Connected Kerb

Submission to the Australian Energy Market Commission

Electricity network regulation review Package 1

- **ERC0435 – National Electricity Amendment (Clarifying distribution ringfencing in emerging energy markets) Rule 2027**
- **ERC0437 – National Electricity Amendment (Enabling distribution network service provider led electric vehicle charging infrastructure) Rule 2027**

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Executive Summary

Consumers should be able to buy electricity for their EV from the same competitive electricity market that supplies their home.

The central question is whether public kerbside charging becomes another commercial layer sitting on top of Australia's electricity market, requiring consumers to purchase electricity through the owner of the charging infrastructure, or whether the charging infrastructure becomes part of the electricity system, allowing consumers to continue buying electricity through the competitive electricity market.

Connected Kerb believes the uptake of electric vehicles in Australia will be best served by delivering reasonable and sustainable value to consumers. That value is best delivered by integrating public kerbside charging infrastructure into the electricity system while preserving full competition in the retail supply of electricity. Regulating the infrastructure while maintaining competition in the sale of electricity delivers the lowest cost infrastructure, the greatest retail competition and the widest range of consumer offerings, and in turn increases long term consumer commitment to EVs.

The technical ability to deliver this already exists. What is required now is the right regulatory framework.

Regulate the infrastructure. Compete on electricity. Deliver the lowest cost to consumers.

Key Messages

- **This submission builds on Connected Kerb's earlier submission to ERC0436.**
  That earlier submission addressed a slightly different question but reached substantially the same conclusions. It set out our position on the long term design of Australia's EV charging market, summarised in Section 2.

- **Regulate the infrastructure. Compete on electricity. Deliver the lowest cost to consumers.**
  Owning the infrastructure and selling electricity are separate businesses, with different economics. Whatever model is finally adopted, ownership of the infrastructure must be separated from the sale of electricity through it. This separation is the cornerstone of competition. The AER has an established framework to ensure infrastructure investment and pricing are efficient and prudent. The electricity market is fundamentally based on the fact that consumers have the right to choose their supplier, and it is that choice that benefits them, not who owns the infrastructure.

- **Recent developments in metering make this possible.**
  Separating ownership of the infrastructure from the sale of electricity through it is what makes open access charging possible. This is already operating: CitiPower, Powercor and United Energy are applying an open access model under their AER ring fencing waiver, allowing multiple EMSPs and service providers to access the same DNSP owned charging infrastructure and compete for customers. Type 9 metering, introduced by the AEMC and commencing on 31 May 2026, provides the foundation for the next logical step: giving consumers pricing competition at any public charger through a dynamic FRMP arrangement

(virtual NMI), rather than being tied to the service provider operating that site. Connected Kerb is already working with Metering Coordinators and Meter Data Providers to develop this capability. However, delivering it will require investment in the metering, data and settlement systems needed to support efficient market settlement through AEMO's existing processes. That investment will only occur if supporting this capability is an obligation within the market, rather than an optional enhancement. Without that obligation, there is a significant risk that Type 9 metering will be deployed without delivering its full competitive potential for consumers.

- **Bundling ownership of the charger with the sale of electricity through it creates a monopoly layer above the market.**

  Where the owner of a charging point is also the only seller of electricity through it, the consumer is tied to that owner and cannot access competitive pricing from other sources. That bundling creates a captive point of sale, a commercial chokepoint with the pricing power of a monopoly, regardless of how competitive the broader retail electricity market is. This is a structural feature of the current model, not a reflection of Charge Point Operators.

- **The current model is structurally dependent on grants and premium pricing.**

  Significant economic value is created by EV ownership, but the kerbside charger captures only a small part of it. An electric vehicle increases a household's electricity consumption wherever it charges, creating a long term customer relationship with ongoing electricity demand. By contrast, a public kerbside charger supplies only a small proportion of an EV's lifetime electricity consumption. Recovering the full cost of charging infrastructure from that relatively small volume of electricity inevitably requires government grants and premium electricity prices to remain commercially viable. Equalising site access fees alone is unlikely to change this outcome, as those costs are small compared with the level of grant funding and premium pricing required. A more robust market structure is one that allows the consumer to capture the full value of the ongoing electricity relationship created by EV ownership, rather than attempting to recover infrastructure costs from the relatively small proportion of charging that occurs at the kerb.

- **Kerbside charging extends the electricity market.**

  Kerbside charging enables EV ownership for households without access to off street parking, but its role extends well beyond those consumers. Visible, accessible public charging gives people confidence that owning an EV is practical, making it an important part of the transition to electrified transport. Because of that role, charging needs to put its best foot forward on price, competition and innovation. In practice, this means consumers should be able to see competitive pricing and real choice at every charger. They should also see that it has the potential to bring together the rest of their household energy experience and drive innovation across all of their electricity use, not just the charging session at the kerb. They should simply continue buying electricity wherever they need it, through the same competitive electricity market.

- **Deployment should be a regulated obligation.**

  Infrastructure should be deployed through a cap and collar framework that ties the required level of infrastructure to a ratio of chargers to EVs on the road, rather than the availability of government grants. The cap sets the maximum level of deployment, preventing over-investment in infrastructure the market does not yet need. The collar sets the minimum level, ensuring deployment keeps pace with EV uptake rather than lagging behind it. Both can be calibrated against established international practice. A grant based model is inherently discretionary, with deployment determined by government budget cycles rather than the number of EVs on the road. By contrast, a cap and collar framework is self executing: as EV adoption increases, both the cap and the collar adjust accordingly, widening the range of chargers that DNSPs are required to deploy. This provides flexibility in delivery while ensuring infrastructure deployment keeps pace with EV adoption. Regulated funding should be matched by regulated

accountability. DNSPs should have an obligation to deploy the right number of chargers in the right locations, demonstrate that those assets are being effectively utilised, and relocate chargers at their own expense where utilisation targets are consistently not met. This ensures consumers pay for infrastructure that responds to demand, rather than infrastructure deployed simply because grant funding was available.

- **Connected Kerb supports the ENA proposal in principle.**

  We support DNSP led deployment, supported by open access metering, mandatory open access, utilisation obligations, a cap and collar deployment framework, and continued competition in the retail sale of electricity.

Section 1 – The Long Term Consumer Outcome

This submission considers the two rule change requests currently before the Commission and how they should be applied to achieve the best long term outcome for electricity consumers, consistent with the National Electricity Objective.

The debate is often framed as whether DNSPs should own public kerbside charging infrastructure or whether deployment should be left entirely to Charge Point Operators. Connected Kerb considers that this is not where the debate should start, it is where it should finish. The practical question is what price Australians should pay for electricity to charge their electric vehicles, and what system best delivers that outcome. Achieving it requires asking whether ownership of the infrastructure should be separated from the sale of electricity through it. Should consumers purchase electricity through a separate charging industry, or should EV charging become another part of Australia's competitive electricity market, just like every other form of household electricity consumption? The answer to that question determines whether consumers continue to benefit from competition in electricity prices wherever they charge, or whether they must instead purchase electricity through a separate charging market.

That distinction matters because electric vehicles are becoming part of the electricity system, not simply another transport technology. As EV adoption grows, household electricity consumption will increase significantly. The market structure adopted today will determine where competition occurs, how infrastructure is funded and, ultimately, the price consumers pay for electricity for decades to come.

The value of kerbside charging should be measured by the EV ownership it enables, not by the revenue generated through each charging transaction. That distinction underpins this submission. Visible, reliable public charging gives people confidence that owning an EV is practical, in much the same way a widespread fuel network underpins confidence in buying a petrol vehicle, regardless of which service station a driver ultimately uses: it is that confidence, not the charging transaction itself, that drives EV uptake. Kerbside charging's contribution should therefore be judged by looking at the household's whole commercial relationship with the electricity system, not the relatively small proportion of that relationship that happens to occur at the kerb.

However, availability alone is not enough. The electricity supplied through that infrastructure should be capable of being offered through the same competitive electricity market, enabling competition through price, tariffs, bundled products and other innovative services. The necessary market arrangements should support participation by retailers, EMSPs and other authorised market participants without requiring separate market structures or bespoke systems. Public charging should therefore become an extension of the competitive electricity market, rather than a separate premium-priced service. Consumers should be able to access the benefits of that competitive market wherever they charge. Premium pricing will continue to have a role where consumers choose additional value, such as faster charging, greater convenience or other differentiated services.

The household's relationship with electricity has also become more sophisticated. What was once a single connection at the home can now extend across rooftop solar, batteries, EVs and other distributed energy products, each forming part of the same household relationship. Bringing these products together within a single electricity relationship allows consumers to benefit from the interactions between them, rather than treating each as a separate service. Kerbside charging is not only a demonstration to the market that EV ownership is viable. It also demonstrates how that more sophisticated, integrated household energy relationship can work in practice, extending that relationship beyond the home to strengthen competition, encourage innovation and support the transition to an increasingly electrified energy system.

Bundling infrastructure ownership with electricity retailing creates a chokepoint above the competitive market, regardless of how much competition exists among electricity suppliers, EMSPs or other participants more broadly. As a result, consumers using a kerbside charger cannot generally access the same competitive market that exists elsewhere in the electricity system. The issue is therefore not a lack of competition in the electricity market itself, but that the market is unable to reach the point where the electricity is being sold.

Bundling is not a shortcoming in Charge Point Operator capability — it is what the current CPO model requires. With so few charging events at any one kerbside charger, the revenue base is too narrow to recover capital costs on its own, so Charge Point Operators depend on government grants to help meet those costs and on the ability to earn a premium on the electricity price to service the asset. Bundling ownership of the charger with the sale of electricity is what allows that premium to be captured. Simply requiring separation without also changing how infrastructure costs are recovered would remove that margin and place additional strain on an already fragile model. That is why this submission recommends DNSP ownership specifically, not separation in isolation: a model that separates infrastructure ownership from electricity retailing only works if it also shifts infrastructure cost recovery to a regulated asset base, in the same way as other network assets, while electricity itself continues to be sold competitively.

Recent developments in metering make that separation possible in practice, as set out above. Realising this capability requires targeted enhancements to the existing metering, data and settlement arrangements so that charging sessions can be allocated to the customer and settled through the existing market processes, rather than a new settlement system altogether. Once that capability is in place, market participants can simply build on the existing arrangements rather than developing separate systems or business processes of their own. Competition will then develop naturally where it delivers the greatest value to consumers: in the ongoing price and supply of electricity, rather than in ownership of the charging asset.

Connected Kerb's experience

Connected Kerb is one of the largest Charge Point Operators of kerbside EV charging infrastructure in the United Kingdom. We build, own and operate charging infrastructure in a mature market. Over the past two years Connected Kerb Australia has worked with electricity networks, retailers, metering providers, software providers and regulators to understand how EV charging can be integrated into Australian electricity market arrangements. We are practitioners, and our observations are based on commercial experience.

Section 2 – Summary of Connected Kerb's Submission to ERC0436

Connected Kerb made an earlier submission to ERC0436. It would be useful to read this submission alongside that one: the earlier submission addressed a slightly different question but reached substantially the same conclusions, and this submission builds on it.

That earlier submission considered how public AC kerbside charging should be integrated into Australia's electricity market to deliver the best long term consumer outcome. This submission considers the next question: if that market design is accepted, what ownership and regulatory framework is required to implement it?

The earlier submission concluded that the current public charging business model attempts to recover infrastructure costs from a very narrow revenue base. Public AC kerbside charging typically accounts for only 5 to 10 per cent of EV charging events, operates at utilisation rates of around 7.5 to 15 per cent, commonly requires government grants covering 30 to 80 per cent of capital costs and, despite that support, typically charges consumers 1.5 to 2 times prevailing household electricity prices. By contrast, the electricity industry benefits from 100 per cent of EV charging events and all of the electricity demand created by EV ownership, regardless of where charging occurs. Its revenue base is therefore substantially broader, allowing infrastructure costs to be recovered more efficiently and with significantly lower commercial risk.

The earlier submission also concluded that recent metering developments create the opportunity to separate ownership of charging infrastructure from the retail supply of electricity. Consumers are therefore no longer tied to the owner of the charger when purchasing electricity. Infrastructure can be economically regulated while electricity remains fully competitive. DNSP ownership was not the starting proposition of ERC0436. It was the logical consequence of that market design. This submission considers the rule changes now before the Commission through that lens.

Read together, those conclusions point to six implementation recommendations, developed further in the responses below:

- DNSP ownership and delivery on an open access basis.
- Regulatory certainty and funding continuity independent of standard five year reset cycles.
- Future ready technical standards, including Type 9 metering, dynamic FRMP capability (virtual NMI) and ISO 15118 readiness, delivered as obligations rather than options.
- Evidence based site selection.
- A cap and collar framework tying deployment to EV uptake.
- Ongoing utilisation testing, under which a DNSP must relocate underperforming assets at its own cost, not recoverable through the regulated asset base.

These recommendations commit the Commission and industry to a long term direction, DNSP led infrastructure, competitive retail, and metering enabled separation, without requiring every implementation detail to be settled in advance. The cap and collar framework and utilisation testing built into these recommendations are what make that possible: they let deployment track actual EV uptake and correct course if a site or an assumption turns out to be wrong, without having to unwind the underlying market structure to do it. An alternative model that bundles infrastructure ownership and electricity retailing into a single commercial structure cannot offer that same flexibility, because correcting course under that model means unwinding the commercial relationship itself, not simply adjusting deployment within it. Once capital, contracts and consumer relationships are built around a bundled structure, that correction becomes far more difficult.

Section 3 – Responses to Consultation Questions

This submission responds to each of the consultation questions. Where a question falls outside our area of focus, we say so briefly rather than offering a view we are not equipped to hold.

Connected Kerb is a Charge Point Operator, not an electricity market participant, and we do not hold ourselves out as experts in the detailed operation of the regulatory framework. If we have misconstrued any aspect of the questions below, we apologise and would welcome the opportunity to discuss our observations further. To remove any ambiguity in how we answer the questions, it is worth stating plainly how we read the two rule change requests and where Connected Kerb stands:

- Nexa seeks to strengthen the distribution ring fencing arrangements, elevating the obligations from the AER's guideline into the NER and restricting waivers, with the practical effect of limiting DNSP involvement in kerbside charging.
- The ENA seeks the opposite outcome, changing the service classification provisions of the NER so that DNSPs can deploy, own and maintain kerbside EVCI permanently as a regulated service.
- Connected Kerb supports the outcome the ENA is seeking, together with key elements of Nexa's proposed ring fencing framework: DNSPs should be able to deploy kerbside charging permanently, and the ring fencing rules governing their conduct should be clear, national and set out in the NER rather than negotiated waiver by waiver. Ring fencing should not operate as a barrier to DNSP deployment. It should provide the framework that makes DNSP deployment safe, by ensuring the DNSP owns the infrastructure but never sells the electricity. We also consider that the regulatory framework should require the metering, data and settlement capability needed to allow electricity supplied through public chargers to participate fully in the competitive electricity market. Delivering that capability requires investment and should form part of the regulated market framework, rather than being left as an optional enhancement. Where we agree with Nexa is on the areas that need tightening. As recognised by the AER during its consideration of the CitiPower, Powercor and United Energy ring fencing waiver, DNSP led deployment of kerbside EVCI requires an effective ring fencing framework to address self preferencing and other competitive neutrality risks.

The ring fencing framework will continue to evolve as experience is gained, but the need to refine it should not delay establishing a clear pathway for DNSP deployment.

Question 1 – Prioritisation framework for the Review

Do you have any feedback on our approach to the Review, including the proposed prioritisation framework?

Answer: - Connected Kerb supports the proposed prioritisation framework. In our view, the Commission's highest priority should be to preserve and extend competition in the supply of electricity, because that is what will deliver the greatest long-term benefit to consumers. The framework should therefore favour solutions that maintain competitive pricing, encourage innovation and preserve future market optionality, while avoiding market structures that embed unnecessary costs or restrict consumer choice. This last point deserves particular weight: the commercial and technical relationship between EVs, household electricity consumption and distributed energy resources is evolving rapidly, and the preferred regulatory pathway should therefore be one that allows the market to adapt as those relationships mature, rather than locking in a structure that may prove difficult to unwind. The DNSP led model supported in this submission preserves that flexibility because infrastructure, market capability and competition can evolve alongside EV uptake.

Question 2 – What network services should be subject to economic regulation and are changes to the service classification framework required?

Do you think there are any circumstances in which it would be in the long term interests of consumers for NSPs to provide regulated services in contestable markets? If so, please explain what those circumstances are, how this would work in practice, and how the framework should limit the ability of networks to leverage their regulated monopoly position to limit competition in contestable markets.

Answer - Connected Kerb's interest in this question is narrow. Our answer is yes. There are circumstances where it is in the long-term interests of consumers for a DNSP to provide a regulated service that supports a competitive market. The critical distinction is between the infrastructure and the service provided through it. The infrastructure may be a regulated asset, while the electricity supplied through it remains fully competitive. In the case of public AC kerbside charging, the infrastructure should be economically regulated, while the retail sale of electricity remains fully competitive. Consumers should be able to choose who supplies their electricity regardless of who owns the charging infrastructure. The risk to competition arises when ownership of the infrastructure and the retail sale of electricity are bundled together. In that circumstance, the owner of the charger also controls the consumer's electricity relationship. Separating those functions removes that risk. The regulated infrastructure supports competition rather than replacing it.

Question 3 – Are changes required to the ring fencing arrangements?

How effective do you think the ring fencing obligations and waivers have been to date, and what changes, if any, are required to ensure they remain fit for purpose in the future?

Answer - Ring-fencing appears to have broadly achieved the purpose for which it was designed. It has helped preserve competitive neutrality by separating regulated network businesses from contestable activities. However, the emergence of EV charging demonstrates that the framework now needs to evolve.

In our view, public AC kerbside charging is fundamentally different from the contestable services the existing arrangements were designed to address. Keeping charging infrastructure outside the regulated network has had significant commercial consequences. It has slowed deployment, increased reliance on government grant funding, and contributed to electricity prices that are substantially higher than household electricity prices for the consumers who depend most on public charging.

The answer is not to weaken ring-fencing, but to adapt it. DNSPs should be able to own and deploy charging infrastructure as a regulated network asset, while robust ring-fencing continues to ensure they do not participate in the competitive supply of electricity. The AER's ring fencing waiver for CitiPower, Powercor and United Energy has already proven that an open access model can work in practice at the charge point. That evidence should now be built on, not treated as a one-off exception: the logical next step is to codify that model in the NER rather than continuing to rely on waivers granted case by case.

The pace of change also matters more than it once did. Innovation in EVs, metering and electricity markets is occurring much faster than traditional regulatory cycles. Refining the ring-fencing arrangements will necessarily be an iterative process, but the framework must be capable of adapting as the market develops. Regulatory arrangements that take years to evolve risk holding back innovation and delaying benefits to consumers.

Question 4 – Are changes required to the connection and/or facility access arrangements?

Do you think the current connection and/or facility access arrangements are acting as a barrier to entry into contestable markets? If so, how? Do you think changes are needed to the regulatory framework for negotiating connections and/or facility access arrangements?

Answer - In our experience, connection arrangements appear both complex and expensive. We have certainly encountered some eye-watering connection costs. However, we recognise there are multiple factors that influence those costs, many of which extend well beyond the electricity sector. Construction costs, supply chain constraints, broader infrastructure demand and network investment requirements will all influence the final cost of providing a connection, and many of these issues are currently the subject of wider public debate. We are therefore not in a position to judge whether current connection charges are appropriate.

As a commercial participant, we will naturally always argue that lower costs are preferable. More important, however, is that connection pricing is transparent, consistently applied and provides sufficient certainty for businesses to make investment decisions. If the costs are justified, industry can develop commercial models that work within those parameters. If they are not, it is appropriate for the AER to challenge them. In either case, prolonged negotiation over individual projects is unlikely to improve consumer outcomes. The priority should be to establish a framework that provides certainty, supports investment and enables practical delivery solutions.
Facility access arrangements raise a similar question of transparency and certainty, but we do not consider them to be the primary constraint on the economics of public AC kerbside charging. As set out elsewhere in this submission, those costs are relatively small compared with the structural reliance on government grant funding and premium electricity pricing required.
The more important issue is that businesses have transparency and certainty around costs. Whatever the level of the charges, the market needs to understand them, incorporate them into commercial models and then focus on delivering infrastructure to consumers. Continued debate over the cost base risks distracting attention from the structural reforms that will have the greatest impact on consumer outcomes.

Question 5 – Are changes required to the cost allocation and/or shared asset arrangements?

Do you think that changes should be made to the cost allocation and/or shared asset arrangements? If so, what changes are required?

Answer - Connected Kerb does not have sufficient expertise to comment on the detailed cost allocation methodology or shared asset arrangements. Whatever methodology is adopted should ensure that regulated consumers do not subsidise competitive electricity supply activities and that costs are allocated transparently. Our principal interest is that the framework supports the separation of regulated infrastructure ownership from the competitive retail supply of electricity, as described elsewhere in this submission.

Question 6 – Nexa rule change request. Do the ring fencing arrangements in the NER need to be strengthened?

Do you agree with Nexa's framing of the issues raised in its rule change request? Do you think there are any deficiencies in ring fencing waiver conditions, affiliate dealings and data access, branding and cross promotion, financial resilience ring fencing, or reporting, complaints and enforcement transparency?

Answer - Yes, we think the ring-fencing arrangements should be strengthened, but for quite different reasons from those advanced by Nexa. Nexa seeks to strengthen ring-fencing to limit the DNSP role. We believe it should be strengthened to support that role.
We do not agree with Nexa's framing of the issue as it applies to EV charging. The objective should not be to prevent DNSP participation. It should be to ensure DNSPs fulfil their role as regulated infrastructure providers within a framework that delivers the intended consumer outcomes.
Strengthened ring-fencing should therefore impose clear obligations on DNSPs. Those obligations should include deploying infrastructure broadly in line with EV uptake, supporting the operation of the competitive electricity market through Type 9 metering and market settlement, and ensuring consumers have access to competitively supplied electricity. The framework should also include appropriate incentives and accountability so that infrastructure is deployed where consumers need it and continues to support efficient market outcomes over time.
Properly structured, the DNSP is not a competitor in the contestable electricity market. It is the regulated infrastructure provider that enables competition in electricity supply. The purpose of strengthened ring-fencing should be to reinforce that distinction.

Questions 7 and 8 – Would Nexa's proposed solution address the identified problem, and what are the costs and benefits of that solution?

Answer - We address Questions 7 and 8 together below. Connected Kerb's views on the Nexa proposal follow directly from the conclusions reached elsewhere in this submission. We have explained why we consider the long-term consumer interest is best served by integrating public AC kerbside charging into the electricity system

through DNSP-owned, open access infrastructure while preserving full competition in the retail supply of electricity.

Against that framework, we do not consider the Nexa proposal addresses the principal issue before the Commission. Our concern is not primarily with the detailed ring-fencing arrangements, but with the risk of adopting a market structure that continues to treat public AC charging as a separate commercial charging business rather than as part of the electricity system.
In our view, that approach is likely to result in higher long-term charging prices, continued reliance on government grants, slower deployment and a less competitive outcome for consumers. It also risks embedding a market structure that becomes progressively more difficult to unwind as infrastructure, commercial arrangements and consumer expectations develop.
Connected Kerb considers there is an alternative solution more consistent with the National Electricity Objective: the DNSP-led, open access model set out in this submission. It addresses the same underlying problem, the reliance on grants and premium pricing created by bundling infrastructure ownership with electricity retailing, while preserving competition in the retail supply of electricity and avoiding the risk of a market structure that becomes harder to unwind over time.

To the extent that DNSP obligations are incorporated into the National Electricity Rules, we support a nationally consistent framework with obligations directed towards consumer outcomes, including deployment broadly aligned with EV uptake, open access, Type 9 metering and settlement capability, preservation of competition in the retail supply of electricity, and appropriate accountability for performance.

Question 9 – ENA rule change request. Do you agree with ENA that there is a problem with the roll out of EVCI?
Do you think that there is a 'chicken and egg' problem with EVs and kerbside EVCI? How material is it, is it temporary or permanent, does it apply to kerbside AC slow charging specifically, how should it be funded, do DNSPs have a cost or speed advantage over other providers, and how do you think the market will evolve?

Answer - Yes. Connected Kerb agrees there is a material chicken and egg problem, and we would go further than the ENA's framing. In our commercial experience, it is not simply a problem of charger numbers. It is a problem of price. A consumer deciding whether to purchase an EV is not simply asking whether a charger will be available. They are asking what it will cost to run the vehicle day to day. Public AC kerbside charging is currently priced at around 1.5 to 2 times household electricity rates. That is a material barrier for the households that rely most heavily on public charging, particularly those without off street parking.
We consider the problem to be structural rather than temporary. It is a direct consequence of a commercial model that must recover infrastructure costs from a relatively small number of charging events, rather than the electricity system, which captures all charging events. We do not expect that problem to resolve simply through market growth because the underlying economics remain unchanged.
Our answer is limited to public AC kerbside charging. Rapid and ultra rapid DC charging provide a premium service for which consumers reasonably expect to pay a premium price. We also recognise a separate black spot issue, particularly in regional and outer metropolitan areas, where commercial deployment may never be viable under normal market economics.
Whether DNSPs can deploy public AC kerbside charging infrastructure at a lower cost or faster than third-party providers is not, in our view, the central issue. We do not have sufficient evidence to conclude that one model is inherently lower cost or faster than the other. The more important consideration is whether the market structure delivers the consumer outcomes described throughout this submission.
Absent a change in market structure, we expect public AC kerbside charging to remain grant dependent and priced at a premium because of the underlying economics.

Question 10 – ENA rule change request. Would the ENA's proposed solution address the identified problem?

Do you consider the ENA's proposal to amend the NER to enable DNSPs to install, own and maintain EVCI on an open access basis would most efficiently address the issue identified? Should the distribution EVCI service be classified as a distribution service? Should constraints or time limits be imposed, and should DNSPs be able to recover costs through a reopener?

Answer: Yes. Subject to appropriate controls, Connected Kerb considers that the ENA proposal addresses the problem identified in Question 9.
We consider the proposed EVCI service should be treated as a distribution service. The principal benefit of the proposal arises from integrating the infrastructure into the regulated distribution system while preserving open access and competition in the supply of electricity.
The framework should impose clear obligations on DNSPs. These should include deployment broadly aligned with EV uptake, open access, Type 9 metering and settlement capability, and appropriate utilisation and relocation requirements. We also support a requirement for DNSPs to publish a deployment strategy linked to the cap and collar framework described in this submission.
We do not support an arbitrary time limit or sunset provision. The framework should operate on an ongoing basis, with deployment responding to EV uptake and underutilised infrastructure being relocated where necessary.
We support allowing DNSPs to recover efficiently incurred costs during the current regulatory control period.
Economic regulation would be beneficial if it establishes clear service standards, deployment obligations and accountability for consumer outcomes.
The only alternative is continued reliance on government grants and premium charging prices, which we do not consider sustainable.

Question 11 – ENA rule change request. What are the costs and benefits of ENA's proposed solution?
What do you consider the direct and indirect costs and benefits of the ENA's proposal would be, and are there any interdependencies, including with government policies, that the Commission should take into account?

Answer - The principal direct benefit of the ENA proposal is the pricing outcome described throughout this submission.
The principal direct cost is the addition of new infrastructure to the regulated asset base, with those costs recovered through network charges. However, as EV adoption increases, the largely fixed costs of the distribution network are recovered across a greater volume of electricity consumed, helping offset that investment over time through improved network utilisation. This reinforces the need for a deployment framework that includes clear limits and accountability. The cap and collar, utilisation testing and relocation obligations proposed in this submission are intended to ensure that investment remains proportionate to EV uptake and that consumers do not continue paying for infrastructure that is underutilised or deployed in the wrong locations.
Connected Kerb does not have a sufficiently informed view to recommend classification as either a standard control service or an alternative control service.
The principal interdependencies are with the broader market reforms discussed elsewhere in this submission. In particular, the full benefits of the ENA proposal depend on its operating alongside Type 9 metering, market settlement and competitive retail supply as part of a single, integrated market framework.

Question 12 – Assessment criteria

Do you agree with the proposed assessment criteria, which would be used for both the Nexa and ENA rule change requests and the Review? Are there any additional criteria that you think the Commission should consider?

Answer - Connected Kerb agrees that the Commission should assess the rule change requests against the National Electricity Objective. We encourage the Commission to give particular weight to whether the proposed arrangements:

- deliver the lowest long-term cost to consumers;
- support timely deployment of charging infrastructure in line with EV uptake;
- ensure competition in the retail supply of electricity;
- deliver a nationally consistent framework.

Conclusion

Connected Kerb's position across this submission and ERC0436 rests on a single view: more Australians will own EVs, in a wider range of charging environments, if the electricity they buy for those EVs is priced and supplied competitively. That is Connected Kerb's commercial interest, and it is best served by treating electric vehicles as part of the electricity system rather than a separate industry that happens to sell electricity to them. Kerbside charging should be regulated the way other network infrastructure already is, while the electricity sold through it remains fully competitive.

The case for that distinction is structural. Under the current model, bundling ownership of the charger with the sale of electricity creates a chokepoint that only grants and premium pricing can sustain, and that reliance is not a failure of any individual operator, but a direct consequence of how few of an EV's total charging events any one kerbside charger sees. A DNSP-led, open access model removes that chokepoint by recovering infrastructure costs the way other regulated network assets already are, while leaving electricity itself to be sold competitively. The evidence that this works already exists: the CitiPower, Powercor and United Energy ring fencing waiver shows an open access model operating in practice, and recent developments in metering make that separation deliverable at scale. What remains is to deliver it.

The decisions made in this Review could be difficult to unwind. Once a separate charging industry is established, with capital committed, contracts signed and consumer expectations formed around it, correcting the market structure becomes far harder than getting it right now. That asymmetry between the ease of acting now and the difficulty of correcting course later matters more than any single figure in this submission. It is why Connected Kerb considers DNSP-led deployment the safer regulatory choice: not because DNSPs are entitled to the role, but because it preserves the flexibility to adjust as EV uptake, metering capability and consumer behaviour continue to evolve, and delivers the pricing outcome consumers need.

None of this displaces premium pricing where consumers are knowingly paying for a premium service, such as destination or rapid charging. But for the everyday case of kerbside AC charging, the opportunity is for the consumer to buy the same commodity, the same way, and capture the same competitive pricing, choice and innovative products that competition already delivers.

While Connected Kerb agrees and disagrees with elements of both the Nexa and ENA proposals, the critical point for the Commission is that the National Electricity Rules need to be strengthened across three areas: an obligation on DNSPs to deploy infrastructure in line with EV uptake, an obligation that protects the competitive retail relationship, and an obligation to deliver the metering and settlement capability that allows Type 9 metering to realise its full competitive potential. Infrastructure, retail and settlement all need to be addressed in the NER, strengthening only one of the three will not deliver the outcome consumers need.