



High Level Roundtable Policies to Improve Energy Affordability for Households

Background note June 2026

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Summary

The energy crisis triggered by the conflict in the Middle East is exacerbating pressures on household budgets. Since the start of the crisis, more than 90 governments around the world have deployed financial support mechanisms to help consumers meet rising energy prices. Of the more than 140 support measures implemented, only a quarter have been targeted. As fiscal pressures intensify, robust indicators can help governments identify priorities and vulnerable population groups, target support more effectively and direct resources where they will have the greatest impact.

This note demonstrates how energy affordability indicators can support governments in better targeting policies, improving their effectiveness, and informing more efficient use of public resources. It draws on practical examples to illustrate how these approaches can be applied to inform more effective policy design in different national contexts.

Better targeting through indicators helps reach those most in need. Energy affordability pressures are shaped by multiple factors, including income, energy prices, housing efficiency, and household composition. Incorporating these dimensions in analysis improves understanding of affordability challenges and supports the design of more effective, targeted policy responses.

Indicators are key to evaluating policy effectiveness across sectors. Tracking indicators supports the continuous improvement of policy design and helps assess broader socio-economic impacts beyond the cost of policy interventions, including health, education, and living conditions. By providing information about different dimensions of policy outcomes, indicators enable better coordination across policy areas by highlighting interlinked effects, improving coordination between ministries, and strengthening outcomes and cost-effectiveness.

Existing data can be leveraged to enhance effective policymaking. To collect data and develop the methodological and institutional infrastructure to build and make effective use of energy affordability indicators, governments do not need to start from scratch. They can strengthen monitoring by building on existing data systems and administrative structures, including household surveys and social protection databases, and by integrating energy affordability measures into existing social support systems.

Introduction

Energy technologies and systems have a direct impact on people's lives; from how households heat, cool or light their homes, to the way energy costs affect small businesses, and how workers adapt and adjust their skills as the energy sector evolves. When energy policies are designed to ensure such systems impact societies positively, they can deliver quality jobs, greater affordability and better health, among other socio-economic gains.

How governments navigate changing energy landscapes and leverage energy policy to deliver tangible benefits for populations has taken on increasing importance in the multilateral agenda. In 2024, G20 leaders endorsed the [10 Voluntary Principles for Just and Inclusive Energy Transitions](#), which set out principles to guide countries in the design of fairer energy systems.

Building on these principles, the [Global Indicators Handbook for Just and Inclusive Energy Transitions](#), was released as a Presidency document under South Africa's G20 Presidency, as part of the official programme of the G20 Energy Ministerial Meeting. The Indicators Handbook was developed to identify indicators that can be used to track and monitor the impacts of energy policies and inform their design and implementation. It was a first step towards assessing how policy and programme outcomes can be measured and tracked, exploring different methods of collecting data and identifying limitations. Multiple governments have recognised the value in working collectively towards an understanding of how to assess and monitor the effect of energy policies across populations and through this, develop tools to drive better outcomes.

The energy crisis triggered by the conflict in the Middle East is exacerbating pressures on household budgets that had already increased during the coronavirus pandemic. The commitment of governments to address energy poverty and affordability was made clear prior to the crisis, as acknowledged by many governments at the 2026 IEA Ministerial.

This paper, which complements an upcoming [IEA methodological review of energy affordability indicators](#), presents initial evidence on how indicators can help improve the effectiveness of policies that address energy poverty and affordability, and highlights areas for further work.

Indicators to inform better policy design

The IEA [Household Energy Affordability](#) report, released in February 2026, found household energy bills remained higher in 2025 than before 2019. The report also found that energy inequality has not improved in the last decade, with lower-income households spending twice the share of income than the average household spends to cover energy costs. Addressing these challenges requires effective tools to improve the targeting of affordability policies and strengthen the monitoring and evaluation of existing programmes. In the context of the current energy crisis, and to enhance preparedness for future shocks, the development of affordability indicators, has become an even greater priority.

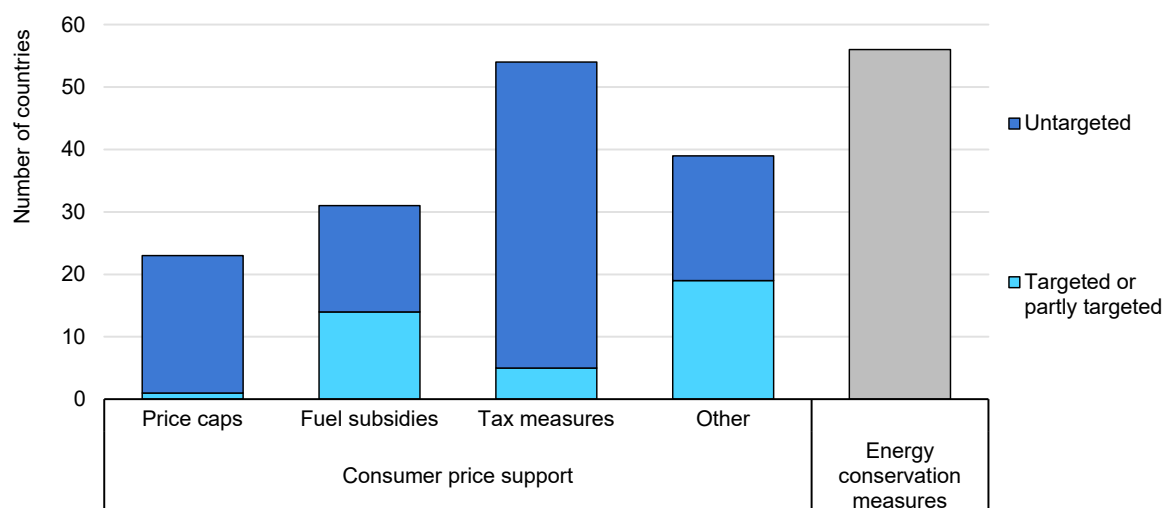
Recent energy crises have highlighted the need to adopt more targeted policies

In the context of the current energy crisis, more than 90 governments around the world have deployed financial support mechanisms to help consumers meet rising energy prices. Short-term measures, such as price caps on specific energy products or temporary fuel subsidies, have helped cushion the effect on consumers of sudden price increases. While most countries have focused on rapid-response interventions, governments are also focused on a longer-term view on how policies and energy systems can be developed to improve affordability and build resilience to future shocks.

Assessing which households are most exposed to energy price shocks, but have the least means to shield themselves from their consequences, is an important consideration in the design of both immediate and long-term policy responses. Since the start of the crisis, of the more than 140 consumer support measures implemented, only slightly more than one in four have been targeted. This is similar to what was seen between 2022 and 2023, when the energy crisis prompted governments to spend USD 940 billion on shielding consumers from price increases, yet [only 25% of this support](#) was targeted to low-income households and highly affected industries. While untargeted policies can be quick to roll-out, especially in a crisis context, they also tend to pressure fiscal budgets while benefitting richer households and not necessarily reaching those most in need of support.

The lack of comprehensive data on income and energy use [has been cited](#) as one of the main reasons for low levels of targeting in the previous energy crisis. With fiscal pressure accumulating from previous crises, many governments are now seeking how to use existing data and indicators to identify the consumers most in need.

Energy crisis consumer support measures, by type, June 2026



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Source: IEA (2026), [Energy Crisis Policy Response Tracker](#), (accessed 15 June 2026).

France's [recent approach](#)¹ illustrates this effort to direct financial support more effectively towards those who need it most. During 2022–2023, as in many other countries, measures designed to shield households from rising energy prices were largely untargeted. France has since combined administrative tax records with information from energy distributors and suppliers to identify vulnerable groups, including low-income households and workers with high exposure to energy costs. This enables the government to provide different levels of financial support based on need. While impact assessments indicate that the earlier approach was effective in limiting price increases for households, it also imposed substantial fiscal costs that were not sustainable over the long term.

Improving governments' ability to leverage existing data and identify new indicators has the potential to significantly enhance policy effectiveness and resource efficiency. In particular, it can help identify the factors increasing the vulnerability of households to energy cost pressures from the outset of policy design processes.

¹ Unless stated otherwise, policy examples included in this note are IEA summaries based on governments' official websites and publications.

Improved policy targeting guided by indicators helps reach those who most need support

Because households experience energy affordability challenges in different ways different indicators can be helpful in identifying households who should receive most support from affordability policies. Some households dedicate a significant share of their income to covering energy costs. Others pre-emptively reduce their consumption to lower bills, even if this limits their ability to keep their homes adequately warm or cool, power lights and essential appliances such as refrigerators that help safely store food.

While low-income households are often most affected by energy poverty and affordability challenges, many households facing difficulties in affording energy are [not necessarily income poor](#). If policies were designed solely based on income factors, this would risk disregarding a large proportion of households facing issues affording and consuming sufficient energy to fully meet their needs.

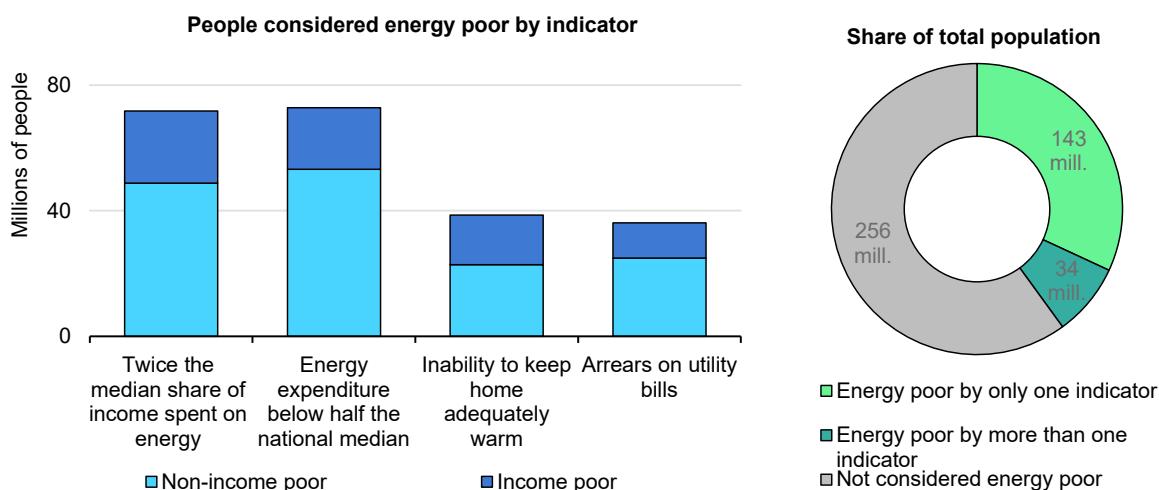
In the European Union, [nearly 70 million people](#) are considered both energy poor and income poor, yet more than twice as many people who are considered energy poor are not income poor. Therefore, household income alone cannot fully identify all population groups facing these challenges, and a broader set of complementary indicators is needed. For example, an indicator such as *high energy spending* can overlook households that restrict consumption to manage costs, while *low consumption metrics* may reflect higher home efficiency rather than deprivation, which is better reflected in the *arrears on utility bills* or the *inability to keep the home warm*. In the EU, [very few people](#) considered energy poor simultaneously face all of the challenges reflected by these four indicators, however around 40% of the total population face at least one.

Several countries, such as Brazil, have already done significant work to develop and centralise the collection of energy poverty and affordability indicators in order to improve policy targeting over time. For example, the Social Electricity Tariff, which covered roughly 23% of Brazilian households in 2024 and offers a discount on electricity bills for low-income families, builds on extensive data collection efforts. The Tariff Households receive progressive discounts so those with the lowest levels of consumption receive the highest discounts.² This tiered structure was designed to preserve essential energy use and avoid subsidising very high

² Until 2025, consumption of up to 30 kWh per month – which is enough to power basic lighting, phone charging, a fan and a television – received a 65% discount; between 31 and 100 kWh, received a 40% discount; and between 101 and 220 kWh, a 10% discount. Discount rates are applied such that when households exceed a consumption threshold, they keep the higher (65%) discount on their initial usage (30 kWh), but additional use receives progressively smaller discounts.

consumption. Among other criteria, households must be registered in Brazil's unified registry for social programmes *CadÚnico* to be [eligible for the discounted tariff](#).³

Population experiencing energy poverty and income poverty per energy poverty indicator in the European Union, 2024



IEA. CC BY 4.0

Notes: Income poor is defined as people whose disposable household income, adjusted for household size, is less than 60% of the national median income.

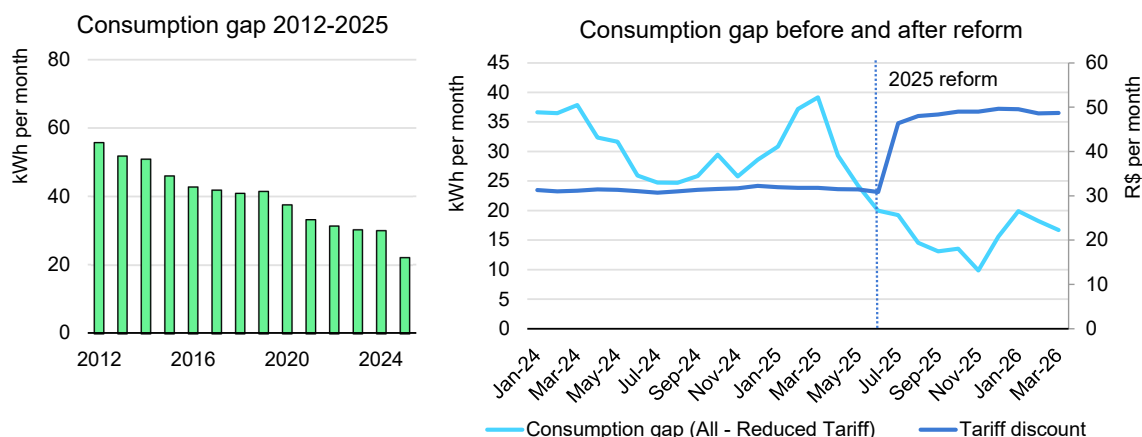
Source: IEA (2026) [Household Energy Affordability](#).

Indicators from Brazil's [Energy Poverty Observatory](#) show that in 2022 around 61% of *CadÚnico* households remained below the extreme poverty line after energy expenses, despite receiving the discounted tariff. [Evidence](#) also suggests that, in 2018, eligible households still consumed about 20 kWh less electricity per month than comparable non-eligible households, suggesting that many households still consumed less energy than they needed despite the discounts they received.

In response to these dynamics, Brazil [reformed](#) the tariff in May 2025 to fully subsidise the first 80 kWh (about half of the average household consumption in the country) of monthly consumption for low-income households. The result of Brazil's policy reform can be seen in consumption trends. The consumption gap between households enrolled in the tariff and the national household average, has narrowed from 60 kWh per month in 2012 to less than 20 kWh in 2025, with the sharpest reduction seen after the 2025 reform.

³ Cadastro Único is a registry that allows the Brazilian government to identify and understand the living conditions of low-income families. Families with a monthly income of up to half the minimum wage per person can register, which grants access to more than 30 social programmes, including Bolsa Família and the Social Electricity Tariff.

Progressive reduction of the electricity consumption gap between households eligible and non-eligible for the Social Tariff in Brazil



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Note: In the left figure, yearly consumption gaps correspond to December figures.

Source: IEA analysis based on data from the Brazil's [National Energy Agency](#) (2026).

The availability of energy affordability indicators on Brazil's Energy Poverty Observatory facilitates the identification of vulnerable groups that can inform similar policy reforms and widen the benefits of energy affordability programmes.

In other countries, similar policies, such as South Africa's provision of 50 kWh of Free Basic Electricity, enable households that cannot afford basic services to access consistent indoor lighting, use essential appliances and has also led to positive impacts on household health and education.

In addition to understanding which households are affected, it is also useful for policymakers to identify the factors, such as the efficiency of homes or household composition, that shape and amplify energy affordability pressures. Considering a broad range of methods to measure the drivers of affordability can help determine the type, extent and priorities of policy responses.

Spain has been continuously refining its approach to better understand and address the root causes of energy poverty and affordability challenges. The [2019 – 2024 National Strategy against Energy Poverty](#) established four indicators to monitor energy poverty:

- Disproportionate energy expenditure, measuring households whose energy spending relative to income is more than twice the national median
- Hidden energy poverty, capturing households with exceptionally low energy consumption, defined as the percentage of households whose energy expenditure is below half of the national median

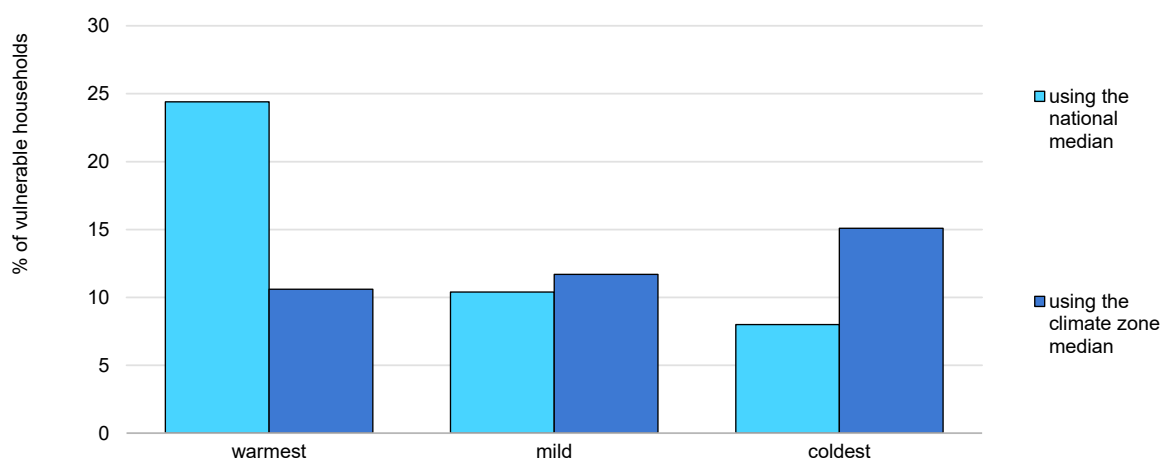
- Inability to keep homes adequately warm during winter
- Arrears on utility bills due to financial difficulties over previous 12 months.

These indicators were developed to capture the different dimensions of energy poverty and to consistently track progress over time. However, on their own, they cannot fully reflect the complexity of the phenomenon or the variety of factors that drive it. [Government research](#) shows that policies targeted solely based on hidden energy poverty, for example, may reach different households than policies that also account for factors such as climate conditions. Analysing hidden energy poverty at both the national and climate-zone levels offers a more accurate picture of the challenges faced by households and supports more effective policy targeting.

Spain's 2019 strategy strengthened consideration for how factors such as housing characteristics and climate are considered to affect households' ability to consume the energy they need. For example, the [Thermal Social Bonus](#), introduced under the strategy, provides an annual payment to vulnerable households to help cover winter energy costs, with benefit amounts varying [according to their climate zone](#).

The new [National Strategy against Energy Poverty 2026-2030](#) builds on the work of the 2019 strategy with the creation of a [National Observatory on Energy Poverty](#). The Observatory will include a repository of diverse energy poverty indicators, which will facilitate policy decisions and improve the precision and effectiveness of interventions.

Households experiencing hidden energy poverty in Spain, by national median and climate zones, 2024



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Note: In the warmest zone, 24% of households spend less than half the national median; but only 11% spend less than the half of the median of their zone. In the original source, the *warmest* zone corresponds to zone *alpha*, the *mild* zone corresponds to zone *C*, and the *coldest* zone corresponds to zone *E*.

Source: IEA analysis based on Government of Spain (2024) [Report on actions to combat energy poverty and update on indicators](#) (Balance de las actuaciones contra la pobreza energética y actualización de indicadores).

Indicators can be progressively improved as new data become available, moving from simple measures towards more comprehensive and policy-relevant assessments. For example, in Italy, [energy poverty has been measured](#) through indicators capturing high energy expenditure relative to income and low disposable income after paying energy costs since 2017. In recent years, Italy has complemented these indicators with [multidimensional metrics](#) combining modelled energy costs, building quality, socio-economic characteristics and geo-spatial vulnerability indices. This development has revealed strong regional and socio-demographic disparities — notably higher risks in southern regions, suburban areas and households with children — and has supported better targeting of policies such as social tariffs and building renovation programmes.

Indicators are key to assess policy effectiveness across sectors

Energy policies can be designed to deliver lower bills, but can also improve livelihoods, health and education outcomes, and other socio-economic aspects. Measuring the extent to which energy policies deliver these outcomes helps to assess the effectiveness of different policy tools in achieving certain socio-economic goals and can also lead to innovative cross-sectoral policies.

Generally, individuals facing energy affordability issues have a [higher reported probability](#) of poor physical and mental health. This can [increase demand for medical care](#), which puts additional pressure on household budgets especially for lower-income groups, and raises public health costs. Recognising energy poverty as a negative driver of health outcomes can improve targeting and enable cross-sectoral policies that reduce overall health expenditures.

Energy poverty's overall impact on health and wellbeing can also affect educational outcomes and extend to households' economic opportunities. [Evidence from more than 30 studies](#) shows that access to reliable and affordable energy in emerging markets and developing economies (EMDE) is associated with higher school enrolment, increased study time and improved educational attainment, and resulting in a roughly 15% improvement in academic results. It also contributes to [higher lifetime earnings](#) and improved living standards.

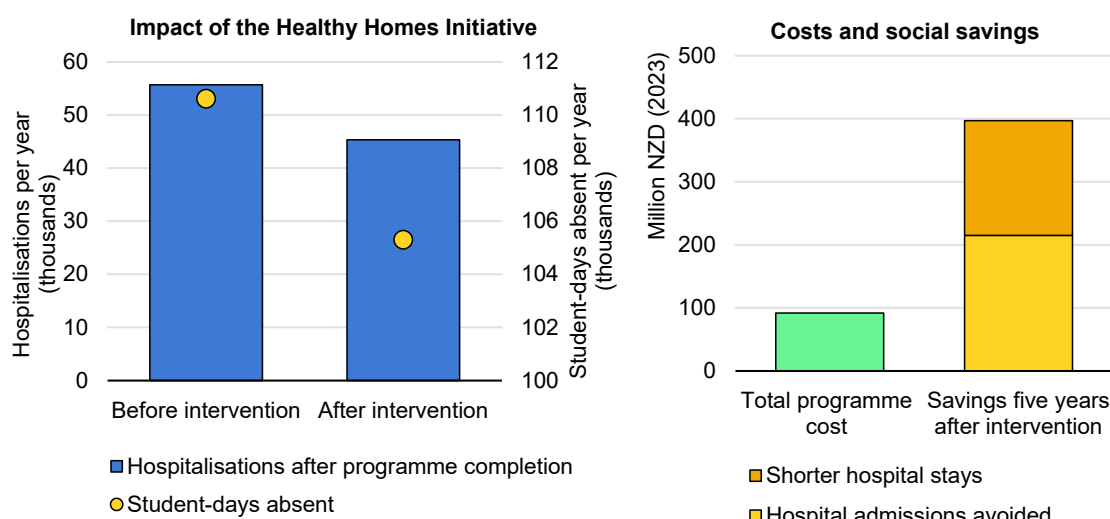
Ministries of energy, labour, education, health or planning often operate in segmented ways. However, there can be significant overlap in the effect their policies have on populations. Tracking indicators across different dimensions can help foster better collaboration among ministries, identify opportunities to align policy action and deliver greater gains for households and fiscal savings for governments.

In New Zealand, the [Healthy Homes Initiative](#) established in December 2013, was designed to reduce hospitalisation rates through housing interventions including energy efficiency improvements, energy savings advice, and social and income support such as discounts on bills. While a major predecessor of the programme, Warm Up New Zealand, was led by the Energy Efficiency and Conservation Authority in coordination with health authorities, the Healthy Homes Initiative is led by Health New Zealand (previously the Ministry of Health), who now refers beneficiaries to energy authorities.

The programme uses a comprehensive set of administrative data linking information on individual-level health, education, housing, income and social parameters to target recipient households and evaluate outcomes. An evaluation of tracked indicators found the programme is associated with an 18.6% reduction in hospitalisation among participants and roughly 5% lower school absenteeism.

When launched in 2013, the programme targeted low-income families with health risks living in crowded households. Over time, it contributed to generating net savings for the public health system, which were four times greater than the original total cost of the programme. In 2023, the high return on investment reflected by health, education and energy indicators – among others – was used to expand coverage to households across the country.

Impact of the Healthy Homes Initiative on health and education outcomes and its cost and social value in New Zealand, 2014-2023



IEA. CC BY 4.0.

Note: The integrated HHI intervention reduces hospitalisations by 18.6%, compared to 11.8% for insulation and heating alone. It includes additional measures—ventilation, moisture control, housing repairs, energy-use support and social services - which drive broader outcomes, including avoided healthcare costs, reduced severity of hospitalisations, and lower school absenteeism.

Source: IEA (2026) [Household Energy Affordability](#).

Structural energy affordability interventions can be designed to deliver benefits across the entire population while still addressing distributional challenges. Improving building energy performance, for instance, can lower individual household energy costs and enhance comfort, while improving overall housing standards and contributing to lower system costs through reduced energy demand. In Mexico, for example, the [EcoCasa programme](#) provides preferential financing and technical assistance to developers building energy-efficient housing for low- and middle-income households. The programme's effectiveness is assessed by monitoring indicators on household energy use and comfort as well as urban environment quality indicators such as the location of these houses in existing urban areas. Almost 300 000 people have benefited *EcoCasa* [since it was launched](#) in 2013.

Leveraging existing data to enhance effective policymaking

Although collecting data on energy affordability and developing the methodological and institutional infrastructure to fully leverage this data requires effort, governments do not need to start from scratch. This section highlights practical ways to enhance data collection and indicator systems by leveraging existing resources and adapting them to national contexts and constraints.

Ideally, comprehensive administrative databases capturing household energy consumption and expenditure, or dedicated surveys, would provide the most accurate picture of affordability challenges, as illustrated by instruments such as the United States' Residential Energy Consumption Survey (RECS). However, developing and maintaining such systems can be costly and demanding in terms of administration. While national definitions of energy poverty and affordability - whether embedded in legislation or policy frameworks - shape how indicators are built and which data needs to be collected, countries can often rely on established surveys, administrative records and sectoral databases to develop meaningful indicators at lower cost.

Rich databases including information about affordability issues, and household income and living conditions, as available for European countries, allow the cross-referencing of affordability with other indicators such as income sources, labour market status, family composition, access to social benefits, health status, and housing and material deprivation variables. These databases enable detailed analysis to identify households facing multiple energy affordability vulnerabilities and to quantify the overlap between energy poverty and other social risks, such as income poverty and poor housing conditions.

In practice, countries can take advantage of existing data sources. Household budget surveys and time-use surveys, originally designed to track consumption

patterns or daily activities, can be used to infer energy-related expenditure and behaviours. These can be complemented by adding targeted questions on energy affordability, as demonstrated by the integration of relevant questions in the Survey on Income and Living Conditions ([EU-SILC](#)) questionnaire. In Ireland, the [Irish Household Budget Survey](#) was redesigned between 2020 and 2023 to integrate the EU-SILC. This change brought into the Household Budget Survey framework information that could be linked to housing costs, energy expenditure, deprivation indicators and income poverty, paving the way to the development of more accurate affordability metrics.

Data is often fragmented between levels of government. Local government can collect data at a much more granular level than national administration. The proximity of local authorities to residents, can be leveraged to centralise existing data resources for programmes designed at the national level that also help improve targeting and implementation at the local level. In Canada, for example, the [Oil to Heat Pump Affordability programme](#) provides upfront grants to help low- and median-income households replace oil heating systems with electric heat pumps that contribute to reducing energy bills. The programme, launched in 2022, is a federal initiative, but its implementation relies on strong multi-level coordination. Local and utility-level actors (e.g. provincial energy agencies or programme partners such as system operators), use their local data resources to channel applications and outreach through existing regional programmes, and help reach eligible households more effectively.

Administrative databases used to deliver social benefits include, among other areas, a large amount of social, economic and housing characteristics of vulnerable households. This information is also very relevant for the development of energy affordability policies. The use of these databases can be expanded to inform and manage energy affordability programmes, as seen in countries such as the [Cadastro Unico in Brazil](#) and the [Registro Social de Hogares in Chile](#). Similarly, health information systems that are widely available and increasingly digitalised can provide complementary insights when linked to social and energy data.

There are several examples where energy affordability support is offered alongside existing social assistance systems rather than operating as a standalone programme. These cases are particularly relevant because they demonstrate how centralised social registries and data-sharing arrangements can improve targeting, automate eligibility determination, reduce non-take-up, and simplify administration. Countries that have achieved high coverage increasingly rely on centralised registries or interoperable databases that allow energy-support programmes to leverage existing social protection systems. Some examples of this approach include:

- In 2023, Germany expanded its means-tested housing benefit to address the energy crisis by integrating a permanent heating cost component and a climate

element into the benefit formula. Rather than creating a new targeting system, the reform builds on established administrative structures (income, household composition and housing costs) and uses standardised allowances to better reflect energy-related living costs within housing support. Delivered through municipal welfare offices in a federal–state framework, the reform strengthens coverage, particularly for low-income and near-poor households, while relying on existing application and eligibility procedures.

- Poland uses existing social assistance databases (and administration) to target and provide energy support. Recipients of the social welfare system, who are also entitled to the Housing Allowance (a means-tested welfare benefit), can also apply for [Energy Allowance](#), making support available to lower-income groups.
- In the United Kingdom, the [Warm Home Discount](#) (a one-off bill discount) is automatically granted to households on means-tested benefits such as Universal Credit and Pension Credit. As in Poland, the United Kingdom administration used the existing welfare infrastructure to provide targeted energy affordability support.
- In Korea, the [Energy Voucher Programme](#) provides income support to families for summer cooling and winter heating expenses. To access the benefit, households must be eligible for the National Basic Livelihood Security system, which is the guaranteed minimum income programme and provides support to vulnerable households for medical, housing and education expenses.

From a multilateral perspective, the statistical community has been working on the development of methodological frameworks and multi-country data collection. Examples of this work include the [EU Recommendation 2020/1563](#) on energy poverty, that proposes a concrete set of indicators and a classification system; the [Regional Observatory on Sustainable Energy \(ROSE\)](#) in Latin America, built to support SDG7 monitoring and energy poverty measurement across countries and with a focus on multidimensional energy poverty (access, affordability, quality, energy transition); and the [ASEAN Energy Database System \(AEDS\)](#) in Southeast Asia, which includes a standardised regional dataset on energy systems and socio-economic indicators.

Finally, new technologies can enrich analysis of energy affordability. For example, data from energy providers or mobile phone operators, combined with geographic information system tools, can help identify spatial patterns of vulnerability. Such approaches, however, must operate within strict legal frameworks to ensure data security, privacy and confidentiality, and require clear communication to maintain public trust and social acceptance.

Direction for future work

In October 2025 the South African G20 Presidency released the *Global Indicators Handbook for Just and Inclusive Energy Transitions* as a G20 Presidency document. Many countries welcomed the handbook and the opportunity to discuss how to track and measure effectiveness across different areas of energy policymaking. During discussions at Global Commission meetings in Durban and subsequently in Belém, Brazil, countries expressed a desire to continue this focus on indicators in the next phase of the commission's work, to ensure that indicators are used systematically across energy policymaking to improve targeting, monitor impacts and support more effective policy design.

These takeaways inform the next phase of the Global Commission, whose purpose remains to support countries in designing and implementing energy policies that lead to fairer outcomes. With this objective in mind, the Global Commission will:

- Deepen analysis on indicators across the commission's three key themes (jobs and skills; affordability, energy poverty and distributional impacts; and stakeholder engagement and public participation),
- Identify practical steps to use indicators to improve policymaking, including the targeting of key populations and the tracking of outcome,
- Quantify the value of tracking in improving policy effectiveness.

Developing this work will support governments in strengthening policy targeting throughout implementation. It will also help to assess policy effectiveness via financial and non-financial metrics, including health outcomes, fiscal savings and educational gains. Others benefit include the identification of new opportunities for indicator development and support for governments in prioritising data collection in a context of limited fiscal space. Ultimately, this work will contribute to broader international efforts to monitor and track fairness in energy policymaking, including through processes such as the G20, COP and related frameworks.

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Annex

Abbreviations and acronyms

AC	Air conditioner
AEDS	ASEAN Energy Database System
ASEAN	Association of Southeast Asian Nations
EMDE	Emerging markets and developing economies
EU	European Union
HHI	Healthy Homes Initiative
RECS	Residential Energy Consumption Survey
ROSE	Regional Observatory on Sustainable Energy
VAT	Value Added Tax

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