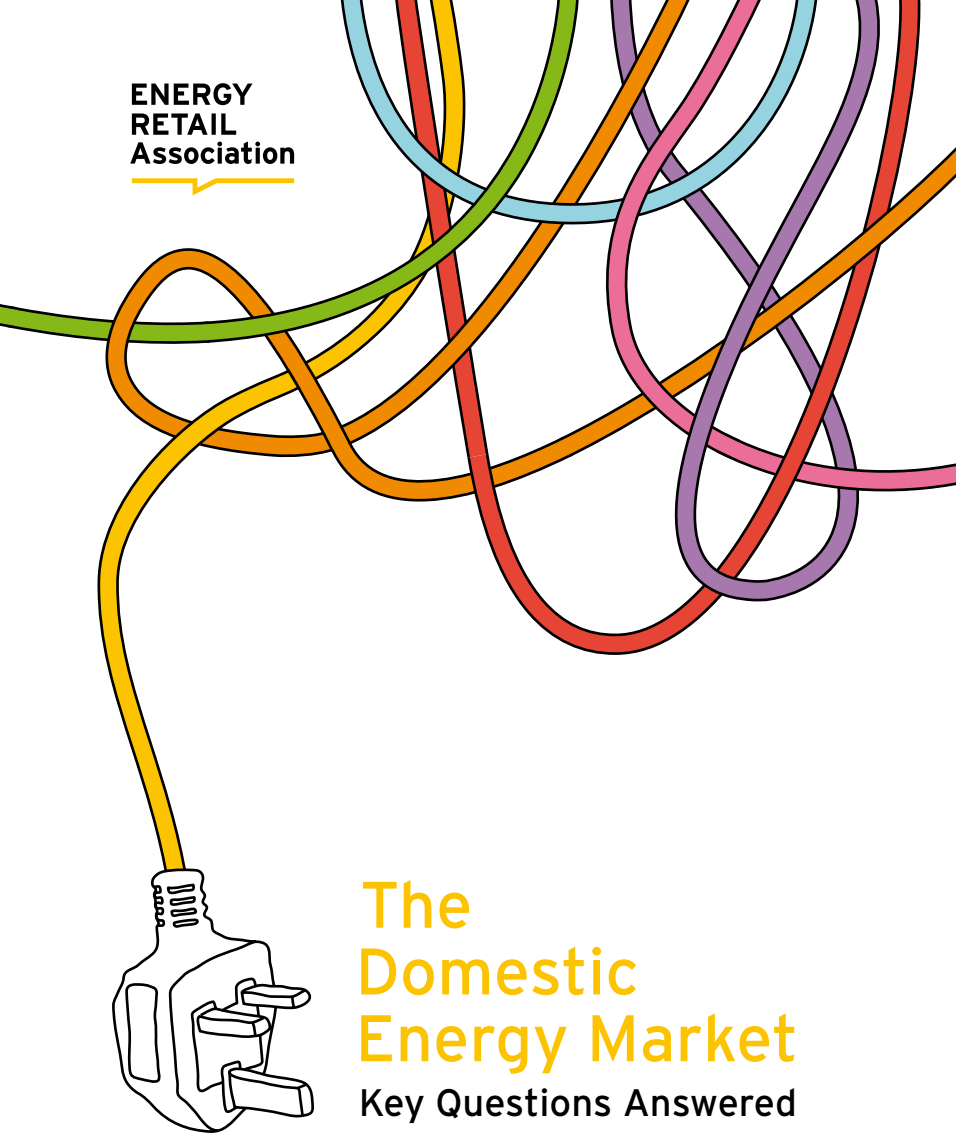


**ENERGY
RETAIL
Association**



The Domestic Energy Market

Key Questions Answered

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Twelve months is a long time in the energy industry

Energy is one of the most high profile and hotly-debated topics. We find ourselves at a pivotal point, with debates underway around the cost of energy, the transition to a low carbon economy and securing supply in a highly charged geopolitical environment.

In my first year as Chief Executive of the Energy Retail Association, we have seen a new Government department created with a specific energy remit, the transition to a new consumer champion, Consumer Focus, and the establishment of the Energy Act 2008.

Looking ahead, the Government's announcement in May 2009 on the delivery of smart meters to every home in Britain by 2020 truly heralded a new era for domestic energy use. New energy efficiency schemes such as the Community Energy Savings Programme (CESP) will also take the industry towards new and innovative programmes, when the current supplier obligations on energy efficiency end in 2011.

Given that the energy market can be complex, we have produced this short guide in order to present and clarify some of the most important issues currently facing energy suppliers in the domestic market in Britain.

The guide provides an introduction to the energy market and includes a brief outline about how energy arrives in people's homes, the regulatory regime in which suppliers operate, and how customers and suppliers interact with one another.

In providing key information, it also seeks to answer some of the most frequently asked questions that people have regarding the energy industry and suppliers. I hope you find it useful.

Garry Felgate

Chief Executive, Energy Retail Association

Energy market overview

1. Energy market overview

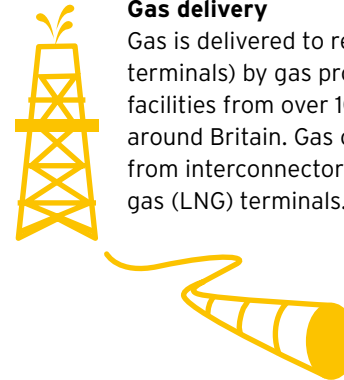
British energy suppliers have operated in a liberalised and competitive market since the 1990s. Since privatisation, more than £10 billion has been invested in the energy industry, which has not only kept prices amongst the lowest in the European Union (EU), but has also ensured that the lights have stayed on.

However, new investment is needed. Britain's energy infrastructure may require in excess of £230 billion between now and 2025. Investment in smarter metering, new generation capacity, and modernising the grid are all crucial in order to ensure that the industry is able to continue to meet the demand for energy. We all have our part to play in ensuring we use energy in a smarter and more sustainable way.

Over £10 billion has been invested to help Britain make the transition from an exporter to an importer of gas.

Gas: From barrel to bill

Producer and Terminal Operators



Gas delivery

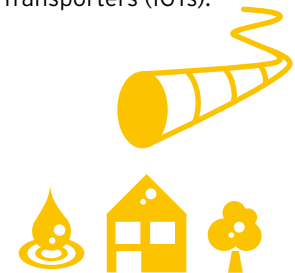
Gas is delivered to reception points (called beach terminals) by gas producers operating offshore facilities from over 100 fields beneath the sea around Britain. Gas can also be brought ashore from interconnector pipelines or liquefied natural gas (LNG) terminals.

Distribution

Gas is taken from the high pressure transmission system and distributed through low pressure networks of pipes to homes across the country. In addition to the eight large gas distribution networks, there are a number of smaller networks owned and operated by Independent Gas Transporters (IGTs).

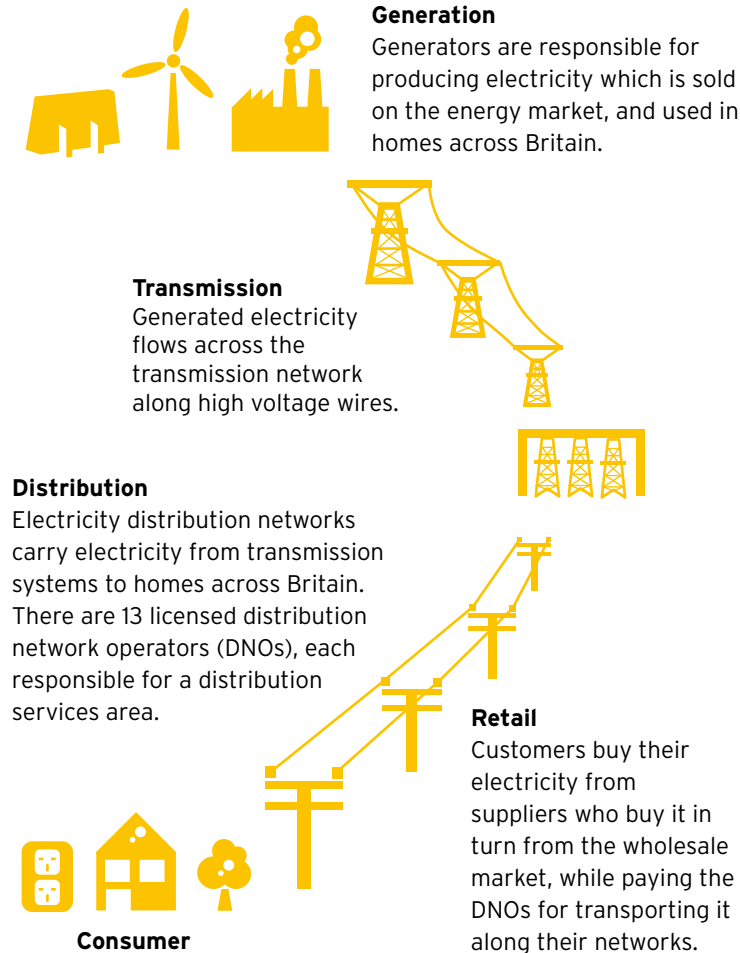
Retail

Customers buy their gas from suppliers who pay the networks for transporting it.



Consumer

Electricity: From plant to plug



Competitive market

How competitive is Britain's retail energy market?

In October 2008 the regulator found that the British retail energy market was amongst the most competitive of any throughout the world.¹

How is competition measured?

The engine of competition in the retail energy market is customer switching or 'churn'. By switching suppliers, customers can act as a competitive constraint on suppliers' pricing and provide strong incentives on suppliers to reduce costs, improve services and develop new products. Dual fuel and Direct Debit tariffs can offer the lowest prices and are the prime focus of competition among suppliers, and around 8.5 million customers benefit from these deals. The market share of suppliers in their former monopoly areas has continued to fall as they each compete for new business.

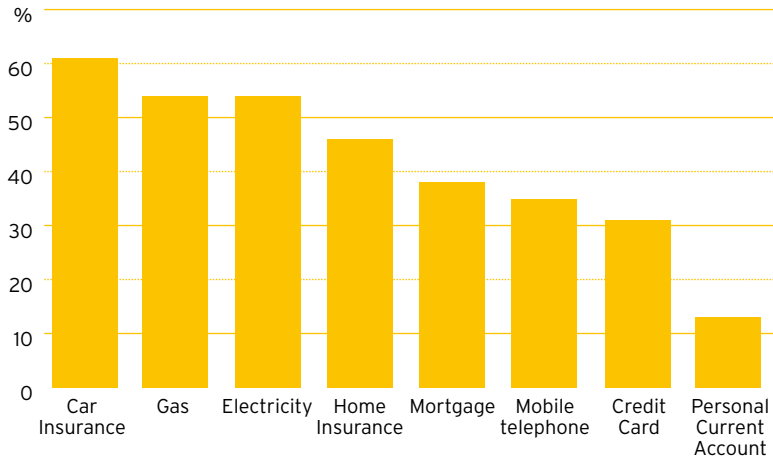
How much can a customer save by switching?

It is estimated that customers who have never switched and pay on receipt of their bill, or by using a prepayment meter, can save around £100 a year by switching supplier. They can also save money just by switching payment method which can save around £60 a year if paying by Direct Debit.

What are the switching levels in Britain?

Roughly 100,000 people switch energy supplier each week (more than five million per year), and annual energy switching rates in Britain are the highest of any large energy market in the world.²

Switching rates



With the exception of the car insurance market, more gas and electricity customers have switched their supplier than in any other major consumer services sector in Britain over the past five years.³

Energy prices

Do prices rise faster than they fall?

There is always a lag between changes in wholesale and retail prices, largely as a result of suppliers' hedging strategies. However, the regulator confirmed that this time lag is not greater when prices are falling than when they are rising.⁴

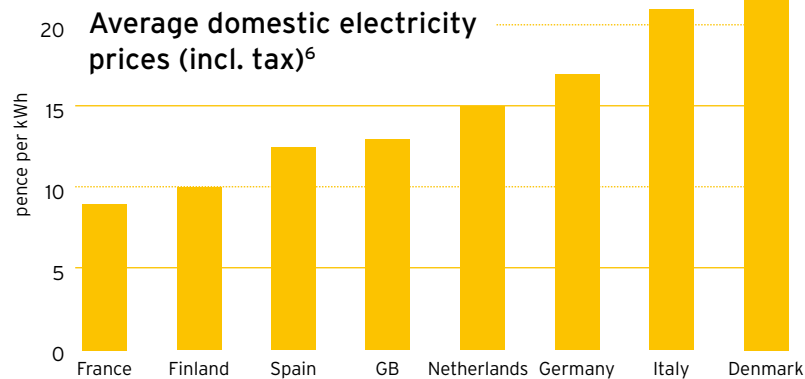
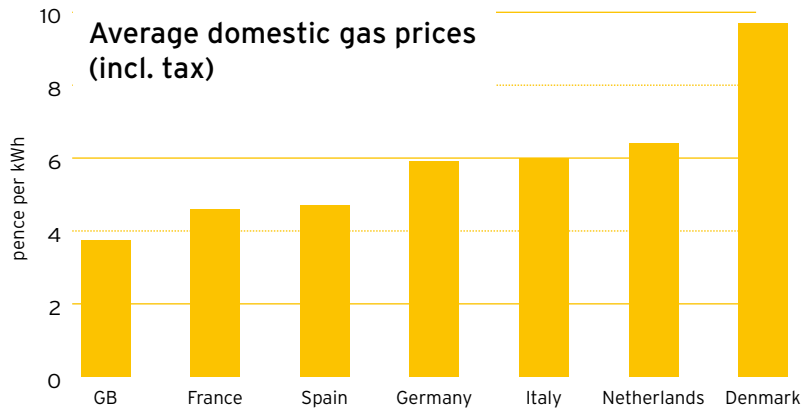
How does a hedging strategy work?

In order to ensure that energy suppliers have sufficient energy for their customers at the most competitive prices, suppliers decide what proportion of their energy should be bought ahead on the forward markets, as well as buying it on the day. Hedging not only enables smoother retail prices - protecting the customer by reducing the need for more frequent price changes and uncertainty - but also guarantees a secure supply of energy.

Are energy prices in Britain more expensive than elsewhere?

No. Throughout 2008 Britain had the cheapest gas prices and fifth cheapest electricity prices in the EU15.⁵

Between 2004 and 2007 wholesale gas prices rose by 170% but household bills increased by an average of 95% during this period.



Energy suppliers deliver electricity and gas to their customers in a competitive market, each trying to secure the best deals for their customers. In order to ensure that the market works as well as it can, it is overseen by an independent, economic regulator - Ofgem (Office of Gas and Electricity Markets).

Regulation

2. Regulation

The Government is accountable for British energy policy goals, and setting the framework which delivers them. Responsibility for regulating the liberalised market falls to Ofgem (Office of Gas and Electricity Markets), which is an independent regulator established by the Utilities Act in 2000. Energy suppliers participate in the market under licence. In order to achieve improvements in the service that they provide for their customers, energy suppliers also regulate themselves.

Ofgem's principal objective is to protect the interests of customers. Where appropriate, this will be achieved by promoting competition. In the course of making its regulatory decisions, Ofgem is also obliged to take into account the need for energy companies to: ensure there is security of supply, tackle climate change, and help vulnerable customers.

In what ways have suppliers regulated themselves?

The Code of Practice for Accurate Bills was created in 2006. The EnergySure Code was established in 2002.

What does the Code of Practice for Accurate Bills do?

In 2006 the Energy Retail Association (ERA) introduced a new Code of Practice to help domestic customers by clearly setting out what they can expect from their energy supplier, including:

- Clear, accurate, informative and timely bills and statements;
- Support and advice on monitoring energy consumption;

- Support and advice for those having difficulty paying their bills; and
- Contact details for asking questions and raising issues with their supplier.

What does the EnergySure Code do?

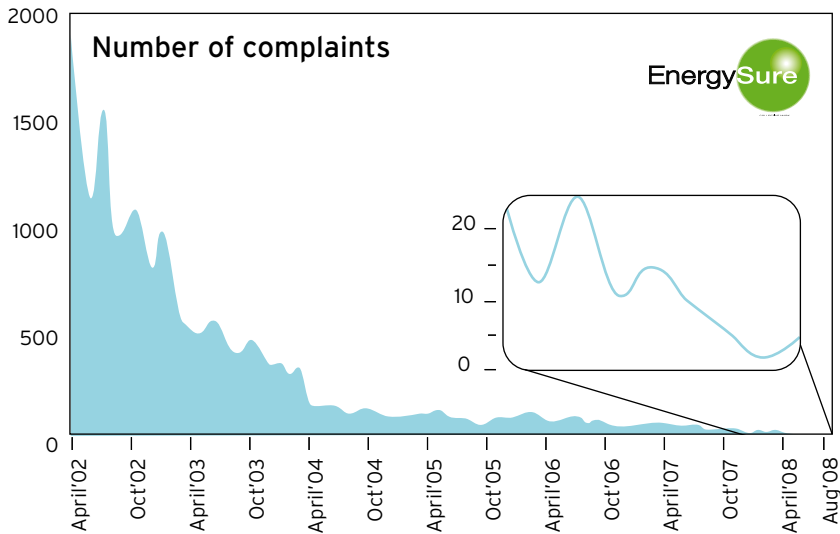
This Code was established in 2002 to ensure every energy supplier operates honest and independently audited doorstep selling practices. It is an agreed standard for the selling of gas and electricity supply contracts to domestic customers on the doorstep, through a combination of an approved training process and a register of accredited sales agents.

How is the EnergySure Code monitored?

An annual audit of individual member's compliance with the Code is carried out by the code auditor which is a firm of registered auditors.

46% of prepayment meter customers found information via 'door to door' agents compared with 9% via the internet.⁷

Billing and payment methods



What has the EnergySure Code achieved?

The Code has proved how successful self-regulation can work: the number of complaints against suppliers has dropped by over 99% since the Code's establishment in 2002.

For more information about the codes, please see:

EnergySure Code: <http://www.energy-retail.org.uk/salespractice.html>

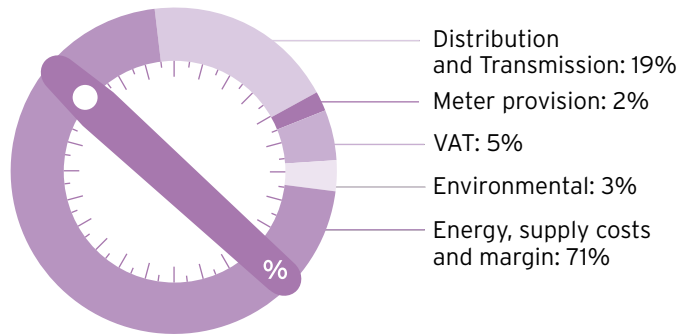
Billing Code: <http://www.energy-retail.org.uk/customerbilling.html>

The two self-regulatory Codes have resulted in significant improvements in customers' experiences with their energy suppliers. The customers' initial point of contact with their supplier is most likely to occur when they switch supplier or are billed for their energy.

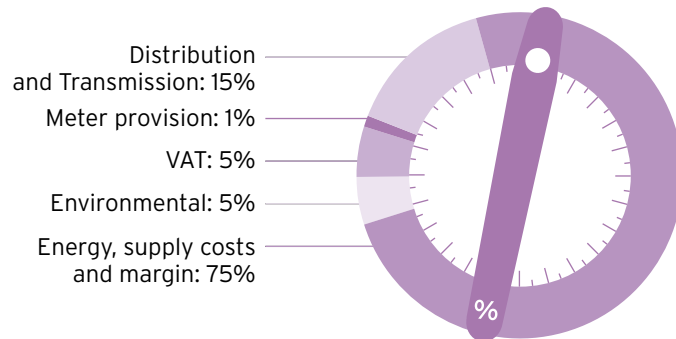
3. Billing and payment methods

Much of the communication between a customer and their energy supplier occurs via their energy bill. Some 200 million energy bills are issued every year across the country, and suppliers are aware of the importance of making bills accurate and easy to understand.

Ofgem's breakdown of a gas bill



Ofgem's breakdown of an electricity bill⁸



Each bill contains the following information:

- Energy used
- Amount owed
- Contact point for the supplier which can be used to check tariffs/ provide meter readings, etc
- Historical consumption data - which can be used for switching tariff

The frequency with which a customer receives a bill will depend on the way in which they pay for their energy. There are three main ways to pay:

- Direct Debit
- Prepayment meter (PPM)
- Standard credit

In September 2008, of all electricity customers:

- 37% paid by standard credit
- 49% paid by Direct Debit
- 14% paid by prepayment meter

In September 2008, of all gas customers:

- 38% paid by standard credit
- 51% paid by Direct Debit
- 11% paid by prepayment meter⁹

How are bills calculated?

The majority of energy bills are estimated. The frequency with which a customer provides regular readings from their electricity and gas meters, as well as meter readers being allowed access to read the meter are two key factors in producing accurate bills.

Why do PPMs cost more than other forms of payment?

In its Market Probe in October 2008, Ofgem found that service costs for PPM customers average £88 per customer more than for Direct Debit customers.¹⁰ The additional costs reflect more expensive meters, additional servicing costs, and specialised back-office administration systems.

Since January 2009, £300 million has been taken off the prices paid by PPM customers by suppliers.¹¹

Are customers with PPMs permitted to switch their energy supplier?

Yes. PPM customers actually switch at a higher rate than standard credit and Direct Debit customers.¹²

Why do PPM customers choose this method of payment?

According to the former consumer body, energywatch, two thirds of PPM customers (66%) said that they used this method of payment because it helped them control how much they spent on energy. In private rented accommodation, there is a greater tendency to have a PPM because a meter was fitted by their landlord.¹³

How do energy suppliers set Direct Debit levels?

Before signing up to pay by Direct Debit, energy suppliers will clearly explain how this payment method works. Suppliers base monthly payment amounts on the best available information on how much energy the customer uses. This could be from the customer's and / or the energy company's meter-readings, information provided by the customer about their home and lifestyle, or a standard usage profile generated by the supplier.

Can energy suppliers change the amount of a Direct Debit without letting the customer know?

Customers will be given 14 working days' notice (unless altered by prior agreement) of any change in the amount to be debited from their account or if the date or frequency of when payments are collected is to change.

What is the Direct Debit Guarantee?

Administered by Bacs, the Direct Debit Guarantee means that customers will be entitled to an immediate refund from their bank or building society if an error is made. Customers can cancel the Direct Debit agreement at any time by contacting their bank or building society.

Direct Debits are an important way for customers to pay for their energy use, and nearly 15 million energy accounts are paid in this way.

Smart meters

How will smart meters ensure that customers receive accurate bills?

Energy suppliers will install new meters with technology that communicates accurate and real-time information on energy use in the home to the customer and back to the supplier.

How will customers be able to receive information with smart meters?

In addition to customers receiving an accurate bill, suppliers will also be able to provide information on energy consumption through real-time display devices, mobiles, the internet or via digital TV, as well as related additional services and tariffs.

What other benefits will smart meters bring to customers?

- Smart meters will empower customers to make choices about how much energy they use, thus helping to reduce their bills as well as their carbon footprint;
- They will facilitate the deployment of microgeneration through the measurement of exported energy;
- They will enable energy to be priced at the time of use, therefore meaning that off peak electricity will be able to be sold at cheaper rates to peak electricity; and
- They will result in improved customer service.

When will customers get smart meters?

In 2008, the Government stated its intention that every home will have smart meters by 2020. This involves replacing around 45 million meters in 24 million households.

How much will a smart meter roll-out cost and who will pay?

A roll-out has been estimated to cost between £5-8 billion which energy suppliers expect to fund.

Will smart meter costs be passed on to customers?

Energy suppliers have stated their intention to undertake the roll-out of smart meters at no direct cost to the customer. The Department for Energy & Climate Change's (DECC) impact assessment shows a net benefit which supports this expectation.

Why are smart meters so important?

Britain is no longer an energy island and supplies of North Sea oil and gas are depleting. We all need to think more about how much energy we use and the carbon we emit. Energy suppliers are legally required to reduce the amount of carbon that they produce. Smart meters will enable this to happen on a large scale.

Occasionally customers may experience problems when dealing with their energy supplier. For around every 10,000 bills sent out, one customer complains. There is, however, a robust complaints handling process which includes access to a redress scheme.



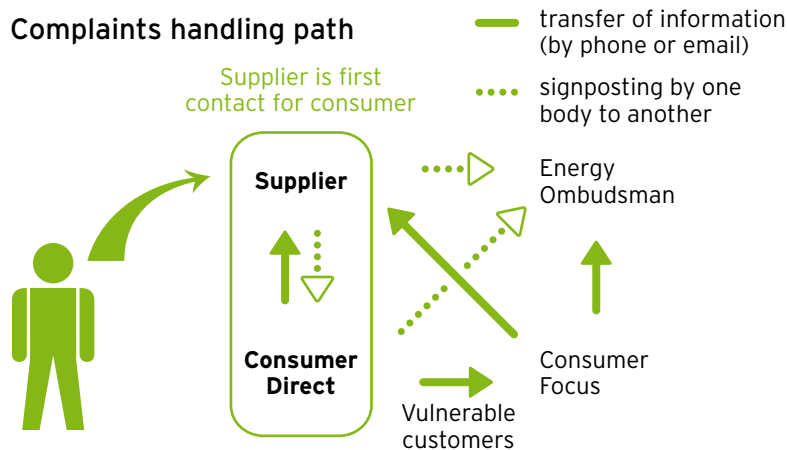
Customer representation

4. Customer representation

On the 1 October 2008 a new system that strengthened energy customers' complaints processes came into effect. Customers who have a complaint should contact their supplier in the first instance. Only if this route has been exhausted should the complainant contact the Energy Ombudsman (0845 055 0760). Vulnerable customers also have redress to Consumer Focus and they can act on their behalf.

Energy suppliers have made significant progress in reducing complaints over recent years, and have committed to a new and stringent set of complaints handling standards developed by the energy regulator, Ofgem. The Energy Retail Association's members have set a time limit of eight weeks within which they will resolve any customer complaint although complaints are often resolved more quickly.

Complaints handling path



What is the role of Consumer Direct?

Consumer Direct (08454 04 05 06) is the Government's helpline providing advice for customers by telephone and online. Consumer Direct refers all customers it identifies as vulnerable to Consumer Focus.

What is the role of Consumer Focus?

Consumer Focus has a duty to investigate complaints about cases involving actual or imminent disconnection, and has the power to investigate complaints from vulnerable customers.

What is the Energy Ombudsman?

If energy companies and customers cannot reach agreement on a complaint then independent redress schemes step in. These schemes are free for customers, but energy companies have to pay for every case that reaches this stage. The redress schemes also have the legal power to enforce resolution and award compensation to customers.

Customer services

British Gas 0800 048 0202

EDF Energy 0800 096 9000

E.ON 0845 052 0000

RWE npower 0845 071 4525

Scottish and Southern Energy

0800 048 3511

ScottishPower 0845 2700 700

What powers does the Energy Ombudsman have?

- The Energy Ombudsman settles disputes between energy companies and customers and has the power to award customers up to £5,000 in compensation.
- The redress scheme extends to micro-businesses as well as domestic customers. The Energy Ombudsman can also investigate complaints customers make about energy network companies - which transport gas and electricity to homes.

When should a customer contact the Energy Ombudsman?

If a point is reached where the supplier believes no more can be done to resolve the complaint and the customer is still not satisfied, the customer can move on to seek redress through the Energy Ombudsman. They can also take their complaint to the Energy Ombudsman if the time limit of eight weeks has been reached.

As part of the complaints handling path, Consumer Focus has a duty to investigate cases involving the disconnection of vulnerable customers. No energy supplier knowingly disconnects vulnerable customers, and seeks every avenue to avoid doing so.

Disconnection

5. Disconnection

Disconnection is always a last resort for energy suppliers and occurs most often when a customer who has fallen into debt has refused to accept a payment plan. From a high in 1986, before competition in the energy market, when 160,000 disconnections occurred, the number has fallen significantly. Suppliers will always seek to find alternatives to disconnection, such as installing a prepayment meter (PPM). Suppliers have also signed up to an agreement that no vulnerable customer will be knowingly disconnected. If a vulnerable customer is disconnected in error, suppliers will reconnect them as a matter of absolute priority.

Each supplier has their own disconnection procedures. Timings and the exact order of events differ between suppliers. Also, timings may differ between customers at the same supplier due to a customer's previous debt profile and history of contacting their supplier. However, on average, a customer will only be disconnected after there have been:



8 attempts to contact through correspondence.



2 attempts to contact by personal visit to property.



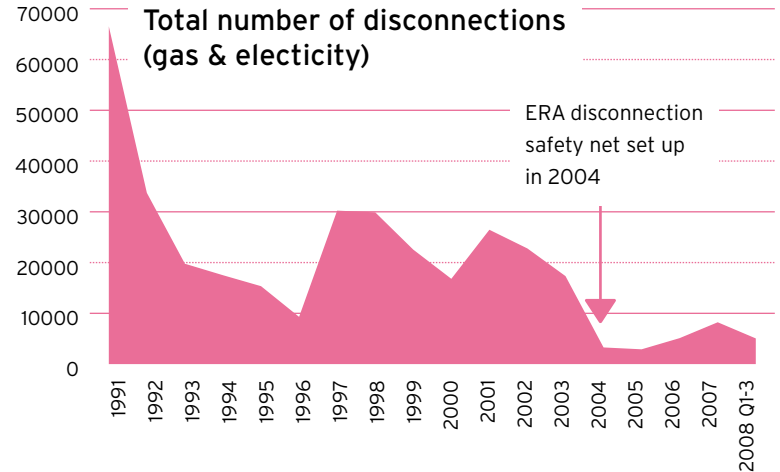
1 attempt to contact by visit to court.



2 attempts to contact by telephone.



A final attempt to contact before a warrant is executed.



What is the disconnection safety net?

The disconnection safety net is an assurance that the Energy Retail Association's (ERA) members signed up to in 2004 to ensure that no vulnerable customer would knowingly be disconnected. If a vulnerable customer is disconnected in error, suppliers have made a commitment to reconnect them as a matter of priority.

Before competition, in 1980 in London alone, there were 37,648 disconnections.¹⁴

By signing up to the disconnection safety net, energy suppliers have committed to assist vulnerable customers by:

- Attempting to capture information about their customers and identify the level of vulnerability;
- Applying the following universal definition of vulnerable:
'A customer is vulnerable if for reasons of age, health, disability or severe financial insecurity they are unable to safeguard their personal welfare or the personal welfare of other members of the household';
- Ensuring that vulnerable customers' internal records are flagged to indicate that special attention is required;
- Working with advice agencies, support services and charities to offer vulnerable customers the most appropriate help with debt;
- Putting into place dedicated specialist teams to assist vulnerable customers;
- Offering a range of debt repayment options that best meet the customer's circumstances; and
- Ensuring follow up contact with customers after payment options have been agreed.

Whilst disconnection generally occurs when a customer refuses to accept a payment plan or PPM, other customers who have difficulties paying their bills may need additional support. Energy suppliers are committed to helping their fuel poor and vulnerable customers and have a wide range of assistance that they offer.



Help for those in need

6. Help for those in need

Energy suppliers recognise that they have a responsibility to their vulnerable customers and the fuel poor. There are three main causes of fuel poverty and suppliers offer a range of support for customers who may have difficulties paying their bills.

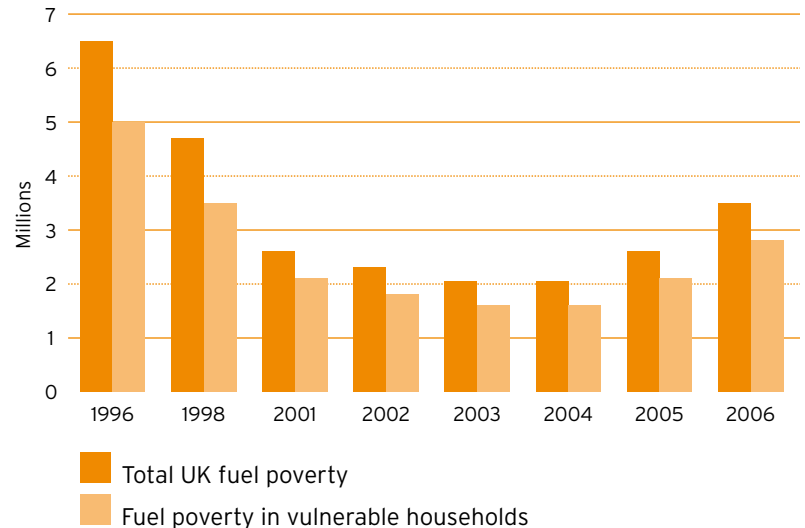
How is fuel poverty defined?

Government has defined fuel poverty as affecting those people who spend more than 10% of their income in order to heat their home to an adequate standard of warmth. Adequate warmth is generally defined to be 21°C in the main living room and 18°C in other occupied rooms during daytime hours. The Government in Westminster has a commitment to eradicate fuel poverty by 2016, and a fuel poverty strategy has been in place since 2001 to deliver this.

The three main drivers of fuel poverty are:

- Household income
- Poor quality housing
- The cost of energy

Number of people in fuel poverty¹⁵



Given its definition, fuel poverty is a moving target, with people moving in and out of fuel poverty according to changes in circumstance (such as employment status).

What is the industry's common definition of a vulnerable customer?

A customer is vulnerable if for reasons of age, health, disability or severe financial insecurity they are unable to safeguard their personal welfare or the personal welfare of other members of the household.

The cost of energy

Between 2008 and 2011 energy suppliers will spend £375 million on voluntary social programmes - including social tariffs - for their customers to help them manage the cost of their energy bills. This is voluntary and in addition to their statutory obligations.

What help is included in the industry's voluntary social spend?

In addition to social tariffs, suppliers offer:

- Other rebates or tariff discounts;
- Donations to energy trust funds to support vulnerable customers;
- Funding for partnerships with intermediaries and benefits entitlement checks;
- Energy efficiency initiatives that are additional to suppliers' statutory obligations; and
- Realignment of prepayment meter (PPM) tariffs with lower tariffs where they are targeted at fuel poor or vulnerable customers.¹⁶

What is a social tariff?

For a tariff to qualify as a 'social tariff' it must be at least the same rate as the lowest tariff offered by that supplier to a customer in the same region on an enduring basis, regardless of payment method.

How many people are on a social tariff?

In December 2008, there were about 800,000 customers on a social tariff, with total savings up by more than a third.¹⁷

Are more PPM customers in fuel poverty than those who pay by other methods?

No. Around 18% of the fuel poor pay for electricity by PPM and around 12% of the fuel poor pay for their gas by PPM.

The energy industry provides more direct help for its low income and vulnerable customers than any other.

Poor quality housing

How else do energy suppliers help their fuel poor customers?

- As part of the Carbon Emissions Reduction Target (CERT) obligations, suppliers are required to achieve at least 40% of their carbon emissions reduction in the homes of priority group customers (which includes people over 70, and households in receipt of certain state income benefits).
- The Community Energy Saving Programme (CESP) aims for savings of about £330 per year on the energy bills of householders who receive help.

Low incomes

What amount of benefits remains unclaimed?

Government figures show that £10.5 billion in income-related benefits went unclaimed in Britain in 2007-8.

What have energy suppliers been doing to help?

Suppliers have been offering benefits entitlement checks to their less well-off customers, through their own call centres and via the industry's freephone line for fuel poor customers, the **Home Heat Helpline** (0800 33 66 99). This is run by the Energy Retail Association.

Could existing schemes be focused better?

Targeting help at those that need it most is crucial - only about 12% of assistance from Government schemes, such as the Winter Fuel Payment, reaches the fuel poor.¹⁸

How can a fuel poor or vulnerable customer find out if they might qualify for help?

What is the Home Heat Helpline?

The first port of call for a fuel poor or vulnerable customer should be their energy supplier. However, if they do not want to contact their supplier directly, then they can call the **Home Heat Helpline**.

The **Home Heat Helpline** (0800 33 66 99) is the only freephone helpline that is entirely dedicated to helping people who are struggling with their energy bills. It provides a central point of contact through which specially trained advisers are able to offer advice about reducing energy costs, and to transfer the caller to the specialist team at their energy supplier. However, it is also able to direct calls - at no cost to the caller - to a number of specialised services including: Warm Front, Consumer Focus, the benefits teams at the Department for Work and Pensions, and Home Improvement Agencies (including Care & Repair).

How successful has the Home Heat Helpline been?

Since the Helpline was set up in 2005, it has received over 100,000 calls. Results so far show that:

- 38% of callers saved money on utility bills;
- 21% accessed benefits they were previously unaware of;
- 33% accessed grants to insulate their home;
- 10% registered for the Priority Service Register;
- 88% found the service a friendly place to turn to for advice.

Other available help

As well as social tariffs and other industry initiatives, there are a number of schemes which might have an impact on fuel poverty levels, including:

- The Winter Fuel Payment for households with someone aged 60 or over;
- Reduced VAT of 5% on domestic fuel bills;
- Energy efficiency investment in council housing stock;
- In England: Warm Front provides grants for energy efficiency and heating packages to private owner/occupiers;
- In Wales: the Home Energy Efficiency Scheme provides grants for energy efficiency measures; and
- In Scotland: the Energy Assistance Package provides households dependent on benefits with a package of insulation measures.

Installing energy efficiency measures is an effective way of tackling fuel poverty because it improves energy inefficient housing and reduces heating costs over the long term. Suppliers have also agreed with the Government that they will deliver several energy efficiency schemes for the able-to-pay sector in order to help people save energy, money, and also reduce carbon emissions.

Energy efficiency

7. Energy efficiency

In order to help to reduce carbon dioxide (CO₂) emissions, the energy industry is bound by statutory energy efficiency schemes, set by the Government to improve energy efficiency in Britain. Energy suppliers have agreed with Government to spend almost £4 billion on energy efficiency measures between 2008 and 2011.

Energy suppliers work closely with Government and stakeholders in an effort to offer their customers opportunities to be more energy efficient, through better insulated homes, learning about and conserving energy, and through innovative energy production methods.

What is the Carbon Emissions Reduction Target (CERT)?

CERT is the successor to the Energy Efficiency Commitment (EEC). The CERT Order established a carbon emissions reduction target (185 million lifetime tonnes of CO₂) for the period from 2008 to 2011. Suppliers must achieve 40% of emissions savings in the priority group.

What is the CERT priority group?

The priority group includes those on low incomes, people over 70, and households in receipt of certain state income benefits. The priority group makes up around 11 million households, and Government has estimated that around 60% of supplier expenditure is spent on the priority group.

What measures have been carried out in the first year of CERT?

In the first year:

- 545,594 cavity walls were insulated;
- 689, 353 lofts were insulated;
- 8,626 solid walls were insulated;
- 762 microgeneration measures were installed, including ground source heat pumps, solar water heating, and micro combined heat and power; and
- Over 150 million energy efficient light bulbs were distributed.¹⁹

What is the Community Energy Savings Programme (CESP)?

CESP aims to target households in given geographical areas across Britain to improve energy efficiency standards, and permanently reduce fuel bills. It will run until December 2012.

How much will CESP cost and how is it funded?

It is estimated that the scheme will cost £350 million and will be funded by a new, additional obligation on energy suppliers and electricity generators.

What will CESP offer?

CESP will promote a 'whole-house' approach and will be delivered through the development of community-based partnerships involving local authorities, suppliers and generators. It will also aim to take hard-pressed families out of fuel poverty by focusing on areas of disadvantage.

What does a 'whole-house' approach mean?

CESP will encourage energy suppliers and electricity generators to deliver a package of CO₂ and energy bill cutting measures in each individual home, with the aim of improving energy efficiency and lowering energy consumption for each particular household.

What is the aim of the Heat and Energy Saving Strategy (HESS)?

It is proposed that HESS will contribute to an annual emissions reduction of up to 44 million tonnes of CO₂ per year by 2020. The aim of HESS is to ensure that emissions from existing buildings will be approaching zero by 2050. This means increasing the scope and ambition of energy saving measures, as well as decarbonising the generation and supply of heat.

In its first year CERT has resulted in emissions reduction of 55.3 MtCO₂.

Energy efficiency is the most cost-effective way of reducing carbon emissions, and energy suppliers support the Government's commitment to incentivise them to embrace a market model that supports a low carbon economy. It makes sense for the industry, the Government and for energy-conscious households.

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The Energy Retail Association (ERA) was formed in 2003 and represents electricity and gas suppliers in the domestic market in Great Britain. The members of the ERA are: British Gas, EDF Energy, E.ON, RWE npower, ScottishPower, and Scottish and Southern Energy.

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July 2009