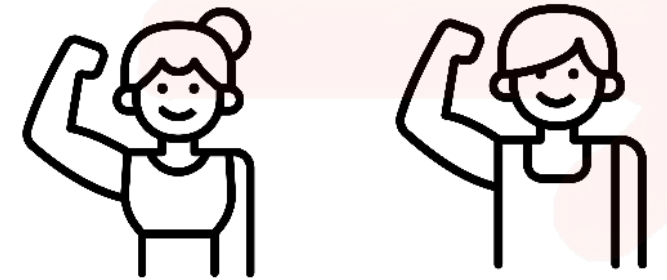


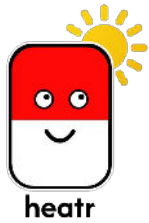
FlexForum Member Meeting

14 April 2026





= Basis



individuals

Agenda: 14 April 2026

1. Welcome
2. A quick overview of flex activity: Commerce Commission, Future Networks Forum, Ara Ake, EECA, Electricity Authority and FlexForum
3. Your flexibility activities: What are they? How can FF or its Members help? (poll)
4. Upcoming FlexForum activities which need your support and input
5. Final words

1 Welcome

Purpose of this item:

- Welcome
- Reminders

The purpose of the FlexForum is to **support coordinated and collaborative action** to make it easier for households, businesses and communities to maximise the value of consumer and distributed energy resources and flexibility to:

- support affordable and reliable operation of the electricity market and power system
- enable accelerated electrification by households and businesses as part of the transition in Aotearoa New Zealand to zero emissions economy

You should all be familiar with the requirements of the Commerce Act 1986, prohibiting anti-competitive conduct. You should not discuss commercially sensitive areas of competitive activity, including (but not limited to) relating to agreements to fix, control or maintain prices, restrict output or capacity, or allocate markets or customers

A written record of the discussions today will be available.

2 A quick overview of flexibility activity

A quick overview of flex activity from:

1. Commerce Commission
2. Future Networks Forum
3. Ara Ake
4. Electricity Authority
5. EECA
6. FlexForum

FlexForum has 4 core activities

1. Flexibility Plan progress assessment
2. Deep dives to provide a FF view ('vision') on foundational issues/topics
3. Knowledge sharing
4. Support for learning-by-doing

Flexibility plan progress assessment. This is a must-do task required by the FF constitution. The 2026 focus is assessing and reporting progress. ...the (3rd) progress report will be ready early July ahead of the 2026 AGM on 31 July.

- A desk top scan of practical activity relevant to each step is intended during April/May. Members will be asked to review offline and via several small workshops in May/June. These workshops will be used to get Members to rate progress and priorities.
- Quantitative measures will be included to the extent possible...

Deep dives. These provide the foundation for FF advice about priorities/dead-ends etc for learning-by-doing and regulatory action for critical topics/issues by filling obvious gaps in understanding of the problems/opportunities. FF Members have decided that the two most pressing gaps are Digitalisation and Pricing/orchestration.

Deep dive into the 'digitalisation and data' snake pit. Write up of a FF Insights is 50-ish% complete.

- The FF Insights draws on Member input and extensive thinking/experience captured in the [UK digitalisation plan](#) etc.

Deep dive on pricing and orchestration mechanisms is slowly getting underway. The context and scope reflects FF Member discussions over the past years and feedback you provided earlier this year

- A kickoff workshop will be scheduled for late April (touchwood) focusing on the customer proposition and the factors determining how (and when etc) retailers construct flexibility propositions. The sequence of subsequent sessions will be developed in preparing for that workshop
- We are working with ERGANZ to explore flexible customer propositions (focusing on those reducing the energy burden). The task involves an international scan which will provide the basis for a FF discussion on how practically implement flex propositions to reduce the energy burden in Aotearoa New Zealand.

FlexForum activities (2)

Knowledge sharing. Information and updates on flex-y activity are not regularly shared, scattered across many websites and provide varying levels of detail. Members have asked for more current information on who is doing what.

- content for about 7 flex project updates is being collected.
 - Update on Building a future-proof Queenstown through flexibility collating Queenstown electrification accelerator and Energising Queenstown projects.
 - Update on Mangawhai Hills a community first energy system
 - Scaled DF pilot projects - content is being collected.
- monthly lunchtime sessions are underway... next up: 6 May... Clive Pinfold and the Heatr team will share their activity [note clash with BEC event]
- Flex Day 2026... initial thinking on time, place and theme = September or October in Wellington or Auckland focusing on practical experience.

Support for learning-by-doing. FF is uniquely placed to enhance collaboration/synergies by joining dots between the diverse range of actors undertaking learning-by-doing. Tasks include:

- the EECA scaled DF pilots, Transpower WBOP flex programme, and Local Flex all are exploring questions noted in the pricing and orchestration deep dive. The series of structured workshops for the deep dive will collate the questions, and the findings will provide boundaries for the project assessment.
- supporting research coordination/collaboration to achieve: a standard research data set; more data sharing (for related/follow on research); greater sharing of research expertise; and minimising research duplication (and research gaps).

Your flexibility activities...

Poll question: What flexibility-related activities have you underway or planned?

Poll question: How could FF or its Members help?

FlexForum activities which need your support and input

The FlexForum unique selling point is YOU, your experience and practical insights, and is why decision makers pay attention.

Your input and support is needed over the coming months...

- Attend workshops
- Share your flex activity. Whatever the stage or status. Your experience will help your flex friends
- Share your perspective on questions via email, phone

Flex Plan progress report	Deep dives	Knowledge sharing	Support for learning-by-doing
Input to a desktop survey of flex activity which achieves FP2.0 steps (April/May)	Review the FF Insights on Digitalisation in late April	Provide updates on your flex projects	Workshops from late April (touchwood) working through pricing and orchestration questions
Workshops in May to rate flex progress and priorities	Workshops from late April (touchwood) working through pricing and orchestration questions	Contribute content for the Knowledge Hub	Provide updates on your flex projects
Review the (draft) 2026 progress report		Identify candidates for webinars on critical flex issues/topics	

5 Final words

Flexforum update

April 2026



Commission Open Letter

August 2025;
Open Letter: Ensuring our approach to price paths is delivering for consumers

Purpose of this open letter The purpose of this open letter to stakeholders is to obtain views on:

- the recent reset of the electricity distribution default price-quality paths (DPPs) which applies to non-exempt electricity distributors (EDBs) from 1 April 2025 (DPP4)¹
- mechanisms, incentives or settings which could be applied in DPP5 (the reset which will apply to EDBs from 1 April 2030), and the process and information for that reset

Potential areas for focus for DPP5

The energy sector is in a period of change and uncertainty, and the pace of change may accelerate over the period leading to DPP5. Where and when investment may be required will depend on a number of policy, consumer demand and market evolutions. At the same time as electricity demand is expected to increase, there are new technologies and alternative solutions for accommodating growth on electricity networks. The expectations of consumers, government and industry on both us and the sector are also increasing. Considered engagement from the energy sector is therefore critically important to ensuring the price-quality paths we set for DPP5 continue to provide the right incentives for EDBs.

The default price-quality path reset and IM review present opportunities to review and adjust our price-quality path regulation to ensure it remains fit for purpose in the changing context faced by the energy sector. This could include whether current settings, including information requirements:

- best promote the efficient use of EDBs' networks and existing capacity, including greater use of non-traditional solutions and managing or incentivising load shifting
- encourage innovative approaches to delivering least-cost energy services
- encourage improvements in asset management practices, planning, and service delivery outcomes for consumers
- create the right framework for addressing uncertainty about future demands on networks – e.g. through revised information to support expenditure forecasting at the start of the process and/or adjustment mechanisms which could apply within the regulatory period

Given the time required to engage effectively with stakeholders, develop datasets, and design incentives or frameworks which EDBs can respond to, we are seeking your views on areas of focus for DPP5. We intend to take account of feedback provided on this letter in developing our work programme through to the next reset, but will need to prioritise those aspects we consider will deliver the most value for consumers.

Regulators Joint Letter

- Through our respective roles, we seek to ensure distribution investment decisions are efficient, forward-looking, responsive to changing system needs and deliver reliable, least-cost electricity at for consumers. We also recognise the role we play in aligning regulation across government to minimise regulatory burden and simplify processes for market participants, to enable the opportunity outlined in this letter.

INTSA applications

- OurEnergy Local Flex – [Flexibility Market place platform](#). Powerco, Unison and Vector have all applied and been approved for funding related to this project. Horizon have just recently applied to join as well (hopefully published before Flexforum).

[Resiflex stage 3b](#) – Orion have been approved for funding

[Commercial and industrial demand flex](#) – Orion have been approved for funding

- **New and unpublished**
- [Flexible Farm energy](#) – Powerco (not yet assessed). The Flexible Farm Energy project will investigate how both farmers and service providers may react to increasing consumer energy resources (CERs) and a changing rural energy landscape. Through that understanding, the project will develop and test optimal future network and non-network energy solutions for farmers or farming communities, and the role that service providers may play in these solutions.
- LV Network lab – Vector (not yet assessed) arrived on the 13 April

GXP investment review

Location	Initiative	\$	When
Penrose	New interconnecting Trx	TBC	2028
Rosedale GXP	New GXP	\$60m	2033
Henderson supply capacity	Install 3rd Trx	TBC	2025
Mangere supply capacity	Install 3rd Trx	TBC	2025
Southdown GXP	New GXP	TBC	2029
Takanini supply capacity	New 220kv bus and 3rd Trx	\$39m	2027
Wiri supply capacity	Install 110kv bus and 3rd Trx	\$18.4m	2030
Valley spur transmission capacity	New 110kv circuit	\$72	2028
Tauriko	New GXP	\$26.4	TBC
Takapu road	Instal 3rd Trx	\$10	TBC
Kaiwharawhara	Install higher rated Trx	TBC	2028
Central Park	New substation	\$27m	TBC
Stoke 33kv	New GXP	\$41.9m	2025
Bromley	Install 3rd Trx	\$12m	2028
Waimakariri	New GXP(under investigation)	TBC	TBC
Bells pond	New GXP	TBC	TBC
Oamaru supply	New GXP	TBC	TBC
Temuka	New GXP	TBC	2023
Timaru GXP	Upgrade and install two Trx	TBC	2027
Frankton supply upgrade	Thermal upgrade	\$9.6m	2027
Cromwell	New GXP	TBC	TBC
Arrow junction GXP	New GXP	\$35m	TBC
Cromwell - Queenstown	New transmission line	\$100m	TBC
Edendale	New GXP	\$35m	2025
Invercargill GXP	New GXP	\$35m	2030

List from Transpower 2025
Transmission planning report

ENA Future Networks Forum

Update to FlexForum

FNF Co-chairs: James Tipping (Vector)

14 April 2026

Future Network Forum (FNF)

The purpose of the FNF is to harness the collective power of the distribution sector to help Aotearoa reach its climate change goals.

- reps from across 25 lines companies
- we encourage new members to join so we can form a comprehensive view of opinions from across all our lines companies
- it identifies opportunities where EDBs can align to help us reach our climate change goals and create value for customers



Future Networks Forum: leading the future of networks

Hei ārahi i te anamata o ngā whatunga

PURPOSE

We come together to **harness the collective power of EDBs** to help **Aotearoa New Zealand reach its climate goals**, by:

- **exploring the future** and **aligning expectations**
- providing a **forum for collaborating** with our EDB colleagues and our stakeholders
- bringing the **Network Transformation Roadmap** to life through **collaboration** towards its objectives
- strengthening the **mana** and **influence** of EDBs and the ENA.

AMBITION

Success for us will mean:

- EDBs have **shared expectations** of potential future scenarios, and our role in enabling the transition
- EDBs understand and are enabling our **consumers' and stakeholders' ambitions**
- EDBs are **collectively evolving through collaboration**, with priorities being delivered efficiently and **at pace**
- a **high degree of confidence in EDBs** enabling an **affordable, equitable** transition to a **reliable, decarbonised** energy system.

FOCUS AREAS



Outreach with purpose



Exploring strategic context



Delivering aligned solutions

OPERATING MODEL



Communities of practice



Collaborative initiatives



Innovation forums

FNF steering group

FNF steering group



James Tipping
Vector



Andrew Kerr
Alpine



Rachel Wansbone
Northpower



Moonis Vegdani
Counties Energy



Ryno Vester
Powerco



Craig Conlan
Network Waitaki



Jason Larkin
Unison



Lingsong Zheng
WEL Networks

With support from
Electricity
Networks
Aotearoa






Richard Le Gros
ENA



Sophie Tulley
ENA

Our mahi

What's been done

FOCUS AREAS		Outreach with purpose
		Exploring strategic context
		Delivering aligned solutions

Connections journey mapping & quick wins



- First set of quick wins are complete
- Next: queue policy, capacity maps, contract templates

Customer segmentation



- First phase complete
- Standardised approach to segmentation for any EDB

Common Load Management Protocol



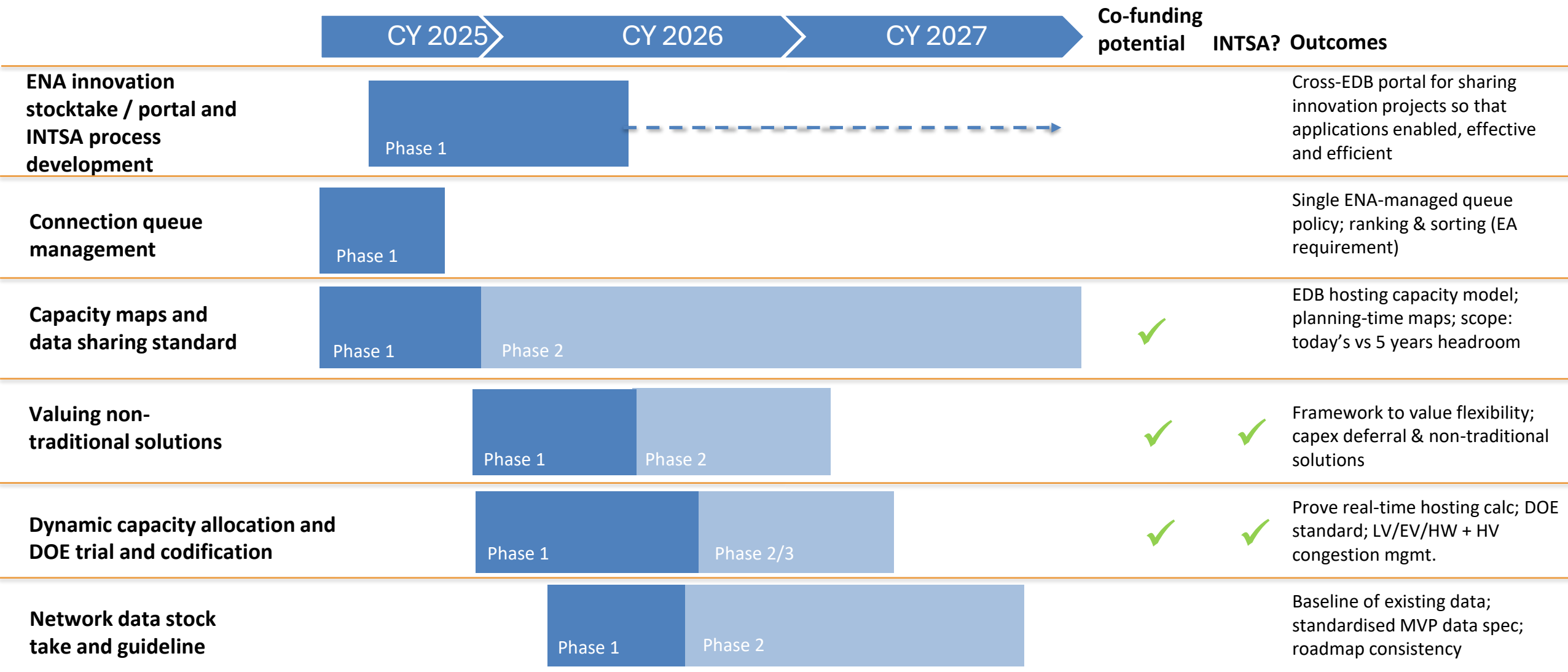
- Consultation with traders complete; LMP issued.
- A model for ongoing ENA/FNF governance of standardised industry agreements

Roles, functions and industry architecture to enable distributed flexibility



- EA consultation concluded.
- FNF project very useful reference point for the industry

What we're working on now and ahead



* Existing projects will transition in to BAU. May be some FNF role/funding

Ara Ake Flex Update for FlexForum Members

Briony Bennett

14 April 2026

Ara
Ake

Future
Energy
Development



New Zealand's national energy innovation centre

We exist to **accelerate the demonstration, commercialisation, and deployment of energy innovations** that support Aotearoa New Zealand's transition to a more sustainable, resilient and equitable energy system.

Flex portfolio overview



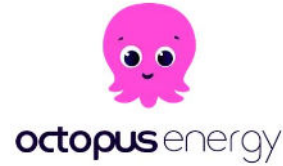
<u>FlexForum</u>	Ara Ake has been a champion and supporter of the work of industry-led Flex Forum since its inception in 2022. Ara Ake provided seed funding to help the forum develop its Flexibility Plan, incorporate and write a constitution, grow its membership, shape collaborative initiatives and provide advice on regulatory changes.
<u>Barriers to flexibility uptake from the innovators' perspective</u>	In 2024, Ara Ake commissioned a white paper which has identified that many FSPs face significant upfront challenges and costs—such as integration, software development, and consumer engagement.
<u>Flexibility Baseline Research</u>	In 2025, Ara Ake commissioned a report from the University of Otago to understand which flexibility baselining methods are being used locally and globally. This research kickstarts the conversation about how FSPs can prove deliverability and be rewarded for their services.
<u>EDB Challenge</u>	Ara Ake ran a challenge event in 2022 for electricity distribution businesses to enhance visibility, coordination and measurement of activity, including consumer-owned energy resources, on the low voltage network.
<u>Queenstown Flexibility Challenge</u>	Ara Ake partnered with regional leaders in the Queenstown-Lakes District in 2024. The region is experiencing rapid economic growth driving the need for significant investments to transmission and distribution infrastructure upgrades. Flexibility solutions have the potential to save or defer millions of dollars' worth of grid investments to meet regional demand growth.
<u>Queenstown Electrification Accelerator</u>	The Queenstown Electrification Accelerator was founded in 2025 with support from Ara Ake and other parties as a community-led electrification pilot project. Its goals are to achieve lower bills, lower emissions, and higher resilience with rapid electrification throughout Queenstown-Lakes District and beyond.



National Flex Discovery Fund 2025

Round 1 results

- 160% oversubscribed
- 20 applicants
- 12 successful recipients
- \$600,000 awarded
- 9 new connections to Gridex, Flexviz, Flexpoint, Localflex platforms (Track 1)
- 5 projects awarded funds under Track 2 across diverse technologies: hot water controls, home energy management systems, remote, smart and fast EV charging, and commercial and industrial load



National Flex Discovery Fund recipients 2025

National Flex Discovery Fund 2026

Round two - \$500,000 available

- Ara Ake will seek to award as many applicants as possible for the greatest value-for-money.
- Funding is competitive and rewarded on the merits of your application.
- All applications must be from New Zealand-based businesses. Applicants may only apply for one Track.
- **Flexibility service provider** is a business that can aggregate and remotely manage (shape or shift) electrical load or distributed generation in response to signals (such as prices).
- **Flexibility service providers** are eligible for all Tracks. Third parties, such as software providers that have a tangible role in flex, are also eligible for Track 3.

National Flex Discovery Fund 2026

Track 1: Platform on-boarding support

Purpose

Support FSPs in becoming visible and discoverable to market participants on open-access flexibility platforms.

Platforms

- Flexviz
- FlexPoint™
- LocalFlex
- GrideX

Max \$10,000 per applicant

Track 2: Develop availability of flexibility resources

Purpose

Support FSPs present on an open-access flexibility platform to scale or enhance the capacity or reliability of their flexibility resources.

Max \$100,000 per applicant

National Flex Discovery Fund 2026

Track 3 (new): Digitalisation support

Purpose

This track offers software development support to New Zealand based businesses engaged in flexibility services that are helping to grow Aotearoa's flexibility market, connect DER assets with buyers, and support digital energy systems that enable flexibility trading.

What we are looking for

Max \$50,000 per applicant

Ara Ake will be looking for projects with a strong focus on benefits to New Zealand and the energy system as a whole.

It will not support software solutions that inhibit customer choice or lock them into one system. It is seeking future-proofed

Research paper

Aotearoa New Zealand's flexibility market: state-of-play

- Ara Ake has authored a research paper on the state-of-play in the flexibility market.
- This paper is written for innovators, industry and regulators that have a role to play in the evolving flexibility market.
- It describes the current 'state-of-play' in the flexibility market and how new flexibility platform offerings work, as well as opportunities and challenges for the near future.
- It's intended as additional context and information for Fund applicants.

Available on the Ara Ake website:

[Aotearoa New Zealand's flexibility market: state-of-play \(2026\)](#)



Figure 2: New Zealand electricity market set up (simplified) that shows new players: prosumers with CER and flex service providers alongside existing market mechanisms. Throughout this paper, this diagram is built on to show the evolving mechanisms for trading flexibility.

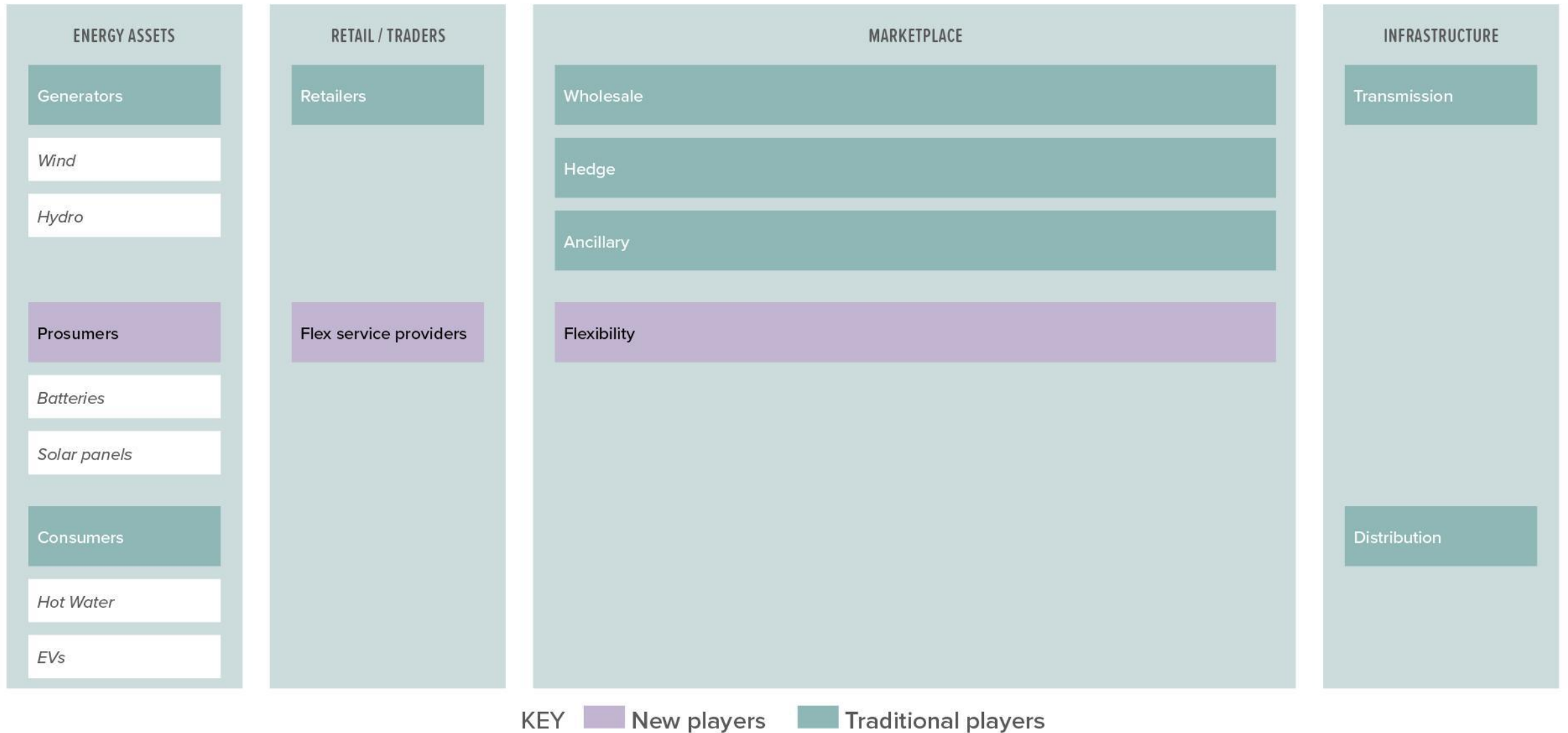


Figure 4: Current flexibility platforms in Aotearoa including existing and in-progress integrations



KEY Integration underway — Existing integration

Figure 5: Flexibility platforms' existing versus potential functions. This diagram blends commercial and operational layers.

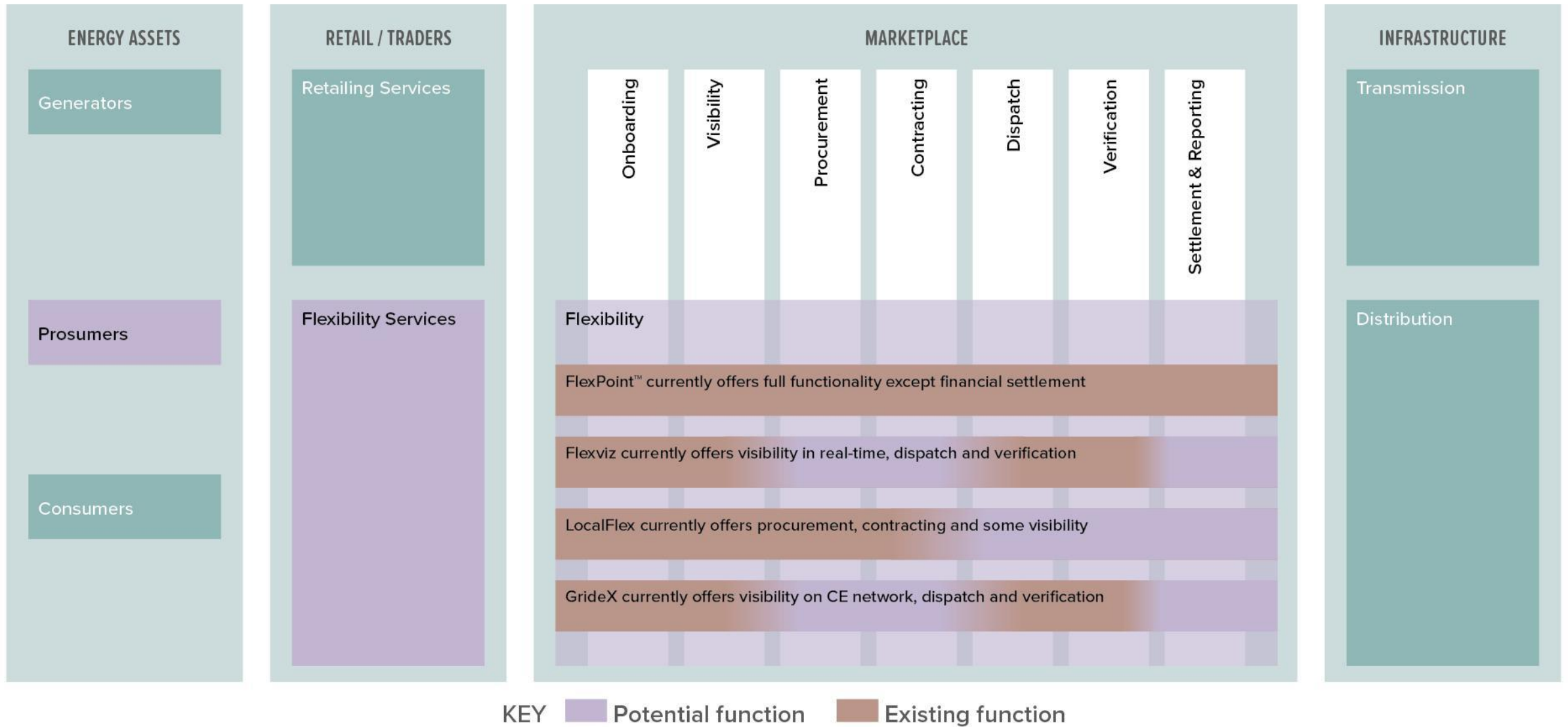
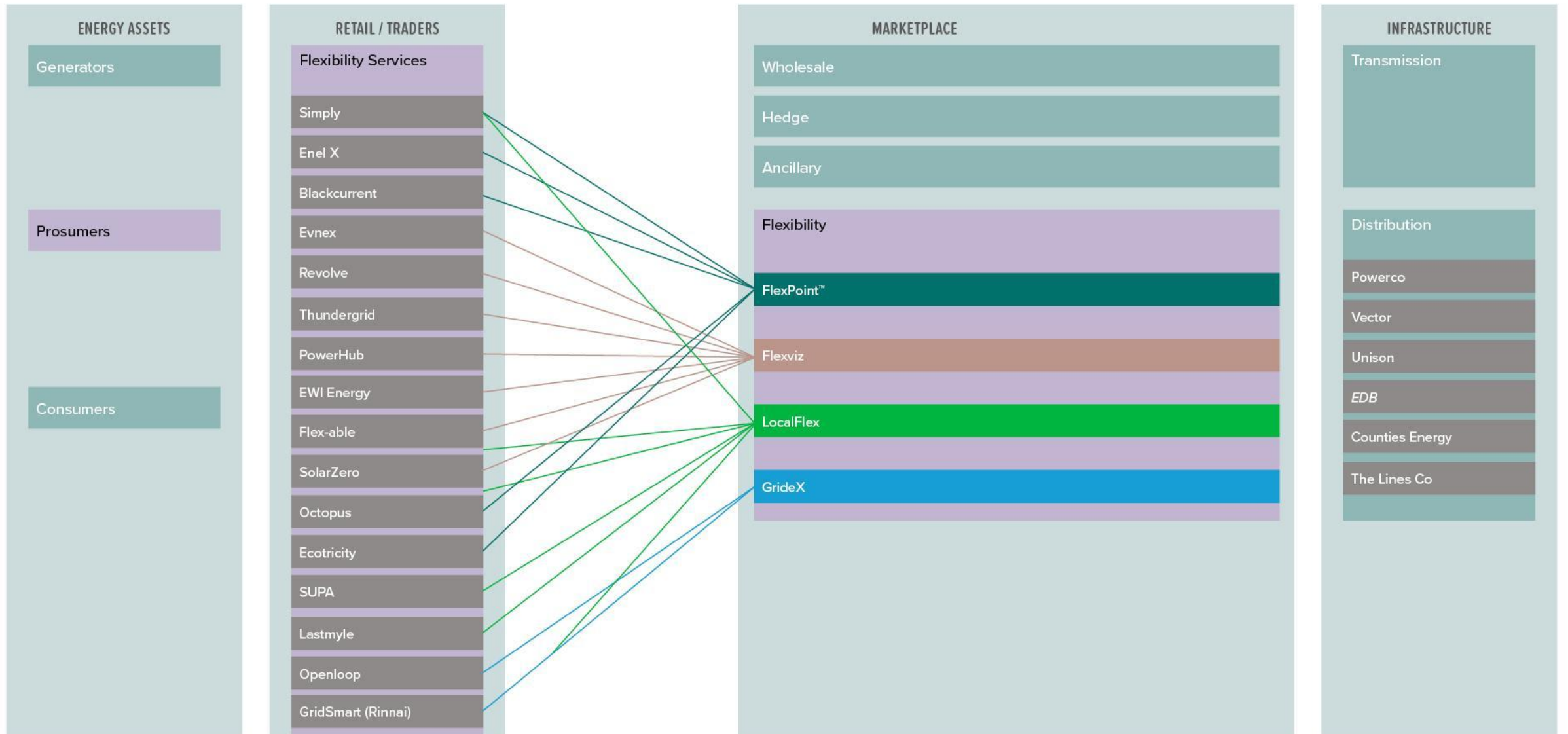


Figure 6: Flexibility ecosystem and platform connections emerging from National Flex Discovery Fund 2025. This is non-exhaustive and not all FSPs above were Flex Fund recipients.



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www.araake.co.nz



Ara
AKE

Future
Energy
Development

14 APRIL 2026

FLEXIBILITY REQUIREMENTS UPDATE

ĒĒCA ENERGY EFFICIENCY &
CONSERVATION AUTHORITY
TE TARI TIAKI PŪNGAO



WE LEAD ON ENERGY USE

EECA's levers



Regulation

Of products, processes, and systems.



Information and motivation

To promote clean and clever energy choices.

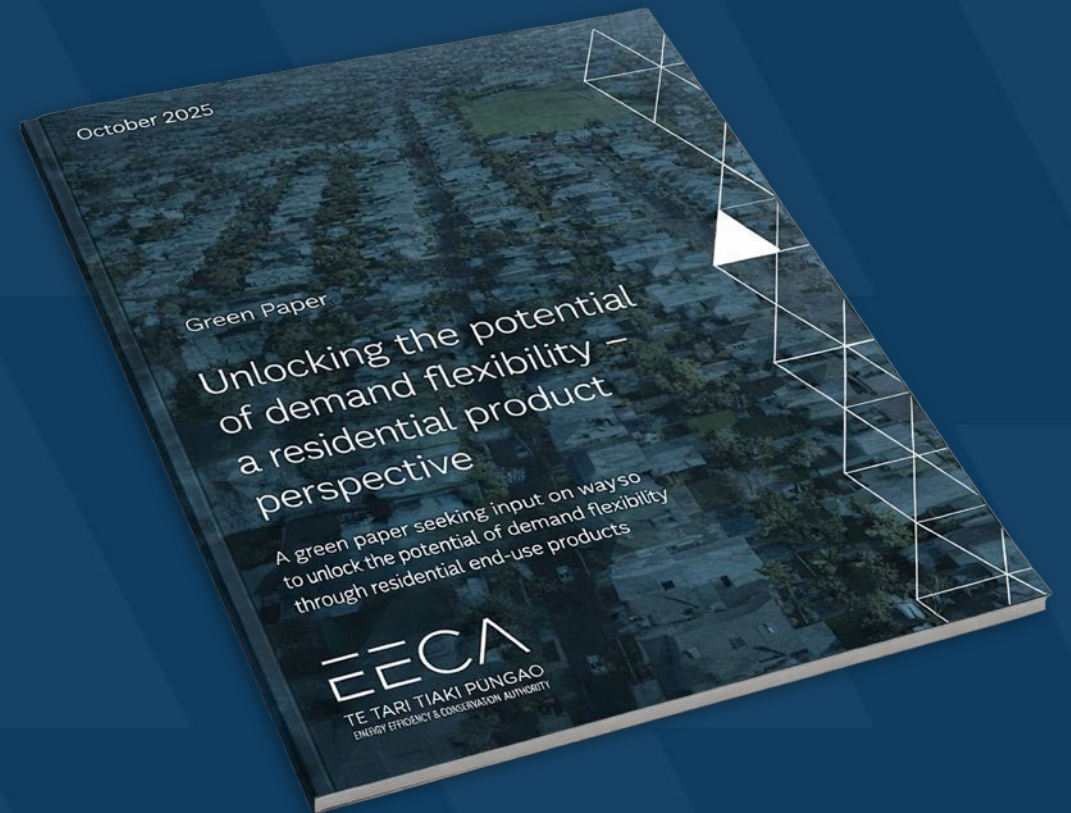


Targeted investment and support

To demonstrate and scale up energy efficient technologies and renewable energy use.

Lever 1 – Regulation

- Green Paper on appliances + demand flexibility
- Smart EV charger rules (finalising post-consultation)
- Industry/regulator working groups on smart tech standards
- Proposed changes to the EEC Act



Lever 1 – Cross Agency Collaboration

- Joint letter – EECA, EA and ComCom
- FSO Roadmap (EECA / EA / ComCom / MBIE)



24 February 2026

Tēnā koutou,

Ensuring consumers benefit from efficient investment in non-network solutions

Consumers will benefit significantly from the use of non-network solutions in delivering the capacity needed for the energy transition and for economic growth. This is a joint letter from the Commerce Commission, the Electricity Authority and the Energy Efficiency and Conservation Authority focused on accelerating the use of non-network solutions in electricity distribution networks.

Purpose of this letter

This letter sets out our understanding of the opportunity that non-network solutions offer to improve the efficiency of electricity distributors (distributors). It also sets out some of the key actions we consider distributors should be taking now and in the future to leverage non-network solutions effectively and efficiently.¹

We are seeking feedback on the contents of this letter from all stakeholders with an interest or involvement in this area. This includes consumer groups, distributors, flex providers, generators, retailers and Transpower.

Your feedback will help inform future thinking on priorities, work programmes, and new/amended regulatory requirements. These include Electricity Authority Te Mana Hiko (Authority) work on network pricing and policy, the Energy Efficiency & Conservation Authority Te Tari Tiaki Pūngao (EECA) work supporting non-network solutions and the Commerce Commission Te Komihana Tauhokohoko (Commission) preparation for the next default price path (DPP5), ongoing work on information disclosure requirements and assessment of reopener applications.

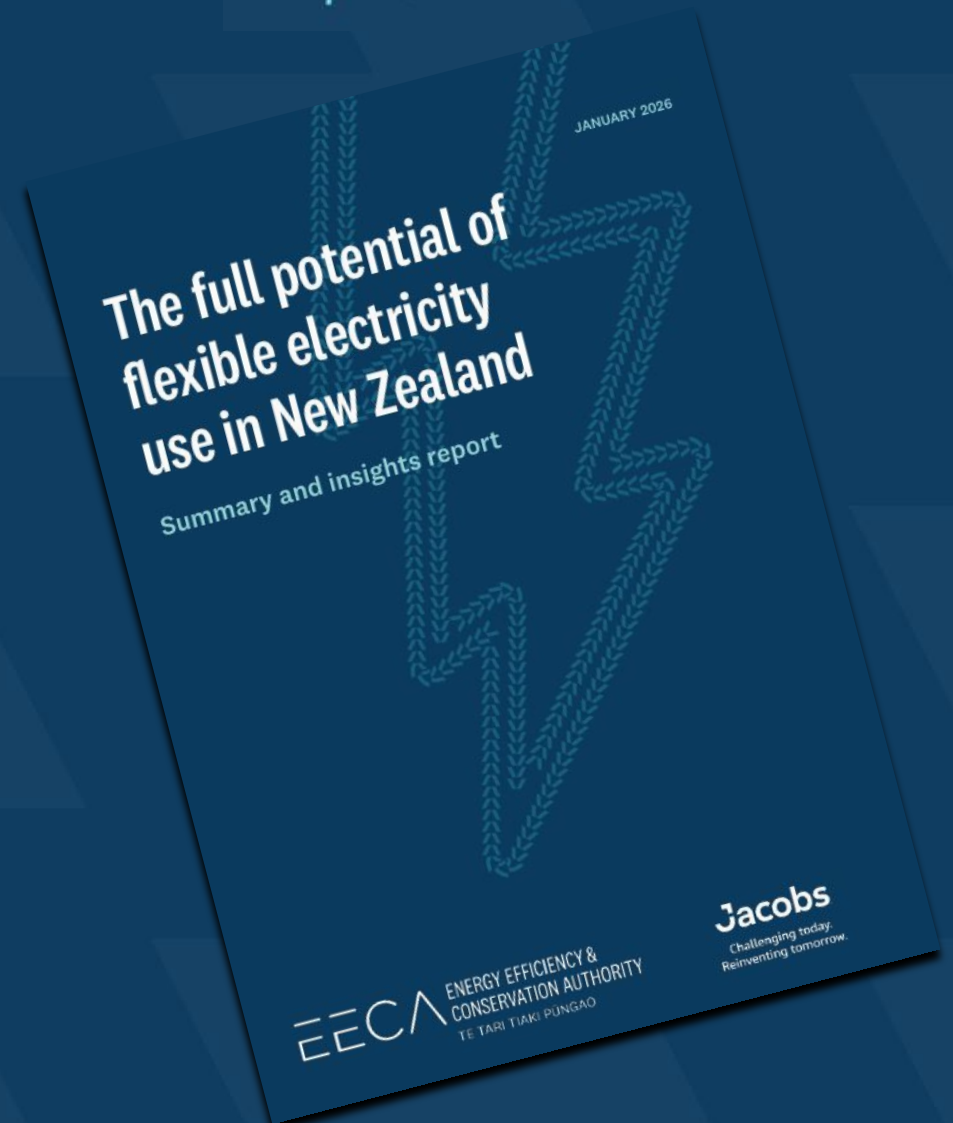
Lever 2 – Information and Motivation



Tools & Comms: Expanded website
focus on DF + smart tech

Research:

Jacobs – flexibility potential in NZ
Verian – consumer awareness &
perceptions



Lever 3 – Targeted investment and support



Pilots:

Queenstown V2G
6 x scaled DF pilots
FlexTalk 2.0

RFPs / RFIs:

DF initiative (BESS + services)
Heavy vehicle charging
AI for demand-side efficiency



How can you support us?

- Help amplify EECA tools and messaging
- Align network, retail + market incentives
- Ensure value + protection for consumers
- Make open communication protocols standard
- Let consumers have control + opt in/out any time.

Ngā mihi

eeca.govt.nz

E E C A ENERGY EFFICIENCY &
CONSERVATION AUTHORITY
TE TARI TIAKI PŪNGAO



Flexibility and non-traditional solutions (NTS)

FlexForum
an Authority work programme

14 Apr 2026

Flex – according to us




Flex today

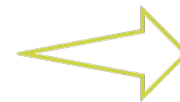
Large, sophisticated participants.
Bespoke demand response,
wholesale and retail products

The next frontier

Households, small businesses and
communities, participating at scale
through simple, low-friction pathways

Why is it important to us?

-  Balancing intermittency
-  Efficient investment
-  Enabling consumer participation/benefit



What are we doing?

Designing a dedicated flexibility and
non-traditional solutions work
programme

Public workshops in May

Why now and why the Authority?

As intermittent renewable generation increases, the power system requires flexible resources that can respond when renewable output falls or demand spikes to **maintain reliability**.

Affordability – \$2b+ in distribution network growth coming, more for transmission. Flexibility can defer or avoid some of these costs to consumers.

Large potential – EECA study suggests 1.9 GW of flexible load in the system now.*

Timing – Flexibility projects are moving from pilots to scale. The Authority can play a role in accelerating this shift.

Flexibility is central to our statutory objective – improves competition, reliability and efficient operation of the system.

Flexibility touches every part of the system – spans markets, pricing principles, distribution operation, consumer participation and system operation settings. Our mandate allows us to take a coherent system-wide approach.

System pressures are increasing (electrification, peak demand growth, and more variable generation) – we need a coordinated response to enable needed flexibility.

A dedicated programme provides clarity to the sector about how we see our role and what we plan to do.

Our regulatory functions



Monitor, inform and educate

We monitor market behaviour and make data, information and tools available to help improve understanding of the electricity markets by consumers and industry participants.



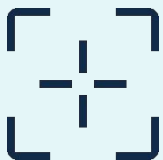
Operate the electricity system and markets

We are responsible for the efficient day-to-day operation of the electricity system and markets through contracted service providers.



Enforce compliance

We monitor, investigate and enforce compliance with the Electricity Industry Act 2010, its Regulations and the Electricity Industry Participation Code 2010 by industry participants to create a fair and competitive market.



Promote market development

We propose amendments to the Code to deliver better outcomes for consumers today and in the future.



Protect the interests of consumers

We are responsible for protecting the interests of domestic and small business consumers in relation to the dealings of industry participants supplying their electricity.

Outcomes we want to enable

Participation and access



- Flex is valued and rewarded at an efficient level
- Flex can be offered (simply) by a wide range of participants
- Flex is visible and actionable (can be triggered, is able to respond and be relied upon)
- Consumer protections are in place

Competition and efficient investment



- Competitive market arrangements allow flex to compete with traditional solutions, driving down cost of delivering a reliable electricity supply

Future readiness



- Distribution systems (in whatever form) can securely manage bidirectional power flows
- Digital foundations are in place
- Flex-enabled installation of devices and assets is BAU
- Innovation drives future flex

Flex at the Authority: now and next

Issue	Current work	What we could do next
Lack of price discovery & transparent valuation	Retail market monitoring – flex services Flexibility hedge product dashboard Industrial demand flexibility roadmap	<ul style="list-style-type: none"> • Set a clear pricing pathway so time-varying, cost-reflective signals become the foundation for scalable flexibility. • Lower participation barriers by enabling simpler, proportionate access for flexible and aggregated resources. • Standardise where it reduces friction, including products, contracts, baselining, and network signals. • Embed flexibility as a default in planning, alongside traditional network investment options. • Build confidence to substitute flexibility for capex through clearer assurance and risk frameworks.
No standardised products & settlement frameworks	Super peak hedge Standardised demand flexibility hedge product (co-design)	
Weak or inconsistent tariff signals	Mandatory time-varying tariffs (retail and distribution) Rebates for peak injection Ongoing distribution pricing reform (cost-reflective)	
Data governance & interoperability	Digitalisation system map, CDR pending	
Immature market access for small players	Power Innovation Pathway	
Network procurement not standardised	Guidance on distributor involvement in flex	

Highlights from submissions to our joint open letter to distributors on NNS

- Broad support for the intent of the letter
 - regulators working together, enabling innovative solutions, better outcomes for consumers
- Everyone broadly agrees
 - NNS can play an important role if given enough lead time and taken more seriously
 - Pricing is key to scaling flex
 - Some saw a pricing-led, automated flex end state
 - Others cautioned price signals are diluted and need complementary controlled flex solns
- Flex is valuable but “risky”
 - Carries new risks vs traditional solns – deliverability at critical times
 - NNS most valuable where
 - Demand growth uncertain
 - Investment deferrable (smaller peaks are the cause)
 - NNS buys time
- Calls for standardisation, leadership, coordination and clear principles across regulators
- Authority – pricing reform – guidance on pathway to cost reflective, time-varying distribution pricing

What next – have your say!

Public workshops in May
QTN, WGTN, AKL