Program Advisory Council Meeting
Q4 2025

February 4, 2026

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Agenda

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

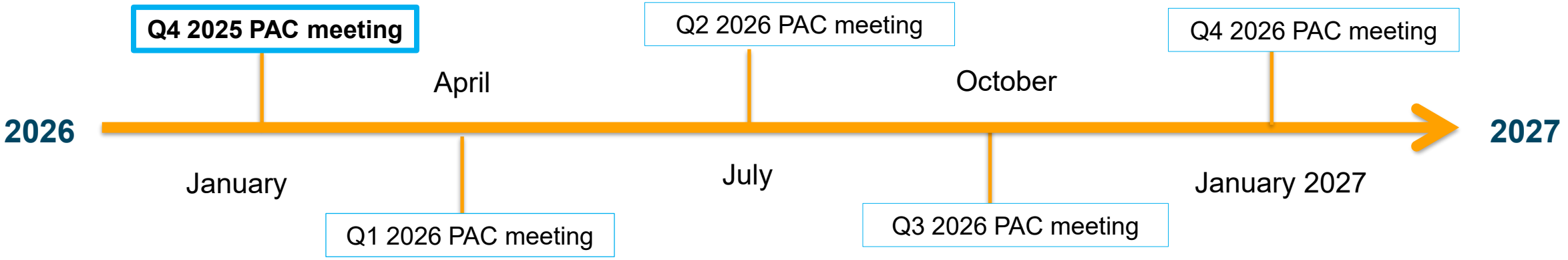
Safety


Winter Weather
Checklist
Maintain heating equipment with annual cleanings
Insulate your home by installing Storm Windows or adding Plastic covering
Dress in several layers of lightweight clothing
Wear waterproof boots to keep warm and dry and maintain your footing
Bring pets indoors during winter
Avoid black ice on the roads by looking for a slight sheen on the surface of the road
Listen to the news or the national weather service for critical info

Clean Energy Transportation Program Advisory Council Meetings

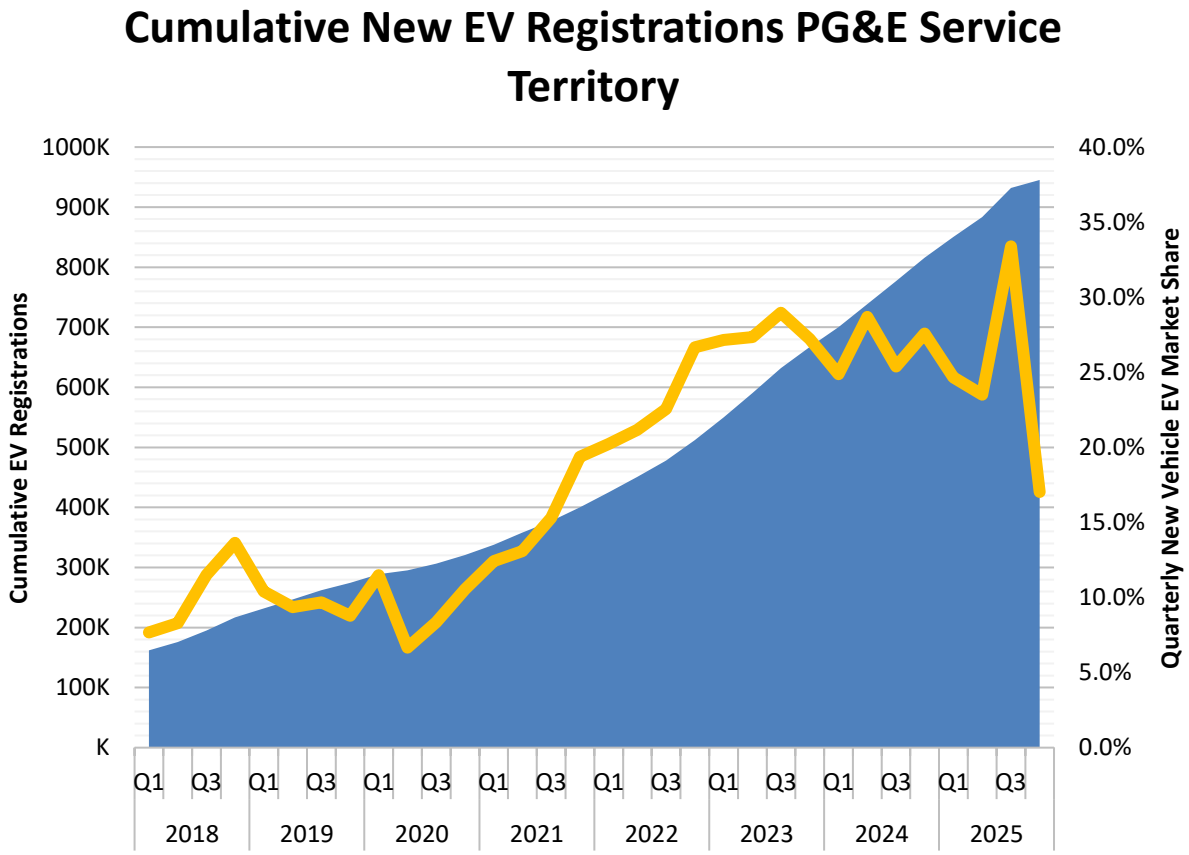
Overview

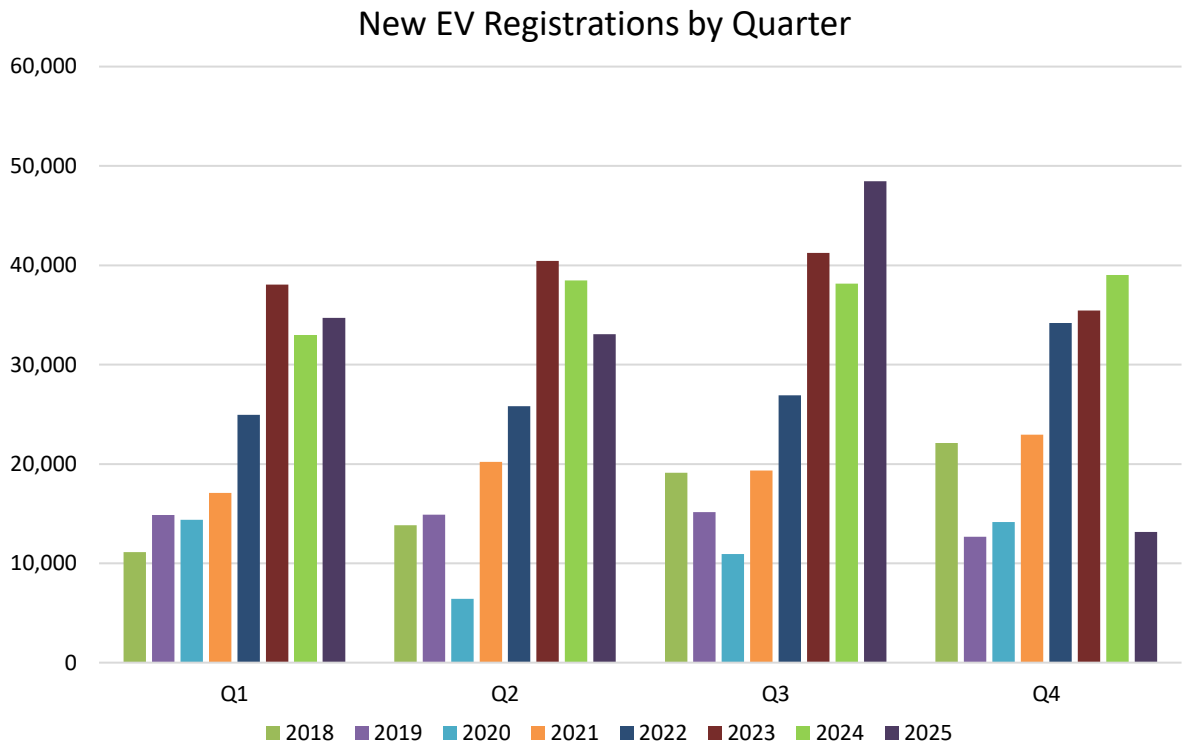
- PG&E has expanded our efforts on transportation electrification (TE) with several filings, pilots and programs in progress
- CPUC has directed PG&E to consult a Program Advisory Council (PAC) in the development of key TE pilots and programs to gain feedback from industry stakeholders
- This platform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



EV Market Update

945,479 EVs registered in PG&E service territory through November 2025

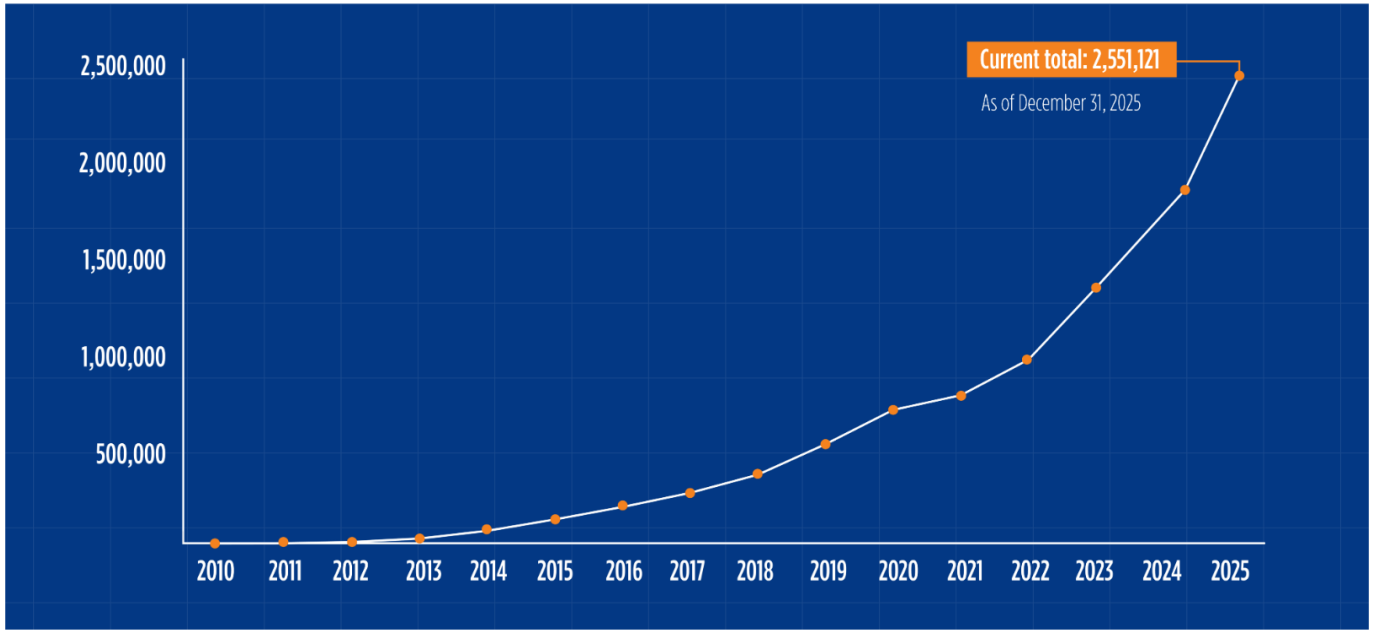




Source: EPRI, Based on external registration data through November 2025

EV Good News!

Zero-Emission Vehicle Sales in California



Source: California Energy Commission, New ZEV Sales Dashboard, December 2025

In Q4 2025, Californians purchased **79K EVs**, representing 18.9% of new car sales. During this timeframe, California surpassed **2.5 million** new EV sales.

California Governor's January 9, 2026 proposed budget includes a proposed **$200 million** light duty EV purchase incentive program.

SB 350 Standard Review Projects

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EV Fleet Updates

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EV Fleet Program Update

Status as of 12/31/2025

	Sites	MDHD EVs Committed
Applications	813	-
Viable Contracts[1]	400[2]	7,495
Construction Complete	182	4,172
Activated	153	3,883

[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.*

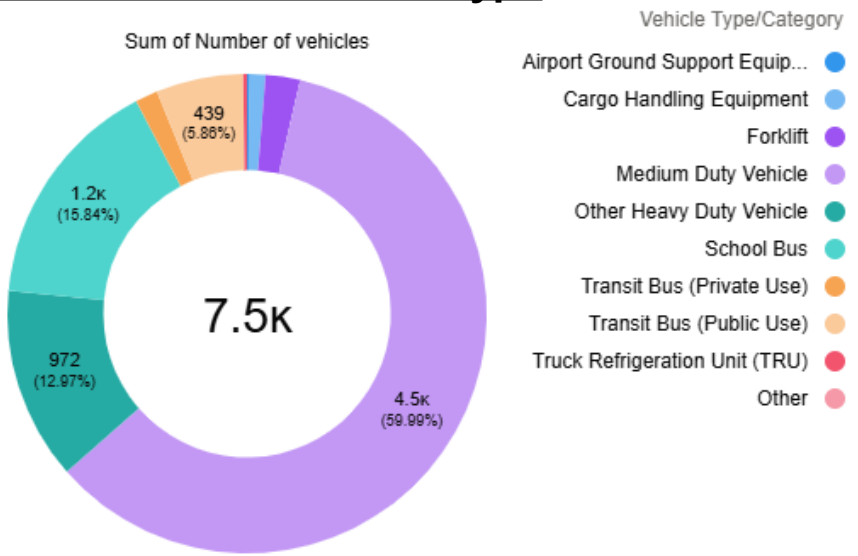
Program Budget Overview

Spend-to-Date	Remaining Funds
$89.4M	$146.9M

Lessons Learned/Best Practices

- Transit budget modification was approved by the CPUC on January 22 – reduces minimum spend from 15% to 10% of the infrastructure budget, enabling EV Fleet to reallocate uncommitted transit budget to waitlisted customers in other sectors after 6/30/26.
- CPUC Decision 25-12-005 removed the vehicle purchase requirement for Funding Cycle 0 programs. EV Fleet plans to use this change to enable transit opportunity charging sites that are not directly procuring vehicles.

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
- 177 of the 400 signed contracts **(44%) are in DACs**
- Signed 95 contracts in 2025, supporting 1,200 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

EV Fleet Program Update

Vehicle-to-Port Ratio for CaaS

- D.25-12-005 states: *"For the purpose of attributing vehicles electrified at charging-as-a-service sites where customers are not directly purchasing vehicles, the IOUs shall consult with their third-party evaluator and Program Advisory Councils (PACs) to determine an appropriate vehicle-per-port ratio."*
- EV Fleet does not have any applicable CaaS sites in its application pipeline or on the waitlist, and is not anticipating supporting new CaaS sites before the program sunsets.
- Therefore the program is not proposing a vehicle-to-port ratio for CaaS sites.

Vehicle Attribution for Transit Opportunity Charging

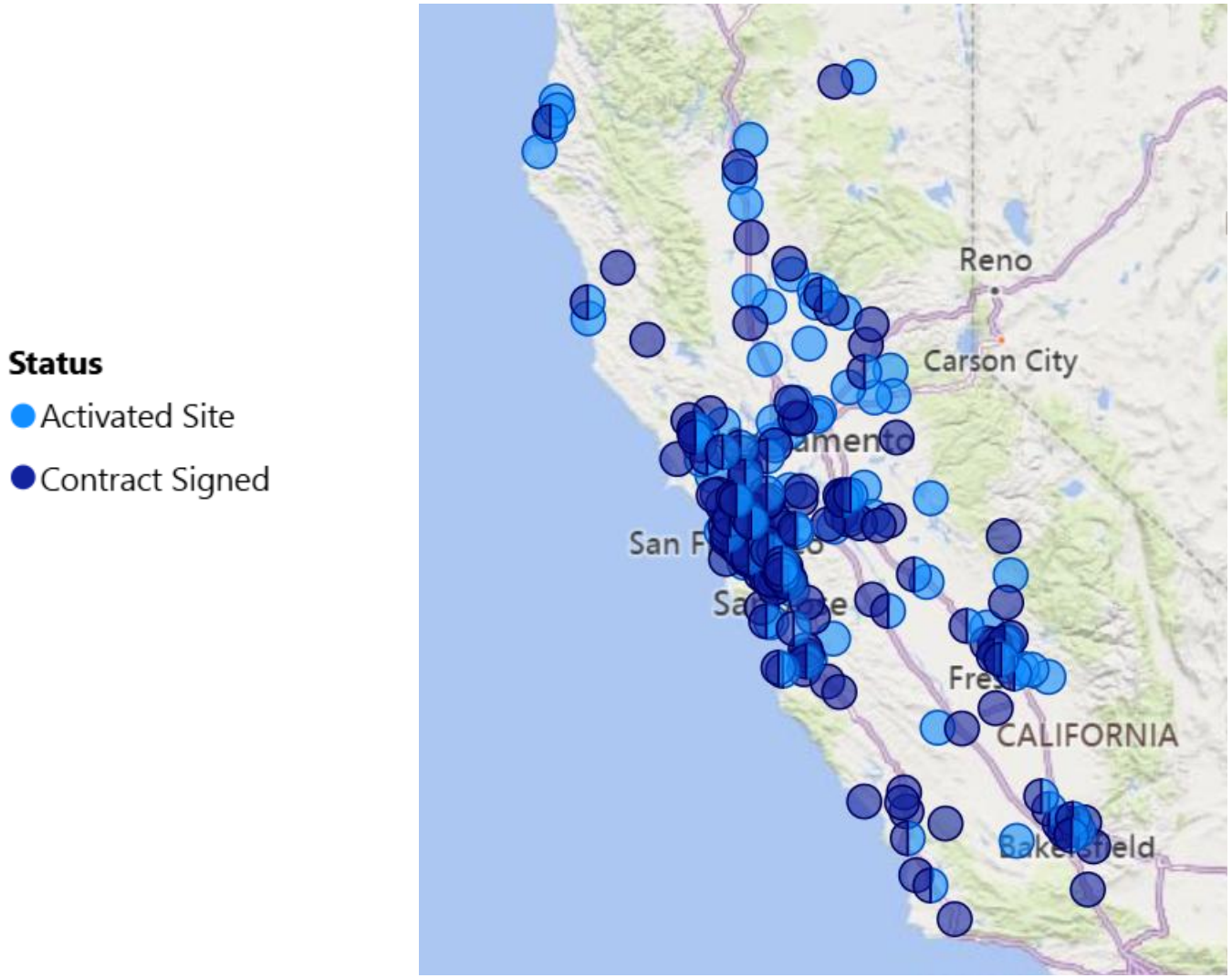
- The removal of the vehicle purchase requirement enables EV Fleet to support transit on route charging sites.
- EV Fleet is anticipating up to ten on route charging projects.
- PG&E is proposing the following vehicle attribution method for these sites:

Number of MDHD EVs that will be supported by the site over the next five years.*

*Five-year window aligns with EV Fleet's standard vehicle deployment timeline for all projects.

EV Fleet Construction and Activation

Activated sites and sites in construction by zip code



EV Fast Charge

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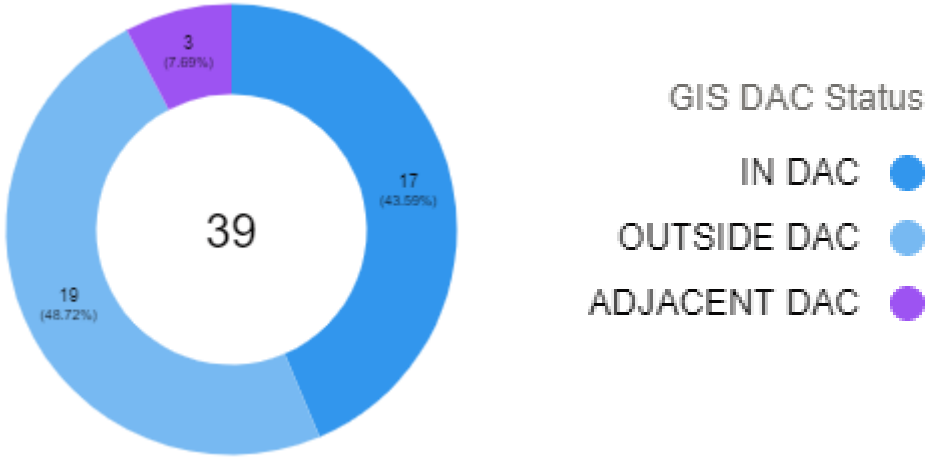
EV Fast Charge Program Update

Status as of 12/31/2025

	Sites	Ports
Applications	272	1,225
Contracted Sites[1]	39[2]	204
Constructed	36	184
Activated	32	168

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

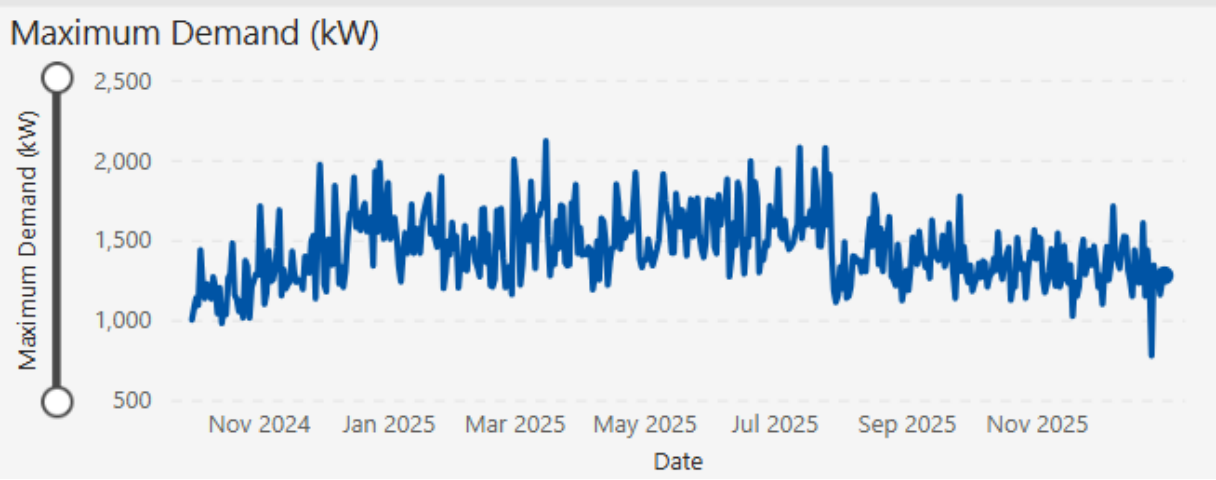
DAC Targets: Signed Contracts



Program Budget Overview

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

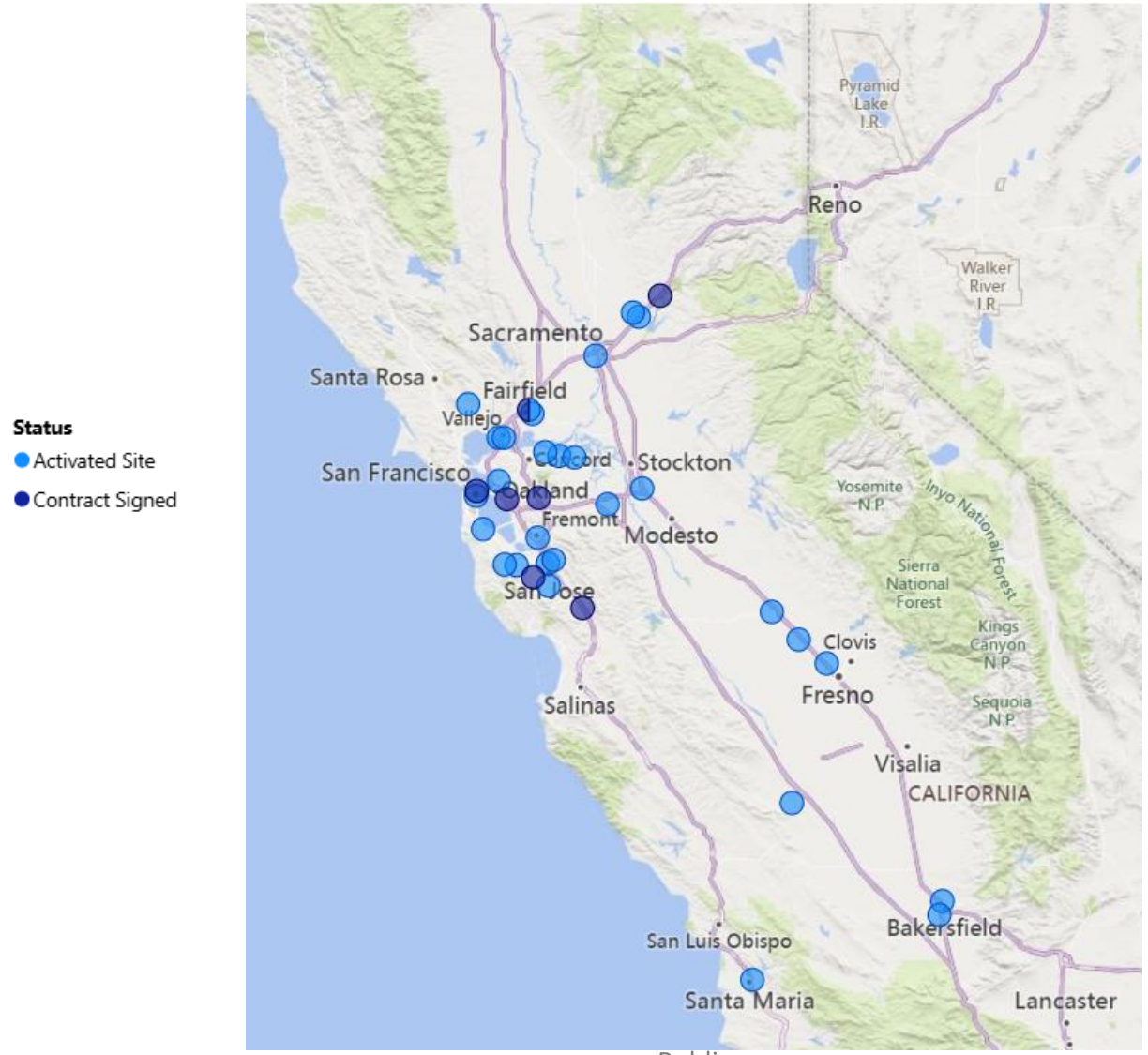
Portfolio-wide Utilization Trends



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 12/31/2025

		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	$4.4M

Lessons Learned / Best Practices

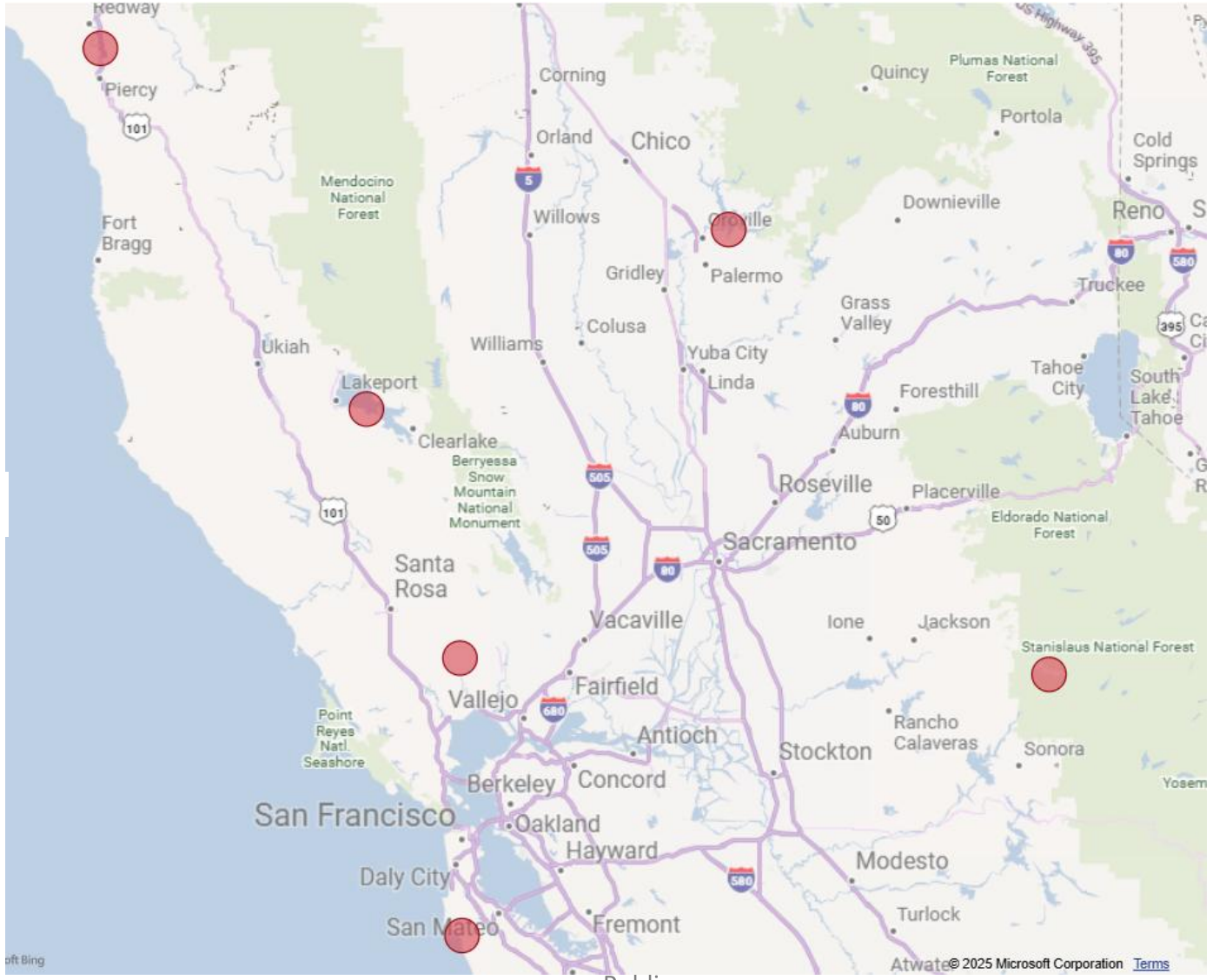
- State Fire Marshal permitting process requires a minimum 8-week waiting period before reviewing plans, increasing the permit cycle time.

Program Update

- Program executed EVSP agreement with vendor.
- Defined the Right of Entry (ROE) process with Parks Dept.
- Calaveras Big Trees project in the final phases of permitting.
- Half Moon Bay project to be reviewed by the City of Half Moon Bay's Community Development Dept. for permitting instead of Costal Commission.
- Remaining 4 sites in waiting queue for State Fire Marshal permitting.

EV Charge Parks Sites

State Parks in PG&E Service Territory



Additional Program Updates

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EV Advisory Services (EVAS)

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EV Advisory Services (EVAS)

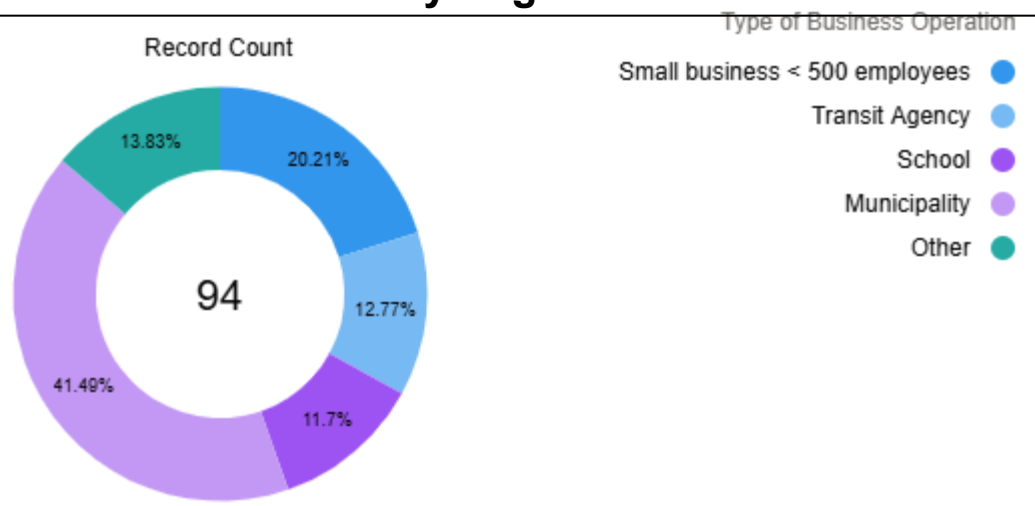
Status as of 12/31/2025

Program to-date	Total
Sites Served	383
Unique Customers	90

Program Budget Overview

Spend-to-Date	Remaining Funds
$2.98M	$15.79M

Customers Served by Segment



Program Updates

- Current iteration of program will sunset EOY 2026 as new TEF Technical Assistance Program ramps up – same offerings but expanded eligibility
- Initiating research into Rule 29 customers to better understand how Advisors can support throughout energization process
  - Focused on ways to reduce attrition and decrease customer cycle times

Lessons Learned and Best Practices

Service application readiness is a major pain point for many EV infrastructure projects

- Program participants are relying on EV Advisors for support in preparing to apply for service
- Capacity reviews, site planning, and navigating application nuances/requirements have been important program offerings

LCFS Updates - BtM and Optimized Charging

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Non Res BTM Infrastructure

Program Goals: Reduce the upfront costs of installing EV charging, supporting EV adoption by (1) reducing the TCO for fleets and (2) improving access to public charging

$30M

Rough budget

180

Estimated site participation

2

# of active years

	Fleets & Public/Shared Charging
Description	Provide incentives to reduce the cost of EV charger installation at non-residential sites by covering a part of the behind-the-meter (BTM) costs. EV Advisory Service will leverage the BTM incentive and Rule 29 (grid connection incentive to provide comprehensive solution to reduce installation costs) to help customers navigate the entire electrification process.
Objective	Increase charger deployment: • Reduce the upfront costs of installing EV charging, improving TCO (fleets) and decreasing costs for public/shared charging • Reduce the number of funding sources needed per-customer • Providing % of funding upfront rather than a fully after-the-fact rebate
Incentive Structure	• Non-equity sites: 50% of BTM costs covered, up to $200k incentive • Equity sites: 75% of BTM costs covered, up to $300k incentive • Equity = MDHD or public/MFH charging located in equity communities • Milestone incentive payments: up to 50% at 100% CD; remainder at project complete. • Considering disallowing Fortune 1000 companies from participation and adding a per-customer incentive cap.
Key Metrics	• Net Margin (cost vs revenues) by site/sector/type – identify and encourage which sites are most likely to produce downward rate pressure. • Number of sites, ports, and vehicles supported • Number of customers at each step of the process (i.e. application, contract signed, first incentive milestone, project completion) and cancellation rates • Evidence of incentive's influence on project execution

Res Optimized Charging

Program Goals: (1) Leverage EVs as grid assets to reduce upstream infrastructure costs and make charging an EV more affordable (2) Offer new EV customers a short term, higher incentive to increase EV adoption.

$30M

Rough budget

50k

Estimated EV participation

2

# of active years

	Existing EV Customers with L2 Charging	New EV Customers
Description	Monthly bill credit for participation in optimized charging; target customers in high EV adoption and grid constrained areas.	Short-term, higher incentive to NEW EV Customers to increase EV adoption and participation in optimized charging. After a set period, the customer will transition onto the standard incentive amount.
Objective	• Shift or throttle EV charging to align more closely with localized grid needs without compromising customer charging needs or preferences • Monthly incentive reduces the customer cost to fuel their EV	Same as "existing EV customers" plus: • Create bundled offers with OEMs (e.g. Low cost lease + Optimized Charging incentive) • Understand how these bundled offers influence purchasing decision
Incentive Structure	• Monthly bill credit for participation in the program ($15/month) • Higher incentive for equity customers ($25/month)	• Short-term higher incentive ($30/month) • Customer will transition to standard incentive amount
Key Metrics	• NPV of grid investment deferral - cost to implement optimized charging • Customer satisfaction / Net Promoter Score • Conversion rate by channel • Enrollment metrics	Same as "existing EV customers" plus: • Impact of incentives on customer purchase decision • Sales impact by OEM

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:** 2022-2026
- **Status:** open to applications

$86.6M Program budget

Feb ’23 Program launch

Eligibility

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

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
- Southern California Edison and San Diego Gas & Electric are running the same program
- Third-party implemented (Center for Sustainable Energy)

Pre-Owned EV Rebate Program – Update

Status as of 12/31/2025

Total Applications Submitted	28,614
Total Rebates Paid	22,590

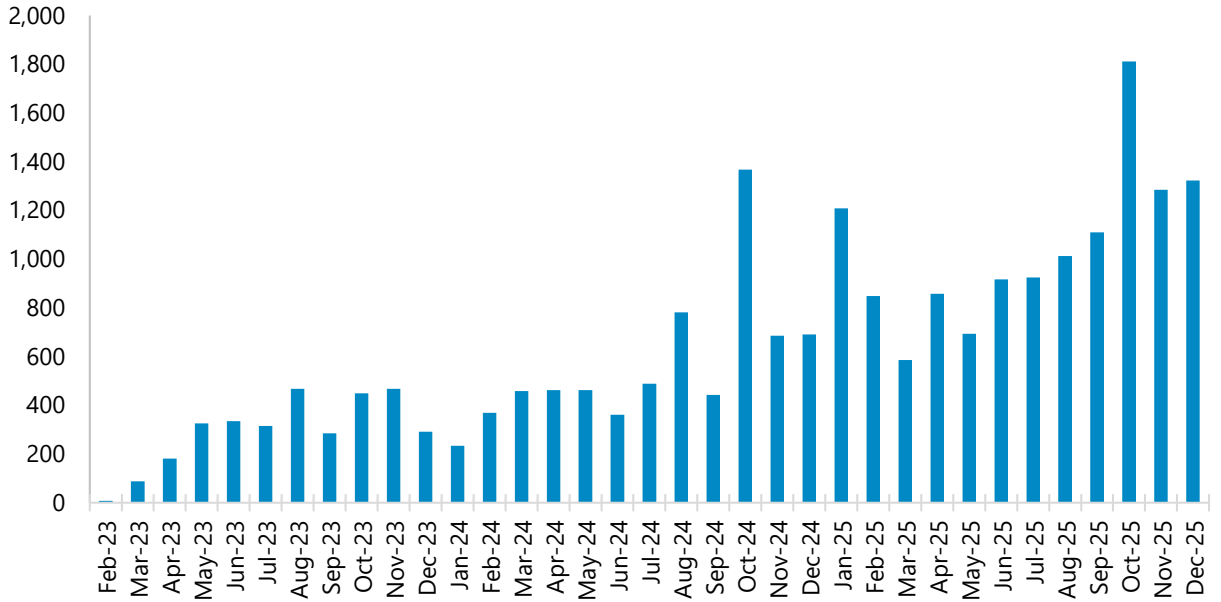
Program Budget Overview as of 12/31/2025

Spend-to-Date	Remaining Funds
$62.4	$24.2M

Lessons Learned/Best Practices

- 60% of Rebate Plus recipients said that the POEV was essential to their decision to purchase or lease an EV
- EV incentive market appears fickle and unreliable to consumers
  - Elimination of Federal Tax Credit
  - Lack of State-level alternatives
  - Uncertainty surrounding DCAP/CC4A funding

Rebates Paid Over Time (Feb 2023 – Dec 2025)



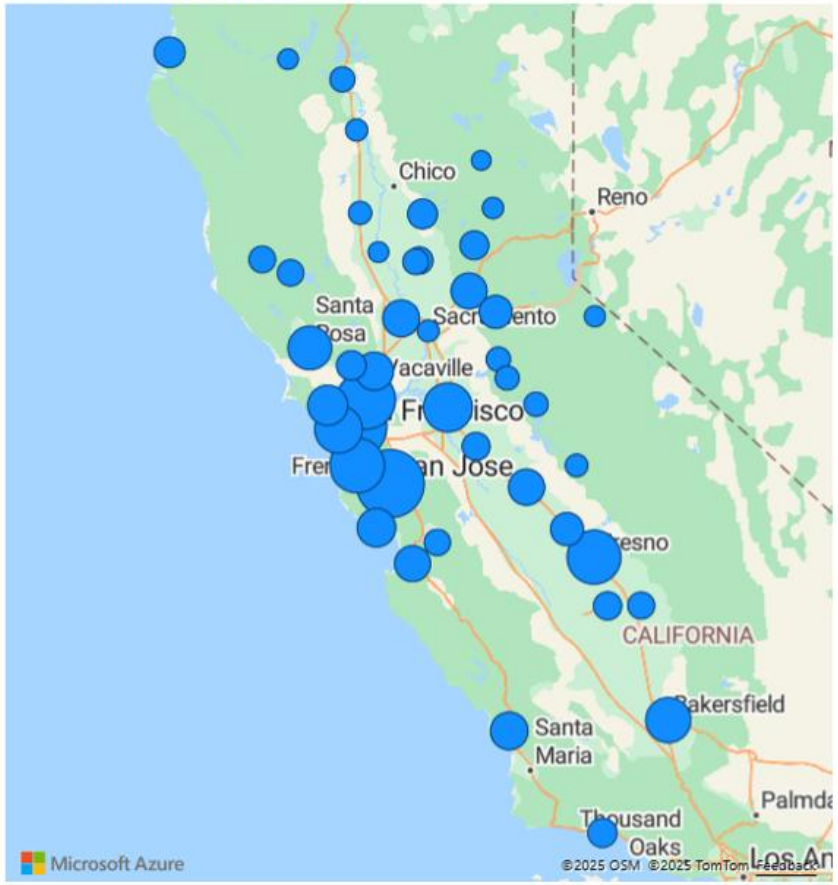
Program Highlights

- 2025 saw higher than anticipated program participation
- Income qualified rebates made up 54% of total volume (up from 39% in 2024)
- POEV plays a pivotal role within our residential EV strategy and portfolio as we prepare to launch our Affordable Public Charging and Residential EV Charging Programs

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 needs 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 to file Tier 2 Advice Letter by early February to request additional rebate funds.
  - No additional program changes will be proposed in hopes to expedite review process.
- Response needed by April 1st, 2026 to avoid disruption to program operations.
- If rejected, or not approved by then, PG&E will provide notification to customers 30 days ahead of forecasted funding shortfall that the program is to be paused to new applications.

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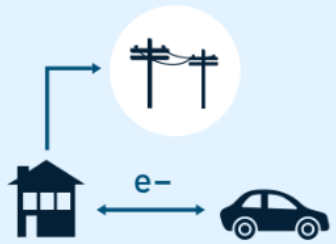
Vehicle to Everything (V2X) Pilots (www.pge.com/vgi)

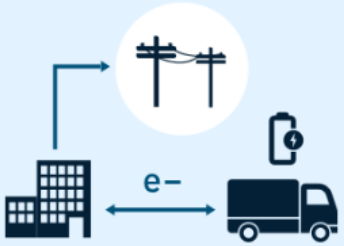
Pilot #1: Residential



Enrollment: We tripled our enrollment to 15 customers! 235 Early Bird Incentives still 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

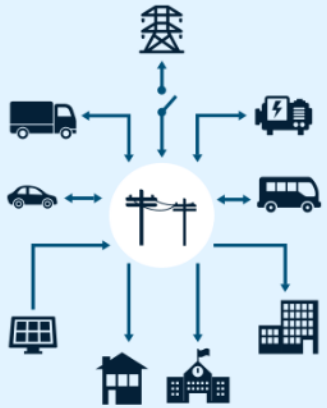
Pilot #2: Commercial



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
- Nissan Leaf paired with Fermata Energy FE-20

Pilot #3: Microgrids



Phase 1 - Testing Cohort / Redwood Coast Airport Microgrid:

- Islanded test of Frequency Control Scheme for bidirectional chargers successfully completed
- Currently gathering operational data

Phase 2 – Incentive Cohort

- Open enrollment began Q4 2024

Eligible Equipment:

- Nissan Leaf paired with Fermata Energy FE-20

EPIC 4.03

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EPIC Background and Program Overview

Electric Program Investment Charge Program (EPIC) Background

Administration: CEC manages 80% of the program, with PG&E, SCE, and SDG&E administering the remainder

Funding: CA ratepayers under the auspices of the CPUC, EPIC invests more than $130 million annually

Funding Allocations: 25% to disadvantaged communities and an additional 10% minimum to low-income communities

Program Overview

Program: EPIC 4.03 – EV Charging Solutions for Parking-Constrained Customers ~ $4.8 million

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

Timeline: Launched Q1-2025 and will conclude Q4-2028

- Phase 1 – Market Analysis and V1 Report (2025–2026)
- Phase 2 – Demonstration Projects & Evaluation (2026–2028)
- Phase 3 – V2 Report and EPIC Report (2027-2028)

Partners: Cadmus and Viridis (subcontractor)

What Do We Know From Phase 1?

Benchmarking Customer Pain Points

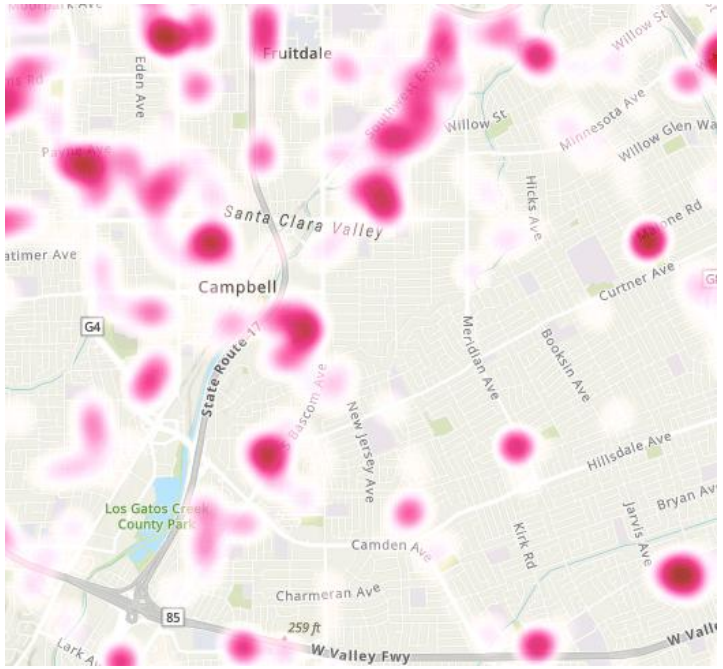
- Strategy
  - Customer survey of 469 residential customers
  - In-depth interviews with 10 MFH decision-makers
- Barriers
  - Primary: infrastructure constraints, install costs, parking location and management, installation responsibility, clarity of approval/permitting process, permitting and vendor delays, O&M logistics, and length of installation process.
  - Secondary: risk of vandalism or theft, weather conditions affecting outdoor charging setup, and fire risk.
- Solutions
  - More third-party funding through utility programs, CEC grants, etc. for electrical panel upgrades to improve project viability.
  - Clear value proposition, step-by-step guidance, simplified compliance for HOAs, education hub, and misuse prevention.
  - Having a dedicated staff, consistent utility/vendor info, and streamlined permitting for technical assistance.
  - Available ongoing support with clear communication of post-grant responsibilities for operations and maintenance logistics.

What Do We Know From Phase 1?

Market Analysis

- How do we measure parking characteristics?
  - Assigned parking → low constraints
  - Unassigned parking → medium constraints
  - No on-site parking → high constraints
- Multi-family customers with unassigned parking/medium constraints represent the largest customer segment
- The additional customer segments are ranked as follows:
  - Condos with unassigned parking/medium constraints
  - Multi-family with no on-site parking/high constraints
  - Single-family with no on-site parking/high constraints
  - Condos with no on-site parking/high constraints

Heat Map of Areas with Parking-Constrained Customers



Cities with the most parking-constrained customers in PG&E territory

1	San Francisco
2	San Jose
3	Fresno
4	Oakland
5	Bakersfield
6	Stockton
7	Modesto
8	Fremont
9	Santa Rosa
10	Roseville
11	Hayward
12	Sunnyvale
13	Santa Clara
14	Concord
15	Berkeley
16	Richmond
17	Chico
18	Salinas
19	Vallejo
20	Clovis
21	Redding
22	San Mateo
23	Citrus Heights
24	Walnut Creek
25	Antioch

EPIC 4.03 – What Do We Know From Phase 1?

Authorities Having Jurisdiction Research

Phase	Name	Status
1 CAPs and high-penetration of PCCs	City of San Jose	Interviewed
	Sonoma County	Interviewed
	Fresno Council of Governments	Interviewed
	City of San Francisco	Interviewed
	City of Oakland	Interviewed
2 Score low on permit streamlining and have high EV Penetration	City of Los Altos	Interviewed
	City of Chico	Interviewed
	City of Moraga	Scheduled
	City of Santa Maria	Scheduled
	TBD	TBD

What are we hearing?

- Some have specific plans for increasing access to charging in MFH properties and the Public Right of Way (PROW)
- MFH and PROW charging is a higher priority for AHJs with higher presence of low-income and urban communities
- Many rely on external funding to support charging deployments
- Charging deployments may require multiple permits and department collaboration → electrical, building, public works
- Those with charging resources and quick permit turnarounds note more successful deployments

What Is on the Radar?

Phase 1

- KPI and Identify and Score Available Solutions – identify the KPIs for providing and scaling charging solutions for parking-constrained drivers: where is the market today, where does it need to be, and which technology solutions available today will help us get there
- Soft Costs Associated with the Highest Scored Solutions – understand what the soft cost are associated with each down selected technology solution and to produce a proposal for how to reduce these soft costs, which PG&E will test out during the Phase 2 Demonstration Projects.
- Version 1 Report – PG&E will publish in H1 with the primary audience as AHJs, local and state regulators, community benefit organizations, utilities, and load serving entities

Phase 2

- Demonstration are planned for this year and will likely include curbside and/or streetlight EV charging as solutions to evaluate. The MSDI programs has deployed smart outlets at various sites which will support evaluating that solution.
- Evaluation of the demonstration projects will encompass installation, soft costs, marketing/education/outreach, and usage

Conclusion

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