



THE NEXT STEPS WITH FEDERAL EV CHARGING PROGRAMS

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Introduction

To build a nationwide network of EV charging infrastructure, Congress established the five-year, \$5 billion National Electric Vehicle Infrastructure Program (NEVI). State agencies, most of which had never run an EV charging program, made significant progress awarding contracts and getting chargers online. By February of 2025, states had obligated \$526 million (about 40 percent in the last 6 months) and awarded contracts for nearly 4,000 EV charging ports at 990 locations across the country, indicating clear momentum by the states going into 2025. In addition, Congress provided \$2.5 billion for a competitive Charging and Fueling Infrastructure (CFI) program to fill network gaps and ensure communities had access to EV charging. So far, the Department of Transportation has awarded \$1.8 billion to 147 projects across the country.

The federal support for EV charging network deployment has filled geographic gaps, spurred private investment and job creation, and reduced pollution. The new regulations for federally funded chargers set a common set of expectations for convenient and reliable charging nationwide. Figure 1 shows the estimated benefits of the \$7.5 billion charging investment as of September 2025, and if fully realized, the program could have \$4-5 million annual health savings from cleaner air.

Continuing the current NEVI program for future funding is the most efficient way to continue federal EV charging funding. This analysis focuses on the federal contributions to a public EV charging network to support millions of EV drivers through 2035.

Continued federal government investment in EV charging network:

- Invests in states, communities, and domestic jobs
- Fills gaps where private investment will not build chargers
- Utilizes the capacity states have built to deploy infrastructure faster
- Improves public health by lowering local emissions

Figure 1. Federal Charging Investment Benefits of NEVI and CFI

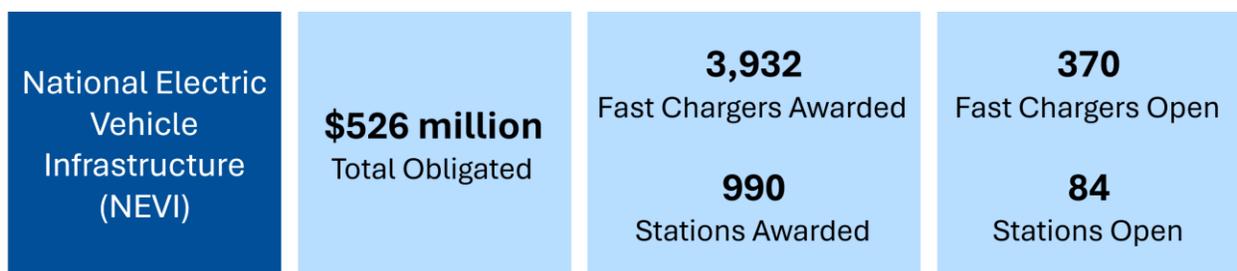


Source: [FHWA](#), [Climate Program Portal](#), [ICCT](#), [Clean Economy Tracker](#), [Atlas EV Hub](#), [ANL AFLEET](#), [EPA Cobra](#)

Federal EV Charging Programs Status

As of February 2025, 48 states obligated funds totaling \$526 million under NEVI. States have so far awarded contracts for nearly 4,000 DC fast charger ports at 990 sites across the country. Already, over 370 NEVI-funded fast chargers are now open and in operation at over 80 locations across the country according to the EV States Clearinghouse (see Figure 2).

Figure 2. Federally Funded Charging Deployment Metrics (as of September 2025)



Source: [EV States Clearinghouse](#), [Climate Program Portal](#), [FHWA](#)

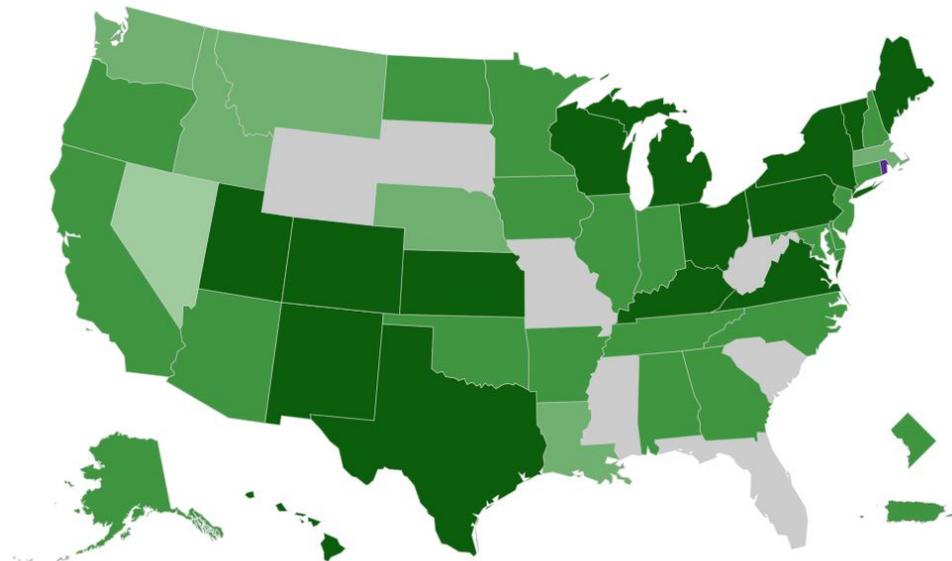
States were making considerable progress before the freeze of the NEVI program from January to June 2025. All 50 states, the District of Columbia, and Puerto Rico developed state plans for EV charging deployment under the program. As of September 2025, 44 states issued one or more solicitations for contractors to install charging stations (Figure 3).

Furthermore, some states have made substantial progress in awarding their available funding. Maine (97%), Hawaii (78%), Pennsylvania (66%), Colorado (66%), Vermont (60%), Kentucky (59%), New Mexico (53%), and Wisconsin (52%) have awarded at least half of their available funds for NEVI and 13 states (Alabama, Arkansas, California, Colorado, Hawaii, Minnesota, Montana, Nevada, Pennsylvania, Texas, Utah, Vermont, and Washington) already have FY26 plans submitted and approved by FHWA as of September 2025.

Based on their obligation rates prior to the freeze, we estimate states would likely have continued to obligate about double the total amount already obligated, or more than \$1 billion, had the freeze not happened.

Figure 3. Progress Towards Implementing NEVI (as of September 2025)

State Status ● FY26 Plan Pending Approval ● FY26 Plan Approved ● Solicitation Issued ● Awards Announced ● Some Stations Operational ● Fully Built Out



Source: [EV States Clearinghouse](#)

The Road Ahead: Key Focus Areas for Federal EV Charging Programs

As the EV market continues to evolve, federal transportation policy must adapt to ensure the nation's charging infrastructure keeps pace with demand.

Funding Estimate to Support Public EV Charging

Since the deployment of NEVI, many reports have estimated the total investment in public charging needed to support the growing EV market. Since the freeze on NEVI from January to June 2025 and the end of the tax credits to support EV deployment, market projections of electric vehicle sales show a slower trajectory than once estimated (see Appendix A for details).

Our analysis, based on recent deployment experience and an updated estimate of investments, is detailed in Appendix A and summarized in Table 1. We estimate that electric utilities and government will provide \$4 to \$32 billion in additional investments in public charging over the next decade to support the EV market through 2035.

Table 1. Estimated EV stock and investment needs for public charging network in 2035

Estimated EV Stock	Estimated # Public Chargers Needed (Level 2)	Estimated # Public Chargers Needed (DC Fast Charging)	Estimated Total Investment	Estimated Government and Utility Investment (20%)
Light Duty Estimate				
50M - 54M	2,850,000 – 3,600,000	350,000 – 430,000	\$52B – \$160B	\$10B – \$32B
Medium-/Heavy-Duty Estimate				
1.2M - 3.5M	N/A	42,000 – 120,000	\$8B – \$35B	\$2B – \$7B
Total Estimate of Chargers and Investment				
	2,850,000 – 3,600,000	590,000 – 4,300,000	\$60B - \$195B	\$12B – \$39B
Less \$7.5B already invested:				\$4B – \$32B

These assumptions attempt to estimate the impacts of rollbacks in policy (greenhouse gas and fuel economy federal vehicle standards for light-duty vehicles and Advanced Clean Truck rule for medium- and heavy-duty vehicles) as well as tax incentives for all sectors. The estimate assumes the Advanced Clean Cars II program is retained in California and the states that follow the program. The 20 percent figure is nearly half the level of public and utility investment in light-duty EV charging to date, according to internal estimates, and reflects an increasingly large role for the private sector.

Additional investment from state and local government and private industry will continue to be spurred by federal government investment. The first \$7.5 billion of federal funding was complemented with almost \$42 billion of announced investments by other public, private, and

utility sectors for light-duty vehicles and medium- and heavy-duty vehicles.¹ Given current and expected market conditions, public charging will need continued support from utilities and the public sector for the next decade, but that share of that funding should decline over time reaching less than half the level of today.

Program Design Considerations for Successful EV Charging Implementation

Based on current staffing constraints and the uncertain executive branch support for EV program implementation, future federal EV charging programs through transportation reauthorization legislation should focus on three principles for successful implementation:

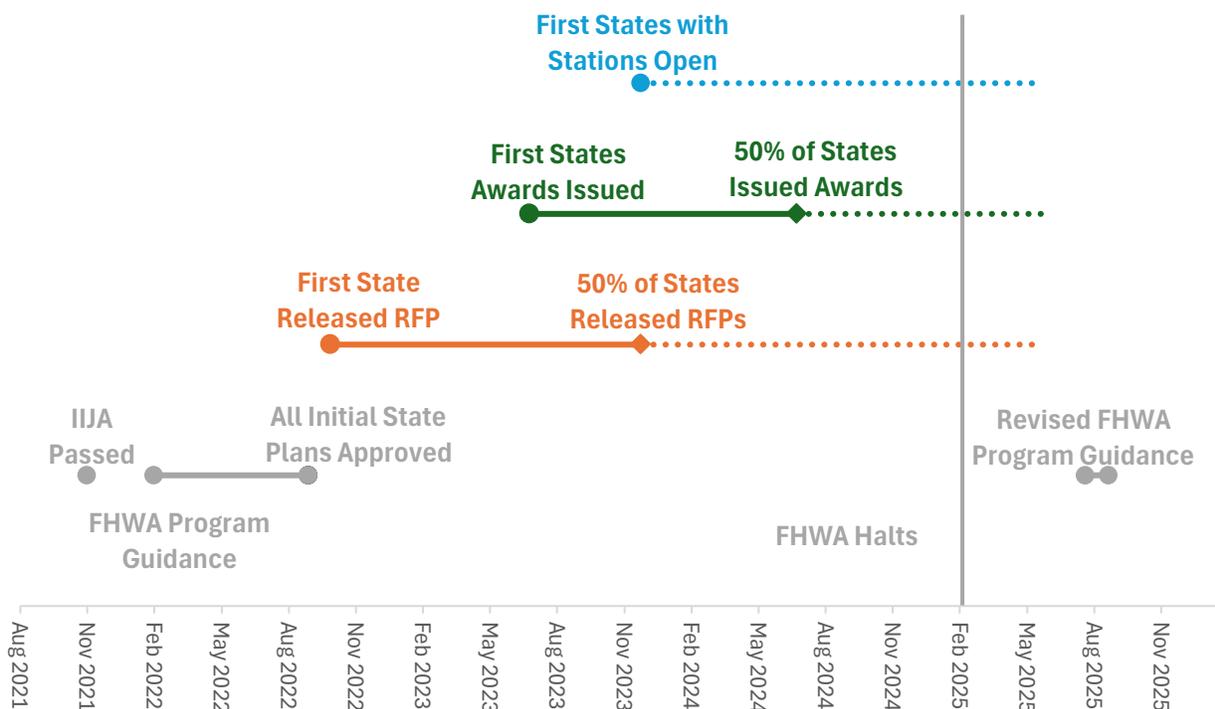
1. **Disburse the funds quickly and efficiently** by utilizing the existing structure of the NEVI state formula funds to maximize the resource capacity and process already built up within state departments of transportation.
2. **Increase flexibility and efficiency in the states** by maintaining current guidance (no action needed in the legislation), removing the annual plan requirement including the requirement to fully build out corridors, expanding eligible activities for funding (see below), and maintaining critical technical assistance funding at \$150 million through the Joint Office of Energy and Transportation. Charging should be encouraged for medium- and heavy-duty vehicles, in communities or at destinations, at the curbside, and through coordinated multi-state or multi-government (state, municipal) planning. Funding should be expanded to include workplace charging and grid upgrades at up to 50 percent of the total project cost.
3. **Increase the flexibility for entities installing chargers** by adapting requirements, making funding available earlier in the process, and encouraging state agency partnerships at the discretion of the state department of transportation.

¹ Forthcoming Atlas Public Policy analysis of private sector announcements, federal and state programs, and utility filings expected early 2026.

Appendix A: Analysis Assumptions

Funds from the National Electric Vehicle Infrastructure (NEVI) program are released to states on a yearly basis after their deployment plans are updated and approved by the Federal Highway Administration (FHWA). As a result, many states structured their award process as multiple rounds of solicitations.

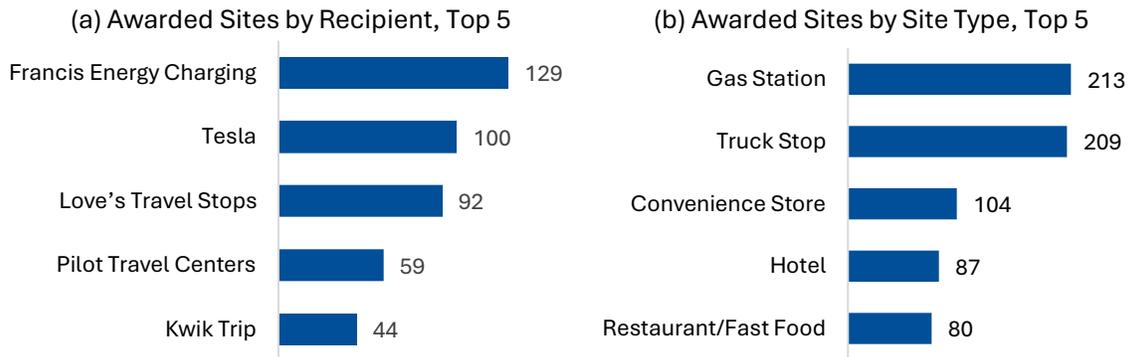
Figure 4. Federal and State NEVI Implementation Milestones (as of September 19, 2025)



Source: Atlas analysis of EV States Clearinghouse [2] data

In almost all states, the state department of transportation receiving NEVI funding holds a competitive process to award contracts to builders. Among the top five award recipients so far, one is a company dedicated to electric vehicle (EV) charging, three are travel centers, and one is an automaker (Figure 5). These developers are building at a variety of sites—most of the awarded charging stations are at either gas stations, truck stops, or convenience stores, but hotels, restaurants, retail, and grocery stores also make up a significant number. And the timeline to compete and select awards has decreased as states have built more muscle memory in process.

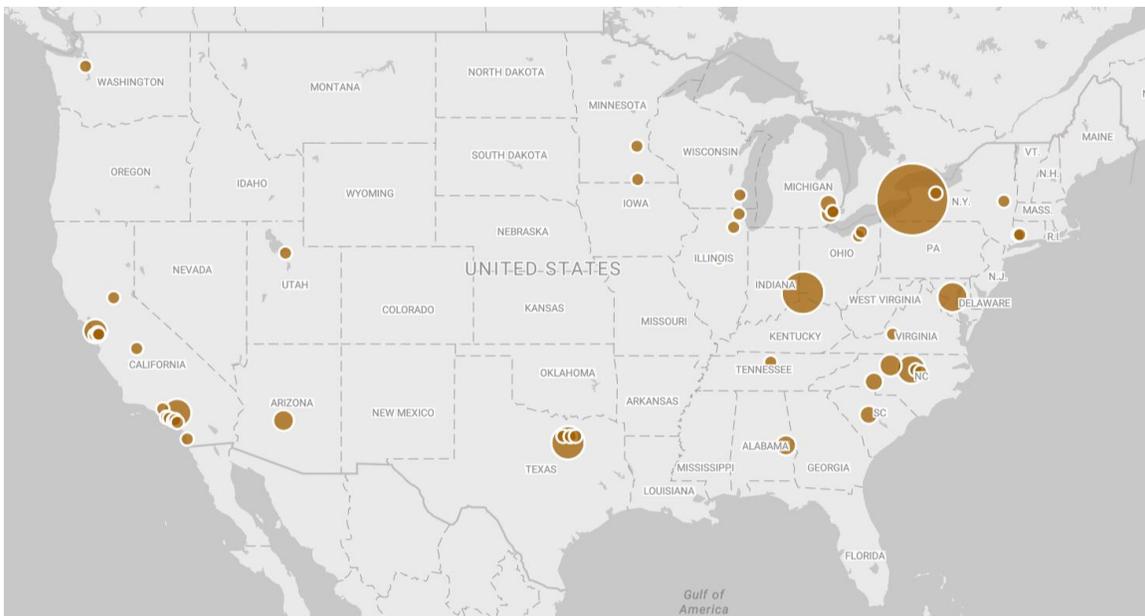
Figure 5. NEVI Awarded Sites by Recipient and Site Type (as of September 2025)



Source: [EV States Clearinghouse](#)

In addition, the NEVI program has spurred domestic manufacturing which is critical to the U.S. economy and competing globally. Figure 6 shows the regions that benefit the most from increased jobs and economic stability from this market.

Figure 6: Domestic Manufacturing Investments for Electric Vehicle Charging Equipment (as of September 2025)



The size of the circle represents the relative size of the investment.

Source: [Clean Economy Tracker](#)

The tables below summarize the research relied upon to estimate the EV stock and charging needs in the future.

Table 2: Summary of estimated light-duty EV stock and charging ports

Organization (Reference)	Est. Light-Duty EV Stock	Est. 2030 Public Ports (including DC Fast Charging)	Est. 2030 DC Fast Charging Ports
ICCT (Bauer et al. 2021)	26,000,000	2,400,000	180,000 (150kW ports)
McKinsey (Kampshoff et al. 2022)	44,000,000	1,200,000	600,000
S&P Global (S&P Global Mobility 2023)	28,000,000	2,300,000	172,000
NREL (Wood et al. 2023)	33,000,000	1,250,000	182,000
BNEF for 2035 (2025)	54,000,000	3,200,000 – 4,000,000	350,000 – 430,000

Table 3: Summary of estimated medium- and heavy-duty EV stock and charging ports

Organization (Reference)	Medium-/Heavy-Duty PEV Stock	Est. 2030 DC Ports
IEA (2025)	525,000	180,000
Atlas Public Policy for 2035 (McKenzie and Nigro 2021)	4,000,000	70,000 – 350,000 (250,000 L2)

Below are other assumptions used as a basis for the investment needs estimate:

- We assumed government and utility share of 20 percent investment, which is about half the share of light-duty EV charging to date, according to forthcoming research from Atlas. This assumption results in an increasingly large role for the private sector.
- We relied on the BNEF EV market penetration for 2035, which reaches almost 50 percent new EV sales by 2035.
- We extrapolated number of chargers needed based on the light-duty vehicle studies in Table 2 for stock of 54 million.
- We used the NREL 2030 Needs Assessment for costs of charging for Level 2 and DC fast charging. For Level 2 charging, we used the low- and high-end estimate for commercial

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hardware. For DC fast charging, we used low-end estimate for 150 kilowatts and high-end for 350 kilowatts.

- For medium- and heavy-duty vehicles, we relied on a previous Atlas analysis and reduced the EV market stock in 2035 to 20 percent.
- We assumed two to 3.5 public chargers per 100 vehicles by relying on Atlas internal data for on route public charging for medium- and heavy-duty charging.
- We assumed no public Level 2 stations for medium- and heavy-duty vehicles.
- We relied on DC fast charging cost assumptions from the NREL 2030 Needs Assessment (low-end and high-end for 350 kilowatts).
- Table 4 below breaks down the assumptions on the amount of financial support per charging port from government.

Table 4: Estimated government support per charging port

	Level 2 Light-Duty Vehicles	DC Fast Charging Light-Duty Vehicles	DC Fast Charging Medium- and Heavy- Duty Vehicles
Government Funding Estimated	\$2B - \$8B	\$8B - \$24B	\$2B - \$7B
Number of Ports Estimated	2,850,000 – 3,600,000	350,000 – 430,000	42,000 – 120,000
Per Port Estimate	\$ 900 – \$1,200	\$22,000 - \$57,000	\$36,000 – \$57,000