

Business Case

Energy Theft Programme 2026–27

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Executive Summary

<p>Background</p>	<p>Energy theft remains a significant public safety issue, posing risks of electrocution, fire, and explosions. Each year, an estimated £0.9–£1.4 billion worth of energy is stolen across Great Britain, indirectly increasing costs for all consumers. Addressing it remains a key priority for RECCo, and we’ve identified three activities for the 2026–27 Energy Theft Programme.</p> <p>Discovery activity with Crimestoppers</p> <p>The City of London Police (CoLP) Energy Theft Enforcement Service (ETES) Pilot Scheme demonstrated that when referrals are investigated by the police it is possible for action to be taken, including warrants and arrests. While the ETES cannot currently be extended with the CoLP due the ongoing Government review of policing, RECCo wants to build on the gains it has made in this area. This year we will explore options within Crimestoppers for an increased assessment, analysis, and triangulation of information that could be used to link Energy Theft to other crimes in order to pursue police action through a different route. We expect this work to require a minimal level of investment and will be funded via the Change Investment allowance.</p> <p>Digitalisation of the Retail Energy Code ‘Theft Calculator’</p> <p>The Retail Energy Code (REC) Theft Calculator is a tool designed to estimate gas or electricity consumption to assess potential energy theft. It captures necessary data to provide an estimate of the quantity of energy that a home or business could be expected to consume. The current Theft Calculator is provided by the Energy Savings Trust and published in excel format on the REC Portal. Industry has requested this tool be digitalised and updated so it can be accessed and used consistently across platforms and devices – and so that the underpinning data and methodology reflect ongoing changes within the energy industry. For the coming year, we’ll develop a Business Case to support the investment required for the digitalisation of this tool. This initial research stage will be funded from the Sundry Projects allowance.</p> <p>Stay Energy Safe Growth Campaign</p> <p>Since its launch, Stay Energy Safe has been instrumental in addressing this challenge and has contributed to a fivefold boost in reports, from 2,613 in 2017–18 to 13,415 in 2024–25, and improving conversion rates to 76%. Despite this success, awareness has plateaued at around 7% nationally, and public understanding of the dangers of energy theft remains low.</p> <p>Under RECCo’s strategic objectives, the growth strategy supports a safe and fair energy market by protecting consumers and maintaining public confidence. To sustain progress and meet these aims, Stay Energy Safe must evolve from regional awareness activity to a national deterrence and education campaign capable of driving cultural change. This Business Case proposes an incremental allowance of £0.5m for this activity, to be funded within REC Services.</p>
<p>High-Level Objectives</p>	<ul style="list-style-type: none"> • Protect consumers and communities by raising awareness of the dangers of energy theft and reducing incidents that endanger life or property.

	<ul style="list-style-type: none"> • Deliver a step-change in national visibility, moving beyond localised radio and digital activity to include television, out-of-home (OOH), PR, and digital channels for broad and sustained reach. • Make energy theft socially unacceptable through consistent, evidence-based messaging that deters tampering and encourages reporting via the Stay Energy Safe tip-off line. • Support RECCo’s strategic goal to improve market assurance and consumer protection, demonstrating clear alignment with the REC’s principles of transparency, efficiency, and public safety. • Build on positive engagement and learnings from the ETES Pilot. • Better support industry parties with onsite theft prevention and detection activities
<p>High-Level Outcomes</p>	<p>Strengthened relationship with Crimestoppers and better quality, joined up referrals, investigations and reporting.</p> <p>Digitised Theft Calculator that can be used onsite by revenue protection and theft detection resources.</p> <p>National TV rollout alongside enhanced OOH, PR, and digital activity.</p> <p>Expected outcomes include:</p> <ul style="list-style-type: none"> • A rise in national awareness from 7% to 10–11% in FY2026–27, with further growth to 14–18% by FY2030. • Increased reach of approximately 220 million individuals and 540 million impressions nationwide. • Stronger deterrence and improved consumer understanding of energy theft risks, supporting fewer unsafe tampering incidents and more proactive reporting. • Sustained visibility of Stay Energy Safe as the trusted national platform for energy safety information and reporting.
<p>Recommendation</p>	<p>It is recommended that RECCo:</p> <ul style="list-style-type: none"> • Utilise the Change Investment allowance to fund a discovery fund with Crimestoppers to build on the ETES Pilot. • Utilise the Change Investment allowance to fund a discovery phase and develop a Business Case to support digitalisation of the Theft Calculator. • Provide £0.5m investment, bringing the total FY2026–27 marketing budget to £1.0m, to fund a national, multi-channel awareness campaign. <p>This proposal directly supports RECCo’s strategic commitments under the REC to protect consumers, ensure public safety, and promote confidence in the energy market. Expanding Stay Energy Safe nationally through television and OOH will deliver the scale and visibility required to shift public attitudes, prevent harm, and embed energy safety as a shared social responsibility.</p>

Description	
Benefits & Outcomes	<p>The Energy Theft Programme 2026–27 directly supports RECCo’s strategic objective to protect consumers and maintain a safe, fair energy market. The programme brings together three complementary initiatives that strengthen both prevention and enforcement pathways:</p> <ol style="list-style-type: none"> 1. Stay Energy Safe Growth Campaign to increase national awareness and deterrence 2. Crimestoppers discovery activity to improve intelligence quality and strengthen routes to enforcement 3. Digitisation of the REC Theft Calculator to better support detection and onsite theft assessment <p>Energy theft presents serious public safety risks, including fire, electrocution, and explosions. Increasing public awareness ensures that consumers recognise these dangers and are more likely to report tampering or unsafe activity. At the same time, stronger referral pathways and improved onsite assessment tools will enable faster and more consistent action across the market.</p> <p>The benefits extend across three key areas:</p> <ol style="list-style-type: none"> 1. Consumer Safety: Reduces injury and property risk through education, deterrence, and improved reporting routes 2. Behavioural Change: Makes energy theft socially unacceptable, discouraging tampering before it occurs 3. Market Assurance & Enforcement Support: Strengthens RECCo’s leadership on energy safety by improving intelligence quality and supporting industry parties with better assessment tools <p>Expected outcomes for FY2026–27 include:</p> <ul style="list-style-type: none"> • National awareness uplift from 7% to 10–11%, with continued growth to 14–18% by FY2030 • Sustained increase in reporting volumes, reflecting greater awareness and consumer confidence • Strengthened referral and intelligence quality through Crimestoppers’ exploration, enabling improved triage and analysis and supporting escalation to enforcement routes • A digitised Theft Calculator that enables revenue protection and theft detection teams to make consistent, onsite assessments across various devices and platforms. <p>Together, these outcomes contribute to the long-term reduction of unsafe processes, improve public safety awareness, and strengthen confidence in industry response mechanisms.</p>

<p>Deliverables & Outputs</p>	<p>The campaign will deliver a structured phased, set of activities that expands Stay Energy Safe nationally, strengthens intelligence pathways through Crimestoppers, and improves industry tools for theft assessment and detection.</p> <p>Key deliverables</p> <p>Stay Energy Safe Growth Campaign</p> <ul style="list-style-type: none"> • National TV campaign: Rollout Unknown Danger creative for the first national broadcast, delivering strong reach and message recall • OOH visibility: Digital and static placements reinforcing broadcast messages and maintaining awareness between TV bursts • PR & influencer engagement: Credible, peer-led content amplifying safety messages and community dialogue • Always-on digital presence: SEO, paid social media, and web optimisation ensuring sustained reporting access • Impact tracking & research: Ongoing measurement of awareness, recall, and behavioural change to support continuous improvement. <p>Crimestoppers Discovery Activity</p> <ul style="list-style-type: none"> • Scoping and discovery with Crimestoppers to explore options for enhanced assessment and validation • Identification of opportunities to link energy theft referrals with wider crime intelligence, supporting escalation to enforcement routes where appropriate • Recommendations to inform a suitable and scalable pathway aligned with the ETES pilot <p>Theft Calculator Digitalisation</p> <ul style="list-style-type: none"> • Consultation with industry parties to capture requirements and ensure the tool supports consistent theft assessment across a wide range of operational settings • Review and update the underpinning data, assumptions, and methodology to ensure alignment with ongoing changes in the energy industry and evolving market conditions • Documentation of functional and technical requirements to enable the Theft Calculator to be accessed and used consistently across platforms and devices • Digitisation and prototype development, including usability testing to validate the updated tool design and ensure it supports practical adoption by REC Parties and field teams • Recommendations and roadmap for implementation, including governance requirements for ongoing updates and version control to maintain accuracy over time <p>This will ensure the Theft Calculator remains fit for purpose, supports consistent theft assessment across the market, and can be updated efficiently as the industry evolves.</p>
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	<p>Timescales and milestones</p> <ul style="list-style-type: none"> • FY2026–27: Launch national campaign (TV, OOH, PR, digital); monitor awareness, and report growth • FY2026–27: Engage with REC Parties to understand requirements for digitised Theft Calculator, document requirements, and commence market testing • FY2026–27: Engage with Crimestoppers to identify scope for enhanced assessment and implement identified discovery activity • FY2027–28: Refresh creative and expand community pilots based on audience insight • FY2028–29: Scale deterrence messaging nationally with new creative and sustained media presence <p>This structured approach supports RECCo’s long-term planning framework, ensuring efficient use of funding, evidence-based evaluation, and alignment with REC objectives for market assurance and consumer protection.</p>
<p>Objectives</p>	<p>The growth solution seeks to advance RECCo’s energy theft marketing strategy by:</p> <ul style="list-style-type: none"> • Raising national awareness of energy theft dangers and safety risks • Preventing harm through deterrence and education • Encouraging reporting of meter tampering or suspicious activity via Stay Energy Safe • Maintaining trust in the energy industry through open communication and collaboration • Improve the quality, assessment, and validation of energy theft intelligence through exploration with Crimestoppers, supporting effective referral pathways and enforcement opportunities • Improve theft assessment capability and consistency by digitising and updating the Theft Calculator so it can be used across platforms and devices, and ensuring the underpinning data and methodology remain aligned to evolving energy market conditions <p>These objectives directly align with the Retail Energy Code’s goals to protect consumers, enhance confidence, and ensure the safe, efficient operation of the retail energy market.</p>
<p>Options</p>	<p>Stay Energy Safe growth campaign delivery options</p> <p>The following delivery options relate specifically to the Stay Energy Safe national awareness campaign component of the Energy Theft Programme 2026/27. The Crimestoppers discovery activity and Theft Calculator modernisation are proposed as enabling projects delivered alongside the campaign, irrespective of which campaign option is selected.</p> <p>Three delivery options were assessed to determine the most effective approach:</p> <ol style="list-style-type: none"> 1. Growth Solution (Recommended): A national multi-channel campaign across TV, OOH, PR, and digital

	<ul style="list-style-type: none"> • Cost: £1.0m (including £0.5m incremental investment) • Impact: Highest reach and recall, achieving national awareness growth and long-term deterrence <p>2. Broadcast Test: Regional pilot of TV and broadcast media</p> <ul style="list-style-type: none"> • Cost: £0.8m • Impact: Moderate, geographically limited; insufficient to drive nationwide safety awareness <p>3. Status Quo: Continue existing digital and radio activity only</p> <ul style="list-style-type: none"> • Cost: £0.6 (including Consumer Price Index increase) • Impact: Low; awareness and engagement expected to plateau or decline <p>Preferred Option</p> <p>Option 1: The Growth Solution delivers the greatest impact on consumer safety, awareness, and behaviour change, aligning directly with making energy theft socially unacceptable and safeguarding the public.</p>
<p>Value for Money</p>	<p>The Growth Solution represents a responsible and proportionate investment that maximises consumer safety outcomes relative to cost.</p> <ul style="list-style-type: none"> • Total FY2026–27 budget: £1.0m including investment of £0.5m to fund national TV, OOH, and PR • Cost per person reached: £0.005 <p>This investment will extend Stay Energy Safe’s reach to over 220 million individuals while ensuring measurable growth in awareness, engagement, and reporting. The approach demonstrates value for money not through financial recovery, but through the prevention of harm, improved consumer confidence, and strengthened compliance with REC principles of efficiency, transparency, and accountability.</p>
<p>Stakeholder Engagement</p>	<p>The proposed Growth Solution reflects industry and RECCo stakeholder consensus, as confirmed through the 2025 Energy Theft Planning Workshop. Parties emphasised the need for sustained national awareness, greater public deterrence, and visible industry leadership on safety.</p> <p>Ongoing collaboration with suppliers, networks, and consumer advocacy partners will ensure alignment with REC obligations and maximise impact through shared promotion and consistent messaging across the sector.</p>

Expenditure Plan

Budget Breakdown	The proposed FY2026–27 Theft investment is:		
	Budget area	Amount (£ million)	Description
	Change Allowance	0.1	Crimestoppers Discovery
	Sundry Projects	0.1	Digitised Energy Theft Calculator discovery phase
	Stay Energy Safe Marketing	1.0	Core marketing and promotion and investment allowance

Cost–Benefit Analysis	<p>The projected ROI for FY2026–27 is 15:1, based on insights from previous campaign performance and independent industry data.</p> <p>This ratio represents not financial gain for REC Parties, but the value returned through theft detection, consumer protection, and harm prevention.</p> <p>This cost benefit model relates to the Stay Energy Safe campaign investment and does not quantify the enabling benefits of the Crimestoppers discovery activity or Theft Calculator modernisation, which support wider detection and enforcement capability.</p> <p>Model overview:</p> <ul style="list-style-type: none"> • Projected reports: 16,166 (+25% year-on-year increase) • Approximately 50% conversion to confirmed theft (industry benchmark) • Equivalent of 8,083 validated cases, valued conservatively at £2,000 each in recovered or prevented loss • Total recouped value: ~£16.2 million against £1.0m investment <p>This model demonstrates that for every £1 invested in awareness, £15 of value is realised across the market, not as profit, but as costs avoided, safer outcomes for consumers, and improved integrity of the energy system.</p> <p>The ROI calculation also does not capture non-financial benefits, such as:</p> <ul style="list-style-type: none"> • Reduced risk of injury, fire, and carbon monoxide exposure • Increased public understanding of energy safety • Enhanced confidence in the retail energy market
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	<p>These wider benefits represent the true long-term value of the campaign and align directly with RECCo’s objectives to protect consumers and promote confidence in energy supply arrangements under the REC.</p>
<p>Assumptions</p>	<p>The cost–benefit and return on investment model is based on the following assumptions, as validated in the Growth Strategy document:</p> <ul style="list-style-type: none"> • Reports baseline: 12,933 (FY2025–26) • Awareness uplift: 7% → 10–11% (FY2026–27) • Conversion rate: 50% of reports validated as confirmed theft • Value per case: £2,000 (reflecting current energy price benchmarks) • Inflation: 3.9% cost-of-living adjustment applied across the base budget <p>These assumptions will be reviewed annually to ensure consistency with industry performance data and to maintain transparency in reporting outcomes.</p>

Risk Analysis

Project Risks

- 1. Campaign Effectiveness (medium)**

There is a risk that national awareness uplift may be lower than projected if television or OOH channels underperform or if external factors reduce audience attention.

Mitigation: Implement phased rollout with close monitoring, use national and regional awareness tracking, and reallocate spend across channels as required to maintain performance.
- 2. Resource Capacity (medium to high)**

The Energy Theft team lost an SME in 2025, and BH&P is a small organisation. Delivering a campaign of this scale introduces operational and resourcing pressures.

Mitigation: Set clear delivery milestones and conduct regular campaign progress updates in addition to the monthly performance reviews.
- 3. Reputational Risk (low)**

If messaging is not communicated clearly, there is a risk it could be misunderstood as focusing on blame rather than safety.

Mitigation: All creative and messaging will be reviewed and approved by RECCo and Crimestoppers prior to release to ensure it remains factual and focused on consumer safety.
- 4. Measurement & Reporting (low)**

Introducing new national broadcast and OOH channels may complicate year-on-year comparison with previous digital-only campaigns. In addition, the Energy Theft Programme includes enabling initiatives (Crimestoppers discovery activity and Theft Calculator digitalisation), whose outcomes are measured through delivery milestones rather than changes determined through reporting volumes.

Mitigation: Use consistent independent tracking to ensure continuity and reliability of awareness and reporting metrics. Define measurable outputs for Crimestoppers discovery and the Theft Calculator digitalisation work and report progress through programme governance.
- 5. External Environment (medium)**

Ongoing cost-of-living pressures or energy-price sensitivity may influence public perception of the campaign.

Mitigation: Maintain focus on consumer and community safety rather than financial loss; schedule activity to maximise message relevance and receptiveness.
- 6. Delivery & Scope Definition (medium)**

There is a risk that the Theft Calculator modernisation work expands beyond the defined requirements and documentation stage, creating scope creep and delivery uncertainty.

Mitigation: Define clear deliverables and governance for FY2026–27, including requirements capture, methodology refresh and prototype validation; agree boundaries for build and implementation as a separate decision point.

	<p>7. Data Governance & Industry Alignment (medium) There is a risk that REC Parties do not align on the updated data inputs and assumptions required for the Theft Calculator, resulting in delays or inconsistencies in outputs. Mitigation: Establish a working group with representative REC Parties and agree a consistent methodology, version control, and annual review process.</p> <p>8. Dependency Risk: Crimestoppers (low to medium) There is a risk that the scope and effectiveness of the Crimestoppers exploration activity is constrained by external dependencies, including referral processes and information sharing requirements. Mitigation: Define clear discovery objectives and success measures early, ensure legal and governance pathways are reviewed, and align with learnings from the ETES pilot.</p> <p>9. Benefits Realisation (medium) There is a risk that the enabling initiatives (Crimestoppers’ exploration and Theft Calculator modernisation) do not realise measurable benefits within FY2026–27, as they are primarily discovery and requirements led. Mitigation: Define measurable outputs for FY2026–27 (requirements, recommendations, prototypes, governance), and establish a clear roadmap for subsequent implementation and tracking.</p>
<p>Mitigation</p>	<p>Set out above</p>

Implementation Plan

Timeline	<p>End of November 2025: Budget for 2026–27 signed off</p> <p>December 2025 – January 2026: KPIs reviewed and agreed</p> <p>February 2026: Contract for FY2026–27 updated</p> <p>March 2026: Activity plan for FY2026–27 review</p> <p>April 2026: Commence new contract</p>
Resources	<p>Internal RECCo Theft operational team supported by internal and external subject matter experts</p> <p>Crimestoppers</p> <p>Becky Holland & Partners (marketing agency)</p> <p>Energy Savings Trust</p>

Conclusion

Energy theft remains a significant public safety issue, posing risks of electrocution, fire, and explosions. Each year, an estimated £0.9–£1.4 billion worth of energy is stolen across Great Britain, indirectly increasing costs for all consumers. Addressing Energy Theft remains a key priority for RECCo and the three activities proposed for its 2026–27 Energy Theft Programme are integral to that.

Inclusion of this Budget will allow us to build on the key learnings of the CoLP partner's ETES trial, respond to industry needs for the Theft Calculator, and deliver a marked and measurable improvement in theft awareness marketing – strengthening public safety, fostering lasting behaviour change, and make energy theft a behaviour that is recognised as both unsafe and socially unacceptable.



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