

FN-25-15 Fortnightly report 1 August 2025

This report summarises items that may be of interest to the Minister for Energy but do not require a formal briefing. Further information can be provided on request. Substantive items and decision papers will be provided by briefing.

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1. Upcoming publications

New interactive format: Electricity Industry Participation Code	
Strategic outcome	Operational efficiency
Purpose	<p>The Electricity Authority (the Authority) is publishing an interactive, digital version of the Electricity Industry Participation Code (Code).</p> <p>Until now, the Code has only existed online as an over 1500-page PDF. It is hard to use, navigate, search and share.</p> <p>The new online format will provide user-friendly access to industry regulation, similar to the New Zealand Legislation website. This will reduce the time and effort it takes for industry participants to navigate their obligations, improving efficiency.</p>
Action and timing	Launch: Week of 18 August 2025

2. Consultation: upcoming and underway

Distribution network information visibility	
Strategic outcome	Secure and resilient, Efficient
Purpose	<p>The Authority will consult on enhancing public access to key distribution network information, such as the location of spare network capacity.</p> <p>Access to this information will lower costs to consumers, for example, by identifying locations where it costs less to connect.</p>
Action and timing	Consultation period: six weeks, mid-August - end September 2025. Industry workshop: mid-September.

Current and future consultations previously outlined in FN-25-14 and -13:

Current consultation	Consultation period
Promoting reliable electricity supply – Code amendment proposal on common quality-related information	1 July - 12 August 2025
Enabling consumer mobility by improving access to electricity product data	15 July -12 August 2025
Future system operation	24 June - 19 August 2025

Future consultation	Consultation period
Energy Competition Task Force initiative: Establishing an Emergency Reserve Scheme (2D)	31 July - 28 August 2025
Amendments to Transmission Pricing Methodology	1-29 August 2025
Review of Code amendment to the System Operator's information gathering powers	8 August - 5 September 2025
Energy Competition Task Force initiative: Super-peak standardised flexibility product (1B)	Mid-August - late September 2025

3. Upcoming Code amendments

3.1. There are no Code amendments that require tabling.

4. Deep dive: Investment pipeline monthly update

What is in the generation investment pipeline as at 1 August 2025:

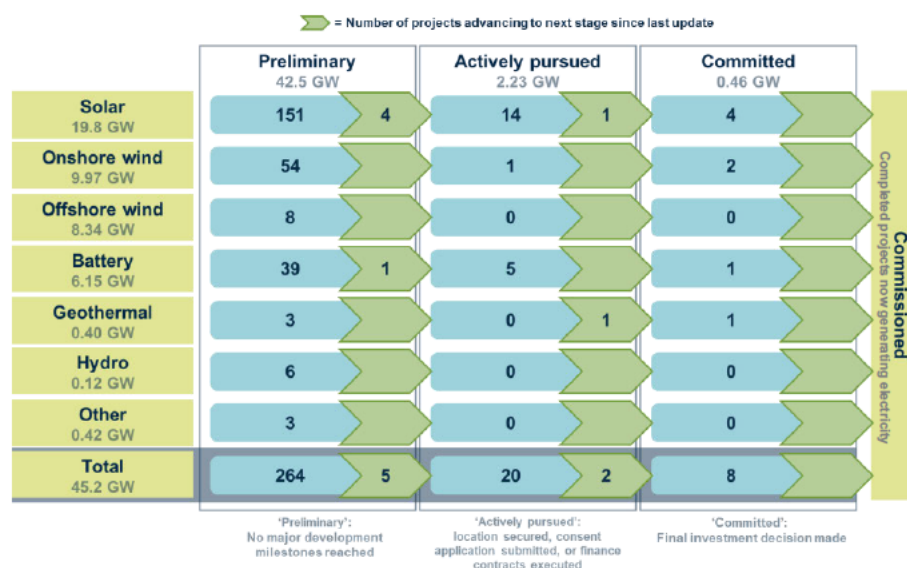
45.2GW total capacity	292 projects	102 developers	84.3% intermittent
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Key out-takes

- 703MW of new generation has been commissioned since November 2023.
- 833MW is currently under construction or scheduled to begin construction this year.
- 37.7GW of projects have progressed beyond the first stage of Transpower's grid connection process. Of those, 16.3GW are planned for completion before 2030, and of these, 12.9GW are owned independently.
- Since our 4 July update:
 - One battery, one geothermal and five solar projects advanced along the pipeline.
 - Total pipeline project capacity reduced by 12.9GW. Transpower removing speculative projects resulted in this month's significant decrease.
 - We updated our [Generation investment pipeline dashboard](#) to improve insights.

s 9(2)(b)(ii)

Project advancement since 4 July:



5. Deep dive: Network connections stage 2

- 5.1. The Authority's network connections project will remove inefficiencies and barriers to connecting businesses, housing, industrial plant, public transport and other critical services to the network. More efficient network connection benefits all consumers through enabling new housing, allowing greater electrification of our energy use, and creating economic growth.

The work programme has multiple stages:



STAGE 2 Phases, dates for consultation on preferred options, and issues being addressed

Phase 1	Oct 2025	Export limits (the rules distributors impose on surplus generation exported into the network); default inverter settings (eg, for solar panels) to streamline application approvals
Phase 2	~ Q2 2026*	Small scale rooftop solar processes; application fees
Phase 3	~ Q4 2026	Default terms and conditions for a connection contract; mandatory dispute resolution processes

* Once phase 1 is complete, the Authority will move onto phase 2. Therefore, timing is dependent on the volume and complexity of submissions for the previous phase. Phasing means stakeholders can meaningfully respond to consultation, and work can be sequenced logically. Based on delivering benefits to consumers, we have prioritised small scale distributed generation and associated issues for stage 2.

Remaining issues for further stages include (but are not limited) to:

- How **capacity rights** are allocated during the application process, and after approval, including for unused approved capacity the applicant paid for.
- The **minimum connection and operation requirements** for connections to all networks.
- **Congestion and curtailment** – rules a distributor may impose to require a reduced output for generation already connected, and other limits the distributor may impose if the network reaches its maximum safe limits.
- **Competition for network studies and capital works** – to require distributors to permit third-party contractors to perform this work on their networks. Many distributors do not allow this. They have their own staff or a single preferred contractor that access seekers must use. This can drive up costs and increase timeframes as there is no competition.

6. Energy Competition Task Force work programme update

Initiative	Current stage	Next published milestone	Next update	Status
PPAs (1A)	Update paper published 28 May	Now part of level playing field work	N/A	Complete ✓
Standardised flex product (1B)	First phase completed – standardised super-peak hedge product launched January 2025	Publish options paper on regulating super-peak standardised flexibility product in August (mid-August)	Late July/early August – issues and options paper	On track
Virtual disaggregation (1C)	Outline published for feedback	Now part of level playing field work	N/A	Complete ✓
Level playing field measures (1D)	Outline of measures and proposal for non-discrimination obligations published (submissions closed 7 May) Currently undertaking further targeted analysis and Board-level engagement in response to submitter feedback	As advised on 12 June, potential Code change to introduce principles-based non-discrimination obligations to come before Authority Board on 6 August: <ul style="list-style-type: none"> In principle decision to be announced 12 August with consultation following as soon as possible thereafter (September), to enable Code change decision this year 	Early August – updating you on Board's in principle decision	On track
Initiatives promoting consumer choice (2A-C)	Authority Board approved Code changes on 30 June to require distributor rebates for grid injection and time-varying retail pricing for consumption and supply	Publish Code change decisions (16 July), which require: <ul style="list-style-type: none"> distributors to provide negative charges for grid injection by mass market consumers retailers to provide time-varying price plans for electricity consumption and injection retailers to provide distributors with consumption data to support these changes 	N/A – Code changes published 16 July	Complete ✓
Short-term flexibility revenue (2D)	Issues and options (roadmap) paper published 28 May, consultation closes 3 July Finalising consultation on first roadmap action (emergency reserve scheme)	Publish emergency reserve scheme (ERS) options paper end-July: <ul style="list-style-type: none"> Rewards additional industrial demand response; aim to have this in place for winter 2026 	Mid-July – ERS consultation paper for publication	On track

7. Quarter 1 2025/26 key deliverables

	Key deliverable	Category	Status
July	Proposed changes to help ensure the System Operator has access to the information it needs to operate the power system – improving security of supply	Statutory consultation (1 July)	Delivered ✓
	Options to improve access to data that will improve competition and support the development of new products and services – improving consumer choice and affordability	Statutory consultation (1 July)	Delivered ✓
	Task Force announcements to better reward customers and reduce costs: <ul style="list-style-type: none"> distributors to pay a rebate to consumers when they supply at peak times retailers to offer more time-of-use pricing retailers to better reward consumers for supplying power 	Decision (16 July release)	Delivered ✓
	Improvements to network connection pricing and processes that will help new housing developments, electrify energy use, and grow the economy	Decision (18 July release)	Delivered ✓
August	Task Force in principle decision to introduce non-discrimination obligations that would help independent retailers and generators better compete – supporting innovation and lower prices (subject to Board decision)	In principle decision	On track
	Task Force consultation on options to support lower cost super-peak hedges on the wholesale market – lowering overall costs and improving affordability	Statutory consultation	On track
Sep	Applications open for the Power Innovation Pathway, where innovators receive advice and support to bring new products and services to market	Industry support	On track