

Program Advisory Council Meeting

Q2 2025

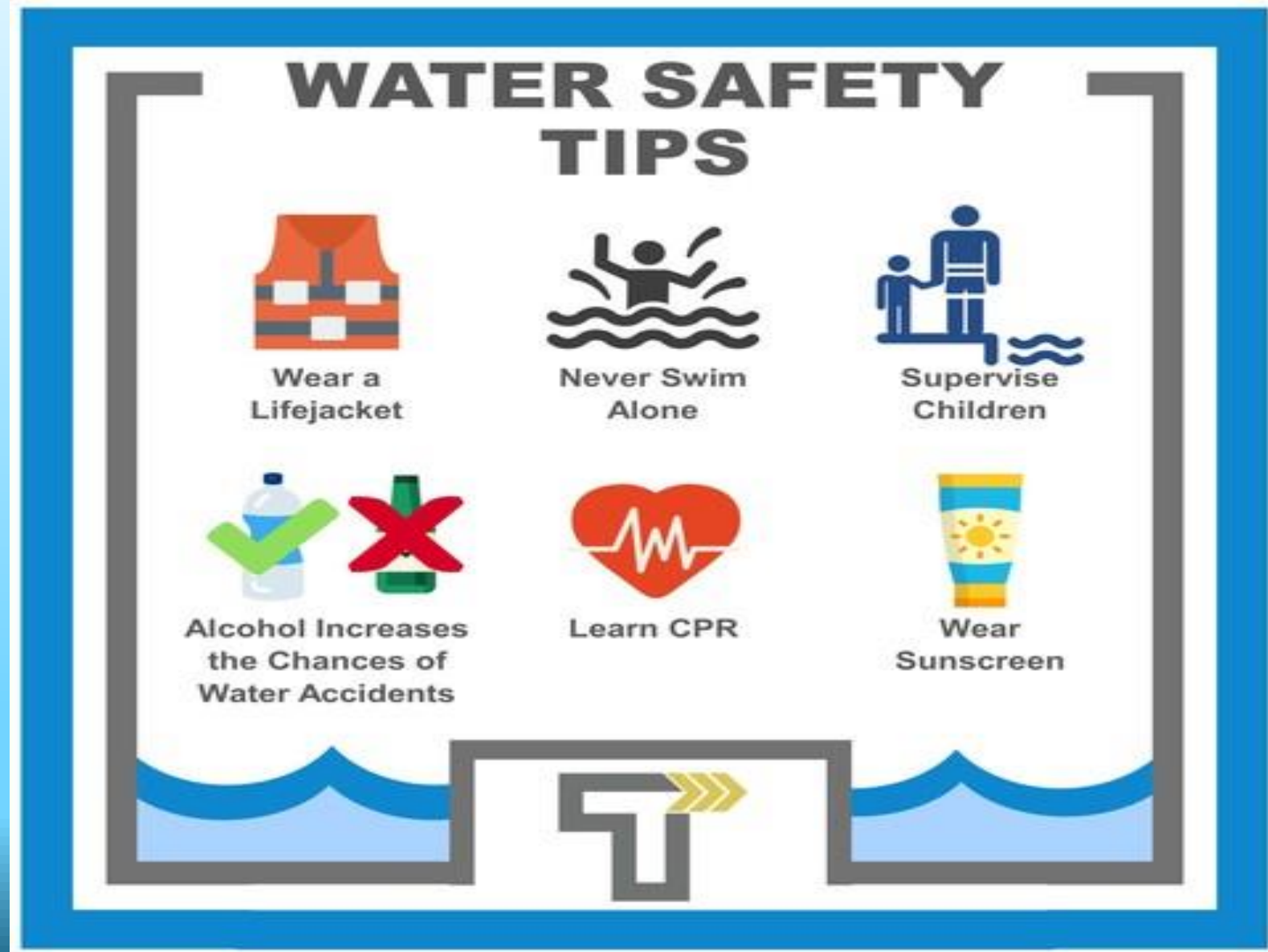
July 24, 2025



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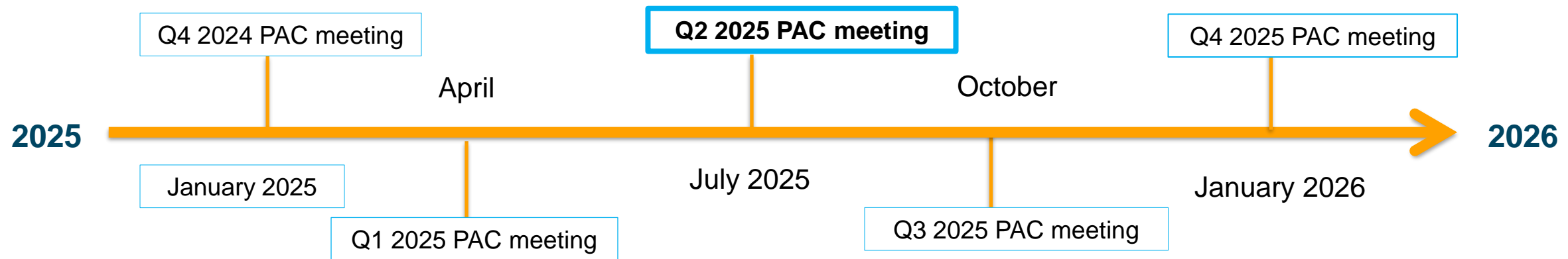
Agenda

Introduction Agenda Safety	1 minute
Meeting Timeline Market Update	3 minutes
EV Good News!	6 minutes
EV Fleet Update	8 minutes
EV Fast Charge Update	4 minutes
EV Charge Schools Update	4 minutes
EV Charge Parks Update	5 minutes
EV Fleet Advisory Services (FAS)	6 minutes
RCS and APC Program Development & LCFS Common App	15 minutes
PG&E Internal Fleet Take Home Program	10 minutes
OEMs	10 minutes
VGI Pilots	7 minutes
Conclusion	1 minute



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



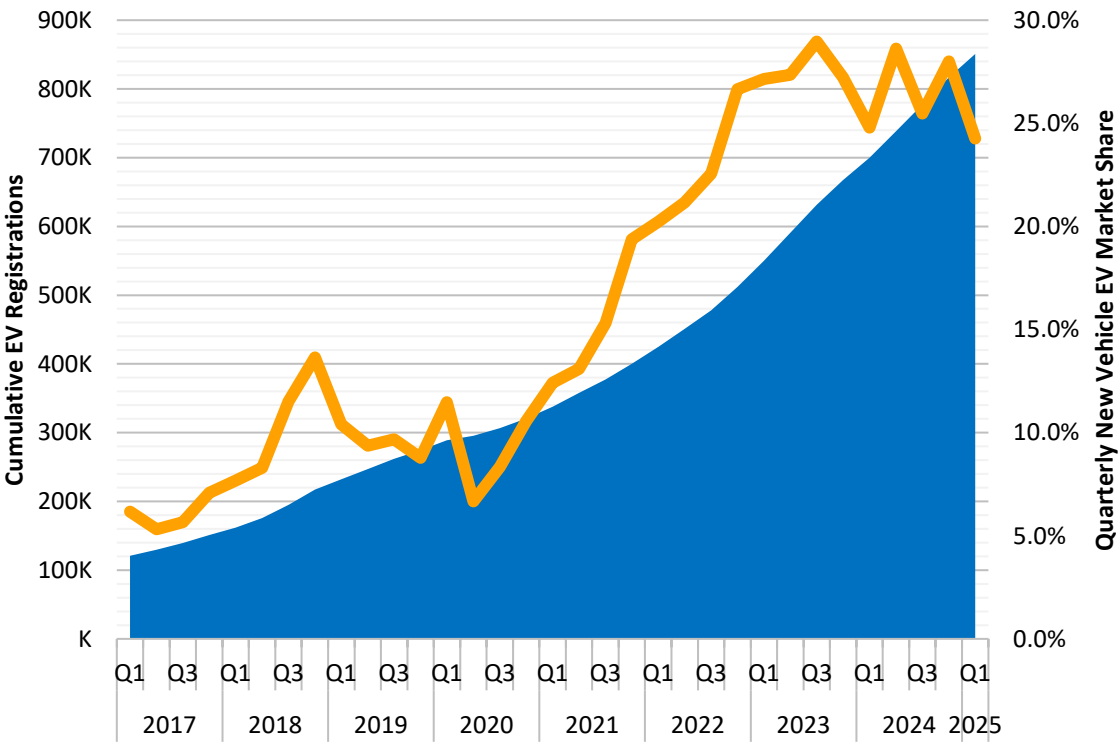


EV Market Update

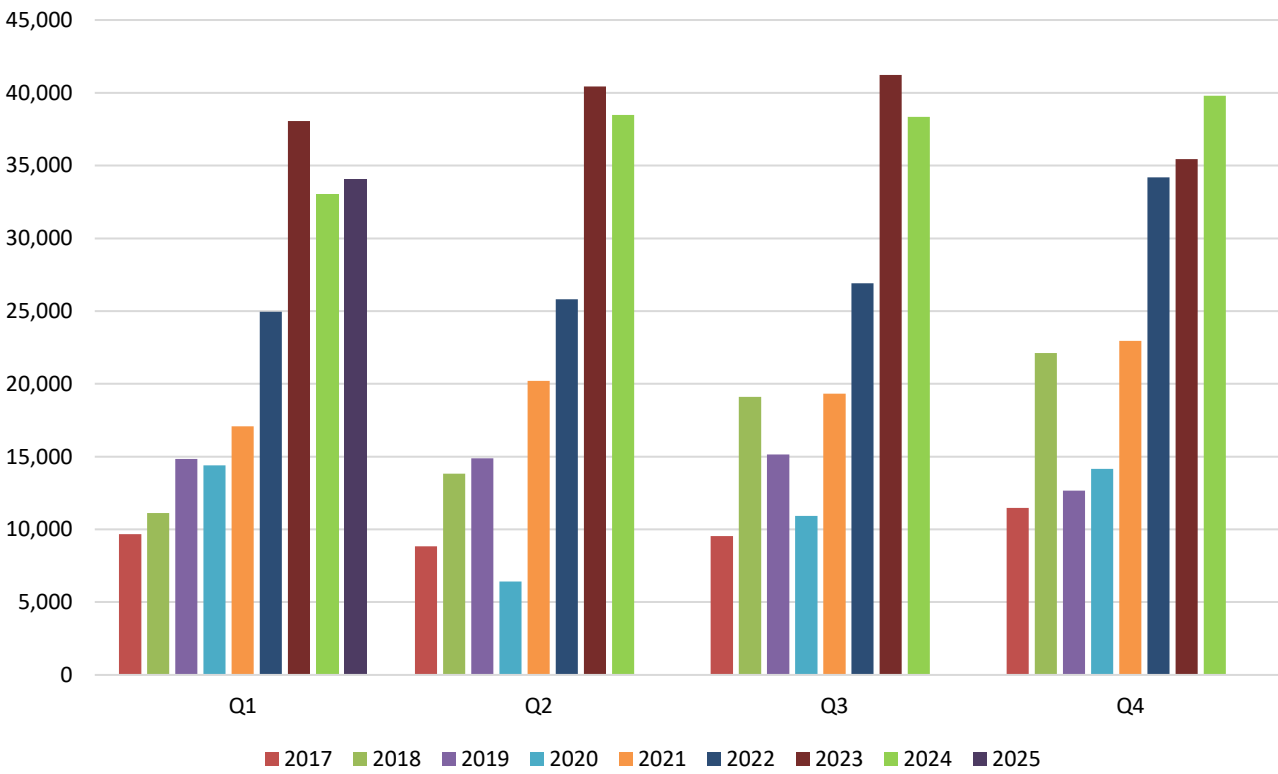
869,052

EVs registered in PG&E service territory through May 2025

Cumulative New EV Registrations PG&E Service Territory



New EV Registrations by Quarter



Source: EPRI, Based on external registration data through Dec. 2024

EV Good News!

Judge orders Trump administration to resume distributing money for EV chargers

JUNE 25, 2025 · 4:50 PM ET

HEARD ON ALL THINGS CONSIDERED

 Camila Domonoske

 3-Minute Listen

+ PLAYLIST

TRANSCRIPT

...



Electric vehicles sit parked at a Tesla charging station in Sausalito, Calif. In 2021 Congress designated \$5 billion dollars to pay for high-speed EV chargers along highway corridors. The Trump administration put a pause on the distribution of that money, which a coalition of states have challenged in court. A judge issued a preliminary injunction ordering the funding freeze be lifted for more than a dozen states.

Justin Sullivan/Getty Images North America

The court order is a **preliminary injunction**, not a final decision in the case itself.

California Attorney General Rob Bonta, who is co-leading the suit, said in a statement he was pleased with the order, while the Sierra Club called it "**only a first step**" toward the full restoration of the funds.

It may be a first step, but it is good news nonetheless

SB 350 Standard Review Projects



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EV Fleet Updates



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EV Fleet Program Update

Status as of 6/30/2025

	Sites	MDHD EVs Committed
Applications	759	-
Viable Contracts ¹	345 ²	6,797
Construction Complete	141	2,923
Activated	122	2,376

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

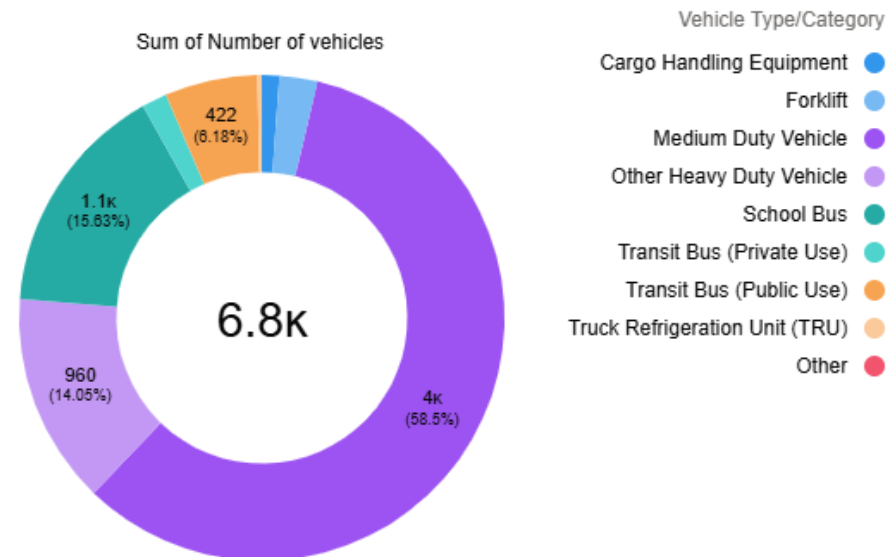
Spend-to-Date	Remaining Funds
\$79.0M	\$157.3M

Lessons Learned/Best Practices

- Program has strong momentum with 110 applications in first half of the year. Due to robust pipeline, EV Fleet is implementing a waitlist for new applications (except transit agencies due to dedicated budget as directed by Decision 18.05.040).
- Transit agencies have been slower to participate in EV Fleet compared to other market segments, leading to an excess of dedicated transit agency budget. The program is continuing to conduct targeted outreach to transit agencies to support electrification.

Public

Viable Contracts: Vehicle Type

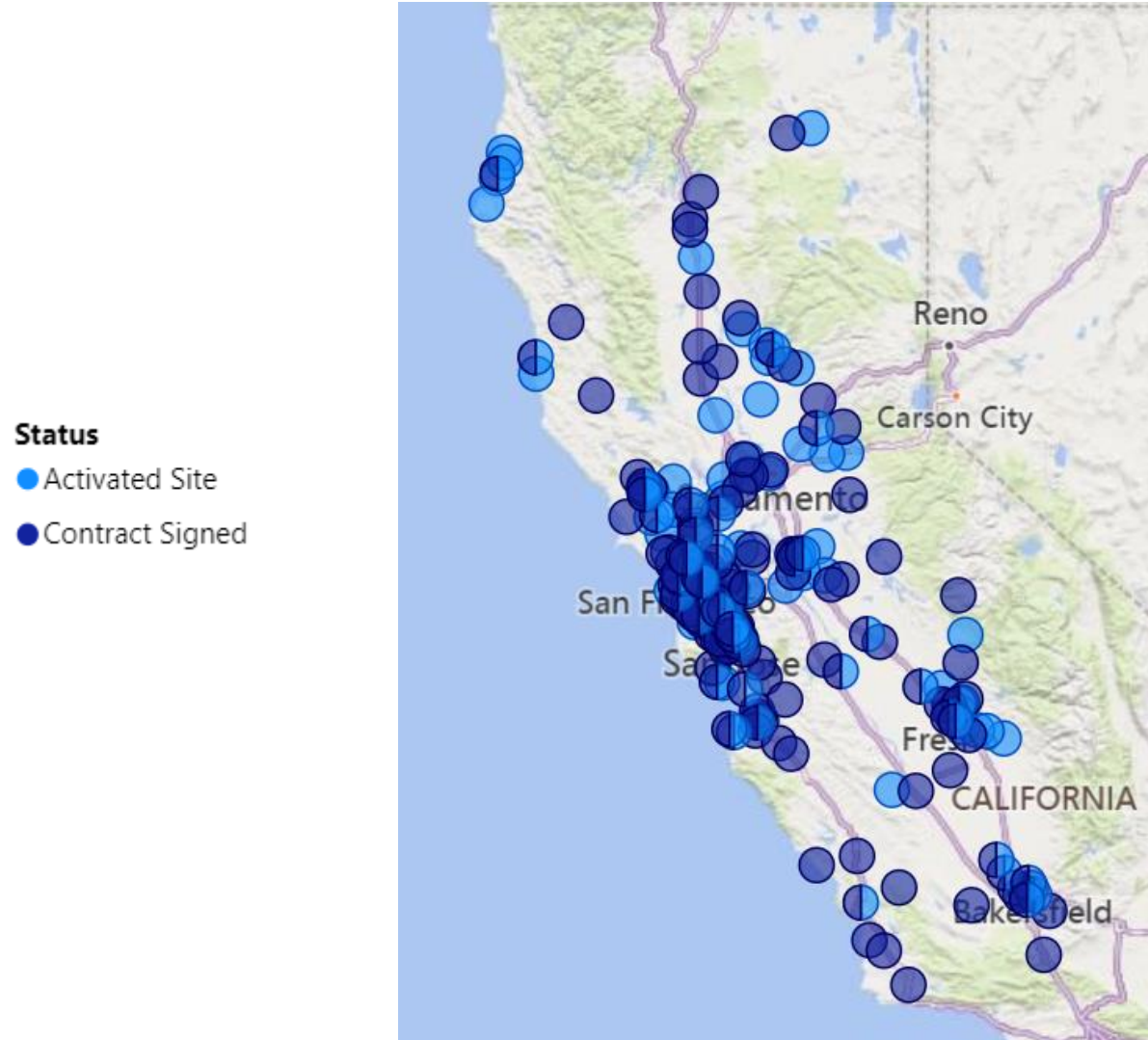


Program Highlights

- Program has exceeded its vehicle target (6,500 vehicles), on track to meet updated site goal of 375 sites
- 154 of the 345 signed contracts **(45%) are in DACs**
- Signed 15 contracts in Q2, supporting 196 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 Construction and Activation

Activated sites and sites in construction by zip code





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 Fast Charge



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EV Fast Charge Program Update

Status as of 6/30/2025

	Sites	Ports
Applications	272	1,225
Contracted Sites ¹	39 ²	204
Constructed	33	164
Activated	32	164

¹Contracted sites counts excludes cancelled projects.

² Does not reflect 2 contracts that are in the process of cancelling.

Program Budget Overview

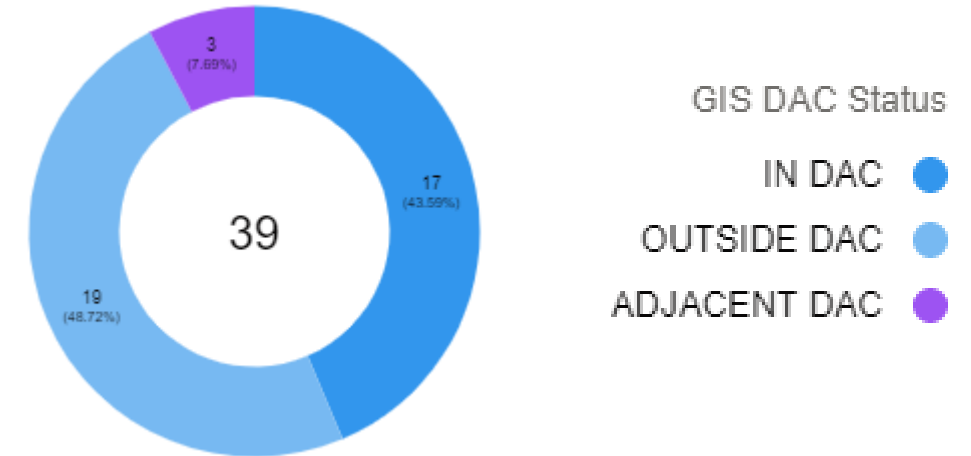
Spend-to-Date	Remaining Funds
\$20.1M	\$2.2M

Lessons Learned:

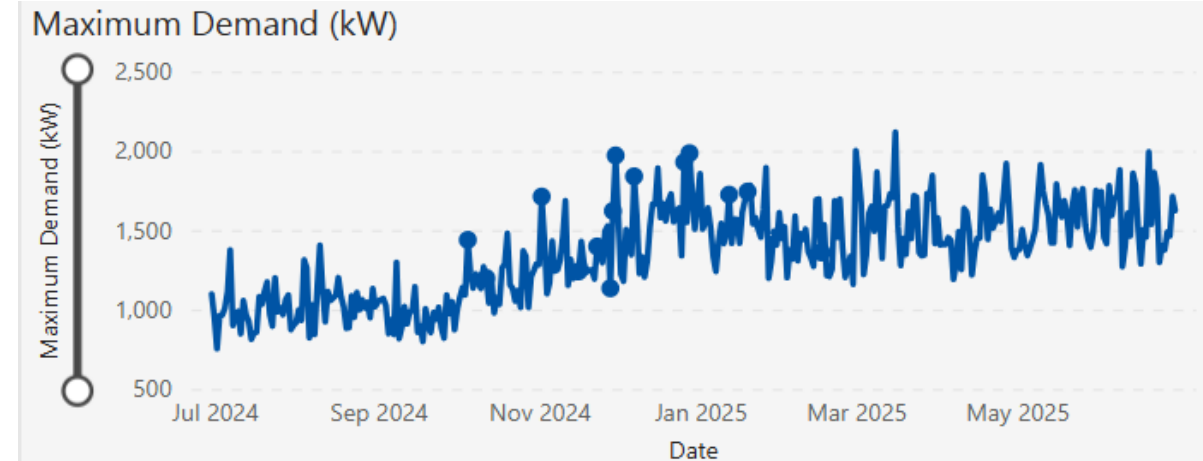
- Higher project costs have led to minimal contingency budget and proactive customer conversations regarding the cancellation of two 'On-Hold' projects.
- As program approaches sunset phase, internal conversations around BTM ownership have kicked-off to determine best approach.

Public

DAC Targets: Signed Contracts



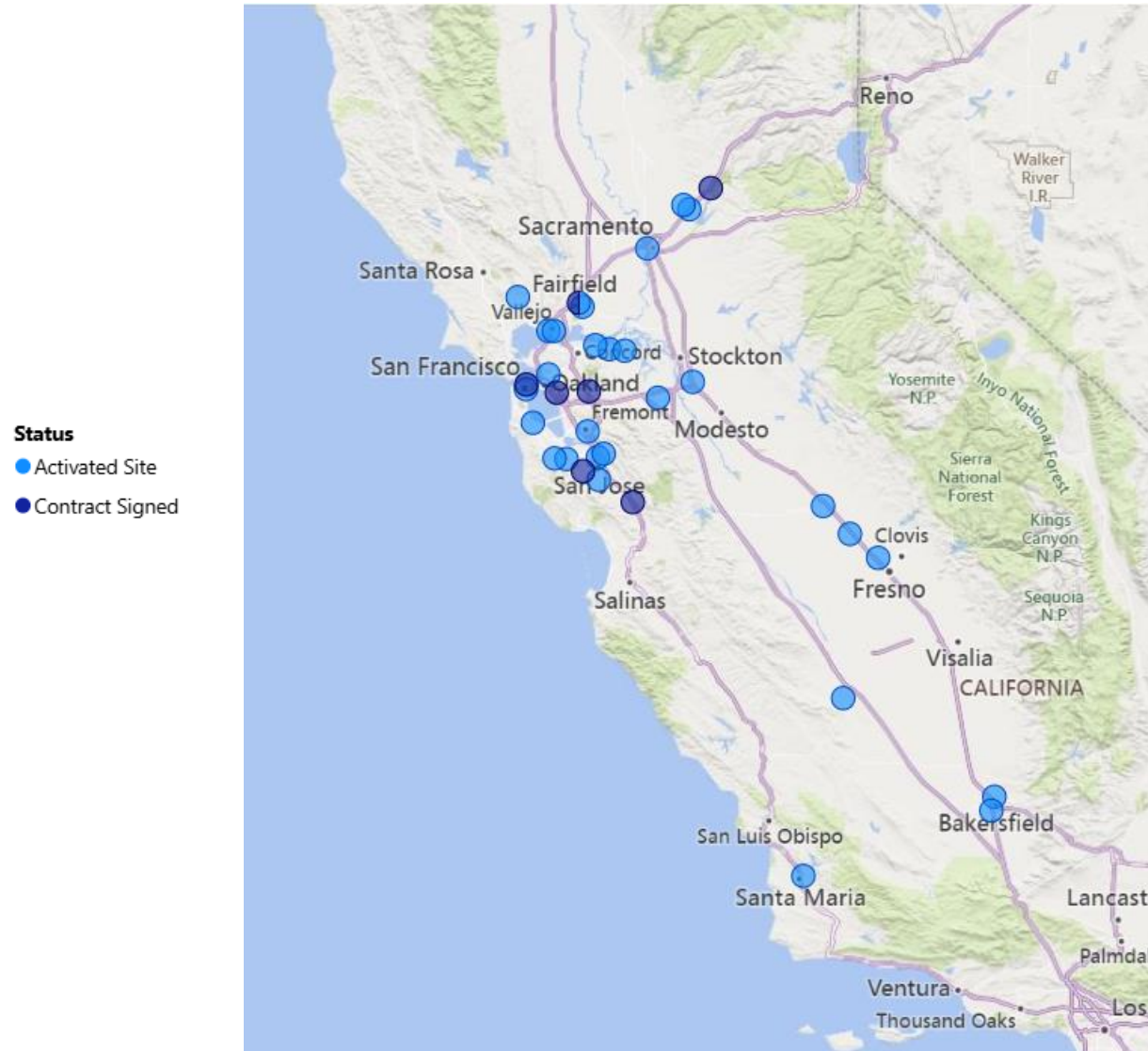
Portfolio-wide Utilization Trends



Source: SRP Evaluation Dashboard

Fast Charge Sites Contracted and Activated

Activated sites and sites contracted by zip code



AB1082 & AB1083 Standard Review Projects



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EV Charge Schools & Parks Update



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Status as of 6/30/2025

	Sites	Ports
Applications	78	468
Contracted Sites	15	90
Constructed	12	72
Activated	12	72

Program Budget Overview

Spend-to-Date	Remaining Funds
\$4.9M	\$875K

Lessons Learned/Best Practices

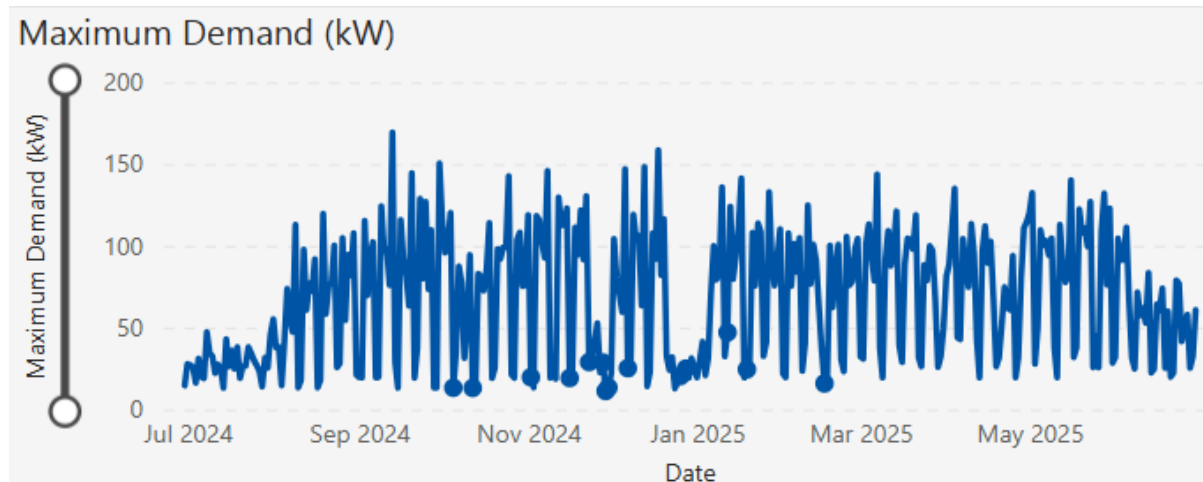
- Summer/school breaks continue to be preferred timeframe to complete construction.
- With program budget getting close to the cap, the remaining sites' construction costs will have increased oversight.

Program Updates

- Final site anticipated completion end of Q3 2025
- EV Curriculum available online to every K-12 school in PG&E territory

<https://www.energizeschools.org/evcurriculumportal.html>

Portfolio wide utilization

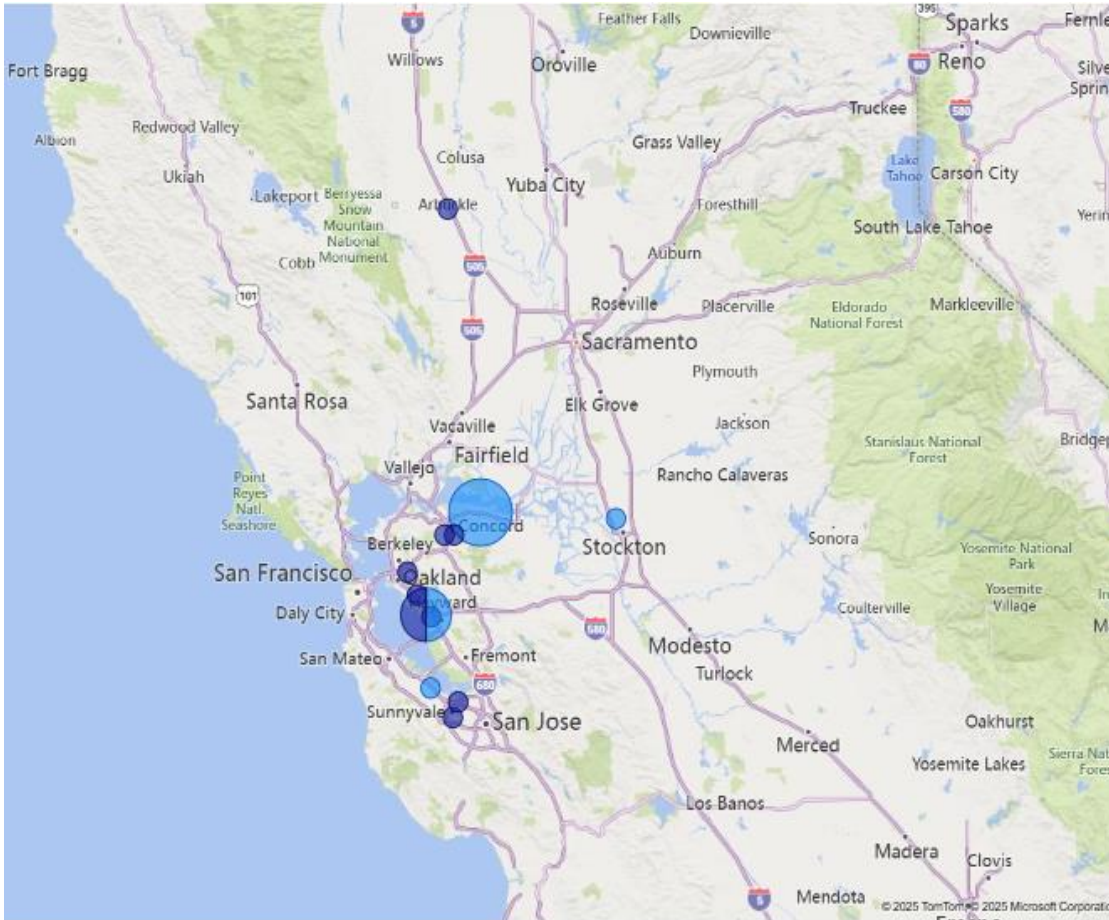


Sites with signed contracts*

DAC Status

● IN DAC

● OUTSIDE DAC



* 3 DAC sites within same zip code

	In DAC	Outside DAC	Total
Contracts	6	9	15
Ports	36	54	90
DAC Percentage	40%	60%	100%



EV Charge Parks Program Update

Status as of 6/30/2025

		Sites	Ports
Applications		131	0
Contracted Sites		3	30
Constructed		0	0
Activated		0	0

Program Budget Overview

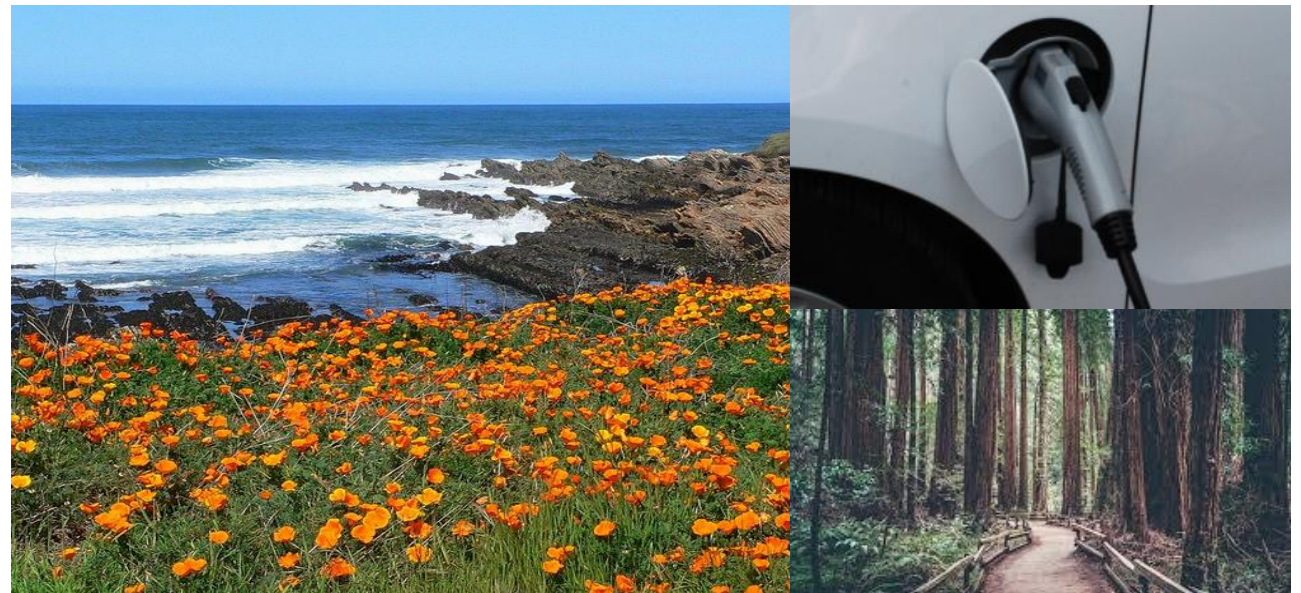
Spend-to-Date	Remaining Funds
\$817K	\$4.7M

Lessons Learned / Best Practices

- EVSP ownership model can reduce costs by eliminating the need to purchase EVSE and shifting O&M responsibilities away from the program.

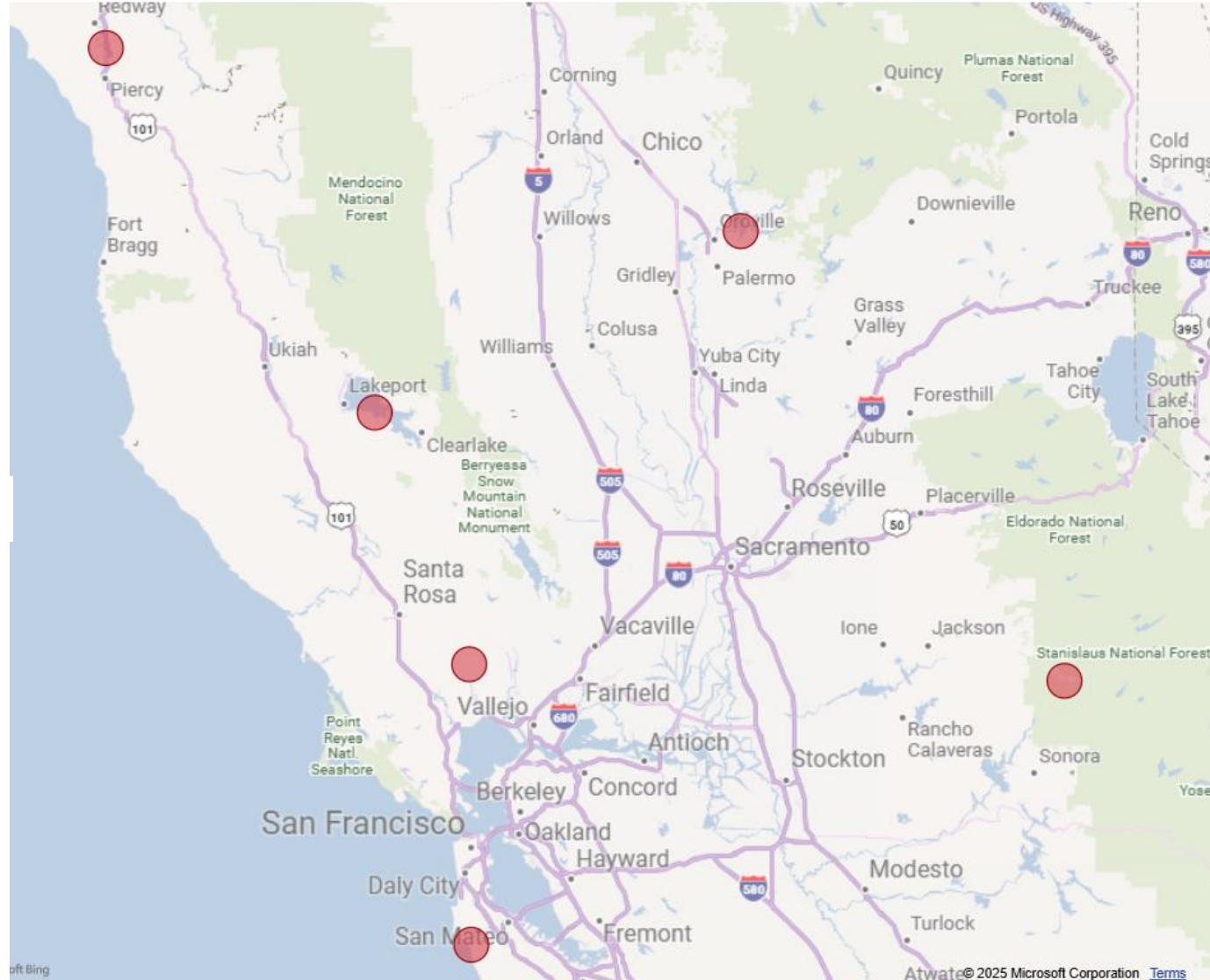
Program Update

- Tier 2 DAC AL approved, allowing for reallocation of DAC funds to support a portfolio of sites that best fits the needs of Parks and park visitors.
- Two addenda executed and last 3 addenda out for signatures with State Parks Dept.
- Filed a Tier 1 AL to confirm installation of DCFC and EVSP ownership of the chargers.
- Program in process of contracting with an EVSP.



EV Charge Parks Sites

State Parks in PG&E Service Territory



Assessment Status ● Proposed Site

EV Fleet Advisory Services (FAS)



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EV Fleet Advisory Services (FAS)

Status as of 6/30/2025

	Total
Applications Received	254
Unique Customers	36

Program Updates

- Program uptake has been slow so far; we are testing new outreach strategies to reach eligible customers:
 - Local governments webinars
 - Small business outreach campaign
 - Chambers of Commerce engagement
 - CBO outreach expected to begin in September
- New tools launching in July:
 - Updated Transportation Electrification Guidebook
 - Fleet Planning Tool to provide customers an electrification plan

Program Budget Overview

Spend-to-Date	Remaining Funds
\$1.57M	\$17.20M

Early Results and Key Findings

- Most popular services so far are Fleet Electrification 101, Basic Capacity Check, Portfolio Capacity Review
- In-house implementation of program has allowed us to save on costs compared to program application
- Program has created platform within PG&E to improve our support of nonresidential EV customers
- Program customer eligibility may be overly restrictive – most services are only for priority customers in underserved communities
- Small businesses do not have much appetite to electrify at this time due to cost and unsupportive regulatory and funding landscape

Additional Program Updates



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New Residential EV Program Updates



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Affordable Public Charging – Program Overview

Provides income-qualified customers access to public EV charging via a reloadable debit card.

Program Overview

- **Audience:** Residential
- **Model:** Prepaid debit card for public EV charging
- **Incentive:** \$50/week for income qualified
- **Timeline:** 2025-2029
- **Status:** In Development

\$28.8M Program budget

Jan '26 Program launch

Eligibility

- Active electric residential customer (SF or MFH)
- Own or lease EV
- Income-qualified: <80% of AMI
- Attest to having limited at home charging

Program Highlights

- Equity component: currently, the program is available only to income-qualified, residential PG&E customers
- Designed to fill a market gap – those without access to at-home charging and lower EV electric rates
- Southern California Edison and San Diego Gas & Electric are running the same program
 - Proposed as joint implementation, though we are looking at a hybrid approach
- Aims to reach 6,600 customers over the course of the program
- Funded by Low Carbon Fuel Standard (LCFS) revenues



Residential Charging Solutions Expansion – Program Overview

Provide eligible customers installation and incentives for panel upgrade or circuit extension.

Program Overview

- **Audience:** Residential
- **Model:** Make Ready EV Charging Infrastructure
- **Incentive:** Up to \$4,000 for a panel upgrade or \$1,000 for a circuit extension
- **Timeline:** 2025-2029
- **Status:** In Development

\$19.3M Program budget

Jan '26 Program launch

Eligibility

- Active electric residential customer (SF or MFH)
- Own or lease EV
- Income-qualified: <80% of AMI

Program Highlights

- Program is an expansion to Residential Charging Solutions Pilot
 - Original: outlet splitters, load-limiting smart chargers
 - Expansion: panel upgrades, circuit extensions
- Program targets low-income customers by reducing total cost of ownership for installing home charging.
- Educate contractors and customers on considering optimization strategies over upgrades.
- Develop Trade Ally Network and after-the-fact rebate.
- Funded by Low Carbon Fuel Standard (LCFS) revenues.

Combining Residential Charging Solutions Pilot and Expansion



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EV Charging Solutions – Program Update Overview

Provide eligible customers concierge service for residential EV charging with installation and rebates.

Program Overview

- **Audience:** Residential
- **Model:** Make Ready EV Charging Infrastructure
- **Incentive:** TBD
- **Timeline:** 2025-2029
- **Status:** In Development

\$25M Program budget

Jan '26 Program launch

Eligibility

- Active electric residential customer (SF or MFH)
- Own or lease EV
- Income-qualified: <80% of AMI

Program Highlights

- Includes all Residential Charging Solutions Pilot benefits and adds incentive for installation
- Includes all Residential Charging Solutions Expansion and adds incentive for EV supply equipment
- Prioritizes EV charging that minimizes costly utility service upgrades.
- Trade Ally Network required to provide best end to end solution to fit customer's need.
- Provide rebates to offset upfront costs to receive EV charging.
- Funded by Low Carbon Fuel Standard (LCFS) revenues



EVCS & APC Program Timelines

One year roadmap	May	June	July	August	September	October	November	December	January '26	February '26
Planning & Design	Planning & Design									
Strategy, Setup & Reviews	Strategy, Setup & Reviews									
Common App Development	Common App Development									
QA and UAT	QA and UAT									
Contractor/Vendor Training	Contractor/Vendor Training									
Launch (Marketing, Website, Application)	LAUNCH!									
Monitor & Report	Monitor & Report									

Residential EV Program Common Application



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The Residential Common Application

The customer experience today:

- Multiple web forms across pge.com and 3rd-party microsites
- Customers need to **re-enter the same qualification information across programs**
- Customers need to piece together what they qualify for individually
- No experience to guide customers to what is best for them

Our goal for the future:

- Simplify the process
- Improve the customer experience
- Maximize program participation

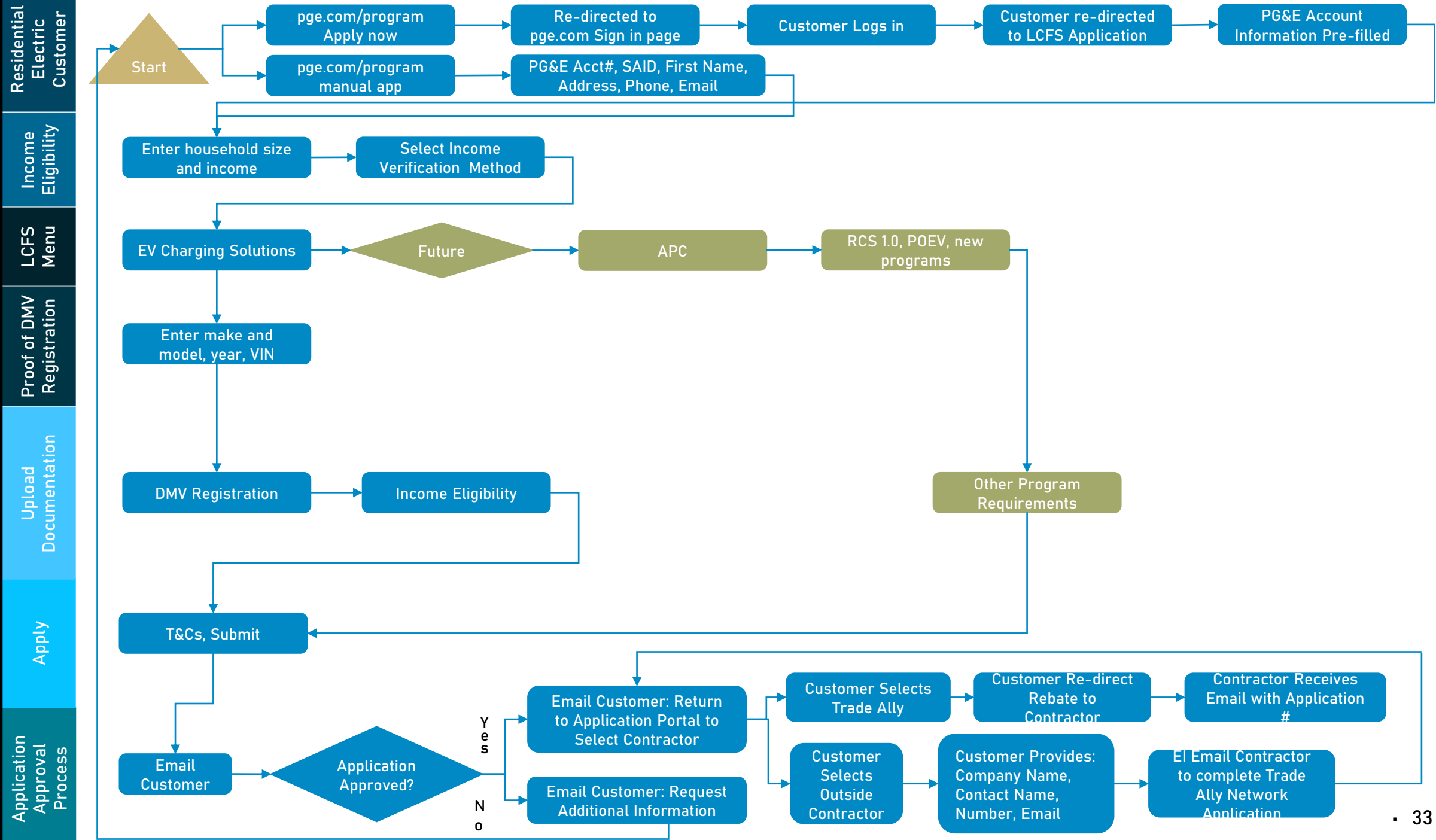


The Residential Program Common Application

A look at the customer experience with and without the Common App

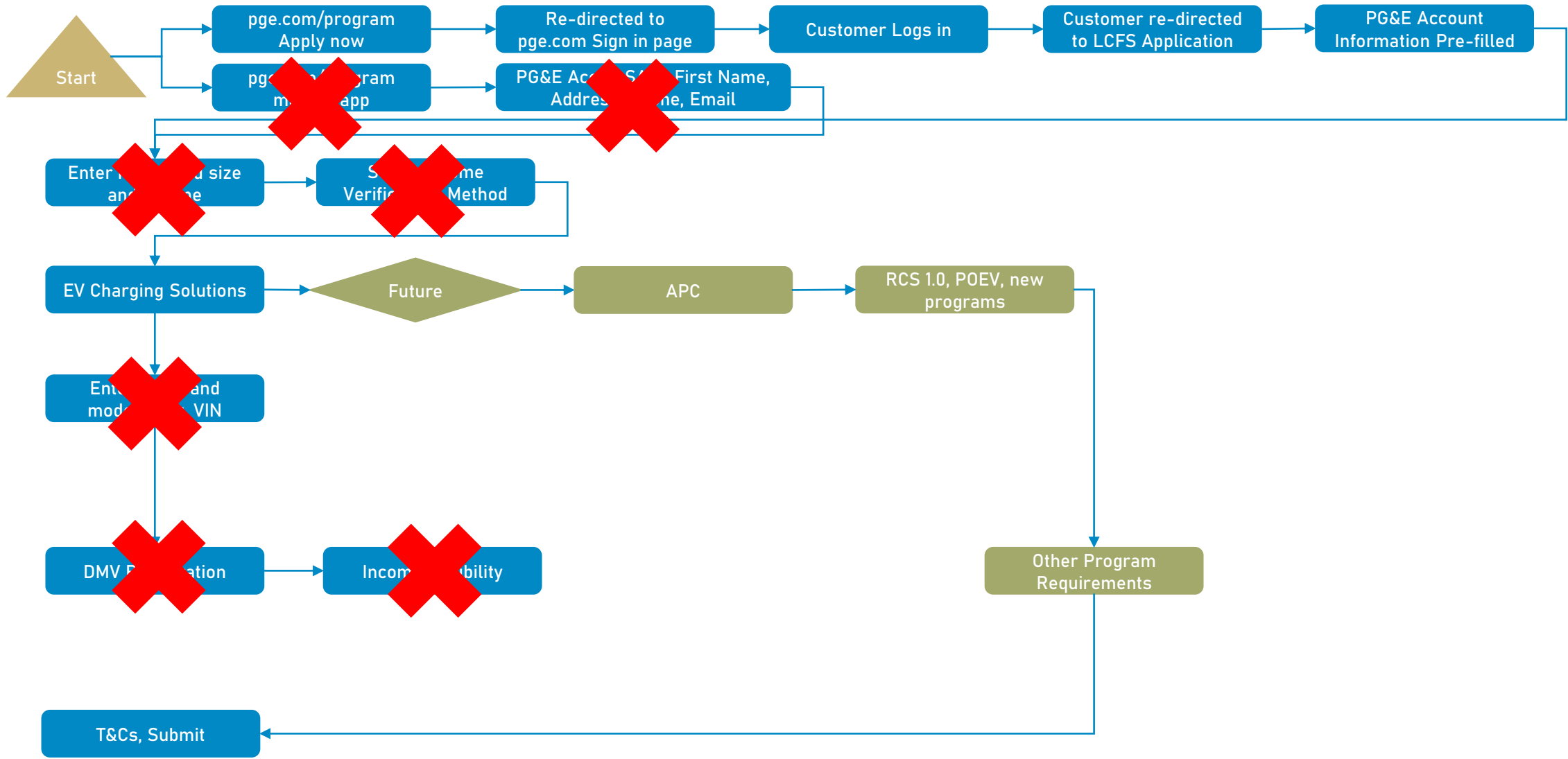
With the Common App	Without the Common App
One clear entry point for all rebates	Multiple forms, websites and rules to navigate
Shared eligibility logic used across all programs	Re-enter the same information for every program
Guided “Help Me Choose” flow	Piece together options across programs and websites
Builds trust with consistent, familiar interface	Inconsistent, fragmented flows across pge.com and 3 rd party websites
Direct PG&E integration, no 3 rd party data sharing	Data passed through 3 rd party systems with more risk, and room for error

LCFS Common Application



LCFS Common Application

Residential Electric Customer
Income Eligibility
LCFS Menu
Proof of DMV Registration
Upload Documentation
Apply





The Residential Program Common Application

A unified experience simplifies access, reduces duplication and sets us up for the future.

Customer Benefits	Operational Simplicity	Future Readiness
<ul style="list-style-type: none">• One login, one application• Guided program selection with "Help Me Choose"• Trusted PG&E experience, no extra accounts or 3rd party portals	<ul style="list-style-type: none">• Shared eligibility logic across programs• Direct PG&E integration, no 3rd party data sharing• Eliminates duplicate workflows	<ul style="list-style-type: none">• Scalable to future programs• Makes incentives easier to access• Builds trust through transparency and consistency

PG&E Internal Fleet Take Home Program



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PG&E Take Home Program – Growth of EVs

PG&E has 2,000+ employees enrolled in the Take Home Vehicle (THV) Program.

*Currently they are in gasoline powered vehicles

You know where
to get gas



In-field or Work
Depot

vs

Year	Employees moving from gasoline vehicles to EVs in the THV Program
2025	25
2026	96
2027	234
2028	172
2029	86
2030	137
Total	750



There are three
options for charging



At Work / Depot



In-field / Public



At Home

- Charging at a PG&E yard is not always feasible; yards may be waiting for charging infrastructure, the chargers installed are intended for employees that park overnight, and many employees may not visit a PG&E yard daily
- Charging at public options can be unreliable, expensive and time consuming

Charging at home is the best solution for PG&E as it avoids down time during business hours and vehicles can be charged overnight when rates are typically lowest. **But how do we fairly compensate our employees for charging their company assets at home?**

PG&E Take Home Program – Reimbursement Pilot

Home Utility Bill

Monthly upload provides source of truth for cost calculations and records



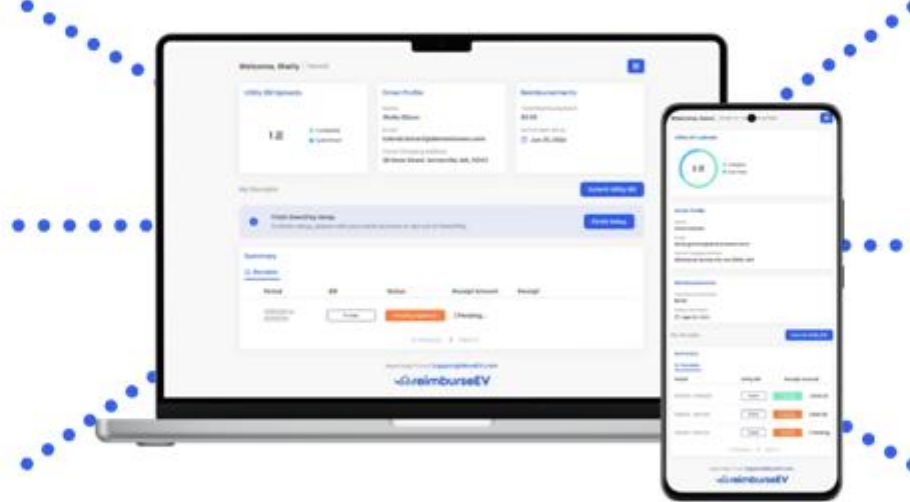
Any Electric Vehicle & Charger Setup

Includes Level 1 chargers



Telematic Data

Provides the most accurate charging information



Accurate Itemized Receipt

Sophisticated accounting includes:

- Time-of-Use
- Tiered Plans
- Solar Offsets
- Subsidies
- more!



Upload Receipt to Concur



Reimbursement Received























PG&E is close to finalizing a MSA with a licensed contractor that will install Level 2 chargers at the homes of our employees

V2X Pilots OEM Agreements



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PG&E V2X Pilots OEM Agreements

	EV OEMs	EVSE Providers
Completed	     	    
In Progress	   	    

PG&E is attempting to work with all players in the marketplace to proliferate the technology as rapidly as possible. Some OEMs and providers are not listed above but are being engaged at a preliminary level.

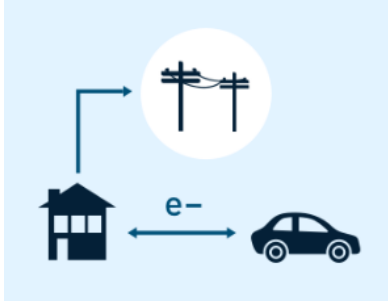
VGI Pilots



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Vehicle to Everything (V2X) Pilots (www.pge.com/vgi)

Pilot #1: Residential

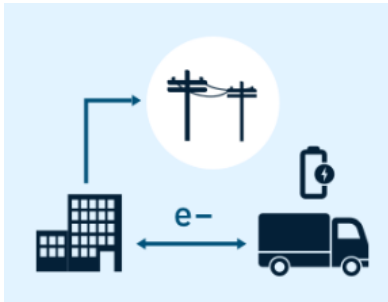


Enrollment: We have 3 customers enrolled. There are still 247 Early Bird Incentives available!

Eligible Equipment:

- Ford 80 Amp Charge Station Pro and Sunrun Home Integration System paired with the Ford F-150 Lightning
- GM Energy PowerShift e1.19 and V2H Enablement Kit paired with the Chevrolet Silverado EV, Equinox, or Blazer, **GMC Hummer EV** or Sierra, or Cadillac **OPTIQ**, **VISTIQ**, **ESCALADE IQ**, or LYRIQ (**Bolded models are new additions!**)

Pilot #2: Commercial

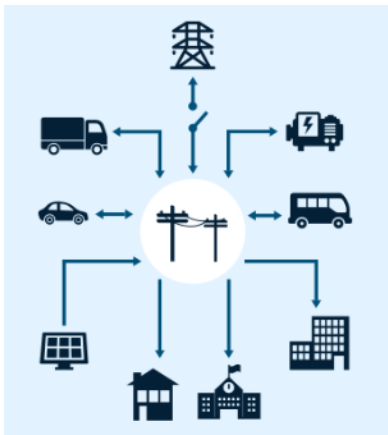


Enrollment: One customer with 74 chargers enrolled and able to export.

Eligible Equipment:

- Tellus Power bidirectional chargers paired with BYD-RIDE School Buses
- Micro Bird and Blue Bird school buses paired with the Borg Warner RES-DCVC60-480 charger

Pilot #3: Microgrids



Phase 1 - Testing Cohort / Redwood Coast Airport Microgrid:

- Islanded test of Frequency Control Scheme for bidirectional chargers successfully completed
- Estimated completion of Phase 1 Q4 2025

Phase 2 – Incentive Cohort

- Open enrollment began Q4 2024

Eligible Equipment:

- Nissan Leaf paired with Fermata Energy FE-20

Conclusion



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