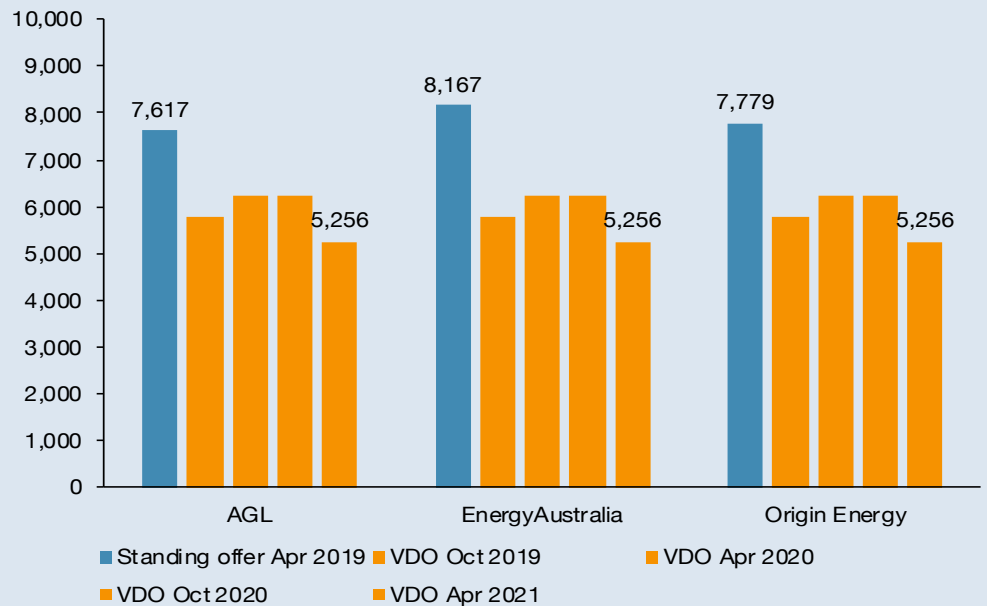
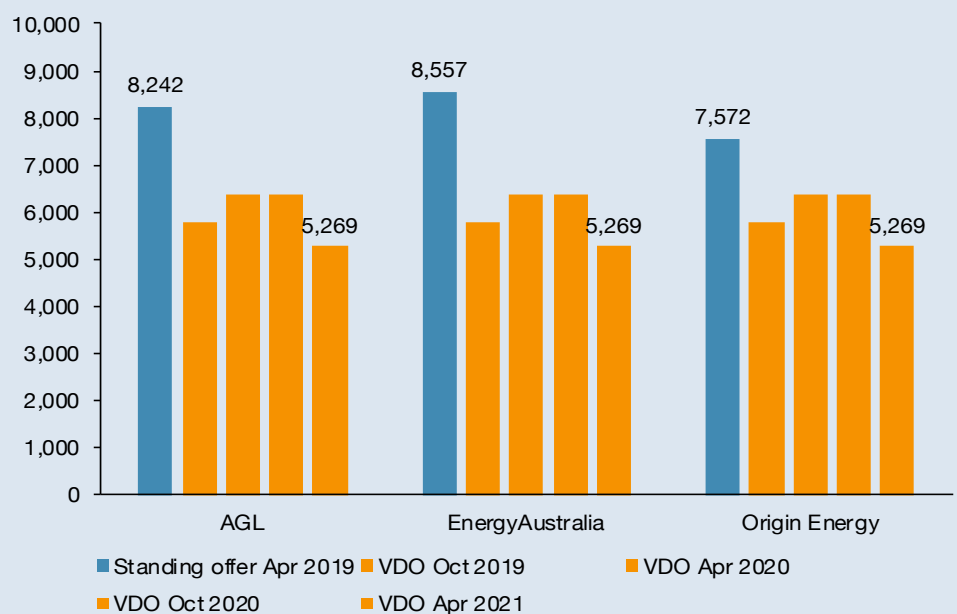


CHART 82 | The VDO compared to the 'big 3' retailers' standing offers in the United Energy network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



4.3 Queensland

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

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

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

Electricity network	Area
Energex	South East Queensland
Ergon Energy	Regional and Northern Queensland
Gas zones	Area
Allgas – Brisbane South	South Brisbane, Gold Coast, Toowoomba and Oakey
AGN – Brisbane North	North Brisbane and Ipswich
AGN - Northern	Rockhampton and Gladstone
AGN – Wide Bay	Bundaberg, Maryborough and Hervey Bay

4.3.1 Queensland electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO⁸² shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Energex network is 16,678 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The price-spread

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$4,750.⁸³ Chart 83 shows annual bills for twenty-six retailers in South East Queensland (Energex network) and that the maximum price-spread is approximately \$1,775 per annum. Compared to six months ago (October 2020), the maximum price-spread has decreased by \$280.

⁸² Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

⁸³ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

CHART 83 | The price-spread in the South East Queensland's Energen distribution network. Annual bills based on market offers as of April 2021 (including guaranteed discounts and pay on time discounts), 20,000 kWh per annum, single rate and GST inclusive

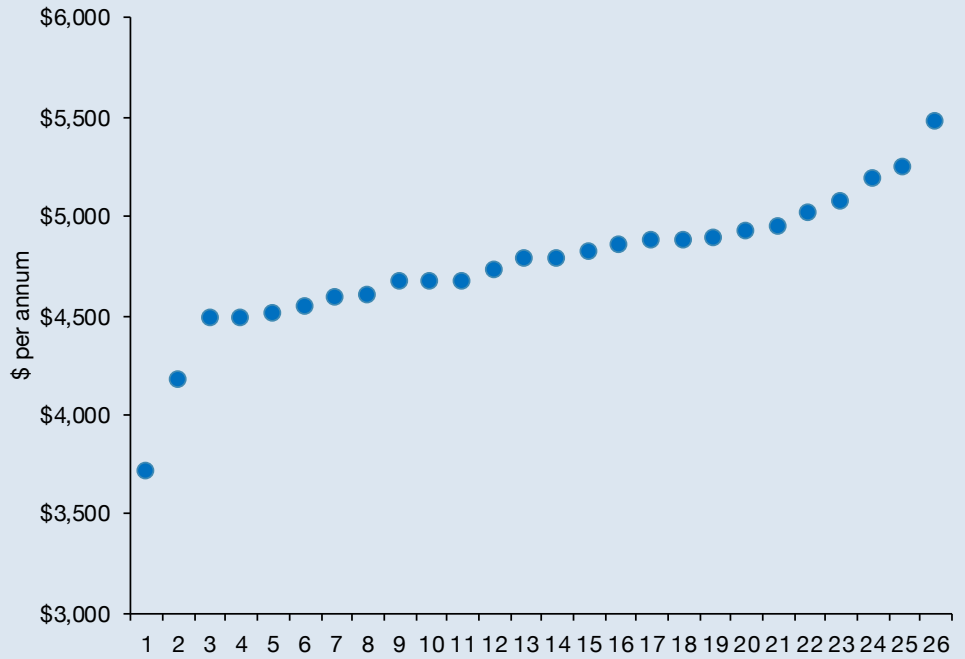




























Figure 18 below ranks the retail offers from lowest to highest annual electricity bills.⁸⁴ The lowest annual retail bill in the Energen network area has remained unchanged since October 2020.

FIGURE 18 | Lowest to highest annual electricity bills (incl GST) for market offers in Queensland's Energen network (April 2021)

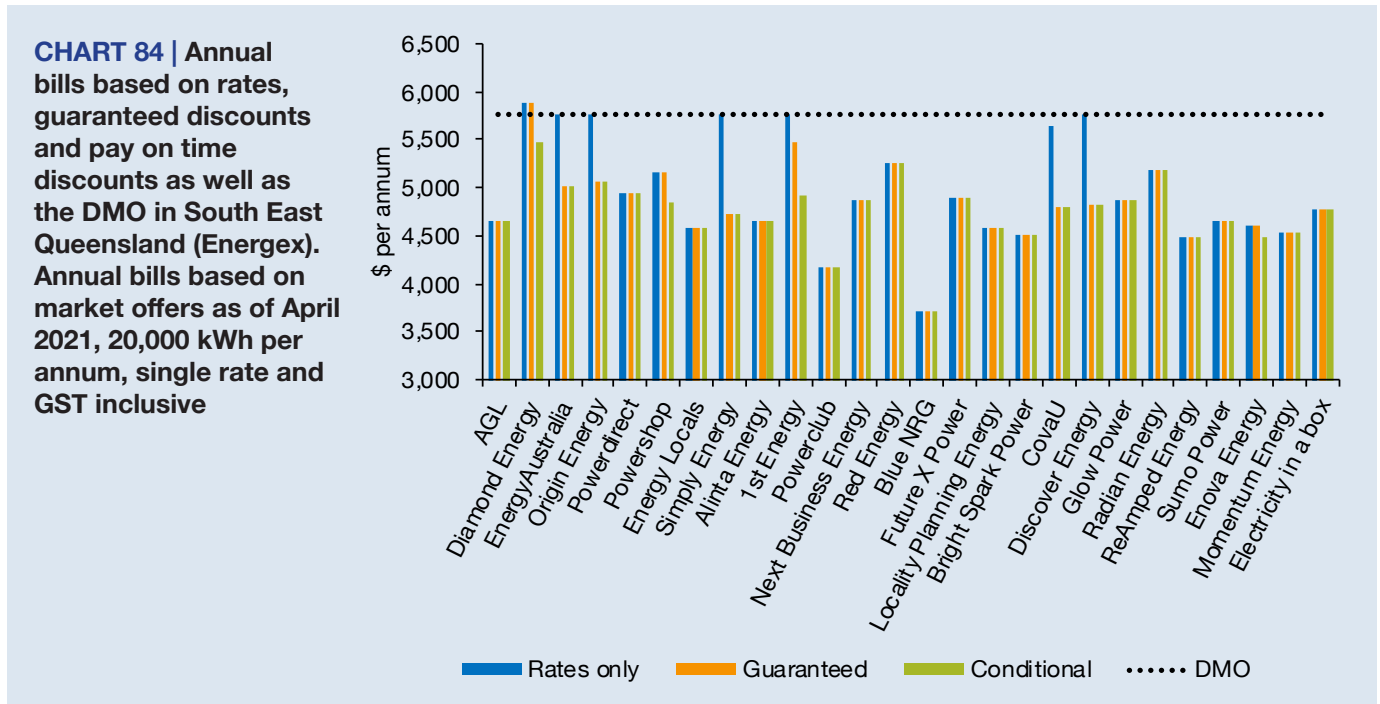
Including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

 BlueNRG	\$3,706	 Discover Energy	\$4,814
 Powerclub	\$4,167	 Powershop	\$4,850
 ReAmped Energy	\$4,483	 Next Business Energy	\$4,880
 Enova Energy	\$4,488	 Glow Power	\$4,881
 Bright Spark Power	\$4,508	 Future X Power	\$4,884
 Momentum Energy	\$4,539	 1st Energy	\$4,918
 Locality Planning Energy	\$4,582	 Powerdirect	\$4,949
 Energy Locals	\$4,593	 EnergyAustralia	\$5,010
 Alinta Energy	\$4,662	 Origin Energy	\$5,071
 AGL	\$4,663	 Radian Energy	\$5,184
 Sumo Power	\$4,664	 Red Energy	\$5,244
 Simply Energy	\$4,722	 Diamond Energy	\$5,478
 Electricity in a box	\$4,777		
 CovaU	\$4,788		

⁸⁴ These market offers were collected on the 7th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

Additional discounts

Nine out of the twenty-six retailers operating in South East Queensland offer additional discounts. Energy Australia, Origin, Simply Energy, 1st Energy, CovaU and Discover Energy offer guaranteed discounts while the remaining three retailers (Diamond Energy, Powershop and Enova) offer discounts conditional upon bills being paid on time.⁸⁵ The conditional pay on time discount can be worth up to \$545 per annum for customers using 20,000 kWh/annum. Chart 84 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discount. The chart also compares the market offers to the DMO and it shows that all of the market offers produce bills that are lower than the DMO. We note, however, that Diamond Energy’s offer is only lower than the DMO if the conditional pay on time discount is obtained.



Network charges

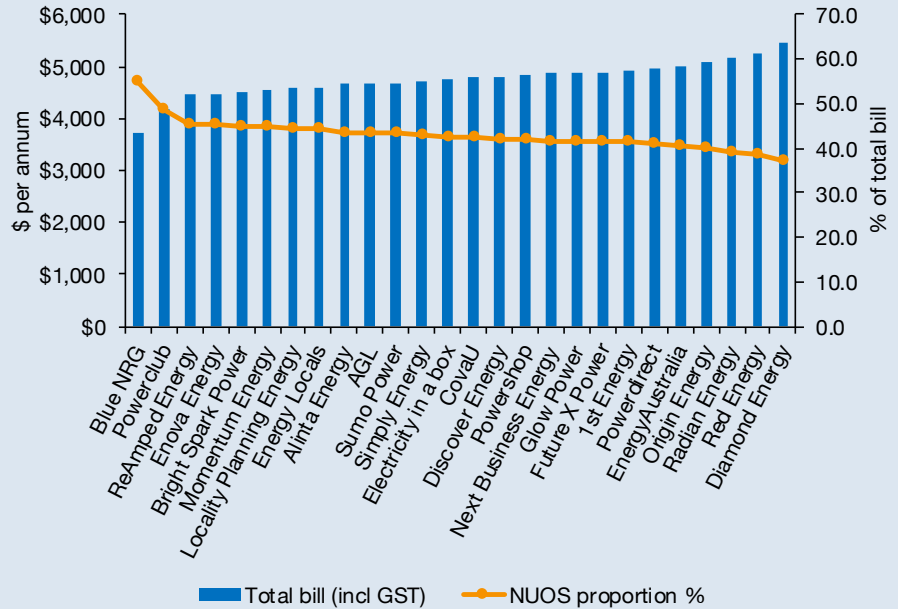
The South East Queensland electricity network, Energex, introduces new Network Use of System (NUOS) charges as of 1 July every year. These NUOS charges are approved by the Australian Energy Regulator (AER) and comprise Transmission Use of System (TUOS) and Distribution Use of System (DUOS) as well as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

The chart presented in this section shows that the NUOS proportion of bills varies significantly between retail offers. The NUOS proportion of the bill for BlueNRG is 54.8% while the NUOS comprises 37.1% of the total bill for Diamond Energy’s customers.

Charts 85 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

⁸⁵ Note that Powershop’s conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing “specials”. Also note that 1st Energy’s 1st Saver Plus offer has both a guaranteed and a conditional discount.

CHART 85 | South East Queensland (Energex): Annual retail bills (incl. GST) and NUOS as proportion of total bill, April 2021. Based on retail market offers (including guaranteed and pay on time discounts), single rate, 20,000 kWh per annum⁸⁶

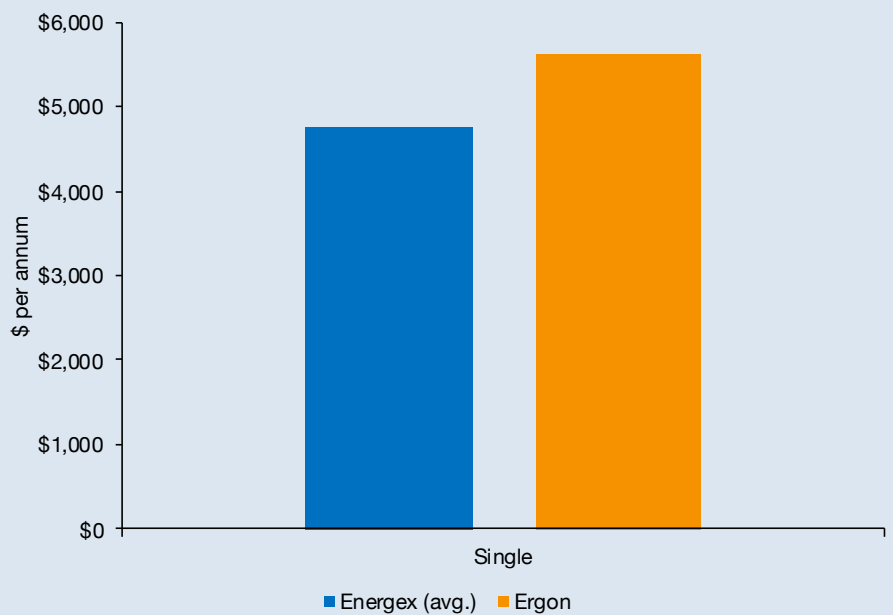


Regional Queensland

There is no effective retail competition in regional and northern Queensland (customers supplied by the Ergon Energy network) and small businesses in this area are therefore charged based on the regulated prices determined by the Queensland Competition Authority. As customers in the Ergon Energy network are generally unable to access discounted market offers by competitive retailers, they may pay more for electricity compared to businesses in South East Queensland. Compared to the DMO, however, customers using 20,000 kWh per annum in the Ergon Energy network will have an annual bill that is \$130 less than customers on the DMO.

Chart 86 shows that the average market offer in the Energex network (including discounts) is approximately \$880 less than the regulated offer in the Ergon Energy network for businesses using 20,000 kWh per annum. It is important to note that in determining the regulated retail rates for small customers in regional Queensland, the Queensland Competition Authority are required to use the equivalent Energex network rate, so that customers in regional Queensland pay a similar amount to customers in South East Queensland. The difference in the cost of supply is paid to the Ergon Energy retailer as a community service obligation by the Queensland Government.⁸⁷

CHART 86 | Annual bills for the single rate tariff in the Energex and Ergon Energy networks. Annual bills based on the regulated offer (Ergon Energy) and market offers including discounts (Energex) as of April 2021, 20,000 kWh per annum and GST inclusive



⁸⁶ Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Energex’s charges (tariff NTC 8500) for the 2020/21 financial year. The NUOS also includes fixed charges.

⁸⁷ QCA, SEQ retail electricity market monitoring: 2016–17, November 2017

4.3.2 Queensland gas bills April 2021

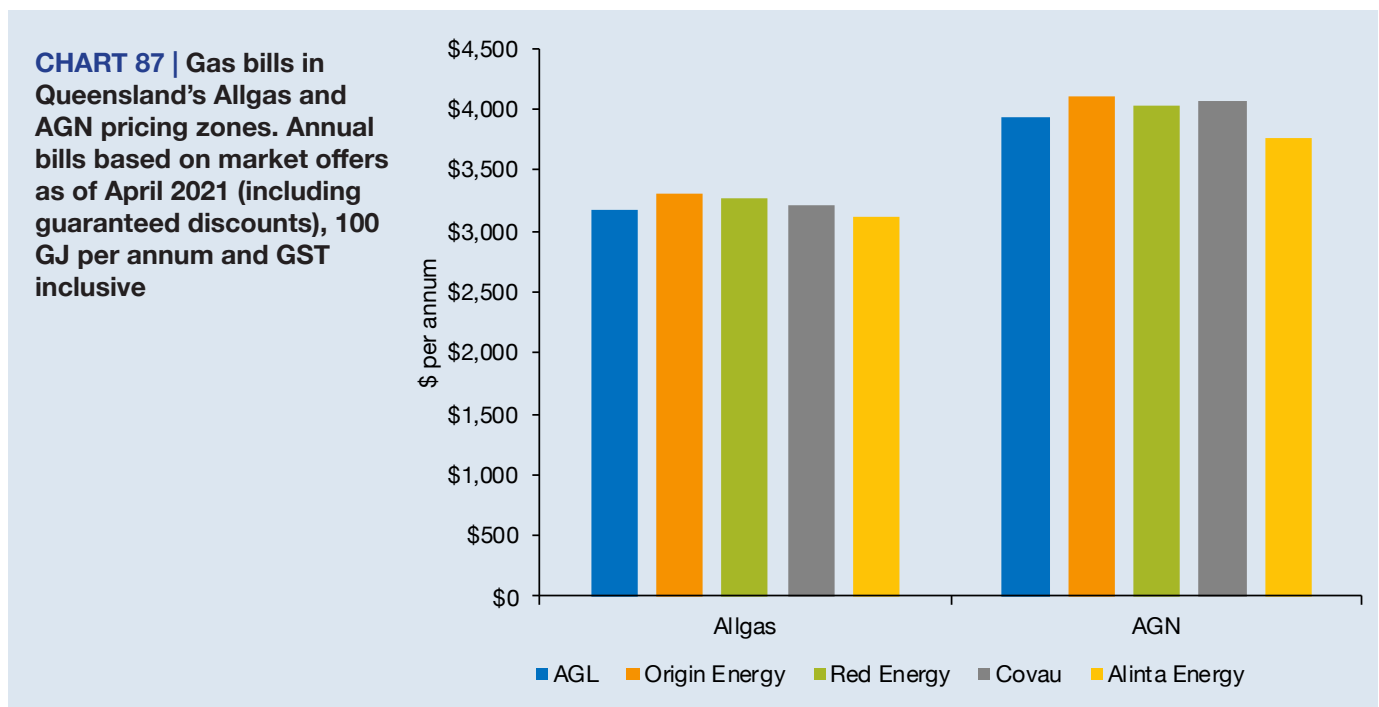
To calculate annual gas bills we have assumed an annual consumption of 100 GJ per annum and a flat consumption over the year (25 GJ per quarter or 16.66 GJ per bi-monthly bill). Small businesses using gas for heating purposes are unlikely to have a flat consumption profile.

The price-spread

There are two main gas zones in Queensland: the Allgas zone covering South Brisbane, Gold Coast, Toowoomba and Oakey, and the Australian Gas Networks (AGN) zone covering North Brisbane and Ipswich. AGL, Origin, Red Energy, CovaU, Discover Energy and Origin Energy have market offers in both areas. AGN also has two other pricing zones: Northern covering Rockhampton and Gladstone, and Wide Bay covering Bundaberg, Maryborough and Hervey Bay. Origin is the only retailer that offers contracts in the Northern pricing zones while AGL, Origin and CovaU have offers in the Hervey Bay area. Origin Energy and CovaU are currently the only gas retailers that offers additional discounts (a guaranteed 8% off usage charges for Origin Energy and 15% for CovaU).

The maximum price-spread is approximately \$200 in the Allgas zone and \$325 in the AGN zone. Compared to six months ago (October 2020), the maximum price-spread has increased by \$20 in the Allgas zone but has decreased by \$125 in the AGN zone.

The typical annual market offer bill for SMEs consuming 100 GJ per annum is approximately \$3,215 (including discounts) in the Allgas zone and \$3,980 in the AGN zone.⁸⁸ This is a significant difference for two gas zones that cover neighbouring areas. Chart 87 shows AGL, Origin, Red Energy, CovaU and Alinta Energy's annual bills for the two pricing zones.



Figures 19 - 20 below rank the retail offers from lowest to highest annual gas bills in the two main pricing zones.⁸⁹

⁸⁸ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

⁸⁹ These market offers were collected on the 7th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations

FIGURE 19 | Lowest to highest annual gas bills (incl GST) for market offers in the **Allgas pricing zone** (April 2021). Bills including guaranteed discounts - SMEs consuming 100 GJ per annum


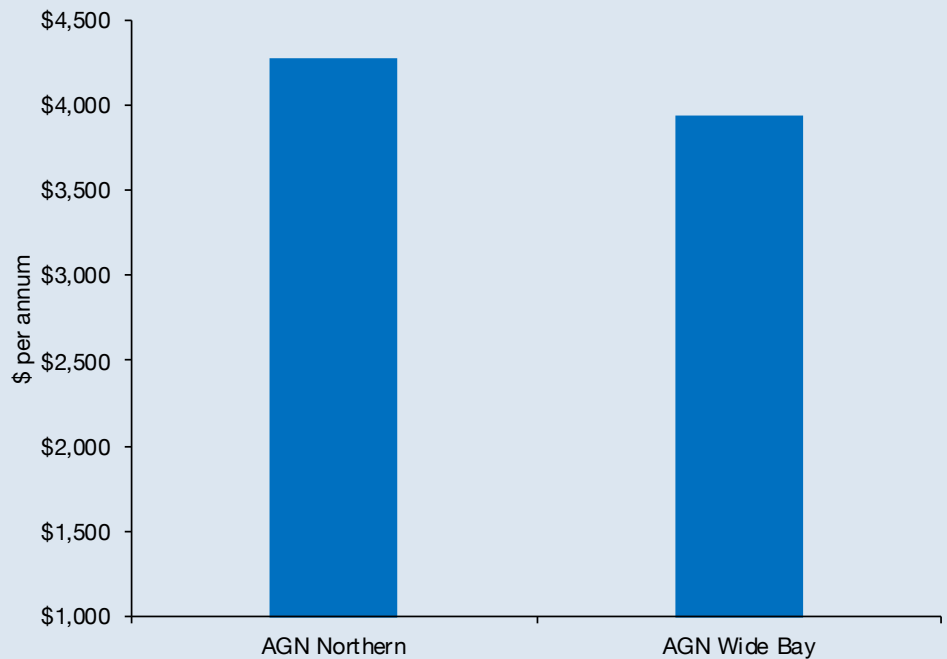
	Alinta Energy	\$3,114
	AGL	\$3,171
	Covau	\$3,207
	Red Energy	\$3,272
	Origin Energy	\$3,314

FIGURE 20 | Lowest to highest annual gas bills (incl GST) for market offers in the **AGN pricing zone** (April 2021). Bills including guaranteed discounts - SMEs consuming 100 GJ per annum

	Alinta Energy	\$3,770
	AGL	\$3,940
	Red Energy	\$4,025
	Covau	\$4,070
	Origin Energy	\$4,094

In the two smaller AGN pricing zones (Northern and Wide Bay), Origin Energy’s annual bills for this consumption level amount to approximately \$4,270 and \$3,940 respectively. However, AGL and Covau do have an offer in Hervey Bay pricing zone and AGL’s offer produces an annual bill that is almost \$400 less than Origin’s offer

CHART 88 | Origin gas bills in Queensland’s AGN Northern and AGN Wide Bay pricing zones. Annual bills based on market offers as of April 2021 (including guaranteed discounts), 100 GJ per annum and GST inclusive



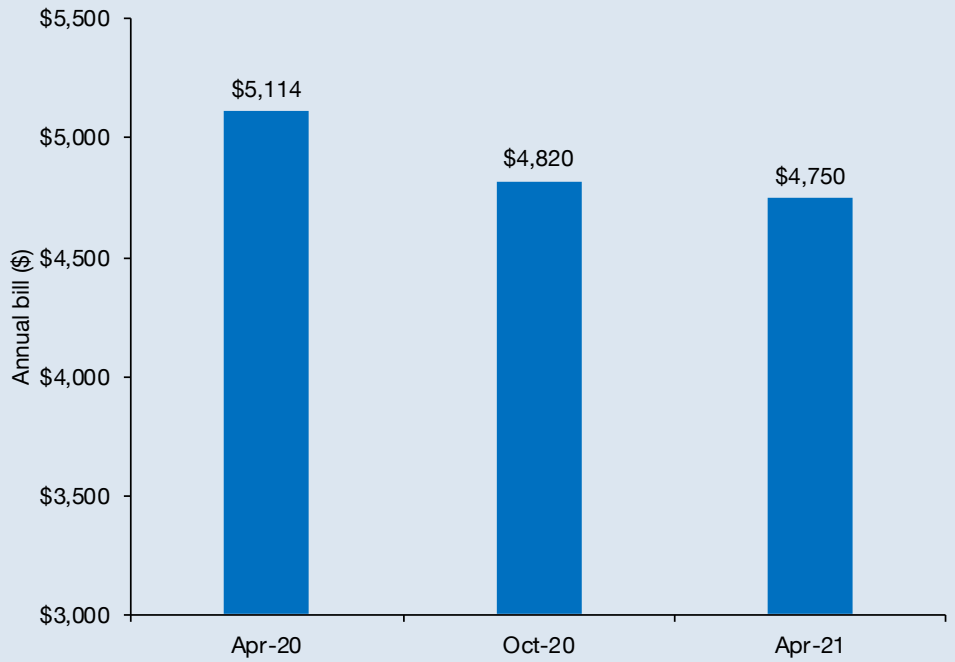
4.3.3 Changes in energy bills in Queensland

This section compares annual energy bills as of October 2020 to bills as of April 2021. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2021.

In Queensland, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months. However, some retailers have still changed their offers (rates, discounts or both).

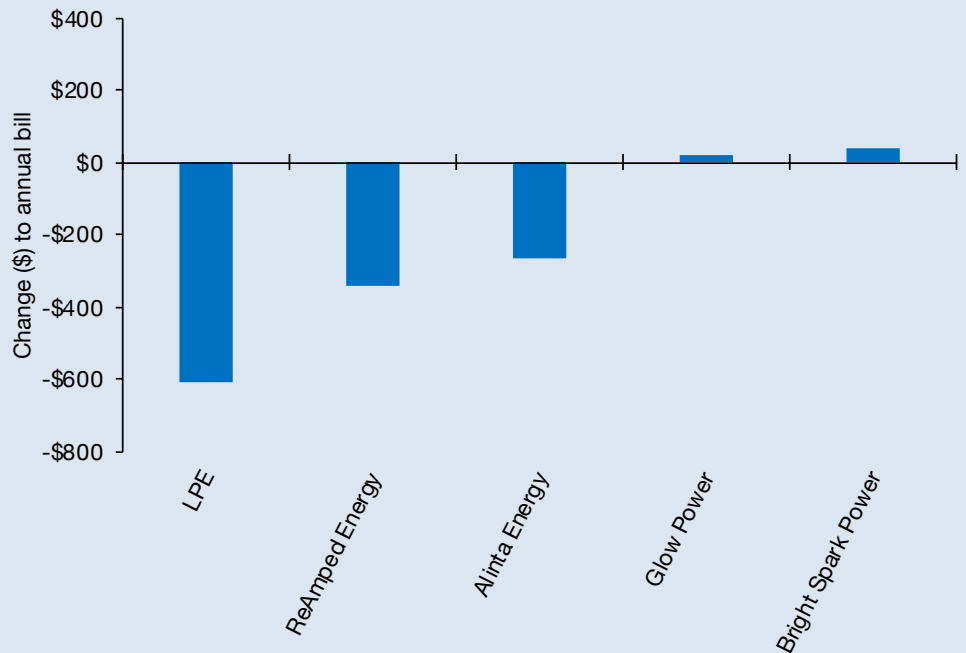
The average annual market offer bill has decreased by \$70 (or 1.4%) in the Energex network since October 2020. Chart 89 below shows average annual bills as of April 2020, October 2020 and April 2021.

CHART 89 | Average annual electricity bills as of April 2020, October 2020 and April 2021 including guaranteed discounts and pay on time discounts in the Energex network. Annual bills based on market offers, single rate, 20,000 kWh per annum and GST inclusive



Three retailers have decreased their prices since October 2020, two have slight increases, and eighteen retailers have not changed their offers. Chart 90 below shows changes to annual bills for each retailer from October 2020 to April 2021.⁹⁰

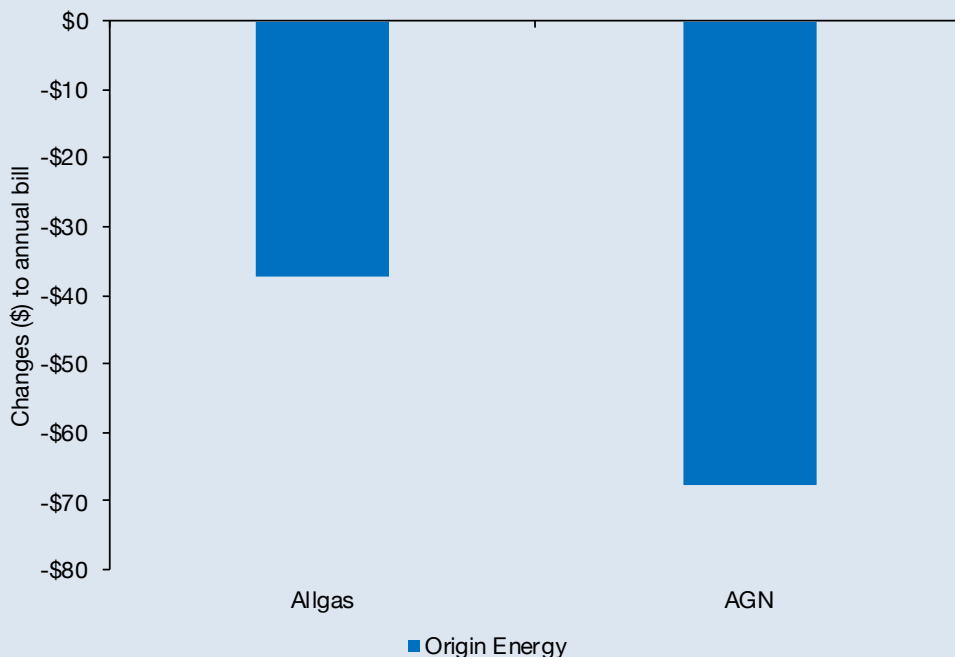
CHART 90 | Bill change: Comparison of October 2020 to April 2021 annual electricity bills including guaranteed discounts and pay on time discounts in the Energex network. Annual bills based on market offers as of October 2020 to April 2021, 20,000 kWh per annum, single rate and GST inclusive



In relation to gas, Origin’s gas bills have decreased by around 1 to 2% since April 2021. AGL, Red Energy and CovaU’s annual bills have remained unchanged. Alinta Energy is a new gas retailer in Queensland and did not have any offers in October 2020.

⁹⁰ Based on market offers inclusive of guaranteed and conditional pay on time discounts. Note that only retailers that have changed their offers during this period are included in this chart.

CHART 91 | Bill change:
Comparison of Origin Energy's October 2020 and April 2021 annual gas bills including guaranteed discounts and pay on time discounts in the Allgas and AGN pricing zones. Annual bills based on market offers as of October 2020 and April 2021, 100 GJ per annum and GST inclusive

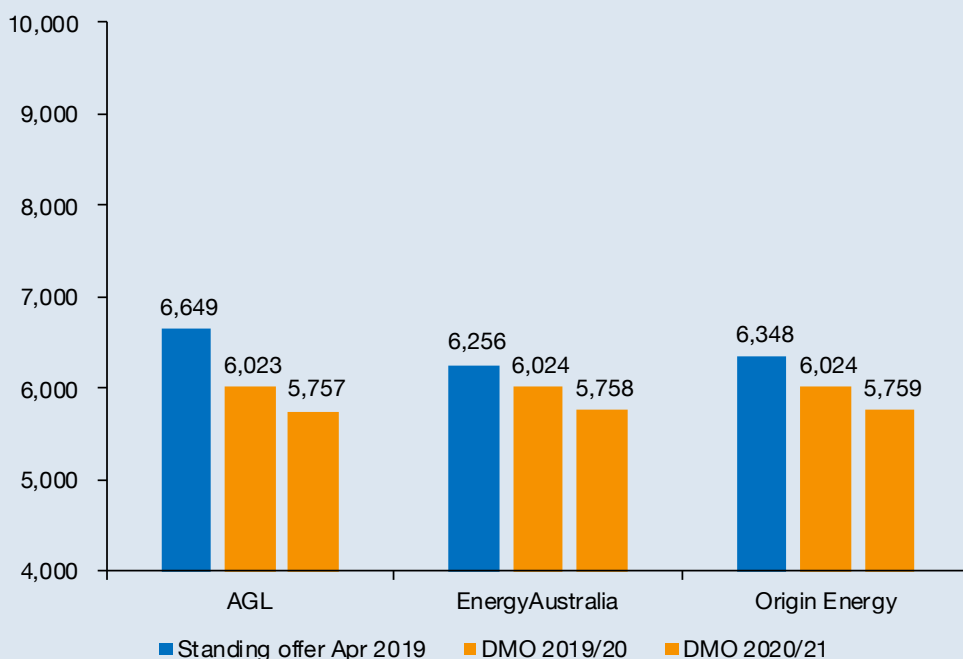


4.3.4 Impact of the DMO

Initially, the introduction of the DMO on 1 July 2019 had little impact on additional discounting in South East Queensland. Over the last eighteen months, however, many retailers have ceased offering additional discounts. Importantly, none of the retail market offers, inclusive of discounts, produce annual bills that are greater than the DMO (see section 4.3.1 above).⁹¹

Businesses previously on a standing offer with one of the 'big 3' retailers (AGL, Energy Australia and Origin Energy) will have experienced bill reductions since the introduction of the DMO. Chart 92 below compares AGL, Energy Australia and Origin Energy's standing offers prior to the DMO taking effect to the DMO as of 2019/20 and 2020/21. It shows that the bills are currently between \$500 and \$890 less compared to April 2019 (depending on the retailer) for businesses using 20,000 kWh per annum. AGL's bill has reduced the most (by approximately \$890) while Energy Australia and Origin Energy's bill reductions are somewhat more modest at \$500 and \$590 respectively.

CHART 92 | The DMO compared to the 'big 3' retailers' standing offers in the Energex network. Annual electricity bills for SMEs using 20,000 kWh (single rate) per annum. GST inclusive.



⁹¹ Market offer bills including guaranteed discounts compared to the DMO.

4.4 South Australia

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

4.4.1 South Australian electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO⁹² shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in South Australia Power Networks is 14,262 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The price-spread

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$7,215.⁹³ Chart 93 shows annual bills for twenty-one retailers in the SA Power Networks (SAPN) and that the maximum price-spread is approximately \$2,475 per annum. If we exclude the single lowest and single highest bills, however, the maximum price-spread is reduced to \$2,035. Compared to six months ago (October 2020), the maximum price-spread has remained unchanged.

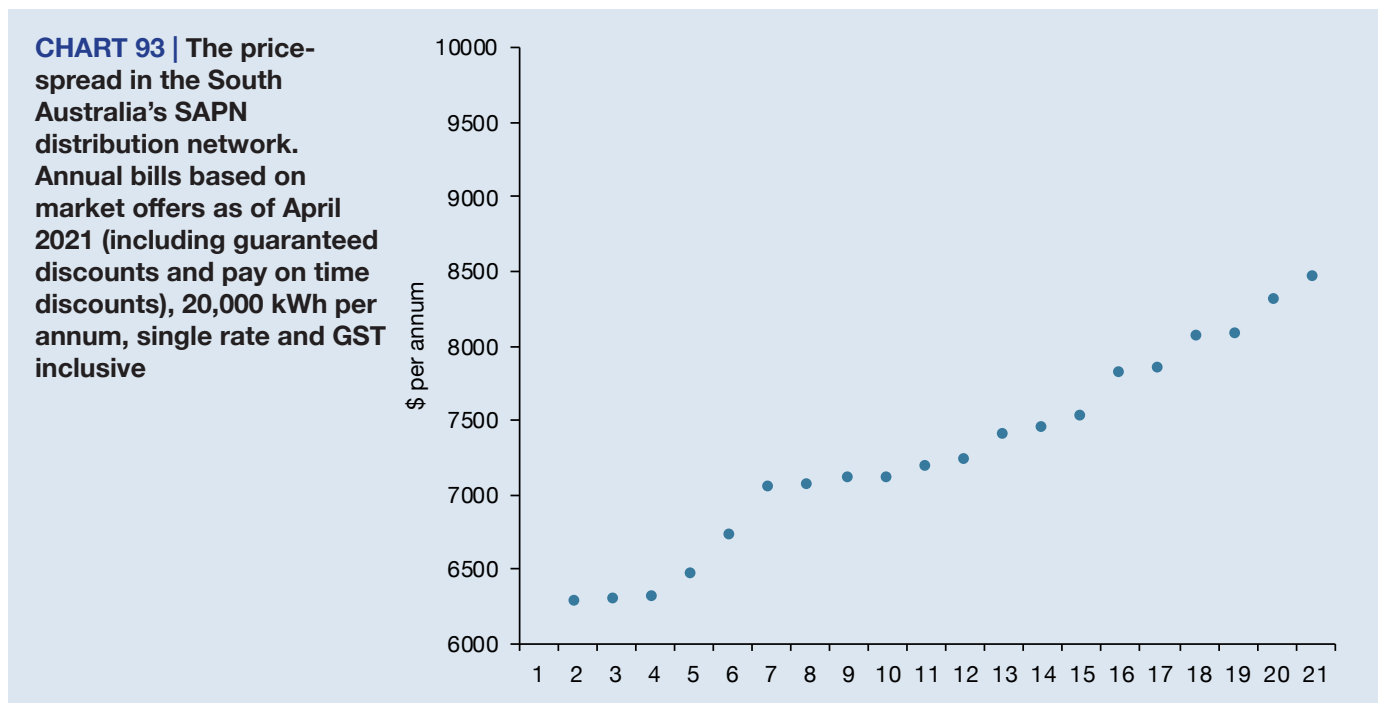























Figure 21 below ranks the retail offers from lowest to highest annual electricity bills.⁹⁴

⁹² Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

⁹³ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers.

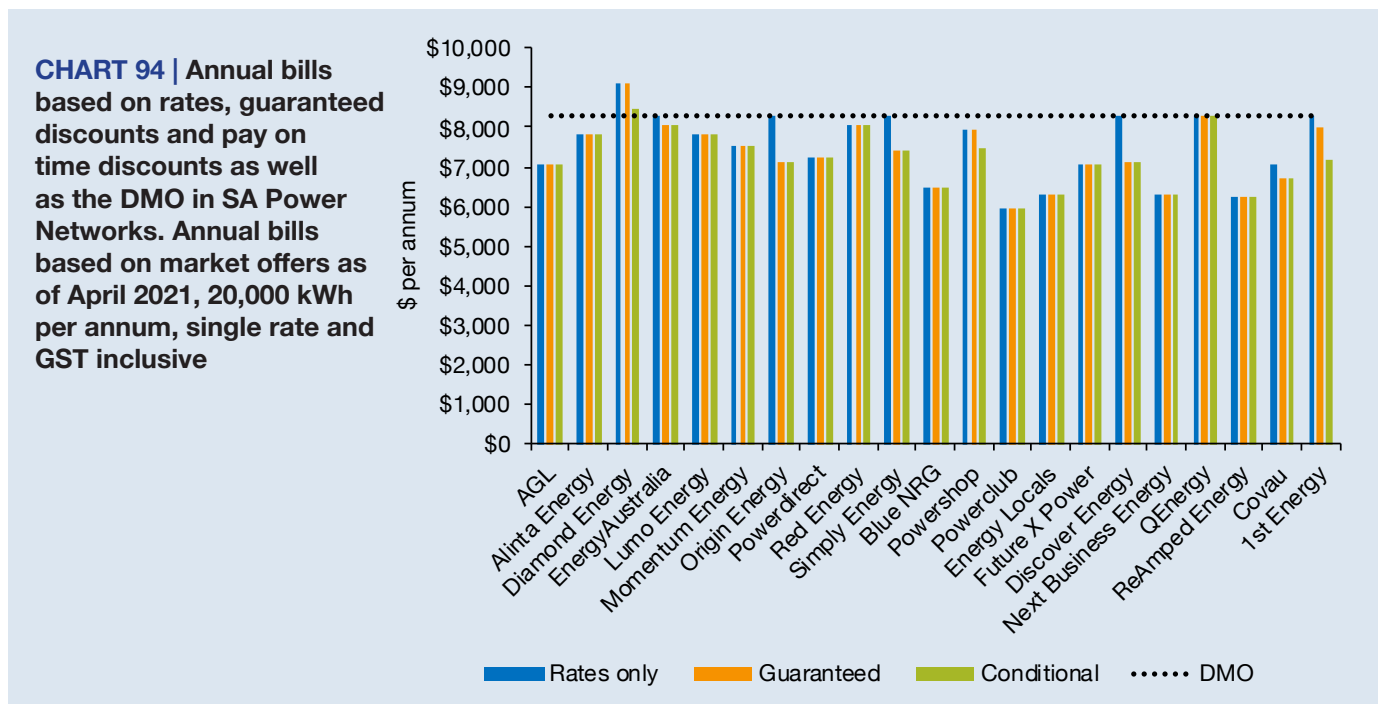
⁹⁴ These market offers were collected on the 8th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

FIGURE 21 | Lowest to highest annual electricity bills (incl GST) for **South Australian market offers** (April 2021)
Including discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)

	Powerclub	\$5,971		Discover Energy	\$7,104		Alinta Energy	\$7,805
	ReAmped Energy	\$6,268		Origin Energy	\$7,108		EnergyAustralia	\$8,055
	Next Business Energy	\$6,284		1st Energy	\$7,172		Red Energy	\$8,071
	Energy Locals	\$6,298		Powerdirect	\$7,222		QEnergy	\$8,303
	BlueNRG	\$6,455		Simply Energy	\$7,391		Diamond Energy	\$8,447
	CovaU	\$6,721		Powershop	\$7,442			
	Future X Power	\$7,036		Momentum Energy	\$7,512			
	AGL	\$7,057		Lumo Energy	\$7,805			

Additional discounts

Currently, only three of the twenty-one retailers operating in South Australia offer conditional pay on time discounts (Powershop, Diamond Energy and 1st Energy). For customers using 20,000kWh per annum, this conditional discount can be worth as much as \$800 per annum (1st Energy's offer). Five other retailers (Energy Australia, Origin, Simply Energy, Discover Energy and CovaU) offer guaranteed discounts while the remaining thirteen retailers do not offer any additional discounts. The practice of discounting has thus continued to reduce in South Australia. Chart 94 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discounts.⁹⁵ The chart also compares the market offers to the DMO and it shows that all retailers have market offers that produce bills that are similar or lower than the DMO. It should be noted, however, that Diamond Energy's would be more than the DMO if the conditional pay on time discount is not obtained.



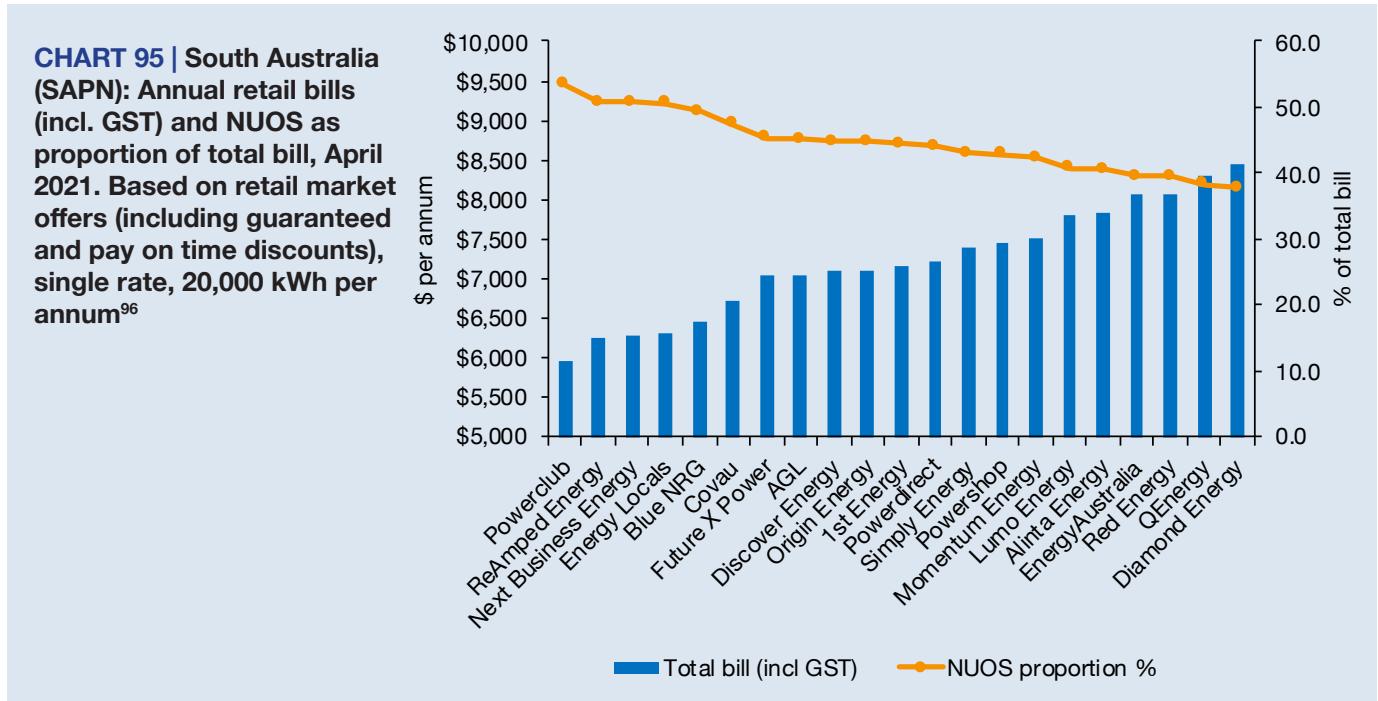
⁹⁵ Note that Powershop's conditional discount is not a conventional pay on time discount as customers obtain the discount by pre-purchasing "specials". Origin Energy and Powershop's discounts are applied to amounts inclusive of GST while all other discounts are applied to amounts exclusive of GST.

Network charges

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

The chart presented in this section shows that the NUOS proportion of bills varies significantly between retail offers. The NUOS proportion of the bill for Powerclub is 53.4% while the NUOS comprises around 38% of the total bill for Diamond Energy customers.

Chart 95 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).



4.4.2 South Australian gas bills April 2021

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

The price-spread

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$3,585 (including discounts). Chart 96 shows annual bills for seven retailers in South Australia and that the maximum price-spread is approximately \$640 per annum.⁹⁷ Compared to six months ago (October 2020), the maximum price-spread has increased by \$210.

⁹⁶ Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the SAPN's charges for the 2020/21 financial year. The NUOS also includes fixed charges.

⁹⁷ See appendix A for a list of retail offers included in this analysis. Many retailers have more than one market offer and the rates, conditions, size of discounts as well as discount types (e.g. guaranteed or conditional) may vary between their offers..

CHART 96 | The price-spread in the South Australia. Annual bills based on market offers as of April 2021 (including guaranteed discounts and pay on time discounts), 100 GJ per annum and GST inclusive

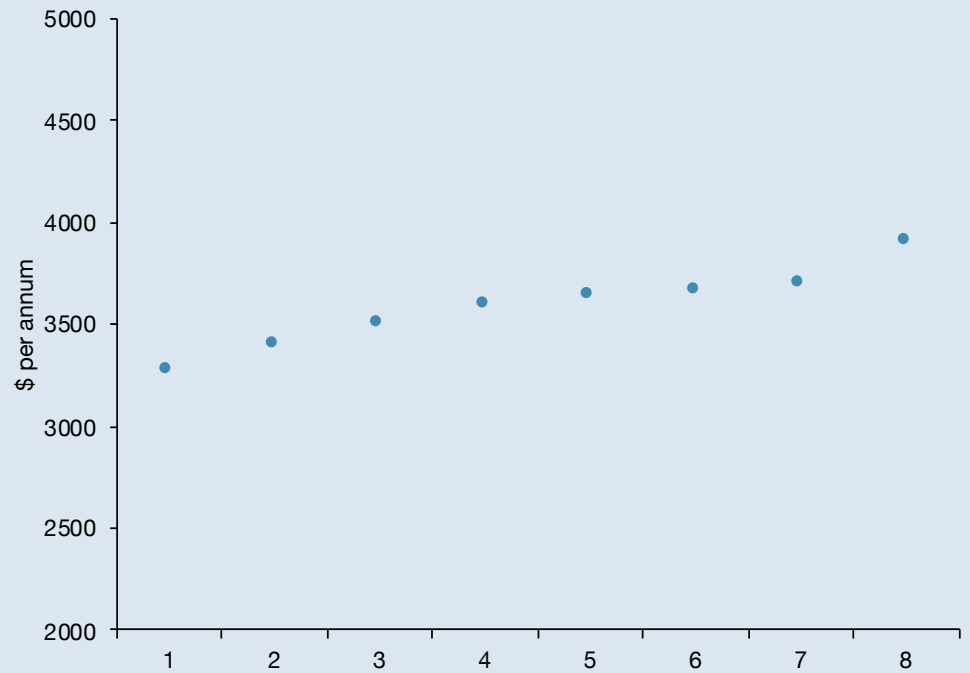



Figure 22 below ranks the retail offers from lowest to highest annual gas bills.⁹⁸ Compared to six months ago, the lowest annual retail bill has remained unchanged (since October 2020).

FIGURE 22 | Lowest to highest annual gas bills (incl GST) for market offers in South Australia (Australian Gas Network), April 2021.

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

	Lumo Energy	\$3,268
	Red Energy	\$3,394
	Simply Energy	\$3,503
	Origin Energy	\$3,595
	AGL	\$3,642
	Discover Energy	\$3,667
	EnergyAustralia	\$3,696
	Alinta Energy	\$3,907

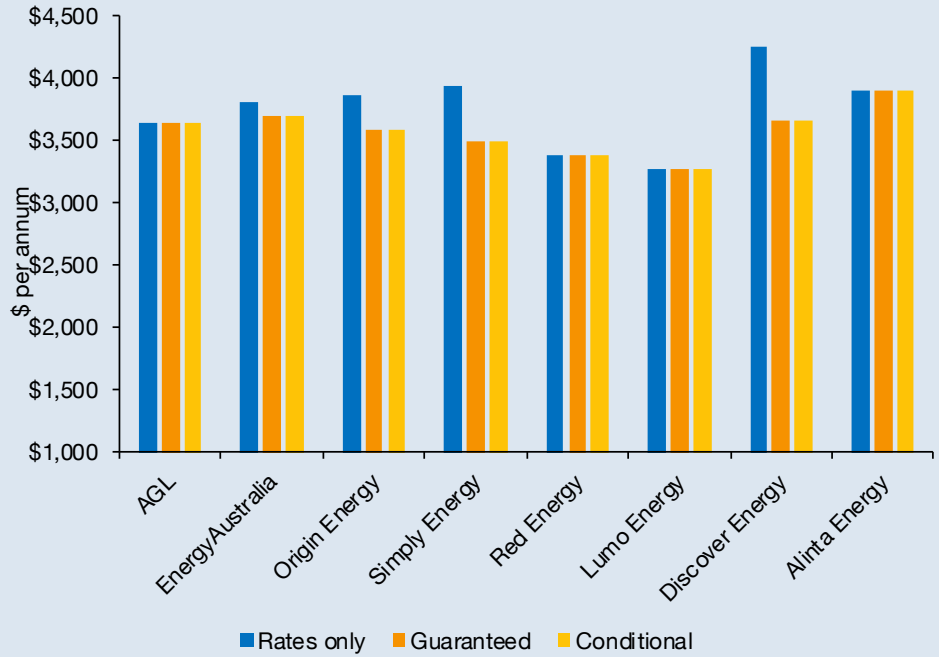
Additional discounts

Four of the retailers, Energy Australia, Origin Energy, Simply Energy and Discover Energy offer additional discounts and they are all guaranteed discounts (3% off bill, 8% off usage, 11% off bill and 15% off usage, respectively).

Chart 97 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discounts.

⁹⁸ These market offers were collected in October 2020 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

CHART 97 | Annual bills based on rates, guaranteed and conditional discounts in South Australia (Australian Gas Networks). Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive



4.4.3 Changes in energy bills in South Australia

This section compares annual energy bills as of April 2021 to bills as of October 2020. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2021.

In South Australia, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months. However, retailers can still change their offers (rates, discounts or both) and they often do but there has been very little change in South Australia since October 2020.

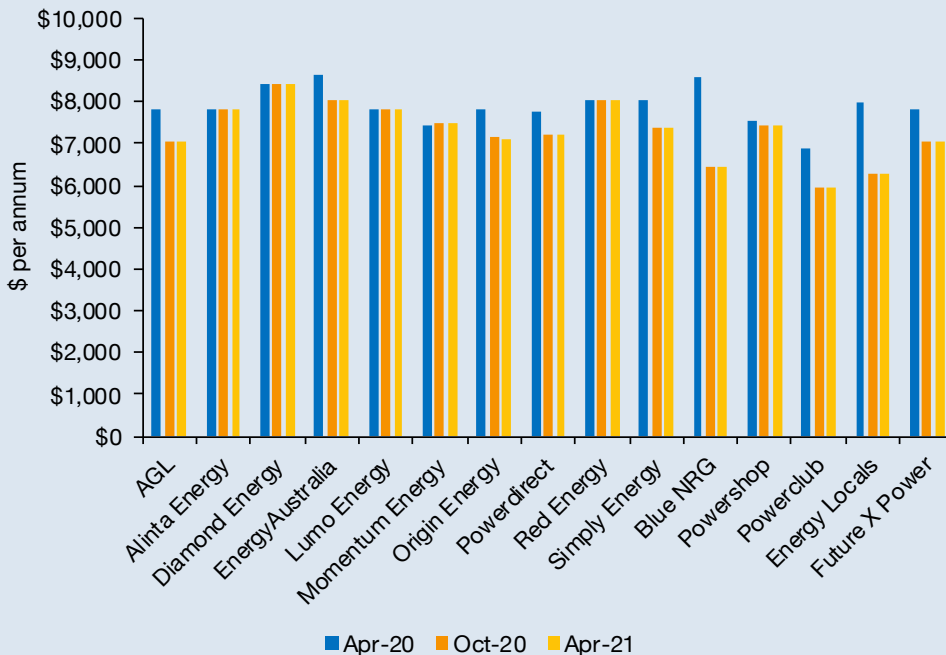
On average, annual bills have reduced by approximately \$30, or less than 1%, for businesses consuming 20,000 kWh (single rate) since October 2020. Only one retailer, Origin Energy, has changed its offer over the last six months.⁹⁹

Chart 98 below shows retailers' annual bills as of April 2020, October 2020, April 2021.¹⁰⁰

⁹⁹ Based on market offers inclusive of guaranteed and conditional pay on time discounts

¹⁰⁰ Note that some retailers such as Click Energy and Commander did not have offers in April 2021. Only retailers with market offers available over the three data collection points (April 2020, October 2020, April 2021) have been included in this comparison.

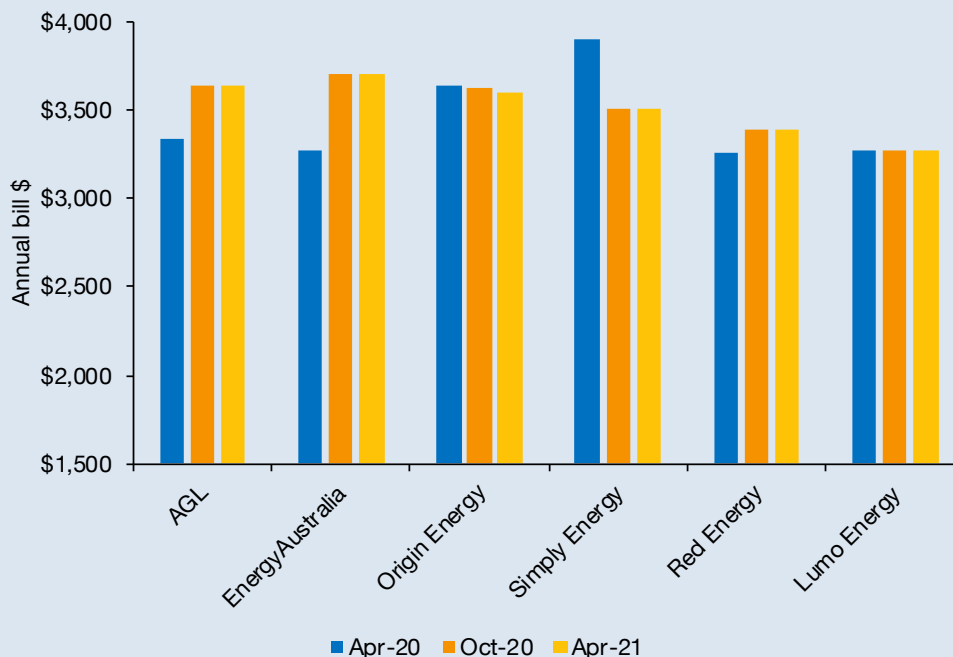
CHART 98 | Bill change: Comparison of April 2020, October 2020, April 2021 annual electricity bills including guaranteed discounts and pay on time discounts in the SA Power Networks. Annual bills based on market offers as of April 2020, October 2020, April 2021, 20,000 kWh per annum, single rate and GST inclusive



In relation to gas, only Origin Energy has changed their offer between October 2020 and April 2021. Origin Energy’s offer produces an annual bill that is \$35 (or 1%) lower compared to 6 months ago.

Chart 99 below shows annual gas bills in the Envestra/AGN gas zone as of April 2020, October 2020, April 2021

CHART 99 | Annual gas bills including guaranteed discounts and pay on time discounts in South Australia. Annual bills based on market offers as of April 2020, October 2020, April 2021, 100 GJ per annum and GST inclusive

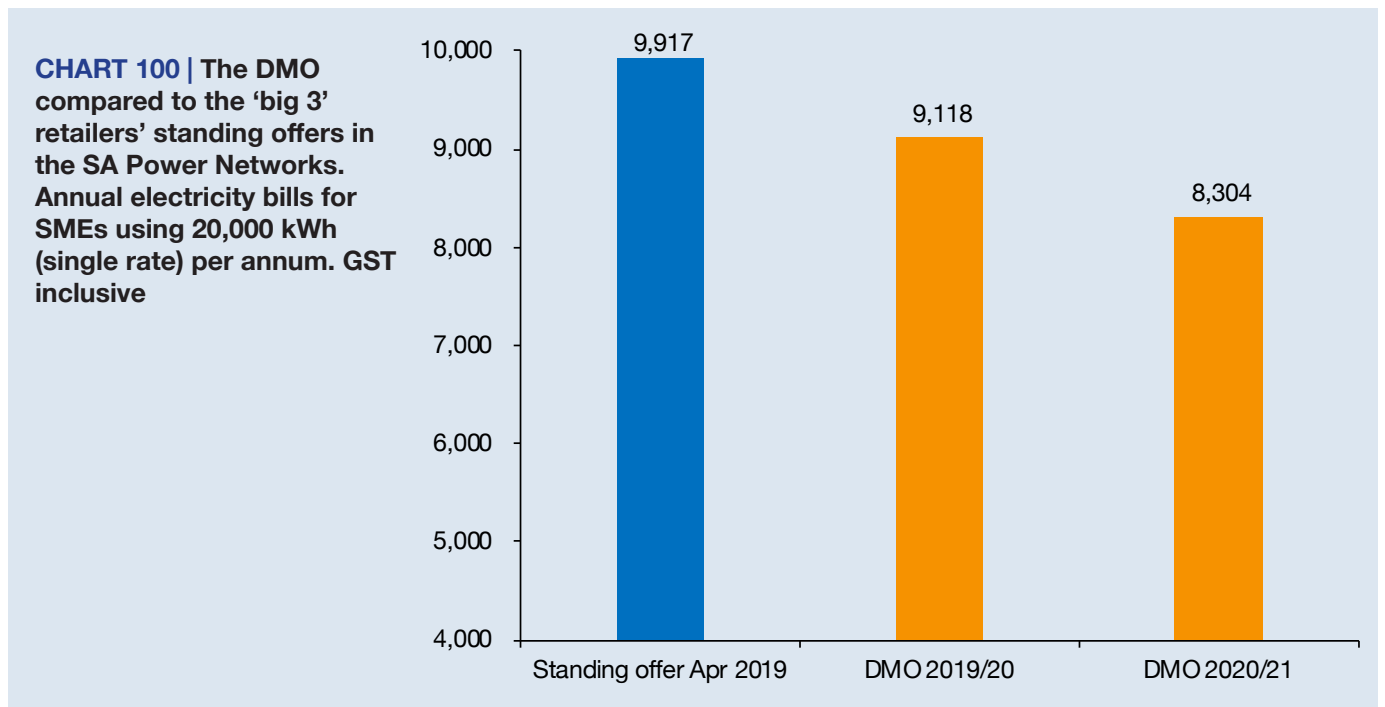


4.4.4 Impact of the DMO

Since the introduction of the DMO on 1 July 2019, fewer retailers offer conditional pay on time discounts compared to previously.

Businesses previously on a standing offer with AGL or Energy Australia will have experienced significant bill reductions since the introduction of the DMO. Chart 100 below compares AGL, Energy Australia and Origin Energy’s standing offers prior to the DMO taking effect to the DMO as of 2019/20 and 2020/21. It shows that the bills are currently between \$805 and \$2,535 less compared to April 2019 (depending on

the retailer) for businesses using 20,000 kWh per annum. Energy Australia's bill has reduced the most (by approximately \$2,535) while AGL and Origin Energy's bill reductions are somewhat lower at \$1,500 and \$805 respectively.



4.5 Tasmania

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

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

4.5.1 Tasmanian electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO¹⁰¹ shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in TasNetworks is 25,315 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) in Tasmania is currently around \$5,470.¹⁰² SMEs switching from Aurora Energy's regulated offer to the 1st Energy's market offer may save around \$280 per annum. SMEs switching from Aurora Energy to, Future X Power, could save \$80 per annum.

Figure 23 below ranks the retail offers from lowest to highest annual electricity bills.¹⁰³

FIGURE 23 | Lowest to highest annual electricity bills (incl GST) for **Tasmanian offers**, April 2021
SMEs consuming 20,000 kWh per annum, single rate

	1st Energy	\$5,309
	Future X Power	\$5,509
	Aurora Energy	\$5,590

Network charges

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

The chart presented in this section shows that the NUOS proportion of bills is largely similar for all three retailers. As 1st Energy's offer produces a slightly lower retail bill (inclusive of pay on time discounts), the NUOS proportion of the bill for 1st Energy is 36.9% while the NUOS is 35% of the total bill for Aurora Energy customers.

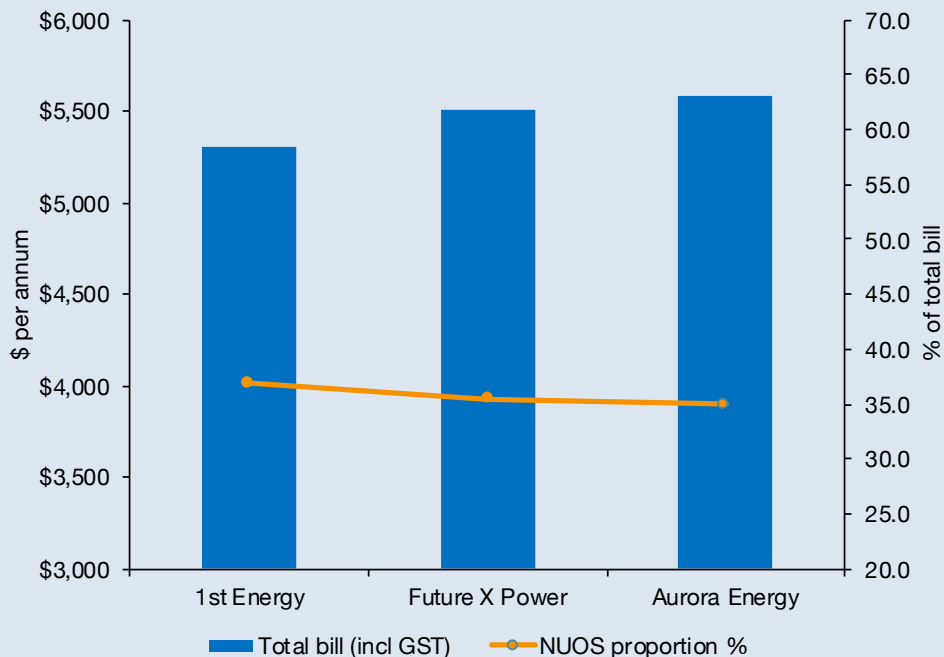
Chart 101 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

¹⁰¹ Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

¹⁰² Based on the Aurora Energy, 1st Energy and Future X Power (which is a recent entrant in the Tasmanian electricity retail market) average. In the previous report we compared Aurora Energy and 1st Energy only.

¹⁰³ These offers were collected in October 2020 and it should be noted that retailers may change their rates at any time.

CHART 101 | Tasmania (TasNetworks): Annual retail bills (incl. GST) and NUOS as proportion of total bill, for April 2021. Based on Aurora Energy's regulated offer and 1st Energy's market offer, 20,000 kWh per annum¹⁰⁴

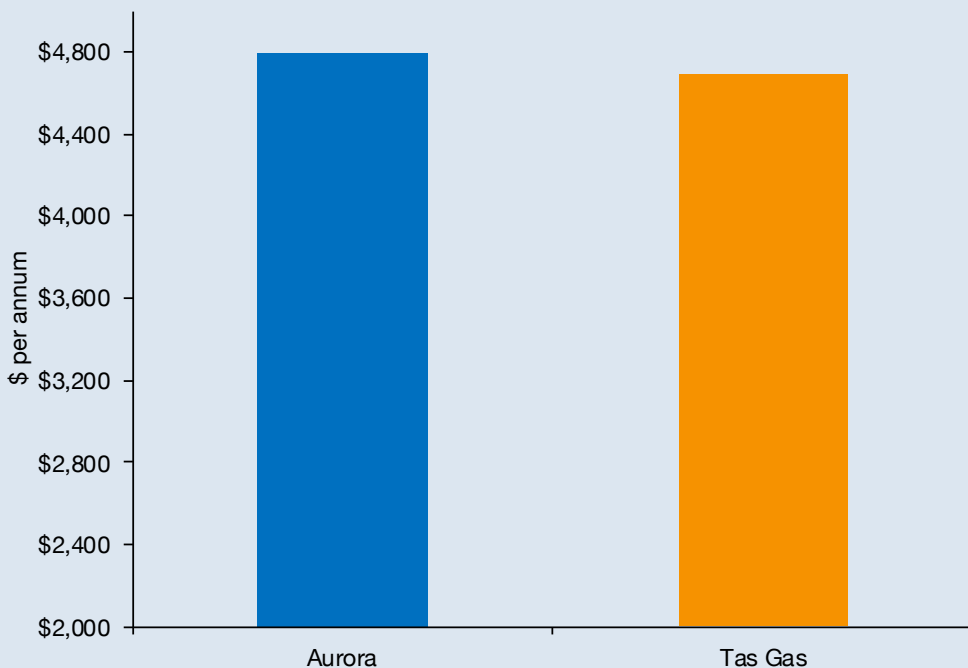


4.5.2 Tasmanian gas bills April 2021

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

There are two retailers, Aurora Energy and Tas Gas Retail, offering market contracts to gas customers in Tasmania and the typical annual bill for a SME customer using 100 GJ per annum is \$4,740. The difference between the two offers is approximately \$110 per annum. Neither Aurora Energy nor Tas Gas Retail offer any additional discounts.



CHART 102 | Annual gas market offer bills in Tasmania. Annual bills based on market offers as of April 2021, 100 GJ per annum and GST inclusive



¹⁰⁴ Based on retail offer rates as April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the TasNetworks's charges (tariff Tas 22) for the 2020/21 financial year. The NUOS also includes fixed charges.

Figure 24 below ranks the retail offers from lowest to highest annual gas bills.¹⁰⁵

FIGURE 24 | Lowest to highest annual gas bills (incl GST) for **Tasmanian market offers**, April 2021
SMEs consuming 100 GJ per annum

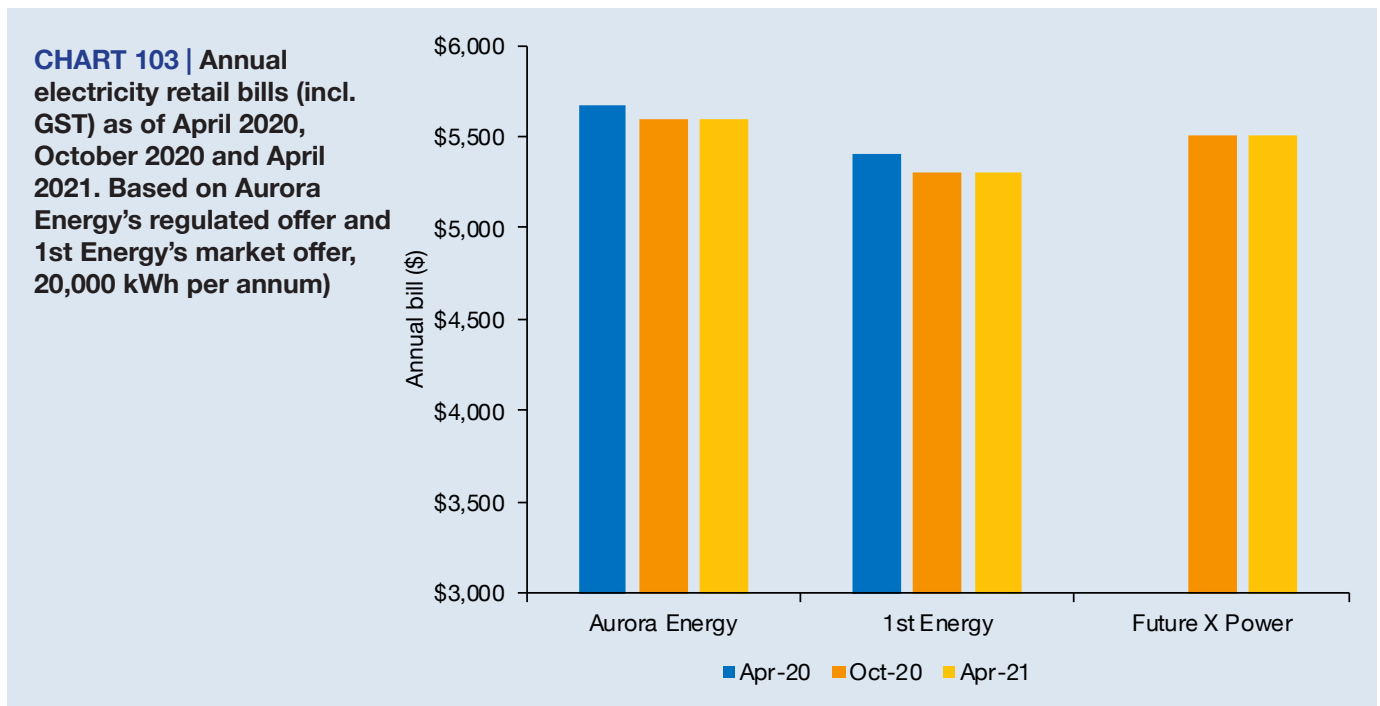
	Tas Gas	\$4,686
	Aurora Energy	\$4,796

4.5.3 Changes in energy bills in Tasmania

This section compares annual energy bills as of April 2021 to bills as of October 2020. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2021.

In Tasmania, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months. However, retailers can still change their offers (rates, discounts or both), and they often do, but there have been no changes to Tasmanian energy retail offers in Tasmania since October 2020.

Chart 103 below shows annual electricity bills for Aurora Energy and 1st Energy as of April 2020, October 2020 and April 2021.¹⁰⁶

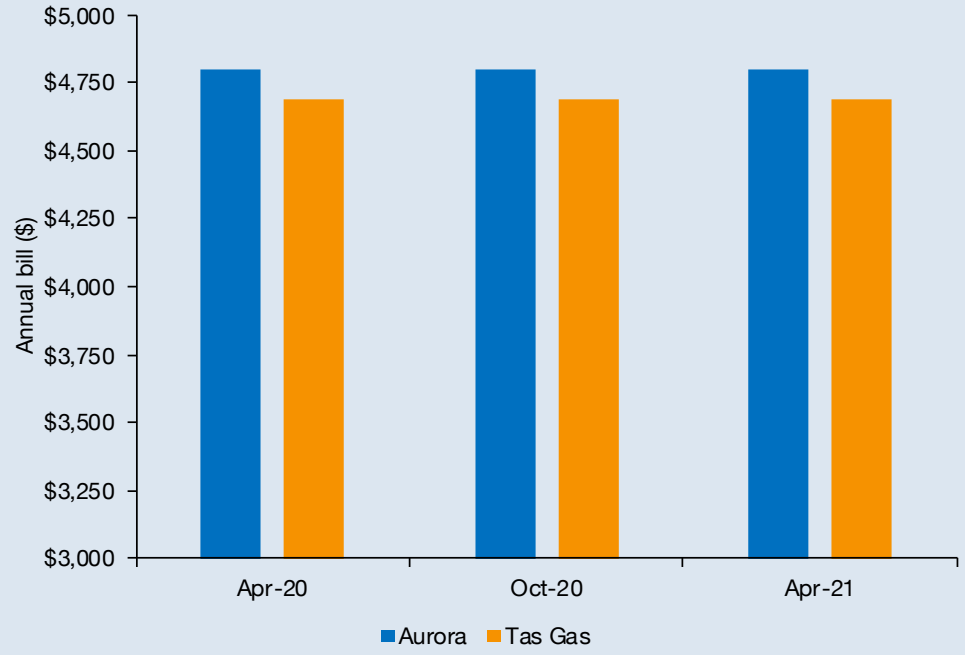


In relation to gas, Aurora Energy and Tas Gas Retail's rates remain unchanged since April 2020. Chart 104 below shows annual gas bills for Aurora and Tas Gas Retail as of April 2020, October 2020 and April 2021.

¹⁰⁵ These offers were collected on the 15th of April 2021 and it should be noted that retailers may change their rates at any time.

¹⁰⁶ Future X Power did not have any offers in April 2020.

CHART 104 | Annual gas bills from April 2020, October 2020 and April 2021 in Tasmania. Annual bills based on 100 GJ per annum and GST inclusive



4.6 Australian Capital Territory (ACT)

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

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

4.6.1 ACT electricity bills April 2021

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO¹⁰⁸ shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. According to the AEMO report, average consumption for a small business in the Evoenergy network is 32,257 kWh per annum. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

The price-spread

The typical annual bill for SMEs consuming 20,000 kWh per annum (single rate) is approximately \$5,730.¹⁰⁹ Chart 105 shows annual bills for seven retailers in the Evoenergy distribution network and that the maximum price-spread is \$740 per annum. Compared to six months ago (October 2020), the maximum price-spread has decreased slightly (by \$20).

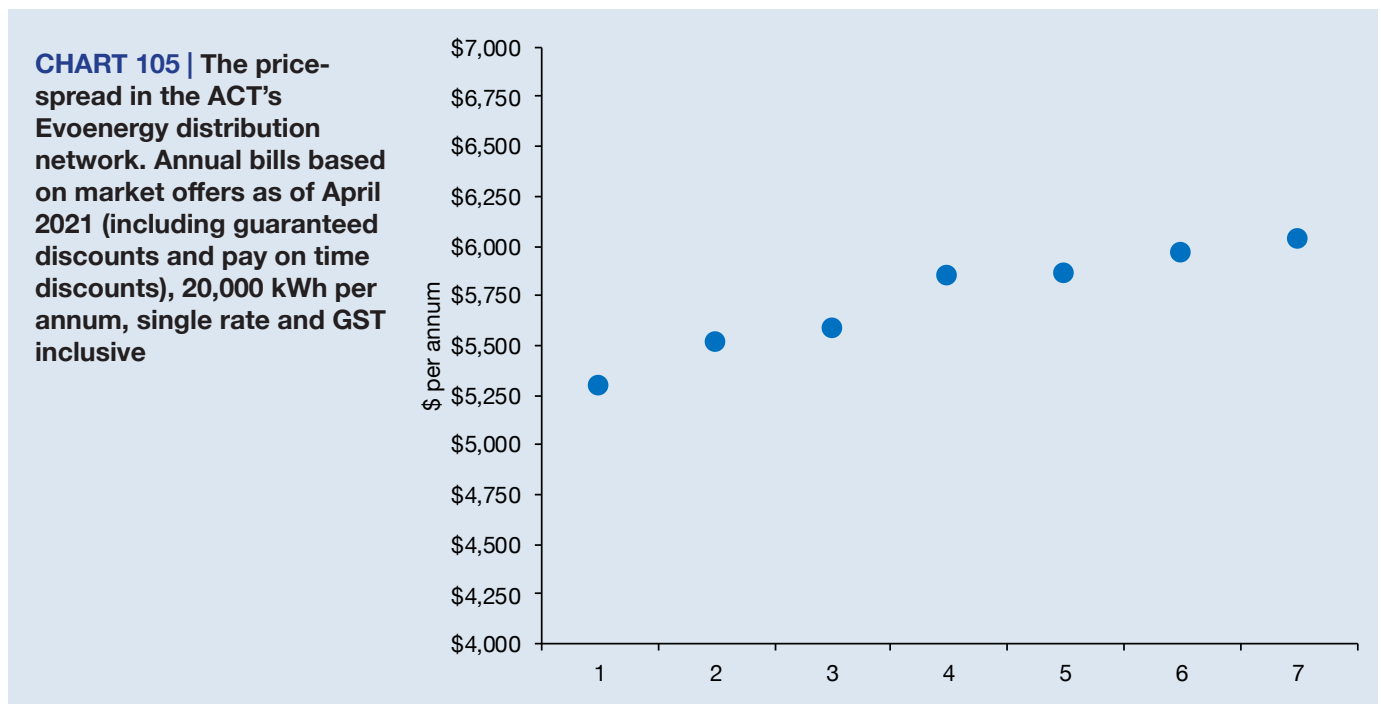


Figure 25 below ranks the retail offers from lowest to highest annual bills.¹¹⁰ The lowest annual retail bill has remained unchanged since October 2020.






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

¹⁰⁸ Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

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

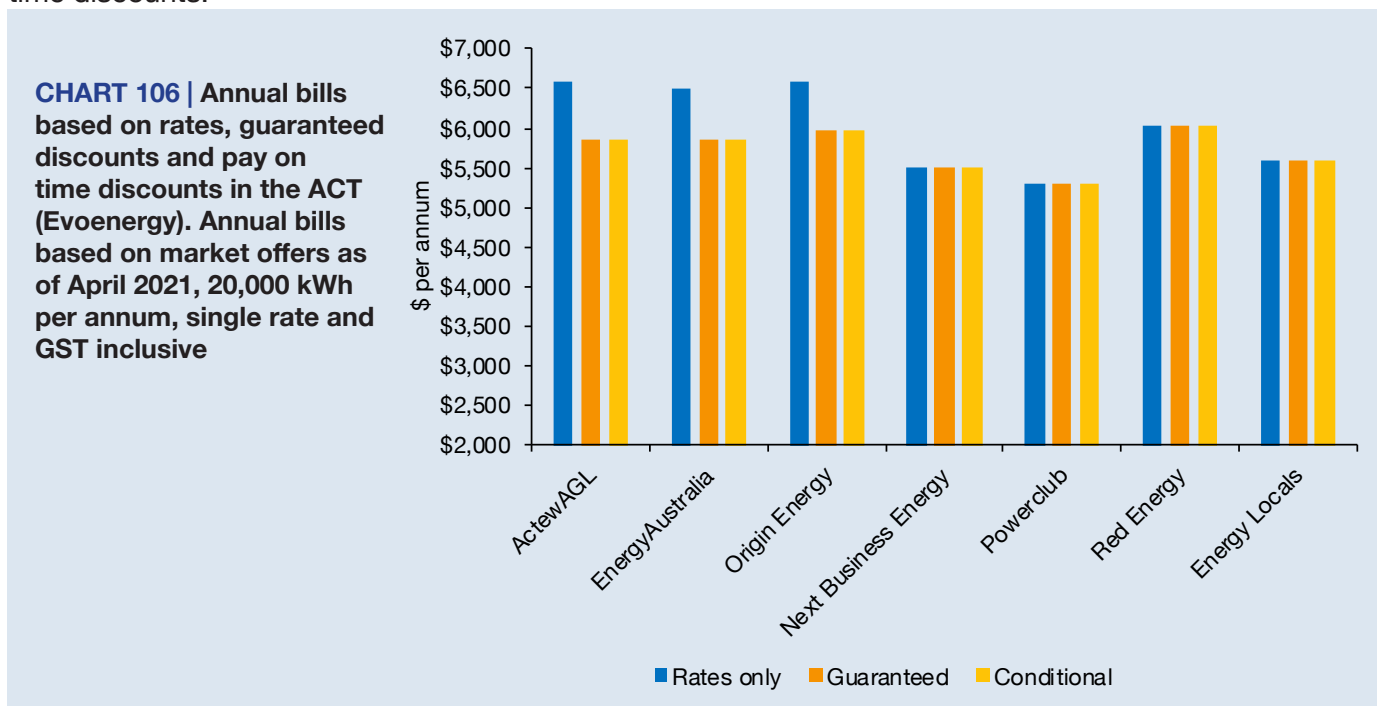
¹¹⁰ These market offers were collected on the 18th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

FIGURE 25 | Lowest to highest annual bills (incl GST) for market offers in **ACT's Evoenergy (formerly ActewAGL)** (April 2021). *Is including guaranteed discounts and pay on time discounts - SMEs consuming 20,000kWh per annum (single rate)*

	Powerclub	\$5,293
	Next Business Energy	\$5,514
	Energy Locals	\$5,590
	ActewAGL	\$5,853
	EnergyAustralia	\$5,860
	Origin Energy	\$5,970
	Red Energy	\$6,033

Additional discounts

Three retailers, ActewAGL, Energy Australia and Origin Energy, offer guaranteed discounts and none of the retailers currently offer conditional pay on time discounts. Chart 106 shows annual bills based on their rates only, inclusive of guaranteed discounts and inclusive of guaranteed as well as conditional pay on time discounts.¹¹¹



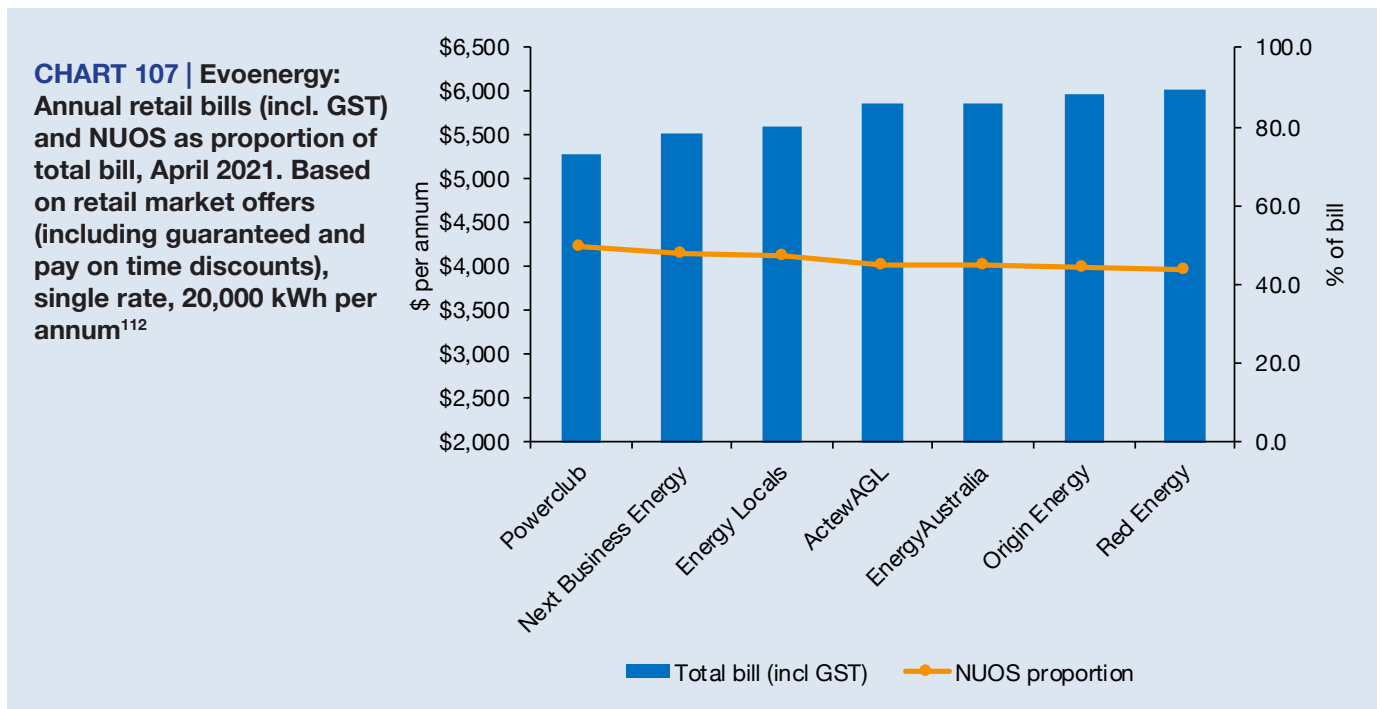
Network charges

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

The chart presented in this section shows that the NUOS proportion of bills varies slightly between retail offers. The NUOS proportion of the bill for Powerclub is 49.9% while the NUOS comprises 43.7% of the total bill for Red Energy customers.

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

Chart 107 shows annual retail bills (columns) and NUOS as proportion of annual bill (line).

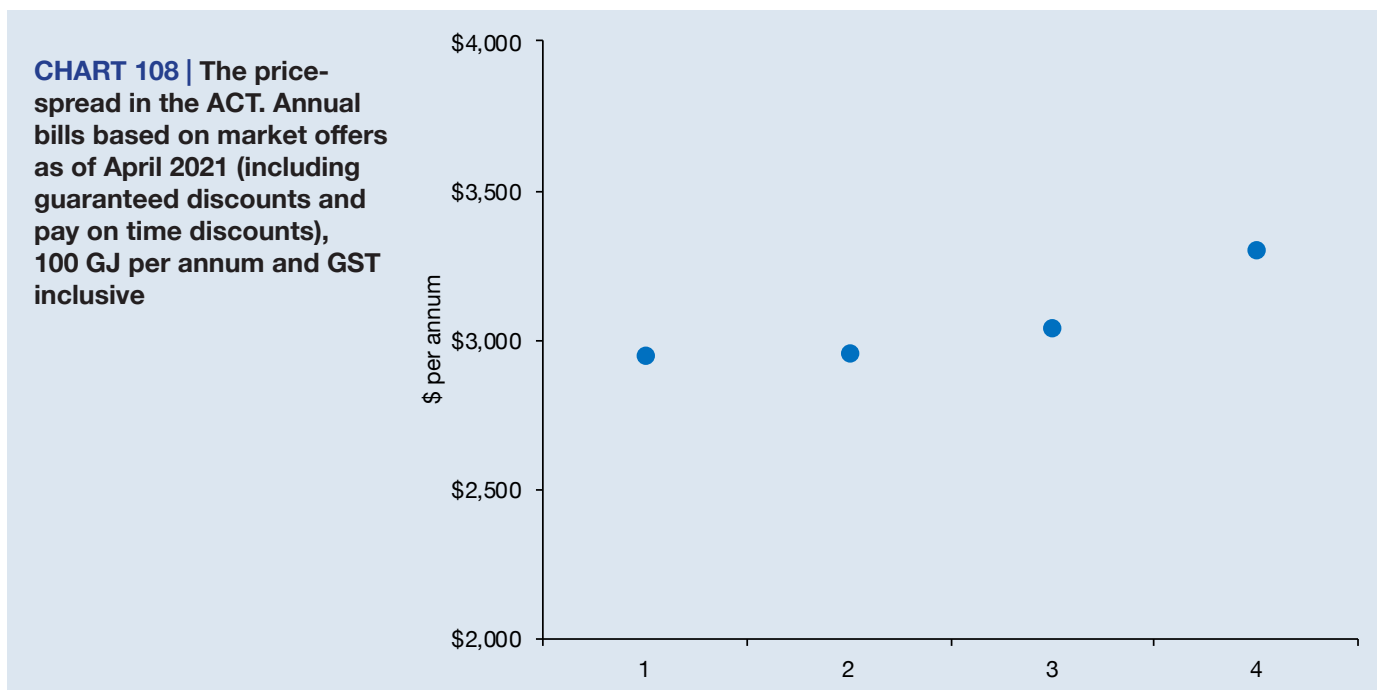


4.6.2 ACT gas bills April 2021

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

The price-spread

The typical annual market offer bill for SMEs consuming 100 GJ per annum is \$3,060 (including discounts). Chart 108 shows annual bills for four retailers in the ACT and that the maximum price-spread is approximately \$460 per annum.¹¹³ Compared to six months ago (October 2020), the maximum price-spread has decreased by \$460.







¹¹² Based on market offer rates as of April 2021, presented as annual bills for SMEs using 20,000kWh per annum (single rate). The annual NUOS charges are based on the Evoenergy's charges for the 2020/21 financial year. The NUOS also includes fixed charges.

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

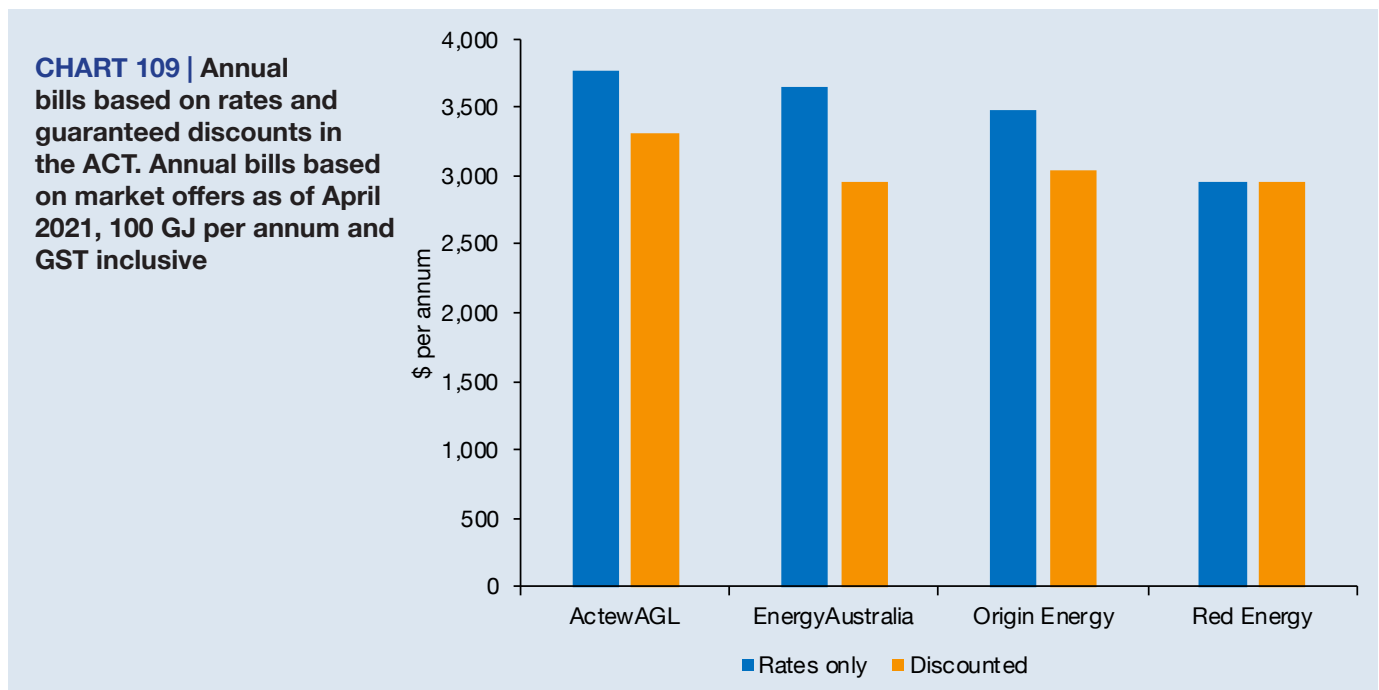
Figure 26 below ranks the retail offers from lowest to highest annual gas bills.¹¹⁴ The lowest annual retail bill has remained unchanged since October 2020.

FIGURE 26 | Lowest to highest annual gas bills (incl GST) for **market offers in the ACT** (April 2021). Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	Red Energy	\$2,950
	EnergyAustralia	\$3,954
	Origin Energy	\$3,040
	ActewAGL	\$3,301

Additional discounts

ActewAGL, Energy Australia and Origin offer guaranteed discounts off the bills while Red Energy does not offer any additional discounts.¹¹⁵ Chart 109 below shows annual bills based on their rates only and inclusive of guaranteed discounts.



4.6.3 Changes in energy bills in the ACT

This section compares annual energy bills as of April 2021 to bills as of October 2020. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to April 2021.

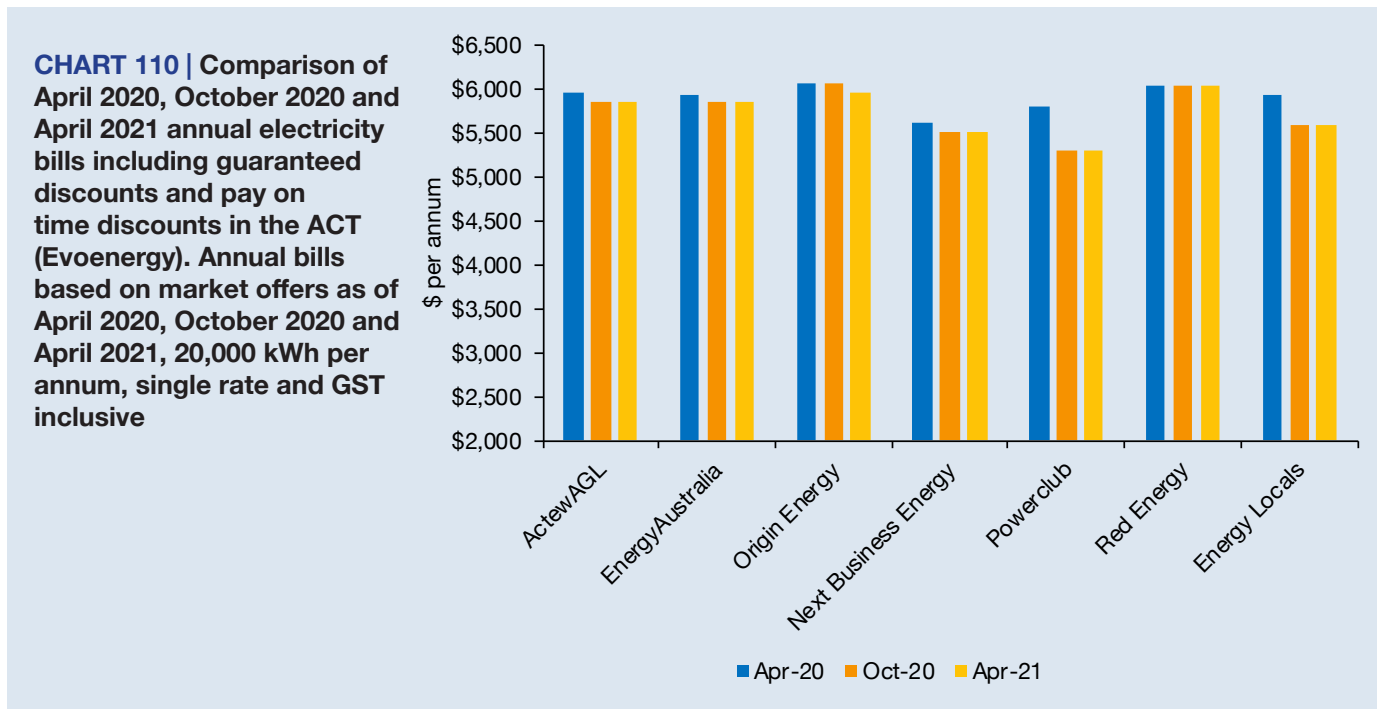
In the ACT, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months. However, retailers can still change their offers (rates, discounts or both) and they often do but there has been very little change in the ACT since October 2020.

Only one retailer, Origin Energy, has changed its electricity offer over the last six months. Origin Energy's offer produces an annual bill that is \$80 (or 1.3%) less compared to October 2020. Chart 110 below shows

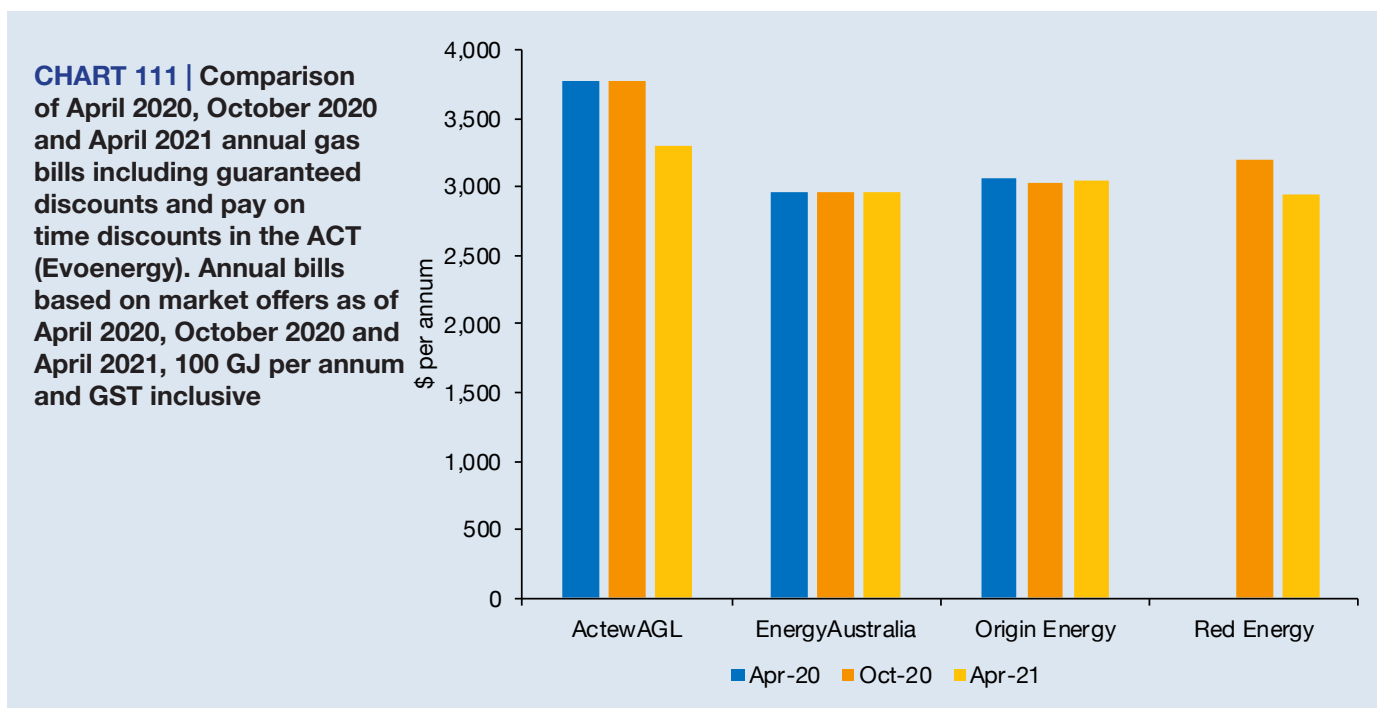
¹¹⁴ These market offers were collected in October 2020 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

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

annual electricity bills for retailers operating in the ACT as of April 2020, October 2020 and April 2021.



In relation to gas, Energy Australia’s prices have remained unchanged between October 2020 and April 2021 while Origin Energy’s prices have increased by \$20 (or 1%). Red Energy and ActewAGL’s offers, on the other hand, have decreased by 8% and 12% respectively. Chart 111 below shows annual gas bills for customers using 100 GJ per annum as of April 2020, October 2020 and April 2021.¹¹⁶



¹¹⁶ Red Energy did not have offers in April 2020 and ActewAGL’s bill reduction is due to the non-conditional discount now being available rather than any changes to their rates.

4.7 Western Australia and Northern Territory

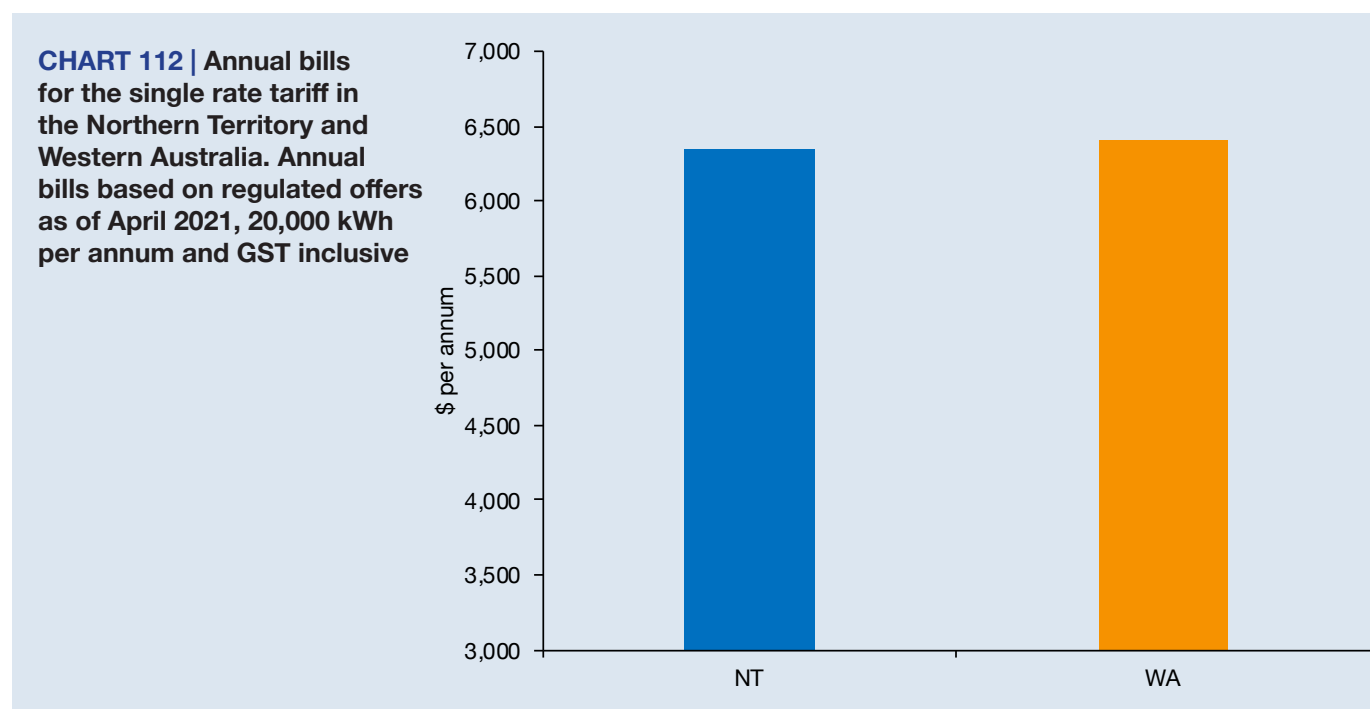
Electricity prices remain regulated in Western Australia and the Northern Territory. In Western Australia the Minister for Energy also determines a maximum price cap for gas prices.¹¹⁷

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

The bill analysis presented in this report is based on SMEs using 20,000 kWh per annum on a single rate tariff. Research published by AEMO¹¹⁸ shows that small businesses, on average (across the NEM network areas), use approximately 20,000 kWh per annum and we use this average instead of network specific consumption profiles to readily enable comparison between network areas and jurisdictions. The AEMO report does not cover WA and NT, but average consumption levels in the most comparable networks of Energex and South Australia Power Networks are 16,678 kWh/annum and 14,262 kWh/annum respectively. We also note that the workbooks accompanying this report allow users to nominate their own consumption levels as well as undertaking analysis of different tariff types (2-rate tariffs, time of use tariffs etc.). The workbooks are available at: <https://energyconsumersaustralia.com.au/publications/our-research>.

4.7.1 Western Australia and Northern Territory electricity bills April 2021

SMEs using 20,000 kWh per annum (single rate) in the Northern Territory will have an annual bill of \$6,355 while Western Australian businesses will have a bill of around \$6,415.



4.7.2 Western Australian gas bills April 2021

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

¹¹⁷ There are no reticulated gas offers for small business customers in the Northern Territory.

¹¹⁸ Jacobs Australia, Retail electricity price history and project trends, AEMO, 21 September 2017

Chart 113 below shows annual bills for gas customers in the South West (Perth region). While all three retailers have the same base rates for gas consumption, the daily supply charge and additional discounts vary.¹¹⁹ Alinta does not offer an additional discount while AGL and Origin offer 45% and 32% off usage charges during the benefit period. A small business on Alinta's offer can save approximately \$1,730 per annum by switching to AGL's offer.

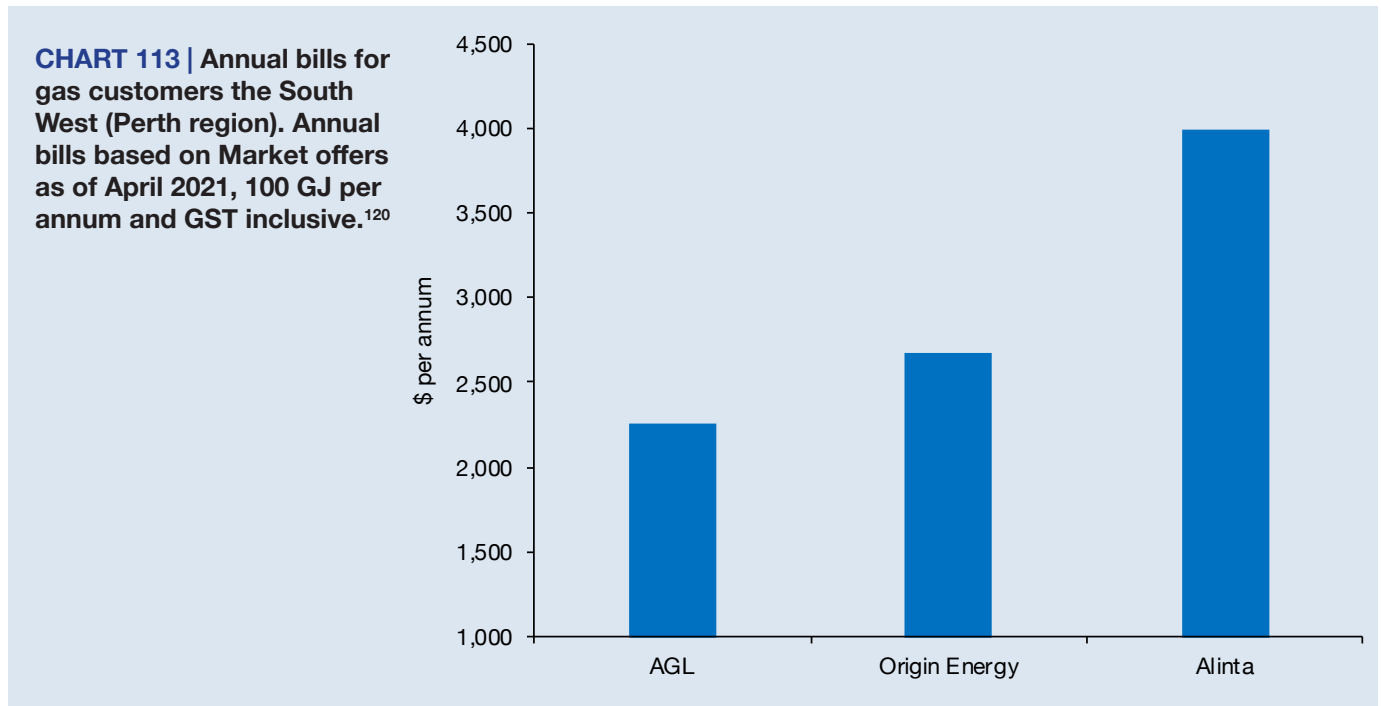


Figure 27 below ranks the retail offers from lowest to highest annual gas bills.¹²¹

FIGURE 27 | Lowest to highest annual gas bills (incl GST) for **market offers in Western Australia, April 2021.** Bills including guaranteed discounts and pay on time discounts - SMEs consuming 100 GJ per annum

	AGL	\$2,256
	Origin Energy	\$2,680
	Alinta Energy	\$3,987

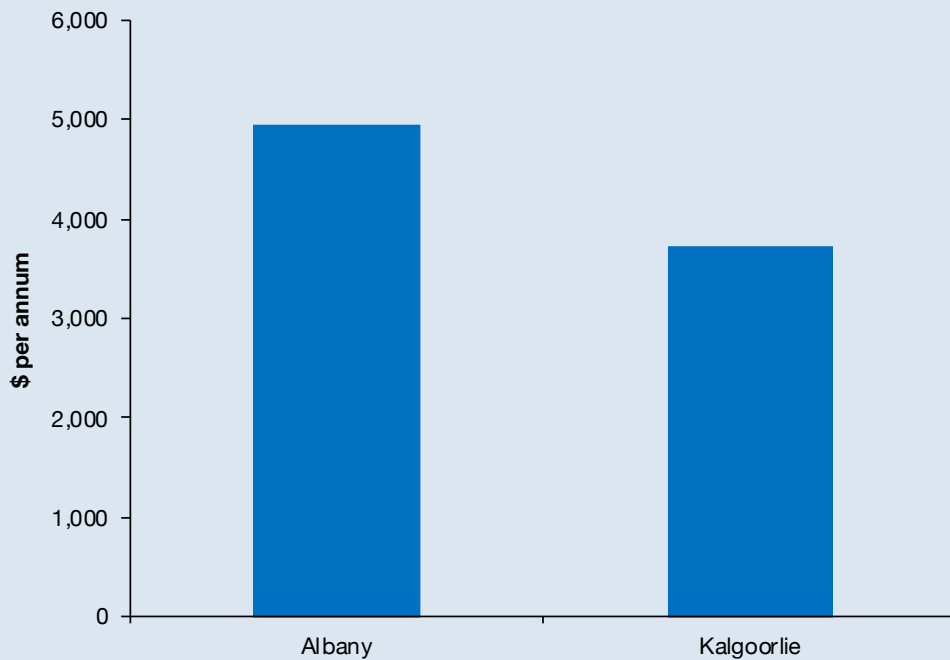
Alinta also offers gas retail contracts to SMEs in the Albany and Kalgoorlie pricing zones. Chart 114 below shows that the annual bill for a small business using 100 GJ per annum in Albany will pay approximately \$4,955 per annum and customers in Kalgoorlie will pay around \$3,735.

¹¹⁹ Western Australia uses a unit price for gas and 1 unit equals 3.6 MJ. All bill analysis for WA in this report has converted the unit price to the price per MJ. Kleenheat also offers gas contracts to small businesses in WA but as they do not post their business rates on their website (requesting a quote is necessary), we have not included Kleenheat in this analysis.

¹²⁰ Alinta Energy and AGL's supply charges are inclusive of a daily Account Administration Fee as of October 2018, April 2019, October 2019, April 2020, October 2020 and April 2021. In an earlier update (April 2018), only Alinta explicitly stated that an Account Administration Fee applies. Origin's offers in WA do not mention this fee.

¹²¹ These market offers were collected on the 15th of April 2021 and it should be noted that retailers may change their rates at any time. Additional discounts for customers choosing to pay by direct debit are not included in these bill calculations.

CHART 114 | Annual bills for gas customers in Alinta and Kargoorlie. Annual bills based on Alinta's standard tariff as of April 2021, 100 GJ per annum and GST inclusive



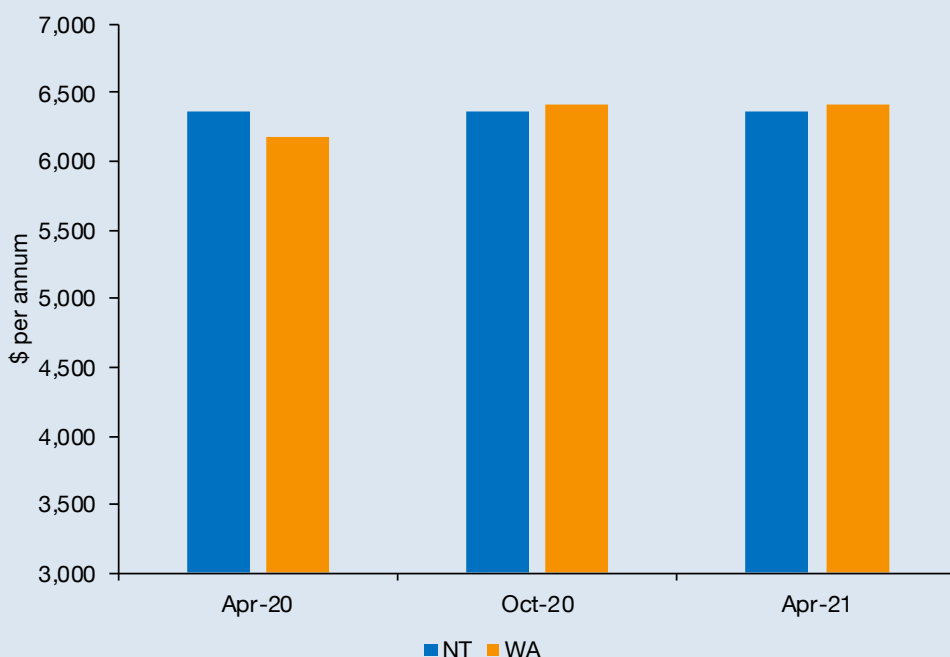
4.7.3 Changes in energy bills in WA and NT

This section compares annual energy bills as of October 2020 to annual energy bills as of April 2021. The SME Retail Tariff Tracker project collects information about energy offers and rates available to small businesses across Australia every six months (in April and October every year) and this section highlights changes (increases or decreases) to annual bills over that six month period, as well as the trend over the twelve months to October 2020.

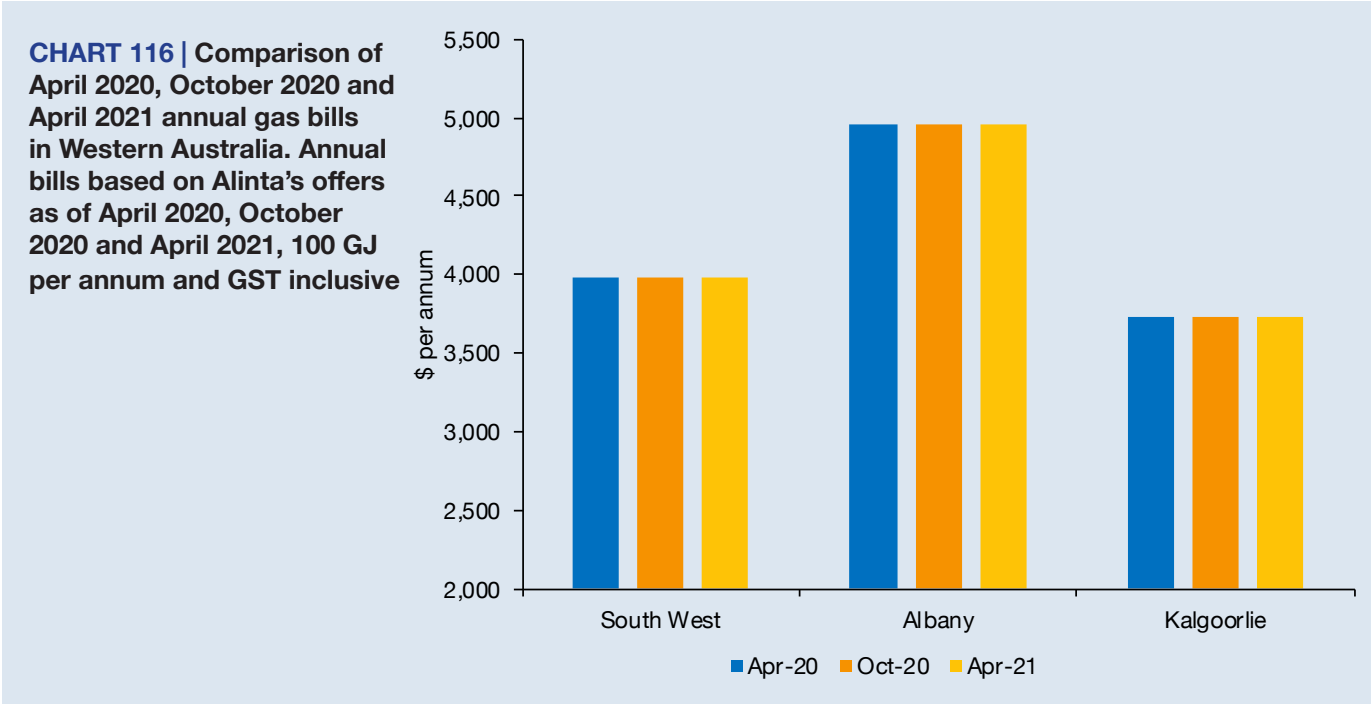
In the Northern Territory and Western Australia, electricity prices have not had an underlying price reset, such as new network tariffs taking effect, during the last six months and there have been no changes to the electricity retail offers.

Chart 115 below shows annual electricity bills for the regulated offer in the Northern Territory and Western Australia as of April 2020, October 2020 and April 2021.

CHART 115 | Annual electricity bills in the Northern Territory and Western Australia in April 2020, October 2020 and April 2021. Annual bills based on regulated offers as of April 2020, October 2020 and April 2021, 20,000 kWh per annum, single rate and GST inclusive



Alinta Energy’s gas prices have remained unchanged for one and a half year (since October 2019). Chart 116 below shows Alinta Energy’s annual gas bills in Western Australia as of April 2020, October 2020 and April 2021.¹²²



¹²² This is based on Alinta Energy’s offers only.

Appendix A - List of energy offers used in the analysis

Electricity offers for April 2021 bill analysis:

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Ausgrid	Single	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	Single	CovaU	Freedom Plus	30	0	0	0
NSW	Ausgrid	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Ausgrid	Single	EnergyAustralia	Total Plan	21	0	0	0
NSW	Ausgrid	Single	Next Business Energy	Assured	0	0	0	0
NSW	Ausgrid	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	Single	Origin Energy	Flexi	0	14	0	0
NSW	Ausgrid	Single	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Ausgrid	Single	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Ausgrid	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Ausgrid	Single	Simply Energy	Business Saver	21	0	0	0
NSW	Ausgrid	Single	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	Single	1st Energy	1st Saver Plus	15	0	10	0
NSW	Ausgrid	Single	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Ausgrid	Single	Blue NRG	Blue Saver	0	0	0	0
NSW	Ausgrid	Single	Powerclub	Bis Flat	0	0	0	0
NSW	Ausgrid	Single	Future X Power	Business Smart	0	0	0	0
NSW	Ausgrid	Single	Tango Energy	Business Select	0	0	0	0
NSW	Ausgrid	Single	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Ausgrid	Single	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Ausgrid	Single	Discover Energy	Business Smart Saver	0	23	0	0
NSW	Ausgrid	Single	Electricity in a Box	Biz Anytime	0	0	0	0
NSW	Ausgrid	Single	Glow Power	Saver	0	0	0	0
NSW	Ausgrid	Single	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Ausgrid	Single	QEnergy	Biz your Way	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Ausgrid	Single	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Ausgrid	Single	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Ausgrid	Single	Sumo Power	Business Freedom	0	0	0	0
NSW	Ausgrid	Single	Arc Energy Group	Business	0	0	0	22
NSW	Ausgrid	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	Controlled	CovaU	Freedom Plus	30	0	0	0
NSW	Ausgrid	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Ausgrid	Controlled	EnergyAustralia	Total Plan	21	0	0	0
NSW	Ausgrid	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	Controlled	Origin Energy	Flexi	0	14	0	0
NSW	Ausgrid	Controlled	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Ausgrid	Controlled	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Ausgrid	Controlled	Red Energy	Red Business Saver	0	0	0	0
NSW	Ausgrid	Controlled	Simply Energy	Business Saver	21	0	0	0
NSW	Ausgrid	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	Controlled	1st Energy	1st Saver Plus	15	0	10	0
NSW	Ausgrid	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Ausgrid	Controlled	Blue NRG	Blue Saver	0	0	0	0
NSW	Ausgrid	Controlled	Future X Power	Business Smart	0	0	0	0
NSW	Ausgrid	Controlled	Tango Energy	Business Select	0	0	0	0
NSW	Ausgrid	Controlled	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Ausgrid	Controlled	Discover Energy	Business Smart Saver	0	23	0	0
NSW	Ausgrid	Controlled	Glow Power	Saver	0	0	0	0
NSW	Ausgrid	Controlled	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Ausgrid	Controlled	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Ausgrid	Controlled	Sumo Power	Business Freedom	0	0	0	0
NSW	Ausgrid	Controlled	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Ausgrid	TOU	AGL	Business Essentials	0	0	0	0
NSW	Ausgrid	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Ausgrid	TOU	EnergyAustralia	Total Plan	21	0	0	0
NSW	Ausgrid	TOU	Next Business Energy	Assured	0	0	0	0
NSW	Ausgrid	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Ausgrid	TOU	Origin Energy	Flexi	0	14	0	0
NSW	Ausgrid	TOU	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Ausgrid	TOU	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Ausgrid	TOU	Red Energy	Red Business Saver	0	0	0	0
NSW	Ausgrid	TOU	Simply Energy	Business Saver	21	0	0	0
NSW	Ausgrid	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Ausgrid	TOU	1st Energy	1st Saver Plus	15	0	10	0
NSW	Ausgrid	TOU	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Ausgrid	TOU	Blue NRG	Blue Saver	0	0	0	0
NSW	Ausgrid	TOU	Tango Energy	Business Select	0	0	0	0
NSW	Ausgrid	TOU	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Ausgrid	TOU	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Ausgrid	TOU	Discover Energy	Business Smart Saver	0	23	0	0
NSW	Ausgrid	TOU	Glow Power	Saver	0	0	0	0
NSW	Ausgrid	TOU	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Ausgrid	TOU	QEnergy	Biz your Way	0	0	0	0
NSW	Ausgrid	TOU	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Ausgrid	TOU	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Ausgrid	TOU	Sumo Power	Business Freedom	0	0	0	0
NSW	Ausgrid	TOU	Arc Energy Group	Business	0	0	0	22
NSW	Endeavour	Single	AGL	Business Essentials	0	0	0	0
NSW	Endeavour	Single	CovaU	Freedom Plus	30	0	0	0
NSW	Endeavour	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	Single	EnergyAustralia	Total Plan	13	0	0	0
NSW	Endeavour	Single	Next Business Energy	Assured	0	0	0	0
NSW	Endeavour	Single	Momentum Energy	SmilePower Flexi	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Endeavour	Single	Origin Energy	Flexi	0	14	0	0
NSW	Endeavour	Single	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Endeavour	Single	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Endeavour	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	Single	Simply Energy	Business Saver	21	0	0	0
NSW	Endeavour	Single	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	Single	1st Energy	1st Saver	5	0	10	0
NSW	Endeavour	Single	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Endeavour	Single	Blue NRG	Blue Saver	0	0	0	0
NSW	Endeavour	Single	Powerclub	Bis Flat	0	0	0	0
NSW	Endeavour	Single	Future X Power	Business Smart	0	0	0	0
NSW	Endeavour	Single	Tango Energy	Business Select	0	0	0	0
NSW	Endeavour	Single	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Endeavour	Single	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Endeavour	Single	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Endeavour	Single	Glow Power	Saver	0	0	0	0
NSW	Endeavour	Single	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Endeavour	Single	QEnergy	Biz your Way	0	0	0	0
NSW	Endeavour	Single	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Endeavour	Single	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Endeavour	Single	Sumo Power	Business Freedom	0	0	0	0
NSW	Endeavour	Single	Arc Energy Group	Business	0	0	0	13
NSW	Endeavour	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Endeavour	Controlled	CovaU	Freedom Plus	30	0	0	0
NSW	Endeavour	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	Controlled	EnergyAustralia	Total Plan	13	0	0	0
NSW	Endeavour	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Endeavour	Controlled	Origin Energy	Flexi	0	14	0	0
NSW	Endeavour	Controlled	Powerdirect	Business Rate Saver	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Endeavour	Controlled	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Endeavour	Controlled	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	Controlled	Simply Energy	Business Saver	21	0	0	0
NSW	Endeavour	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	Controlled	1st Energy	1st Saver	5	0	10	0
NSW	Endeavour	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Endeavour	Controlled	Blue NRG	Blue Saver	0	0	0	0
NSW	Endeavour	Controlled	Future X Power	Business Smart	0	0	0	0
NSW	Endeavour	Controlled	Tango Energy	Business Select	0	0	0	0
NSW	Endeavour	Controlled	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Endeavour	Controlled	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Endeavour	Controlled	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Endeavour	Controlled	Glow Power	Saver	0	0	0	0
NSW	Endeavour	Controlled	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Endeavour	Controlled	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Endeavour	Controlled	Sumo Power	Business Freedom	0	0	0	0
NSW	Endeavour	TOU	AGL	Business Essentials	0	0	0	0
NSW	Endeavour	TOU	CovaU	Freedom Plus	30	0	0	0
NSW	Endeavour	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Endeavour	TOU	EnergyAustralia	Total Plan	13	0	0	0
NSW	Endeavour	TOU	Next Business Energy	Assured	0	0	0	0
NSW	Endeavour	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Endeavour	TOU	Origin Energy	Flexi	0	14	0	0
NSW	Endeavour	TOU	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Endeavour	TOU	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Endeavour	TOU	Red Energy	Red Business Saver	0	0	0	0
NSW	Endeavour	TOU	Simply Energy	Business Saver	21	0	0	0
NSW	Endeavour	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Endeavour	TOU	1st Energy	1st Saver	5	0	10	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Endeavour	TOU	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Endeavour	TOU	Blue NRG	Blue Saver	0	0	0	0
NSW	Endeavour	TOU	Tango Energy	Business Select	0	0	0	0
NSW	Endeavour	TOU	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Endeavour	TOU	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Endeavour	TOU	Glow Power	Saver	0	0	0	0
NSW	Endeavour	TOU	QEnergy	Biz your Way	0	0	0	0
NSW	Endeavour	TOU	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Endeavour	TOU	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Endeavour	TOU	Sumo Power	Business Freedom	0	0	0	0
NSW	Endeavour	TOU	Arc Energy Group	Business	0	0	0	13
NSW	Essential Energy	Single	AGL	Business Essentials	0	0	0	0
NSW	Essential Energy	Single	CovaU	Freedom Plus	30	0	0	0
NSW	Essential Energy	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	Single	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	Single	Next Business Energy	Assured	0	0	0	0
NSW	Essential Energy	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Essential Energy	Single	Origin Energy	Flexi	0	14	0	0
NSW	Essential Energy	Single	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Essential Energy	Single	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Essential Energy	Single	Red Energy	Red Business Saver	0	0	0	0
NSW	Essential Energy	Single	Simply Energy	Business Saver	21	0	0	0
NSW	Essential Energy	Single	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	Single	1st Energy	1st Saver Plus	10	0	10	0
NSW	Essential Energy	Single	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Essential Energy	Single	Powerclub	Bis Flat	0	0	0	0
NSW	Essential Energy	Single	Future X Power	Business Smart	0	0	0	0
NSW	Essential Energy	Single	Tango Energy	Business Select	0	0	0	0
NSW	Essential Energy	Single	Enova Energy	Business Economy Plus	0	0	0	3

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Essential Energy	Single	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Essential Energy	Single	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Essential Energy	Single	Glow Power	Saver	0	0	0	0
NSW	Essential Energy	Single	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Essential Energy	Single	QEnergy	Biz your Way	0	0	0	0
NSW	Essential Energy	Single	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Essential Energy	Single	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Essential Energy	Controlled	AGL	Business Essentials	0	0	0	0
NSW	Essential Energy	Controlled	CovaU	Freedom Plus	30	0	0	0
NSW	Essential Energy	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	Controlled	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
NSW	Essential Energy	Controlled	Origin Energy	Flexi	0	14	0	0
NSW	Essential Energy	Controlled	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Essential Energy	Controlled	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Essential Energy	Controlled	Red Energy	Red Business Saver	0	0	0	0
NSW	Essential Energy	Controlled	Simply Energy	Business Saver	21	0	0	0
NSW	Essential Energy	Controlled	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	Controlled	1st Energy	1st Saver Plus	10	0	10	0
NSW	Essential Energy	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Essential Energy	Controlled	Future X Power	Business Smart	0	0	0	0
NSW	Essential Energy	Controlled	Tango Energy	Business Select	0	0	0	0
NSW	Essential Energy	Controlled	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Essential Energy	Controlled	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Essential Energy	Controlled	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Essential Energy	Controlled	Glow Power	Saver	0	0	0	0
NSW	Essential Energy	Controlled	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Essential Energy	Controlled	ReAmped Energy	ReAmped Business	0	0	0	0
NSW	Essential Energy	TOU	AGL	Business Essentials	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
NSW	Essential Energy	TOU	CovaU	Freedom Plus	0	30	0	0
NSW	Essential Energy	TOU	Diamond Energy	Renewable Saver POT	0	0	7	0
NSW	Essential Energy	TOU	EnergyAustralia	Total Plan	18	0	0	0
NSW	Essential Energy	TOU	Next Business Energy	Assured	0	0	0	0
NSW	Essential Energy	TOU	Origin Energy	Flexi	0	14	0	0
NSW	Essential Energy	TOU	Powerdirect	Business Rate Saver	0	0	0	0
NSW	Essential Energy	TOU	Powershop	Shopper with Mega Pack	0	0	6	0
NSW	Essential Energy	TOU	Red Energy	Red Business Saver	0	0	0	0
NSW	Essential Energy	TOU	Simply Energy	Business Saver	21	0	0	0
NSW	Essential Energy	TOU	Energy Locals	Business Member	0	0	0	0
NSW	Essential Energy	TOU	1st Energy	1st Saver Plus	10	0	10	0
NSW	Essential Energy	TOU	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Essential Energy	TOU	Tango Energy	Business Select	0	0	0	0
NSW	Essential Energy	TOU	Enova Energy	Business Economy Plus	0	0	0	3
NSW	Essential Energy	TOU	Bright Spark Power	Business 12 Months	0	0	0	0
NSW	Essential Energy	TOU	Discover Energy	Business Smart Saver	0	18	0	0
NSW	Essential Energy	TOU	Glow Power	Saver	0	0	0	0
NSW	Essential Energy	TOU	Locality Planning Energy	Principal Offer	0	0	0	0
NSW	Essential Energy	TOU	Radian Energy	GTG Business Anytime	0	0	0	0
NSW	Essential Energy	TOU	ReAmped Energy	ReAmped Business	0	0	0	0
VIC	CitiPower	Single	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	Single	Alinta Energy	BusinessDeal	0	0	0	0
VIC	CitiPower	Single	CovaU	Super Saver	0	30	0	0
VIC	CitiPower	Single	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	CitiPower	Single	EnergyAustralia	Total Plan	5	0	0	0
VIC	CitiPower	Single	GloBird Energy	Biz VicSave	0	0	0	0
VIC	CitiPower	Single	Lumo Energy	Value	0	0	0	0
VIC	CitiPower	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	Single	Next Business Energy	Market offer	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	CitiPower	Single	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Single	1st Energy	1st Saver Plus	0	7	0	3
VIC	CitiPower	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Single	Powershop	Carbon Neutral	0	0	0	0
VIC	CitiPower	Single	Red Energy	Red Business Saver	0	0	0	0
VIC	CitiPower	Single	Simply Energy	Business Saver	10	0	0	0
VIC	CitiPower	Single	Sumo Power	Freedom	0	0	0	0
VIC	CitiPower	Single	Blue NRG	Blue Business Expert	0	0	0	0
VIC	CitiPower	Single	Tango Energy	Business Select	0	0	0	0
VIC	CitiPower	Single	Powerclub	Bis Flat	0	0	0	0
VIC	CitiPower	Single	Energy Locals	Business Saver	0	0	0	0
VIC	CitiPower	Single	Q Energy	Mini Me Biz	0	0	0	0
VIC	CitiPower	Single	Available from all retailers	VDO	0	0	0	0
VIC	CitiPower	Controlled	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
VIC	CitiPower	Controlled	CovaU	Super Saver	0	30	0	0
VIC	CitiPower	Controlled	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	CitiPower	Controlled	EnergyAustralia	Total Plan	5	0	0	0
VIC	CitiPower	Controlled	GloBird Energy	Biz VicSave	0	0	0	0
VIC	CitiPower	Controlled	Lumo Energy	Value	0	0	0	0
VIC	CitiPower	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	Controlled	Next Business Energy	Market offer	0	0	0	0
VIC	CitiPower	Controlled	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Controlled	1st Energy	1st Saver Plus	0	7	0	3
VIC	CitiPower	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Controlled	Powershop	Carbon Neutral	0	0	0	0
VIC	CitiPower	Controlled	Red Energy	Red Business Saver	0	0	0	0
VIC	CitiPower	Controlled	Simply Energy	Business Saver	10	0	0	0
VIC	CitiPower	Controlled	Sumo Power	Freedom	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	CitiPower	Controlled	Energy Locals	Business Saver	0	0	0	0
VIC	CitiPower	Controlled	Q Energy	Mini Me Biz	0	0	0	0
VIC	CitiPower	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
VIC	CitiPower	Two Rate	CovaU	Super Saver	0	30	0	0
VIC	CitiPower	Two Rate	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	CitiPower	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
VIC	CitiPower	Two Rate	GloBird Energy	Biz VicSave	0	0	0	0
VIC	CitiPower	Two Rate	Lumo Energy	Value	0	0	0	0
VIC	CitiPower	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	Two Rate	Next Business Energy	Market offer	0	0	0	0
VIC	CitiPower	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	CitiPower	Two Rate	1st Energy	1st Saver Plus	0	7	0	3
VIC	CitiPower	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	CitiPower	Two Rate	Powershop	Carbon Neutral	0	0	0	0
VIC	CitiPower	Two Rate	Red Energy	Red Business Saver	0	0	0	0
VIC	CitiPower	Two Rate	Simply Energy	Business Saver	10	0	0	0
VIC	CitiPower	Two Rate	Sumo Power	Freedom	0	0	0	0
VIC	CitiPower	Two Rate	Blue NRG	Blue Business Expert	0	0	0	0
VIC	CitiPower	Two Rate	Powerclub	Bis Flex	0	0	0	0
VIC	CitiPower	Two Rate	Energy Locals	Business Saver	0	0	0	0
VIC	CitiPower	Two Rate	Q Energy	Mini Me Biz	0	0	0	0
VIC	CitiPower	TOU	Alinta Energy	BusinessDeal	0	0	0	0
VIC	CitiPower	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	CitiPower	TOU	Red Energy	Red Business Saver	0	0	0	0
VIC	CitiPower	TOU	Blue NRG	Blue Business Expert	0	0	0	0
VIC	CitiPower	TOU	AGL	Business Essentials	0	0	0	0
VIC	CitiPower	TOU	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	CitiPower	TOU	Lumo Energy	Value	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	CitiPower	TOU	Energy Locals	Business Saver	0	0	0	0
VIC	Powercor	Single	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Single	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Powercor	Single	CovaU	Super Saver	0	30	0	0
VIC	Powercor	Single	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	Powercor	Single	EnergyAustralia	Total Plan	5	0	0	0
VIC	Powercor	Single	GloBird Energy	Biz VicSave	0	0	0	0
VIC	Powercor	Single	Lumo Energy	Value	0	0	0	0
VIC	Powercor	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Single	Next Business Energy	Market offer	0	0	0	0
VIC	Powercor	Single	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Single	1st Energy	1st Saver Plus	0	7	0	3
VIC	Powercor	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Single	Powershop	Carbon Neutral	0	0	0	0
VIC	Powercor	Single	Red Energy	Red Business Saver	0	0	0	0
VIC	Powercor	Single	Simply Energy	Business Saver	10	0	0	0
VIC	Powercor	Single	Sumo Power	Freedom	0	0	0	0
VIC	Powercor	Single	Blue NRG	Blue Business Expert	0	0	0	0
VIC	Powercor	Single	Tango Energy	Business Select	0	0	0	0
VIC	Powercor	Single	Powerclub	Bis Flat	0	0	0	0
VIC	Powercor	Single	Energy Locals	Business Saver	0	0	0	0
VIC	Powercor	Single	Q Energy	Mini Me Biz	0	0	0	0
VIC	Powercor	Single	Available from all retailers	VDO	0	0	0	0
VIC	Powercor	Controlled	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Powercor	Controlled	CovaU	Super Saver	0	30	0	0
VIC	Powercor	Controlled	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	Powercor	Controlled	EnergyAustralia	Total Plan	5	0	0	0
VIC	Powercor	Controlled	GloBird Energy	Biz VicSave	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	Powercor	Controlled	Lumo Energy	Value	0	0	0	0
VIC	Powercor	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Controlled	Next Business Energy	Market offer	0	0	0	0
VIC	Powercor	Controlled	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Controlled	1st Energy	1st Saver Plus	0	7	0	3
VIC	Powercor	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Controlled	Powershop	Carbon Neutral	0	0	0	0
VIC	Powercor	Controlled	Red Energy	Red Business Saver	0	0	0	0
VIC	Powercor	Controlled	Simply Energy	Business Saver	10	0	0	0
VIC	Powercor	Controlled	Sumo Power	Freedom	0	0	0	0
VIC	Powercor	Controlled	Energy Locals	Business Saver	0	0	0	0
VIC	Powercor	Controlled	Q Energy	Mini Me Biz	0	0	0	0
VIC	Powercor	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	Powercor	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Powercor	Two Rate	CovaU	Super Saver	0	30	0	0
VIC	Powercor	Two Rate	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	Powercor	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
VIC	Powercor	Two Rate	GloBird Energy	Biz VicSave	0	0	0	0
VIC	Powercor	Two Rate	Lumo Energy	Value	0	0	0	0
VIC	Powercor	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	Two Rate	Next Business Energy	Market offer	0	0	0	0
VIC	Powercor	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	Powercor	Two Rate	1st Energy	1st Saver Plus	0	7	0	3
VIC	Powercor	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	Powercor	Two Rate	Powershop	Carbon Neutral	0	0	0	0
VIC	Powercor	Two Rate	Red Energy	Red Business Saver	0	0	0	0
VIC	Powercor	Two Rate	Simply Energy	Business Saver	10	0	0	0
VIC	Powercor	Two Rate	Sumo Power	Freedom	0	0	0	0
VIC	Powercor	Two Rate	Blue NRG	Blue Business Expert	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	Powercor	Two Rate	Powerclub	Bis Flex	0	0	0	0
VIC	Powercor	Two Rate	Energy Locals	Business Saver	0	0	0	0
VIC	Powercor	Two Rate	Q Energy	Mini Me Biz	0	0	0	0
VIC	Powercor	TOU	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Powercor	TOU	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Powercor	TOU	Red Energy	Red Business Saver	0	0	0	0
VIC	Powercor	TOU	Energy Locals	Business Saver	0	0	0	0
VIC	Powercor	TOU	Blue NRG	Blue Business Expert	0	0	0	0
VIC	Powercor	TOU	AGL	Business Essentials	0	0	0	0
VIC	Powercor	TOU	CovaU	Super Saver	0	30	0	0
VIC	Powercor	TOU	Lumo Energy	Value	0	0	0	0
VIC	AusNet Services	Single	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Single	Alinta Energy	BusinessDeal	0	0	0	0
VIC	AusNet Services	Single	CovaU	Super Saver	0	30	0	0
VIC	AusNet Services	Single	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	AusNet Services	Single	EnergyAustralia	Total Plan	5	0	0	0
VIC	AusNet Services	Single	GloBird Energy	Biz VicSave	0	0	0	0
VIC	AusNet Services	Single	Lumo Energy	Value	0	0	0	0
VIC	AusNet Services	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Single	Next Business Energy	Market offer	0	0	0	0
VIC	AusNet Services	Single	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Single	1st Energy	1st Saver Plus	0	7	0	3
VIC	AusNet Services	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Single	Powershop	Carbon Neutral	0	0	0	0
VIC	AusNet Services	Single	Red Energy	Red Business Saver	0	0	0	0
VIC	AusNet Services	Single	Simply Energy	Business Saver	10	0	0	0
VIC	AusNet Services	Single	Sumo Power	Freedom	0	0	0	0
VIC	AusNet Services	Single	Blue NRG	Blue Business Expert	0	0	0	0
VIC	AusNet Services	Single	Tango Energy	Business Select	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	AusNet Services	Single	Powerclub	Bis Flat	0	0	0	0
VIC	AusNet Services	Single	Energy Locals	Business Saver	0	0	0	0
VIC	AusNet Services	Single	Q Energy	Mini Me Biz	0	0	0	0
VIC	AusNet Services	Single	Available from all retailers	VDO	0	0	0	0
VIC	AusNet Services	Controlled	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
VIC	AusNet Services	Controlled	CovaU	Super Saver	0	30	0	0
VIC	AusNet Services	Controlled	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	AusNet Services	Controlled	EnergyAustralia	Total Plan	5	0	0	0
VIC	AusNet Services	Controlled	GloBird Energy	Biz VicSave	0	0	0	0
VIC	AusNet Services	Controlled	Lumo Energy	Value	0	0	0	0
VIC	AusNet Services	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Controlled	Next Business Energy	Market offer	0	0	0	0
VIC	AusNet Services	Controlled	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Controlled	1st Energy	1st Saver Plus	0	7	0	3
VIC	AusNet Services	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Controlled	Powershop	Carbon Neutral	0	0	0	0
VIC	AusNet Services	Controlled	Red Energy	Red Business Saver	0	0	0	0
VIC	AusNet Services	Controlled	Simply Energy	Business Saver	10	0	0	0
VIC	AusNet Services	Controlled	Sumo Power	Freedom	0	0	0	0
VIC	AusNet Services	Controlled	Energy Locals	Business Saver	0	0	0	0
VIC	AusNet Services	Controlled	Q Energy	Mini Me Biz	0	0	0	0
VIC	AusNet Services	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	AusNet Services	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
VIC	AusNet Services	Two Rate	CovaU	Super Saver	0	30	0	0
VIC	AusNet Services	Two Rate	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	AusNet Services	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
VIC	AusNet Services	Two Rate	GloBird Energy	Biz VicSave	0	0	0	0
VIC	AusNet Services	Two Rate	Lumo Energy	Value	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	AusNet Services	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	AusNet Services	Two Rate	Next Business Energy	Market offer	0	0	0	0
VIC	AusNet Services	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	AusNet Services	Two Rate	1st Energy	1st Saver Plus	0	7	0	3
VIC	AusNet Services	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	AusNet Services	Two Rate	Powershop	Carbon Neutral	0	0	0	0
VIC	AusNet Services	Two Rate	Red Energy	Red Business Saver	0	0	0	0
VIC	AusNet Services	Two Rate	Sumo Power	Freedom	0	0	0	0
VIC	AusNet Services	Two Rate	Blue NRG	Blue Business Expert	0	0	0	0
VIC	AusNet Services	Two Rate	Powerclub	Bis Flex	0	0	0	0
VIC	AusNet Services	Two Rate	Energy Locals	Business Saver	0	0	0	0
VIC	AusNet Services	Two Rate	Simply Energy	Business Saver	10	0	0	0
VIC	AusNet Services	Two Rate	Q Energy	Mini Me Biz	0	0	0	0
VIC	Jemena Network	Single	AGL	Business Essentials	0	0	0	0
VIC	Jemena Network	Single	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Jemena Network	Single	CovaU	Super Saver	0	30	0	0
VIC	Jemena Network	Single	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	Jemena Network	Single	EnergyAustralia	Total Plan	5	0	0	0
VIC	Jemena Network	Single	GloBird Energy	Biz VicSave	0	0	0	0
VIC	Jemena Network	Single	Lumo Energy	Value	0	0	0	0
VIC	Jemena Network	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Jemena Network	Single	Next Business Energy	Market offer	0	0	0	0
VIC	Jemena Network	Single	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Single	1st Energy	1st Saver Plus	0	7	0	3
VIC	Jemena Network	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Single	Powershop	Carbon Neutral	0	0	0	0
VIC	Jemena Network	Single	Red Energy	Red Business Saver	0	0	0	0
VIC	Jemena Network	Single	Simply Energy	Business Saver	10	0	0	0
VIC	Jemena Network	Single	Sumo Power	Freedom	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	Jemena Network	Single	Tango Energy	Business Select	0	0	0	0
VIC	Jemena Network	Single	Powerclub	Bis Flat	0	0	0	0
VIC	Jemena Network	Single	Energy Locals	Business Saver	0	0	0	0
VIC	Jemena Network	Single	Q Energy	Mini Me Biz	0	0	0	0
VIC	Jemena Network	Single	Available from all retailers	VDO	0	0	0	0
VIC	Jemena Network	Controlled	AGL	Business Essentials	0	0	0	0
VIC	Jemena Network	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Jemena Network	Controlled	CovaU	Super Saver	0	30	0	0
VIC	Jemena Network	Controlled	EnergyAustralia	Total Plan	5	0	0	0
VIC	Jemena Network	Controlled	GloBird Energy	Biz VicSave	0	0	0	0
VIC	Jemena Network	Controlled	Lumo Energy	Value	0	0	0	0
VIC	Jemena Network	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	Jemena Network	Controlled	Next Business Energy	Market offer	0	0	0	0
VIC	Jemena Network	Controlled	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Controlled	1st Energy	1st Saver Plus	0	7	0	3
VIC	Jemena Network	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Controlled	Powershop	Carbon Neutral	0	0	0	0
VIC	Jemena Network	Controlled	Red Energy	Red Business Saver	0	0	0	0
VIC	Jemena Network	Controlled	Simply Energy	Business Saver	10	0	0	0
VIC	Jemena Network	Controlled	Sumo Power	Freedom	0	0	0	0
VIC	Jemena Network	Controlled	Q Energy	Mini Me Biz	0	0	0	0
VIC	Jemena Network	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	Jemena Network	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
VIC	Jemena Network	Two Rate	CovaU	Super Saver	0	30	0	0
VIC	Jemena Network	Two Rate	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	Jemena Network	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
VIC	Jemena Network	Two Rate	GloBird Energy	Biz VicSave	0	0	0	0
VIC	Jemena Network	Two Rate	Lumo Energy	Value	0	0	0	0
VIC	Jemena Network	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	Jemena Network	Two Rate	Next Business Energy	Market offer	0	0	0	0
VIC	Jemena Network	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	Jemena Network	Two Rate	1st Energy	1st Saver Plus	0	7	0	3
VIC	Jemena Network	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	Jemena Network	Two Rate	Powershop	Carbon Neutral	0	0	0	0
VIC	Jemena Network	Two Rate	Red Energy	Red Business Saver	0	0	0	0
VIC	Jemena Network	Two Rate	Simply Energy	Business Saver	10	0	0	0
VIC	Jemena Network	Two Rate	Sumo Power	Freedom	0	0	0	0
VIC	Jemena Network	Two Rate	Blue NRG	Blue Business Expert	0	0	0	0
VIC	Jemena Network	Two Rate	Powerclub	Bis Flex	0	0	0	0
VIC	Jemena Network	Two Rate	Energy Locals	Business Saver	0	0	0	0
VIC	Jemena Network	Two Rate	Q Energy	Mini Me Biz	0	0	0	0
VIC	United Energy	Single	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Single	Alinta Energy	BusinessDeal	0	0	0	0
VIC	United Energy	Single	CovaU	Super Saver	0	30	0	0
VIC	United Energy	Single	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	United Energy	Single	EnergyAustralia	Total Plan	5	0	0	0
VIC	United Energy	Single	GloBird Energy	Biz VicSave	0	0	0	0
VIC	United Energy	Single	Lumo Energy	Value	0	0	0	0
VIC	United Energy	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	United Energy	Single	Next Business Energy	Market offer	0	0	0	0
VIC	United Energy	Single	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Single	1st Energy	1st Saver Plus	0	7	0	3
VIC	United Energy	Single	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Single	Powershop	Carbon Neutral	0	0	0	0
VIC	United Energy	Single	Red Energy	Red Business Saver	0	0	0	0
VIC	United Energy	Single	Simply Energy	Business Saver	10	0	0	0
VIC	United Energy	Single	Sumo Power	Freedom	0	0	0	0
VIC	United Energy	Single	Tango Energy	Business Select	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	United Energy	Single	Powerclub	Bis Flat	0	0	0	0
VIC	United Energy	Single	Energy Locals	Business Saver	0	0	0	0
VIC	United Energy	Single	Q Energy	Mini Me Biz	0	0	0	0
VIC	United Energy	Single	Available from all retailers	VDO	0	0	0	0
VIC	United Energy	Controlled	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
VIC	United Energy	Controlled	CovaU	Super Saver	0	30	0	0
VIC	United Energy	Controlled	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	United Energy	Controlled	EnergyAustralia	Total Plan	5	0	0	0
VIC	United Energy	Controlled	GloBird Energy	Biz VicSave	0	0	0	0
VIC	United Energy	Controlled	Lumo Energy	Value	0	0	0	0
VIC	United Energy	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
VIC	United Energy	Controlled	Next Business Energy	Market offer	0	0	0	0
VIC	United Energy	Controlled	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Controlled	1st Energy	1st Saver Plus	0	7	0	3
VIC	United Energy	Controlled	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Controlled	Powershop	Carbon Neutral	0	0	0	0
VIC	United Energy	Controlled	Red Energy	Red Business Saver	0	0	0	0
VIC	United Energy	Controlled	Simply Energy	Business Saver	10	0	0	0
VIC	United Energy	Controlled	Sumo Power	Freedom	0	0	0	0
VIC	United Energy	Controlled	Q Energy	Mini Me Biz	0	0	0	0
VIC	United Energy	Two Rate	AGL	Business Essentials	0	0	0	0
VIC	United Energy	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
VIC	United Energy	Two Rate	CovaU	Super Saver	0	30	0	0
VIC	United Energy	Two Rate	Diamond Energy	Renewable Saver POT	0	0	3	0
VIC	United Energy	Two Rate	EnergyAustralia	Total Plan	5	0	0	0
VIC	United Energy	Two Rate	GloBird Energy	Biz VicSave	0	0	0	0
VIC	United Energy	Two Rate	Lumo Energy	Value	0	0	0	0
VIC	United Energy	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
VIC	United Energy	Two Rate	Next Business Energy	Market offer	0	0	0	0
VIC	United Energy	Two Rate	Origin Energy	Basic	0	0	0	0
VIC	United Energy	Two Rate	1st Energy	1st Saver Plus	0	7	0	3
VIC	United Energy	Two Rate	Powerdirect	Rate Saver	0	0	0	0
VIC	United Energy	Two Rate	Powershop	Carbon Neutral	0	0	0	0
VIC	United Energy	Two Rate	Red Energy	Red Business Saver	0	0	0	0
VIC	United Energy	Two Rate	Sumo Power	Freedom	0	0	0	0
VIC	United Energy	Two Rate	Blue NRG	Blue Business Expert	0	0	0	0
VIC	United Energy	Two Rate	Simply Energy	Business Saver	10	0	0	0
VIC	United Energy	Two Rate	Powerclub	Bis Flex	0	0	0	0
VIC	United Energy	Two Rate	Energy Locals	Business Saver	0	0	0	0
VIC	United Energy	Two Rate	Q Energy	Mini Me Biz	0	0	0	0
QLD	Energex	Single	AGL	Business Essentials	0	0	0	0
QLD	Energex	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Single	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Single	Origin Energy	Flexi	0	13	0	0
QLD	Energex	Single	Powerdirect	Business Rate Saver	0	0	0	0
QLD	Energex	Single	Powershop	Shopper with Mega Pack	0	0	6	0
QLD	Energex	Single	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Single	Simply Energy	Business Saver	18	0	0	0
QLD	Energex	Single	Alinta Energy	BusinessDeal	0	0	0	0
QLD	Energex	Single	1st Energy	1st Saver Plus	5	0	10	0
QLD	Energex	Single	Powerclub	Bis Flat	0	0	0	0
QLD	Energex	Single	Next Business Energy	Assured	0	0	0	0
QLD	Energex	Single	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Single	Blue NRG	Blue Saver	0	0	0	0
QLD	Energex	Single	Future X Power	Business Smart	0	0	0	0
QLD	Energex	Single	Locality Planning Energy	Business Advantage	0	0	0	0
QLD	Energex	Single	Bright Spark Power	Business 12 Months	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
QLD	Energex	Single	CovaU	Freedom Plus	15	0	0	0
QLD	Energex	Single	Discover Energy	Business Smart Saver	0	18	0	0
QLD	Energex	Single	Glow Power	Saver	0	0	0	0
QLD	Energex	Single	Radian Energy	GTG Business Anytime	0	0	0	0
QLD	Energex	Single	ReAmped Energy	ReAmped Business	0	0	0	0
QLD	Energex	Single	Sumo Power	Freedom Business	0	0	0	0
QLD	Energex	Single	Enova Energy	Economy Plus	0	0	0	3
QLD	Energex	Single	Momentum Energy	Smile Power	0	0	0	0
QLD	Energex	Single	Electricity in a box	Business Anytime	0	0	0	0
QLD	Energex	Controlled	AGL	Business Essentials	0	0	0	0
QLD	Energex	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Controlled	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Controlled	Origin Energy	Flexi	0	13	0	0
QLD	Energex	Controlled	Powerdirect	Business Rate Saver	0	0	0	0
QLD	Energex	Controlled	Powershop	Shopper with Mega Pack	0	0	6	0
QLD	Energex	Controlled	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Controlled	Simply Energy	Business Saver	18	0	0	0
QLD	Energex	Controlled	Alinta Energy	BusinessDeal	0	0	0	0
QLD	Energex	Controlled	1st Energy	1st Saver Plus	5	0	10	0
QLD	Energex	Controlled	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Controlled	Future X Power	Business Smart	0	0	0	0
QLD	Energex	Controlled	Locality Planning Energy	Business Advantage	0	0	0	0
QLD	Energex	Controlled	Bright Spark Power	Business 12 Months	0	0	0	0
QLD	Energex	Controlled	CovaU	Freedom Plus	15	0	0	0
QLD	Energex	Controlled	Discover Energy	Business Smart Saver	0	18	0	0
QLD	Energex	Controlled	Glow Power	Saver	0	0	0	0
QLD	Energex	Controlled	ReAmped Energy	Reamped Business	0	0	0	0
QLD	Energex	Controlled	Sumo Power	Freedom Business	0	0	0	0
QLD	Energex	Controlled	Momentum Energy	Smile Power	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
QLD	Energex	Two Rate	AGL	Business Essentials	0	0	0	0
QLD	Energex	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
QLD	Energex	Two Rate	EnergyAustralia	Total Plan	13	0	0	0
QLD	Energex	Two Rate	Origin Energy	Flexi	0	13	0	0
QLD	Energex	Two Rate	Powerdirect	Business Rate Saver	0	0	0	0
QLD	Energex	Two Rate	Powershop	Shopper with Mega Pack	0	0	6	0
QLD	Energex	Two Rate	Energy Locals	Business Member	0	0	0	0
QLD	Energex	Two Rate	Simply Energy	Business Saver	18	0	0	0
QLD	Energex	Two Rate	Alinta Energy	BusinessDeal	0	0	0	0
QLD	Energex	Two Rate	1st Energy	1st Saver Plus	5	0	10	0
QLD	Energex	Two Rate	Next Business Energy	Assured	0	0	0	0
QLD	Energex	Two Rate	Red Energy	Red Business Saver	0	0	0	0
QLD	Energex	Two Rate	Blue NRG	Blue Saver	0	0	0	0
QLD	Energex	Two Rate	Locality Planning Energy	Business Plus	0	0	0	0
QLD	Energex	Two Rate	CovaU	Freedom Plus	15	0	0	0
QLD	Energex	Two Rate	Discover Energy	Business Smart Saver	0	13	0	0
QLD	Energex	Two Rate	Glow Power	Saver	0	0	0	0
QLD	Energex	Two Rate	ReAmped Energy	Reamped Business	0	0	0	0
QLD	Energex	Two Rate	Sumo Power	Freedom Business	0	0	0	0
QLD	Energex	Two Rate	Future X Power	Business Smart	0	0	0	0
QLD	Energex	Two Rate	Momentum Energy	Smile Power	0	0	0	0
QLD	Ergon	Single	Ergon Energy	Regulated	0	0	0	0
QLD	Ergon	Controlled	Ergon Energy	Regulated	0	0	0	0
QLD	Ergon	TOU	Ergon Energy	Regulated	0	0	0	0
SA	SA Power Networks	Single	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Single	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Single	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Single	EnergyAustralia	Total Plan	3	0	0	0
SA	SA Power Networks	Single	Lumo Energy	Basic	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
SA	SA Power Networks	Single	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Single	Origin Energy	Flexi	0	15	0	0
SA	SA Power Networks	Single	Powerdirect	Business Rate Saver	0	0	0	0
SA	SA Power Networks	Single	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Single	Simply Energy	Business Saver	11	0	0	0
SA	SA Power Networks	Single	Blue NRG	Blue Saver	0	0	0	0
SA	SA Power Networks	Single	Powershop	Shopper with Mega Pack	0	0	6	0
SA	SA Power Networks	Single	Powerclub	Bis Flat	0	0	0	0
SA	SA Power Networks	Single	Energy Locals	Business Member	0	0	0	0
SA	SA Power Networks	Single	Future X Power	Business Smart	0	0	0	0
SA	SA Power Networks	Single	Discover Energy	Business Smart Saver	0	15	0	0
SA	SA Power Networks	Single	Next Business Energy	Assured	0	0	0	0
SA	SA Power Networks	Single	QEnergy	Biz your Way	0	0	0	0
SA	SA Power Networks	Single	ReAmped Energy	ReAmped Business	0	0	0	0
SA	SA Power Networks	Single	Covau	Freedom Plus	0	5	0	0
SA	SA Power Networks	Single	1st Energy	1st Saver Plus	4	0	10	0
SA	SA Power Networks	Controlled	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Controlled	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Controlled	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Controlled	EnergyAustralia	Total Plan	3	0	0	0
SA	SA Power Networks	Controlled	Lumo Energy	Basic	0	0	0	0
SA	SA Power Networks	Controlled	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Controlled	Origin Energy	Flexi	0	15	0	0
SA	SA Power Networks	Controlled	Powerdirect	Business Rate Saver	0	0	0	0
SA	SA Power Networks	Controlled	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Controlled	Simply Energy	Business Saver	11	0	0	0
SA	SA Power Networks	Controlled	Powershop	Shopper with Mega Pack	0	0	6	0
SA	SA Power Networks	Controlled	Energy Locals	Business Member	0	0	0	0
SA	SA Power Networks	Controlled	Future X Power	Business Smart	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
SA	SA Power Networks	Controlled	Discover Energy	Business Smart Saver	0	15	0	0
SA	SA Power Networks	Controlled	ReAmped Energy	ReAmped Business	0	0	0	0
SA	SA Power Networks	Controlled	Covau	Freedom Plus	0	5	0	0
SA	SA Power Networks	Controlled	1st Energy	1st Saver Plus	4	0	10	0
SA	SA Power Networks	Two Rate	AGL	Business Essentials	0	0	0	0
SA	SA Power Networks	Two Rate	Alinta Energy	Business Advantage	0	0	0	0
SA	SA Power Networks	Two Rate	Diamond Energy	Renewable Saver POT	0	0	7	0
SA	SA Power Networks	Two Rate	EnergyAustralia	Total Plan	3	0	0	0
SA	SA Power Networks	Two Rate	Momentum Energy	SmilePower Flexi	0	0	0	0
SA	SA Power Networks	Two Rate	Origin Energy	Flexi	0	15	0	0
SA	SA Power Networks	Two Rate	Powerdirect	Business Rate Saver	0	0	0	0
SA	SA Power Networks	Two Rate	Red Energy	Red Business Saver	0	0	0	0
SA	SA Power Networks	Two Rate	Powershop	Shopper with Mega Pack	0	0	6	0
SA	SA Power Networks	Two Rate	Energy Locals	Business Member	0	0	0	0
SA	SA Power Networks	Two Rate	Discover Energy	Business Smart Saver	0	15	0	0
SA	SA Power Networks	Two Rate	Next Business Energy	Assured	0	0	0	0
SA	SA Power Networks	Two Rate	QEnergy	Biz your Way	0	0	0	0
SA	SA Power Networks	Two Rate	Lumo Energy	Basic	0	0	0	0
SA	SA Power Networks	Two Rate	Simply Energy	Business Saver	11	0	0	0
SA	SA Power Networks	Two Rate	ReAmped Energy	ReAmped Business	0	0	0	0
SA	SA Power Networks	Two Rate	Covau	Freedom Plus	0	5	0	0
SA	SA Power Networks	Two Rate	1st Energy	1st Saver Plus	4	0	10	0
TAS	TasNetworks	Single	Aurora Energy	Regulated	0	0	0	0
TAS	TasNetworks	Single	1st Energy	1st Saver	0	0	0	5
TAS	TasNetworks	Single	Future X Power	Business Smart	0	0	3	0
TAS	TasNetworks	Controlled	Aurora Energy	Regulated	0	0	0	0
TAS	TasNetworks	Controlled	1st Energy	1st Saver	0	0	0	5
TAS	TasNetworks	Controlled	Future X Power	Business Smart	0	0	3	0
TAS	TasNetworks	TOU	Aurora Energy	Regulated	0	0	0	0

State	DB	Meter type	Retailer	Name	Guaranteed discount on bill (%)	Guaranteed discount on usage (%)	POT discount on bill (%)	POT discount on usage (%)
TAS	TasNetworks	TOU	1st Energy	1st Saver	0	0	0	5
ACT	Evoenergy	Single	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	Single	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	Single	Origin Energy	Flexi	0	10	0	0
ACT	Evoenergy	Single	Next Business Energy	Assured	0	0	0	0
ACT	Evoenergy	Single	Powerclub	Bis Flat	0	0	0	0
ACT	Evoenergy	Single	Red Energy	Red Business Saver	0	0	0	0
ACT	Evoenergy	Single	Energy Locals	Business Member	0	0	0	0
ACT	Evoenergy	Controlled	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	Controlled	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	Controlled	Origin Energy	Flexi	0	10	0	0
ACT	Evoenergy	Controlled	Red Energy	Red Business Saver	0	0	0	0
ACT	Evoenergy	Controlled	Energy Locals	Business Member	0	0	0	0
ACT	Evoenergy	TOU	ActewAGL	Business plan	0	12	0	0
ACT	Evoenergy	TOU	EnergyAustralia	Total Plan	10	0	0	0
ACT	Evoenergy	TOU	Origin Energy	Flexi	0	10	0	0
ACT	Evoenergy	TOU	Next Business Energy	Assured	0	0	0	0
ACT	Evoenergy	TOU	Energy Locals	Business Member	0	0	0	0
WA	Horizon Power	Single	Horizon Power	Regulated	0	0	0	0
WA	Western Power	Single	Synergy	Regulated	0	0	0	0
WA	Western Power	Two Rate	Synergy	Regulated	0	0	0	0
NT	PWC	Single	Jacana Energy	Regulated	0	0	0	0
NT	PWC	Two Rate	Jacana Energy	Regulated	0	0	0	0

Gas offers for April 2021 bill analysis:

State	Pricing zone	Retailer	Name	Guaranteed discount off bill (%)	Guaranteed discount off usage (%)	POT discount off bill (%)	POT discount off usage (%)
NSW	Jemena Sydney	AGL	Business Essentials Saver	0	0	0	0
NSW	Jemena Sydney	Covau	Business Freedom Plus	25	0	0	0
NSW	Jemena Sydney	EnergyAustralia	Total Plan	17	0	0	0
NSW	Jemena Sydney	Origin Energy	Business Flexi	0	14	0	0
NSW	Jemena Sydney	Red Energy	Business Saver	0	0	0	0
NSW	Jemena Sydney	Simply Energy	Business Saver	21	0	0	0
NSW	Jemena Sydney	Alinta Energy	BusinessDeal	0	0	0	0
NSW	Jemena Sydney	Discover Energy	Budget	0	25	0	0
NSW	ActewAGL Queanbeyan	ActewAGL	Business plan	10	0	0	0
NSW	ActewAGL Queanbeyan	EnergyAustralia	Total Plan	19	0	0	0
NSW	ActewAGL Shoalhaven	ActewAGL	Standard plan	0	0	0	0
NSW	Capital Region	ActewAGL	Business plan	10	0	0	0
NSW	Tamworth	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Albury	EnergyAustralia	Total Plan	19	0	0	0
NSW	AGN Albury	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Albury	AGL	Business Essentials Saver	0	0	0	0
NSW	AGN Cooma	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Cooma	Red Energy	Business Saver	0	0	0	0
NSW	AGN Holbrook	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Murray Valley	EnergyAustralia	Total Plan	19	0	0	0
NSW	AGN Murray Valley	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Murray Valley	AGL	Business Essentials Saver	0	0	0	0
NSW	AGN Tumut	Origin Energy	Business Flexi	0	14	0	0
NSW	AGN Tumut	Red Energy	Business Saver	0	0	0	0
NSW	AGN Wagga Wagga	Origin Energy	Business Flexi	0	14	0	0
VIC	Multinet 1	AGL	Business Essentials Saver	0	0	0	0
VIC	Multinet 1	Covau	Super Saver Plus	0	20	0	0

State	Pricing zone	Retailer	Name	Guaranteed discount off bill (%)	Guaranteed discount off usage (%)	POT discount off bill (%)	POT discount off usage (%)
VIC	Multinet 1	EnergyAustralia	Total Business	23	0	0	0
VIC	Multinet 1	Lumo Energy	Value	0	0	0	0
VIC	Multinet 1	Momentum Energy	Market offer	0	0	0	0
VIC	Multinet 1	Origin Energy	Business Go	0	0	0	0
VIC	Multinet 1	Simply Energy	Business Saver	17	0	0	0
VIC	Multinet 1	Powershop	Carbon Neutral	0	0	0	0
VIC	Multinet 1	Red Energy	Business Saver	0	0	0	0
VIC	Multinet 2	AGL	Business Essentials Saver	0	0	0	0
VIC	Multinet 2	Covau	Super Saver Plus	0	20	0	0
VIC	Multinet 2	EnergyAustralia	Total Business	23	0	0	0
VIC	Multinet 2	Lumo Energy	Value	0	0	0	0
VIC	Multinet 2	Momentum Energy	Market offer	0	0	0	0
VIC	Multinet 2	Origin Energy	Business Go	0	0	0	0
VIC	Multinet 2	Simply Energy	Business Saver	17	0	0	0
VIC	Multinet 2	Powershop	Carbon Neutral	0	0	0	0
VIC	Multinet 2	Red Energy	Business Saver	0	0	0	0
VIC	Ausnet Central 1	AGL	Business Essentials Saver	0	0	0	0
VIC	Ausnet Central 1	Covau	Super Saver Plus	0	20	0	0
VIC	Ausnet Central 1	EnergyAustralia	Total Business	23	0	0	0
VIC	Ausnet Central 1	Lumo Energy	Value	0	0	0	0
VIC	Ausnet Central 1	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet Central 1	Origin Energy	Business Go	0	0	0	0
VIC	Ausnet Central 1	Simply Energy	Business Saver	17	0	0	0
VIC	Ausnet Central 1	Powershop	Carbon Neutral	0	0	0	0
VIC	Ausnet Central 1	Red Energy	Business Saver	0	0	0	0
VIC	Ausnet Central 2	AGL	Business Essentials Saver	0	0	0	0
VIC	Ausnet Central 2	Covau	Super Saver Plus	0	20	0	0
VIC	Ausnet Central 2	EnergyAustralia	Total Business	23	0	0	0
VIC	Ausnet Central 2	Lumo Energy	Value	0	0	0	0

State	Pricing zone	Retailer	Name	Guaranteed discount off bill (%)	Guaranteed discount off usage (%)	POT discount off bill (%)	POT discount off usage (%)
VIC	Ausnet Central 2	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet Central 2	Origin Energy	Business Go	0	0	0	0
VIC	Ausnet Central 2	Simply Energy	Business Saver	17	0	0	0
VIC	Ausnet Central 2	Powershop	Carbon Neutral	0	0	0	0
VIC	Ausnet Central 2	Red Energy	Business Saver	0	0	0	0
VIC	Ausnet West	AGL	Business Essentials Saver	0	0	0	0
VIC	Ausnet West	Covau	Super Saver Plus	0	20	0	0
VIC	Ausnet West	EnergyAustralia	Total Business	23	0	0	0
VIC	Ausnet West	Lumo Energy	Value	0	0	0	0
VIC	Ausnet West	Momentum Energy	Market offer	0	0	0	0
VIC	Ausnet West	Origin Energy	Business Go	0	0	0	0
VIC	Ausnet West	Simply Energy	Business Saver	17	0	0	0
VIC	Ausnet West	Powershop	Carbon Neutral	0	0	0	0
VIC	Ausnet West	Red Energy	Business Saver	0	0	0	0
VIC	AGN Central 1	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN Central 1	Covau	Super Saver Plus	0	20	0	0
VIC	AGN Central 1	EnergyAustralia	Total Business	23	0	0	0
VIC	AGN Central 1	Lumo Energy	Value	0	0	0	0
VIC	AGN Central 1	Momentum Energy	Market offer	0	0	0	0
VIC	AGN Central 1	Origin Energy	Business Go	0	0	0	0
VIC	AGN Central 1	Simply Energy	Business Saver	17	0	0	0
VIC	AGN Central 1	Powershop	Carbon Neutral	0	0	0	0
VIC	AGN Central 1	Red Energy	Business Saver	0	0	0	0
VIC	AGN Central 2	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN Central 2	Covau	Super Saver Plus	0	20	0	0
VIC	AGN Central 2	EnergyAustralia	Total Business	23	0	0	0
VIC	AGN Central 2	Lumo Energy	Value	0	0	0	0
VIC	AGN Central 2	Momentum Energy	Market offer	0	0	0	0
VIC	AGN Central 2	Origin Energy	Business Go	0	0	0	0

State	Pricing zone	Retailer	Name	Guaranteed discount off bill (%)	Guaranteed discount off usage (%)	POT discount off bill (%)	POT discount off usage (%)
VIC	AGN Central 2	Simply Energy	Business Saver	17	0	0	0
VIC	AGN Central 2	Powershop	Carbon Neutral	0	0	0	0
VIC	AGN Central 2	Red Energy	Business Saver	0	0	0	0
VIC	AGN North	AGL	Business Essentials Saver	0	0	0	0
VIC	AGN North	Covau	Super Saver Plus	0	20	0	0
VIC	AGN North	EnergyAustralia	Total Business	23	0	0	0
VIC	AGN North	Lumo Energy	Value	0	0	0	0
VIC	AGN North	Momentum Energy	Market offer	0	0	0	0
VIC	AGN North	Origin Energy	Business Go	0	0	0	0
VIC	AGN North	Simply Energy	Business Saver	17	0	0	0
VIC	AGN North	Powershop	Carbon Neutral	0	0	0	0
VIC	AGN North	Red Energy	Business Saver	0	0	0	0
QLD	APT Brisbane South	AGL	Business Essential Saver	0	0	0	0
QLD	APT Brisbane South	Origin Energy	Business Flexi	0	8	0	0
QLD	APT Brisbane South	Red Energy	Business Saver	0	0	0	0
QLD	APT Brisbane South	Covau	Freedom	0	15	0	0
QLD	APT Brisbane South	Alinta Energy	Business Deal	0	0	0	0
QLD	Envestra Brisbane North	AGL	Business Essential Saver	0	0	0	0
QLD	Envestra Brisbane North	Origin Energy	Business Flexi	0	8	0	0
QLD	Envestra Brisbane North	Red Energy	Business Saver	0	0	0	0
QLD	Envestra Brisbane North	Covau	Freedom	0	15	0	0
QLD	Envestra Brisbane North	Alinta Energy	Business Deal	0	0	0	0
QLD	Envestra Northern	Origin Energy	Business Flexi	0	8	0	0
QLD	Envestra Wide Bay	AGL	Business Essential Saver	0	0	0	0
QLD	Envestra Wide Bay	Origin Energy	Business Flexi	0	8	0	0
QLD	Envestra Wide Bay	Covau	Freedom	0	15	0	0
SA	Envestra SA	AGL	Standing offer	0	0	0	0
SA	Envestra SA	EnergyAustralia	Total Plan Business	3	0	0	0
SA	Envestra SA	Origin Energy	Business Flexi	0	8	0	0

State	Pricing zone	Retailer	Name	Guaranteed discount off bill (%)	Guaranteed discount off usage (%)	POT discount off bill (%)	POT discount off usage (%)
SA	Envestra SA	Simply Energy	Business Saver	11	0	0	0
SA	Envestra SA	Red Energy	Business Saver	0	0	0	0
SA	Envestra SA	Lumo Energy	Basic	0	0	0	0
SA	Envestra SA	Discover Energy	Budget	0	15	0	0
SA	Envestra SA	Alinta Energy	Business Advantage	0	0	0	0
TAS	TGN	Aurora	Small business	0	0	0	0
TAS	TGN	Tas Gas	Small business	0	0	0	0
ACT	EvoEnergy	ActewAGL	Business Gas	0	15	0	0
ACT	EvoEnergy	EnergyAustralia	Toatal Plan	19	0	0	0
ACT	EvoEnergy	Origin Energy	Business Flexi	0	15	0	0
ACT	EvoEnergy	Red Energy	Red Business Saver	0	0	0	0
WA	South West	Alinta Energy	Business	0	0	0	0
WA	South West	AGL	Business Savers	0	45	0	0
WA	South West	Origin	Business Flexi	0	32	0	0
WA	Albany	Alinta Energy	Business	0	0	0	0
WA	Kalgoorlie	Alinta Energy	Business	0	0	0	0