

May 2021

# California Cycle 3 ZEV Investment Plan



# Corporate social responsibility pillars



## Enabling electric transportation

Commitment to making the world a more sustainable place by driving electric vehicle adoption through infrastructure and education



## Environmental sustainability

Commitment to being carbon-neutral or better, powering our stations with renewable energy and building infrastructure sustainably



## Community support

Unlocking electrification for all, including investments and education in disadvantaged, low income and rural areas



## Equality & diversity

Striving to achieve diversity and inclusion in everything we do, from investing to hiring and supplier relationships



# Progress to date

⚡ Largest and most powerful open fast charger network

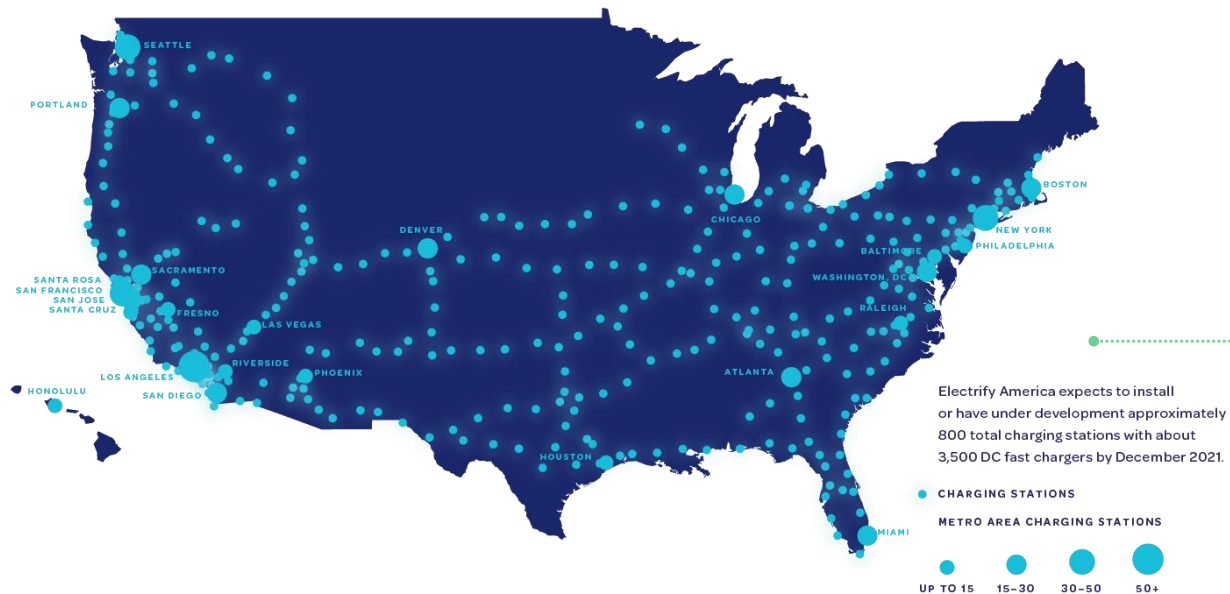
⚡ Reaching all California communities, including rural and disadvantaged communities

⚡ Award winning network with highest customer satisfaction

⚡ Expanding the market and access through education and outreach



# The largest open ultra-fast network



## NUMBER OF STATIONS

May 2018

1

Today

600+

2021

800

## NUMBER OF CHARGERS

May 2018

4

Today

2,600+

2021

3,500

# Serving all of California including low-income, disadvantaged and rural communities

## Electrify America's California Network

**Station spacing:** 9 mi. (avg.), 42 mi. (hwy avg.)

**Chargers per site:** 3-10

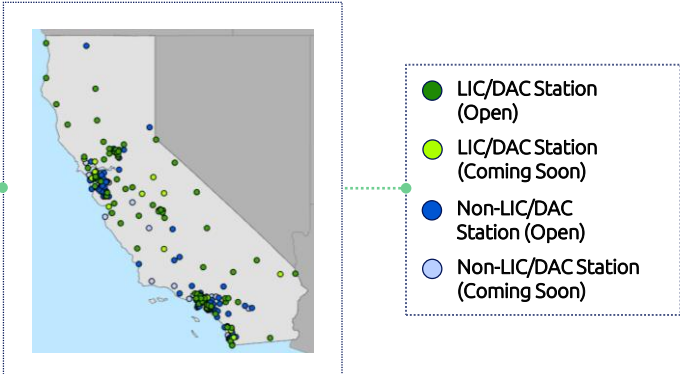
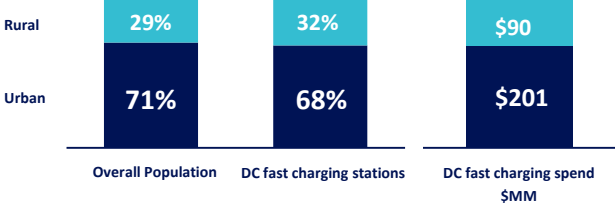
**Charging speed:** 3-20 miles/minute

**Access:** 90% of Californians live within 15 miles of a charger, 96% within 25 miles

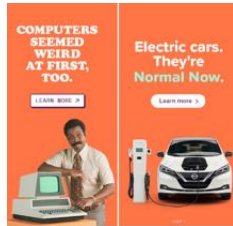
## More than 35% of stations are in low-income and disadvantaged communities (LIC/DAC)

48% Contract executed  
 51% Permit submitted  
 52% In construction  
 52% Construction complete  
 53% Commissioned

## Built more DC fast charging stations per capita in rural than urban areas



# Sponsoring a range of education and awareness activities that help to educate about ZEV technology



## Our Brand Neutral Campaign “Normal Now”

- 333 million impressions (views) in California in 2020
- Awarded “Outstanding Achievement in Internet Advertising” award by the Web Marketing Association
- 35% of all media spend is in low-income and disadvantaged communities



## Sponsoring many other efforts, including Veloz and other prominent organizations

- \$6 million investment and collaboration with community-based organizations to reach diverse, DAC/LIC in CA
- Sponsorship of broad range of events focused on ZEV education and awareness, including Ride and Drives through Plug In America
- *Kicking Gas* campaign starring Arnold Schwarzenegger highlighted the benefits of EVs
- New *40 Million Reasons to Go Electric* campaign

# California Cycle 3 ZEV Investment Plan

1. National outreach efforts
2. Cycle 3 investment plan summary
3. Infrastructure investments
4. Public education, awareness, access and marketing
5. Green City 2

Charger ID 100162-02

 electrify  
america

# National outreach efforts

A year long, multi-pronged outreach effort captured insights from key stakeholders and informed Cycle 3 investments.



Active outreach to academics and industry



Listening sessions with regional government stakeholders and interest groups



Thorough review of website submissions for content and insights



Follow-up with website submitters via one-on-one phone calls and emails





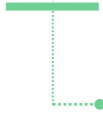
# National outreach efforts

Themes and lessons learned from outreach campaign:

- ⚡ Public ultra-fast charging is critical: California Energy Commission estimates 67,000 public fast chargers needed by 2030
- ⚡ Investment needed to support charging for transit and freight vehicles
- ⚡ Charging is the primary barrier to ride-hail drivers going electric
- ⚡ Disadvantaged and low-income communities benefit from targeted investment



# Cycle 3 investment plan summary

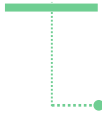


Build ultrafast 150kW - 350kW DC fast chargers across four primary use cases and complement chargers with solar, storage and other energy solutions. We will strive to achieve 35% LIC/DAC investments.

- ⚡ **Metros:** Retail, ride hail, urban delivery, MUD
- ⚡ **Highway** and **regional** routes
- ⚡ **Transit**
- ⚡ **Delivery:** Medium-duty, heavy-duty (California only)



# Infrastructure investments



Further expand access to charging infrastructure in California:



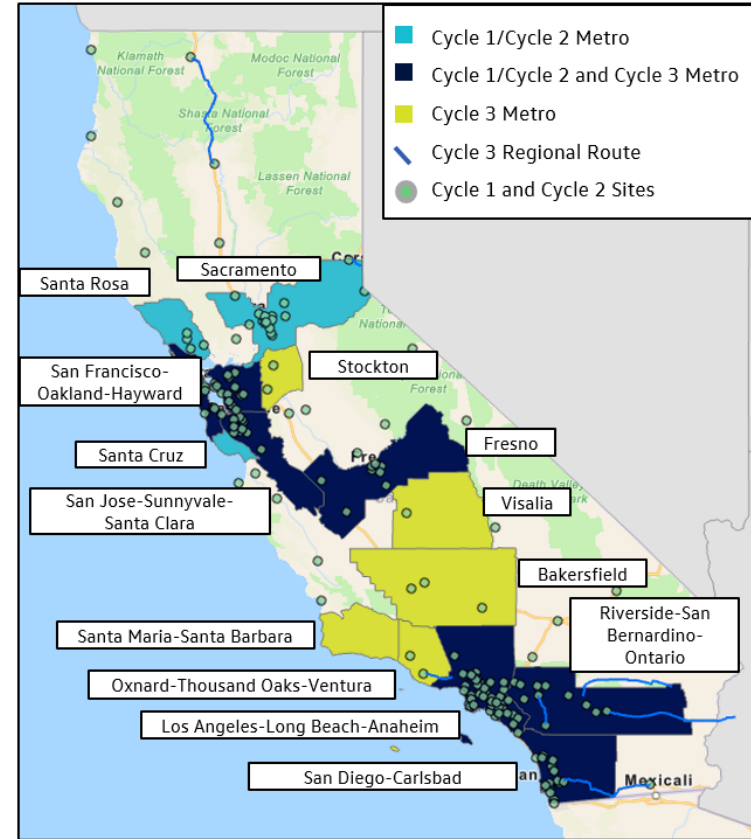
## **New metro area investments:**

Bakersfield  
Oxnard-Thousand Oaks-Ventura  
Santa Maria-Santa Barbara  
Stockton  
Visalia

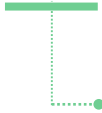


## **Expansion of existing metro area investments:**

Fresno  
Los Angeles-Long Beach-Anaheim  
Riverside-San Bernardino-Ontario  
San Diego-Carlsbad  
San Francisco-Oakland-Hayward  
San Jose-Sunnyvale-Santa Clara



# Infrastructure investments



Investing \$6-10MM in transit, medium- and heavy-duty fleet charging to expand transportation, electrification and benefits.

**Municipalities and transit agencies across the US are looking to electrify their fleets, but face barriers:**

- ⚡ Limited knowledge of charging technologies and station deployment
- ⚡ Limited funding
- ⚡ Limited expertise in energy / utility management

**Medium- and heavy-duty electrification is a top priority for both stakeholders and regulatory bodies:**

- ⚡ Likely requires dedicated sites due to footprint and safety considerations
- ⚡ Engaged in CharIN effort to develop 1+ MW standard



# Public education, awareness, access and marketing

Boosting ZEV adoption through brand neutral campaigns. Our strategy:

- ⚡ Continue brand neutral messaging, similar to Normal Now campaign
- ⚡ Continue to leverage the great work of others
- ⚡ At least 35% of education and outreach spending will target DAC/LIC



**92%** of EV ride & drive attendees said their impression of EVs is “better” after driving one<sup>1</sup>

**78%** of Americans think finding an EV charging station is at least moderately difficult<sup>2</sup>

**65%** of Americans have not driven or known someone who has driven an all-electric car or truck<sup>3</sup>

Sources:

1 – 2019 Participants from ten Plug In America Ride and Drives sponsored by Electrify America

2 – MacInnis, Bo, and Jon A. Krosnick. 2020. Climate Insights 2020: Electric Vehicles. Washington, DC: Resources for the Future

3 – MacInnis, Bo, and Jon A. Krosnick. 2020. Climate Insights 2020: Electric Vehicles. Washington, DC: Resources for the Future

# Access investments



Provide funding to support taxi and TNC drivers who go electric. Incentivize the purchase and deployment of EVs as taxis and TNC fleet vehicles through a competitive RFP. Benefits include:

- ⚡ Nearly three-times greater emissions savings than electrifying average California vehicle
- ⚡ Support lower costs and higher take-home pay for TNC and taxi drivers, who are often low income
- ⚡ Provide increased visibility for electric vehicles among passengers
- ⚡ In one year in Denver, ~200 electric vehicles provided 300,000 rides



# Green City 2

Projects located in Long Beach and Wilmington communities

- ⚡ \$25 million investment
- ⚡ Focused on freight and transit electric vehicle charging deployment
- ⚡ Freight charging depots will serve operators of all sizes, from large to small/independent
- ⚡ New, innovative technology and business models will be tested and implemented, including smart energy solutions to increase overall energy efficiency and to limit grid impact



# \$200MM to expand charging access in California



## Infrastructure \$127MM

- **Metro: \$70-100MM**
  - Retail
  - Mobility
  - MUD
- **Highway and regional routes: \$15-25MM**
  - Highway
- **New Opportunities: \$6-10MM**
  - Heavy-duty
  - Transit



## Education, Access, and Marketing \$28MM

- **ZEV Adoption: \$14MM**
  - DAC/LIC
  - Ride and drives
  - Events/PR/social
- **Station Utilization: \$12MM**
  - Advertising
  - Web app
  - CRM
  - Events/PR/social
- **TNC Electrification: \$2MM**
  - TNC



## Green City 2 \$25MM

- **Charging Deployment: \$25MM**
  - Heavy Duty
  - Transit



## Cycle 3 timeline and next steps

We hope to invest as quickly as possible to help accelerate transportation electrification in California.

- ⚡ Real estate acquisition (July 2021)
- ⚡ Site design and development (starting September 2021)
- ⚡ Cycle 3 officially begins (Q1 2022)
- ⚡ First Cycle 3 sites live (Q2 2022)



# Thank You

electricity  
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