

ELECTRIC UTILITY FILING BI-ANNUAL UPDATE

**U.S. investor-owned utility activity on transportation electrification
for the first half of 2021**

By Nicole Lepre

November 2021

 **ATLAS**
PUBLIC POLICY
WASHINGTON, DC USA

Table of Contents

Executive Summary.....	3
Transportation Electrification State of Play	4
Summary of Filing Activity through H1 2021	6
Utility Transportation Electrification Programs by EIA Region	13
West Coast.....	14
Central Atlantic	16
Lower Atlantic	17
Midwest	18
Rocky Mountain.....	19
Conclusion	21
References	22

Executive Summary

While activity surrounding potentially transformative federal infrastructure and social program bills have rightfully stolen much of the spotlight lately, states, investor-owned utilities (IOUs), and the private market also made significant contributions to transportation electrification activity. At more than 298,000, U.S. electric vehicle (EV) sales during the first half of the year grew by nearly 140 percent compared to the first half of 2020, and the second quarter of 2021 had the highest quarterly EV sales to date. In Q2, EVs made up nearly four percent of all light duty vehicle sales. Global private sector investment during the first half of the year also surpassed the first half of 2020, with \$77 billion of investments announced, representing an increase of about 22 percent from the first half of 2020. The number of charging ports in the United States also grew considerably during the first half of the year. More than twice as many charging points were added from January to June as were added during the same period in 2020. This growth brings the total through the end of June 2021 to 112,000 Level 2 and fast charging ports.

Investment in transportation electrification from Investor-owned utilities (IOUs) also grew substantially during the first half of 2021 compared to 2020. State commissions approved more than \$460 million in transportation electrification programs that could support more than 1,700 DC fast chargers and almost 73,000 Level 2 ports. This is significantly more than the \$60 million approved during the first half of 2020. The first half of 2021 also saw nearly \$665 million¹ of proposed investment, a major increase from the \$158 million proposed during the first half of 2020. Notably, the average size of approved programs by dollar amount has also increased in 2020 and 2021, suggesting that utilities are moving away from “pilots” and toward full-scale programs. Through the end of June 2021, approved IOU investments come to nearly \$3.1 billion and could support more than 6,200 DC fast chargers and nearly 224,000 Level 2 ports. The two largest approvals during the first half of the year were from New Jersey’s Public Service Electric and Gas Company’s (PSEG) \$205 million Clean Energy Future Program and Xcel Energy Colorado’s \$110 million 2021-2023 Transportation Electrification Plan. These programs made the Central Atlantic region and the Rocky Mountain region the first and second highest U.S. Energy Information Administration (EIA) regions for approved IOU investment in transportation electrification.

Acknowledgement: This work was supported by the Natural Resources Defense Council

¹ This includes about \$488 million of proposed programs from Pacific Gas & Electric and Southern California Edison that would be funded by revenue from the Low Carbon Fuel Standard (LCFS) program, as opposed to electric ratepayer revenue. San Diego Gas & Electric proposed an LCFS revenue-funded program as well, however they did not release a budget.

This report elaborates on the trends in IOU transportation electrification programs during the first half of 2021 (H1 2021). Using data from the Atlas EV Hub (www.atlasevhub.com), the report summarizes utility EV investment activity during the first half of 2021 and places that investment in a broader context. All data from this report is from the Electric Utility Filings dashboard on the EV Hub unless otherwise noted.

Transportation Electrification State of Play

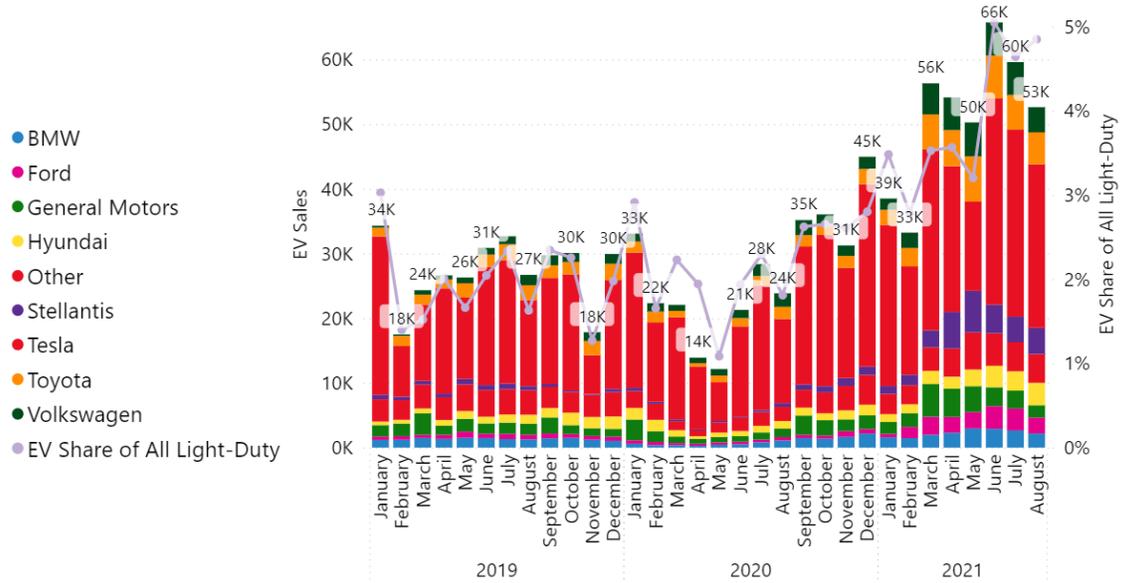
EV sales, (including fully-electric battery electric vehicles, “BEVs,” and plug-in hybrid EVs, “PHEVs”), in the United States reached more than 298,000 during the first half of 2021, representing enormous growth of nearly 140 percent compared to the first half of 2020. Of these sales, 70 percent were BEVs. Nearly 66,000 EVs were sold in June, making it a record month by more than 10,000 sales compared to any other month to that point. In fact, monthly sales from March 2021 through June 2021 were the top four highest on record to that point, making Q2 2021 EV sales the highest quarter to date. Q2 EV sales reached nearly four percent of light-duty vehicle sales. Tesla continues to dominate, however its share of EV sales decreased to 46 percent during the first half of 2021, compared to 63 percent during the first half of 2020.

The first half of 2021 also saw substantial investment announcements in transportation electrification from the private sector, with \$77 billion announced globally. This represents an increase of about 22 percent from the \$63 billion announced during the first half of 2020. General Motors (GM) and Ford each accounted for about 20 percent of that total. GM’s announcements included an increase in its electric and autonomous vehicle investments from 2020 through 2025 to \$35 billion – up from \$20 billion previously announced [1]. Ford’s announcements included \$8 billion of new investment in EVs and plans to make an all-electric version of its Explorer and Lincoln Aviator sport utility vehicles [2].

As of June 2021, there were more than 112,000 charging ports, including Level 2 and DC fast chargers, across the United States [3]. For some reference, a study conducted by Atlas in April 2021 found that we need 495,000 new public and workplace charging ports by 2030 in order to achieve 100 percent passenger EV sales by 2035 [4]. More than 30,000 charging ports were installed during the first half of 2021, more than double the number added during the first half of 2020. DC fast charging made up 10 percent of the approximately 30,000 ports. Overall, through the first half of 2021, about 62 percent of all DC fast charging ports installed were part of Tesla’s (currently) closed network. However, only

about 40 percent of DC fast charging ports installed during the first half of 2021 were part of the Tesla network, indicating other networks like Electrify America are catching up.

Figure 1: EV Sales and EV Market Share Over Time



This figure shows EV sales and EV market share over time by automaker.

Source: [5]

On the state policy front, Virginia and Colorado had a notable amount of policy activity during the first half of 2021. In March, Virginia enacted five pieces of legislation advancing EVs in the state, including HB1979, which provides EV rebates; HB2118, which provides incentives for electric school buses; HB1965, by which the state adopted California’s ZEV standards; HB2282, which authorizes utility investment in EVs; and SB1223, which establishes a statewide EV charging strategy. In June, Colorado enacted several significant pieces of legislation advancing EVs, including SB21-260, which provides new sources of dedicated funding for transportation electrification; HB21-1266, which establishes an Environmental Justice Action Task Force; SB21-230, which provides funding for EV charging for state fleet vehicles; and HB21-1141, which creates EV license plates.

The first half of 2021 saw more federal activity in transportation electrification than ever, as major infrastructure and social program bills with historical levels of funding for EVs began to be debated in Congress. The bipartisan Infrastructure Investment and Jobs Act (H.R. 3684) passed the Senate in August and on November 5, 2021, was passed by the House. The bill includes \$30.7 billion of funding eligible for EV investments, including \$7.7 billion

dedicated to EV investments [6]. As of early November, the time this report was written, the second bill, a larger spending package that would be passed through the budget reconciliation process, is still being debated and revised but a version passed out of House Committees in late October 2021 would include more than \$23 billion² dedicated to EV investments and an additional \$98 billion eligible for EVs [7]. The passage of these bills would be monumental. For context, to date, there has been less than \$5 billion in public funding for EVs,³ Electrify America's entire Volkswagen Settlement-mandated investment is \$2 billion, and \$3.1 billion of IOU investment has been approved to-date.

Summary of Filing Activity through H1 2021

During the first half of 2021, IOUs were approved to invest more than \$460 million in transportation electrification programs that could support more than 1,700 DC fast chargers and almost 73,000 Level 2 ports. This is significantly more than the \$60 million approved during the first half of 2020. The first half of 2021 also saw nearly \$665 million⁴ of proposed investment, a major increase from the \$158 million proposed during the first half of 2020. Figure 2 below summarizes investor-owned utility activity during the first half of 2021 and Figure 3 shows where this activity occurred, with the size of the circles corresponding to the investment amount.

From 2012 through the first half of 2021, IOUs have been approved to invest nearly \$3.1 billion in transportation electrification programs, which could support more than 6,500 DC fast chargers and nearly 230,000 Level 2 ports. Proposed programs that are pending a commission decision could add another nearly \$2.1 billion of transportation electrification investment and support an additional 2,500 DC fast chargers and nearly 212,000 Level 2 ports. Figure 4 below summarizes IOU investment activity in transportation electrification from 2012 through the first half of 2021.

² This does not include tax credits. The Joint Committee on Taxation estimates tax credits to be worth \$106 billion. These estimates were published on September 13, 2021 and so may not reflect updates to the scope of the credits in the bill [8].

³ This does not include federal vehicle and charging tax credits.

⁴ This includes about \$488 million of proposed programs from Pacific Gas & Electric and Southern California Edison that would be funded by revenue from the Low Carbon Fuel Standard (LCFS) program, as opposed to electric ratepayer revenue. San Diego Gas & Electric proposed an LCFS revenue-funded program as well, however they did not release a budget.

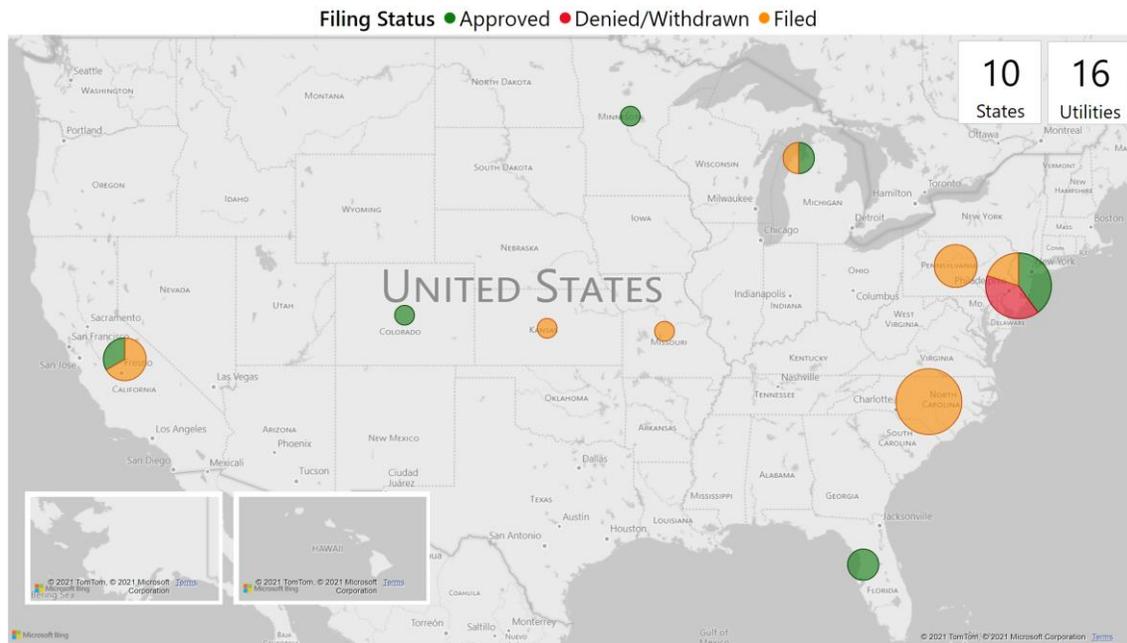
Electric Utility Filing Bi-Annual Update

Figure 2: Electric Utility Filings by Status Between January and June 2021

Approved	Pending/Filed	Denied/Withdrawn
6	7	1
States	States	States
8	14	2
Filings	Filings	Filings
8	9	2
Utilities	Utilities	Utilities
\$462,803,270	\$664,996,880	\$58,871,000
Investment	Investment	Investment
1,732	1,405	0
DC Fast Charging Stations	DC Fast Charging Stations	DC Fast Charging Stations
72,669	33,933	0
Level 2 Charging Stations	Level 2 Charging Stations	Level 2 Charging Stations

This chart highlights approved, pending, and denied filings during the first half of 2021. There was significantly more approved investment during the first half of 2021 compared to the \$60 million approved during the first half of 2020. There was also significantly more proposed investment during the first half of 2021 compared to the \$158 million proposed during the first half of 2020.

Figure 3: Filing Activity by State Between January and June 2021



This map shows the status of different filing actions during the first half of 2021 by state. The size of the circles corresponds to the investment amount. The two largest approvals during the first half of the year were from New Jersey’s PSEG’s \$205 million Clean Energy Future Program and Xcel Energy Colorado’s \$110 million 2021-2023 Transportation Electrification Plan.

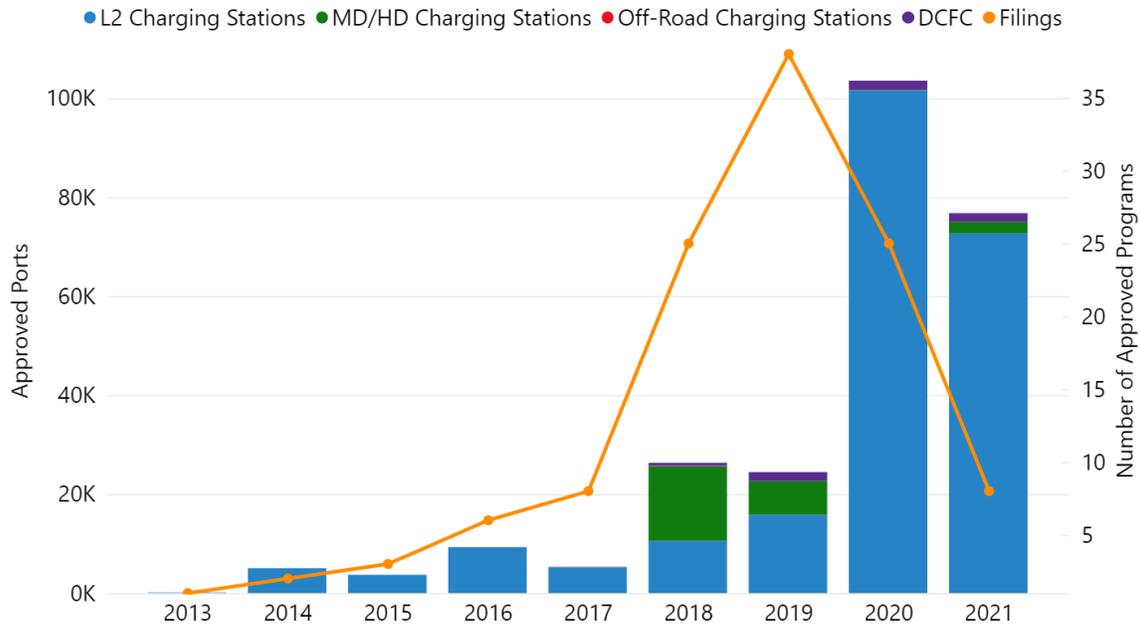
Figure 4: Electric Utility Filings by Status Between 2012 and June 2021

Approved	Pending/Filed	Denied/Withdrawn
32 States	22 States	21 States
111 Filings	56 Filings	38 Filings
51 Utilities	33 Utilities	26 Utilities
\$3,076,300,118 Investment	\$2,093,601,953 Investment	\$537,866,476 Investment
6,257 DC Fast Charging Stations	2,558 DC Fast Charging Stations	504 DC Fast Charging Stations
223,858 Level 2 Charging Stations	212,148 Level 2 Charging Stations	86,143 Level 2 Charging Stations

This chart summarizes approved, pending, and denied filings through June 2021.

Utility activity has increased since 2012 by a variety of metrics. Annual totals of approved utility-supported charging stations have increased from below 10,000 each year from 2013 through 2017 to more than 100,000 in 2020 and almost 80,000 during just the first half of 2021. Figure 5 shows the number of charging ports, by charger type, that could be supported by approved programs each year from 2013 through the first half of 2021 as well as the number of approved programs each year. The figure shows an increase in number of approved ports in 2020 and 2021 despite a decrease in number of approved programs, indicating that program size is increasing. In addition, the average size of approved programs by dollar amount has increased significantly in 2020 and 2021, suggesting that utilities are moving away from “pilots” and toward full-scale programs. Figure 6 shows the average size of approved programs for each year from 2013 through the first half of 2021 as well as the number of programs approved each year. The increase in average approved program size despite a decrease in 2020 and 2021 in number of approved programs further illustrates the growth in program size.

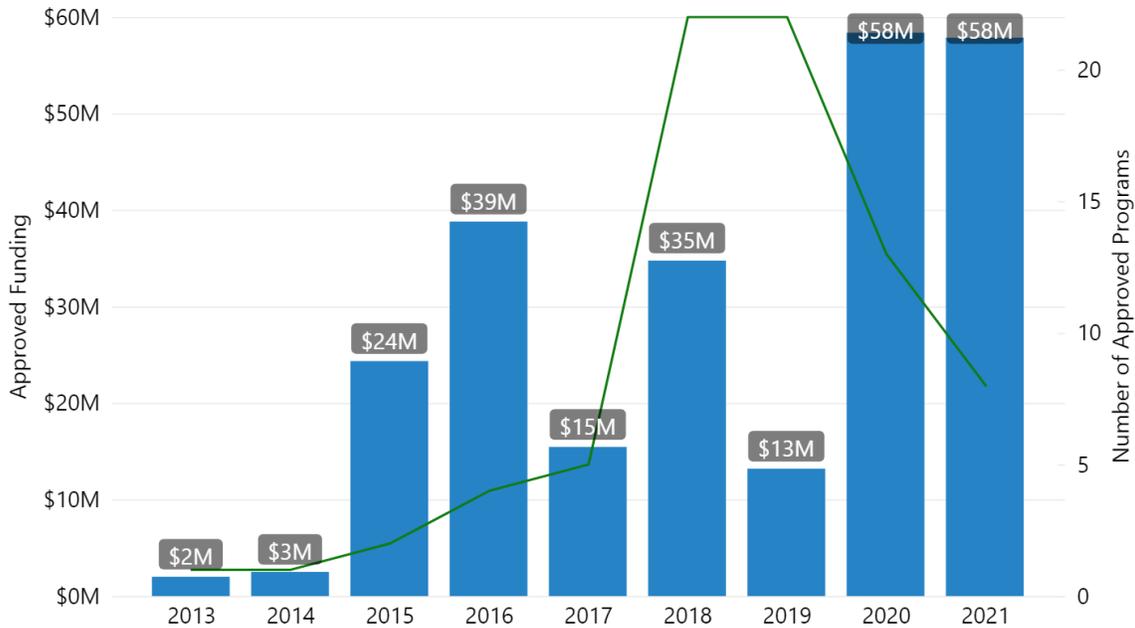
Figure 5: Total Approved Charging Ports, by Charger Type, and Number of Approved Programs from 2013 through H1 2021



This chart shows the number of charging ports, by charger type, that could be supported by approved programs each year since 2013 through the first half of 2021. The chart also shows the number of approved programs each year. The increase in number of approved ports in 2020 and 2021 despite a decrease in number of approved programs shows that program size is increasing as utilities move away from pilot-type programs and toward full-scale programs. Notably, 2021 is on track to have the greatest number of approved charging ports yet.

California and New York account for nearly three quarters of approved investment, with 50 percent and 23 percent respectively of all approved investment through June 2021. California was an early leader in utility investment in EVs and, over the past several years, utilities in other states have followed California’s lead. During the first half of 2021, the largest approved utility investments came from New Jersey, Colorado, and Florida, with California claiming fourth place. California’s share of approved investment through June 2021 was about 50 percent, down from about 88 percent at the end of both June 2017 and June 2018 and about 71 percent at the end of June 2020.

Figure 6: Average Size and Number of Approved IOU Programs by Year through H1 2021



This figure shows the average size (in approved investment amount) of approved programs each year from 2013 through the first half of 2021 as well as the number of programs approved each year. While the number of approved programs decreased in 2020 and 2021 compared to the two years prior, the large increases in average program size in 2020 and 2021 suggest that IOUs are moving away from “pilots” and toward full-scale programs. These averages exclude approved programs that do not have any associated funding (e.g., EV rate programs that do not include a budget).

Atlas recently added a metric to its utility filing database to facilitate a more “apples-to-apples” comparison of programs of varying numbers of years and for varying numbers of utility customers. The metric uses the number of years over which approved funding will be spent and the number of customers in an IOU’s service territory to calculate approved funding per customer per year. Colorado, California, and New York lead have the top five programs with the most approved funding per customer per year. Table 1 shows the top 20 approved programs with the highest per customer per year investment.

Table 1: Top 20 Approved IOU Programs by Funding Per Customer Per Year (includes programs approved from 2021 through June 2021)

Rank	IOU	State	Investment (\$,000)	Program Length (years)	Customers	Investment per customer per year
1	Liberty Utilities	CA	\$4,687	2	48,770	\$48.05
2	Liberty Utilities	CA	\$6,618	5	48,770	\$27.14
3	Xcel Energy	CO	\$110,170	3	1,499,395	\$24.49
4	Southern California Edison	CA	\$436,344	4	5,139,292	\$21.23
5	Central Hudson Gas & Electric Corporation	NY	\$26,003	5	309,263	\$16.82
6	Public Service Electric and Gas Company	NJ	\$205,200	6	2,285,737	\$14.96
7	San Diego Gas & Electric	CA	\$109,100	5	1,464,572	\$14.90
8	Rochester Gas and Electric Corporation	NY	\$39,526	7	383,541	\$14.72
9	Southern California Edison	CA	\$372,425	5	5,139,292	\$14.49
10	Orange and Rockland Utilities	NY	\$23,692	7	235,635	\$14.36
11	New York State Electric & Gas Corporation	NY	\$78,417	7	902,595	\$12.41
12	National Grid	NY	\$142,995	7	1,686,884	\$12.11
13	Consolidated Edison Company	NY	\$290,361	7	3,518,923	\$11.79
14	San Diego Gas & Electric	CA	\$44,416	3	1,464,572	\$10.11

Electric Utility Filing Bi-Annual Update

Rank	IOU	State	Investment (\$,000)	Program Length (years)	Customers	Investment per customer per year
15	Pacific Gas & Electric Company	CA	\$266,813	5	5,524,077	\$9.66
16	Duke Energy	FL	\$62,900	4	1,832,871	\$8.58
17	Minnesota Power	MN	\$3,752	3	147,340	\$8.49
18	Pacific Gas & Electric Company	CA	\$139,120	3	5,524,077	\$8.39
19	National Grid	RI	\$11,175	3	499,126	\$7.46
20	Atlantic City Electric	NJ	\$20,665	5	558,559	\$7.40

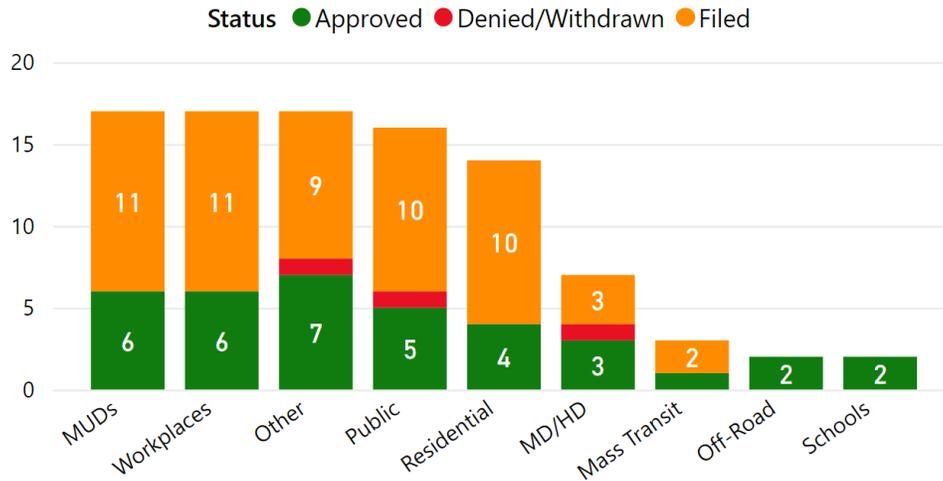
This table shows the top 20 approved IOU programs with the highest approved investment per customer per year. This table includes programs approved through June 2021.

Since 2012, about 16 percent of approved or proposed funding has been dedicated to underserved communities. During the first half of 2021, this number was less than half that with about six percent of the \$764 million approved or proposed for EV programs dedicated to investments in underserved communities. Some utility programs do not dedicate specific funds to underserved communities but prioritize underserved communities in other ways such as by including benefits to these communities in the selection process for projects. During the first half of 2021, 12 out of 22 proposed or approved programs included some type of focus on providing benefits to underserved communities.

Workplaces and multi-unit dwellings (MUDs) saw the greatest number of proposed and approved programs during the first half of 2021 with 11 programs targeting each use case. Programs aimed at providing chargers for public spaces and for residences were the second and third most common program types during the first half of the year. Despite the focus on workplaces and MUDs during the first half of 2021, overall since 2012, programs targeting public chargers have been the most common. Figure 7 below shows the number of program elements⁵ targeting each type of charging use, by status.

⁵ Atlas tracks utility programs at the “program element” level. For example, a program that includes a budget for public DC fast charging and a budget for workplace and MUD Level 2 charging would be broken into two program elements, one for public DC fast charging and one for workplace and MUD Level 2 charging.

Figure 7: Filings by Status and Type During H1 2021

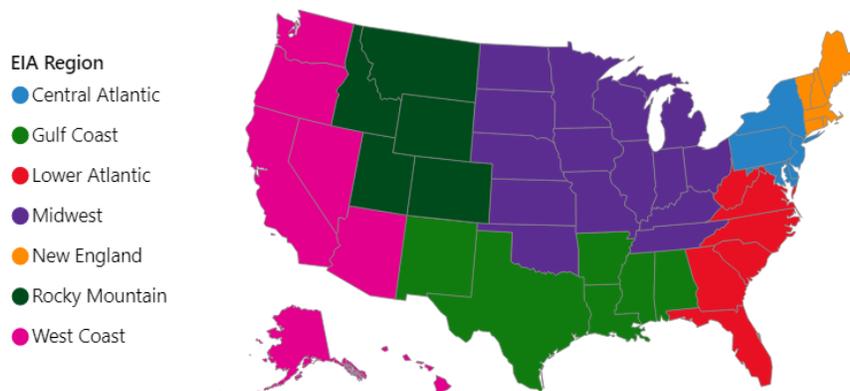


This figure shows the number of program elements⁵ targeting each type of charging use, by status during H1 2021.

Utility Transportation Electrification Programs by EIA Region

This section provides an overview of filing activity in each region as defined by the U.S. Energy Information Administration (EIA). Figure 8 displays states divided by their respective EIA regions.

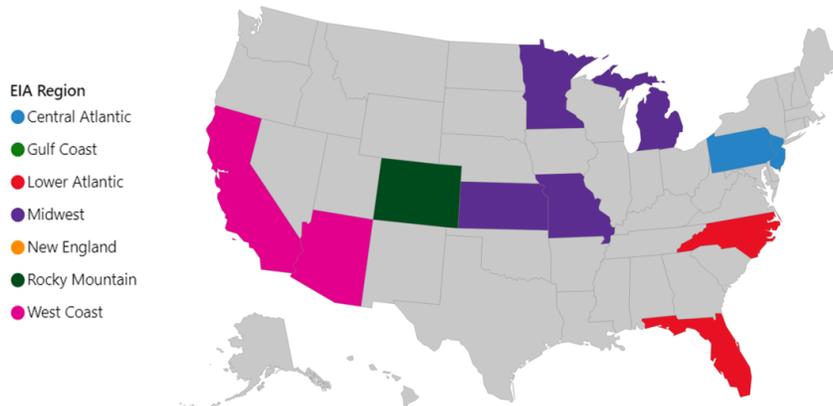
Figure 8: U.S. States by EIA Region



This figure shows states categorized by U.S. EIA region.

The Central Atlantic Region led in approved utility investment during the first half of 2021, with more than \$225 million approved, more than twice as much as the Rocky Mountain region, which came in second. More than 90 percent of the approved investment in the Central Atlantic Region came from New Jersey’s PSEG’s \$205 million Clean Energy Future Program. All of the approved funding in the Rocky Mountain region was from Xcel Energy Colorado’s \$110 million 2021-2023 Transportation Electrification Plan. The West Coast led in terms of proposed investment, with more than \$123 million proposed. Notably, this proposed investment was from a Pacific Gas & Electric program, which is unique in that it would be funded by revenue generated through the Low Carbon Fuel Standard (LCFS) program, as opposed to electric ratepayers. The Midwest was second in terms of proposed investment, with a total of about \$65 million proposed from Consumers Energy in Michigan, Evergy in Kansas, and Evergy in Missouri. Figure 9 shows the states where utility programs were approved, filed, rejected, or withdrawn during the first half of 2021.

Figure 9: H1 2021 Utility filing actions by EIA region



This map displays filing actions by EIA region across the country during the first half of 2021. There was no recorded activity in New England or the Gulf Coast.

West Coast

During the first half of 2021, the most significant filing activities in the West Coast, by total investment, were a more than \$360 million proposal for Southern California Edison (SCE) and a nearly \$124 million proposal from Pacific Gas & Electric Company (PG&E). Both proposals are unique compared to the other programs discussed in this report in that the funds would come from revenue generated by California’s Low Carbon Fuel Standard (LCFS) program rather than from electric ratepayers. Highlights of the PG&E program include more than \$86 million for \$1,000 pre-owned vehicle rebates (\$4,000 for income-

qualified customers) and more than \$25 million to install roughly 2,000 Level 1 or Level 2 charging ports at MUDs and small businesses. The SCE program also includes \$1,000 pre-owned vehicle rebates (\$4,000 for income-qualified customers). Other highlights from the SCE program include incentives to help Transportation Network Company (TNC) drivers rent EVs, rebates for electric drayage trucks, and a financing program for electric buses. SDG&E also submitted a plan for LCFS-funded transportation electrification programs, including a pre-owned EV rebate program, however the plan did not include a budget.

The first half of the year also saw a major approval from San Diego Gas & Electric (SDG&E), with the \$43.5 million Power Your Drive extension program. Under the program, SDG&E will provide the customer-side make-ready infrastructure to support Level 2 chargers at MUDs and workplaces and rebates to offset the costs of the charging equipment. The program could support 1,000 Level 2 ports at MUDs and 1,000 Level 2 ports at workplaces.

Both the PG&E and SDG&E programs include additional support or carve-outs for underserved communities. Specifically, the pre-owned vehicle rebates in PG&E’s program are higher for income-qualified customers and in SDG&E’s Power Your Drive program, the utility targets installing 50 percent of the MUD and workplace chargers in underserved communities. Additionally, SDG&E will own and operate the charging stations at MUDs in underserved communities, a move Southern California Edison also made in its Charge Ready 2 program, which was approved back in 2020. Since a major barrier to installing EV charging installations at MUDs is the complex and time-consuming development process, offering turn-key solutions can help get these projects built. Both utilities describe these barriers in their filings to justify for owning and operating chargers in MUDs in underserved communities.

Beyond California, Arizona’s two IOUs filed the second phase of their transportation electrification plans. The plans set goals to reach more than one million passenger EVs across both utility territories by 2030 including 450,000 EVs in Arizona Public Service Company’s service territory and 95,000 EVs in Tucson Electric Power’s service territory. It also includes goals to increase medium- and heavy-duty EV deployment and target underserved communities.

Table 2: West Coast Filings by Status in H1 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
Southern California Edison	CA	Advice 4518-E	6/15/2021	Filed	\$363,840,000

Electric Utility Filing Bi-Annual Update

Utility	State	Filing Identifier	Date	Status	Potential Investment
Pacific Gas & Electric Company	CA	Advice 6226-E	6/15/2021	Filed	\$123,960,000
San Diego Gas & Electric	CA	A1910012	4/19/2021	Approved	\$44,416,170
San Diego Gas & Electric	CA	Advice 3785-E	6/15/2021	Filed	Not Specified
Arizona Public Service Company	AZ	RU-00000A-18-0284	4/1/2021	Filed	No Costs Allocated
Tucson Electric Power	AZ	RU-00000A-18-0284	4/1/2021	Filed	No Costs Allocated

This table shows all filing activity in the West Coast region during the first half of 2021.

Central Atlantic

During the first half of 2021, the Central Atlantic region saw the greatest amount of IOU investment in transportation electrification approved across all EIA regions. PSEG had the largest approval in the region as well as nationwide, with \$205 million approved out of the \$364 million initially proposed for their Clean Energy Future program. The approved program elements include utility-side and customer-side make-ready support as well as support for charging equipment for potentially 43,500 Level 2 and 1,200 DC fast charging ports in the state. There was \$45 million in the original proposal for electric school buses and other medium- and heavy-duty electrification projects that was not approved, however there was no discussion in the decision of why these investments were not approved.

Table 3: Central Atlantic Filings by Status in H1 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
Public Service Electric and Gas Company	NJ	EO18101111	1/27/2021	Approved	\$205,200,000
Jersey Central Power & Light	NJ	EO21030630	3/1/2021	Filed	\$49,924,000
Public Service Electric and Gas Company	NJ	EO18101111	1/27/2021	Denied/ Withdrawn	\$44,800,000
Atlantic City Electric	NJ	EO18020190	2/17/2021	Approved	\$20,665,000
Atlantic City Electric	NJ	EO18020190	2/17/2021	Denied/ Withdrawn	\$14,071,000
Duquesne Light Company	PA	R-2021-3024750	4/16/2021	Filed	\$4,318,130
PECO Energy Company	PA	R-2021-3024601	3/30/2021	Filed	\$1,625,000
UGI Utilities	PA	R-2021-3023618	2/9/2021	Filed	\$0

This table shows all filing activity in the Central Atlantic region during the first half of 2021. The region led in terms of approved investment and Public Service Electric and Gas Company had the largest approved program across all EIA regions.

Lower Atlantic

The Lower Atlantic was the third most active region in terms of approved and filed programs during the first half of 2021 and saw \$65.2 million of IOU investment approved and almost \$56 million proposed. Notably, Duke Energy Florida's approved \$62.9 million program includes utility-owned DC fast chargers at 100 sites, making it the largest approval for utility-owned charging infrastructure to date. Duke's program also includes rebates to support DC fast chargers and Level 2 chargers for a variety of customer types including the public, MUDs, workplaces, fleets, schools, transit vehicles, and off-road vehicles like

forklifts and eTRUs. The Florida Public Service Commission approved another utility-ownership program, albeit a much smaller program, for Tampa Electric to own and operate up to 200 Level 2 ports and eight DC fast chargers.

Duke Energy’s North Carolina utilities were active during the first half of 2021 and both Duke Energy Progress (DEP) and Duke Energy Carolinas (DEC) proposed Phase II of their active Electric Transportation Pilot Programs. The Phase II programs propose to install utility-owned Level 2 chargers for public and multi-family sites and utility-owned DC fast chargers along corridors. Combined, the DEP and DEC programs could support almost 1,000 Level 2 ports and 180 DC fast chargers, if approved. Both utilities also proposed a make-ready credit program for residential and non-residential customers that would offset costs based on Duke’s expected increase in revenue due to charging station use.

Table 4: Lower Atlantic Filings by Status in H1 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
Duke Energy	FL	20210016-EI	6/4/2021	Approved	\$62,900,000
Duke Energy	NC	E-2, Sub 1197	5/24/2021	Filed	\$55,956,250
Tampa Electric	FL	20200220-EI	4/1/2021	Approved	\$2,300,000

This table shows all filing activity in the Lower Atlantic region for the first half of 2021.

Midwest

The Midwest was the least active EIA region (with the exception of New England and the Gulf Coast, which had no activity) in terms of overall investment approved, with two relatively small programs approved for DTE Energy Company (DTE) and Minnesota Power. The DTE program is phase 2 of the utility’s Charging Forward program and includes \$13.4 million in charging infrastructure and educational services for commercial and industrial fleets. The program includes 534 Level 2 ports and 100 DC fast charging ports for these fleet vehicles. The other approved program was a \$3.7 million rebate program to help residential customers install Level 2 chargers. Rebates of up to \$1,000 will be offered, potentially supporting almost 300 chargers. Participating customers must install smart chargers and take service on a time-of-use rate.

In terms of only proposed investment, the Midwest was the second most active, with three sizeable programs proposed. The largest proposed program in the region was Consumer Energy’s proposed extension of the PowerMIDrive and PowerMIFleet programs. The programs could provide more than \$33 million of investment to support more than 2,000 Level 2 ports and more than 180 DC fast chargers across use cases including residential, multi-unit dwellings, the public, and fleets. Notably, the fleet program has a strong focus on providing benefits to underserved communities, with three programs adding up to more than \$1.5 million dedicated to these communities.

Table 5: Midwest Filings by Status in H1 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
Consumers Energy	MI	U-20963	3/1/2021	Filed	\$33,036,000
Evergy	KS	21-EKME-320-TAR	2/24/2021	Filed	\$19,650,000
DTE Energy Company	MI	U-20935	3/19/2021	Approved	\$13,400,000
Evergy	MO	ET-2021-0151	2/24/2021	Filed	\$12,687,500
Minnesota Power	MN	20-638	4/21/2021	Approved	\$3,752,100

This table shows all filing activity in the Midwest region in the first half of 2021. Michigan led the region in terms of proposed or approved utility support for transportation electrification.

Rocky Mountain

There was only one approved IOU EV program in the Rocky Mountain region, however it was the second largest approved program across EIA regions, second only to PSEG’s \$205 million approved program. The program was Xcel Energy’s transportation electrification plan, as required by SB 19-077, and it provides \$110 million over three years and could support more than 20,000 Level 2 ports and about 24 DC fast charging stations. Notably, the Colorado Public Utilities Commission increased the focus on equity in their approval, establishing a minimum carve-out for underserved communities of 15 percent of the budget across the program.

Table 6: rocky mountain filings by status in H1 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
Xcel Energy	Colorado	20A-0204E	1/11/2021	Approved	\$110,170,000

The only filing activity in the Rocky Mountain Region during the first half of 2021 was from Xcel Energy. The \$110 million program was the second largest approved program across EIA regions, second only to Public Service Electric and Gas Company's \$205 million approved program.

Box 1. New England

There was no IOU activity in New England during the first half of 2021. However, in July, three Massachusetts utilities, National Grid and Eversource both proposed substantial EV programs. Unitil also proposed a program, however it was significantly smaller in scale than the other two proposed programs. The three utilities coordinated on the program proposals and therefore the programs are similarly structured, and combined, could support almost 550 DC fast chargers and more than 53,000 Level 2 ports for public, workplace, residential, and fleet chargers. These programs will be discussed further in the next bi-annual report, which will cover the second half of 2021.

Table 7: New England Filings by Status in July 2021

Utility	State	Filing Identifier	Date	Status	Potential Investment
National Grid	MA	21-91	7/14/2021	Filed	\$276,690,000
Eversource	MA	21-90	7/14/2021	Filed	\$191,809,600
Unitil	MA	21-92	7/14/2021	Filed	\$988,000

Box 2. Gulf Coast

There was no new filing activity recorded during the first half of 2021 in the Gulf Coast region and the region continues to have the least recorded utility activity of all regions with only three programs and a total of \$11.6 million filed.

Table 8: All-Time Gulf Coast Filings by Status

Utility	State	Filing Identifier	Date	Status	Potential Investment
CenterPoint Energy	TX	49421	3/09/2020	Approved	No costs allocated
PNM	NM	20-00237-UT	12/21/2020	Filed	\$8,438,000
Xcel Energy	NM	20-00150-UT	7/21/2020	Filed	\$3,169,000

Conclusion

IOUs continue to increase their support for transportation electrification, with the first half of 2021 exceeding the first half of 2020 substantially in terms of both approved and proposed investment, bringing the total approved investment to almost \$3.1 billion. Much more is needed in order to reach transportation electrification targets necessary to combat climate change. A recent study by Atlas found that 495,000 new public and workplace charging ports, an investment of more than \$87 billion, would be needed in order to achieve 100 percent passenger EV sales by 2035 [4]. The remainder of 2021 will be pivotal for transportation electrification, as the country moves to implement the EV funding in the bipartisan infrastructure bill and waits to learn the fate of the tens of billions of dollars of additional EV-eligible funding in the reconciliation bill.

References

- [1] GM Corporate Newsroom, "GM Will Boost EV and AV Investments to \$35 Billion Through 2025," 16 June 2021. [Online]. Available: <https://media.gm.com/media/us/en/gm/home.detail.html/content/Pages/news/us/en/2021/jun/0616-gm.html>.
- [2] TheVerge.com, "Ford is making an electric Explorer, boosts EV investment by \$8 billion," 26 May 2021. [Online]. Available: <https://www.theverge.com/2021/5/26/22454728/ford-plus-pro-electric-explorer-suv-investment>.
- [3] Atlas EV Hub, "EV Charging Deployment," [Online]. Available: <https://www.atlasevhub.com/materials/ev-charging-deployment/>. [Accessed 26 October 2021].
- [4] Atlas EV Hub, "U.S. Passenger Vehicle Electrification Infrastructure Assessment," 25 April 2021. [Online]. Available: <https://atlaspolicy.com/u-s-passenger-vehicle-electrification-infrastructure-assessment/>.
- [5] Atlas Public Policy, "Automakers Dashboard," [Online]. Available: <https://www.atlasevhub.com/materials/automakers-dashboard/>. [Accessed 27 October 2021].
- [6] Atlas EV Hub, "Infrastructure Investment and Jobs Act (H.R. 3684)," [Online]. Available: <https://www.atlasevhub.com/materials/invest-in-america-act-h-r-3684/>. [Accessed 26 October 2021].
- [7] Atlas EV Hub, "The Reconciliation Bill (H.R. 5376): More than \$34 Billion Dedicated for EVs," [Online]. Available: <https://www.atlasevhub.com/materials/the-reconciliation-bill-more-than-34-billion-dedicated-for-evs/>. [Accessed 26 October 2021].
- [8] The Joint Committee on Taxation, "JCX-42-21 (September 13, 2021)," 13 September 2021. [Online]. Available: <https://www.jct.gov/publications/2021/jcx-42-21/>.



ATLAS
PUBLIC POLICY

WWW.ATLSPOLICY.COM