Keynote
NGA EV Grid Integration: Virtual State Policy Summit

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EV market growth has been strong

Source: EV Hub, Atlas Public Policy (as of September 2020)
The pandemic’s impacts are mostly uncertain

**Electric Vehicle Sales Set to Crash in 2020 Amid Coronavirus and Oil Price Shocks**

Global EV sales will plunge by more than 40 percent this year, Wood Mackenzie forecasts — and the coronavirus is not the only culprit.

KARL-ERIK STROMSTA | APRIL 08, 2020

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**Led by Tesla, electric vehicle sales are predicted to surge in 2021**

Production of electric vehicles is estimated to climb to at least 1.3 million and could reach 1.5 million depending on market conditions this year.

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CNBC

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**Electric Vehicle Sales to Fall 18% in 2020 but Long-term Prospects Remain Undimmed**

EVs more resilient as overall car market expected to shrink by 23% in response to health and economic crisis.

May 19, 2020

BloombergNEF
The EV industry faces several clear challenges

- **The up-front cost** of EVs is even more daunting during times of economic hardship.
- Gas prices have dropped, making the economics of EV ownership slightly less attractive.
- Potential charging station hosts are faced with different priorities.
- Some utility and state agency programs have scaled back or are on hold.
Regional and local challenges also exist

- Insufficient dealership inventory
- Lack of vehicle types (e.g., light trucks)
- Complex or confusing permitting processes
Opportunities outweigh the barriers to growth

**Momentum** – progress, policies, and programs to date.

**Environment** – clear skies and clean water are getting noticed.

**Funding** – potential for federal stimulus, extended tax credits, and more.

**Clean commuter option** – public transit may not be feasible for some.

**“Captive” audience** – ideal time for online research into EVs.
Utility engagement in transportation electrification is increasing

- Increasing number suggests greater interest and awareness.
- Not just California; notable activity in the mid-Atlantic and Midwest regions.
- The way commissions do business will shape 2020+ numbers.
- Still learning from active programs.

- High approval rates in 2018 (87%) and 2019 (72%).
- Make-ready programs are consistently approved/have seen the fewest denials.
- Approval rate of utility owned/operated proposals has increased.

- Primary focus is building out infrastructure.
- Managed charging (passive or active) is increasingly important.
- Utilities are prioritizing underserved communities.
- Partnerships are critical.

Data Source: EV Hub, Atlas Public Policy
State policy is driving EV programs and partnerships

- Utility Transportation Electrification Plans
  - Legislature or Commission directed
  - AZ, CO, MN, NM, OR, VA, WA

- Zero Emission Vehicle Initiatives
  - State sales requirements
  - Multi-State Task Force
  - REV West MOU

- Volkswagen Environmental Mitigation Plans
  - Light-duty EV charging
  - Medium- and heavy-duty EVs and charging
Thank you!

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