



Electricity Infrastructure Roadmap Annual Report Plan

Guide

May 2024

Energy >>

Acknowledgment of Country

IPART acknowledges the Traditional Custodians of the lands where we work and live. We pay respect to Elders both past and present.

We recognise the unique cultural and spiritual relationship and celebrate the contributions of First Nations peoples.

Tribunal Members

The Tribunal members for this review are:

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The Independent Pricing and Regulatory Tribunal

IPART's independence is underpinned by an Act of Parliament. Further information on IPART can be obtained from [IPART's website](#).

Contents

1	Introduction	4
2	Purpose of the annual report to the Minister	5
3	Annual report process	6
4	IPART's approach to the annual report	7
4.1	Letter to request report	7
4.2	Information required by the Minister	7
4.3	Reports from the entities	7
4.4	Information request	7
4.5	Fact-checking	8
4.6	Annual report to the Minister and publication	8
4.7	Feedback discussion	8
4.8	Review of annual report plan	8
4.9	Catch-up meetings	9

1 Introduction

Roadmap entities must each provide the Independent Pricing and Regulatory Tribunal (IPART) with a report on the exercise of their functions under the *Electricity Infrastructure Investment Act 2020* (EII Act) during the financial year.¹ Entities must provide the report to IPART as soon as reasonably practicable after the end of each financial year,

We have prepared this Annual Report Plan as a guide to assist Roadmap entities to provide their report to us. This plan contains an overview of our annual report process, key dates, and our general approach in preparing the annual report to the Minister.

IPART must submit an annual report to the Minister on the exercise of functions by the Roadmap entities by 31 October.² The report will cover the exercise of functions by the:

- Consumer trustee
- Infrastructure planner
- Financial trustee³
- Regulator
 - Australian Energy Regulator (AER)
 - Environment Protection Authority (EPA)⁴
 - IPART.⁵

Roadmap entities should seek clarification from us if they have any queries. We may provide specific advice to Roadmap entities or make appropriate changes to improve our plan.

¹ EII Act, s 70(1).

² EII Act, s 70(4).

³ The financial trustee administers the scheme financial vehicle (SFV).

⁴ Subject to the EPA's pending appointment under section 64(1) of the EII Act.

⁵ EII Act, s 70(2).

2 Purpose of the annual report to the Minister

During the early stages of the Roadmap rollout, we consider that the purpose of the annual report is to provide the Minister and the public with a factual account of functions performed by the entities during a financial year. The purpose is likely to remain the same in the short term.

As the Roadmap progresses, and we collect further performance information on the entities in carrying out their functions through audits, we intend to include more extensive analysis in the annual report. We may request entities to report their progress in addressing the performance audit recommendations as part of their annual report submission. We will update this Annual Report Plan from time to time to reflect changes in the report and our expectations.

3 Annual report process

This section sets out the annual report process that applies to all Roadmap entities in preparing their report to IPART, and the process we will undertake to prepare the annual report to the Minister.

Table 1 Overview of the annual report process

Step	Responsible party	Due date	Milestone
1	IPART	Early May	IPART writes to entity requesting entity's annual report, which may include a Ministerial information request to the entity.
2	Entity	Mid-August	Entity submits report to IPART.
3	IPART	Mid-September	IPART prepares draft annual report and may request entity to provide further information or clarifications.
4	IPART	Late September	IPART provides draft annual report to entity for fact-check.
5	Entity	Early October	Entity fact-checks IPART's draft annual report (2 weeks) and provides comments to IPART.
6	IPART	31 October	IPART prepares and submits final annual report to the Minister.
7	IPART	Mid-November	IPART publishes annual report to the Minister on our website.
8	IPART	End of November	IPART organises feedback discussion with entity .
9	Entity	Mid-December	Entity provides feedback to IPART to improve the annual report process.

4 IPART's approach to the annual report

4.1 Letter to request report

We will write to entities to initiate the annual report process. The letter will request a report from each entity on the exercise of their functions in the reporting financial year. The letter will:

- include a 'table of functions' document to help entities report against each of their functions
- specify what we require in the report
- specify what the Minister requires in the report (see section 4.2)
- provide our contact information for submitting the report
- provide the expected due date for the entity's report.

We will offer to organise a meeting with entities to discuss the reporting requirements and address any questions that entities may have.

4.2 Information required by the Minister

We will include any information required by the Minister⁶ in the letter of request to the entities. If we receive the Minister's information request after the letters have been sent, we will issue a separate request to the entities to include the required information in their report.

4.3 Reports from the entities

We expect the entities to use active voice in their report. This will minimise potential misunderstanding of who has undertaken certain functions. For example, 'Entity ABC prepared a recommendation to the Minister', rather than 'A recommendation was prepared to the Minister'.

We expect entities will submit their report to the contact information that we provide, by the due date specified in the letter.

If entities are unable to submit their report by the due date, please contact us as soon as possible. We may be able to consider entities' individual circumstances. Please note that late submission of reports will affect the overall delivery of the annual report to the Minister. This may reduce the time available for entities to fact-check the draft annual report before being finalised.

4.4 Information request

We may follow up with subsequent information requests or seek clarifications from the entities after receiving the submitted reports.

⁶ EII Act, s 70(3).

4.5 Fact-checking

We will provide our draft annual report to entities for fact-checking before we finalise the report to the Minister. The time available for fact-checking will generally be 2 weeks, therefore we would like to focus on material changes only. We will specify the due date in our communication.

We request that entities undertake fact checking to identify any errors and propose corrections including:

- inaccurate facts related to the entity
- incorrect interpretation of entity's report
- misleading or potentially misleading statements.

We do not expect entities to provide comments on:

- editorial changes such as grammatical, formatting, or stylistic suggestions
- expression.

4.6 Annual report to the Minister and publication

We must submit our annual report to the Minister by 31 October. Our report to the Minister will include a summary of the functions exercised by each entity, in the reporting year. The report will also include the completed table of functions from each entity.

After we submit the report to the Minister, we will publish our annual report on our website. We will notify entities of our published annual report.

4.7 Feedback discussion

We will organise feedback discussions with the entities, which could be in the form of a meeting or email exchange. This is an opportunity for entities to provide feedback to IPART so we can improve our annual report process. IPART may also provide feedback to entities, on matters such as fact-checking or entity's report, if entities would find it useful.

4.8 Review of annual report plan

We may review our annual report plan after receiving feedback from entities. We will put the latest copy of the annual report plan on our website and notify entities of any key changes.

4.9 Catch-up meetings

We will organise quarterly, or other agreed frequency, catch-up meetings with operational entities⁷ to obtain updates on the exercise of their functions and address any queries that they may have. This could help the entities and IPART to prepare for the annual report by spreading the workload across the year. The catch-up meetings may also include other topics for discussion, if identified by IPART or entities.

⁷ The operational entities in the Roadmap are the consumer trustee, infrastructure planner, financial trustee, and scheme financial vehicle.

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