



Jemena Gas Networks

Overview of JGN'S Engagement
Program for 2025-30 Access
Arrangement Review

Page intentionally blank



Acknowledgement of Country

We acknowledge the Traditional Owners of the lands upon which we operate and recognise their continuing connection to land, waters, and culture.

We pay our respects to their Elders past, present, and emerging.

Pictured: artwork by Aboriginal artist Chern'ee Sutton from Mount Isa for our Group's Reflect Reconciliation Action Plan

Contents

1. Introduction from our Managing Director.....	5
2. Purpose.....	6
3. A strong track record of genuine and collaborative engagement with our customers.....	7
4. The overarching approach and our progress so far.....	9
4.1 Gas Networks 2050	9
4.2 Engagement Program for the 2025-2030 Access Arrangement.....	10
4.3 Streams and timelines.....	12
5. Engagement flow for the customer forums	14
6. Engagement design	16
7. The benchmark: AER Better Resets Handbook	17
8. Our customers and stakeholders	18
8.1 Customer analysis	19
8.2 Stakeholder analysis	23
9. Expectations for AER staff involvement	30
10. Evaluation.....	31



1. Introduction from our Managing Director

The energy transition before us is not only one for business, and governments to solve. The challenge, conversation and the response must actively involve and consider customers and communities.

This is complex. But this complexity should not deter us from meeting the challenge head on, with a critical, questioning mindset. Spending time with customers and stakeholders is always insightful. It's great to understand the issues which are front of mind for many at the moment.

What we've heard so far from our customers are concerns about like rising cost of living pressures, energy affordability and reliability.

What we've heard from stakeholders through our Advisory Board and Expert Panel processes is the need for flexibility and adaptability as key engagement principles. They've articulated the problem statement in Jemena's context and planning horizons, considering possible response areas and future scenarios.

The outcomes from our engagement are important as they will directly impact the future of our business, and ultimately, all of our customers. Your feedback will directly feed into our next price and service plan we will submit to the Australian Energy Regulator for approval.

Within this document, you'll find the thinking behind our engagement across Gas Networks 2050 and the Access Arrangement for 2025-2030. There's been a great deal of thinking and discussion so far and we're building on that for the future.

In our inaugural November 2022 Customer Forum customers were tasked with considering what the energy challenge means to our 1.5 million customers. In 2023, the Customer Forum are reconvening to determine what is in the best interest of customers as we make key decisions about our future.

This document provides you with useful background and contextual information around our planning for engagement. I encourage you to get familiar with this content so you can rigorously and enthusiastically launch your conversations with Jemena as we undertake this work in collaboration with our stakeholders and customers from 2023-2025.

I look forward to what we learn from you through this journey we are taking together.

Yours sincerely,

Frank Tudor

Managing Director
Jemena



Figure 1: Frank Tudor speaking with Advisory Board members Mary Karras (CEO Ethnic Communities Council NSW) and Andrew Richards (CEO Energy Users Association of Australia)

2. Purpose

This document provides an overview of Jemena Gas Networks (NSW) Ltd's (JGN) engagement program for its 2025-30 Access Arrangement review. It sets out how we will genuinely and transparently engage with our customers on the key challenges impacting our network as the energy system transforms to a net zero carbon future so that they can help shape our 2025-30 Plan. Figure 2 shows an overview of our services to customers.



Figure 2: overview of our network and customer services



Figure 3: Jemena team members at a culturally and linguistically diverse customer consultation

3. A strong track record of genuine and collaborative engagement with our customers

Jemena has a strong and proud track record of undertaking comprehensive, genuine and collaborative engagement with its customers. **Figure 5** illustrates how our customer engagement program is grounded in the way we focus on customers on a daily basis.

Jemena's vision is *'Creating sustainable energy solutions with communities'*. Putting customers at the heart of everything we do is part of our DNA. To drive this through the organisation we have established 'Think like a customer' as one of our five company values and through this we commit to *ensuring that our actions consider our customers, community and other stakeholders*.

Layered underneath our vision and values is our strategy of fostering a customer-focused culture through continuous improvement, innovation, competitiveness, and preparing for the future.

Nested underneath this are the tools that inform this strategy and help us to deeply understand the customer experience – our market research work especially in customer satisfaction and our customer segmentation. Finally, the core principles adopted for our engagement shows how this whole approach underpins our regulatory proposal and ensures customers will be at the heart of our 2025-30 Plan.



Figure 4: our customer forum in November 2022

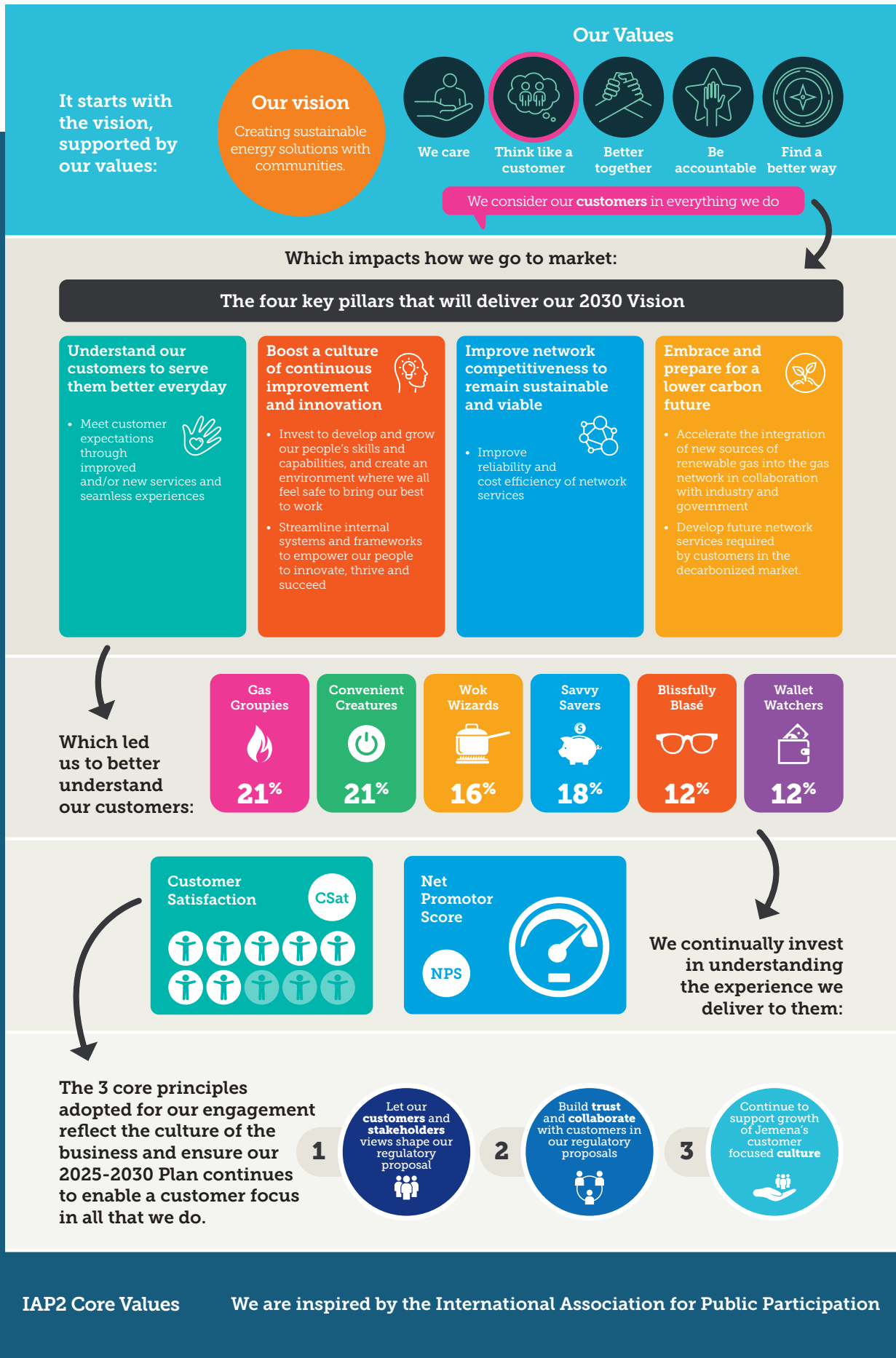


Figure 5: our customer story

4. The overarching approach and our progress so far

Our engagement approach includes targeted and purposeful engagement with a broad range of our customers and interested stakeholders, encompassing the key elements required to satisfy an early signal pathway as set out by the AER in its Handbook.

We articulate two stages of our engagement program below.

4.1 Gas Networks 2050

Gas Networks 2050 is Jemena's response to the energy transition and uncertainty for the future role of gas networks—in many scenarios, gas consumption is expected to significantly decline, technologies will change, policy settings for renewable energy transition will evolve and regulatory responses will adapt. This uncertainty points to a need to adapt and be ready for whatever the future might bring. Together with our customers and interested stakeholders we will explore this challenge head-on, and the decisions and actions that can be made in the best interests of customers as we position our network for the future.

Our Gas Networks 2050 engagement program will ensure that our customers can influence both the direction and pace of transition by Jemena to 2050, with a specific focus on the actions that we can take during the 2025–30 period.

The Gas Networks program is made up of:

- An **Advisory Board**, which is independently chaired and composed of a diverse set of stakeholders, including customers, customer advocates and industry representatives. It was established to collaborate with Jemena to explore the challenges associated with the uncertain future role of gas networks, the implications for different customer groups, and various options which could form part of Jemena's 2023 customer engagement strategy.
- Our Advisory Board functioned as a source of advice to support, strengthen and shape Jemena's customer engagement approach for our 2025–30 Plan, while maintaining a long term view out to 2050. Our approach to the Advisory Board originally included eight sessions commencing October 2022 through to April 2023, with the intention of ensuring participants could engage thoughtfully and informatively. To support the Advisory Board through the series the sessions moved through a spectrum of engagement, including co-design in the initial pre-briefings and sessions, inform and consult during the deep dive sessions, and involve and collaborate in the later sessions and deliberative day. The Advisory Board agreed on a statement of objectives, and filtered response options to take forward for customer consideration, as shown in the Series Overview below in **Figure 6**.

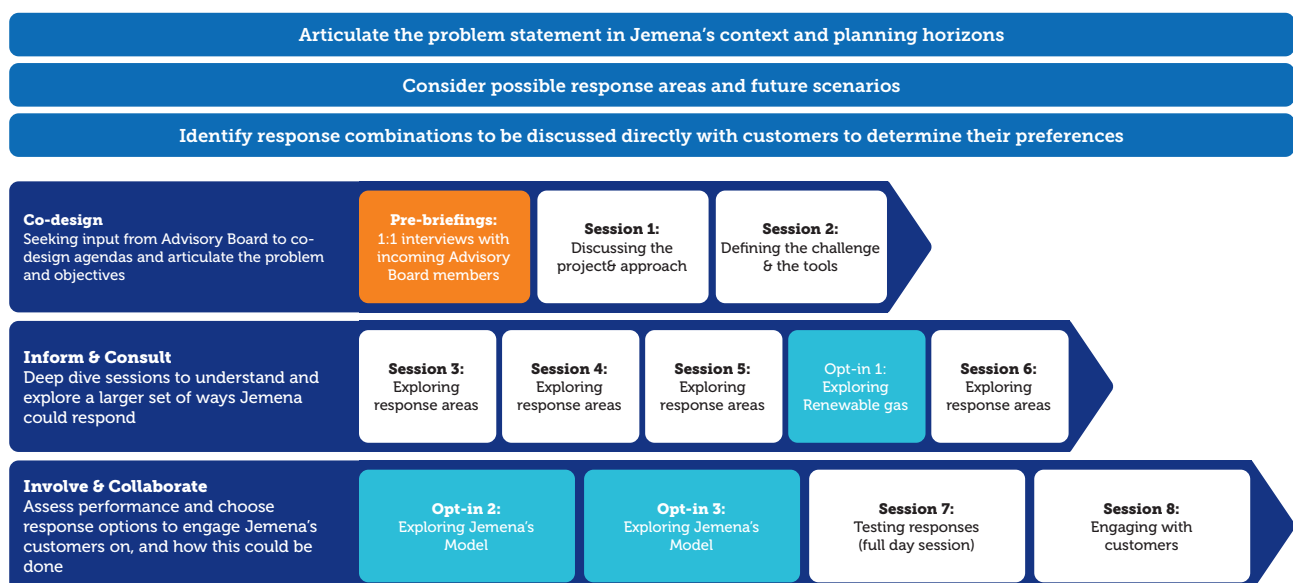


Figure 6: Advisory Board objectives and series overview

- An **Expert Panel**, comprised of energy industry experts and tasked with co-designing four plausible scenarios for the future of the NSW energy system and future of gas through four facilitated Expert Panel sessions. As noted by the AER in its Information paper, it expects regulated businesses to provide plausible future energy scenarios that covers a spectrum of outlooks from the most pessimistic to the most optimistic for their networks, and to estimate the likelihood of each scenario. It considers that good consultation will involve a range of scenarios being put to customers with respect to demand forecasts, expenditure and any stranding mitigation measures, together with the price impacts of those scenarios. The scenarios developed by the Expert Panel will provide the lens by which we will test the strategies and actions that we might adopt during the 2025–30 period, so that our customers can understand the long term implications of our plans. **Figure 5** shows the Expert Panel series overview and outputs of future scenarios that will be explored in the customer forums.


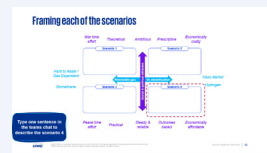

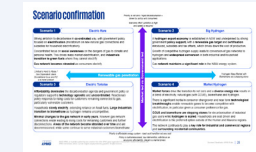
Session	Objective	Output
Session 1: Introductions, Scenario Purpose & Drivers	<ul style="list-style-type: none"> Facilitate stakeholder introductions and align on scope, project objectives, and establish guiding principles Outline the process and purpose of plausible scenario development Guest speaker presentation on energy system trends from Dr Alan Finkel Shortlist of potential scenario drivers 	
Session 2: Scenario Framing	<ul style="list-style-type: none"> Select final driver combination Start to develop high-level scenario narratives for scenarios and possible names for each Discuss fixed and variable assumptions across the scenarios 	
Session 3: Scenario Detailing & Enablers	<ul style="list-style-type: none"> Shortlist potential scenario names Relative scaling of each scenario Generate assumptions and economic rationale relevant to Jemena's model for each scenario Articulate the trajectory of scenarios across 2030 and 2050 time horizons 	
Session 4: Agree Scenarios & Review	<ul style="list-style-type: none"> Review and finalise scenario narratives in detail, including internal consistency Review assumptions and economic rationale Finalise the name for each scenario Consider relative likelihood of each scenario 	

Figure 7: Expert Panel series overview

Gas Networks 2050 makes up the first stage and we are now transitioning into consultation for the 2025–2030 Access Arrangement engagement program.

4.2 Engagement Program for the 2025–2030 Access Arrangement

This section outlines the next steps of the engagement program for the core of the access arrangement.

- A **Customer Forum**, comprising over 50 of Jemena's residential customers from across our network. Our inaugural Gas Networks 2050 Customer Forum was held on 12 November, and will continue to meet over seven deliberative sessions in 2023 and 2024. Using deliberative engagement techniques, we will collaborate with our customers on the actions that we can take over the 2025–30 period to ensure that their long-term interests are maintained. During our inaugural session, we heard about what matters most to our customers; with energy affordability, safety, and reliability continuing to top the list. Our customers also want to understand more about the energy transition and what it will mean for them, they are also interested in learning more about renewable gases and how we are planning for the future. We also asked our customers how they want to be engaged in the future, and what support they needed to do so. Their feedback will inform our engagement design. We have developed a remit and are looking to this customer

forum to help us respond. The remit is:

Australia is transitioning to net zero carbon emissions by 2050. We see a role for Jemena Gas Networks in the transition and beyond 2050. However, there is more and more uncertainty in the energy sector, and cost of living pressures and energy prices are rising. We want to adapt and take action now, but we need the support of customers to do this. Can we do this in a way that is fair for customers over the next five years, and beyond, whilst managing uncertainty and affordability.

- **Key voices**, two groups that will provide key input into the customer forum, focusing on the voices of culturally and linguistically diverse (CALD) customers, and our young customers that need specific engagement processes. These two groups will develop 'personas', designed to provide detailed information to the customer forum about perspectives and lived experiences of these key voices. We have partnered with Ethnic Communities Council (ECC) of NSW and Youth Action NSW to assist with recruitment with these groups. The details include:
 - For **Culturally and Linguistically Diverse Customers**: observing new arrivals and established or emerging communities, are particularly vulnerable in terms of changes to policy and cost from government or organisations. They also receive their information from friends and connections, rather than directly from the source organisation and are sensitive to price changes. Referring to [CALD Best Practice in a consumer centric energy market](#) we are supporting the ECC to undertake a series of up to 15 interviews per language group and three workshops with the educators, targeting the communities of:
 - Tamil
 - Nepali
 - Assyrian / Arabic
 - Vietnamese
 - For our Youth Steering Group: consisting of young people aged between 18–24 including young people from diverse backgrounds including those with disability, LGBTQIA+. Noting they're deeply concerned about environmental impacts and affordability, and very interested in the future, noting it takes a long time to build trust with this group, we've designed four (4) forums for this group and partnered with Youth Action NSW for recruitment. The group will fully discuss, debate and comprehend all the complexity and provide key perspectives about the future and how the future of energy and its complexity.
- **Tariff Structures Forum**: to address the Australian Energy Regulator's (AER) requirement for additional consultation around price controls with household customers, in order to consider the merits of a price cap vs a revenue cap tariff structure, Jemena also wants to understand household customer preferences towards different tariff reform options. We will be convening an additional representative customer forum (a fresh group, separate to the customer forum described previously) on Tariffs of approximately 20 household customers, meeting across four online evening sessions (three hours each) between June and October 2023. This deliberative group would work closely with a 'Brains Trust' – aka our Advisory Board – who would become 'servants' of the group to provide key information and value to assist the group with their deliberations.

This is a tailored engagement program, designed to meet the needs of specific customer groups making up our diverse customer base. Our engagement with our customers will be informed by the advice and guidance provided by our Advisory Board members and our engagement partner. Its design will also be guided by the customers that we are engaging with, to ensure that they are able to meaningfully participate in our engagement process. For example, we're also engaging with large industrial customers and retailers through a series of one-on-one interviews and broader forums to ensure their views are heard at times and locations suitable to them.

To provide independence and a seasoned approach, we engaged:

- KPMG to act as our independent facilitator to our Advisory Board and Expert Panel sessions in Gas Networks 2050.
- BD Infrastructure to act as our engagement partner and assist with the design and execution of our customer engagement program, and facilitate our Customer Forums and key voices.

4.3 Streams and timelines

Figure 8 shows how our engagement streams fit together, including our tailored engagement with specific groups. We will continue to adapt our approach to incorporate key learnings and feedback as we progress through our engagement process.

Our engagement timeline is shown in **Figure 9**. Recognising that we need to be adaptive the needs of our customers we will continue to review, refine and update our engagement approach, including the timeline of our engagement activities, to ensure they can continue to meaningfully participate in our process and shape our 2025-30 Plan.

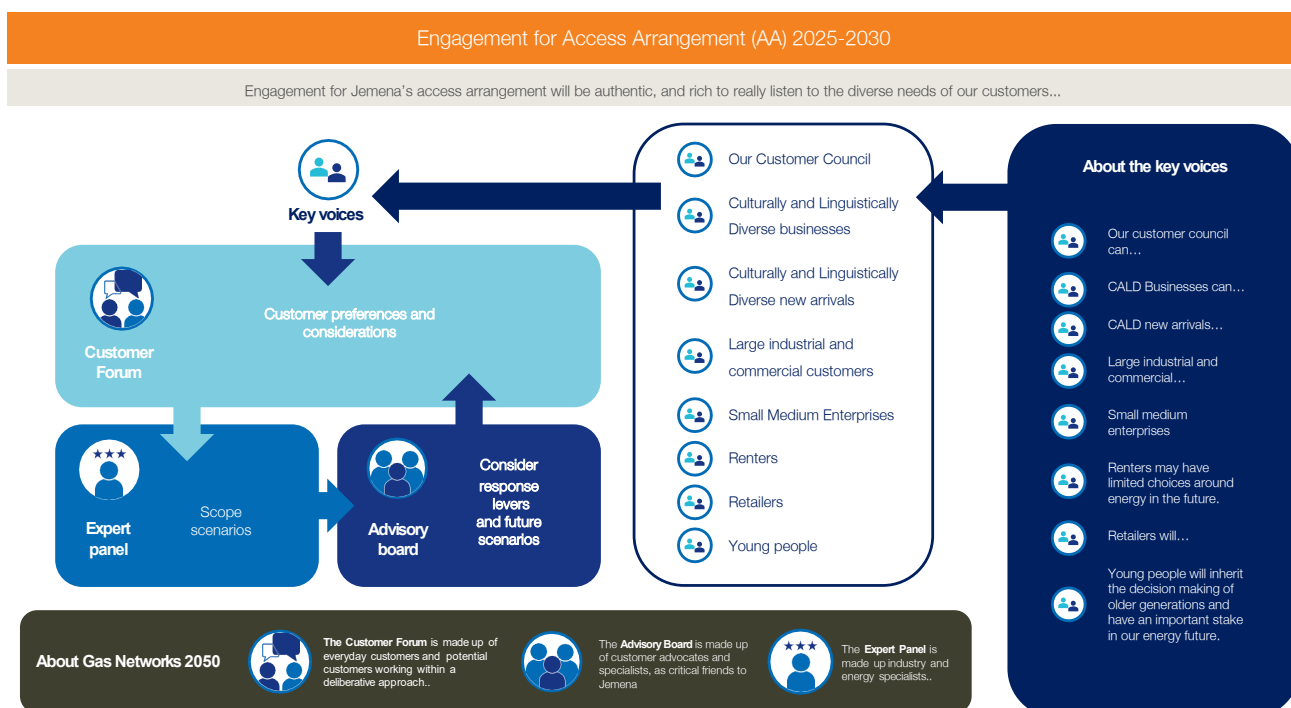


Figure 8: how our engagement streams fit together

Timeline

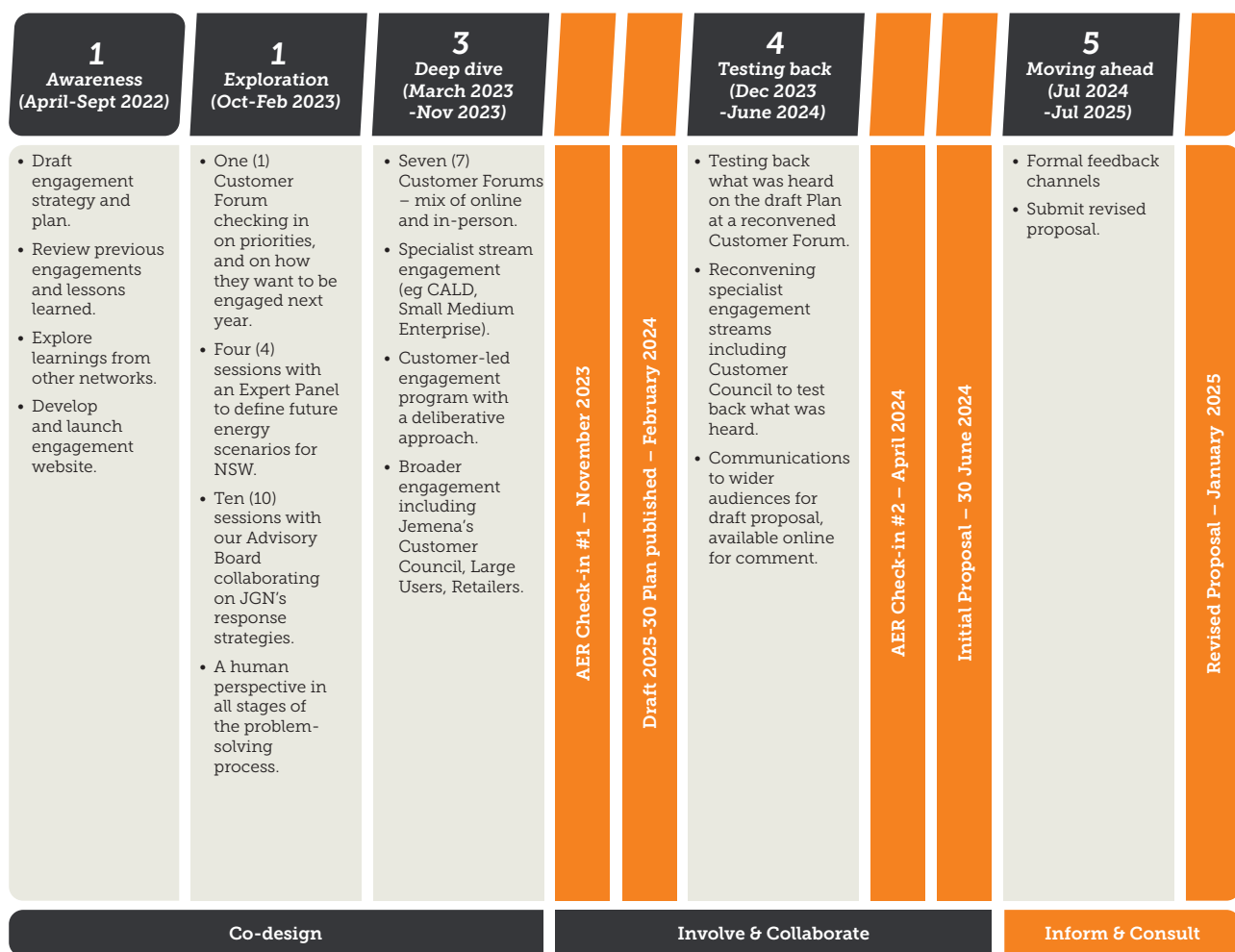


Figure 9: our timeline for the Access Arrangement

5. Engagement flow for the customer forums

To provide more detail, the engagement flow for the Customer Forums and the overall context is included below.

Context of uncertainty

- Jemena Gas Networks is planning for the future in changing and uncertain times.
- The move to Net Zero is happening. Policy and legislation have been set. Australia has made a move to renewables and the shift to rooftop solar has been significant.
- Energy experts expect households and small businesses to increasingly move away from gas appliances and electrify. We don't know how rapid or to what extent this transition will occur.
- Moving away from gas will be harder and more costly for some people than others. We need to support all our customers.
- We believe there is role for biogas and hydrogen in reaching, and helping transition to, Net Zero. This role is clearer for large use customers who need a reliable source of energy. But there are also opportunities for residential and small business customers who would like to retain a gas option.
- However, legislation, policy and customer markets are not as developed for biogas and hydrogen as they are for renewable electricity. In addition, the case for biogas and hydrogen isn't as clear cut with the public.

The regulatory plan

- Our regulator requires us to prepare a plan outlining what we plan to spend over the next five years, and how this will impact customers' bills. Our plan for 2025-2030 needs to be prepared amid uncertainty about the future of gas. This presents us with challenges:
 - If we plan too strongly for a gas future by investing in our network, and gas use continues to decline, fewer and fewer customers may end up paying for assets that aren't needed.
 - If we plan too strongly for an electric future by rolling back our network, and electrification isn't as extensive or as rapid as we anticipate, gas customers will be under-served.
- The Regulator gives us certain 'responses' that we can use to manage this uncertainty and the impacts to customers and our business. The regulator also sets rules for how much of our investment cost we can pass on to customers.
- We need customers' help to use these responses in the right way, and guidance on whether investments in renewable gas are in customers' long-term interests.

We've designed the engagement flow for the customer forums to reflect this. **Figure 10** on the next page reflects the engagement flow of the customer forums and key voices.

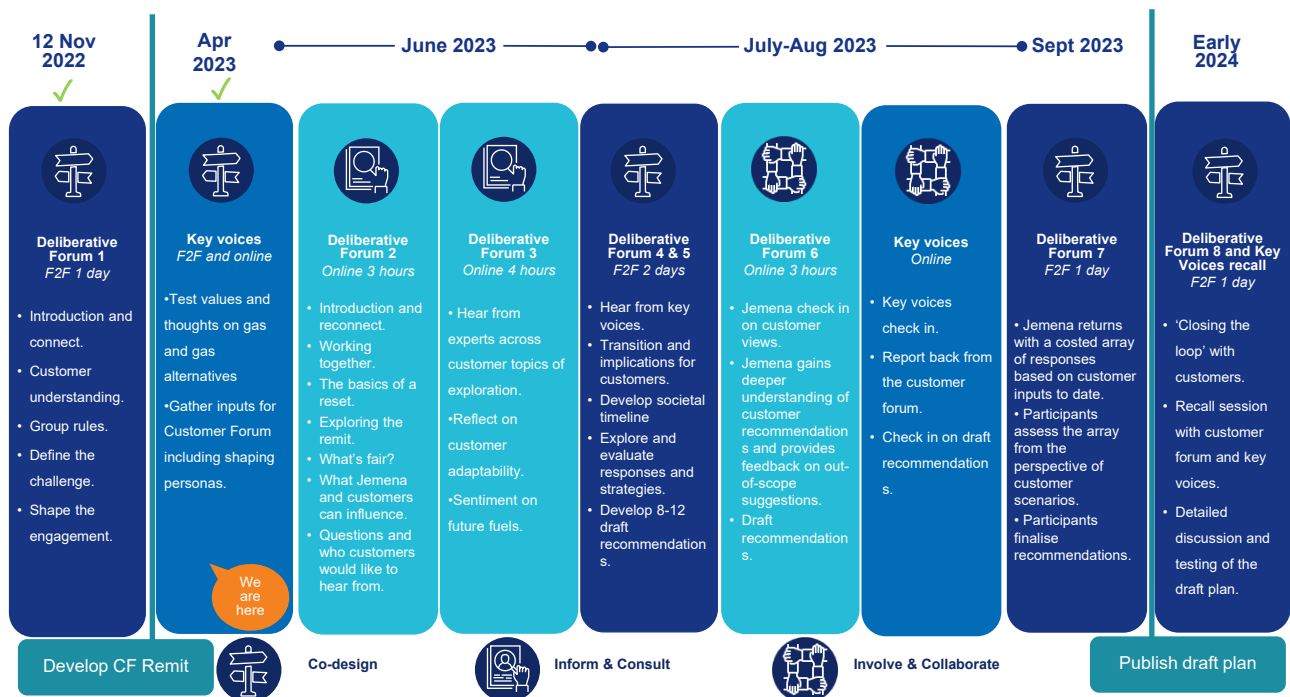


Figure 10: engagement flow and key voices and how they fit together

6. Engagement design

Jemena has a strong track record of engagement. Our engagement program builds on the key learnings from past engagement programs, including the engagement program that we undertook for our 2020-25 Plan, which jointly won the Energy Networks Australia (ENA) 2019 Customer Engagement Award together with the program that we conducted for our Jemena Electricity Networks (Vic) Ltd regulatory proposal.

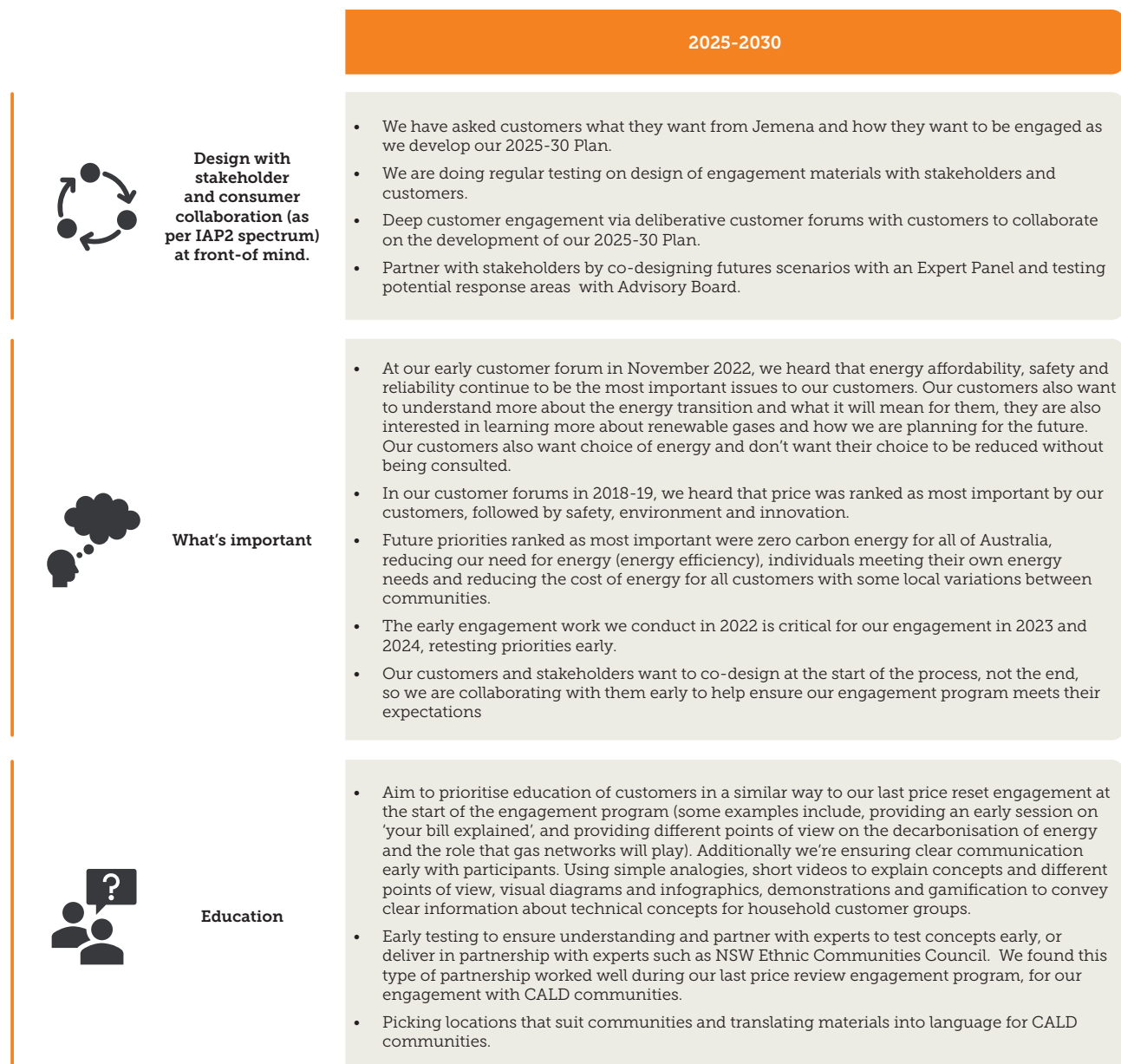


Figure 11: our engagement design

7. The benchmark: AER Better Resets Handbook

AER Better Resets Process	What's expected of us	What this means for us
 <p>Nature of engagement</p>	<ul style="list-style-type: none"> Sincerity of engagement: understand and reflect customer preferences in the regulatory proposals. Customers as partners: collaborate and empower customers when developing proposals. Equipping customers: provide accurate and unbiased information, transparent governance. Accountability: delivering on commitments and improving relationships. 	<ul style="list-style-type: none"> Active listening and reporting back showing what we've done with customer feedback (for example, improving aspects of our Plan to align with customer feedback, or if they can't align, have a feedback mechanism to explain why, reflecting section 3.4.2 independent customer support for the proposal) Co-designing our engagement and proposal with stakeholders and customers (reflected in the feedback from customers and stakeholders in the independent report) Creating authentic and genuine engagement opportunities (reflected in the methodology or engagement design providing ample and genuine engagement opportunities) High level of buy-in and attendance at engagement events (for example – consistently steady numbers of attendees over multiple customer forum sessions, enthusiasm and engagement maintained for the life of the engagement program, measured through positive formal survey feedback). Information is provided genuinely openly, transparently and education is used to help with decision-making (for example using images and video to explain concepts and providing different perspectives, Jemena team listening to customers and participating in the engagement). Keeping a focus on deliberative engagement that puts decision-making in the hands of customers (for example through design and execution of our customer forums with a focus on deliberative engagement – aligned with the formal definition, allowing time, resources, and information to equip customers to make a decision) Ability and budget for Advisory Board to commission independent consultants and research (for example commissioning customer research independent of Jemena) Managing Director, Executive Director Networks, non-Executive Board Members, General Managers and senior executives will attend engagement sessions.
 <p>Breadth and depth</p>	<ul style="list-style-type: none"> Accessible, clear and transparent engagement: set out engagement plans, overall objectives and influence customers can expect. Consultation on desired outcomes and then inputs: customers guide the development of proposals. Multiple channels of engagement: use of varied channels aligned to customer preferences. Customers influence on the proposal: 'collaborate' and where appropriate 'empower' customers (IAP2 spectrum) 	<ul style="list-style-type: none"> Channels and methods used to target different customers (CALD, vulnerable customers) and they decide how they participate. Mix of online and face-to-face engagement suited to participants needs. Committing a high level of resources to our engagement. Consultation is focused on long-term outcomes and a collaborative approach. Conversations with customers that may be 'strategically uncomfortable' for Jemena. Running a robust and transparent engagement process by publishing outcomes regularly on the your network, your say website. Our engagement builds on our business as usual engagement. Taking the opportunity to engage early – to date we have held our first customer forum in November 2022, four (4) sessions of our Expert Panel and four (4) Advisory Board sessions. Providing early opportunities for feedback and direction-setting. Providing opportunity online for a wide range of customers that we aren't able to speak to face-to-face at our forums via engagement tools at yournetwork.jemena.com.au. Advisory Board and Expert Panel declaration of interests register.
 <p>Evidence of impact</p>	<ul style="list-style-type: none"> Proposals linked to customers preferences: clear link between research, engagement and representation, and testing customer perspectives on the draft. Independent customer support for the proposal: demonstrated through submissions or independent report. 	<ul style="list-style-type: none"> Seek the chance to test and verify our assumptions regularly. Early testing of concepts and seeking early feedback from customer advocates through our Advisory Board. Seek clarity and alignment on what we collect evidence on. Commissioning an independent review and report of our engagement by The newDemocracy Foundation Information is provided genuinely, openly, transparently and education is used to help with decision-making. Using format 'you said, we heard, our response' with our documentation and feedback to stakeholders and customers. Taking the opportunity to engage early with both stakeholders and customers. Actively focusing on the longer-term benefits for customers, not just the short term.

Figure 12: our planned engagement as per the better resets handbook

8. Our customers and stakeholders

This section provides an overview of our customers and stakeholders identified for consultation.

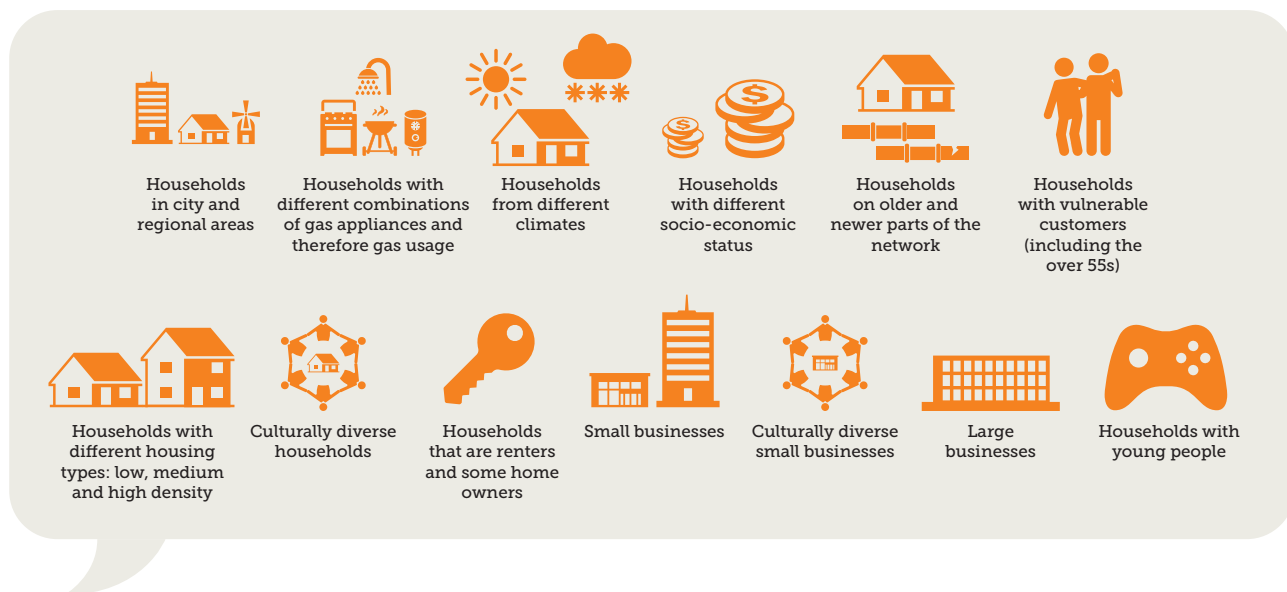


Figure 13: our different customers



8.1 Customer analysis

As we prepare our engagement we realise it's important to understand key interests and concerns of customers. There are genuine opportunities to engage with customers on this journey. We recognise those groups we have a relationship with, those we continue to build a relationship with and potentially some new customer groups too. This section outlines the different customer groups, their expectations for us for this engagement and how we plan to address.

Customer Group	Areas of interest	How we will address
Peak bodies representing customer groups or who provide emergency support for vulnerable customers – for example Council of the Ageing, St Vincent De Paul, Public Interest Advocacy Centre (PIAC), Ethnic Communities Council, NCoss, Consumer Action Law Centre, Brotherhood of St Lawrence.	<ul style="list-style-type: none"> Concerns about impacts of rising gas prices to vulnerable customers and other specific customer groups. Concerns about those customers left on the network. Concerned about climate change and perception of gas industry's contribution to that. Perceive renewable energy network to be less expensive. Planning ahead is important. Want to know how benefits are shared between all energy users. 	<ul style="list-style-type: none"> Consult with vulnerable customers through inclusion in our customer forums and support for them to participate for example providing technology, internet connection, and support. Consult with non-English speaking background communities and customers. Ensure the opportunity to feed into design of engagement through early conversations.
Large customers – metropolitan – examples include Brickworks, BHP, Port Kembla, Orica, Qenos, Boral, Bluescope Steel, Interface Carpets, others include private hospitals, hotels, laundries, distilleries, glass manufacturers and agriculture.	<ul style="list-style-type: none"> High level of service. Use about half the gas in NSW. Looking for prudent discounts. Fuel aligns with market movements and global events for example Ukraine situation has influenced natural gas price. No flexible use – must use gas at a time that suits them for largescale production / industry when staff are available. Some are considering moving operations offshore. Steady inflow of new customers for example building materials, distilleries businesses. Concerns about being 'forced' to take hydrogen and impact on business. Considering pivoting to other forms of renewables, sustainability aspirations. 	<ul style="list-style-type: none"> Large customer forum planned for August 2023. Proactive regular engagement where needed for example monthly meetings during customer plant expansion. Bespoke engagement where needed for example for shorter term reactive issues, or specific projects.

Customer Group	Areas of interest	How we will address
Small business customers – metropolitan. Examples include bakeries, restaurants and takeaways.	<ul style="list-style-type: none"> Time poor and experience barriers to engagement. Unaware of options to renegotiate. Embedded networks (for example shopping centres). Fluctuating gas prices. Bill shock. Future gas usage. 	<ul style="list-style-type: none"> Provide opportunities to engage at times and locations suitable. Ensure all voices are heard. Providing information about Jemena upfront. Providing information on the Gas Networks 2050 project. Build trust up through multiple discussions if required.
Small business customers – regional. Examples include major agricultural producers, peak bodies like the prune growers association.	<ul style="list-style-type: none"> Getting connected. Service levels. Communications with Jemena Interest in renewable gas. Satisfaction with responsiveness of Jemena. Not enjoying competition benefits of market from retailers. 	<ul style="list-style-type: none"> Provide opportunities to engage at locations suitable to these businesses, give them a voice and space to consider what Jemena is saying. Providing information about Jemena upfront. Jemena will pursue a rigorous, robust approach to engaging with customers in an open, transparent and respectful way. Build trust up through multiple discussions if required.
Cultural and linguistically diverse customers (CALD)	<ul style="list-style-type: none"> Language barrier, confidence and skills to participate in engagement. Experience of gas before coming to Australia. Concepts of fairness. Increasing knowledge of Jemena, network and pricing impacts. 	<ul style="list-style-type: none"> Partner with Ethnic Communities Council for engagement design, recruitment, translation and facilitation. Redesign visual and video content for use in workshops Meet in areas familiar to them for example at the library or community space in a local suburb.

Customer Group	Areas of interest	How we will address
Vulnerable household customers	<ul style="list-style-type: none"> Respond well to supportive and in-depth techniques like study circles. Difficulty navigating the energy system – language and literacy barriers. Understanding the gas bill. Bill shock is of deep concern to this group. 	<ul style="list-style-type: none"> Use a gentle cascading approach with questions like ‘what does it mean for me?’, ‘what does it mean for others?’ and ‘what should be done?’ Allow participants to contribute at their own pace as traditional engagement methods can exclude this group. Align and build up confidence, trust and group cohesion based on shared views and experiences.
Aboriginal and Torres Strait Islander people	<ul style="list-style-type: none"> To improve, protect and foster the best interests of all Aboriginal persons. Traditional owners of the land where Jemena operates. Opportunities to engage and want to see Jemena actioning community responses and doing deep, thoughtful engagement that has longevity. Engagement with vulnerable communities in ways that suit them and come to community. 	<ul style="list-style-type: none"> We will involve Aboriginal and Torres Strait Islander people in our engagement at times and places convenient to them with suitable engagement techniques. Respect for and listening to Traditional owners early in the process. Potential to include Aboriginal employees of Jemena in our consultation processes that recognises their connection to country and community. Observe all protocols in Jemena’s reconciliation action plan and continue to improve based on feedback we receive from community.
Young people	<ul style="list-style-type: none"> Want to engage with process but don’t know how. Feel safer engaging with organisations they trust. Don’t feel like their opinions are valued. Want incentives in return for their time. 	<ul style="list-style-type: none"> Involve young people from the beginning of the project Make it interactive and engaging. Leverage familiar organisations / institutions to build trust. Aim for mutual benefit or capacity building through engagement. Be flexible and open to new ideas.

Customer Group	Areas of interest	How we will address
Metro household customers – across regions of for example includes Sydney North, Sydney South, Hunter, Wollongong. For example, includes Lithgow, Gosford, Newcastle, Wollongong, Morriston, Kiama and Campbelltown.	<ul style="list-style-type: none"> • Loyalty to gas – many believe gas is an essential service. • Want to access to clear information easily • Price is important, safety is a primary concern and also care for the environment is vital. • Expect Jemena to be innovating and planning for the future. 	<ul style="list-style-type: none"> • Design processes that aim to take customers ‘on the journey, use education and fun and engaging techniques and allow time to absorb new information. • Incentivise for time and declare these in our engagement reporting.
Regional household customers – across the Country regions for example includes Bathurst, Orange, Oberon, Goulburn, Dubbo, Narromine, Wellington, Griffith, Cowra, Leeton, Narrandera, Cootamundra, Young, Boorowa, and Yass.	<ul style="list-style-type: none"> • Socio-economic challenges, access to services. • Moving to net zero may be more difficult as some customers have always relied on gas as a fuel source. • Care for the environment is important to this group. 	<ul style="list-style-type: none"> • Specific methods and processes to engage and include regional household customers (in person or online). • Ask these customers how they would like to be engaged. • Allow for participation from different groups and the space and ability to participate.

8.2 Stakeholder analysis

Noting our stakeholders do have very different expertise and interests to our household customers, this section looks at our approach to stakeholders, what we know about them from our previous engagement, their areas of interest, and some suggestions as to how we'll approach our engagement with them.

Stakeholder Group	Areas of interest	How we will address
Regulators	<ul style="list-style-type: none"> Requirements for Jemena to develop and submit a revenue proposal every five years. Demonstrate how we have consulted with, considered and reflected the views of customers and stakeholders. 	<ul style="list-style-type: none"> Co-design methodology and price reset with stakeholders and customers Ask customers early for feedback including how they want to be engaged Engage with transparency, openness and meaning so they have a real influence on decisions.
State Government Agencies (including large users and partners)	<ul style="list-style-type: none"> NSW Government has a hydrogen focus and recognise that biomethane plays a role too. Interested in the pathway to electrification. 	<ul style="list-style-type: none"> Invitation to participate early in the process through the stakeholder advisory board / expert panel. Be authentic and genuine in our approach. Experts within NSW Government that can play a large role are on our Expert Panel.
Transport Agencies – Federal and State Government – for example Transport for NSW, Sydney Metro, Australian Rail Track Corporation.	<ul style="list-style-type: none"> Fairly neutral stakeholders around 'Gas Networks 2050' concepts Many are large users of gas Built up areas and potential for embedded network users around Metro Stations and other high-density areas in metro locations. 	<ul style="list-style-type: none"> Engaging with transparency and openness. Invitation early in the process to participate

Stakeholder Group	Areas of interest	How we will address
Local Government	<ul style="list-style-type: none"> In their Climate Emergency Action Plan, City of Sydney council includes renewable gas as part of their pathway to net zero. Councils are large users of gas for community facilities such as community centres, aquatic centres and libraries. Some are transitioning away from gas (eg Canterbury-Bankstown) and some have Climate Emergency Action Plans that includes transition to renewables. 	<ul style="list-style-type: none"> Involve Councils as key stakeholders early in the process through Advisory Board / Advisory Board Approach engagement openly and with transparency and honesty Seek to understand their issues and concerns early Ask key questions of these stakeholders and how we may be able to partner with them in future.
Renewable gas production partners – for example Sydney Water (For example Malabar Biomethane Project)	<ul style="list-style-type: none"> Many of these projects have their own consultation and regulatory timelines. Potential good messaging around driving sustainable energy solutions with communities, circular economy, helping to achieve net zero by 2050. 	<ul style="list-style-type: none"> Customer and stakeholder engagement could be incorporated if timings align. Consultation approached with care and trust at the heart and questions crafted carefully to ensure understanding.
Industry Groups – for example AI Group, Greenpower (Certification scheme), Climate Active (Certification scheme), Engers (under clean energy regulator), Green Building Council of Australia.	<ul style="list-style-type: none"> Neutral about our engagement program. Stakeholders on industry side – Greenpower (certification scheme – connecting to gas customer, solution on supply side not matching with demand, connecting customers to demand). Directly connecting through green power. Climate Active – recognise sustainability aspirations. They issue certification ‘stamp’ for net zero. Issue Large Scale Generation Certificate. From producer to end-user. Green Building Council Australia are not supportive of households using gas, for example they support programs households instructing them how to ‘get off’ gas. They have also produced research around gas leaks 	<ul style="list-style-type: none"> Thought leadership pieces perhaps in collaboration with some of these stakeholders. Be authentic and genuine in our approach. Provide industry research desktop research to counter existing research. Approach engagement with stakeholders openly and with transparency and emphasise how we are connecting customers to a renewable energy future.

Stakeholder Group	Areas of interest	How we will address
Industry research groups and networks – Future Fuels CRC, Australian Hydrogen Council, Bio Energy Networks Australia. Jemena supports through providing means for industry research.	<ul style="list-style-type: none"> Supportive on the our engagement approach particularly the early stages with ‘Gas Networks 2050’. Approach for stakeholder engagement through Advisory Board and Expert Panel, and we need to provide opportunities to engage with broader groups of stakeholders. 	<ul style="list-style-type: none"> Potential for collaboration on desktop research for thought leadership. Collaboration on engagement design with household customers at the early stage. Co-design of Expert Panel scenarios.
Australian Energy Market Operator (AEMO)	<ul style="list-style-type: none"> Neutral to negative sentiment around the Gas Networks 2050 project. 	<ul style="list-style-type: none"> Engage early with sensitivity and care.
University sector – RMIT, University of Queensland, University of Melbourne, University of Adelaide, Curtin University	<ul style="list-style-type: none"> Supportive of the Gas Networks 2050 project. Commissioned to do research around new technologies. 	<ul style="list-style-type: none"> Potential to engage early to be part of the expert panel. Engage with a high level of collaboration and transparency.
Industry Groups – Urban Development Institute of Australia, Housing Association, Property Council	<ul style="list-style-type: none"> Sceptical about our engagement process. Supportive of an electrification future, believe there is no future in gas. Excited about potential uses of renewable gas. 	<ul style="list-style-type: none"> Emphasise how Jemena is exploring transition to net zero through renewable gas projects such as Malabar Biomethane Project and Western Sydney Green Hydrogen Hub. Engage early with these groups and through peak bodies. Engage with authenticity, openness and transparency.

Stakeholder Group	Areas of interest	How we will address
Developers and construction – Frasers, Mirvac, Lendlease, Dexus, Landcom, BHL, John Holland, Laing O’Rourke.	<ul style="list-style-type: none"> Responsive to solutions. Not focused on providing gas for new estates / new builds. Supportive of an electrification future. Moving towards net zero 2050 and sustainability mandate. 	<ul style="list-style-type: none"> Sustainability is key. All have net zero aspirations. Gas / Energy infrastructure following, leverage off storage pipe. Very interested in renewable gas supply progress and there’s an opportunity to provide details of our projects. We can do more – help customers see the energy system, role and important role. Majority very interested in digital meters for customers although one questions why we would invest in an environment where gas is declining. Why solution to customers impacts them broadly for example network charges impacts them.

Stakeholder Group	Areas of interest	How we will address
Retailers – Origin, AGL, Energy Australia, Snowy Hydro, Red Energy, Lumo Energy Australian Energy Council, Momentum.	<ul style="list-style-type: none"> The ‘big three’ and the most interested and engaged in the Gas Networks 2050 are Origin, AGL, and Energy Australia. The team tends to engage at the more strategic level and the net zero or future fuels team (not the regulatory team). Origin is most progressed towards the ‘Gas Networks 2050’ they have done an industry study. Snowy Hydro / Red Energy also more progressed. 	<ul style="list-style-type: none"> Sustainability is key. All have net zero aspirations. Gas / Energy infrastructure following, leverage off storage pipe. Very interested in renewable gas supply progress and there’s an opportunity to provide details of our projects. We can do more – help customers see the energy system, role and important role. Majority very interested in digital meters for customers although one questions why we would invest in an environment where gas is declining. Why solution to customers impacts them broadly for example network charges impacts them.
Electricity Networks – Essential Energy, Endeavour Energy, Ausgrid	<ul style="list-style-type: none"> Essential and Endeavour recently qualified for Early Signal Pathway. All have net zero aspirations. Interested in Jemena’s engagement strategy both from a networks and collegiate perspective. 	<ul style="list-style-type: none"> Show how sustainability is key in Jemena’s engagement. Sharing views and progress around best practice engagement expertise. Emphasise collaboration and taking best practice from electricity networks to collaborate with and empower customers.
Media – local, national and international media, trade and industry-specific publications	<ul style="list-style-type: none"> Hungry for thought leadership from Jemena. Interest in specific engagement projects and processes and the network as an interconnected system. Questioning and sceptical about the gas network’s role in net zero emissions. 	<ul style="list-style-type: none"> Use thought leadership articles published on Jemena’s website, LinkedIn and accessible for Employees via ‘amplify’ to repost and reshare. Provide a lead to the conversation around renewable gas and meeting 2050 targets.

Stakeholder Group	Areas of interest	How we will address
Internal – Jemena shareholders, leadership team, staff	<ul style="list-style-type: none"> Highly engaged and aspiring to ‘empower’ and ‘collaborate’ level of engagement. Invested in the Gas Networks 2050 and excited about the multiple futures and preparing for this. Seeing that we can do more to help customers see the energy system. Keen for balance and diversity of the Advisory Board and the expert panel. 	<ul style="list-style-type: none"> Early briefings and feedback sessions to our leadership, for early input and strategic advice. Our leadership attends all customer forums and stakeholder sessions. Release articles at key project points on internal channels, yammer, intranet and internal emails – potentially from MD. Opportunity to be involved at Customer Forums and Advisory Board collaboration level.





Figure 14: Mapping our customers and stakeholders and our engagement approach

9. Expectations for AER staff involvement

Jemena welcomes AER staff and Customer Challenge Panel (CCP) attendance at any aspect of our pre-lodgement engagement. We recognise the time and effort involved in attending engagement activities and understand that the AER/CCP is unlikely to be able to attend every meeting or workshop. We can provide the AER and CCP with agendas and run-sheets for each of our engagements ahead of time, to help them determine which sessions it would like to attend.

We also invite the AER to confer with our customers, interested stakeholder and customer advocates to determine which sessions they would like the AER to attend. Our past consultation processes have taught us that our customers are often interested in hearing from our regulator, and we would welcome AER staff contributing the discussions with our customers if considered appropriate.

We would welcome any feedback that the AER or the CCP is willing to provide on our engagement with our customers and stakeholders as we progress through our engagement program. In particular, whether they are satisfied that we are meeting their expectations for engagement.

In past price review processes, we have valued regular engagement with AER staff throughout the pre-lodgement phase. This engagement has included updates on our customer engagement, the strategies that we are exploring, and the key elements of our plan as we are developing them. We have found that this helps to ensure a transparent, no-surprises approach. We would value a similar approach during the pre-lodgement phase for our 2025-30 Plan.

We have proposed two check-ins with the AER during our pre-lodgement phase. As part of these check-ins we would value feedback from the AER on whether it has any concerns with any aspects of our plan. We also intend to conduct deep dives on key elements of our draft 2025-30 Plan during February/March 2024.

10. Evaluation

Using a variety of techniques we will continually evaluate our engagement program, to ensure that it meets the expectations of our customers and remains aligned to IAP2 – noting evaluation is identified as essential in the IAP2 standards.

We've identified a variety of touchpoints including formal and informal feedback channels such as surveys, verbal or qualitative feedback (in-person or online), participation rates, independent evaluation and ways of asking participants about depth and breadth of engagement to evaluate our success. How we measure success continually across the program will include:

- Customers and stakeholders endorse and advocate for our process and our 2025–30 Plan: our customers understand, help shape and support our 2025–30 Plan.
- **Engaged and proactive stakeholders and customers throughout the process:** our stakeholders and customers are engaged and proactive, evidenced through informal and formal feedback channels.
- **Participants deeply consider the trade-off relationship between, for example service, quality, reliability and price:** our aim is to bring customers 'up to speed' on all the issues at play and provide an authentic engagement experience. We aim to action this by providing adequate time and transparent information in workshops, so customers can consider these relationships and trade-offs in a considered and authentic way. We can measure this through levels of satisfaction with our overall engagement design and engagement outcomes, for example, if they feel they've sufficient time and information to weigh up all the issues.
- **Measuring how we met customers and stakeholders expectations of the process:** measured through formal and informal qualitative and quantitative feedback channels for example interviews and surveys.
- **Stronger relationships with stakeholders and customers:** continue to build and strengthen relationships between Jemena and stakeholders and Jemena and customers.
- The AER and its CCP find that our engagement approach has met the requirements of the Handbook, and are satisfied that our customers have helped shape our 2025–30 Plan.

Following each engagement activity: specific feedback and measurements

After each customer forum, we will run a set of survey questions with participants and track these over time. They are questions presented on a Likert scale of strongly agree to strongly disagree to provide quantitative feedback, supplemented with open response questions to provide qualitative feedback. They question feedback from participants on engagement design as well as other factors such as setting, timing and venue that are important to certain customer groups such as CALD communities.

The questions could focus on workshop coordination, communication, level of engagement, did they learn something new, their interest in attending further sessions and constructive feedback for Jemena to action.

At the conclusion: Independent evaluation

In line with AER scope identified in section 3.4.2 of the Better Resets handbook, we propose an independent evaluation of our engagement program. This would be through an independent party, without Jemena's involvement, and may be customised for the different engagement streams in our plan.

For example, for our customer forums run by our engagement partner BD infrastructure, The newDemocracy Foundation (new Democracy) undertake the evaluation. We are proposing new Democracy because it is an international leader in deliberative democracy.

Our overall independent evaluation will be in line with the AER expectations, and would include:

- Seeking feedback on the quality of the engagement program (achieved through independent stakeholder and customer interviews and comparing to Jemena's previous engagement or energy network benchmarking)

-

