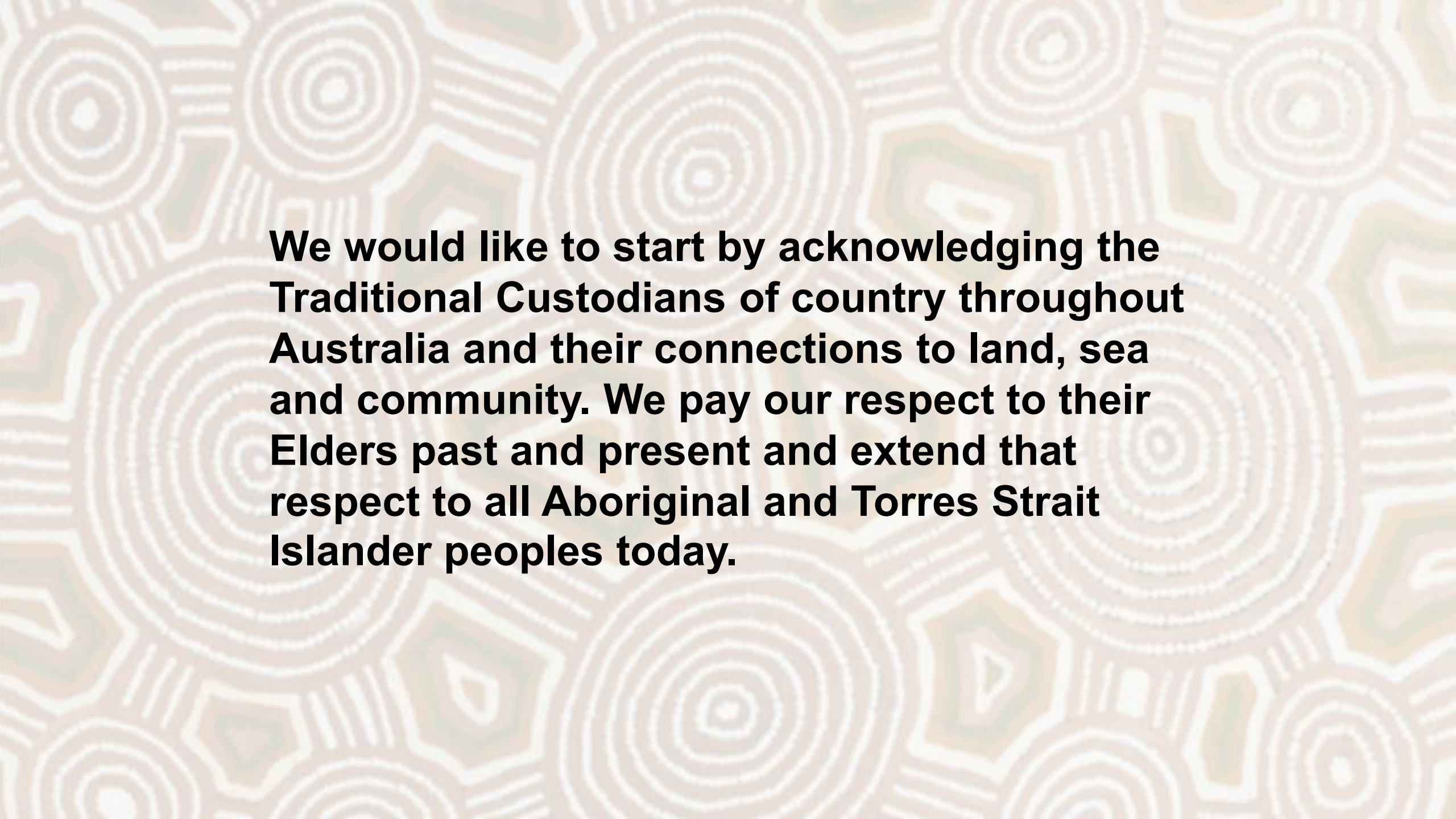


# AER workshop on Essential Energy's EV charging infrastructure ring-fencing waiver application

Tuesday 23 June 2026





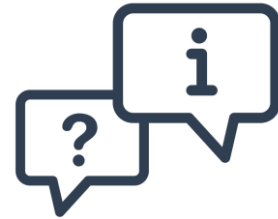
**We would like to start by acknowledging the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.**

# Milestones



Essential Energy's application received

20 April 2026



Consultation on waiver application commenced

3 June 2026



Stakeholder workshop

23 June 2026



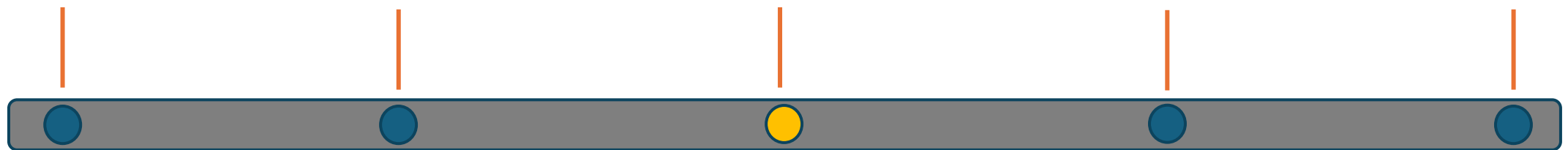
Consultation closes

14 July 2026



AER to publish its decision

Aug-Sept 2026



# Workshop format

- 1 hour workshop
- Essential Energy to make a brief presentation on its wavier proposal
- Q&A from the audience
- The AER will moderate and direct discussions as needed
  
- Please feel free to put your hand up or add any questions to the chat
- AER staff will monitor and raise issue with chair (Sara Stark)

# Essential Energy presentation



# Plug and Play EVCI Trial

AER consultation forum

23 June 2026

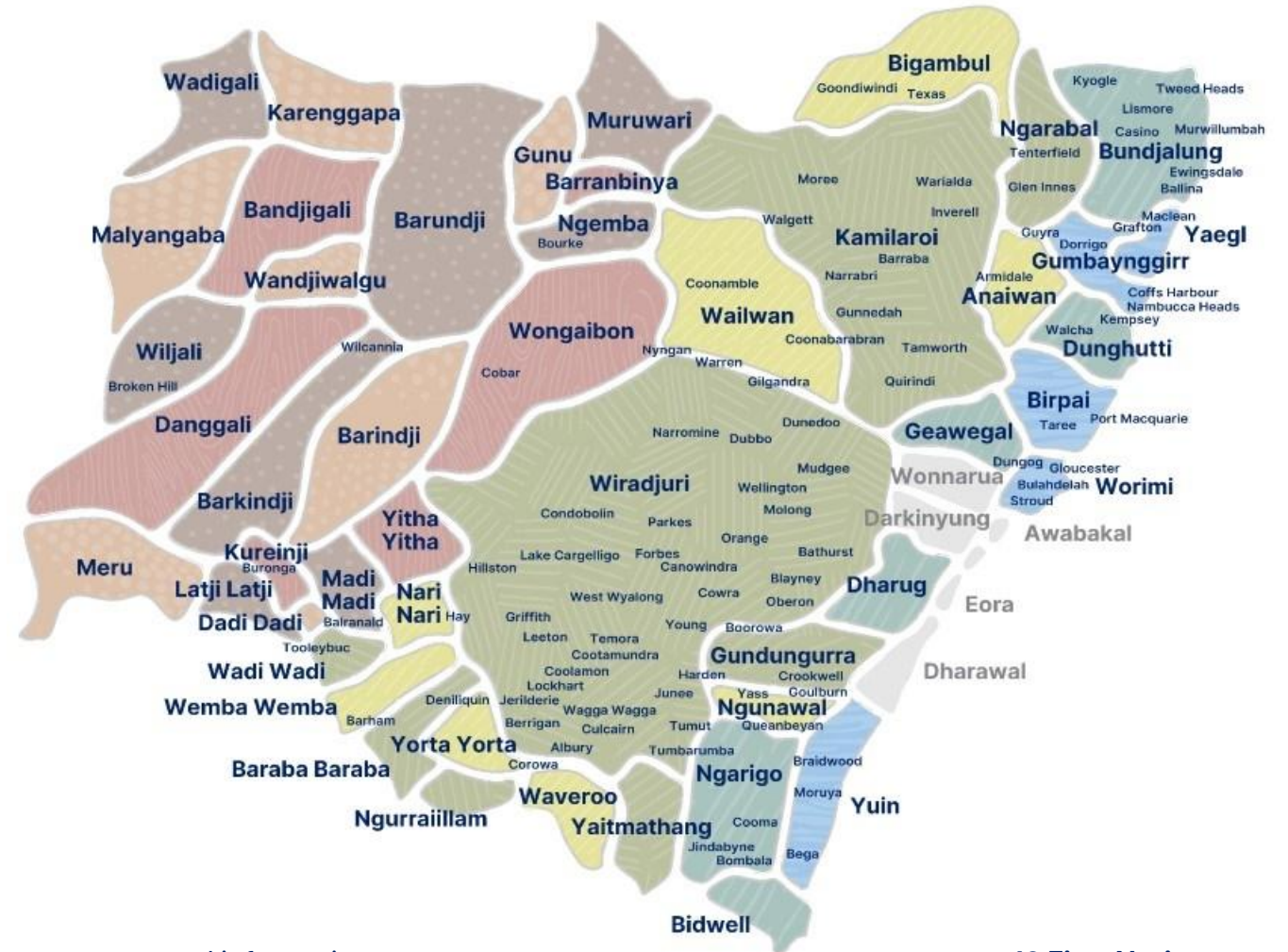


# Acknowledgement of Country

I would like to begin by acknowledging the Aboriginal and Torres Strait Islander peoples as traditional custodians of country throughout Australia and their connections to land, sea and community.

I pay my respects to ancestors and Elders past and present, and I extend that respect to all Aboriginal and Torres Strait Islander peoples, and to all present today.

I encourage you all to embrace that respect for this meeting and beyond.



For map notes and information sources see [essentialenergy.com.au/acknowledgement](http://essentialenergy.com.au/acknowledgement)

48 First Nations  
96 Depot locations



# A targeted waiver to test a regional charging market hypothesis



Australian Government  
Australian Renewable  
Energy Agency

**ARENA**

*“The Project aims to alleviate both financial and process related deployment hurdles facing CPOs to encourage faster, more efficient, more economic and more widespread asset-based destination charger rollout in regional areas, particularly in underserved areas.”*

## What it is

- ✓ Time-bound trial
- ✓ Evidence-based
- ✓ ARENA funded
- ✓ Regional NSW focus

## What it is NOT

- ✗ Regulatory reform
- ✗ Permanent DNSP role
- ✗ DNSP retail charging
- ✗ Expansion into contestable markets

A controlled experiment designed to test a market hypothesis — not a policy position.



# The question is not whether EV charging markets exist

It is whether they are delivering outcomes in regional and remote settings.

**<50**

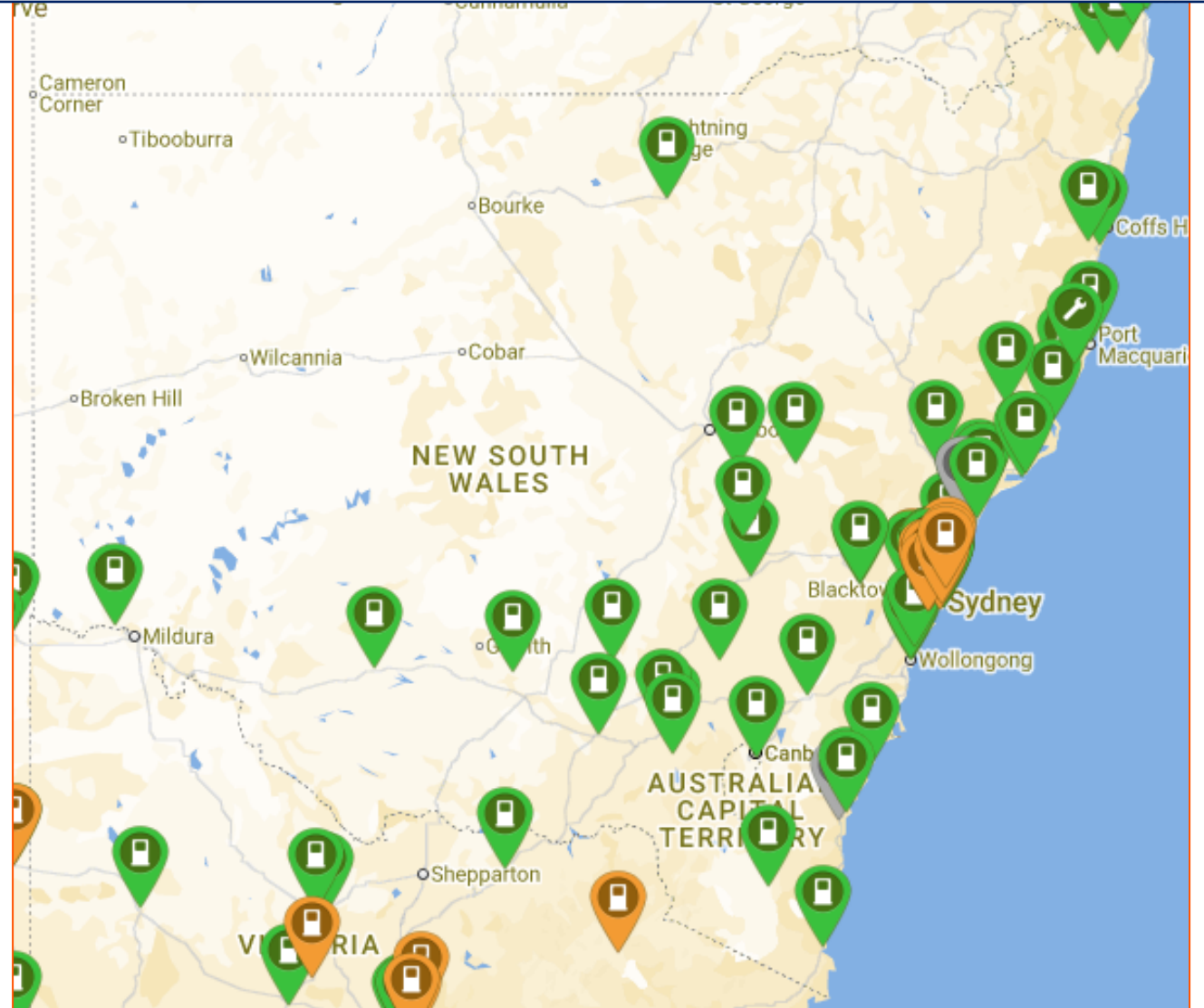
pole-mounted chargers across  
more than 750,000 km<sup>2</sup>

**~18,500**

customers per pole-mounted charger

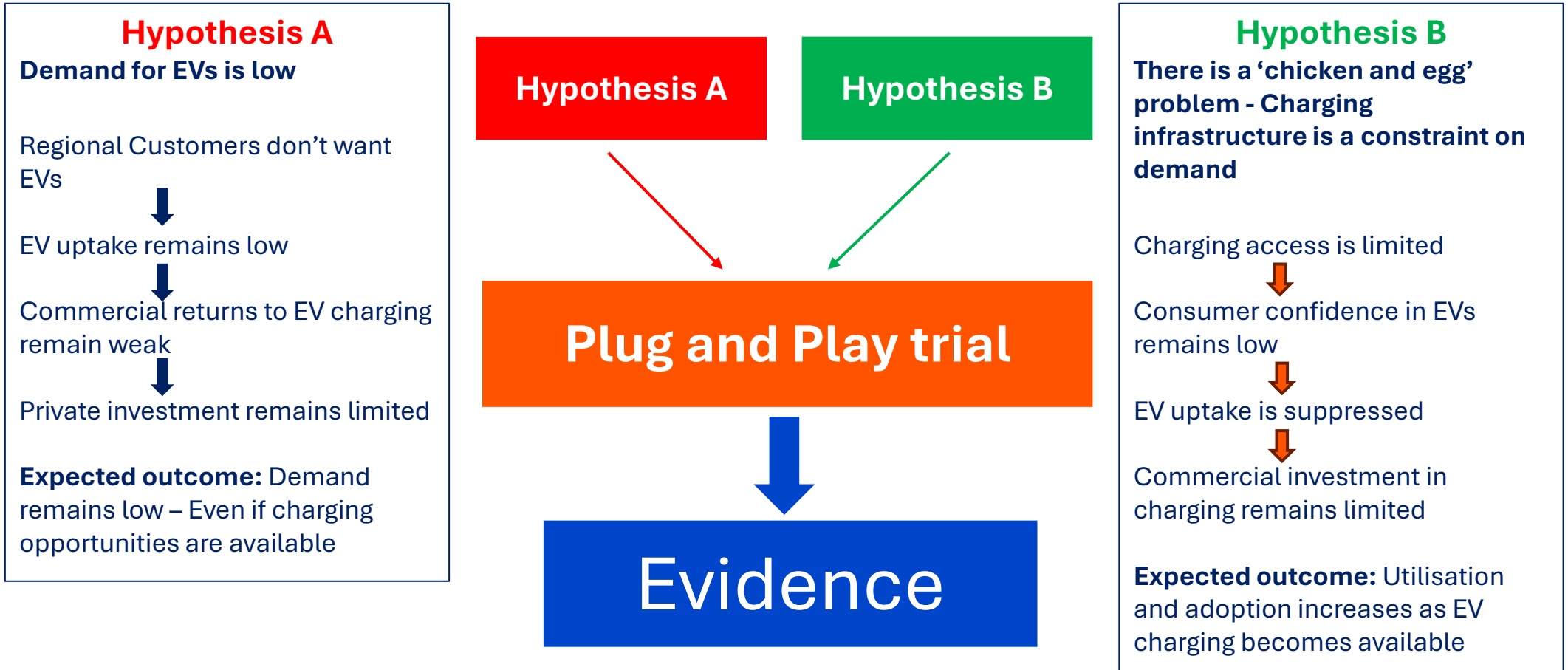
**85–90%**

Of regional communities with no  
pole-mounted charging



# What are we testing?

The trial is designed to test two competing explanations



**What happens if Hypothesis A is correct?**

- Trial demonstrates limited demand.
- Future intervention is unnecessary.

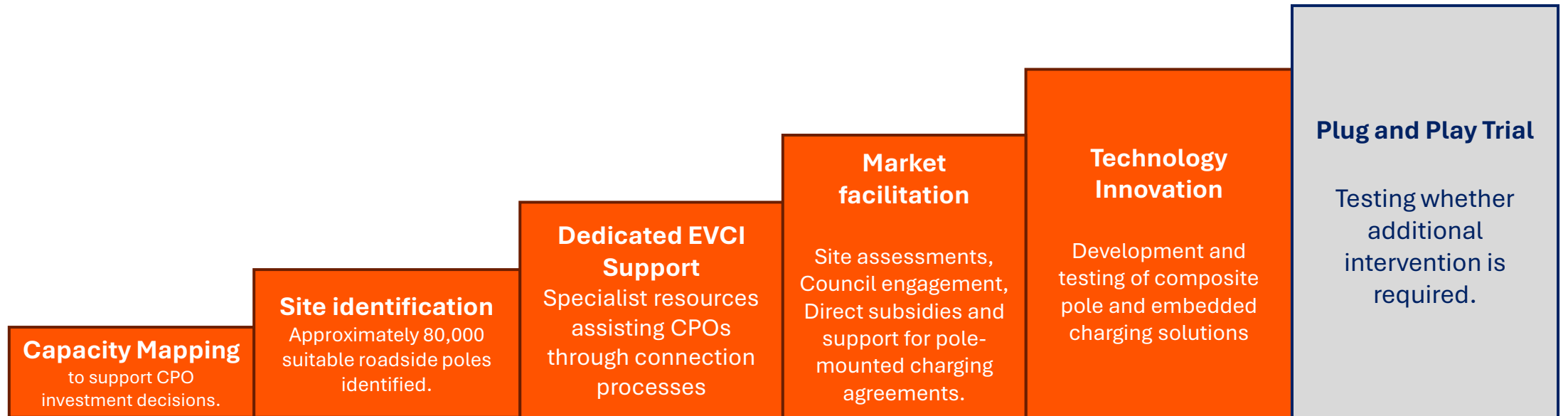
**What happens if Hypothesis B is correct?**

- Trial demonstrates infrastructure unlocks demand.
- Market barriers can be better understood



# Essential Energy has already acted within the current framework

The trial follows years of facilitation — it is not the first step



# The trial is designed as a controlled experiment

Testing whether infrastructure enablement alone is sufficient — or whether shared infrastructure is required

## Plug and Play Trial

### STREAM 1

#### Infrastructure Enablement

- 1,000 Enabled Poles

#### Question Being Tested

- If barriers are reduced, will the market deploy chargers?

Waiver Required? No



### STREAM 2

#### Shared Infrastructure

- ~300 Kerbside Chargers

#### Question Being Tested

- If infrastructure is available, does market participation increase?

Waiver Required? Yes



# Essential Energy's role is deliberately limited

Infrastructure ownership does not mean participation in charging markets

## Essential Energy

- ✓ Install infrastructure
- ✓ Own infrastructure
- ✓ Maintain infrastructure
- ✓ Fault response
- ✓ Asset replacement



## Independent Charge Point Operators

- ✓ Pricing
- ✓ Billing
- ✓ Customer engagement
- ✓ Retail charging services
- ✓ Customers remain with CPOs

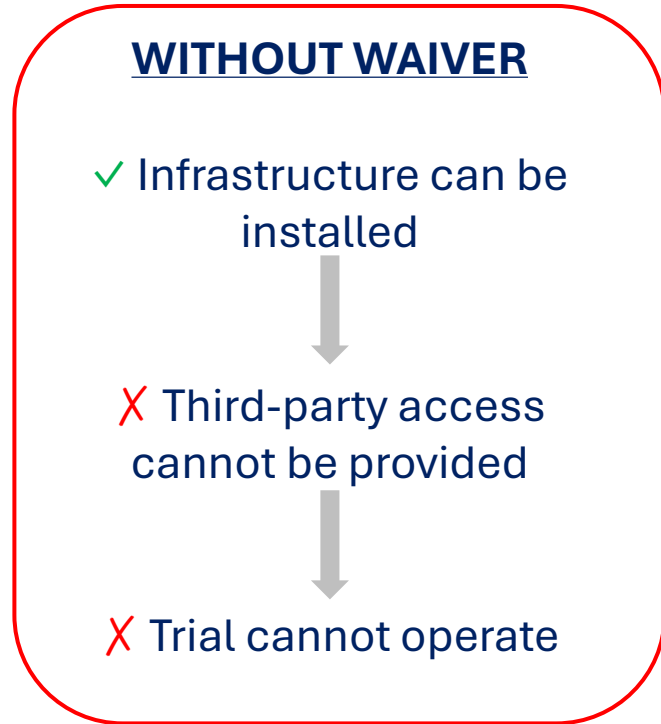
Essential Energy enables access to infrastructure

CPOs deliver charging services



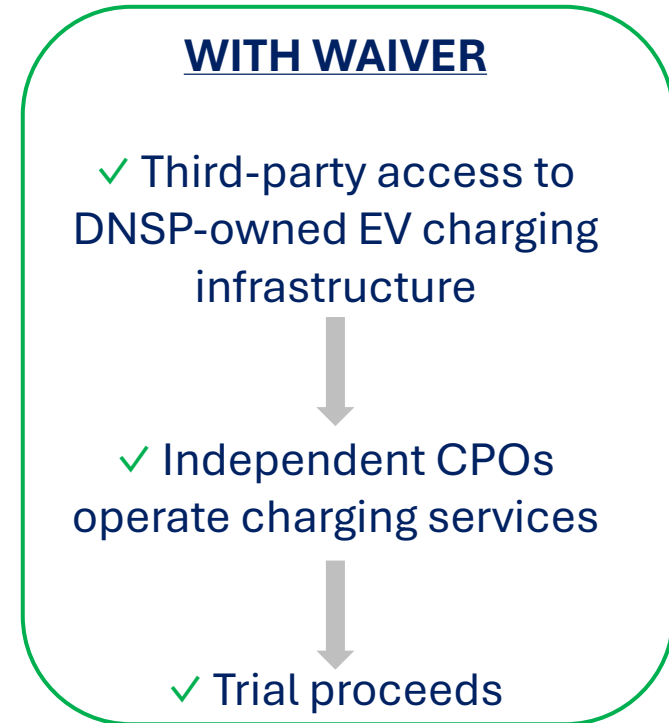
# Why is a waiver required?

**One clearly defined service: third-party access to EV charging infrastructure installed within Essential Energy's network assets**



**What happens if the waiver is not granted?**

- ✗ Stream 2 cannot proceed.
- ✗ The controlled comparison cannot be completed.
- ✗ Evidence is not generated.



**The waiver enables access to infrastructure. It does not create a new market role.**



# Strong safeguards. Clear boundaries.

## The trial has been designed to protect consumers and competition

### Competition

#### Risk

DNSP crowds out private investment

#### Safeguard

- ✓ Limited to locations where commercial deployment has not occurred
- ✓ Sites with active commercial intent excluded
- ✓ Stream 1 remains fully contestable

### Non-discrimination

#### Risk

Preferential treatment

#### Safeguard

- ✓ Open competitive processes
- ✓ Transparent selection criteria
- ✓ Equal access arrangements

### Cross-subsidisation

#### Risk

Customers pay for the trial

#### Safeguard

- ✓ No regulated funding
- ✓ No network cost recovery
- ✓ ARENA + shareholder funding only
- ✓ No RAB inclusion

### Regulatory Integrity

#### Risk

Permanent DNSP role

#### Safeguard

- ✓ Time-bound
- ✓ Reversible
- ✓ Evidence focused
- ✓ Future decisions remain with regulators
- ✓ **Knowledge sharing**
  - ✓ Public reporting
  - ✓ Operational data sharing
  - ✓ Industry dissemination
- ✓ Independent ARENA oversight

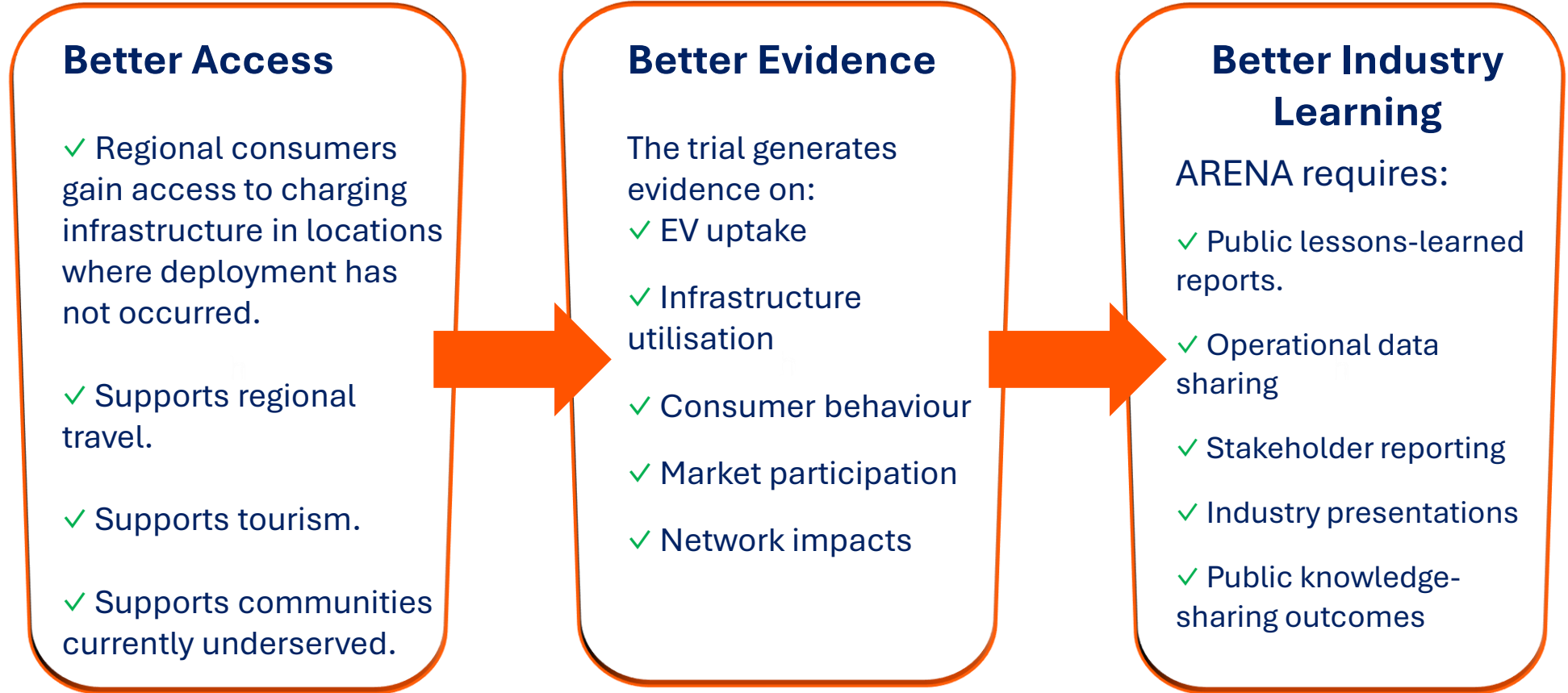
## The trial is designed to enable competition — not replace it

The safeguards are not additional features of the trial. They are fundamental elements of its design.



# Why this matters for consumers and the industry

The value of the trial extends beyond the chargers themselves



The trial is designed to create value whether the hypothesis succeeds or fails



# The decision before the AER

Should regional consumers wait, or should we test the question?

## Wait

- Rely on assumptions
- Continue debating causes
- Regional charging gaps remain
- Market outcomes remain uncertain
- Evidence remains limited



## Test

- Generate real-world evidence
- Observe consumer behaviour
- Observe market participation
- Inform future regulatory decisions
- Support evidence-based policy

**The trial does not ask the AER to choose a winner.  
It asks the AER to allow the evidence to emerge.**





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Job title

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# Q&A



# Closing remarks and next steps

- Jarrod Ball, Board member AER – reflections
- Submissions close **Tuesday 14 July 2026**

## AER contact

- Laura Considine – Director, Ring-fencing team
- Email: [AERringfencing@aer.gov.au](mailto:AERringfencing@aer.gov.au)