

Electric Vehicle Charging Infrastructure (EVCI) Trial

Market Testing Report for eMSP Engagement

21 July 2026



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Executive Summary

Our trial adopted an innovative operating model to deliver the most value to users. This involves CitiPower, Powercor and United Energy (CPU) owning, installing and maintaining pole-mounted chargers while e-Mobility Service Providers (eMSPs manage customer relationships and billing).

We conducted market engagement through multiple channels. This included direct outreach with known eMSPs operating in the Australian EV charging market, ensuring established providers were made aware of the opportunity. This targeted engagement was complemented by public Expressions of Interest (EOIs) advertised on LinkedIn in May 2025 and again in November 2025 to maximise visibility and encourage participation from a broader range of market participants. The use of both targeted and open-market engagement channels helped ensure that the process was transparent, inclusive and accessible to both established and emerging providers.

The market testing process generated 11 responses from interested parties. After initial reviews of capability and alignment with trial objectives, eight respondents progressed.

These engagements provided valuable insight into current market offerings, delivery models, technical capabilities, customer support arrangements and the capability of providers to deliver services. The process also enabled assessment of respondents against a range of metrics. These included governance, security and compliance (including cyber security), data management practices and the ability to meet obligations associated with critical infrastructure and energy sector operations. As part of due diligence activities consideration of Foreign Investment Review Board (FIRB) requirements ensured that prospective delivery partners were assessed not only on capability, but also on their ability to satisfy the security, regulatory and risk management requirements associated with the energy industry.

The responses received demonstrated sufficient market interest and capability to deliver the trial. The process also allowed the project team to understand market maturity, identify potential delivery risks and opportunities and refine elements of the trial design to align with practical market capabilities. Importantly, the process provided confidence that eMSP selection was informed by an understanding of available market options rather than reliance on a limited number of incumbent suppliers.

The combination of targeted outreach, public EOI processes and subsequent assessment allowed CPU to demonstrate it had appropriately tested the market and considered a range of potential eMSPs before progressing with delivery arrangements.

Project background

Victoria has set ambitious decarbonisation targets. These include a commitment to achieve net zero emissions by 2050 and a long-term vision for zero-emission vehicles to become the dominant form of transport.

A key enabler of this transition is the availability of reliable, accessible and affordable charging infrastructure. While electric vehicle adoption continues to grow, charging accessibility undermines customer confidence and purchasing decisions.

Research consistently identifies charging availability, convenience and concerns regarding charging access as important factors affecting EV adoption rates. These challenges are acute for customers:

- without access to off-street parking
- in higher-density urban environments
- in regional communities where charging infrastructure may be less prevalent.

CPU recognised these challenges and developed the EVCI Trial. The project set out to explore how existing electricity distribution infrastructure could support the delivery of public charging services in a safe, efficient and scalable manner.

The trial started with a ring-fencing waiver application to the Australian Energy Regulator (AER). This was needed for the networks to own, install and maintain EV charging infrastructure with independent third-party operators providing customer-facing charging services.

The trial is intentionally limited in scope and scale. It is designed as a learning initiative rather than a commercial charging network. The objective is to gather practical insights that can assist governments, regulators, network businesses and market participants to understand how public charging infrastructure may evolve as EV adoption accelerates.

The trial focuses on several key areas:

- impact of EVCI charging on demand in local networks
- impact of customer charging on price elasticity during periods of both low and high demand
- application of new technologies on the networks
- understanding utilisation rates of local area identities (e.g.: utilisation in residential streets compared to commercial and no-off-street parking locations to inform demand forecasting)
- impact of power quality on the network from customer charging behaviour
- development of processes and technical guidelines for ECVI connections.



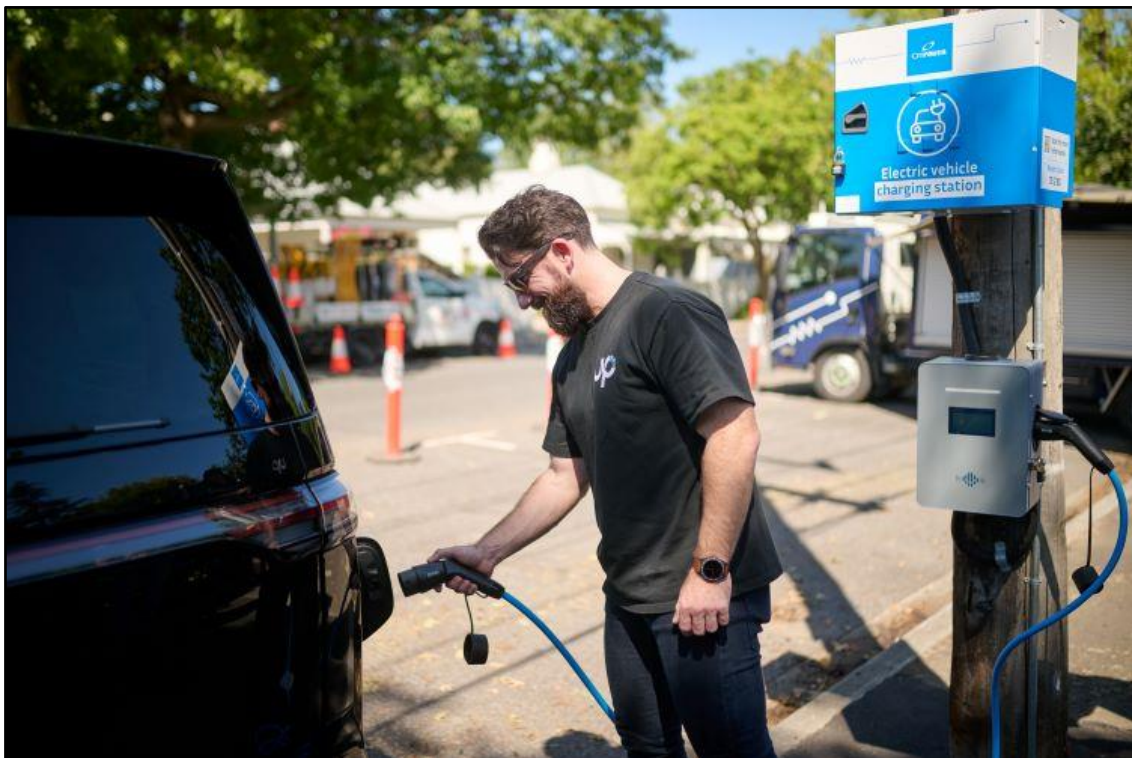
Representatives from CitiPower, Boroondara Council, participating eMSPs and other project partners at the launch of the first charger

About this report

This report has been prepared to demonstrate that CPU have undertaken reasonable efforts to ensure broad market participation in the selection of eMSP partners for the EVCI trial.

The report documents the market testing activities undertaken by CPU. This includes targeted engagement with known market participants and public expressions of interest and provides evidence that the market was tested through a transparent and competitive process. It also outlines the approach taken to engage potential providers and the level of market participation achieved.

The report provides transparency to stakeholders that CPU has considered a range of capable providers and undertaken an open and robust process to support the delivery of the trial.



zuup founder James Kleine plugging in for the inaugural charge at our Boroondara launch

E-Mobility Service Providers

1. Market Engagement

Direct Market Outreach

Initial market engagement involved direct outreach to known eMSPs operating within the Australian EV charging sector. CPU leveraged its existing knowledge of the market and industry networks to identify parties with demonstrated experience in EV charger operation and customer service delivery.

Targeted emails were issued to five potential providers outlining the objectives of the EVCI Trial, the anticipated scope of services and the opportunity to participate. This approach ensured that established market participants with relevant experience were made aware of the opportunity and had a clear pathway to engage with CPU.

The direct engagement process generated strong market interest and informed CPU's understanding of current market offerings, emerging business models and the capability of providers to support the objectives of the trial.

LinkedIn Expression of Interest – May 2025

Prior to the AER approving the trial waiver, CPU undertook an initial market-sounding exercise to better understand the capability and maturity of the eMSP market and to inform the development of the trial. As part of this process, CPU published an EOI on LinkedIn in May 2025 to gauge market interest and identify potential providers capable of supporting the proposed trial.

The EOI provided information on the proposed trial objectives and invited interested parties to register their interest. This early engagement activity enabled CPU to test the market before finalisation of the trial framework, better understand available delivery models and assess the level of interest from prospective participants.

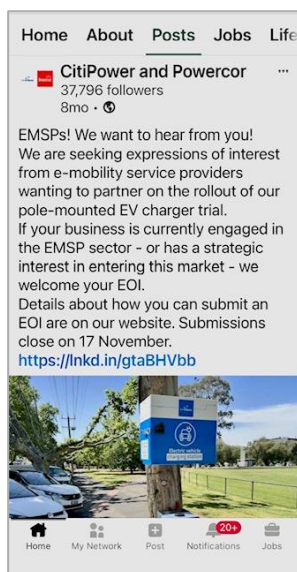
LinkedIn Expression of Interest – November 2025

To complement the targeted outreach process and maximise market visibility, a second LinkedIn EOI was published in November 2025 to further test the market and ensure that all interested providers

had an opportunity to participate. This additional engagement activity reflected CPU's commitment to maintaining an open and transparent process and recognised the rapidly evolving nature of the EV charging market.

The use of a public EOI ensured that participation opportunities were not limited to organisations already known to CPU and enabled emerging providers, new market entrants or those who expanded their capabilities during the intervening period, as well as companies outside CPU's existing networks, to become aware of the trial.

The LinkedIn platform was selected due to its broad reach across the energy, EV charging and technology sectors and its ability to encourage engagement from a diverse range of potential suppliers.



LinkedIn post - November 2025

2. Market Participation

CPU's market engagement generated responses from **11 organisations**. This level of participation demonstrated strong market interest in the EVCI Trial and provided CPU with a broad range of potential delivery partners.

An initial assessment was undertaken to evaluate respondents against the trial's core requirements. These included technical capability, operational experience, customer support arrangements, cyber security and data management practices and broader governance and compliance considerations. As part of this assessment, CPU also considered each organisation's ability to meet the regulatory and security requirements associated with operating infrastructure connected to critical electricity assets. This included consideration of ownership structures and FIRB requirements (where applicable).

Of the 11 organisations that responded, two were assessed as not meeting the technical requirements of the trial and did not progress further in the process. A further two organisations elected not to proceed beyond its initial expression of interest. The remaining seven organisations progressed to more detailed capability and due diligence discussions with CPU.

Onboarding activities have continued, with three eMSPs now fully onboarded and operational within the trial. An additional two eMSPs are undertaking integration testing, with onboarding activities focused on validating technical interfaces and operational readiness. The remaining two eMSPs have participated in engagement activities but have not yet committed to integration and may ultimately choose not to proceed with participation.

Expanding the number of participating eMSPs is increasing customer choice and promoting competitive charging and service offerings, ultimately helping to deliver greater value and lowering charging costs for customers.