

EV Policy Blueprint for Action:





What are the high priority market interventions?

Pennsylvania Electric Vehicle Policy Bootcamp
August 6, 2020



Electrification
Coalition

2019 & 2020: OEMs Lean In



**BMW: 33% OF SALES
TO BE EV BY 2025, 50%
OF SALES BE EV BY
2030**

**GM TO ANNOUNCE 23
ELECTRIC NAMEPLATES
BY 2023**

**HYUNDAI/KIA: 1 MILLION
EVs IN 2025**

**TOYOTA: 1 MILLION
EV SALES PER YEAR
BY 2030**

**NISSAN/ RENAULT: 1.5
MILLION CUMULATIVE
EV SALES BY 2020**

**VW: 20-25% OF
ANNUAL SALES EV BY
2025**



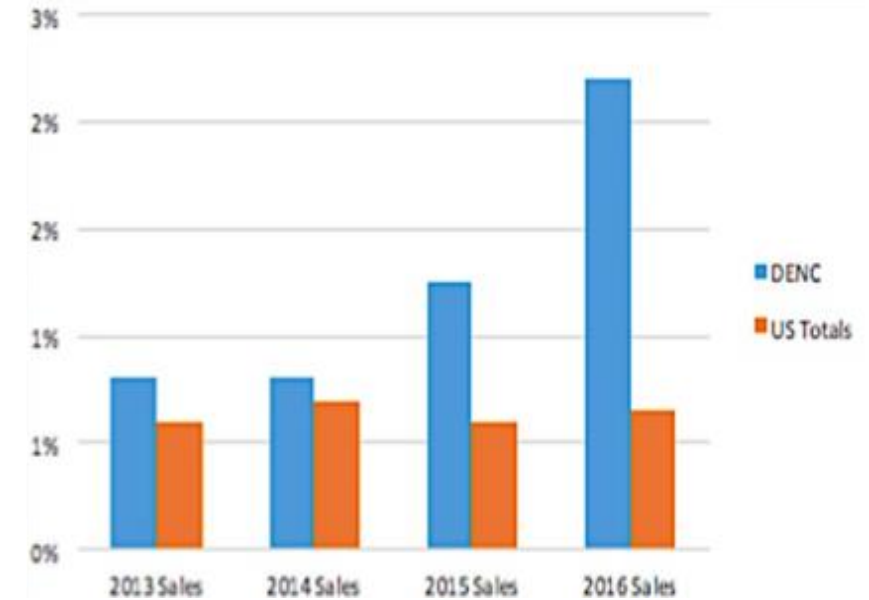
Our Experience Accelerating EV Adoption

First: Start Local, Demonstrate Results

Example: The EC's Accelerator Community Approach

Highly active “EV ecosystem” to accelerate EV adoption in targeted communities

First launched in Fort Collins, Colorado in 2013.



Outcome:

EV Sales 8 times higher than national average within 3 years.

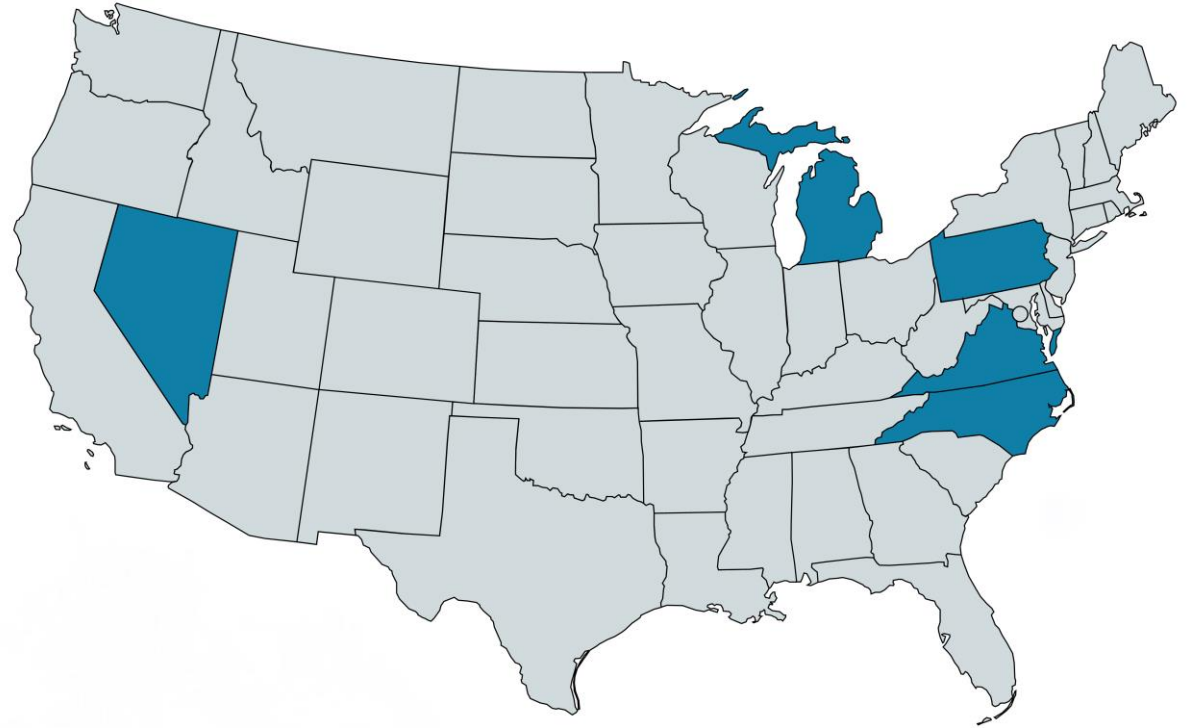
Our Experience Accelerating EV Adoption

Scale Up Impacts



State EV Policy Accelerator Program

Priority States
PA, VA, NC, MI, NV



**POLICY
BLUEPRINTS**



**RAPID
RESPONSE**



**POLICY
TOOLKITS**

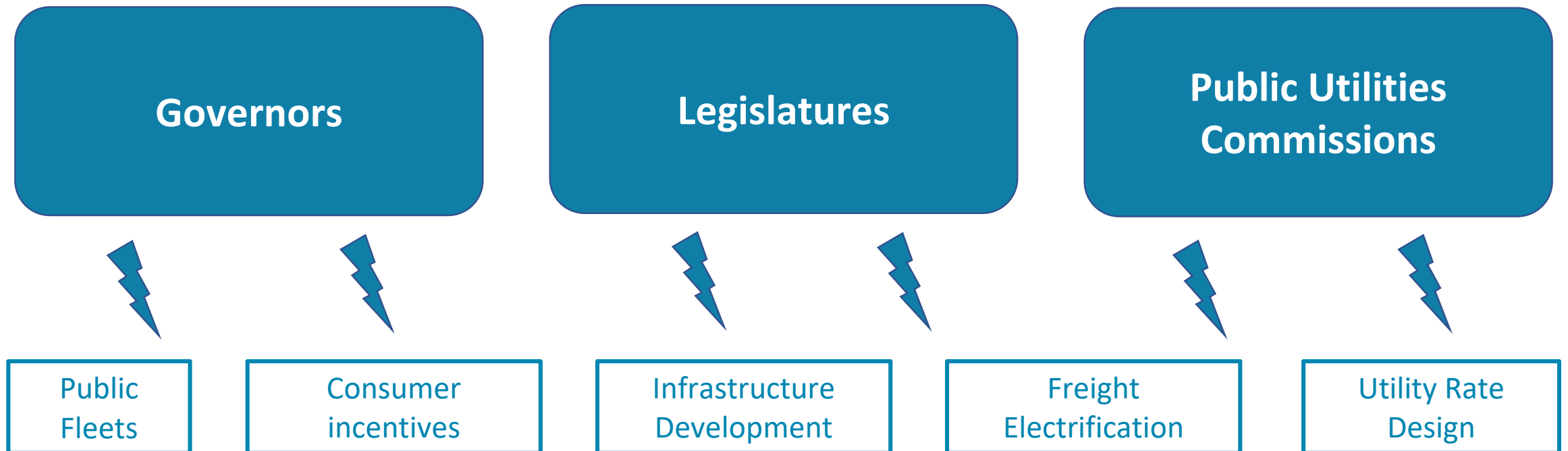


**TECHNICAL
ASSISTANCE**

Electrification Coalition

State EV Policy Accelerator

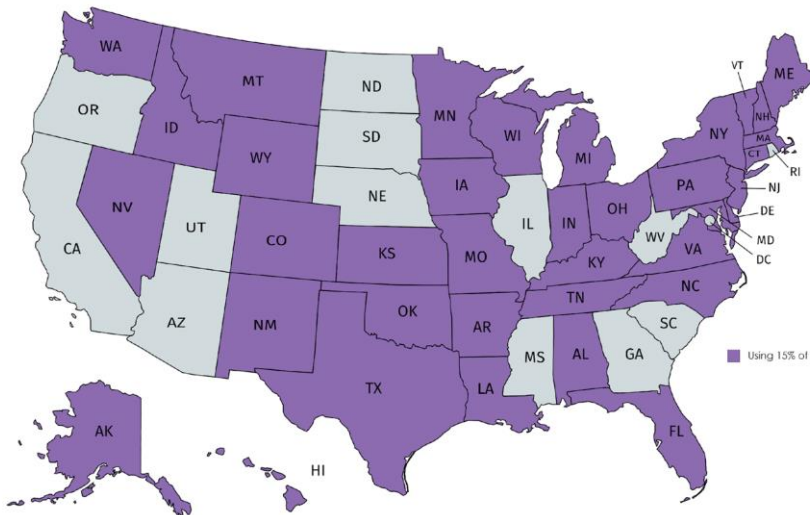
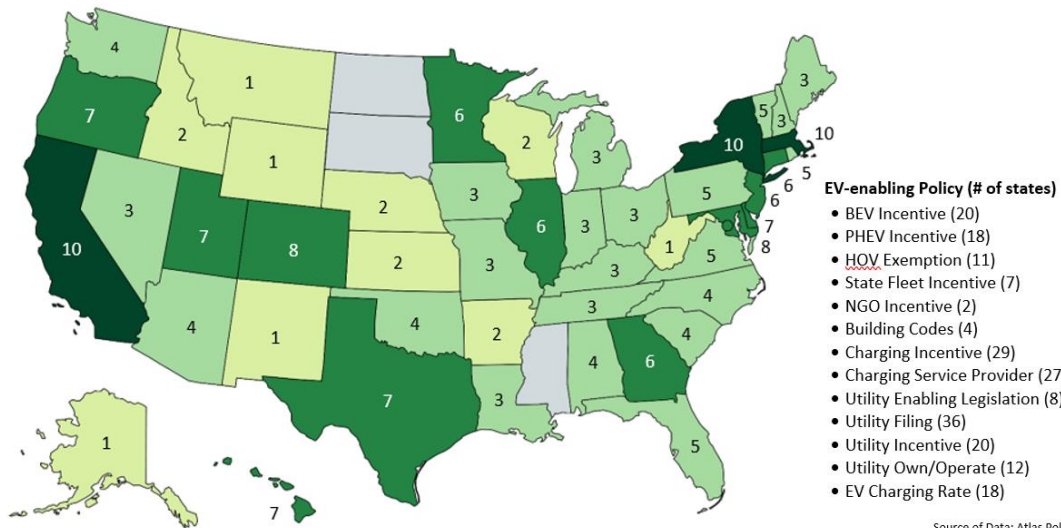
The EC will be partnering with state leaders to support and create ambitious policy in order to drive all sectors of the EV market.



States Revving Up

But Still a Ways To Go

of KEY EV-ENABLING POLICIES BY STATE



\$2.7+ Billion Divided
Among the States, plus
\$2B from Electrify
America investments

Map shows 37 states
using full 15% allowable
for EVSE

Other funding used for
vehicles and incentives

VEHICLE
INCENTIVES

EVSE
INCENTIVES

MD/HD
INCENTIVES

EV RATES

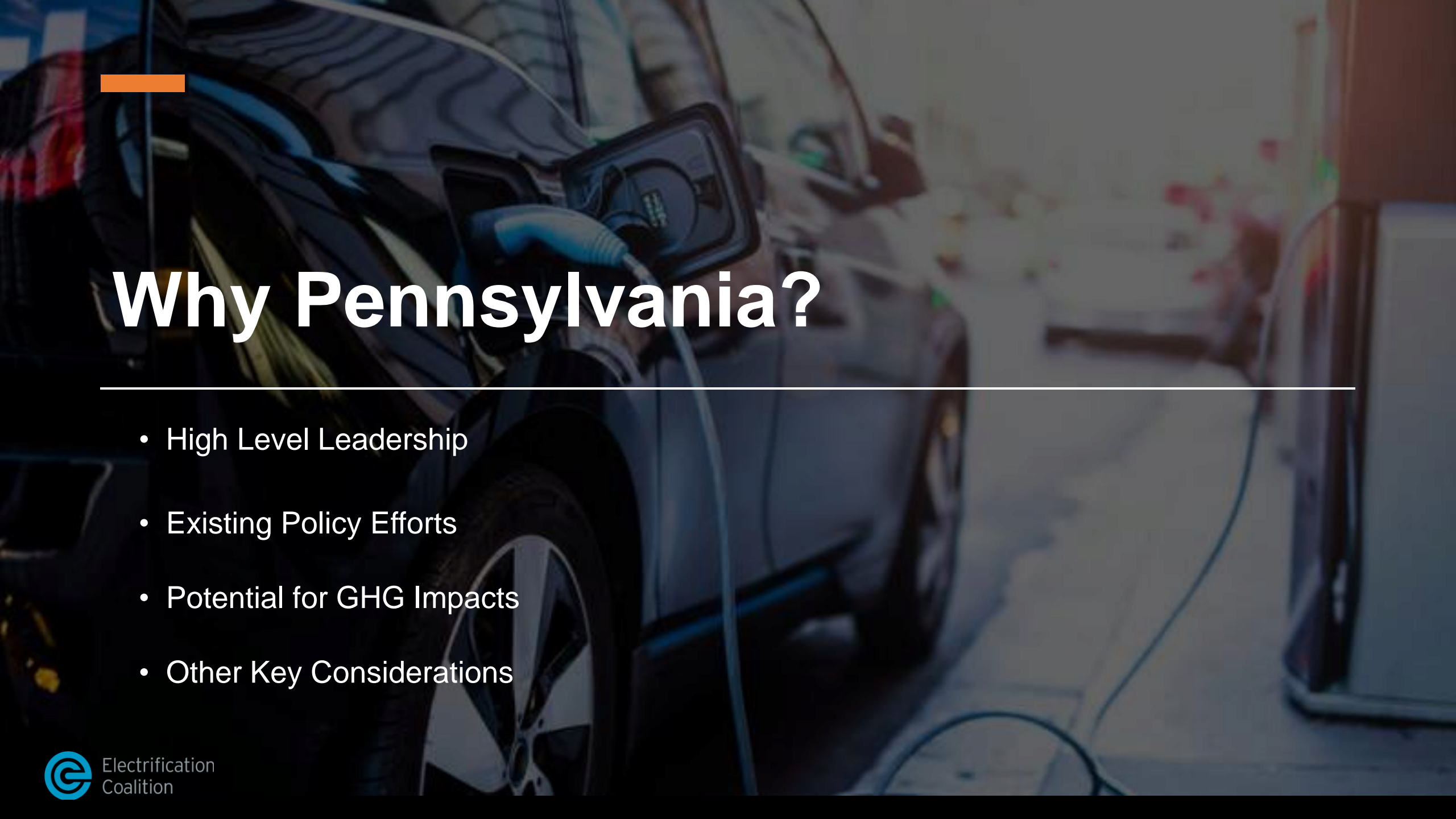
BUILDING
CODES

FLEET
TARGETS

DIRECT
SALES

FUEL
STANDARDS

EQUITY



Why Pennsylvania?

- High Level Leadership
- Existing Policy Efforts
- Potential for GHG Impacts
- Other Key Considerations

Pennsylvania

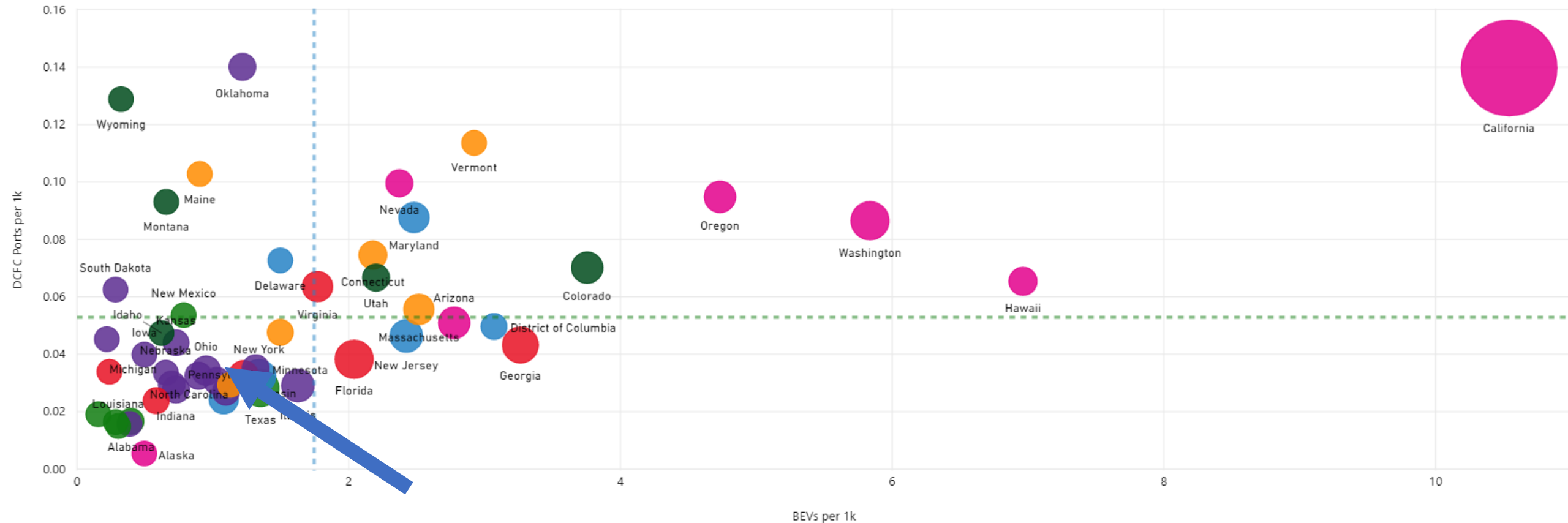
EV Market In Context

State	EV Sales (2019)	EV Market Share (2019)	BEVs per 1k	DC Ports per 1k	DCFC Ports per 1k BEVs	L2 Ports per 1k EVs
Washington D.C	1,008	4.77%	2.94	0.03	11.43	142.70
Maryland	6,762	2.06%	2.44	0.07	29.07	74.07
Delaware	782	1.65%	1.48	0.07	46.26	45.11
New Jersey	9,638	1.59%	2.34	0.04	16.47	28.00
New York	14,382	1.40%	1.30	0.03	21.96	72.61
Pennsylvania	5,960	0.91%	1.06	0.02	19.60	54.87

Pennsylvania

EV Market In Context

BEVs & DCFC Per 1k People



Pennsylvania Barriers to EVs



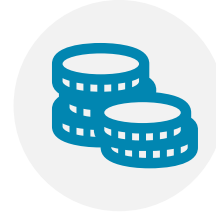
Policy &
Regulations



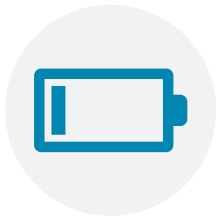
Awareness



Supply Chain



Economic



Technology &
Infrastructure



Decision-Making

Near Term Opportunities



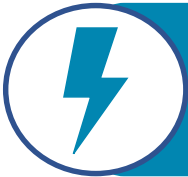
Light Duty Consumer Adoption



Freight



School Buses



Infrastructure and Rates

Light Duty Consumer and Fleet Adoption

Individuals

Expand EV access and awareness

- Sales targets
- Direct EV Sales (HB 1901)
- Expanding education and incentives

Public & Private Fleets

Encourage and support fleet acquisition efforts

- EV First policies
- Combining Capex and Opex to realize TCO savings
- Fleet EV procurement or GHG reduction targets

Mobility / TNC

Partner with localities to incentivize high utilization vehicles

- Clean miles standard
- Queuing, carpool lane access, and other QoL incentives
- Low / zero emissions zones

Opportunities for Freight

Incentives and Targets

- CA Advanced Clean Truck Rule
- MD/HD fleet procurement goals & procurement requirements
- Toll reductions
- Sales tax exemptions
- Weight limit exemptions
- Zero/Low Emission Zones
- Clean Fuels Standard
- Green Loading Zones
- Truck Stop Electrification Requirements

Utility Programs

- Streamlined EVSE Permitting
- Recovery of Cost - "Behind the Fence" Charging Infrastructure
- On-bill Financing – EVSE upgrades
- Commercial Rate Design
- Utility EVSE Ownership

Opportunities for School Buses

Reduce Capital Burden

- Add and Expand Incentive Programs
- Appropriate VW Settlement funds
- Combine capex and opex budget lines

Emission Targets

- Require annual fleet reduction in GHG

Procurement

- Fleet policy requiring fixed EV acquisitions
- EV First policy

Utility

- Utility partnership/investment
- MD/HD Specific Rates, Time of Use
- Address Demand Charges

Opportunities for Rates and Charging Infrastructure

Infrastructure

- (SB 596) Framework to build comprehensive EV Charging Infrastructure
- EV/EVSE Ratio Targets

Rate Design

- Time of Use Rates
- Address Demand Charges
- Direct utilities to file EV pilot programs and rate cases
- Utility role in EVSE rollout

Electric Corridors

- Statewide corridors
- Regional corridors
- Northeast Corridor Strategy
- Northeast Electric Vehicle Network

Regional Greenhouse Gas Initiative a potential revenue stream for EVSE and other EV projects.

Electrification Coalition

Changing the Future of Transportation.

Online:

www.electrificationcoalition.org

.

Contact:

Alissa Burger

Program Manager, Electrification Coalition
aburger@electrificationcoalition.org



Electrification
Coalition

1111 19TH STREET NW
SUITE 406
WASHINGTON, DC 20036

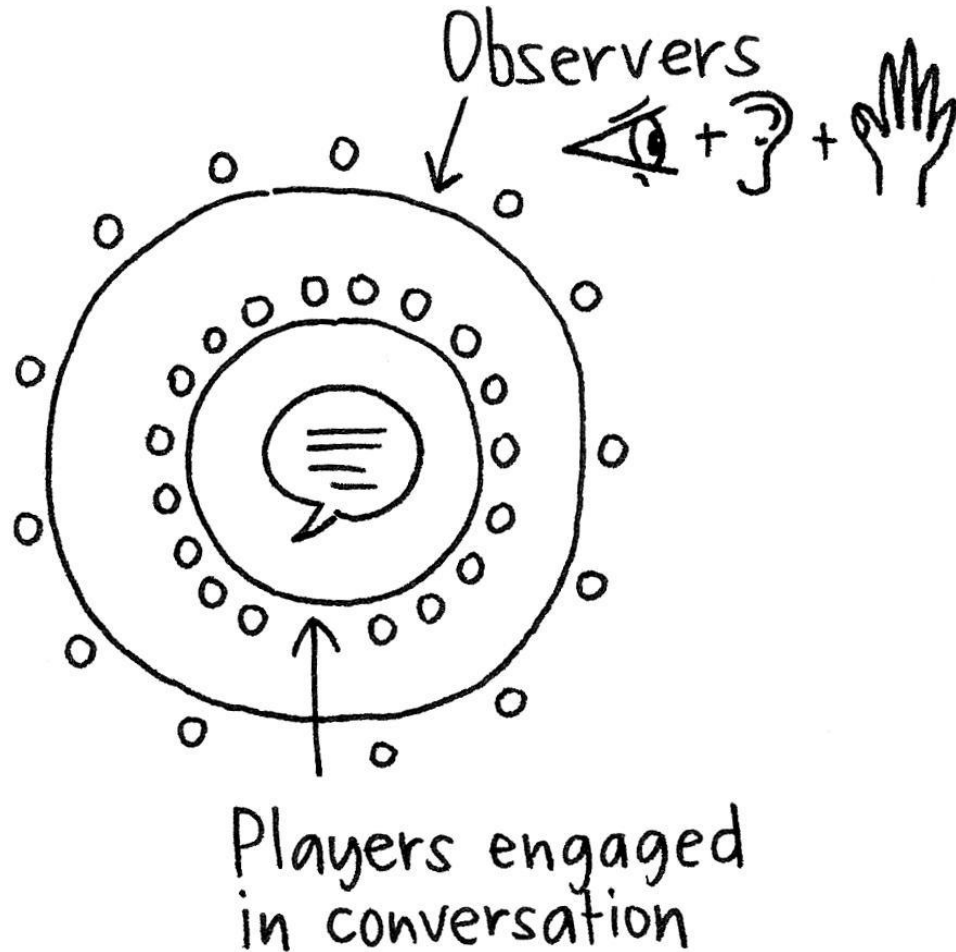
TEL: 202-461-2360
FAX: 202-318-8934
ELECTRIFICATIONCOALITION.ORG

Now We Want to Hear
From You!

Fishbowl Discussion



How Does a Virtual Fishbowl Work?



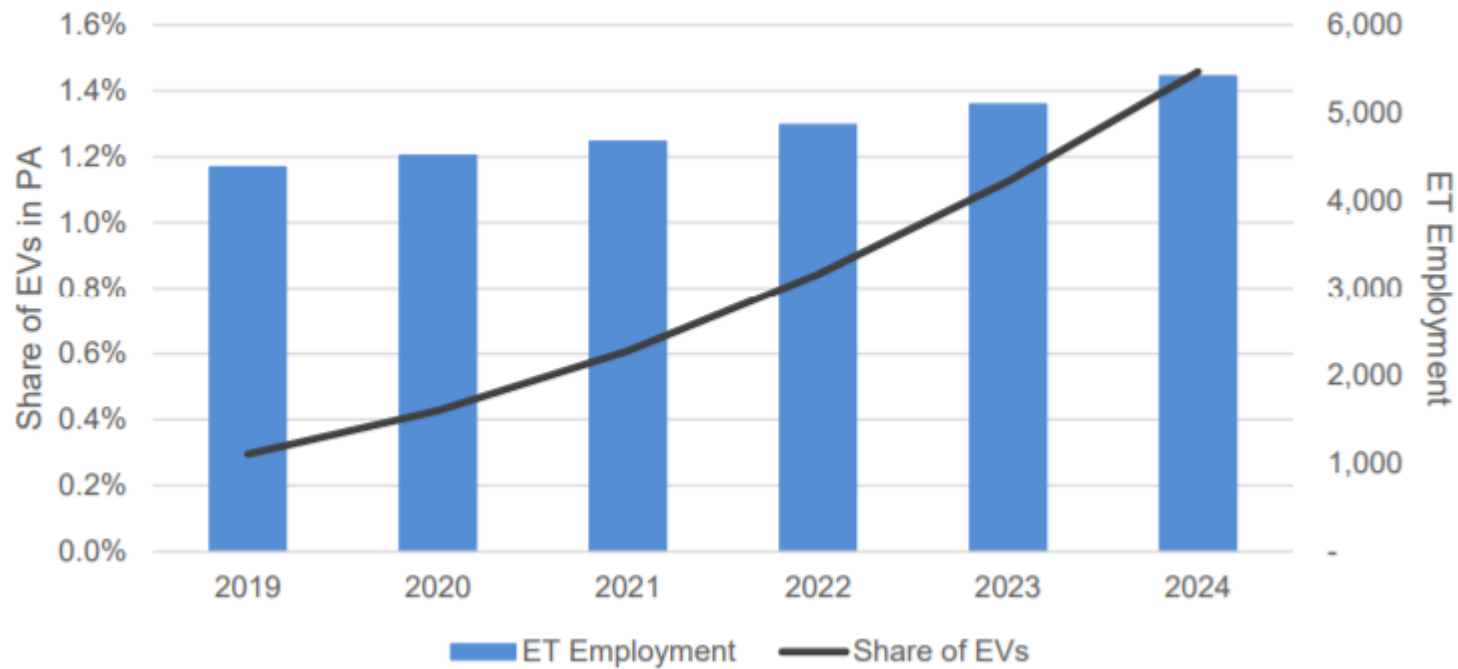
Be Respectful

Keep it to the Point

Chatham House Rules

Economic Development

Figure 1: Projected ET Employment and Share of Electric Vehicles (EVs)



- Electric transportation-related industry - \$434 million annually (0.6% GSP)
- Five-year industry job growth forecast: +24%
- Five-year overall economy job growth forecast: +3%