

Sustainability *first*

Sustainability First Annual Overview 2016

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Foreword from the Chair

Sustainability First is an environment think tank with the aim of exploring key sustainability issues, often those which have received less attention than they ought, principally in the areas of energy and water.

2016 was a watershed year for the sustainability agenda: new uncertainty for the future of stewardship for the climate and environment in the wake of our vote to leave the European Union, and the referendum outcome under-scoring society's urgent need to address questions of fairness, cohesion and inclusion in a meaningful way.

2016 was also an important year for Sustainability First. Our energy and water systems face unprecedented change as they adapt to climate goals, to demands of renewal and resilience and to technology and digital revolutions. Our Sustainability First projects in 2016 have each grappled with some of the fundamental public policy questions posed by these deep-seated changes. In particular, we remain firmly focused on the role of consumers, customers and citizens within this world of rapid change. In looking to safeguard our planet and environment for the future, our aim remains to help map some 'do-able' and practical next-steps - near-term and long-term – to help bring society in its broadest sense along with us.

Our major New-Pin project and Network has created a strong new voice for 'long-termism', clearly focused on what 'public interest' outcomes might be for our water and energy sectors and how to actively work toward these. Our collaboration with the Power Responsive programme continues to tackle the practical side of making the UK energy-demand-side a reality. Our Project Inspire has focused unambiguously on the most vulnerable among energy consumers - to address how innovation can better serve them.

Of course, 2016 was also a sad year for Sustainability First with the loss of our long-standing colleague Gill Owen. In 2017 we will be celebrating Gill's life with a memorial lecture. But 2016 has also been a positive year for Sustainability First. We have continued to grow as an organisation - with new projects, associates and trustees. We remain proud of our strong independent voice. But we also look to our strong working relationships - with so very many colleagues across government, regulation, companies, civil society and the consumer groups – as a corner-stone of our continued success. It is through these active and creative partnerships that Sustainability First will continue in 2017 and beyond to develop new and meaningful thinking, and which remains our core contribution to shaping a more sustainable world.

Prof Ted Cantle CBE
Chair

Sustainability First Annual Overview 2016

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1. About Sustainability First

We are an environment think-tank, rooted in experience, with a clear commitment to promoting long-term sustainability through practical thought-leadership. We work on sustainability policy and practice for:

- Energy
- Water supply and water management

Within these subject areas, we currently focus on:

- Promoting a 'public interest' agenda, focused on the inevitable trade-offs between managing near-term pressures against the need for longer-term thinking and practical actions for sustainability.
- Economic regulation and sustainability duties. In the past, Sustainability First has shaped ground-breaking thinking on new sustainability duties for the water and energy regulators. This is an area in need of continued attention.
- Innovation and how this can better serve sustainability policy and practice.
- Social justice aspects of sustainability, in particular in terms of fair treatment for vulnerable and low-income consumers and citizens, and the broad agendas for affordability and efficiency.

Sustainability First is a registered charity with independent trustees – www.sustainabilityfirst.org.uk.

Sustainability First's trustees are: Ted Cantle (Chair), Phil Barton (Secretary), Trevor Pugh (Treasurer), Derek Osborn, David Sigsworth, Derek Lickorish, Richard Adams, Sarah Deasley and Sarah Harrison.

Its projects are developed by the trustees and a number of associates and consultants, under the leadership of Sustainability First's Director, Judith Ward.

Sustainability First's associates are: Sharon Darcy, Clare Dudeney, Zoe McLeod, Jon Bird and Maxine Frerk.

2. Sustainability First – People

Trustees

Ted Cantle CBE (Chair) was one of the founding group of Sustainability First Trustees in 2000. A committed environmental champion, with a strong focus on tackling climate change, he was a member of the Board of the Environment Agency for England and Wales (from 2000 to 2008) and Deputy Chair (2005 to 2008). Ted led the Environment City bid for Leicester City Council in the late 1980s and the **Nottingham Declaration on climate change** in 2000, subsequently adopted by many other local authorities in the UK and elsewhere. Ted also founded and chairs the iCoCo foundation, an institute to promote inter-culturalism and community cohesion. He chaired the Independent Review of the riots in northern towns in 2001, was responsible for the ‘Cantle Report’ and the founding of the community cohesion programme. He was formerly chief executive of Nottingham City Council and chair of the DTI Construction Task Force for local government. Ted was appointed CBE in 2004 and is a Deputy Lieutenant of Nottinghamshire. Ted has recently spear-headed the successful multi-million bid to the Heritage Lottery fund to transform Nottingham Castle into a world class attraction.

Phil Barton was until March 2015 the chief executive of Keep Britain Tidy, the charity which campaigns for a cleaner, greener England and which runs a range of environmental programmes including EcoSchools, Green Flag Awards for greenspaces and Blue Flag beaches. Keep Britain Tidy merged with Waste Watch in 2011 and launched a new national local pride campaign: Love Where You Live. Phil formerly worked on regeneration skills for the NWDA, for Defra on rural voluntary sector policy and for Groundwork UK.

Derek Osborn CB is a senior environmentalist advising on long-term strategic issues for governments, international bodies, business and the voluntary sector. He is also president of the Stakeholder Forum for Our Common Future, and a member of other Boards in the private and voluntary sectors.

Derek has held senior roles in the arena of environmental protection: he served as director general for environmental protection with the Department of the Environment (until 1996), chaired the board of the European Environment Agency (1995-1999), and was a board member of the Environment Agency for England and Wales (1996-98), having been involved in its early set-up. He was a member of the European Economic and Social Committee from 2006 to 2010 and was the first chair of its Sustainable Development Observatory.

He currently lives in Wales and is Chairman of Cynnal Cymru - Sustain Wales.

Trevor Pugh is Strategic Director, Environment and Infrastructure directorate, Surrey County Council, and has held senior positions in a number of London boroughs. Trevor is an environmental scientist and has championed sustainability in construction and in waste policy and across the range of local authority services.

David Sigsworth is chairman of Sigma Capital Group plc (property and urban regeneration specialist), chairman of the Central Market Agency Ltd (administers the Market for water and wastewater retail services in Scotland), chairman of Bellrock Technology Ltd (delivering high-tech software to utilities for making innovative analytics operational) and chairman of Turnbull & Scott (an engineering business specialising in the generation, transfer and recovery of heat). Previously chair of the Scottish Environment Protection Agency, Flexitricity Ltd, and the Scottish Fuel Poverty Forum, he chaired the Scottish Fuel Poverty Strategic Working Group, which in 2016 advised the Scottish Government on future policy. He is a director of The Heat Trust and is a vice-president of

the Association for Decentralised Energy. A former main board director of Scottish & Southern Energy, David is an honorary Professor at the University of Dundee, involved in MSc courses covering sustainable energy and environmental modelling, as well as jointly chairing the Energy Technology Partnership in Scotland, based at the University of Strathclyde.

Richard Adams OBE is a founder of several successful UK social enterprises that allow people to express ethical values through their work, spending or saving, mostly focused on fair trade, the problems of social exclusion, fuel poverty, international development and sustainability. Richard is the British founder of the UK fair trade organisations Tearcraft and Traidcraft and was convenor of the steering committee of what became the UK's Fairtrade Foundation. He has also founded a corporate social responsibility research group and the UK's first ethical supermarket chain. He has degrees in sociology, theology and business and has a number of honorary doctorates and visiting fellowships from British universities. He is currently President of the EU's Economic and Social Committee's Permanent Study Group on a European Energy Community.

Derek Lickorish MBE has had an extensive career in the energy business. Derek spent more than six years as chair of the Government's Fuel Poverty Advisory Group (until 2015). He is honorary chair of the trustees of National Energy Action. He is a non-executive director of the Green Deal Finance Company Ltd and of Secure Meters SHPL Pte. He is a member of Ofgem's Sustainable Development Advisory Group and, RWE Npower's Customer Stakeholder Council. Derek was previously EDF Energy's Chief Operating Officer, (Customers Branch) for 5 years, and, before that the Customer Service and External Affairs Director at SWEB from 1996. He started his career as a trainee at Seaboard in 1970.

Sarah Deasley is a Director at the consultancy Frontier Economics. She has over 25 years' experience working as an economist within the energy sector with a focus on environmental policy, network regulation and the energy retail market. She is well known for her recent work on the implications of the move to a low-carbon economy, with a particular focus on smart technologies and consumer energy behaviour.

Sarah Harrison MBE became Chief Executive of the Gambling Commission on 1 October 2015. Prior to joining the Commission, Sarah was at the UK energy regulator, Ofgem, where she held a number of senior executive roles: as Senior Partner, Sustainable Development, Managing Director of Corporate Affairs and, before that, Communications Director. Before joining Ofgem in 2000, Sarah was the first Chief Executive of ICSTIS, the UK industry regulator for premium rate telephone services. Her earlier career was in government and public relations consultancy. Sarah is a Board Member of the Association of Chief Executives and a Trustee of Sustainability First. She was awarded an MBE in 2016 for services to consumer protection.

Sustainability First Director

Judith Ward has been part-time director of SF since 2012, after working for several years as an SF Associate. She is an energy policy professional with long-standing practical experience of both the utility and consumer worlds. Through Sustainability First, Judith has developed new thinking on policies for the GB energy and electricity demand-sides, and has published extensively.

Her long-term career was with National Grid (1990-2004), where her last role was a six-year period as Group Head of Public Affairs. In her early career, Judith worked in policy roles with the House of Commons Environment Select Committee and the national Electricity Consumers' Council.

Judith has a master's degree in Energy Resources Management. She was a part-time adviser to the UK Business Council for Sustainable Energy from 2005 to 2012 and was also a long-standing trustee of the Institute for European Environment Policy. Judith is an Honorary Fellow of the Energy Policy Group at the University of Exeter. Until 2016, she was a member of the former DECC / Ofgem Smart Grid Forum.

Sustainability First Associates

Sharon Darcy is a champion of consumer concerns in energy and water. Sharon was elected to the Council of Which? in January 2015 and was formerly a long-standing board member of Consumer Futures and its predecessor bodies (Consumer Focus and energywatch). A qualified accountant, Sharon began her career working on value for money studies in the privatisation and regulation team at the National Audit Office. She subsequently worked for Consumers International, the world consumer groups federation, and for Which?. Sharon is presently a Trustee of the new workplace pension provider NEST where she chairs the Risk Committee.

Since 2012, Sharon has been a lay member of the Standards Committee of the House of Commons. For the last five years, Sharon has been a member of Ofgem's panel to assess the network innovation competitions, plus a member of the Ofgem 'Consumer Challenge Group' (ensuring that the consumer interest is represented in setting prices for monopoly energy businesses). She was a member of Ofwat's Customer Advisory Panel for the 2014 water price review and the previous Ofwat Future Regulation Advisory Panel.

Previous roles also include chair of a citizens' advice bureau and member of the London and Southern Committee for the Consumer Council for Water.

Clare Dudeney currently works with Sustainability First as an associate on a number of current projects. She is an energy policy consultant and fine artist. She was Director of Strategic Policy for Energy-UK the national energy organisation from 2012-2014. Prior to that, she spent six years with one of its predecessor bodies, the UK Business Council for Sustainable Energy, the body which brought together the major energy utility companies on climate and sustainability. At UKBCSE, Clare held posts as Head of Policy and thereafter Director. Clare has a first class degree in geography & environmental studies from the University of Lancaster and a master's degree in environmental science from Kings College, London.

Jon Bird was, until March 2014, Head of Sustainability with Northern Powergrid (the electricity distribution company) and before that Head of Government Relations since 2000. Jon's role included regional and national stakeholder management on climate change and low carbon activities to assist the company in its understanding of the requirements of electricity generators and customers. He was a long-standing member of the CBI's energy policy committee and the CBI's northeast regional council. Earlier in his career, Jon spent 8 years with BNFL as Head of Government Relations, and almost twenty years with the civil service at a senior level, including in HM Treasury, DTI and the Department of Energy. He has a first class degree in mathematics from Cambridge University and a doctorate in general relativity. He is a visiting Professor of Practice at the University of Newcastle and a Fellow of the Energy Institute.

Zoe McLeod is a consumer policy and regulatory expert with a particular focus on energy, water, innovation and consumer vulnerability issues. She is the Chair of the South East Water Customer Challenge Group and a Board Member of the Bar Standards Board. She is a Director of a new social enterprise called OnTheRecord, whose aim is to make businesses better so as to save customers time and money. OnTheRecord has a strong focus on improving access to services for customers with disabilities. She has been a member of Ofwat's Expert Advisory Panel supporting the Water

2020 programme and other Ofwat programmes. She has more than 10 years' experience as a consumer champion, including working for Citizens Advice (and its predecessor bodies Consumer Focus and Consumer Futures), Ofgem, the fuel poverty charity National Energy Action, and Friends of the Earth. She has been a Non-executive Director representing consumer interests for Smart Energy GB, the organisation which leads the national smart meter rollout campaign, a representative on the Fuel Poverty Advisory Group for England (FPAG), a member of DECC's Consumer Vulnerability Task Force and Ofgem's Consumer Vulnerability Group, a consumer representative on the Smart Metering Ministerial Steering Group and a number of smart metering expert groups, including DECC's Consumer Advisory Group and those relating to consumer engagement, benefits realisation and data access and privacy, and a consumer representative on the Smart Metering Installation Code of Practice (SMICOP) panel and Chair of the Consumer Panel for the Smart Homes and Buildings Association.

Maxine Frerk has wide regulatory experience including 15 years in Ofgem in senior roles. Most recently she was a member of Ofgem's executive board responsible for all aspects of regulation of the distribution networks. She has also led on consumer policy at Ofgem and has significant experience on smart metering. This included two years in DECC as Deputy Programme Director where she led, among other things, on development of the smart meter Data Access and Privacy Framework.

3. Gill Owen

We are deeply sad at the loss of our very dear friend and Sustainability First colleague, Gill Owen. Gill died peacefully in Newcastle on 27 August 2016, having fought an aggressive brain tumour so bravely since her diagnosis in March 2014.

Gill was closely involved with Sustainability First from its early days and worked for over a decade as an Associate. She undertook extensive research and published widely on fuel poverty, energy efficiency, smart meters, distributed energy and demand side response. She led many of our projects and workshops, and authored many of our papers.

For three years up to March 2015, Gill was based in Melbourne, where inter alia she worked as a part-time senior researcher at Monash University. Gill provided advice to the Australian Energy Markets Commission and Australian Energy Regulator, where her outstanding contribution has been marked by this appreciation. When she returned to the UK, Gill continued as a member of the newly set-up Board of Energy Consumers Australia and also continued her involvement with the Consumer Challenge Panel on Network Policy. Gill was a part-time senior research associate at the Energy Institute at University College, London.

Before leaving for Australia in 2012, Gill was vice-chair of the government's Fuel Poverty Advisory Group, a non-executive director of the water regulator Ofwat and chair of the REAL consumer assurance scheme for micro-generation. Gill was a Commissioner of the UK's Competition Commission for ten years until 2002 and had also been a non-executive board member of the energy regulator, Ofgem. She continued a close involvement with Ofgem as a member of Ofgem's Social Action Strategy Review Group and Consumer Challenge Group. She was a member of DECC's Smart Meters Consumer Advisory Group (and also a member of the predecessor body run by Ofgem).

Gill continued to work closely with us from Australia, and thereafter once back in the UK. Gill's commitment to social justice, especially for the fuel poor, shone out in everything she took on. We will sorely miss her incisive common sense, her strategic view, her extensive knowledge of consumer affairs, her deep regulatory expertise and her unfailing quest to make economic regulation better,

more accountable and more sustainable. But above all, we will greatly miss Gill's distinctive contribution and collaboration as a member of our small Sustainability First team.

4. New Energy and Water Public Interest Network (New-Pin)

In July 2015, Sustainability First launched a multi-sponsor three-year project, the New Energy and Water Public Interest Network, 'New-Pin'. New-Pin brings together an active network of companies, regulators, government departments and public interest advocates with an interest in energy and water to:

- Build understanding between different stakeholders as to what the long-term public interest looks like in these sectors, helping to address particularly intractable issues in a more considered and stable way;
- Develop capacity and expertise amongst public interest advocates, ensuring a more level playing field with the views of the public more fully represented in long-term company and regulatory decisions; and
- Improve board-level understanding of the value of public engagement in these sectors and a better grasp of what successful engagement and governance in the public interest might look like.

We are very grateful to our sponsor organisations for their financial support and to all other organisations taking part and contributing to our thinking. Following workshops in 2015 on aiming to define the long-term public interest and long-term affordability, three further workshops were held in 2016 on trust and confidence, resilience, and stakeholder engagement and capacity building.

In 2017, New-Pin is looking in turn at market-led approaches to public interest outcomes, at 'future proofing' long-run decision-making for the public interest, and at company and regulatory approaches to governance for the public interest. With New-Pin's practical and inclusive approach, focused on development of a stronger 'public interest' voice, the project sits well with the government's desire to shape policy and measures in ways which work for the country as a whole, short- and long-term. Sharon Darcy leads the New-Pin project for Sustainability First. We are extremely pleased at the continued enthusiasm and engagement from among our project partners and network members – and the wider interest that New-Pin attracts.

Final papers are published on the Sustainability First website and are disseminated in both a long version, and a short 'punchy' executive summary. In 2017, we will do more on stakeholder engagement and capacity-building and also on the governance work-streams of the project.

5. 'Smart Meter Data and Public Interest Issues', an academic Research Challenge

Following an initiative from our Director, Judith Ward, TEDDINET (*Transforming Energy Demand through Digital Innovation NETWORK*, an academic research network addressing the challenges of transforming energy demand in our buildings), the Centre for Sustainable Energy and Sustainability First launched a joint 'research challenge' in summer 2015 to understand how future household smart-meter energy data might be deployed to serve the public interest. The proposal was to fund two post-doctoral students for one month to draft two short non-technical discussion papers on the possible use of smart meter data for public interest issues.

A competition was held and two able and complementary researchers were chosen to carry out the work: Simon Elam from University College, London, dealing with national issues and Jess Britton from Exeter University covering sub-national issues. They were overseen by Sustainability First jointly with the Centre for Sustainable Energy in Bristol.

The papers aimed to answer the following questions:

- What's new about smart meter data, compared to what's already out there?
- What could the smart meter data be used for in the public interest?
- What uses will be possible under the currently anticipated arrangements?
- What uses will not be possible under the currently anticipated arrangements?
- What arrangements would need to be in place to facilitate the latter?
- What are the obstacles, risks, challenges to making such arrangements?
- What practical next steps can we recommend based on this work?

The papers were published on the Sustainability First, TEDDINET and CSE web sites. In March 2016, we held a very successful workshop to discuss the findings of the papers. The papers had been designed to encourage fresh thinking, and the roundtable considered the need to identify beneficial uses of smart-meter energy data to better serve the public policy agenda – at both the national and local levels. Sustainability First and CSE are currently pursuing the possibility of setting up a new Public Interest Advisory Group which would explore in-depth how smart-meter energy data could serve the future public interest, as a part of UCL's upcoming smart meter research portal.

6. Smarter fairer?

In July 2016, we held a round-table chaired by Sustainability First Trustee, Derek Lickorish, based on a discussion paper written by our Sustainability First associate Jon Bird – 'Smarter, fairer? Cost-reflectivity and cost-socialisation in household electricity prices'. The world of half-hourly settlement and greater cost-reflection in electricity pricing will be complex, both for companies and for households. The paper argued that some basic questions about 'fairness' needed systematic and open debate if we were to evolve successfully to a world of greater cost-reflection which was demonstrably acceptable and fair to all. It is pleasing to see that more recent work by Ofgem and BEIS, including the Smart Energy call for evidence, have picked up on the need to consider distributional effects when changes to tariff structure are considered. In 2016, Sustainability First actively championed the need to set up a new multi-party standing group on household flexibility to look in the round at both the desired outcomes and potential for unintended consequences, given the rapid evolution of household smart energy.

7. Project Inspire

In October 2016, Sustainability First launched a new and significant one-year project designed to identify 'innovative-practice' case-studies to highlight how innovation can better serve energy customers in vulnerable circumstances. Project Inspire is led by our Sustainability First associate, Zoe McLeod. The project focuses on 'innovative practice' capable of improving service delivery to energy customers in vulnerable circumstances through the use of technical or other innovation, and which is demonstrably measurable and scalable. The project will also seek out non-UK and non-energy examples. A report will be published in summer 2017, show-casing case-studies selected through a 'Dragon's Den' procedure, including 'ones-to-watch', and set out main enablers and barriers to scalability. A communications programme will follow, designed to share the innovative-practice case-studies with energy companies and other organisations keen to learn and to take forward such ideas. We have been delighted at the strong interest in the project. Our sponsor group includes a

mix of energy retailers, gas and electricity networks, two product manufacturers and Ofgem. BEIS and Citizens Advice are also involved.

8. Other Sustainability First projects

a. National Grid – ‘Power Responsive’

In 2016, Sustainability First has continued to provide strategic advice to the Steering Group for Power Responsive. This is a collaborative cross-industry initiative led by National Grid to promote awareness of demand-side flexibility - initially in the industrial and commercial (I&C) sector. In its first year, Power Responsive worked with major energy users and market actors to help ‘market-make’, to promote basic awareness of demand-side opportunities and to tackle key barriers to enable greater uptake by customers of demand-side flexibility in GB power markets. Alongside support for the work programme of the steering group, Sustainability First has helped Power Responsive to deliver a number of major demand-side events, plus a very successful workshop for the NHS estate. We have also produced a simple ‘How-To’ guide for I&C customers about the DSR customer journey.

A Power Responsive Annual Report to Customers was produced, to pull together for the first time some base-line metrics, by which the success and development of GB demand-side flexibility markets can begin to be judged. The Power Responsive focus is turning to the detail of delivery: steps to simplify, make more accessible and provide more systematic and open information about demand-side markets to allow I&C customers to feel more confident about the potential opportunity for them in providing demand-side services.

Sustainability First is glad to work alongside market actors large and small, together with I&C customers, in moving forward the Power Responsive programme - which we believe has an important place in helping to establish practical and equitable demand-side solutions. Our work on Power Responsive is led by Sustainability First colleagues, Clare Dudeney and Judith Ward.

b. Tempus Innovate UK project

Sustainability First collaborated with Tempus Energy and their partners since 2014 on their two-year project: ‘The Global Electricity Revolution for Consumers’, following success in the Innovate UK Energy Catalyst competition. Sustainability First’s role was to provide expert challenge and contribute to knowledge dissemination about the project.

The project came to an early close but nevertheless provided valuable insights and lessons for the future. In May 2016, Sustainability First produced an interim paper where we looked at some of the policy and regulatory insights to emerge from the first year of this project. The paper highlighted some of the challenges encountered by market disruptors and early movers in demand-side flexibility markets, including the challenge of breaking open entrenched and complex historic rule-sets. The paper suggested that Government and regulators might look seriously at developing regulatory ‘sand-boxes’ – where, subject to some basic safeguards (technical, fair-trade, customer), a blank-sheet of paper could be permissible for certain new demand-side business experiments (for cities, for communities, for example).

9. Dissemination of research and policy inputs

During 2016, Sustainability First has continued to present the findings of its research at a range of conferences and other workshops. Sustainability First has also provided several inputs to Government and Parliamentary calls for evidence:

Evidence to the National Infrastructure Commission consultation on National Infrastructure Assessment in July 2016

Response to BEIS Call for Evidence on a smart, flexible energy system in January 2017

Presentation by Sharon Darcy on household water competition to the Westminster Energy, Environment and Transport Forum in July 2016

In addition, we have met with the CMA, BEIS (DECC) and Ofgem on a number of occasions to discuss demand side response and the implications of moving to more cost-reflective domestic electricity pricing.

10. Communication

We publish all our research papers on our web site, and proactively communicate our activities and achievements to those colleagues we work with. More widely, we use our blog and associated Twitter feed to provide short articles summarising our research findings and other topics on general sustainability interest to promote our activities to a wider audience.

Sustainability *First*

Sustainability First is a registered charity number 107899.

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