



WFER IX

When Balance Is Achieved



IX WORLD FORUM
ON
ENERGY REGULATION

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Consumer Empowerment & Energy Poverty Mitigation

A Latin American diagnostic and the Spanish perspective

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25 YEARS OF DIALOGUE

ARIAE at a glance



asociación iberoamericana de entidades
reguladoras de la energía
associação iberoamericana de entidades
reguladoras da energia



A regional platform for regulatory cooperation across Latin America.

Latin American Association of Energy Regulators

A forum for regulatory
dialogue, training, shared
studies and cooperation on
common energy challenges.

Created in Buenos Aires in 2000

REGIONAL REACH

25 authorities

Energy regulators from 20 countries, connecting national experience with regional dialogue, including Central America's regional electricity regulator.

2025 – 2028 PRESIDENCY

Work programme

Pillar A. Internal operations
Pillar B. Capacity building
Pillar C. Annual regulatory meetings
Pillar D. Energy regulatory institutional framework
Pillar E. Studies and policy work

WORKING MODEL

8 working groups

Eight sectoral and cross-cutting groups turn regulatory experience into benchmarks, surveys, webinars and shared learning.

Electricity
Gas
Biofuels
Consumers
Social Communication
Gender Equality
Cybersecurity
Institutional Affairs

SHARED PURPOSE

Cooperation

ARIAE promotes regulatory dialogue, harmonisation, training and common studies.



ARIAE provides the regional lens. Spain contributes with one national experience within that wider conversation.



Latin America: a clean electricity leader with persistent energy inequality

Consumer policy sits at the intersection of access, affordability, resilience and a rapidly changing power system.

ACCESS GAP

17 million

People still lack access to electricity. The gap is concentrated more heavily in rural areas.

CLEAN COOKING

74 million

People lack access to clean cooking systems and continue to rely on wood or charcoal.

POWER MIX

Over 60% renewable

Renewables already provide a majority of regional electricity generation, led by hydropower.

INCOME GAP

Access remains unequal

Lower-income households are far more likely to lack electricity access, with an even wider gap in rural areas.

ELECTRIFICATION

Demand will grow

Electricity demand rises strongly towards 2050 as transport, cooling, appliances, industry and hydrogen electrify.

GOVERNANCE ECOSYSTEM

Regulatory frameworks

Updated regulatory frameworks that incorporate social and technological innovations and participatory and effective governance.

The regional paradox: abundant clean-energy potential does not automatically translate into universal, affordable and usable energy services.

ARIAE evidence: vulnerability is recognised, but not consistently defined

Preliminary 2026 findings from the Consumer Working Group.

CONSUMER AGENDA

14 institutions

Fourteen institutions compared vulnerability definitions, targeted subsidies, consumer services, accessibility and implementation gaps.

<5

regulatory entities
reported an explicit
definition of energy
vulnerability

COVERAGE

Electricity dominates

Electricity dominates definitions and support schemes. Gas and clean cooking receive less systematic treatment.

COHERENCE

Definitions matter

Without an explicit definition, eligibility, monitoring and cross-country comparison remain fragmented.

DIAGNOSIS

Income is only one lens

Income alone misses energy burden, essential medical needs, housing quality, household size and remoteness.

REGIONAL WARNING

Consumption ≠ vulnerability

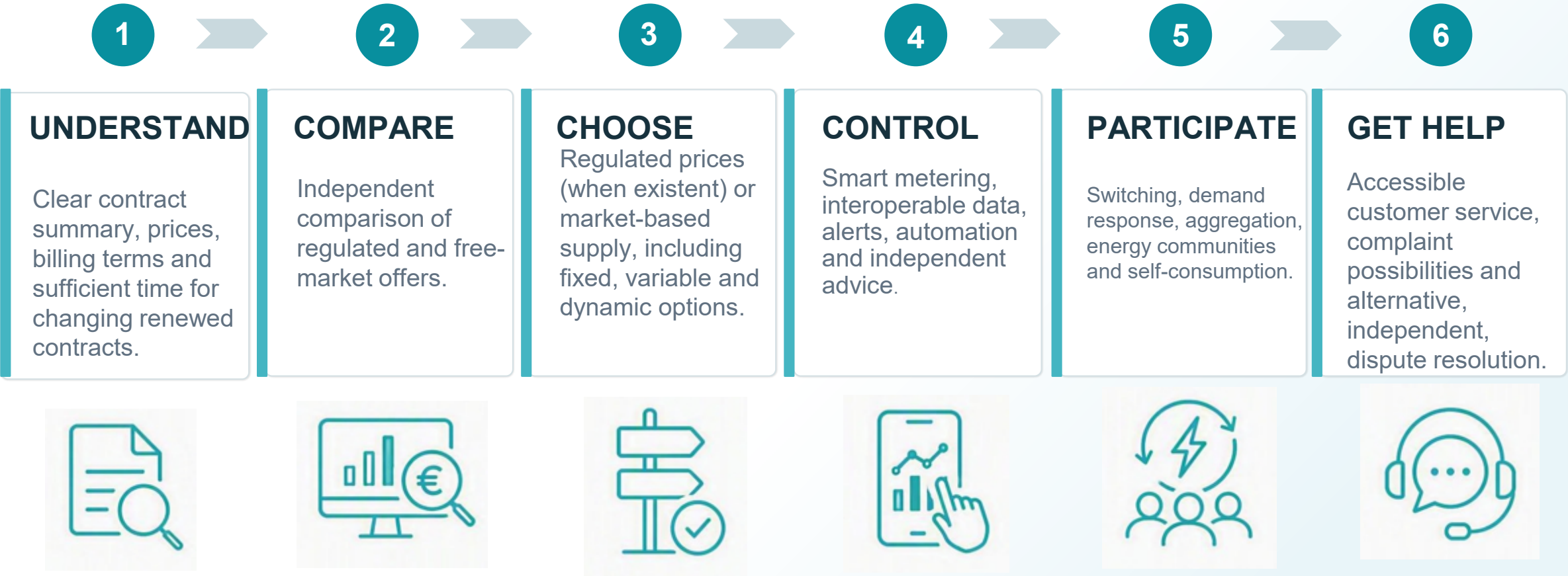
Consumption thresholds simplify the administration but can miss under-consumption and essential energy needs.

In a context of market liberalisation and the gradual phase-out of regulated prices, mechanisms are needed to protect vulnerable consumers. Wethereas these mechanisms take the form of tariffs or bill discounts; clear eligibility criteria must be established.



Consumer empowerment

Digital tools deliver value only when they sit on strong rights, trust and market supervision.
Turning market complexity into usable choices



THE SPANISH APPROACH

One consumer policy, two sectoral pathways

Electricity and gas differ in market conditions (prices), but good protection follows the same design principles.
Spain | Household energy consumers: a multi-layered framework with a protection toolkit for vulnerable households

REGULATED OPTION

A regulated last-resort tariff available to eligible consumers through designated last-resort suppliers.

PVPC (Voluntary electricity price for small consumers)

TUR (Last-resort gas tariff)

LIBERALISED MARKET

Supplier and offer selected by the household, subject to contractual transparency and consumer-protection rules.

Free-market contract

Both require clear information, reliable billing and effective redress.

The PVPC and TUR are a regulated supply option. They are not, by itself, a vulnerability benefit.

Vulnerability support based on socio-economic and household criteria.

TARGETED SUPPORT

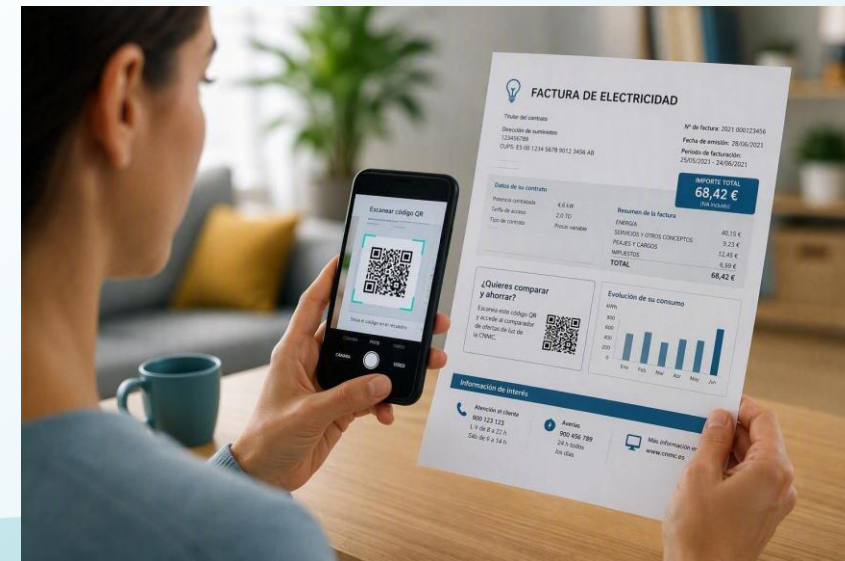
Electricity social tariff + Thermal Social Bonus

Electricity -> discount applied in the bill
The thermal bonus contributes to heating, hot water and cooking costs regardless of the household energy source (fuel neutral)
Thermal -> bank transfer

CONTINUITY

Additional safeguards against disconnection

Eligibility is assessed for electricity social bonus and then extended automatically to thermal support
Protected vulnerable consumers benefit from additional continuity measures.





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Thank you for your attention



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