Program Advisory Council Meeting
Q1 2026

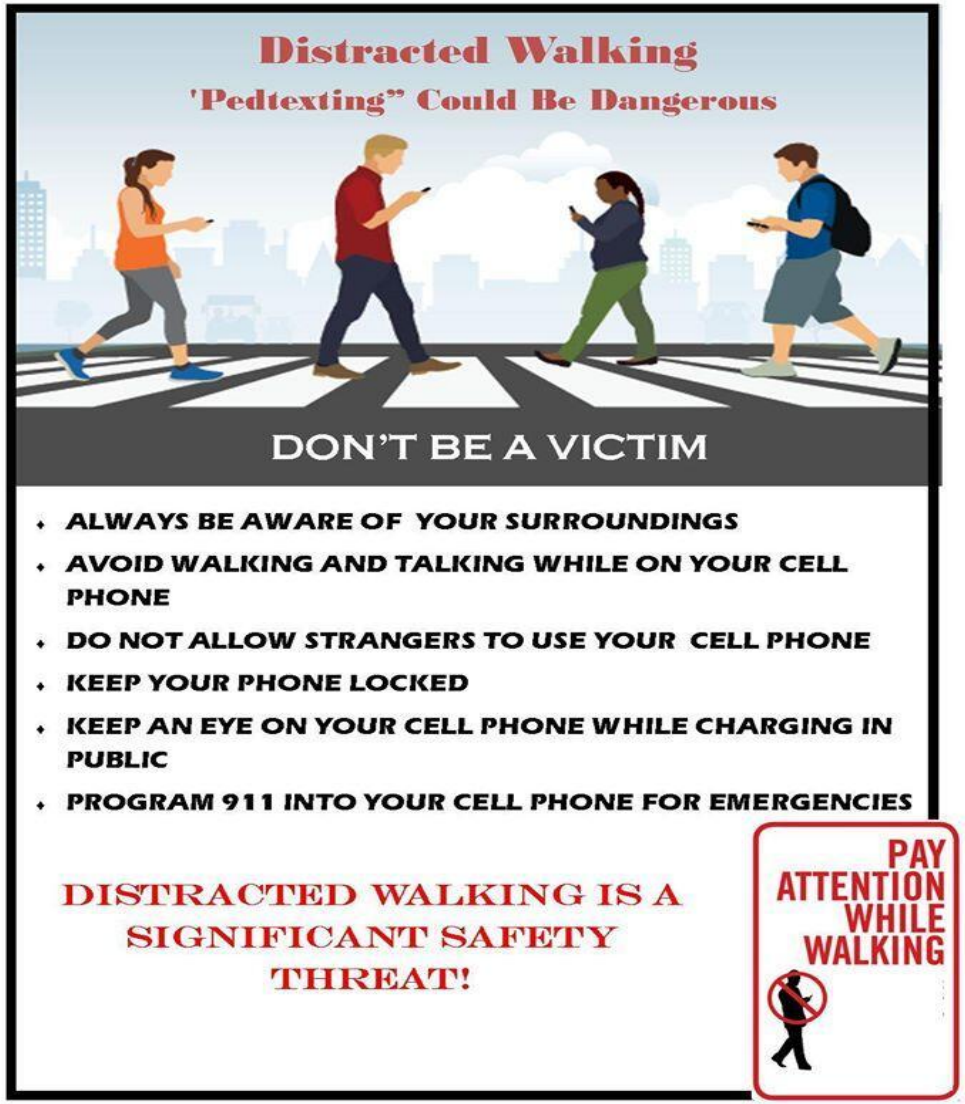
April 29, 2026

Together, Building
a Better California

Agenda

Introduction | Agenda | Safety	1 minute
Meeting Timeline | Market Update	3 minutes
EV Good News!	6 minutes
Internal Fleet Electrification (IFE) Resiliency	15 minutes
EV Advisory Services (EVAS)	10 minutes
EV Fleet Update	5 minutes
EV Fast Charge Update	5 minutes
EV Charge Parks Update	5 minutes
LCFS Update---Pre-Owned EV	10 minutes
VGI Pilots	10 minutes
EPIC 4.03	10 minutes
Conclusion	1 minute

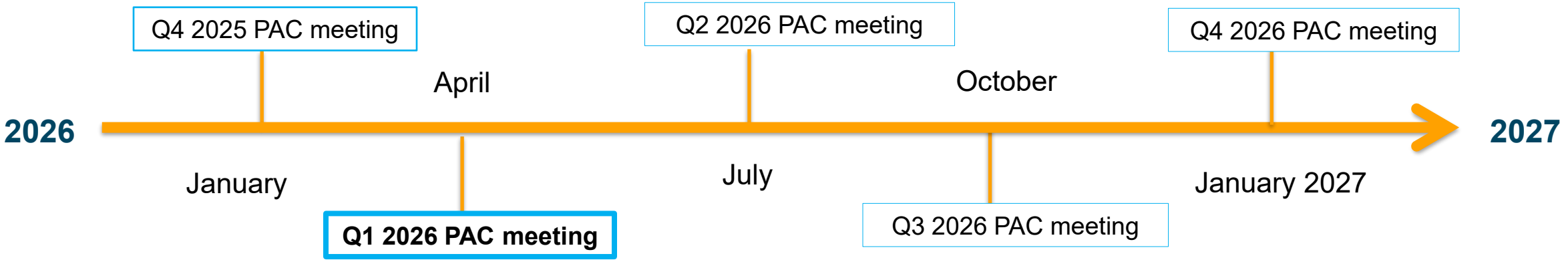
Safety


Distracted Walking
'Pedtexting" Could Be Dangerous
DON'T BE A VICTIM
• ALWAYS BE AWARE OF YOUR SURROUNDINGS
• AVOID WALKING AND TALKING WHILE ON YOUR CELL PHONE
• DO NOT ALLOW STRANGERS TO USE YOUR CELL PHONE
• KEEP YOUR PHONE LOCKED
• KEEP AN EYE ON YOUR CELL PHONE WHILE CHARGING IN PUBLIC
• PROGRAM 911 INTO YOUR CELL PHONE FOR EMERGENCIES
DISTRACTED WALKING IS A SIGNIFICANT SAFETY THREAT!
PAY ATTENTION WHILE WALKING

Clean Energy Transportation Program Advisory Council Meetings

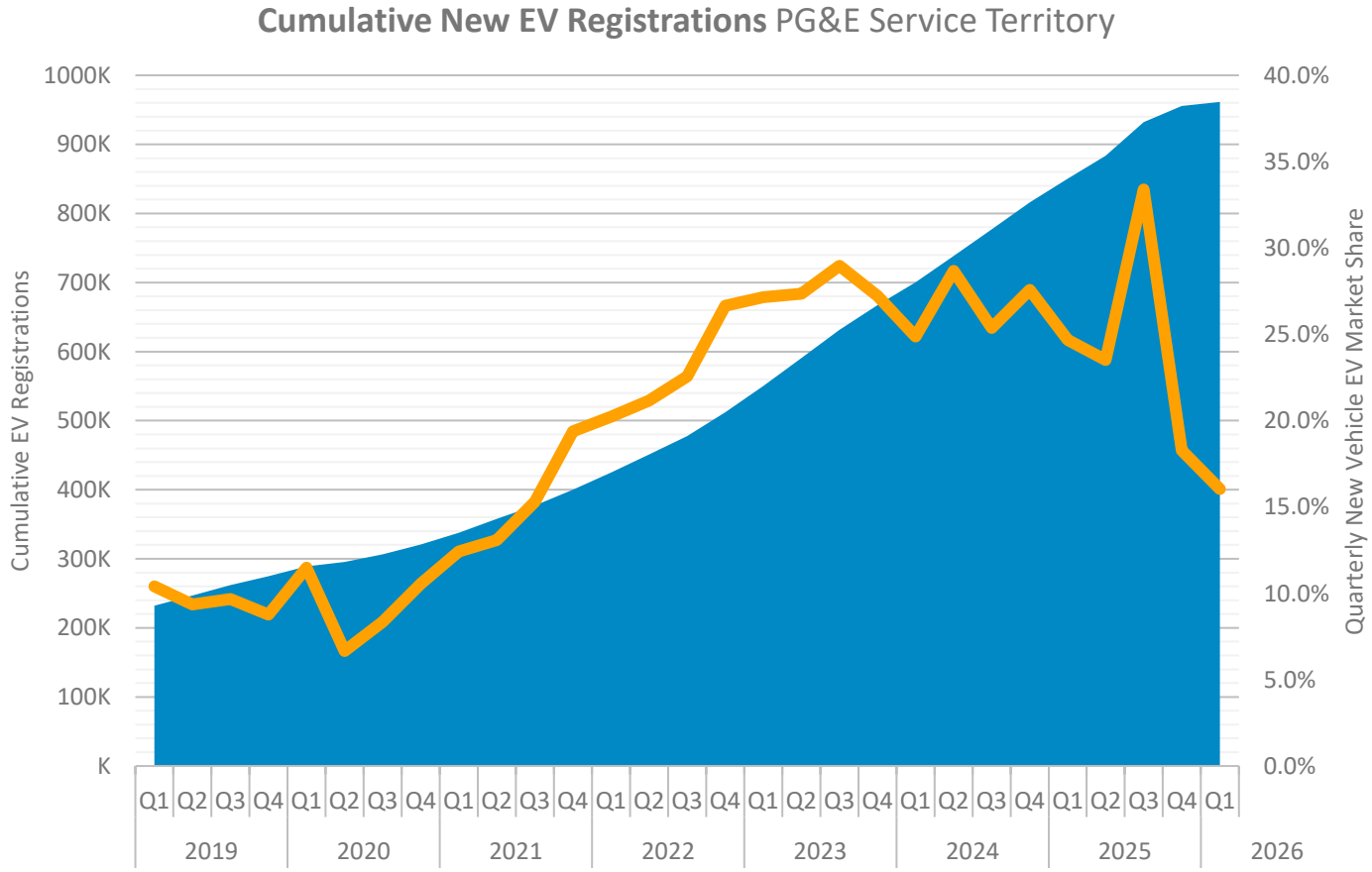
Overview

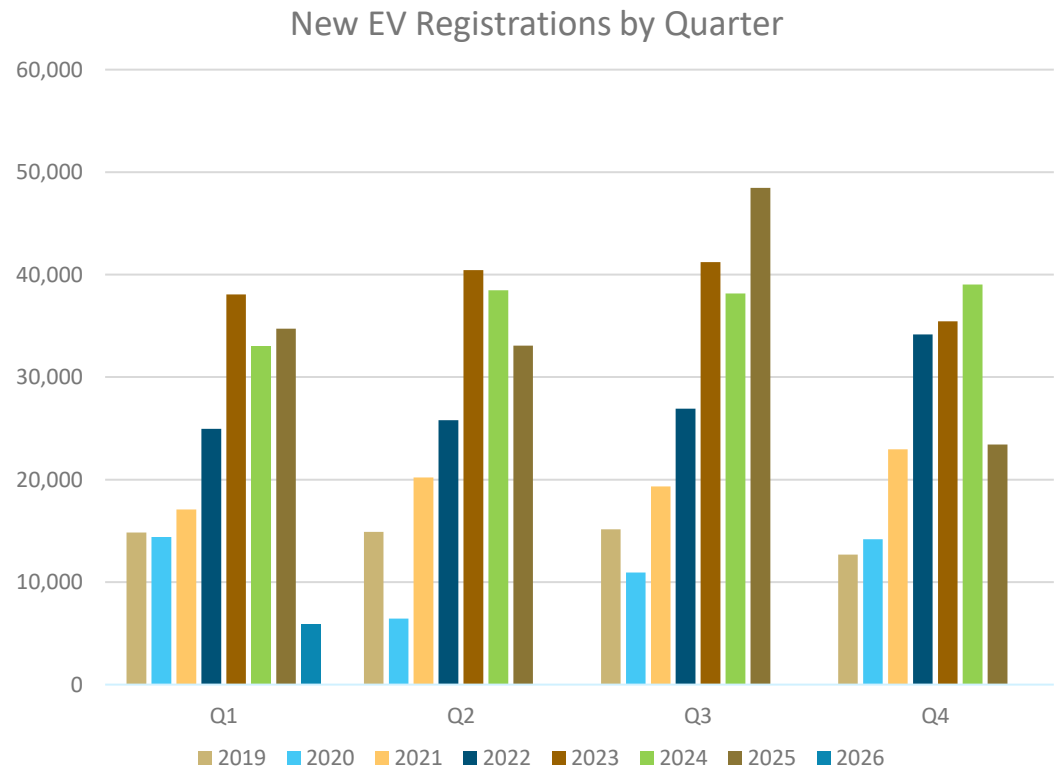
- PG&E has expanded our efforts on transportation electrification (TE) with several filings, pilots and programs in progress
- CPUC has directed PG&E to consult a Program Advisory Council (PAC) in the development of key TE pilots and programs to gain feedback from industry stakeholders
- This platform will serve to gather insight and feedback on PG&E's proposals and ongoing programs



EV Market Update

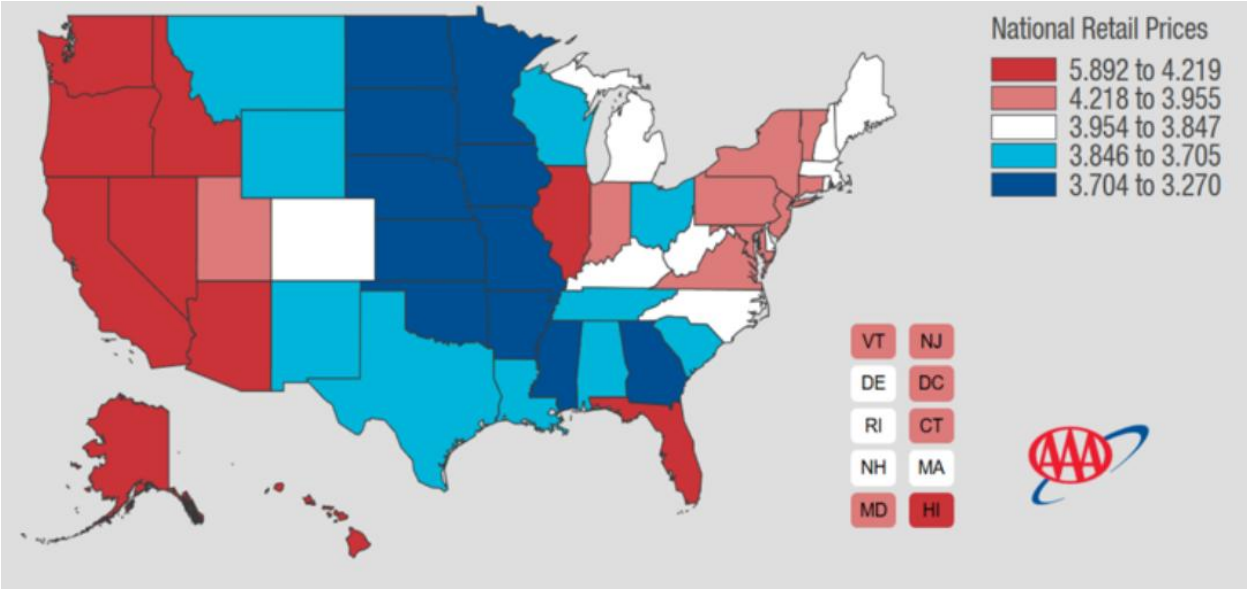
967,619 EVs registered in PG&E service territory through January 2026





Source: EPRI, Based on external registration data through January 2026

EV Market News!



Source: Graphic by Triple A showing range of gasoline prices as of April 1, 2026

New EVs*			Used EVs*		
Make	**Model**	**% increase**	**Make**	**Model**	**% increase**
Chevrolet	Equinox EV	21.9%	Tesla	Model 3	52.2%
Ford	Mustang Mach-E	9.1%	Tesla	Model Y	38.7%
Hyundai	Ioniq 5	42.7%	Ford	Mustang Mach-E	13.7%

Source: CarGurus.com

Analyses from USC and UC Davis suggest that, under current conditions, **gas prices could rise 75% from April 2025 levels**, potentially reaching **$7.35–$8.44 per gallon by the end of 2026**

Cox Automotive estimates new EV sales reached 82,629 units for March, **up 20.2% from February**, and used EV sales rose even more dramatically, to 42,924 units, **a 53.9% month-to-month jump**.

Utility Fleet and Facility Electrification & Resiliency

Electrification Workshop | March 2026

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CleanFleet

Scope and Objectives of IFE

CleanFleet

PG&E is electrifying its entire fleet of 9,500 vehicles by 2045, with a goal to electrify 3,300 vehicles in our fleet by 2030.

PG&E's fleet electrification aligns with our 10-Year True North strategy goal to unleash the full potential of electric vehicles and enable 3 million EVs to connect to PG&E's grid by 2030.

Why are we doing this?

- Contribute to the 50% reduction of Scope 1 and 2 Emissions by 2030, in support of PG&E's 2040 carbon neutrality goal
- Promote fleet safety through procurement of vehicles with newest safety systems
- Lead by example and influence market to drive EV adoption and downward rate pressure

Infrastructure and EVSEs – Strategy

The IFE Program built a strategic Workplan with a planning horizon of 10 years. Implementation was broken into 2 mobilizations to reduce disruptions to business and to limit stranding assets.

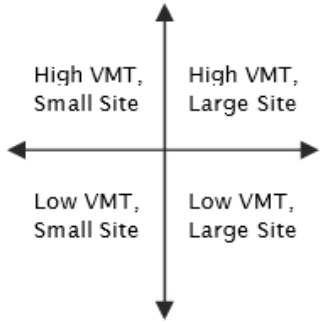
General Strategic Process Decisions

- Determined drivers to IFE Program targets and setup general plan to achieve/exceed those targets
- Initiated large pool of projects early in the IFE program to mitigate potential issues. Provides ability to substitute projects
  - Sites that experience design constraints or complex customers
  - Unexpected lengthy permit timelines
- Standardization of switchgear, panels, and transformers; parking, and EVSE placement, to limit impact to schedule
- Phased installation of EVSEs at large sites
  - Cost savings associated with avoiding active and unused asset
  - standby ports; ready to activate within 1-2 months

Site Selection Process

Site prioritization is based on several factors:

1. Targeting depots by CET category to gain learnings from each depot class
2. Prioritizing sites with specific vehicle types and their delivery schedule (MT50e)
3. Clustering sites based off geography for corridor based DC fast charging potential



Infrastructure and EVSEs – ALM

The IFE Program standardized the use of Automated Load Management to influence our customers and lead by example in addition to reducing infrastructure costs and grid capacity constraints thereby reducing impact to rates and our customers.

IFE EVSE Management Scheme

Site Requirements

- Manage EVSE load by topping off BEV nightly over a 10-hour charging window on BEV tariff
- Control EVSE load based on charging window
- Ability to change charging window for emergency response
- Ability to override LMC for EM response
- Ability to adjust power limits during loss of grid power
- App with all IFE chargers on the site and ability to start a charge and see chargers online or occupied

Power System Architecture

Max load at EVSE	· 100A for ACWB · 40A for DCWB or 80A for C50 · 600A for A400
Max load at LEV panel	· 216kW maximum load and shared equally among up to 24 ACWB · Load to be managed as block charging for 10 hours · This will reduce demand charges on BEV rate
Max load at HEV panel	· 500kW maximum load and shared equally among up to 20 DCWB/ 10 – C50 · Load to be managed as block charging for 10 hours · This will reduce demand charges on BEV rate
Max Load at MSB	· Based on 100% of the main breaker (1.6MW max demand) · Priority to DC island · 2nd priority to HEV panel
DC Charging Island	· DC charging island will take priority over all other charging and must be available 24x7 · Initially commissioned as free vend; tested and verified option for RFID
Emergency Response	· Need to be able to load manage against a generator output · Need to have control of output at individual DC chargers during events

Infrastructure and EVSEs – Resiliency

The IFE Program proposed a targeted resiliency solution that meets our fleets needs during emergencies, bearing in mind space constraints and affordability to meet the charging needs at each depot.

The Challenge

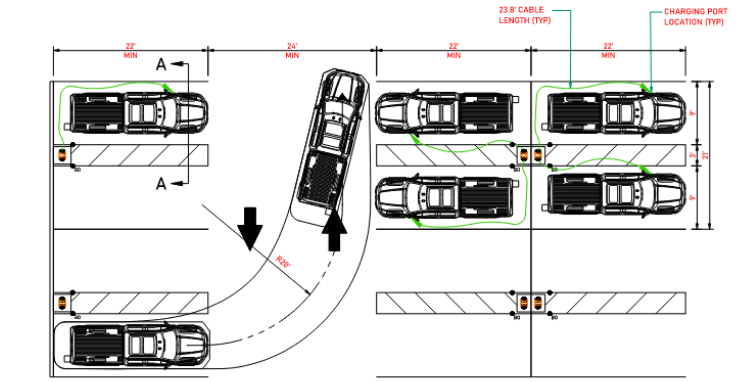
- In 2030, PG&E fleet will comprise 3300 light, medium and heavy-duty vehicles (~50%), each driving an average of 83mi/day – requiring 250MWh per night
- While we must provide resiliency for our fleet, we lack sufficient space, funds, or dwell time to accommodate 100% resiliency with permanent generation
- Current onsite fuel capabilities are roughly 10x higher and have a footprint 5x times smaller than the capacity of a gold-plated resiliency solution.
- Along with demand, charging speed is a key component of resiliency. MDHD EV require roughly 10x dwell time on the 400kW fueling island

General Resiliency Strategy

Looking at 10 years of outage data across 204 PG&E depots, we determined that:

- Our electric fleet will ride through any outage under 6 hours
- This divided the depots into 3 resiliency tiers:
  - Tier 1: 0 outages over 6 hours
  - Tier 2: 1+ outages over 6 hours
  - Tier 3: 2+ outage over 16 hours
- Under emergency conditions, we provide resiliency such that we can accommodate a 50% increase in number of crews dispatched
- We developed a targeted resiliency solution, bearing in mind operational readiness, space constraints and affordability to meet the charging needs at each depot using standardized solutions based on tier assignment

Q&A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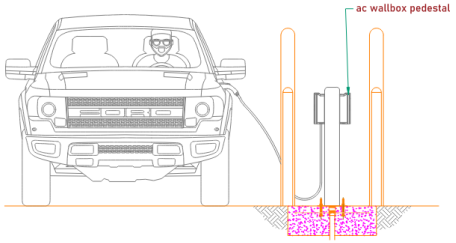

ac wallbox pedestal

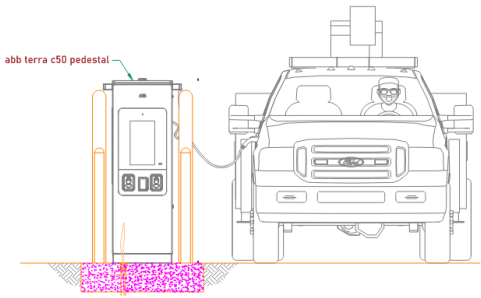
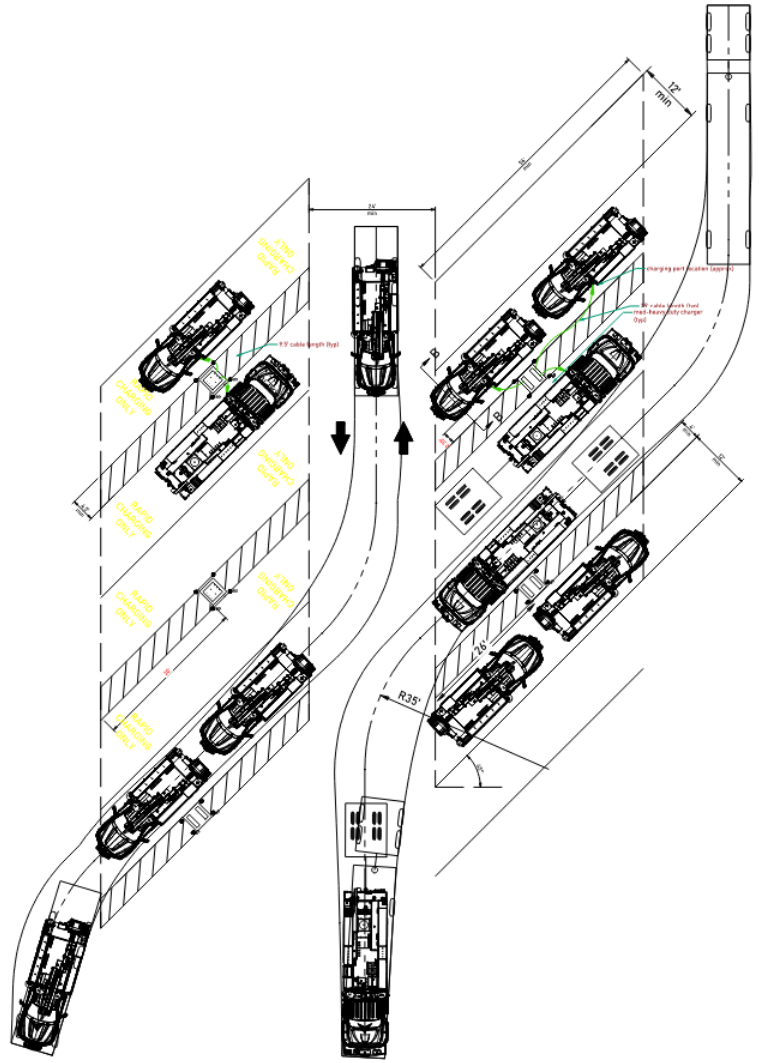


abb terra c50 pedestal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min
24'
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R35'

EV Advisory Services (EVAS)

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EV Advisory Services (EVAS)

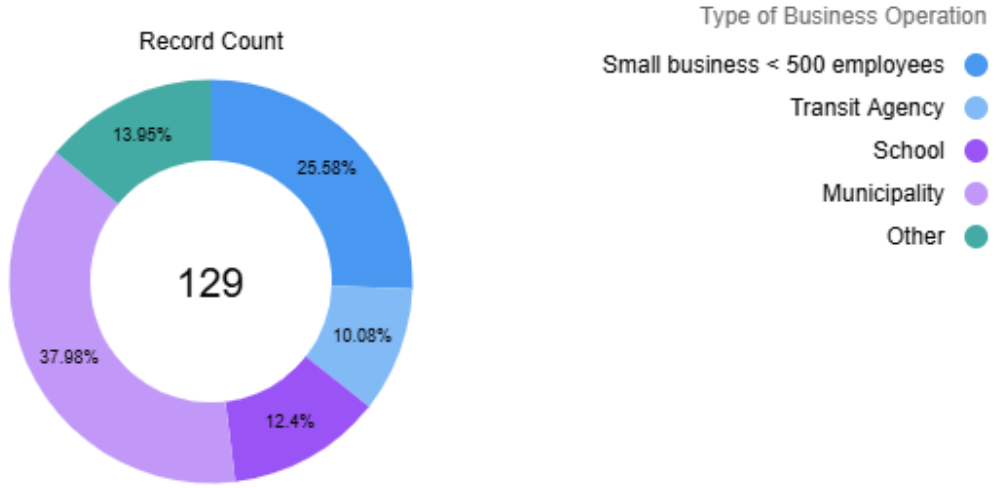
Status as of 3/31/2026

Program to-date	Total
Sites Served	434
Unique Customers	120

Program Budget Overview

Spend-to-Date	Remaining Funds
$3.63M	$15.14M

Customers Served by Segment



Program Updates

- Public Workshop for The Transportation Electrification Framework Technical Assistance (TEF TA) Handbook on February 3, 2026. Advice Letter (5784-E) and Workshop Report filed on April 6, 2026.
- Attended and presented at numerous industry events, including various Community-Based Organization (CBO) webinars and a One-Stop Truck Event.

Lessons Learned and Best Practices

Multi-site customers:

The Portfolio Capacity Check Service allows multi-site customers to prioritize sites based on currently available and potential future capacity.

The creation of this service has helped one municipality with 50+ potential sites prioritize their first seven service applications and inform the order of priority for future sites.

SB 350 Standard Review Projects

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EV Fleet Updates

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EV Fleet Program Update

Status as of 3/31/2026

	Sites	MDHD EVs Committed
Applications	835	-
Viable Contracts[1]	431[2]	7,830
Construction Complete	193	4,337
Activated	178	4,070

[1] *Viable contracts are all contracts signed to date excluding cancelled and withdrawn.*

[2] *Does not reflect approximately 30 contracts that have expressed intent to cancel their project.*

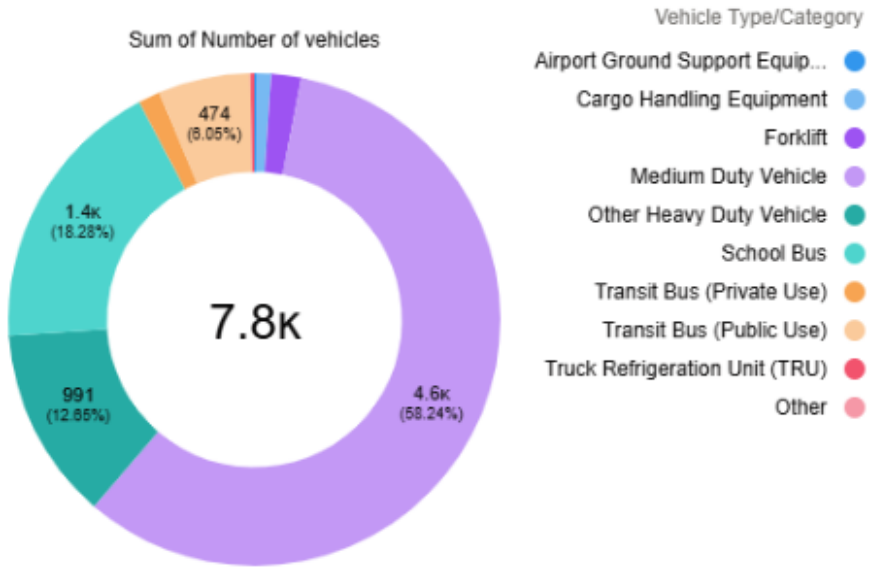
Program Budget Overview

Spend-to-Date	Remaining Funds
$94.0M	$142.3M

Lessons Learned/Best Practices

- Advice Letter 7855-E for transit on-route charging vehicle attribution was approved by the CPUC on 4/16/26, formalizing a path for on-route charging sites to participate in EV Fleet.
- Program application deadline approaching - June 30, 2026.

Viable Contracts: Vehicle Type



Program Highlights

- Program has exceeded its vehicle target (6,500 vehicles) and site goal (375 sites)
- 195 of the 431 signed contracts **(45%) are in DACs**
- Signed 38 contracts in Q1, supporting 560 vehicles
- Program is seeing a **diverse mix of vehicle types**; medium duty vehicles are dominant due to various applications, availability, operational compatibility; school buses, heavy duty vehicles, and transit buses are also successfully enrolling in the program

Fleet EVSE Rebates Annual Review

Power output	EVSE Rebate for eligible customers*
Up to 50 kW	50% of the cost of EV charger, up to $15,000
50.1 kW – 149.9 kW	50% of the cost of EV charger, up to $25,000
150 kW and above	50% of the cost of EV charger, up to $42,000

*Eligible customers include schools, transit agencies, and non-Fortune 1000 companies located in DACs

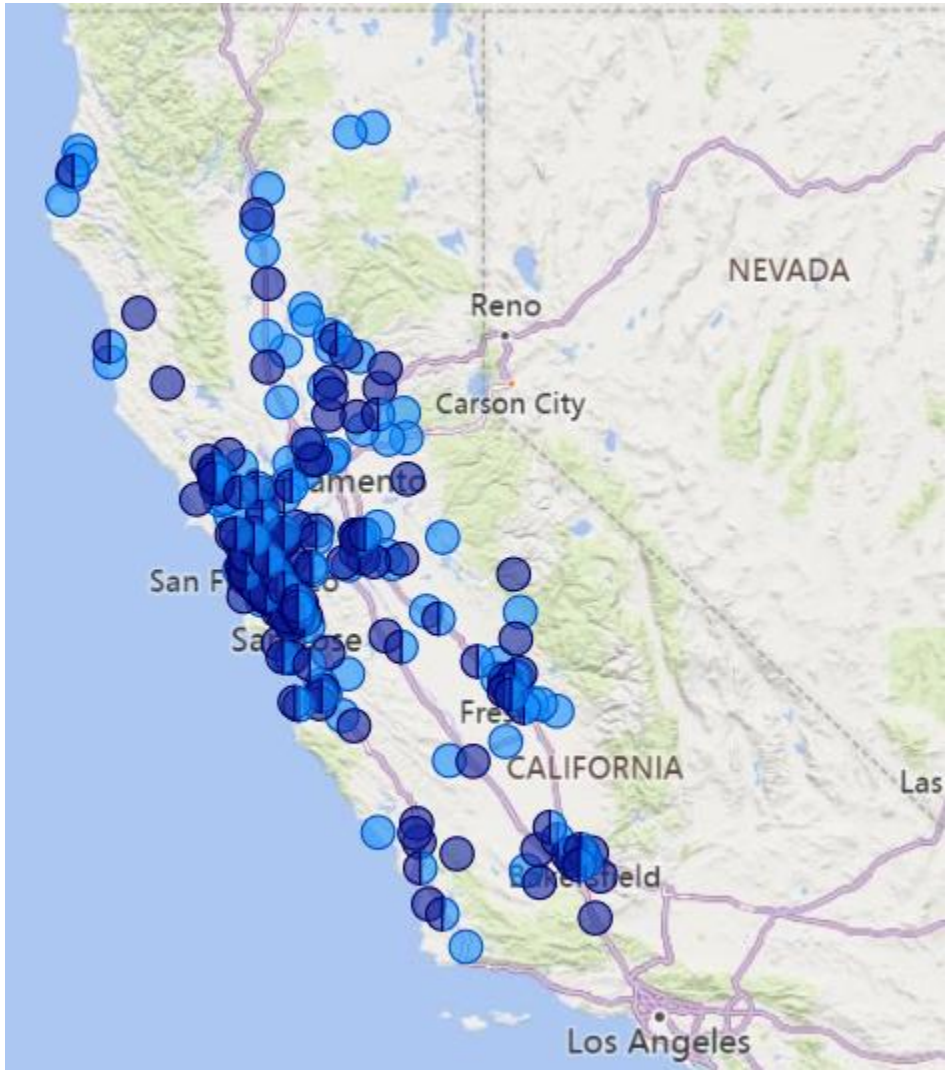
Charger rebate levels continue to match or exceed current EVSE prices – no changes to rebate levels proposed at this time

E-mail Sarah Knight (sarah.knight@pge.com) if you have comments

Transit and School Bus Rebates $37,350,000
DAC Rebates $14,777,063

EV Fleet Construction and Activation

Activated sites and sites in construction by zip code



EV Fast Charge

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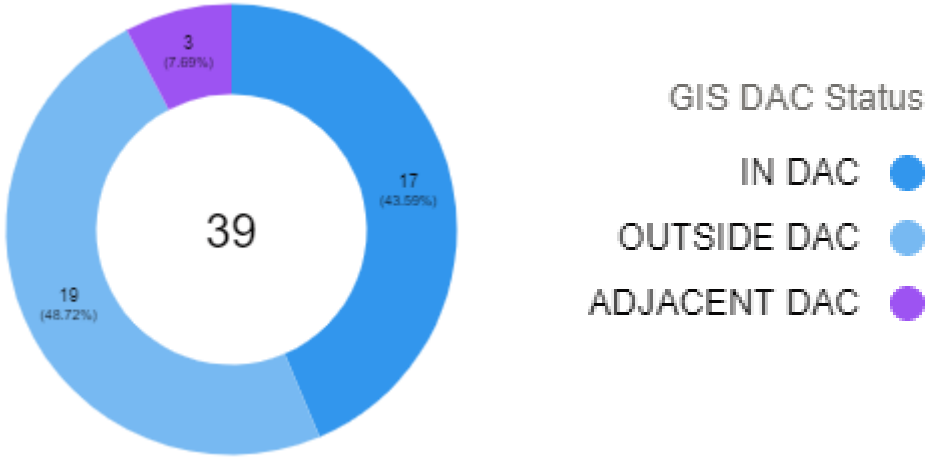
EV Fast Charge Program Update

Status as of 3/31/2026

	Sites	Ports
Applications	272	1,225
Contracted Sites[1]	39[2]	204
Constructed	37	190
Activated	35	180

[1]Contracted sites counts excludes cancelled projects.
[2] Does not reflect 2 contracts that were cancelled.

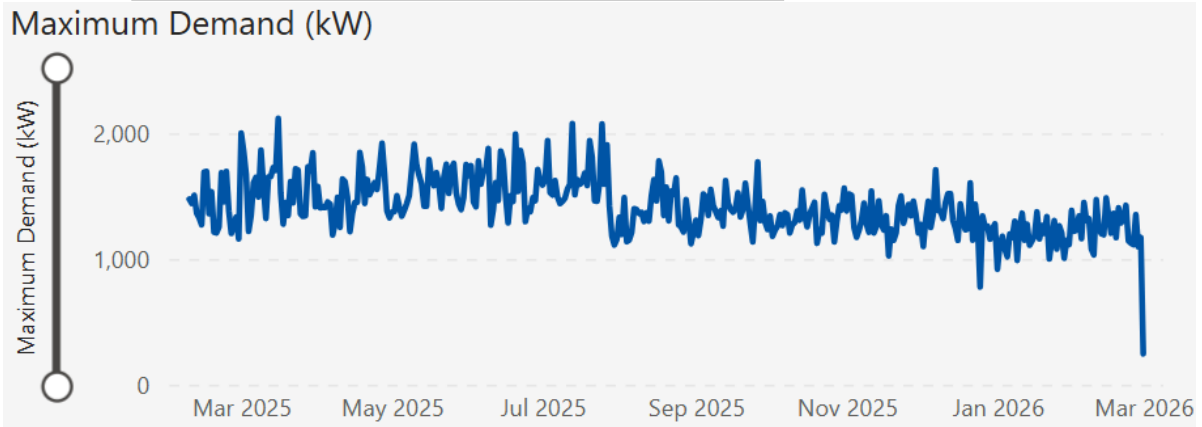
DAC Targets: Signed Contracts



Program Budget Overview

Spend-to-Date	Remaining Funds
$21.6M	$0.8M

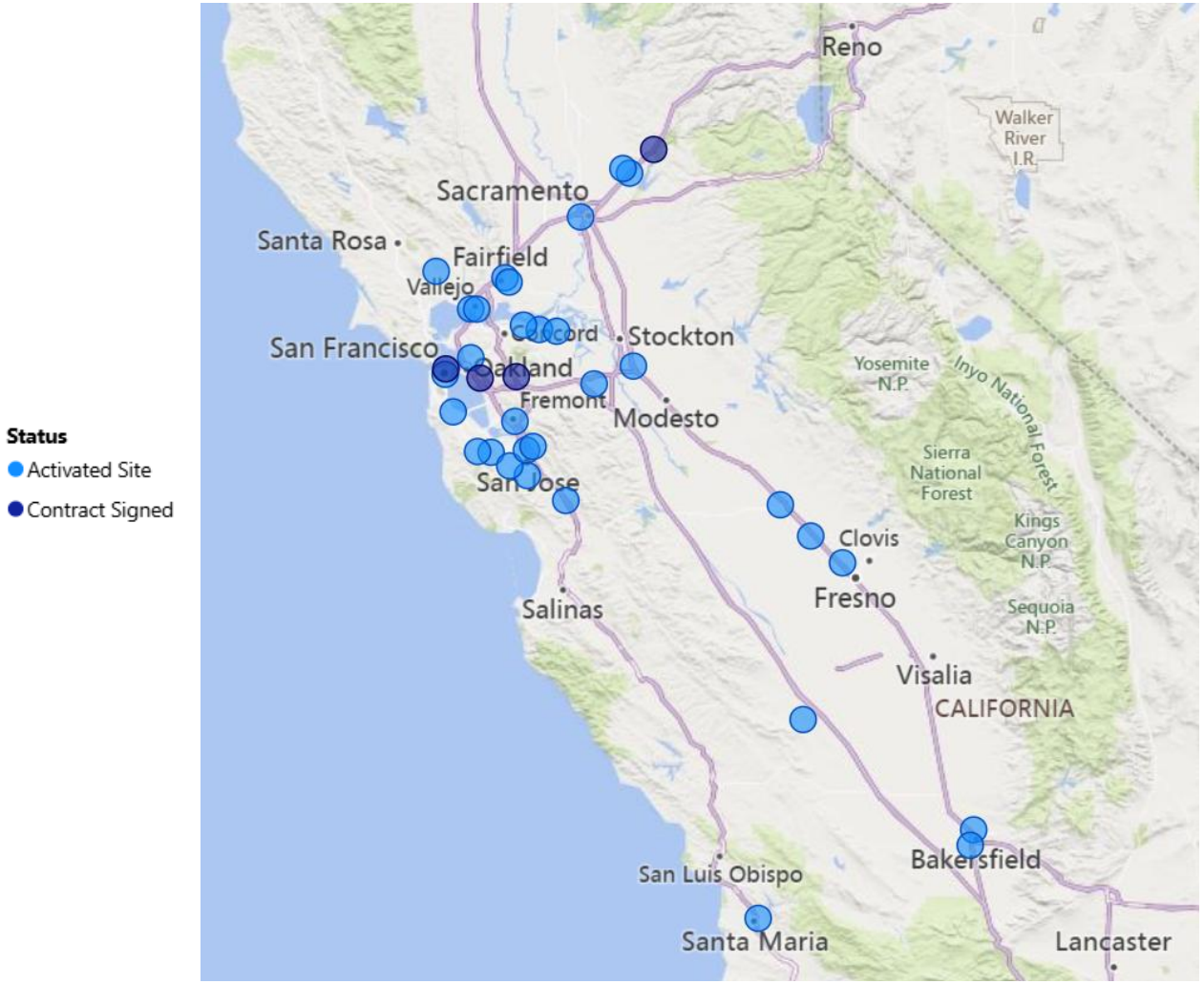
Portfolio-wide Utilization Trends



Source: SRP Evaluation Dashboard

Fast Charge Sites Contracted and Activated

Activated sites and sites contracted by zip code



AB1083 Standard Review Project

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EV Charge Parks Update

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EV Charge Parks Program Update

Status as of 3/31/2026

		Sites	Ports
Applications		131	0
Contracted Sites		6	54
Constructed		0	0
Activated		0	0

Program Budget Overview

Spend-to-Date	Remaining Funds
$1.2	$4.3M

Lessons Learned / Best Practices

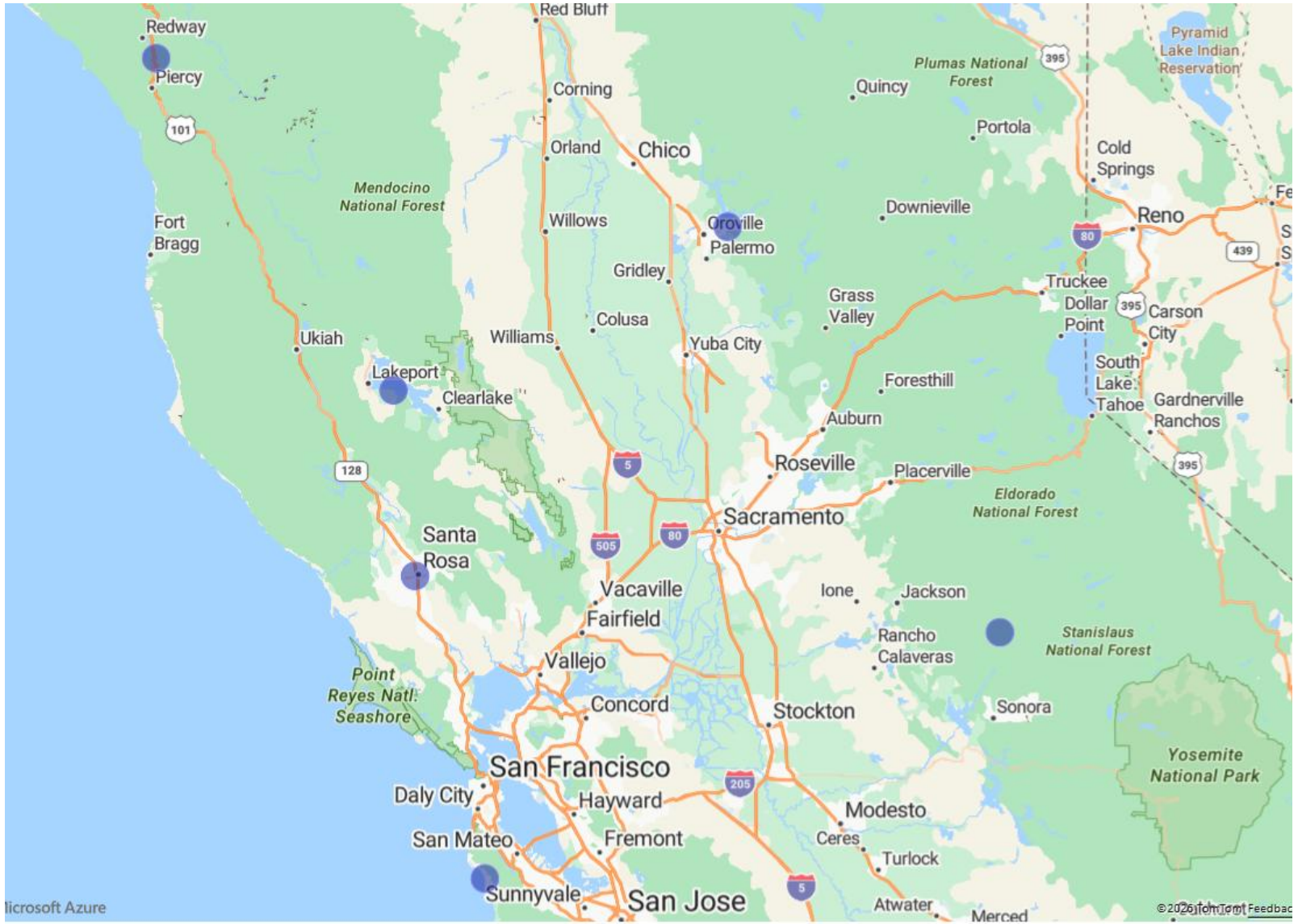
- Collaborating with the Parks Dept. to create a permitting checklist for future projects given the unique requirements.

Program Update

- Permitting has experienced longer timelines than anticipated, but making progress on reviews with key depts.
- All Right of Entries (ROEs) under review by individual Districts, waiting on final permitting documents before full execution.
- Calaveras Big Trees project in the final phases of permitting with Clear Lake SP closely following.

EV Charge Parks Sites

State Parks in PG&E Service Territory



Assessment Status ● Contract Signed

Additional Program Updates

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LCFS Updates - Pre-Owned EV

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Pre-Owned EV Rebate Program – Program Overview

Program Overview

- **Audience:** residential
- **Model:** rebate for purchase or lease of used EV
- **Incentive**: $1,000 base, $4,000 for Rebate Plus
- **Timeline:** 2023-2026
- **Status:** open to applications

$104.6M Program budget

Feb ’23 Program launch

Eligibility

- Active electric residential customer (SF or MFH)
- Vehicle purchased within 180 days
- Income-qualified: <80% of AMI or qualifying public assistance program

Program Highlights

- Equity component: $3,000 adder for income-qualified applicants
- Outreach from PG&E, third-party implementer, and community-based organization networks are critical for serving Disadvantaged Communities
- Third-party implemented (Center for Sustainable Energy)
- Program open to enrollments until 12/31/2026 or until program funding runs out

Pre-Owned EV Rebate Program – Update

Status as of 03/31/2026

Total Applications Submitted	31,874
Total Rebates Paid	25,502

Program Budget Overview as of 03/31/2026

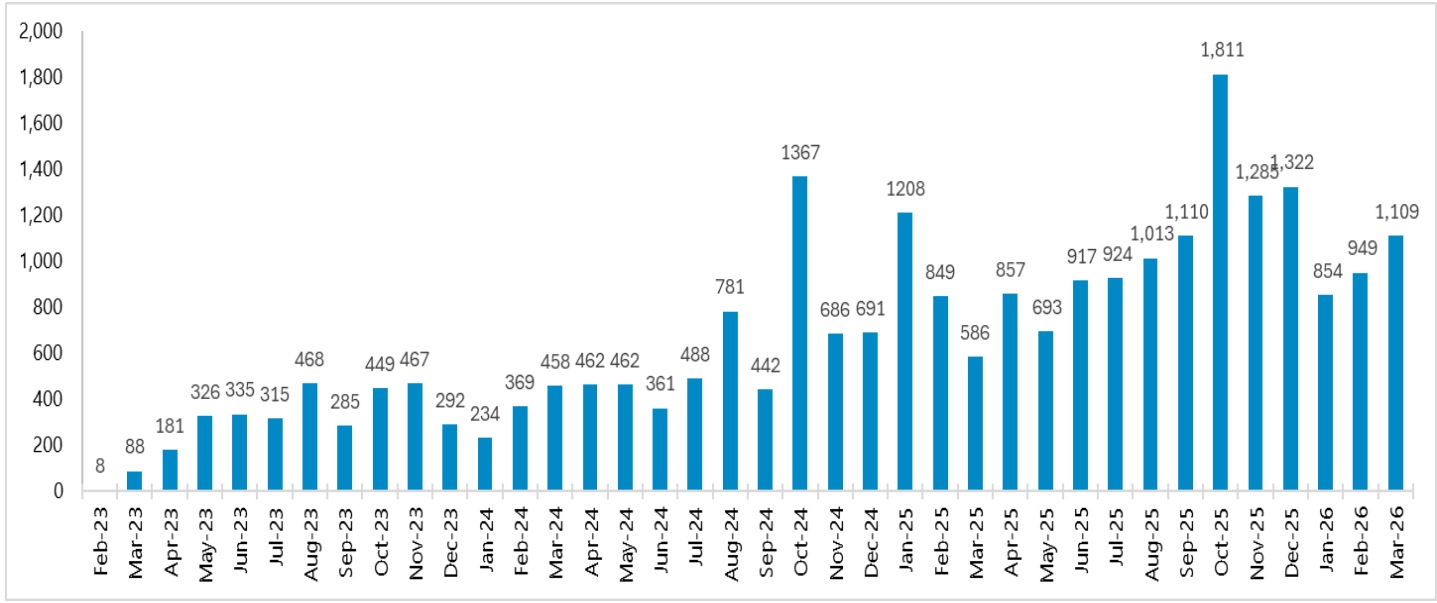
Spend-to-Date	Remaining Funds
$71.2	$33.4M

Lessons Learned/Best Practices

Dynamic few quarters in used EV market

- **2025 Q3** ↑↑ Spike
  - Tax credit expiration created artificial demand surge as buyers accelerated purchases
- **2025 Q4** ↓↓ Drop
  - Pull-forward hangover and overcorrection from baseline
- **2026 Q1** ↑ Rebound
  - Buyers re-engaging, early signs of oil price sensitivity

Rebates Paid Over Time (Feb 2023 – Mar 2026)



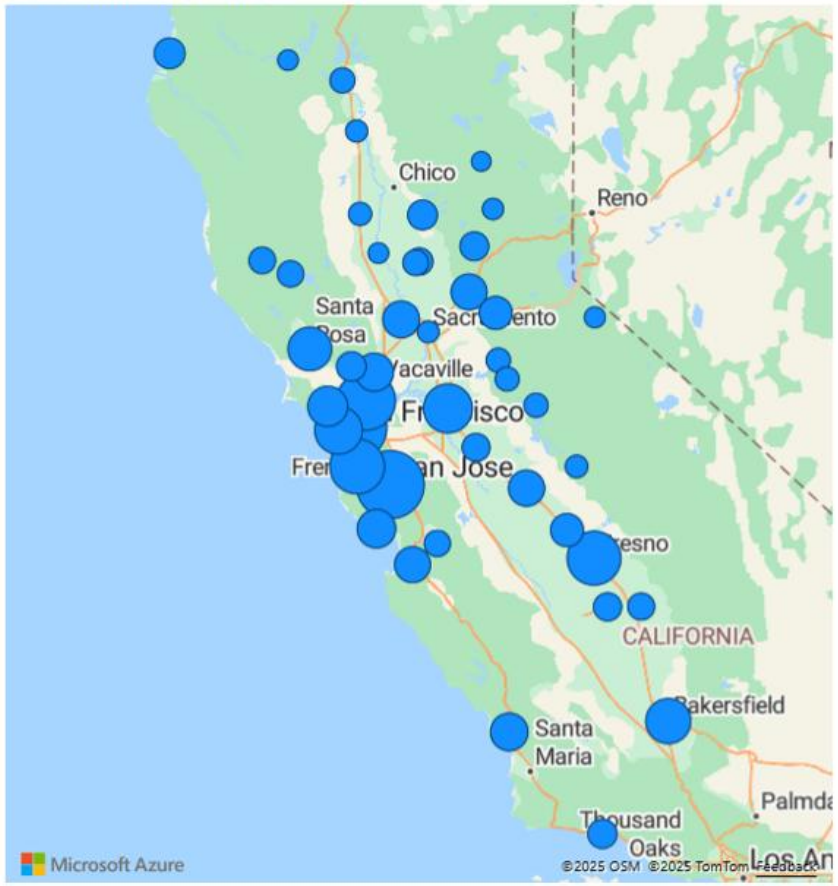
Income Qualified Program Highlights

- Made up 54% of total volume in 2025 (up from 39% in 2024), this trend has continued in 2026.
- 60% of recipients reported that the POEV was essential to their decision to purchase or lease an EV.
- 82% of recipients reported that their EV purchase either replaced an ICE vehicle or was an additional vehicle to the household.

Pre-Owned EV Rebate Program – 2025 Key Points

Due to higher-than-anticipated participation in 2025, and a higher percentage of Rebate Plus applicants, the program requested additional funding to close out 2026

# of Rebates by County



(map as of 9/30/2025)

2025 Overspend Drivers

- **Federal Tax Credit ending** drove a surge of applications in August and September
- **Exceeded rebate forecast** by ~1,500 rebates
- **Jump in Rebate Plus volume** in 2025 accelerated overspend

Pre-Owned EV Rebate Program – 2026 Roadmap

Request and Next Steps

2026 Planning

- PG&E AL 7831-E approved 3/25
  - Authorized $18M in additional spending to help ensure sufficient budget for 2026 operations.
  - PG&E will be monitoring remaining budget and possible early closure of program if necessary.

2027 Planning

- PG&E to file Tier 2 AL in September for 2027 program expansion.
  - We intend to use this filing as an opportunity to propose program enhancements, including a possible shift to 100% equity.
- Any unspent funds by the end of 2026 will be rolled into the 2027 extension request.

VGI Pilots

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V2X Pilots

Status

V2X Residential Pilot

Eligible Products

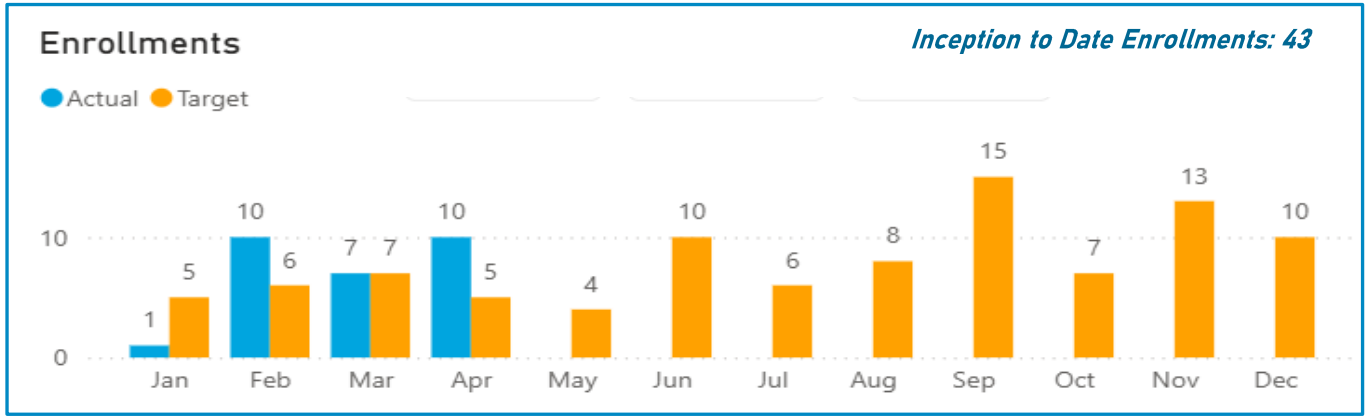
FORD	Ford Charge Station Pro and Home Integration System, exclusively sold by Sunrun paired with the Ford F-150 Lightning
GM	GM Energy PowerShift charger and V2H Enablement Kit paired with any of 9 models across Chevrolet, Cadillac, and GMC
TESLA	NEW! Tesla Powershare Gateway and Tesla Universal Wall Connector paired with the Tesla Cybertruck

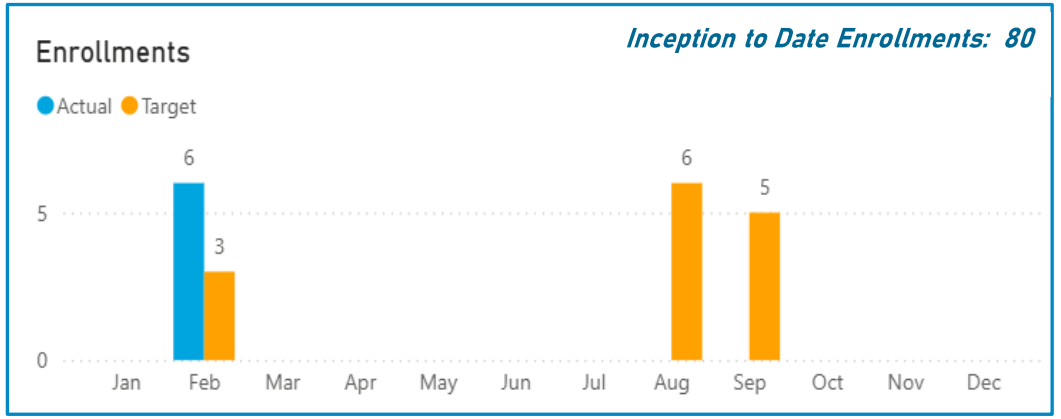
V2X Commercial Pilot

Eligible Products

BYD – RIDE (Bus):	paired with Tellus
Micro Bird & Blue Bird (Bus):	paired with Borg Warner
Nissan Leaf:	paired with Femata
NEW! Thomas Bus Gen1 (Bus):	paired with Tellus & Borg Warner
NEW! Thomas Bus Gen2 (Bus):	paired with Borg Warner

Trend





Highlights

- In 2025, PG&E learned multiple variables are affecting enrollment: equipment cost, tech complexity, interconnection process, HFP participation
- PG&E's focused **customer engagement** process has been a **key driver of enrollment** in 2026.
- Stakeholders shared HFP is complex, value proposition is unpredictable, limited technical readiness, misalign. of incentives for OEMs/vendors

- Added **6 new chargers** at a Fremont USD site
- **11 additional chargers pending** at Richmond First Student, Pittsburg USD, and Fremont USD.

*The Microgrid V2X pilot is sunsetting pending final approval from the CPUC.

EPIC 4.03

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EPIC 4.03 Overview & Objectives

Program Overview

EPIC 4.03 EV Charging Solutions for Parking-Constrained Customers (PCC) ~ $4.8 million

Goal: Identify scalable EV charging solutions to inform PG&E's strategy to serve customers with parking constraints

Timeline: Launched Q1-2025 and concludes Q4-2028

- Phase 1 – Market Analysis and V1 Report
- Phase 2 – Demonstration Projects & Evaluation
- Phase 3 – V2 Report and EPIC Report

Partners: Cadmus and Viridis (subcontractor)

Objectives

Quantify and describe the PCC market across PG&E's service territory, including the size, characteristics, and geographic distribution of customers lacking dedicated home parking or access to home charging.

Identify cross-cutting deployment barriers, with emphasis on process and coordination costs (soft costs) that drive delays and total installed cost.

Access practical charging technology deployment models, including smart outlets, public right-of-way (PROW) options, and community hubs, based on feasibility, cost, scalability, and user experience.

Provide actionable recommendations by stakeholder role to support faster, more predictable, and more equitable deployment.

Key Findings

Demand Is Present; Charging Access Is the Constraint

The Largest PCC Need Is Concentrated in Multifamily Property Types

Equity Gaps in Charging Access Persist and Should Guide Future Siting and Design

Soft Costs and Process Uncertainty Frequently Determine Speed to Deployment

No Single Solution Fits All PCC Conditions

Equity Considerations Must Guide PCC Charging Deployment

Recommendations for Scaling Solutions

Utilities and Program Administrators

- Publish “Getting Started” toolkits that reduce rework and confusion
- Create a single point-of-contact and clear roles and responsibilities
- Standardize contracting for emerging delivery models
- Treat energization as a critical-path performance metric
- Consider utilizing available utility funding to support ongoing costs

Authorities Having Jurisdiction

- Enforce EV-ready building codes for MFH
- Bundle requirements early to prevent wasted design spend and repeated resubmittals
- Shift from sequential, stage-gated reviews toward more parallel processing
- Improve predictability by limiting vendor count and standardizing packages/product offerings in programs
- Invest in site-screening tools and transparent siting criteria
- Operationalize equity rather than only acknowledging it

Recommendations for Scaling Solutions

Installers/Private EV Charging Providers

- Design proposals to clear the hurdles up front
- Pursue scalable public-private partnership/concession deployments by using standardized template agreements
- Plan for multi-agency constraints in the PROW and reduce iteration cycles
- Support low-income affordability through vendor-administered discount structures
- Make O&M and vandalism mitigation real in the operating plan

Community-Based Organizations

- Use trusted relationships to align siting with community priorities
- Prioritize multilingual outreach and inclusive feedback mechanisms
- Coordinate engagement timing with feasibility

Conclusion

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