



CUSTOMER INSIGHTS COLLABORATION RELEASE TWO STAKEHOLDER STEERING GROUP INVITATION FOR EXPRESSIONS OF INTEREST

July 2022

Overview

The Customer Insights Collaboration is an Energy Security Board (ESB) initiative to bring multiple stakeholder interests together to support building an evidence base of customer insights to inform reforms (and related activities) in the Post 2025 DER Implementation Plan.

The ESB is seeking expressions of interest for the Stakeholder Steering Group (SSG) that will support Release Two of the Customer Insights Collaboration.

In Release Two, the SSG will work with the ESB and the teams across the market bodies leading DER Implementation Plan reforms to explore, interpret and help the project teams apply the insights gathered in Release One.

This document provides key information about the Customer Insights Collaboration and the role of the SSG, as well detailed of the application process.

Interested stakeholders are invited to submit expression of interest to the ESB using the online application form [online application form](#) by **19 July**. The ESB will assess applications and engage the SSG ahead of first meeting of the Group in early August 2022.

Context

Implementing the Post 2025 reforms

In its Post-2025 Market Design Review, the ESB recommended a Distributed Energy Resources (DER) Implementation Plan to support the effective integration of DER and flexible demand. The Plan prioritises activities now to address emerging risks, and sequences technical, market and regulatory reforms over the next three years to enable co-design and collaboration with industry stakeholders and customer groups as a key part of its delivery. Reforms are intended to leverage technology and data, improve access and efficiency, enhance market participation, and strengthen customer protections and engagement.

The Plan includes reforms aimed at:

- **rewarding customers for their flexible demand**, enabling access to products and services that innovation offers, and managing risks to customers through the right protections, no matter how customers choose to use or receive energy, or their level of engagement;
- **integrating flexible DER and flexible demand** into the market at all levels, safely and effectively’;
- **supporting a phased implementation of reforms** where possible, to enable parties to transition earlier to new arrangements where standards are in place, and where barriers to enter the market can be safely removed; and
- **development of reforms using a customer-centric approach**. A collaborative approach will be used to consider and co-design solutions to key customer challenges, with insights informing activities and reforms across each horizon of the DER Implementation Plan pathway.

Energy Ministers have asked the ESB to progress the DER Implementation Plan. This includes progressing and coordinating the immediate and initial regulatory, technical and market reforms identified

in the Plan, as well as providing Energy Ministers with advice on additional reforms that will be developed as part of it.

Customer Insights Collaboration to support design and implementation

The purpose of the Customer Insights Collaboration is to gather insights about the energy needs and expectations of households, businesses and communities, as well as how they are using their energy resources, to inform the design and delivery of the DER Implementation Plan.

In Release One, the Customer Insights Collaboration explored the barriers and enablers for customer reward for flexible DER and energy use. In addition to exploring the potential for flexibility to benefit all households, businesses and communities, this work identified key issues at each step in the customer journey for flexibility products and services that need to be considered in the design and delivery of the reforms, and by governments and the energy sector more generally as the transformation unfolds.

The high-level message from Release One was the need to meet consumers with diverse motivations, abilities and opportunities where they are by:

- adopting an inclusive design approach to unlock and share the benefits of DER for all consumers;
- making flexible DER and energy use attractive through effective and efficient incentives;
- talking to consumers about flexible DER and energy use in ways that are relevant to the way they live their lives and run their businesses; and
- earning consumers' trust to unlock the benefits of flexible DER and energy use.

The detailed insights from Release One will be outlined in the Knowledge Sharing Report and a supporting rapid evidence review that will be published in July 2022.

The focus of Release Two of the Customer Insights Collaboration will be working with the teams across the market bodies leading DER Implementation Plan projects to help them explore, interpret and apply the insights gathered in Release One.

This engagement with the project teams will include:

- identifying and interpreting relevant insights in Release One Knowledge Sharing Report and rapid evidence review;
- mapping customer journeys supported by the reforms to better understand the experience and issues relevant to diverse household and business energy consumers;
- developing insights frameworks and tools that can inform the design and delivery of the reforms; and
- supporting direct engagement with energy consumers to gather insights and perspectives relevant to the reforms.

The retailer authorisation and exemptions review, interoperability and scheduled lite workstreams will be a particular focus of the SSG's work in Release Two, given the implications of these reforms for how consumers use their equipment, engage in the market and are rewarded and protected.

The approach to Release Two is informed by preliminary work by the SSG for Release One with the project teams. This included workshops with the interoperability and retailer authorisation workstreams to identify the services and support customers require to get the most from their rooftop solar PV and battery storage at each step in the customer journey, and to identify the benefits and risks of new energy services for different consumers.

Customer Insights Collaboration (CIC) structure

The CIC is organised around six-month blocks of work on key customer issues relevant to DER Implementation Plan reform activities. It involves active engagement with the project teams and stakeholders through iterative co-design workshops. These workshops are independently facilitated and follow human-centred design principles to support customer centric thinking and leverage use cases to test practical implementation issues.

Customer research and direct customer engagement is be incorporated into the program as well as any additional technical work to inform the process.

At the end of each release, a knowledge sharing report is published to detail the insights and possible solutions emerging from the work. At that stage, the next Release will begin. The CIC is not a decision-making body and does not replace existing governance process. The CIC instead will provide decision and policy makers with insights on cross cutting issues facing customers today.

Expectations of the Stakeholder Steering Group (SSG)

The SSG helps guide the collaboration, including by reviewing relevant evidence and exploring different perspectives to refine problem statements, identifying the key issues to be explored through the stakeholder workshops, and interpreting the insights to be captured in the knowledge sharing reports. The SSG is independently facilitated and operates on a consensus basis.

A new SSG of up to 9 people is established for each release, with some membership continuity between the releases where appropriate. Diversity of membership is important, including stakeholders from technology, networks, retailers, market bodies, consumer organisations, clean energy providers and academic institutions.

The SSG will meet to plan and work through insights from the workshops and will require a total time commitment of approximately 30 hours over the course of six months. Health and travel restrictions meant that most of the workshops and other engagement for Release One was held online. In Release Two, we hope to conduct as much of our work as possible in-person to support open and collaborative discussion, with the locations selected to maximise convenience for participants. The SSG will meet fortnightly for 2 hours, commencing with a longer in person kick-off workshop to meet each other and refine and agree the approach and schedule.

SSG members will not be remunerated, however the ESB is willing to discuss financial support for participation on an as needs basis.

Key roles and responsibilities include:

Role	Responsibilities
ESB Board	<ul style="list-style-type: none">• Receive CIC knowledge sharing reports and consider implications for DER Implementation Plan delivery• Publish knowledge sharing reports to build collective knowledge base of key insights from each release
ESB Secretariat	<ul style="list-style-type: none">• Resource and support the collaboration• Engage independent facilitators• Engage Stakeholder Steering Group• Gather evidence and commission research• Draft and publish knowledge sharing reports, working with SSG and independent facilitator
Independent facilitator	<ul style="list-style-type: none">• Plan and facilitate the collaboration workshops, drawing on relevant human-centred design methodologies• Ensure all voices and perspectives are heard

- SSG representatives
- Attend regular SSG meetings
 - Contribute to customer insights collaborating including, but not limited to, provision of information, sharing of ideas and data, attending workshops, supporting presentations and completing agreed actions
 - Participating in collaboration workshops
 - Reviewing material including knowledge share report and similar CIC outputs

Indicative Customer Insights Collaboration schedule for 2022

2022	Activities
July	<ul style="list-style-type: none"> • Launch Release Two <ul style="list-style-type: none"> ◦ EOI's to recruit interested parties for Stakeholder Steering Group ◦ Publish Release One Knowledge Sharing Report
August	<ul style="list-style-type: none"> • Stakeholder Steering Group kick-off workshop (in-person if possible) • Stakeholder Steering Group meetings with project teams
September	<ul style="list-style-type: none"> • Stakeholder Steering Group meetings with project teams
October	<ul style="list-style-type: none"> • Collaboration Workshop 1 • Stakeholder Steering Group meetings with project teams
November	<ul style="list-style-type: none"> • Collaboration Workshop 2 • Stakeholder Steering Group meetings with project teams
December	<ul style="list-style-type: none"> • Publish knowledge sharing report

Application process

The application process is quite simple and is intended to provide opportunities for a diverse range of stakeholders. Selection will be based on establishing a well-rounded representative group from across the energy sector. Representatives will be sought from consumer advocacy, network, retailer, technology, research and government.

To apply simply complete this [online application form](#) by 19 July.

Stage	Timeframe
Applications open	8 July 2022
Applications close	19 July 2022
Stakeholder Steering Group notified	29 July 2022
Release 2 SSG first meeting	Early August