Roaming: The Commercial Guide

What to settle before the credentials handshake

The technical side of roaming takes a day. The commercial side is where the value and the risk both sit.

FOR Commercial leads at CPOs and eMSPs

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- When roaming is not worth it, which is more often than assumed

CHAPTER 01

Two roles, often both

Roaming has two sides and most conversations conflate them. Getting the vocabulary right is not pedantry — the commercial terms, the risks and the value are different depending on which side you are on, and many operators are on both at once.

The charge point operator side

You own chargers. You publish their locations and live status to partners, accept their drivers' credentials, and are paid for the energy those drivers consume. Your revenue is incremental traffic you would not otherwise have seen.

What you give up is the driver relationship on those sessions. The driver experiences their own provider's app, sees their provider's price, and may not know your name. That is the trade.

The e-mobility service provider side

You own drivers. You give them one account, one payment method and one history across networks you do not own, and you take a margin on what they spend elsewhere. Your capital requirement is small and your differentiation is entirely in the experience and the coverage.

Why both

A network with its own chargers and its own driver base is already both, whether or not it has signed anything. Once you have an app, extending it to partner networks is the cheapest coverage you will ever add. Once you have chargers, accepting partner drivers is the cheapest traffic.

ROLE	YOU EARN	YOU RISK	GROWS WITH
CPO	Energy sales to visiting drivers	Losing the driver relationship	Sites
eMSP	Margin on partner sessions	Being undifferentiated	Drivers
Both	Both, on the same platform	Complexity in settlement	Either

What roaming does to your app strategy

COVERAGE STOPS BEING A REASON TO INSTALL YOUR APP

If drivers can reach your chargers through three other apps, "we have the most chargers" is no longer a reason to use yours. What remains is price, reliability and experience. That is a healthier basis for a driver product, and it is uncomfortable for networks whose only advantage was exclusivity.

The sequence to adopt it in

01 Publish locations and status first. It is low risk, it makes your sites findable, and it requires no commercial commitment.

02 Accept partner tokens next, once you have decided your wholesale price.

03 Consume partner networks as an eMSP third, because that is where the settlement complexity is.

04 Only then consider a hub, if the number of bilateral relationships has become the constraint.

Operators who start at step three, because coverage is the visible benefit, take on the reconciliation burden before they have any of the revenue.

The modules that matter

OCPI is modular, and a partner claiming to support it may support a subset. Which subset determines what the arrangement can actually do, so this is a commercial question dressed as a technical one.

Locations

Your sites, connectors, opening hours and live status, published to partners. The lowest-risk module and the one to start with: it makes you findable and commits you to nothing.

The commercial consideration is that your location data becomes someone else’s app content, including your prices where you publish them. Decide deliberately which sites to expose rather than publishing everything by default.

Tokens

The partner’s driver credentials, which you must be able to authorise at your chargers. This is where a roaming session actually becomes possible, and where the credit question arises: you are now delivering energy on the strength of a partner’s assurance that their driver is good for it.

Sessions and CDRs

Sessions are the live view; CDRs are the billing record. The CDR is what you invoice on and what a partner disputes, so it matters far more.

STORE THE PARTNER'S OWN SESSION IDENTIFIER

When a driver complains six weeks later, the only useful thing is being able to point at the same record the partner holds. An arrangement where each side has its own identifier and no mapping produces disputes that cannot be resolved, only conceded.

Commands

Remote start and stop initiated by the partner on your charger. Convenient for the driver and the module most likely to expose differences in how the two platforms handle failure — a remote start that times out, a stop that arrives after the session already ended.

It is also the module where a bad implementation is most visible to a driver, so it is worth testing properly before enabling rather than after.

Tariffs

Publishing your prices so a partner can show them. Useful for driver experience and it constrains you: a price shown in a partner app is a price you have quoted, and changing it frequently produces disputes about which applied.

What to ask a prospective partner

01 Which modules do you implement, in which roles, and at which OCPI version?

02 How quickly do you push CDRs after a session ends, and what is your correction process?

03 Do you support real-time status, or periodic location refresh only?

04 What happens at your end when our system is unreachable — do you fail the session cleanly?

05 Can you provide a sandbox for us to test against before we go live?

The second question is the one that predicts your reconciliation burden. A partner who pushes CDRs weekly, in bulk, with no correction mechanism will consume more of your finance team's time than the revenue justifies.

CHAPTER 03

Pricing to a partner

The commercial core of a roaming agreement is one decision: what you charge the partner per unit, and how it relates to what you charge a walk-up driver.

Two structures

STRUCTURE	YOU RECEIVE	DRIVER SEES	SUITS
Retail pass-through	Your retail price, less a partner fee	Your price, plus their markup	Simple relationships
Wholesale rate	An agreed lower rate	Whatever the partner chooses	Volume partners

Pass-through is simpler and keeps your price visible to the driver, which protects your positioning. Wholesale gives the partner freedom to price and gives you a predictable rate, at the cost of no longer controlling what a driver at your charger is told they are paying.

Setting the wholesale rate

Above your landed cost, obviously, but the more useful anchor is what the session is worth to you. A roaming driver at a site running at low utilisation is close to pure contribution. The same driver at a site that is already busy at peak may be displacing a full-margin walk-up session.

PRICE ROAMING PER SITE, NOT PER NETWORK

A flat wholesale rate across a network means your busiest sites subsidise your quietest. Where the platform allows it, exclude constrained sites from roaming at peak, or price them differently.

Who carries the payment risk

You deliver energy to a driver you have no relationship with, on the strength of a partner's token, and invoice the partner afterwards. If the partner does not pay, you have already delivered the energy.

01 Agree payment terms explicitly, and keep them short — monthly rather than quarterly.

02 Set a credit limit per partner and monitor consumption against it.

03 Agree what happens when the limit is reached, before it is reached. Suspension is legitimate and must be written down.

04 Understand who the partner actually is. A hub aggregating many small providers changes who you are exposed to.

Fees beyond energy

Decide whether session fees and idle fees pass through to roaming drivers. Idle fees generally should — the bay is scarce regardless of whose driver is occupying it — and they need to be visible to the partner so their driver can be told.

A roaming driver who receives an unexplained idle fee complains to their provider, who disputes it with you. That is an entirely avoidable cost of not having agreed it.

Reviewing it

Roaming rates are set once and forgotten more often than any other price in charging. Put a review date in the agreement, and look at the volume, the sites it lands on, and whether it is displacing retail sessions. If it is, the rate is too low.

CHAPTER 04

Settlement and disputes

Roaming settlement is where a relationship that works technically becomes a burden commercially. Two systems each produce records, the records disagree at the margins, and somebody has to reconcile them every month.

Whose records govern

Agree this in the contract, plainly. The usual and sensible answer is that the CPO's records govern, because the CPO owns the meter and the meter is the evidence. An eMSP disputing a CDR is disputing a meter reading, which is a high bar and appropriately so.

> WITHOUT THIS CLAUSE, EVERY DISAGREEMENT IS A NEGOTIATION
>
> Two parties with different totals and no agreed authority will split the difference, repeatedly, and the smaller party will lose more often. One sentence in the contract removes an entire class of monthly friction.

Cadence

01 CDRs pushed promptly after each session, not batched weekly. Late CDRs are the single largest source of reconciliation pain.

02 A statement monthly, on a fixed date.

03 A dispute window — thirty days is normal — after which a statement is final.

04 Payment a stated number of days after the statement, held to.

Reconciling

Three checks each month, and they should take minutes rather than days if the CDRs arrived promptly.

CHECK	CATCHES
Session count, yours vs theirs	Sessions that never produced a CDR
Energy total, yours vs theirs	CDR corrections you did not receive
Amount, at the agreed rate	A rate applied wrongly on either side

A session on your system with no matching CDR is the common failure, and it is usually a delivery problem rather than a dispute. Chase it in the month it happens, because after the dispute window it is your loss.

Driver disputes

A driver complains to their provider about a session on your charger. The provider cannot answer it — they have a CDR and no meter values, no fault history and no message log. It comes to you.

01 Agree a route for these, with a named contact rather than a generic address.

02 Agree what evidence you will provide: meter start and stop, the tariff applied, the stop reason.

03 Agree a response time, because the driver is waiting and the provider is exposed.

04 Keep the partner's session identifier on your record, so you can find it from what they send you.

When to write off

Small discrepancies will persist — a handful of sessions a month across thousands. Agree a materiality threshold below which neither side raises a dispute. The alternative is spending more on reconciliation than the differences are worth, which is the state most roaming relationships drift into.

Publishing selectively

The default assumption is that more visibility is better, so operators publish everything. That is right for a network with spare capacity everywhere and wrong for most networks, which have a few constrained sites carrying a lot of the margin.

Which sites to expose

SITE	PUBLISH?	WHY
Low utilisation, good location	Yes	Incremental traffic at near-pure contribution
Corridor site	Yes	Roaming drivers are exactly who needs it
Constrained at peak	Selectively	You may be displacing full-margin sessions
Private or restricted access	No	A driver who cannot get in leaves a review
Depot or workplace	No	Not a public site
Newly commissioned	Not yet	Prove it works before strangers rely on it

The fourth row causes real harm. A site inside a gated complex, published as public, produces drivers who navigate there, cannot get in, and record their opinion permanently.

What you are handing over

01 Your locations, which is a map of your network for anyone who wants one — including competitors who consume the same feeds.

02 Live availability, which is genuinely useful to drivers and reveals your utilisation to anyone watching over time.

03 Your prices, where you publish tariffs.

04 The driver experience, on those sessions, to a partner whose app you do not control.

AVAILABILITY DATA REVEALS UTILISATION

Anyone sampling your published status over a month can compute how busy your sites are. That is not a reason to withhold it — drivers need it — but it is worth knowing before assuming location publishing is commercially neutral.

Accuracy is the obligation

Publishing carries a duty to be right. Stale status is worse than none: a driver who diverts to a charger shown as available and finds it faulted blames the network, and the review names you rather than the app.

- Push status changes promptly rather than on a slow poll.
- Publish a unit as unavailable the moment it faults, not when someone notices.
- Keep opening hours and access notes current, especially for sites inside another business.
- Remove decommissioned sites immediately. A charger that no longer exists is the worst possible search result.

Reviewing what you publish

Quarterly, look at which published sites are actually producing roaming sessions and at what rate. Sites producing none are giving away visibility for nothing; sites producing many at peak may be worth pricing differently rather than withdrawing.

CHAPTER 06

When to decline

Roaming is presented as free incremental traffic. It is incremental only where there is spare capacity, and at a site running near its limit at peak it is substitution — a discounted session displacing a full-margin one.

The substitution test

For any site, ask what would have happened to that connector-hour without the roaming driver. If the answer is "nothing", the session is pure contribution and roaming is excellent. If the answer is "a walk-up driver would have used it", you have sold the same hour at a lower rate.

THE NUMBER THAT ANSWERS IT

The share of operating hours a site spends at full occupancy. Below roughly ten percent, roaming is almost entirely incremental. Above twenty-five, a meaningful share of roaming sessions are displacing retail ones and the rate needs to reflect that.

Other reasons to decline

01 A partner whose CDR practice would cost you more in reconciliation than the revenue is worth. Ask about cadence and corrections before signing, not after.

02 A partner with unclear credit standing, where you would be delivering energy on account to an entity you cannot assess.

03 An exclusivity request. A partner asking to be your only roaming relationship is asking you to cap your own coverage.

04 A rate below your landed cost at the sites in question. Volume at a loss is the most expensive kind of growth.

05 A relationship that would expose private or restricted sites, where you cannot control who arrives.

Declining well

Most declines should be partial rather than absolute. Publish the sites with capacity and withhold the constrained ones. Offer a rate that works at your busy sites rather than refusing the relationship. Agree a smaller scope now with a review date.

A partner who has been given a reasoned partial yes will come back. One who has been refused outright signs with somebody else and does not.

The thing worth protecting

The driver relationship. Roaming is worth having, and it should not be allowed to turn your entire network into wholesale capacity sold through other people's apps. Keep a reason for drivers to hold an account with you — better pricing, reliability they can count on, sites only you have — and roaming becomes an addition rather than a replacement.

About this document

Written by the team building zevOS, the charge point management platform. We publish this kind of thing because operators who understand utilisation, demand charges and settlement make better decisions — including about us.

Corrections and disagreements are genuinely welcome. If something here is wrong, or true in most states but not yours, write to support@zevos.ai and we will fix it in the next revision.