THE CENTRE FOR INDEPENDENT STUDIES

Analysis Paper 31
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Renewables offer economic development potential for Indigenous communities

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Introduction

Australia's electricity and energy industries are transitioning in response to political, policy, financial and consumer forces calling for actions to reduce greenhouse gas (GHG) emissions and human impacts on climate change. This transition provides an economic development opportunity for Indigenous people in regional and remote communities.

Indigenous people, and critically, the organisations created to determine and manage land from native title processes, potentially have access to vast tracts of land that could provide the opportunity for Indigenous people to be involved in the large-scale renewable energy industry. The level of this opportunity would require further analysis to map renewable energy resource strength to Indigenous land holdings — and explore the challenges of proximity to the grid — but is estimated to present important economic potential.

This paper provides context to the current Australian renewables environment relevant to this opportunity, outlining Indigenous people's current interactions with renewable energy projects in regional and remote communities, and highlights the potential — and challenges.

Overview of Australia's current electricity supply

Australia's current electricity supply arrangements are an outcome of history, natural endowments, government policy and significant financial investment. Natural endowment explains why Australia's electricity system is dominated by cheap coal-fired steam generation transported over long distances; which was first built and operated by governments (until more recently when privatising government owned assets became politically acceptable).

With the current energy transition, substantive government policies (emission reductions, green energy, direct and indirect investments in renewables) are supporting the move away from fossil fuels to low operating cost renewables. Given the material impact of government policies and Indigenous peoples' interests in significant tracts of land suitable for large scale renewable energy assets (for example solar and off-shore wind) there is an opportunity in which government energy policy settings have the potential of improving economic opportunities for remote and regional Indigenous communities sorely in need of development.

Australia's electricity industry consists of four separate interconnected electricity systems as well as regional and remote electricity systems. The four interconnected electricity systems include:

- National Electricity Market or NEM (QLD, NSW, VIC, SA, TAS)
- Northern Territory Electricity Market (Darwin – Katherine)
- Wholesale Electricity Market (South-West Interconnected System in Perth), and
- North West Interconnected System in the Pilbara, WA.

For remote and regional electricity systems, they operate either as micro-electricity systems dominated by diesel or as simple stand-alone power systems.[1] In 2020/21, over 3,400 megawatts (MWs) of large-scale solar and wind generation capacity entered the NEM, mostly in NSW and Victoria. There was also record investment in rooftop solar photovoltaic (PV), with almost 2,500 MWs of new capacity installed across the NEM over the same period.

This new entry drove record levels of wind and solar generation in 2020/21, accounting for over 19% of total electricity generation. Wind output exceeded gas generation for the first time. While wind and solar generation has increased, fossil fuel generation continues to supply over 70% of energy in the NEM – but this is declining. The balance of around 10% was met by hydro generation.

Over the next two decades, 15 gigawatts (GWs) of thermal generation (61% of the current coal fleet in the NEM) is expected to retire. Over the same period, 26–50 GWs of new large-scale wind and solar capacity is forecast to come online, along with 13–24 GWs of rooftop solar PV capacity. The transfer from centralised to a more distributed supply also opens opportunities for communities to participate in the renewable energy industry.

1 https://www.aer.gov.au/publications/state-of-the-energy-market-reports/state-of-the-energy-market-2021, provides an excellent overview of Australia's electricity and gas markets and systems.

Government funded policies and actions for renewable electricity

As the energy transition accelerates, causing fundamental changes to electricity supply systems, the role of government seems to be increasing, particularly in the form of direct funding of specific technology and projects. This presents an opportunity to ensure that government policy supports Indigenous communities' economic development. In many respects, there are important government policies focused on supporting Indigenous businesses (such as procurement spend targets for sourcing from Indigenous businesses). Were there to be greater coordination between these existing policies and the government's increasing role in renewable energy, it is likely to provide greater opportunities enhancing economic development outcomes. And where Indigenous communities and business had access to land suitable for renewable energy projects and associated infrastructure, the overall potential would be increased.

Electricity and energy are essential services and subject to continued focus by political institutions where the principal focus is on reliability and security of supply at affordable prices to industry and consumers. As a result, the energy industry and electricity sector are often the beneficiaries of significant government subsidies — sometimes direct, but often indirect — where governments set policies and apply schemes requiring participants to meet particular requirements.

Currently there are a range of commonwealth and state level emission reduction programs providing financial and non-financial incentives and/or penalties for renewable generation. In aggregate, these schemes are estimated to provide for around $6 to $8 billion in value, and include:

1. **Direct funding, financing and services** which provide direct funding, financing and/or services**:**
    a. Commonwealth level:
        i. Energy programs including: Business Energy Advice Program; Energy Efficient Communities Program; Grid Reliability Fund; Hotel Energy Uplift Program; Powering Communities Program; Regional and Remote Communities Reliability Fund; Supporting Reliable Energy Infrastructure Fund; and Underwriting New Generation Investment Program
        ii. Research and Development Tax Incentives under the income taxation system
        iii. Instant Asset Write-Off for business with less than $5 billion in turnover or total income can immediately deduct the full cost of eligible depreciable assets of any value until 30 June 2023[2] Backing Business Investment (BBI)
        iv. Clean Energy Finance Corporation (CEFC) is a statutory authority formed to 'facilitate increased flows of finance into the clean energy sector and provides the finance through a range of programs
        v. Australian Renewable Energy Agency (ARENA) is a statutory authority with the purpose to support the global transition to net zero emissions by accelerating the pace of pre-commercial innovation, to the benefit of Australian consumers, businesses and workers
        vi. Business Energy Advice Program which provides advice to small businesses through free services
    b. State and territory level:
        i. New South Wales provides tailored programs, management tools, training services and discounts and incentives for business to reduce energy consumption through Environmental Upgrade Agreement which uses private finance
        ii. Queensland energy efficiency information and programs including grants to help businesses become sustainable
        iii. Victoria has a range of options to assist businesses to cut costs and boost productivity by saving energy and materials through advice and grants
2. **Mandatory obligation schemes** where legislative arrangements require liable entities (largely targeting energy retailers) to meet certain objectives and targets in relation to energy efficiency or renewable energy use. Some schemes enable trading of certificates from eligible activities bought by liable entities which incentivises energy participants to invest in clean energy initiatives. The schemes include:
    a. **National**: the Large-Scale Renewable Energy Target (LRET) Scheme including small scale renewable energy targets where energy retailers must ensure that their energy purchases are from a target level of renewables which allows eligible renewable energy projects to create LRET certificates or LGCs and SGCs.

2 ATO https://www.ato.gov.au/Business/Depreciation-and-capital-expenses-and-allowances/Simpler-depreciation-for-small-business/Assets-and-exclusions/

b. ACT has the Energy Efficiency Improvement Scheme (EEIS) which requires electricity retailers to undertake eligible activities such as funding appliance upgrades and providing information to consumers to lower bills.

c. NSW has the Energy Saving Scheme (ESS) that provides incentives to companies to undertake eligible projects that either reduce electricity consumption or improve the efficiency of energy use by requiring electricity retailers and other liable parties to purchase and surrender Energy Savings Certificates to meet energy efficiency targets that are calculated in C02 tonnes equivalent.

d. South Australia has the Retailer Energy Efficiency Scheme (REES) which requires energy retailers to help households and businesses save on energy use and costs and lower their greenhouse emissions.

e. Victoria has the online Victorian Energy Upgrades Registry (VEU) to facilitate the registration and trading of VEECs.

The potential for Indigenous people and communities in the electricity industry

In exploring the business potential for Indigenous people and communities to become involved in the renewable energy industry, it is instructive to look at Indigenous people and communities' current awareness of, and interaction with, the industry.

Indigenous communities' domestic take-up of renewables

Over three million Australian households have solar panels on their roofs. Almost all solar panels installed to date have been heavily subsidised through various programs and schemes by commonwealth (small scale renewable energy certificate scheme) and state government schemes, ie feed-in-tariff schemes, albeit with the largest subsidies having been provided some ten years ago.

Accessing the subsidies to put solar panels on your house requires owner-occupancy, and is more likely where the owner-occupier has no mortgage. These households are often in the highest income and wealth cohorts but still attract non-means tested green subsidies.

In contrast, levels of owner-occupancy for non-remote Indigenous households are lower than non-Indigenous, and for remote Indigenous households there are very low levels of owner-occupancy due to historic land tenure and public housing programs. In addition, for remote Indigenous households, it is rare to allow solar panels on households for a range of reasons which have not been made clear publicly[3].

Suffice to say electricity supply to remote Indigenous communities is dominated by governments for instance:

- regulating how public housing is delivered, for instance building code requirements[4] local governments and state agencies on town planning approvals
- through government owned energy corporations who act as the monopoly service provider to the communities[5] and government owned non-regulated energy corporations that offer services to remote Indigenous communities
- via government owned investment vehicles with privately owned energy service providers offering services to remote energy users, including mines and communities
- through commonwealth grant programs to study how renewables can be added to remote power systems, and
- in some instances the provision of direct operating subsidies from governments to the monopoly service providers to ensure electricity bill parity between urban and remote communities.

An households' (Indigenous and non-Indigenous alike) ability to follow through on any green and low emissions buying intentions is impacted by household income formation.[6] The following figure compares non-remote Indigenous household income cohorts with non-Indigenous income since 2002 on a median equivalised weekly basis.

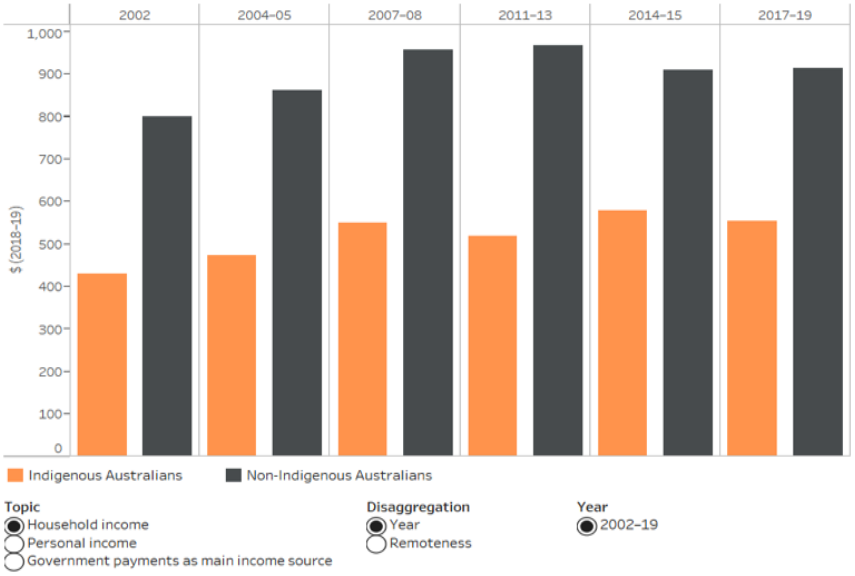
3 https://www.pv-magazine-australia.com/2021/12/20/nts-first-publicly-owned-finally-house-granted-access-to-rooftop-solar/

4 https://www.hpw.qld.gov.au/__data/assets/pdf_file/0020/5555/designconstructionstandardsremotehousing.pdf

5 Western Australia – Horizon Power, Northern Territory – Power Water Corporation and Indigenous Essential Services, Queensland – Ergon Energy Networks Limited a subsidiary of Energy Queensland Limited, New South Wales – Essential Energy, South Australia – Cowell Electric under contract with the Department of Mines and Energy.

6 https://www.acoss.org.au/wp-content/uploads/2017/07/ACOSS_BSL_TCI_Empowering-households.pdf

Figure 1: Non-remote Indigenous household equivalized median weekly income comparison non-Indigenous households[7]

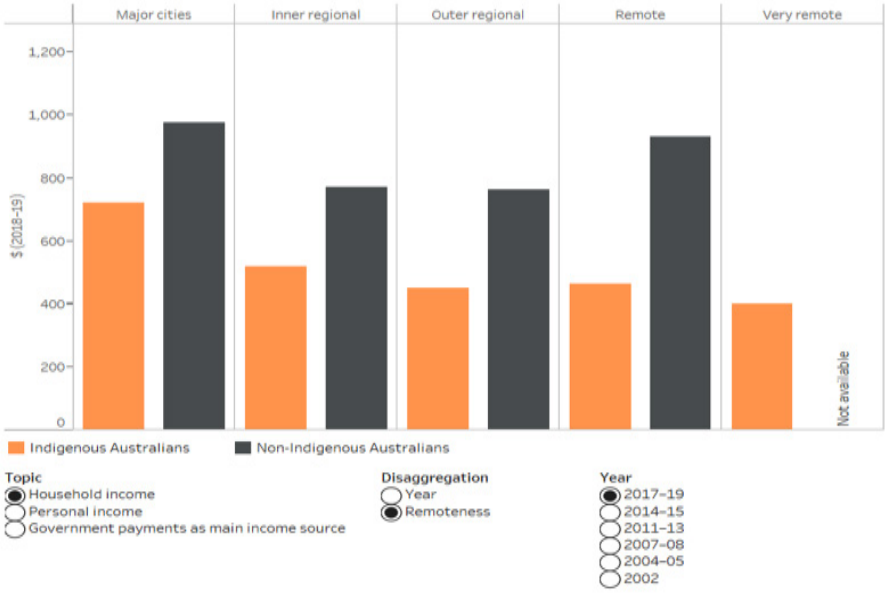


Source: AIHW analysis of ABS 2016a, 2016b, 2019b, 2019c, Steering Committee for the Review of Government Service Provision (SCRGSP) 2020.
https://www.aihw.gov.au

[Notes]

Similarly, the following figure compares remote Indigenous household income cohorts with non-Indigenous income for 2017-2019 on a medium equivalised weekly basis across geographic locations.

Figure 2: Remote Indigenous household equivalized median weekly income comparison non-Indigenous households[8]



Source: AIHW analysis of ABS 2016a, 2016b, 2019b, 2019c, Steering Committee for the Review of Government Service Provision (SCRGSP) 2020.
https://www.aihw.gov.au

[Notes]

7 https://www.aihw.gov.au/reports/australias-welfare/indigenous-income-and-finance

8 https://www.aihw.gov.au/reports/australias-welfare/indigenous-income-and-finance

The other critical determinant impacting on Indigenous households' interactions with their electricity supply is housing design and provision. Generally, the research into the impact of housing shows that the current approach to design and building does not take into account specific needs of Indigenous families and these impact living conditions and standards, which negatively impact on the interactions with electricity supply.[9] Furthermore, in their latest release on Indigenous Housing dated 16 September 2021, Australian Government's Australian Institute of Health and Welfare reported that 1 in 5 Indigenous households were living in substandard dwellings, with lack of access to secure and reliable electricity as a concerning feature.

Business and employment opportunities for Indigenous organisations and communities

For Indigenous owned and operated organisations, Supply Nation has four registered / certified organisations providing carbon type services such as environmental services and there are 19 registered / certified organisations providing energy and renewable energy services across Australia.[10] Critically for the commonwealth and state governments, as well as corporate Australia, setting targets for procurement sourced from Indigenous businesses represents another economic opportunity for Indigenous people. Finally, the other important interactions that Indigenous people have with the energy industry are through being employed in these industries.

From the 2016 ABS census, Indigenous employment in relevant industries was as follows:

- Electricity, gas, water and waste water services: 1,919 (up from 1,651 in 2011)
- Construction: 16,163 (up from 11,753 in 2011)
- Professional, scientific and technical services: 5,063 (up from 3,982 in 2011), and
- Public Administration and safety: 19,974 (up from 18,731 in 2011).

The electricity, gas, water and waste water services category represents the most direct measure of Indigenous employment participation in energy supply, and the indirect measure would be to look at the public administration and safety employment levels. The approximately 2,000 Indigenous people employed in the energy industry, this represented around 1.5% of total employees. If we looked to the levels of employment of Indigenous people in say the commonwealth Department of Industry, Science, Energy and Resources (DISER) as a bell-weather indicator for the public administration and safety cohort the DISER's 2020-21 Annual Report shows that out of approximately 3,090 employees there are 62 Indigenous employees or around 2%. It is expected that these current levels of Indigenous employment will remain in the energy industry through the energy transition, however, for employees working in this industry there is likely to be the need for the coordinated development of new skills and capabilities.

In addition, there are several organisations which are government, semi-government and not-for-profit organisations that have a primary focus on Indigenous people and then have sub-programs focused on renewable energy and emissions reduction, or a primary focus on renewable energy/emissions reduction and sub-programs focusing on Indigenous participants. More recently, organisations are being formed that look at increasing the role of Indigenous people in renewable energy and emissions reduction. We will consider these types of organisations through looking at some case studies focusing on:

- 'Quasi-peak' organisations that are not-for-profit:, such as the Aboriginal Carbon Foundation (AbCF), Indigenous Carbon Industry Network (ICIN), and the First Nations Clean Energy Network (FNCEN); and
- Government owned or legislated Indigenous organisations, such as Indigenous Business Australia (IBA).

The Aboriginal Carbon Foundation (AbCF) was established in 2010 as a not-for-profit organisation that supports "…carbon farming projects, led by Indigenous rangers … connects Aboriginal communities who supply carbon credits, with organisations seeking to offset their carbon pollution and provides training for Indigenous rangers." The AbCF's aim is to build wealth for Traditional Owners and non-Aboriginal carbon farmers, implementing carbon projects to demonstrate environmental, social and cultural core benefits through the ethical trade of carbon credits.[11] The Indigenous Carbon Industry Network (ICIN) is a network of Indigenous-owned

9 International Conference on Improving Residential Energy Efficiency, IREE 2017, Petra T Buergelt, Eliane L Maypilama, Julia McPhee, Galathi Dhurrkay, Shirley Nirrpuranydji, Sylvia Manydjurrpuy, Marrayurra Wunungmurra, Timophy Skinner, Anne Lowell and Simon Moss, "Housing and Overcrowding in Remote Indigenous Communities: Impacts and Solutions from a Holistic Perspective".

10 https://ibd.supplynation.org.au/public/s/search-results#loc=&search=Carbon please note the author is the owner and operator of one of these businesses.

11 https://www.abcfoundation.org.au/

12 ICIN Ltd is registered with ASIC in 2021 as an independent Indigenous led not-for-profit owned by full members.

organisations[12] that operate in north Australia to develop and deliver carbon projects largely focused on savanna fire management. Members include Indigenous-owned carbon businesses, Indigenous land management organisations and support agencies and associate members include all other entities. The members are currently producing around 1 million carbon credits through 33 Indigenous-owned savanna carbon farming projects employing hundreds of people in remote Australia. The ICIN vision is to promote and facilitate an active, innovative and Indigenous-led carbon industry supporting healthy country and better livelihoods for Indigenous people.[13] The First Nations Clean Energy Network (FNCEN) has only recently been established as a not-for-profit organisation, with gift deductibility status, that is looking to establish a powerful new network to ensure that Indigenous people play a "central role and harness the opportunities from Australia's renewables boom." The organisation is looking for financial support through tax deductible donations and seems to be taking the following approach:

- A focus on renewable energy projects in communities as Indigenous led activities to maximise benefits to the community
- As policy advocates with a focus on ensuring Indigenous people are at the centre of the renewable energy revolution, and
- To build partnerships with like-minded organisations, which include at present: National Native Title Council, Indigenous Land and Sea Corporation, ACTU, ETU, MUA, Smart Energy Council, Centre for Aboriginal Economic Policy Research at ANU, Clean Energy Council, Renewable Energy Alliance, Impact Investment Partners, Community Power Agency, Lowitja Institute, Climate Council and others.

Indigenous Business Australia (IBA) is a statutory authority of the federal government and is accountable to the Australian Parliament and the Minister for Indigenous Affairs. The IBA's enabling legislation sets out the IBA's purpose, powers, function, administrative and operational arrangements, and provides for its constitution, how directors are appointed, the appointment of the CEO and how the board holds legal meetings.[14] The IBA's purpose is to 'assist and enhance' Indigenous self-management and economic self-sufficiency and 'to advance the commercial and economic interests of Indigenous people through capital assets that benefit Indigenous people. The IBA's programs to deliver this purpose are:

- housing solutions or the successful home ownership program allowing Indigenous people access to mortgage finance that they may not ordinarily be able to access;
- business solutions providing finance for Indigenous business start-ups and expansions; and
- investment and asset management to build commercial capability and wealth creation from direct management of businesses and assets.[15] These programs are responsible for:
  - 3,047 new home loans over five years with total home loan portfolio of $5.1 billion in FY2020-21
  - 840 business finance provided over five years at $234 million which is valued at $127 million in FY2020-21
  - Employment of 1,451 Indigenous people across the country, and
  - Indigenous equity in investments valued at $175 million.[16]

Opportunities for Indigenous communities

Australia's existing electricity supply arrangements are transitioning to a lower emissions future enabled by increasing development and operations of renewable energy assets such as solar, wind and hydro.[17] Renewable energy assets, whether large scale or located behind the meter require land and access to real estate, respectively. In fact, as mentioned previously, AEMO's is forecasting the need for up to 50GWs (50,000MWs, Gladstone Black Coal Power Station is 1.6GW) by 2040 which equates to the use of substantive tracks of un-used land that has strong renewable energy resources. Additionally, AEMO also forecasts that total solar panel capacity (behind the meter) could be 24GWs or up to another 3.5 million installations by 2040[18].Indigenous people, and critically, the organisations created to determine and manage land from native title processes potentially have access to vast tracks of land that should provide the first opportunity for Indigenous people to be involved in the large-scale renewable energy asset contribution to the energy transition. The potential level of this opportunity would require further analysis to map renewable energy resource strength to Indigenous land holdings – suffice to say that this represents an important economic opportunity.

13 https://www.icin.org.au/who_we_are

14 https://iba.gov.au/about-us/governance/our-legislative-framework/

15 https://iba.gov.au/wp-content/uploads/2021/10/IBA-AR-2020-21-FINAL-web.pdf

16 https://iba.gov.au/wp-content/uploads/2021/10/IBA-AR-2020-21-FINAL-web.pdf

17 Non-hydro storage such as the Tesla battery system in Hornsdale does not produce renewable electricity.

18 Average size of solar PV systems are 6-8KWs.

At face value, renewable energy can and should provide economic opportunities to Indigenous people and communities, particularly where directly impacted. Generally, the economic opportunities for Indigenous people and communities include:

- For large scale renewable assets:
  - Being paid an annual fee for use of the land for the life of the asset
  - Where possible taking an equity position in the asset sitting on the land
  - Where possible being able to coordinate construction labour and operating labour for the asset as employees and suppliers
- For transmission electricity network assets where the line is expected to traverse Indigenous land and impact cultural heritage sites then Indigenous people have further opportunities to provide specific cultural advice for the design and construction of the asset
- For the 'behind the meter' opportunities provided by rooftop solar PVs, home batteries and EVs then Indigenous households:
  - In non-remote locations macro-economic factors such as household ownership, and growth in incomes provides the opportunity for these households to install solar PVs, storage and EVs
  - In remote locations, particularly where there are current monopoly service providers there are limited opportunities for Indigenous households to take advantage of the opportunity.

For Indigenous households to capture the opportunity provided by solar PV and storage in the home is less clear. Broadly, as Indigenous home ownership and income grows these factors would be expected to increase purchases of solar PV and storage, particularly for non-remote Indigenous households where mainstream reforms provide for competition and choice for consumers. For remote Indigenous households the pathway to taking advantage of solar PV and storage is less clear given the impact of other Government policies and services relating to non-competitive electricity service provision as well as public housing policies and extending to land tenure and management frameworks in remote Indigenous communities.

More critically, does the energy transition away from emissions intensive generation sources to renewable energy provide an opportunity to put at the centre Indigenous community's economic empowerment or is it simply another change where Indigenous economic priority becomes secondary to the broader mainstream objectives?

Anecdotally, in reviewing the current state of activity, Indigenous and non-Indigenous, the evidence is suggesting that rather than renewable energy being seen by policy makers and the energy industry as an economic opportunity for Indigenous people, Indigenous people's economic interests are a secondary, if not tertiary consideration.

What are the barriers to these economic opportunities?

The primary barrier, particularly for the large-scale renewable energy assets and transmission networks is a result of the economic flaw of native title land ownership, namely, that even with native title Indigenous people cannot typically 'veto' a proposed project on native title land as developers only need to negotiate in 'good faith'.

Accordingly, rather than renewable energy assets being a potential economic opportunity for native title holders, they represent a further example of the core uneconomic aspect of native title – being treated as a critical economic stakeholder. This ongoing trend is affirmed by reviewing the mechanics and submissions made by the prospectively impacted Indigenous group[19] and their comments on the Sun Cable Australia-Asia PowerLink to Singapore (AAPowerLink) which incorporates between 17-20GW solar farm and up to 42GW of storage.[20] The AAPowerLink combines the world's largest solar farm and battery storage facility -- situated near Elliott roughly halfway between Darwin and Alice Springs -- with a 5,000km transmission system intended to supply Darwin, Singapore and Asian markets with renewable electricity. The $30 billion project is scheduled to begin construction mid-2023, with completion by

19 https://ntepa.nt.gov.au/your-business/public-registers/environmental-impact-assessments-register/assessments-in-progress-register/australia-asean-power-link-project

20 https://suncable.sg/wp-content/uploads/TN_Suncable_4pg-Community-Information-Factsheet_Oct21_Digital_AW.pdf

late 2027, and is estimated to add $8 billion in value to the Northern Territory, and export $2 billion of electricity annually, creating 1500 jobs in construction, 350 operational jobs, and 12,000 indirect jobs across Australia, Singapore and Indonesia. It is standard practice in large scale generation development to pay landowners (even lease holders) a fee for the use of land. Accordingly, in the case of Sun Cable, the 15,000 hectares required for the project's assets would be expected to provide a strong passive income to impacted Indigenous groups — providing a foundation for enhanced economic outcomes beyond simply participating in the provision of labour for cultural services, construction and operations of the assets.

For Indigenous people and communities largely excluded from economic wealth creation because of the structure of native title land use policies, it may be difficult to maximise the economic opportunity from renewables and lowering emissions — particularly if policymakers and stakeholders continue to adopt policies and processes that marginalise Indigenous economic interests or alternatively continue to adopt approaches that seem to emphasise misalignment rather than seeking alignment between non-Indigenous and Indigenous economic interests.

Conclusion

The economic paradox and irony that increasing renewable energy to lower emissions is not necessarily translating into economic opportunity for Indigenous people should serve as a notice to policymakers, business people and Indigenous people and organisations — particularly those advocating for change and for a greater role for Indigenous people — that more needs to be done to ensure that Indigenous aspirations in this important area are not seen as a secondary aspiration for mainstream objectives.

Improving social and economic outcomes for Indigenous people and communities is not easy. The income, wealth and capability deficits endemic in remote communities create barriers that take time to close the gap, while decades of substantive government interventions, controls and management where problem identification and solution development designed and largely serviced by non-Indigenous values, institutions, frameworks and approaches have been shown to create further barriers.

Given the opportunity that the energy transition provides to Indigenous communities and businesses by way of being an integral stakeholder in the building of renewable energy assets, and given the continued expansive role of Governments in interventions into electricity supply to support renewable energy assets then it would be another missed policy opportunity to not focus on how these barriers could be effectively addressed.

About the Author

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James Reynolds has more than 22 years experience in the energy and utilities sectors, predominately energy markets (across power generation (renewables, coal, and gas), transmission and distribution networks, energy markets (trading), and energy retailing)), utility and market regulation, business execution and project delivery. His experience is diverse covering business and organisational leadership, governance, risk management, market and economic regulation and business operations in capital intensive high growth and rapidly changing environments. James is Founder and MD of Mirabou Energy and is of Gangalidda / Waanyi heritage from the Gulf of Carpentaria.

Related Works

Peter Gregory, *Township Leasing and the Democratisation of Opportunity,* CIS Analysis Paper 30 (AP30), 02 December 2021

Nyunggai Warren Mundine, Elizabeth Henderson, *Back to Basics: A new model for business creation in remote Indigenous communities,* CIS Analysis Paper 21 (AP21), 20 May 2021

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