ENERGY TRANSITION FRAMEWORK

NZ Energy Policy Survey

Analysis of 60 responses ranking 22 policies across three outcomes

60 responses

5 stakeholder groups

22 policies

3 outcomes

Aggregate, anonymised results · ranked by combined essential and partially essential support · June 2026

What was asked, and how it is measured

- 22 policies under three outcomes: Clean Growth, A Secure System, Affordable Energy.
- Each rated Essential, Partially essential, Optional, or Not recommended.
- Policies are ranked by combined Essential and Partially essential responses (support).
- 60 responses, tagged to five stakeholder groups for group analysis.
- Responses are anonymous and reported only in aggregate.

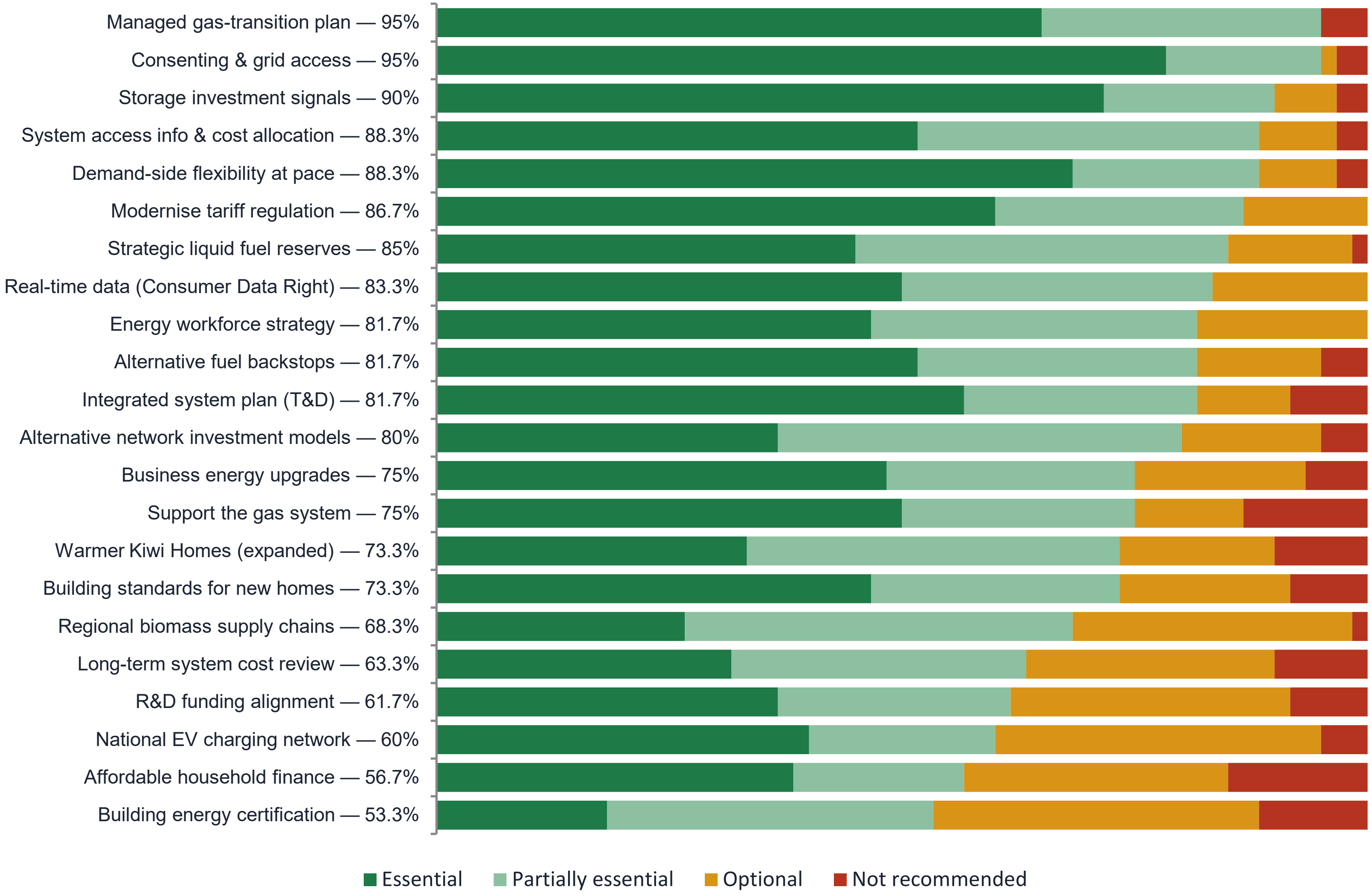
Out of scope: market structure

“This policy set focuses only on policies that can be implemented regardless of market structure. Structural reform, including generator-retailer separation, market design and ownership models, is a separate and legitimate debate. Keeping it separate makes the survey results more broadly endorsable and more useful to any incoming government.”

Survey scope statement. Structural reform or competition was raised in 5 of the 34 written suggestions (slide 10).

FULL RESULTS

22 policies ranked by support (essential + partially essential)

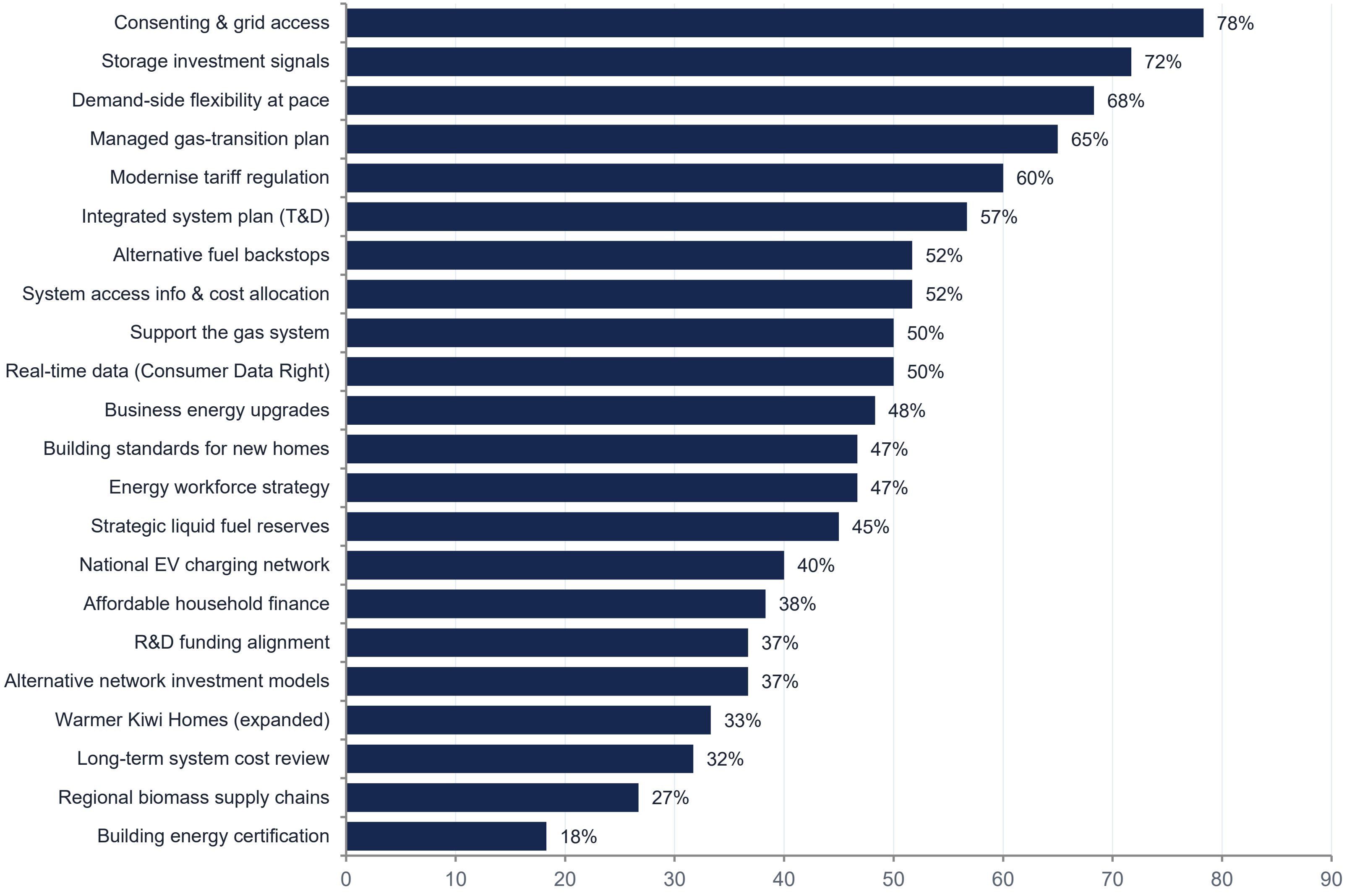


Key take-outs

- 12 of 22 policies have support of 80% or higher.
- Three reach 90%+: consenting and grid access and a managed gas-transition plan (both 95%), and storage investment signals (90%).
- The four lowest: building energy certification (53%), affordable household finance (57%), national EV charging (60%) and R&D funding (62%).

STRENGTH OF CONVICTION

Share rating each policy “essential”

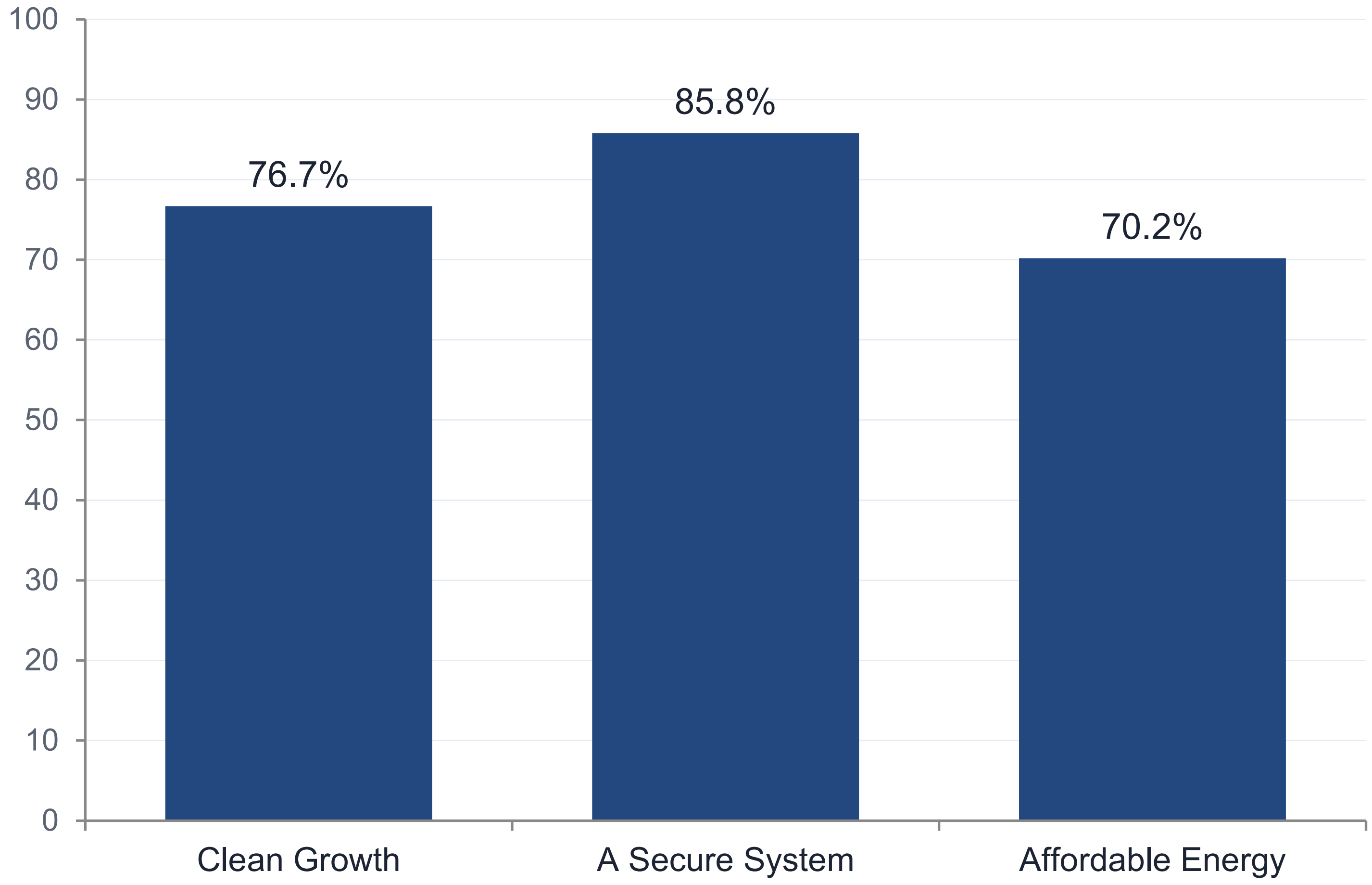


Key take-outs

- Consenting and grid access has the highest essential share (78%).
- Some widely supported policies are more often rated partially essential than essential: strategic liquid fuel reserves (85% support, 45% essential), system access information (88% / 52%) and real-time data (83% / 50%).
- Building energy certification has the lowest essential share (18%).

BY OUTCOME

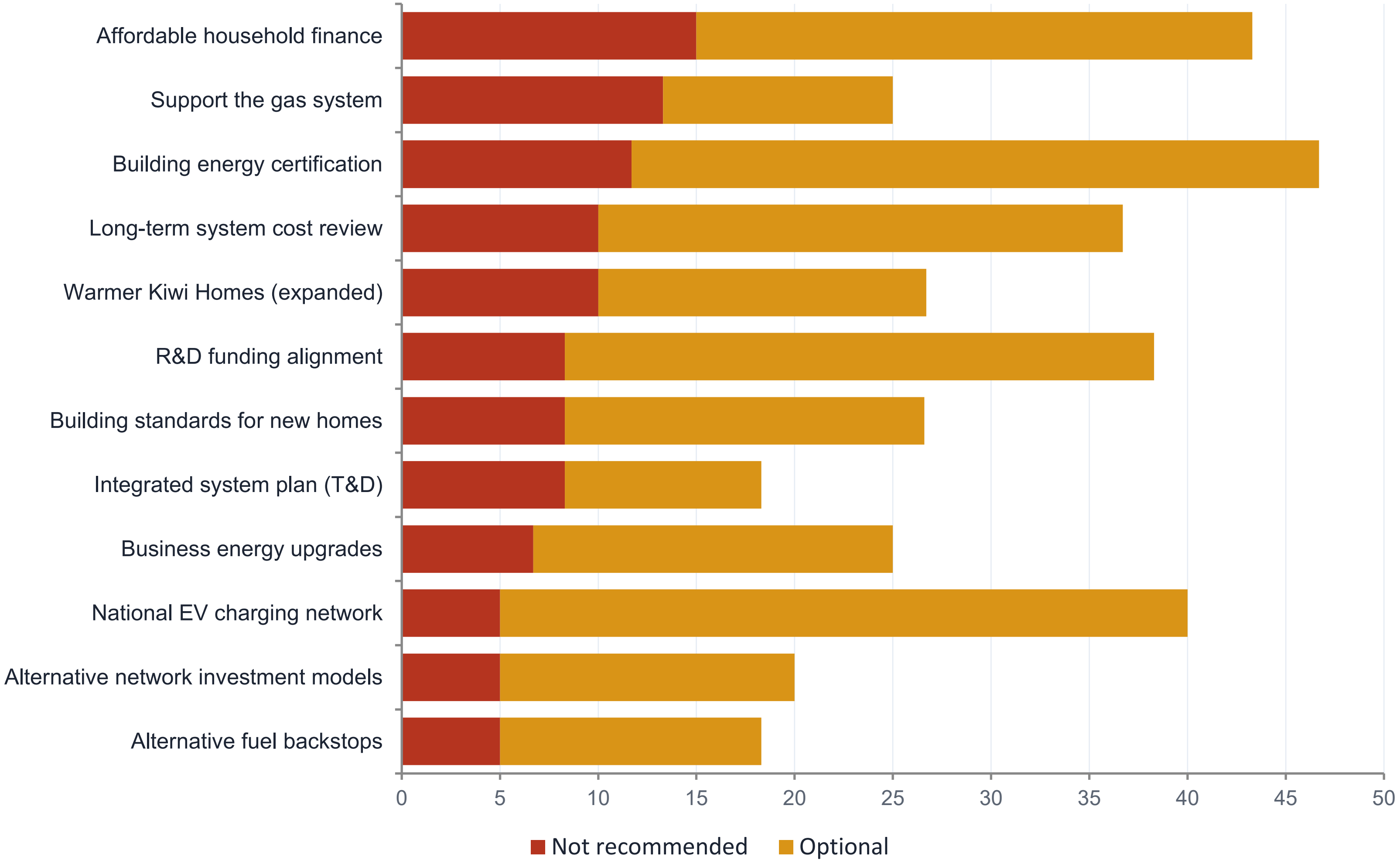
Average support by outcome



Key take-outs

- A Secure System is the most supported outcome (86%), ahead of Clean Growth (77%) and Affordable Energy (70%).
- All six secure-system policies sit in the top half of the overall ranking.
- Affordable Energy contains four of the five lowest-supported policies.

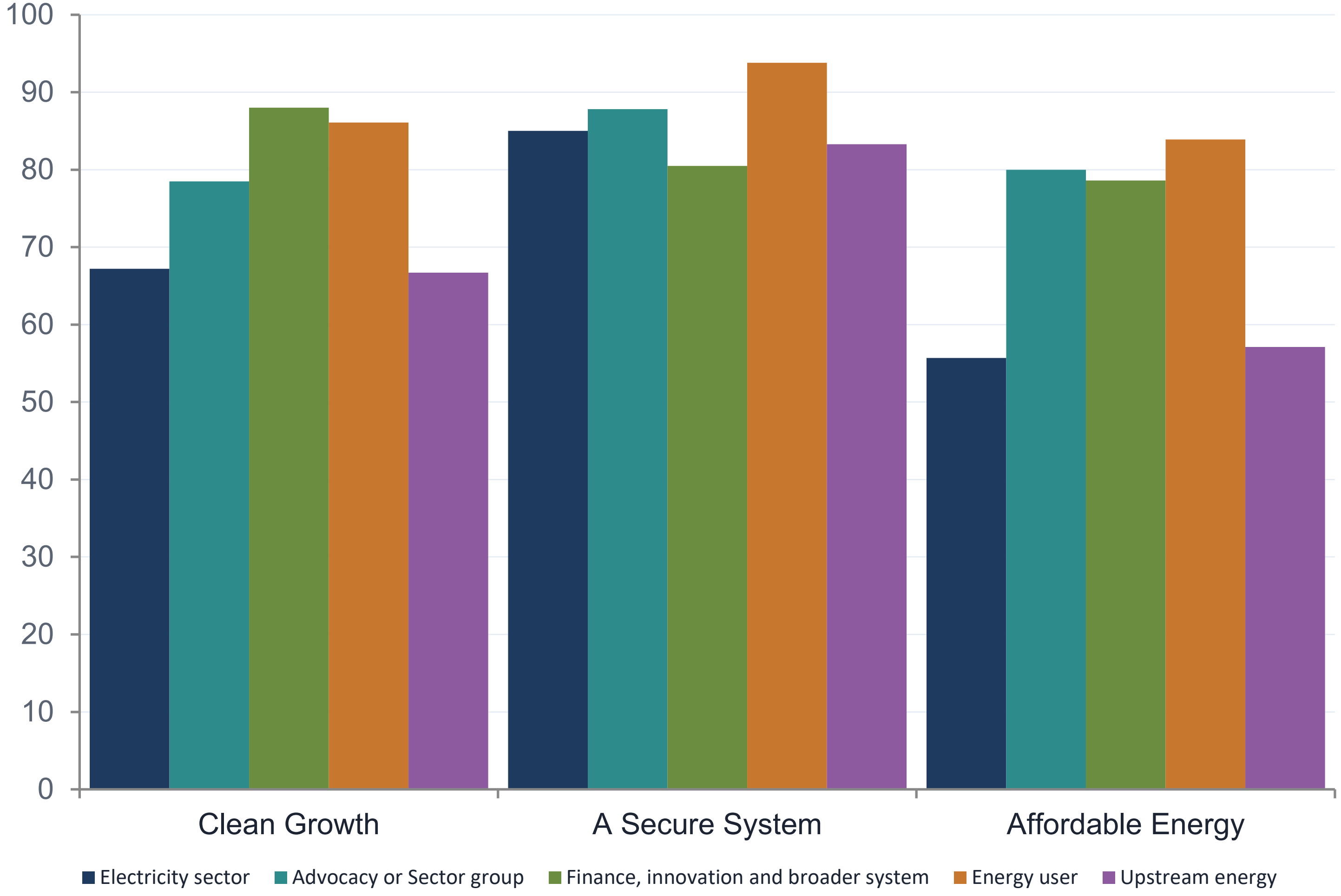
Policies with the most "not recommended" ratings



Key take-outs

- Not recommended ratings are low overall; no policy exceeds 15%.
- Highest: affordable household finance (15%), supporting the gas system (13%) and building energy certification (12%).
- Three policies have zero not-recommended ratings: modernise tariff regulation, real-time data and energy workforce strategy.

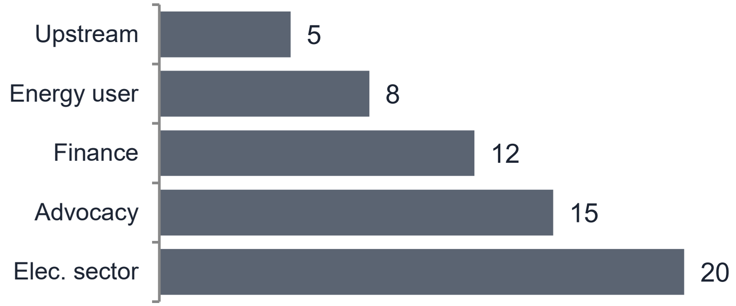
Average support by outcome, by group



Key take-outs

- Every group supports A Secure System most (83–94%).
- Affordable Energy varies most by group: energy users (84%) and advocacy (80%) versus the electricity sector (56%) and upstream energy (57%).

Responses by group

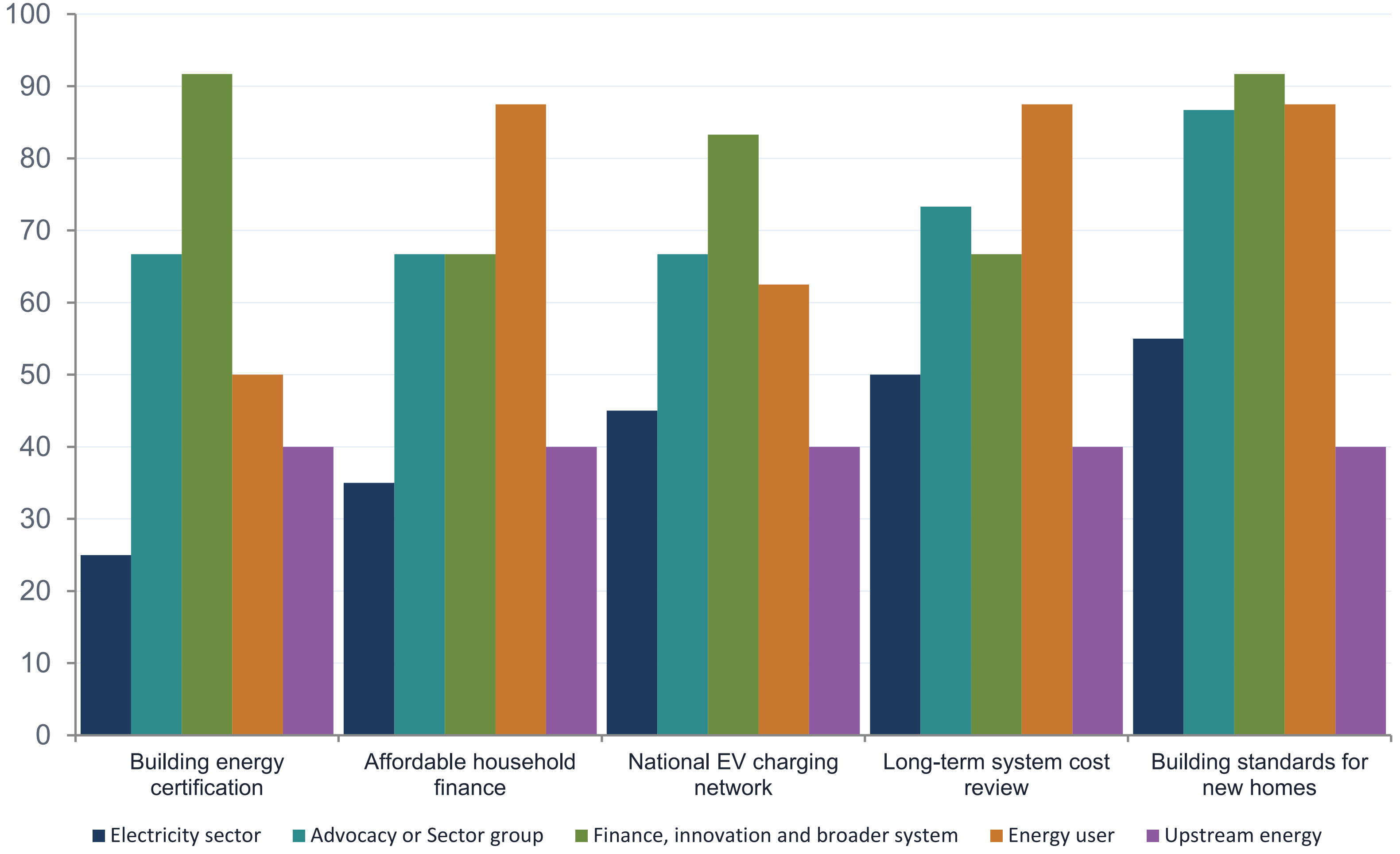


Policy support by group (essential + partially essential, %)

Darker green = higher combined support. Policies ordered by all-respondent support.

Policy	All (60)	Elec. sector (20)	Advocacy (15)	Finance (12)	Energy user (8)	Upstream (5)
Consenting & grid access	**95**	100	80	100	100	100
Managed gas-transition plan	**95**	95	93.3	91.7	100	100
Storage investment signals	**90**	90	86.7	83.3	100	100
Demand-side flexibility at pace	**88.3**	90	100	75	100	60
System access info & cost allocation	**88.3**	80	86.7	100	100	80
Modernise tariff regulation	**86.7**	70	100	91.7	100	80
Strategic liquid fuel reserves	**85**	75	80	91.7	100	100
Real-time data (Consumer Data Right)	**83.3**	80	80	75	100	100
Integrated system plan (T&D)	**81.7**	80	80	83.3	100	60
Alternative fuel backstops	**81.7**	80	93.3	83.3	75	60
Energy workforce strategy	**81.7**	65	93.3	100	87.5	60
Alternative network investment models	**80**	75	73.3	91.7	87.5	80
Support the gas system	**75**	80	73.3	58.3	87.5	80
Business energy upgrades	**75**	65	86.7	75	100	40
Building standards for new homes	**73.3**	55	86.7	91.7	87.5	40
Warmer Kiwi Homes (expanded)	**73.3**	65	86.7	83.3	62.5	60
Regional biomass supply chains	**68.3**	55	80	75	75	60
Long-term system cost review	**63.3**	50	73.3	66.7	87.5	40
R&D funding alignment	**61.7**	50	60	66.7	75	80
National EV charging network	**60**	45	66.7	83.3	62.5	40
Affordable household finance	**56.7**	35	66.7	66.7	87.5	40
Building energy certification	**53.3**	25	66.7	91.7	50	40

Policies where groups diverge most

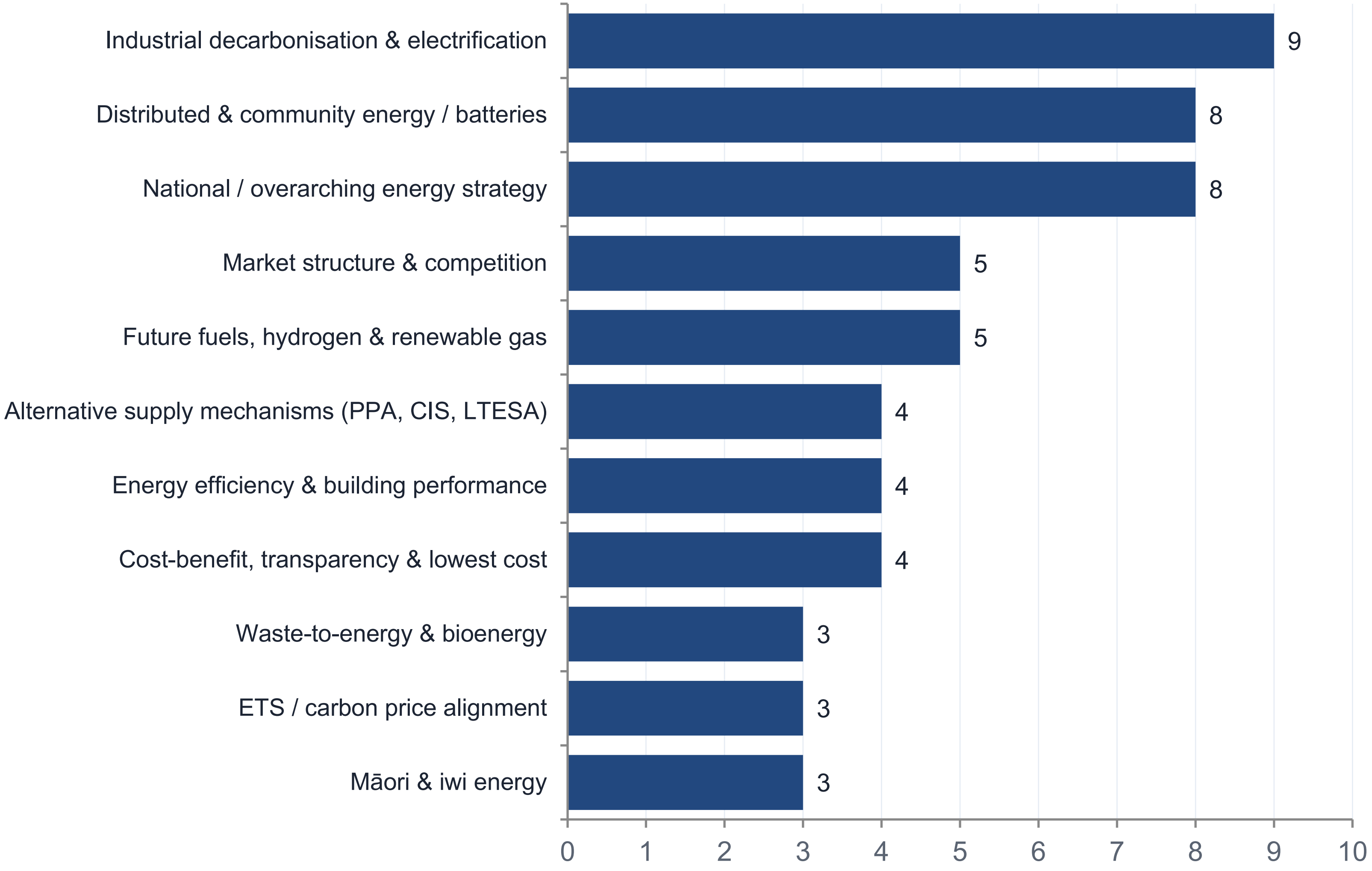


Key take-outs

- Divergence concentrates in affordability, building and demand-side policies.
- Building energy certification shows the widest gap: finance 92% versus electricity sector 25%.
- Most uniform across all groups: a managed gas-transition plan, supported by at least 92% in every group.

SUGGESTED ADDITIONS

Most frequently suggested additional policies



Key take-outs

- 34 of 60 respondents suggested additions. Suggestions often touch more than one theme.
- Most frequent: industrial decarbonisation and electrification (9), a national or overarching energy strategy (8), and distributed and community energy and batteries (8).
- Market structure or competition was raised in 5 of the 34 suggestions.