This presentation does not contain any proprietary, confidential, or otherwise restricted information.

Transportation Electrification Impact Study (TEIS)

Vehicle Technologies Office Annual Merit Review - June 4, 2024

National Renewable Energy Laboratory: Eric Wood (PI), Brennan Borlaug, Killian McKenna, Jeremy Keen, Bo Liu, Dave Narang, Lawryn Kiboma, Yanbo Ge, Zhaocai Liu, Fan Yang, Jiayun Sun, Fletcher Ouren

Lawrence Berkeley National Laboratory: Bin Wang (PI), Wanshi Hong

Overview

Timeline

- Project start date: Nov 2022
- Project end date: Sept 2025
- Percent complete: 60%

Budget

- Total project funding: \$5.5M
 - DOE share: \$5.1M
 - EPA share: \$0.4M
- Funding for FY 2023: \$4.3M
 - o Includes \$3.9M for TEIS
- Funding for FY 2024: \$0.8M

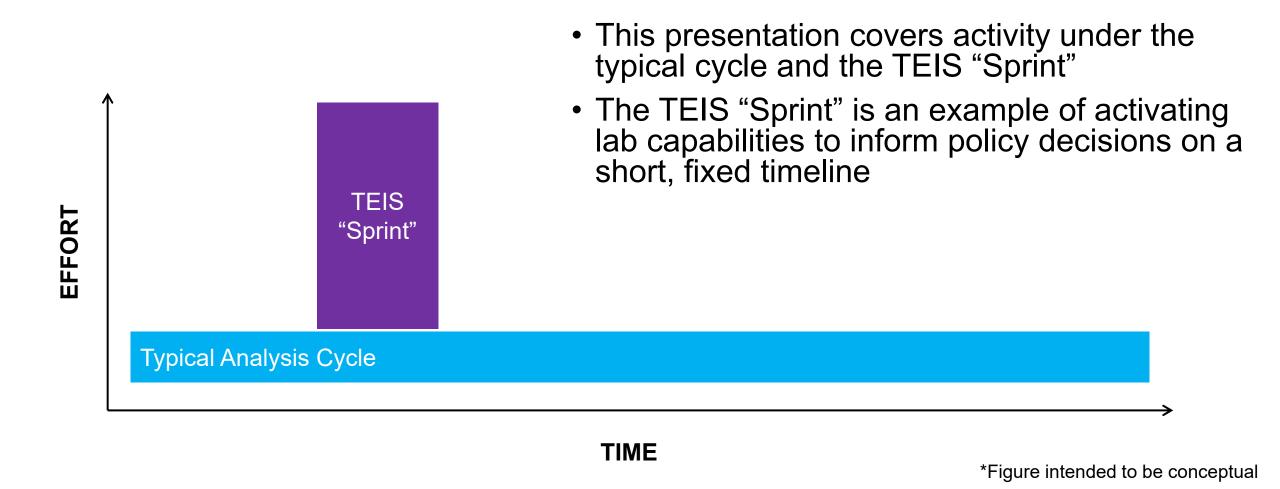
Barriers

- Availability of EV charging infrastructure
- Financial viability of charging infrastructure owner/operators
- Grid planning to enable efficient infrastructure deployment

Partners

- Kevala
- U.S. Environmental Protection Agency
- U.S. Joint Office of Energy and Transportation
- California Energy Commission
- And others (see collaboration slide)

VTO Investments Position Labs to Inform Policy



Motivation

- As EPA works to finalize historic GHG regulations for light-, medium-, and heavy-duty vehicles in March 2024, questions persist regarding the cost of requisite plug-in electric vehicle (PEV) charging infrastructure
- Charging infrastructure deployment costs are notoriously location-specific, with estimates requiring granular information on network design, potential charging flexibility, and grid readiness
- In August 2024, with support from EPA and DOE*, a team comprised of LBNL, NREL, and Kevala began collaborating on a <u>multi-state charging infrastructure</u> <u>cost assessment including grid upgrades</u> that considers potential impact of EPA policy and the mitigation potential of PEV load flexibility





MAIN MENU

Search EPA.gov

Q

News Releases: Headquarters | Air and Radiation (OAR)

CONTACT US

Biden-Harris Administration Proposes Strongest-Ever Pollution Standards for Cars and Trucks to Accelerate Transition to a Clean-Transportation Future

Building on rapid advancements and investments in clean vehicle manufacturing, including investments in domestic manufacturing in the Inflation Reduction Act, EPA's proposed standards would deliver on President Biden's agenda to tackle the climate crisis

April 12, 2023

Contact Information

EPA Press Office (press@epa.gov)

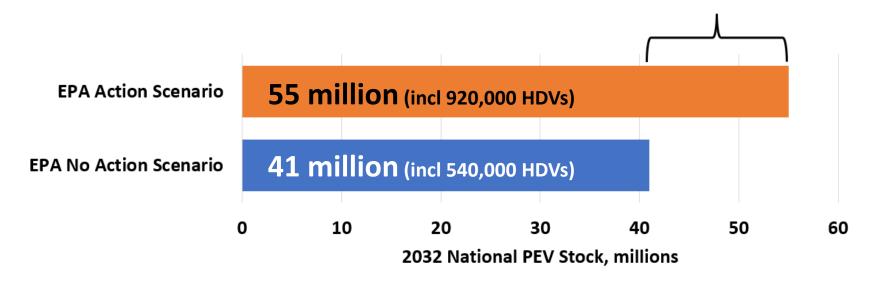
Deliverables Aim to Inform Decision Makers

| Milestone | Date | Status |
|---|--------------|----------|
| NREL will supply LBNL with two L/M/HD ZEV adoption scenarios for selected years (e.g., 2027, 2032) and various modeling assumptions necessary for consistency across discrete L/M/HD ZEV simulations. | Oct 3, 2023 | Complete |
| NREL will provide Kevala with EVI-X light-duty simulation results with quantified charging demand (load profiles) and network size in the unmanaged and mitigated cases for multiple scenarios with county-level resolution for the following states: CA, NY, IL, OK. | Oct 10, 2023 | Complete |
| Evaluation of Kevala platform, analysis, and identification of future electrification impact use cases or projects. | Oct 10, 2023 | Complete |
| NREL will provide DOE with simulated infrastructure capital cost estimates (excluding cost of grid upgrades and distributed energy resources) for multiple scenarios across the following states: CA, NY, IL, OK. | Oct 17, 2023 | Complete |
| Kevala will provide NREL with draft capital cost and average retail rate estimates (inclusive of ZEV charging/refueling equipment, installation, and distribution grid upgrades) for ZEV infrastructure scenarios modeled in Task 4 and grid asset upgrade costs quantified in Task 5 for the forecast horizon. | Oct 17, 2023 | Complete |
| Kevala will provide NREL with final capital cost and average retail rate estimates (inclusive of ZEV charging/refueling equipment, installation, and distribution grid upgrades) for ZEV infrastructure scenarios modeled in Task 4 and grid asset upgrade costs quantified in Task 5 for the forecast horizon. | Oct 31, 2023 | Complete |
| NREL will use state-level capital cost estimates from Kevala to provide insights on national trends. | Oct 31, 2023 | Complete |
| Draft report (jointly developed with LBNL, Kevala) delivered to DOE. | Nov 30, 2023 | Complete |
| Final report (jointly developed with LBNL, Kevala) delivered to DOE. | Jan 31, 2024 | Complete |
| NREL will provide DOE with documentation that a data license with Kevala has been executed, giving NREL access to Kevala's database of utility distribution topologies across multiple states. | Mar 31, 2024 | Complete |
| NREL will assess Kevala's data to ascertain how it could be applied in longer-term to comprehensive analyses on distribution system evolution driven by end-use load growth from the buildings, industrial, and transportation sectors. | Jun 30, 2024 | On track |

Focus on "Incremental" Cost of Proposed Rulemaking

- This study focuses on the delta between the EPA <u>Action</u> and <u>No Action</u> scenarios
- <u>"Incremental"</u> is used to reflect the difference between EPA's policy scenarios, including differences in:
 - PEVs on the road (light-, medium-, and heavy-duty)
 - Charging network size (up to 1.5 MW per port)
 - Upgrades to local distribution networks

14 million Incremental PEVs



Out of Scope in this Study:

Absolute Costs

Scope of this Analysis

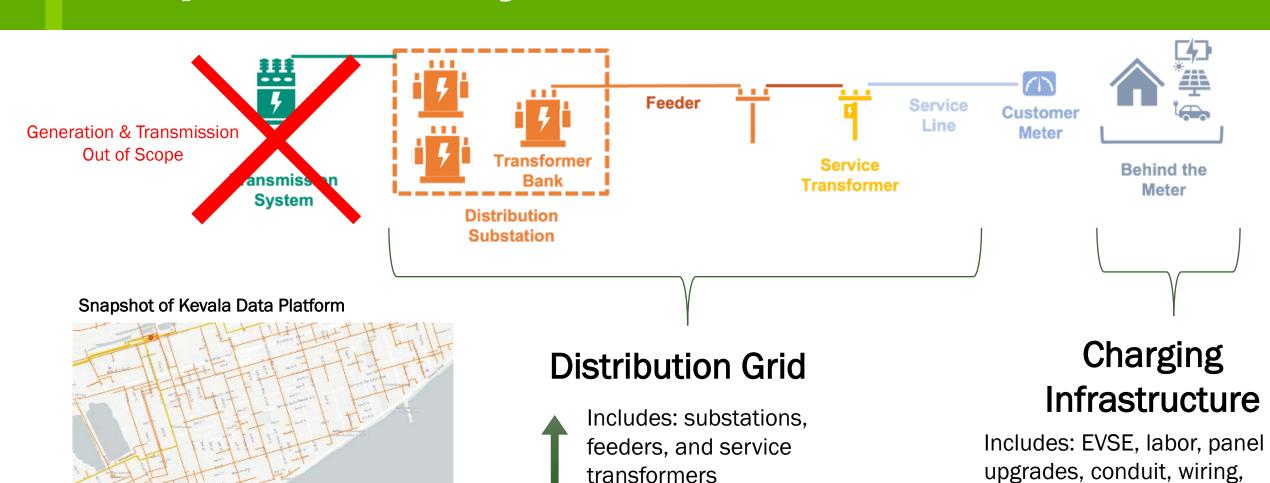
Substation

Rooftop Solar

EV Charger

Transmission Line

Feeder



(aggregated by feeder)

EVSE: Electric Vehicle Service Equipment

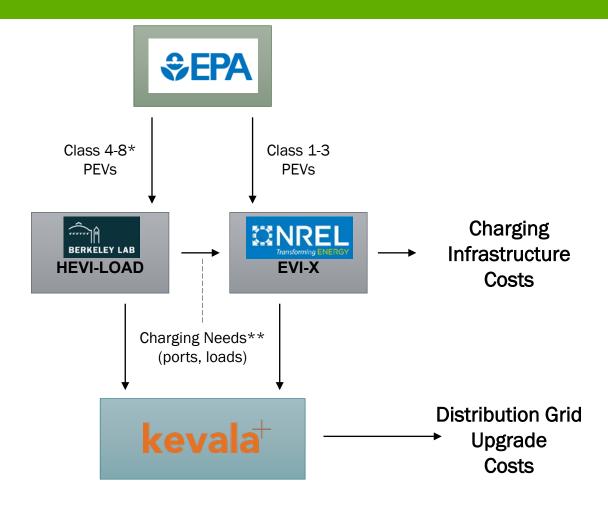
and site prep/construction

work (including trenching)

Study Design

| Variable | Extent |
|-----------------------|---|
| Analysis Years | 2027, 2032 |
| EV Adoption Scenarios | Action, No-Action (based on EPA analysis) |
| Geographic Extent | 5-States (CA, OK, IL, PA, NY) |
| Load Profiles | Managed, Unmanaged (multiple implementations) |

- Analysis years bookend EPA model year authority
- Selected states reflect diversity in urban/rural population, utility distribution grid composition, freight travel demands, and state EV policies.
- Load flexibility intended to demonstrate the value of VGI in deferring distribution costs
 - Only applies to long-duration charging opportunities (home and depot)



^{*} Excluding school/transit buses, which are simulated by NREL.

^{**} Data also being shared with EPA for production cost and capacity expansion modeling (occurring in parallel).

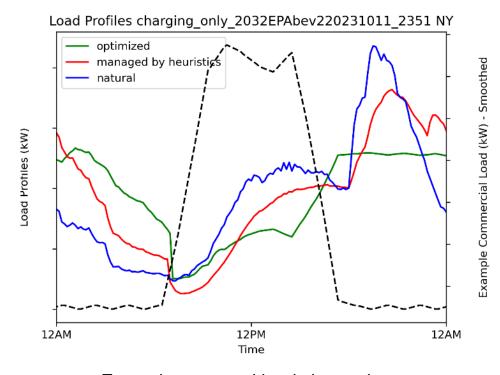
Managed Charging Scenario

- A managed charging scenario is developed to estimate the potential for distribution cost savings
 - Charge management only implemented at home/depot locations
 - Arrival/departure times are not adjusted to facilitate charge management
- "Capacity unaware" heuristic is implemented which produces a static profile that attempts to minimize the PEV charging peak
 - Implementation is ignorant to non-EV load
 - Further savings could be realized



Managed Charging Scenario

- For heavy-duty applications, heuristics-based vs optimization-based approaches to shift/flatten the load
- Heuristics-based methods
 - Objective: shift the to avoid the coincident peaks with the assumed commercial load
 - Method:
 - Extend the duration of sessions starting between 8AM and 11PM
 - Reduce the power of the selected sessions
 - Agnostic to the underlying circuit capacity and load shapes
- Optimization-based methods
 - Formulate an optimization problem (convex) to flatten the aggregated load curves
 - Consider an assumed baseload shape
 - Leverage a commercial solver with multi-thread implementation



Example managed load shapes by heuristics and optimization methods

Related Research Efforts

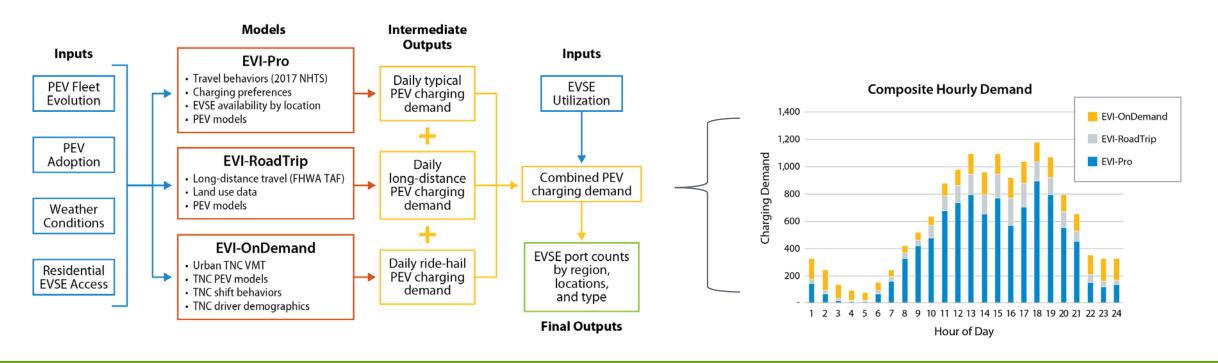
- This study (highlighted) is unique in the pursuit of distribution capacity expansion analysis with high spatial resolution across multiple states.
- To our knowledge, no other study includes a scope of this nature.
 - Many utilities are conducting detailed integrated distribution planning for their investment cycles that capture EV-driven grid upgrades and program costs for their service areas.

| | | Demand Side Variables | | | Supply Side Variables | | | |
|-------------------------------------|---------------------------|----------------------------------|-------------------------|-------------------------------------|-----------------------|--------------------------------|-----------------------|--|
| Project | Final Analysis Year | EV Adoption (class dependent) | EV Weight Classes | Charging Infrastructure Needs | Spatial Extent | Spatial Granularity | Generation Impacts | Distribution Approach |
| 2030 NCN "50x30" (JOET) | 2030 | 15% Stock (50% Sales) | LDV | Yes | National | County | No | NA |
| DECARB (DOE) | 2050 | 80% Stock | L/M/HDV | No | National | County | Yes | Econometric Model |
| EVs on Bulk Power Systems (DOE) | 2050 | 80% Stock | L/M/HDV | No | National | County | Yes | NA |
| EVs2Scale2030/eRoadMap (EPRI) | 2030 | 15% Stock (50% Sales) | L/M/HDV | No | National | ~0.28 mi ² Cells | No | NA |
| EVs@Scale/FUSE (DOE) | 2040 | 50% Stock | L/M/HDV | Yes | Virginia | Feeders | No | Power Flow of Existing System (~100 feeders) |
| Electrification Impact Study (CPUC) | 2035 | 30% Stock | L/M/HDV | Yes | California | Parcels | No | Thermal Capacity Analysis of 9,000+ feeders in CA |
| Multi-State TEIS (DOE/EPA) | 2032 | 20% Stock (67% Sales) | L/M/HDV | Yes | National | County> Parcels | No* | Thermal Capacity Analysis of 30,000+ feeders across 5-states |

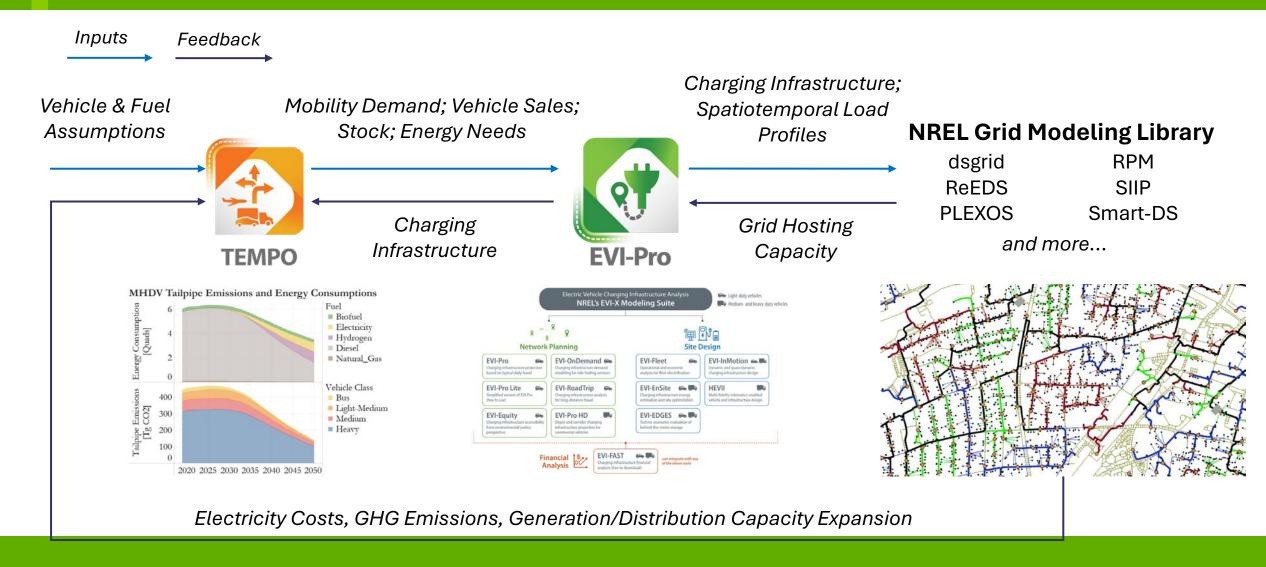
Multi-State TEIS Methodology: Light- & Medium-Duty PEVs (NREL)

National modeling framework standardizes inputs and combines outputs for each of the EVI-X demand models.

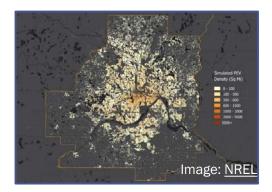
Captures regional differences in EV charging demands and port requirements due to differences in travel patterns, residential access, PEV adoption, vehicle type preferences, and weather conditions.



TEMPO + EVI-X: Integrated Modeling Pipeline



Major Steps for EV Load & Infrastructure Forecasting



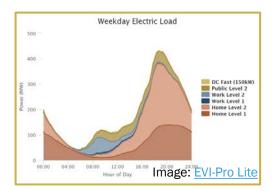
When/Where/Which EVs are <u>adopted</u>

- Which regions, communities, households are likely to adopt EVs?
- What types of EVs will be adopted?
- How quickly will EVs be adopted?



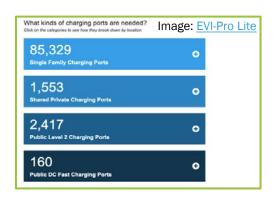
How EVs are operated

- How do driving requirements vary by region or household?
- Where are EVs parked during the day?
- Do EV travel patterns differ from ICE vehicles?



How EVs are charged

- Can EVs charge while at home, work, or in public?
- How do EV drivers prefer to charge, and will this change over time?
- Can EVs shift (in time) or modulate their loads?



What <u>charging</u> <u>infrastructure</u> is required

- What are realistic utilization levels for charging stations?
- Which deployment strategies will EVSE operators take?
- Will EVSE operators employ "idle" fees to incentivize throughput?



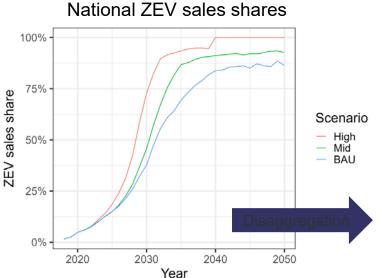
Accomplishments

Modeling TEMPO LDV Scenarios in EVI-X

In coordination with VAN050



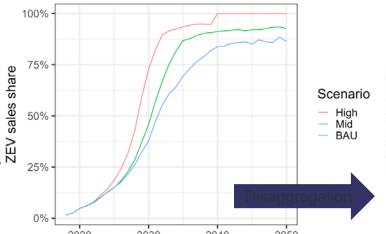
develops scenario- $\stackrel{>}{\bowtie}$ specific county ZEV sales trajectories.



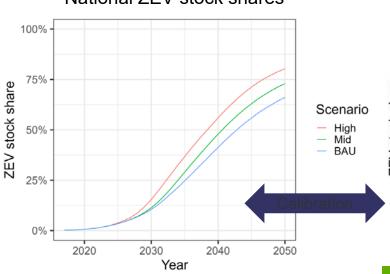




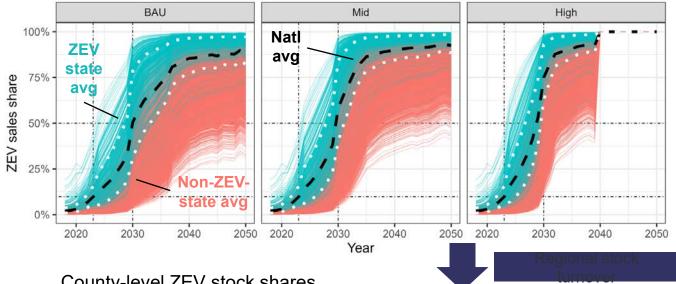
simulates EV charging for EVs projected in each county



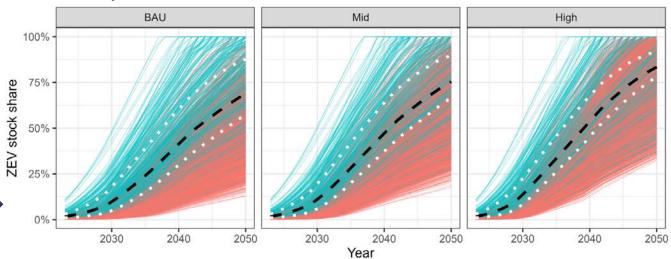
National ZEV stock shares



County-level ZEV sales shares



County-level ZEV stock shares



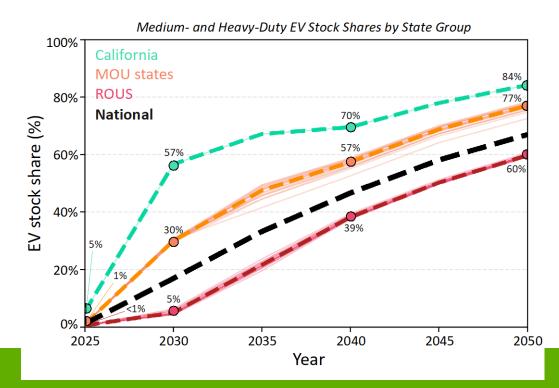
Accomplishments

Modeling TEMPO M/HDV Scenarios in EVI-X

In coordination with VAN050



TEMPO develops scenario-specific national ZEV sales trajectories that are disaggregated to the state-level based on VIUS registration shares by vehicle class and operating distance and state-level MHD electrification targets (CA, MOU, ROUS).





EVI-Pro takes these statelevel EV stock projections and simulates spatial and temporal charging demands for a set of EVSE access and charge preference assumptions.

Top 10 Counties: 2030 MHD EV Demand

| County Name | MHD EV Demand (TWh/yr) | Depot/Opp. (%) | En-route (%) |
|---------------------------|---------------------------|-------------------|-----------------|
| Los Angeles County, CA | 3.1 | 79% | 21% |
| San Bernardino County, CA | 1.3 | 47% | 53% |
| Riverside County, CA | 1.0 | 72% | 28% |
| San Diego County, CA | 1.0 | 82% | 18% |
| Kern County, CA | 0.8 | 73% | 27% |
| San Joaquin County, CA | 0.6 | 85% | 15% |
| Fresno County, CA | 0.6 | 75% | 25% |
| Sacramento County, CA | 0.5 | 85% | 15% |
| Contra Costa County, CA | 0.3 | 87% | 13% |
| Rockland County, NY | 0.3 | 93% | 7% |
| Top 10 counties: | 9.5 (25% of U.S.) | | |

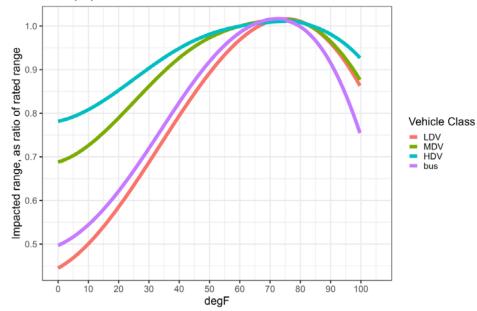
Top 10 Counties: 2050 MHD EV Demand

| County Name | MHD EV Demand (TWh/yr) | Depot/Opp. (%) | En-route (%) |
|---------------------------|---------------------------|-------------------|-----------------|
| Los Angeles County, CA | 5.7 | 70% | 30% |
| San Bernardino County, CA | 2.8 | 38% | 62% |
| Riverside County, CA | 1.7 | 59% | 41% |
| Harris County, TX | 1.6 | 85% | 15% |
| San Diego County, CA | 1.5 | 69% | 31% |
| Cook County, IL | 1.3 | 71% | 29% |
| Middlesex County, NJ | 1.2 | 76% | 24% |
| Kern County, CA | 1.2 | 54% | 46% |
| Maricopa County, AZ | 1.1 | 74% | 26% |
| New Haven County, CT | 1.0 | 82% | 18% |
| Top 10 counties: | 19.1 (8% of U.S.) | | |

TEMPO + EVI-X Harmonization Efforts

- EV technology assumptions aligned with Transport ATB & VTO/HFTO R&D Benefits analysis.
- **EV charging speed assumptions** aligned with DOE targets (full charge in 15 min or less).
- **Temp. impacts on EV efficiency** informed via on-road and lab-test data.
- **EVSE utilization** informed by real-world data and stated "breakeven" targets.
- **Charging losses** for AC L1, AC L2, and DC EVSE.
- Travel data sources for direct inputs and/or derived modeling assumptions.

PRELIMINARY AND DELIBERATIVE EV range adjustment (based on energy adjustment) due to temperature NREL proposed functions



Updated Temp <> EV efficiency Curves:

LDV: to follow most recent real-world data from Geotab (2023) and Recurrent Auto (2024). Comparisons are made against ANL (2023) and AAA (2019) lab tested data.

MHDV: Fit generalized patterns from HD-TRUCS (2023) and its source data (Basma et al. 2020).

Multi-State TEIS Methodology: Heavy-Duty PEVs (LBNL)

Travel Demand Modeling



Agent-based Simulation

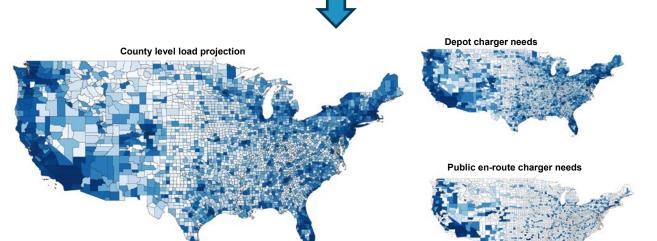


Infrastructure & Load Assessment





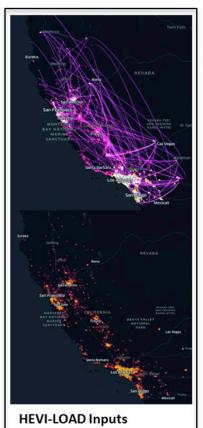
- Adoption scenario (EPA)
- NHTS/INRIX truck OD data
- Telematics data (FleetDNA)
- National Freight Network (FAF)
- Vehicle specifications
- Experian registration data
- Business census data
- Etc.



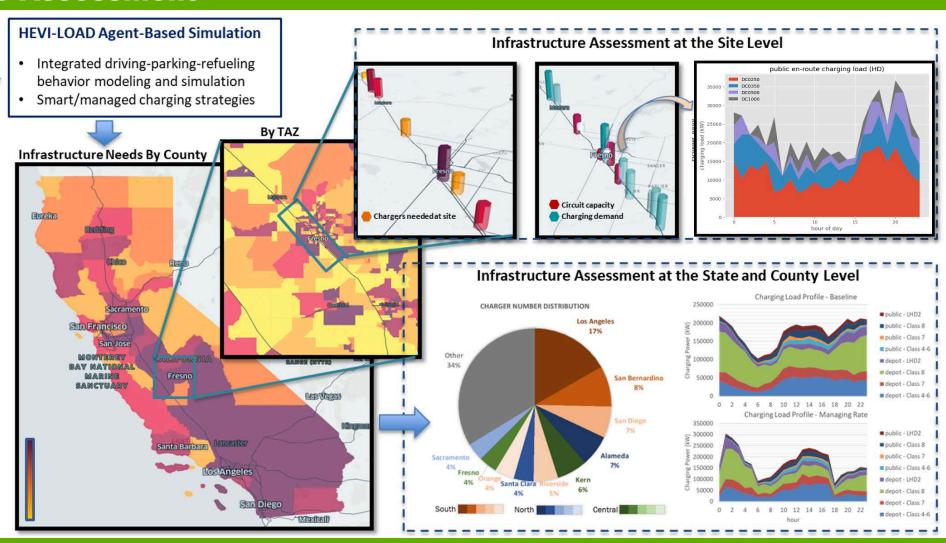




Medium- and Heavy-Duty Electric Vehicle Load, Operations, and Deployment (HEVI-LOAD) Augmentation for National-Scale Infrastructure Assessment

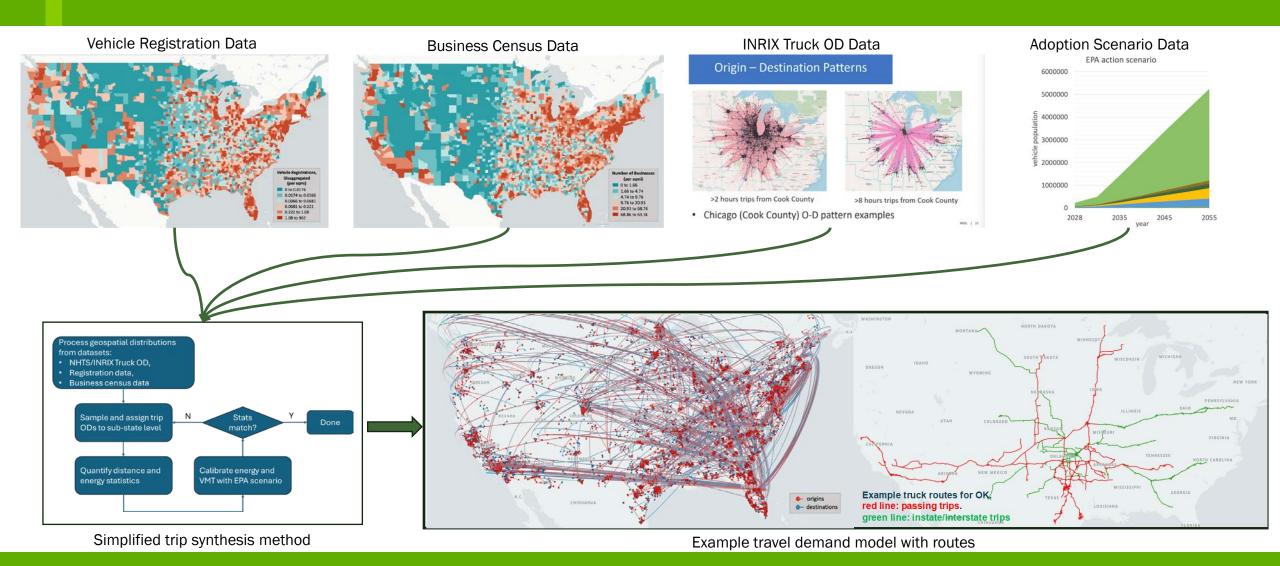


- · MDHD travel demand (trips),
- parking and infra. location,
- truck GPS data,
- adoption scenarios,
- · vehicle specifications, etc.



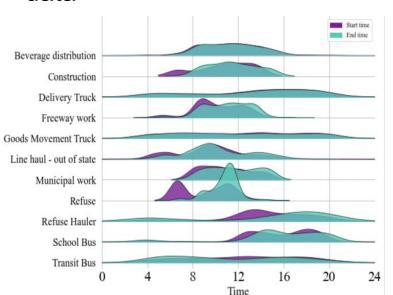
Approach

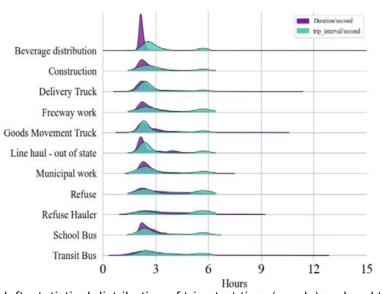
Trip and Travel Demand Modeling



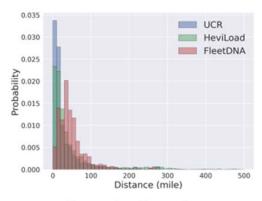
Trip and Travel Demand Modeling

- Calibrate the travel demand models as inputs to HEVI-LOAD
- Characterize trip starting time and durations with real-world datasets (e.g., telematics data from UCR and NREL FleetDNA, etc.)
- Calibrate the trip distance and VMT statistics with the existing survey data

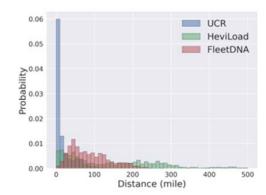




GPS location data (UCR & WVU) to inform the travel demand model, left: statistical distribution of trip start time (purple) and end time (green) for multiple applications, right: statistical distribution of trip duration (purple) and trip interval duration (green)



(a) Vocational heavy-duty

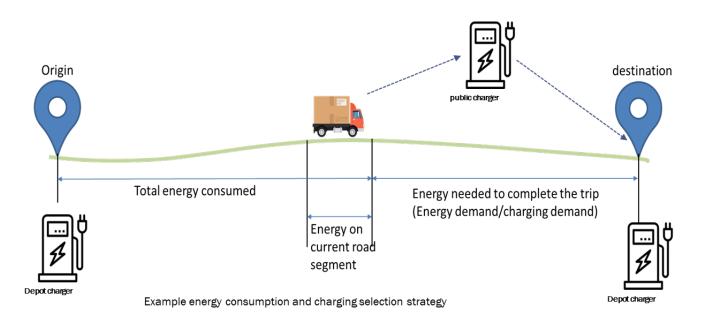


(b) Short-haul heavy-duty

Trip distance statistics used to inform the travel demand generation

En-Route Charger Selection Heuristics

- Simulate the entire driving-routing-parking-charging behavior chain within HEVI-LOAD
- Solve the charging plans for each trip (depot vs. public chargers) select the enroute charger(s) with the shortest distance/travel time
- Jason's Law database was utilized for the initial public en-route charging locations



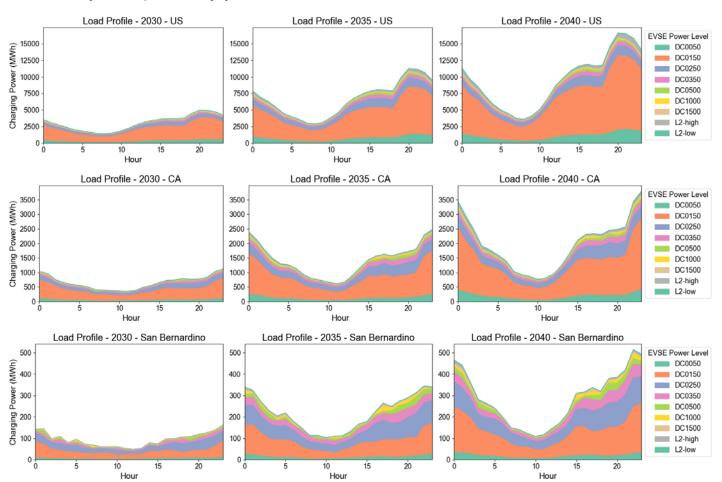


Truck parking locations along the freeway corridors

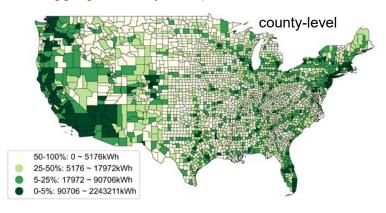
Accomplishments

Charging Infrastructure and Load Profile Results

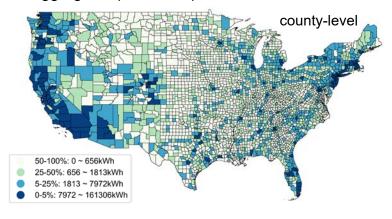
Hourly load profile by year



Aggregated daily load percentile

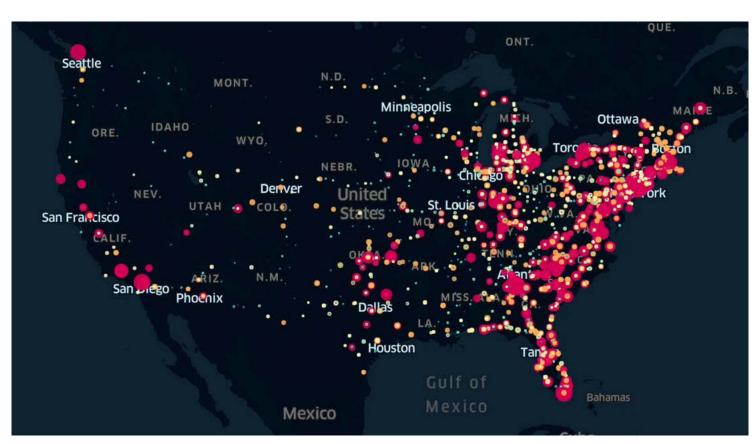


Aggregated peak load percentile



Hydrogen refueling demand

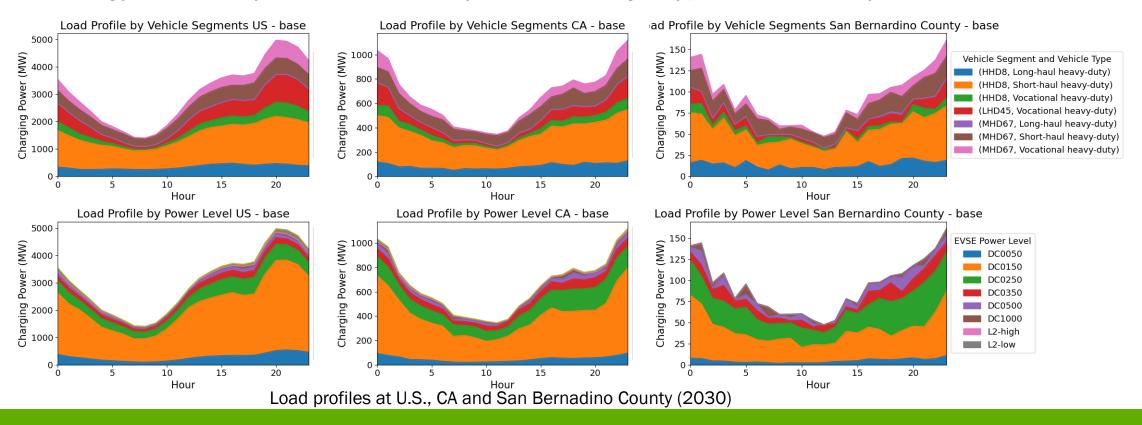
- No depot charging behaviors are assumed for Hydrogen fuel cell EVs
- Existing <u>truck stops</u> are assumed to be the initial candidate locations for hydrogen refueling
- Collaborate with NREL SERA team to determine the hydrogen simulation scenario (powertrain, infrastructure and station spacing and prioritization, etc.)
- Ongoing work to refine the scenarios and simulation



Simulated hydrogen refueling demand aggregated at the truck stops

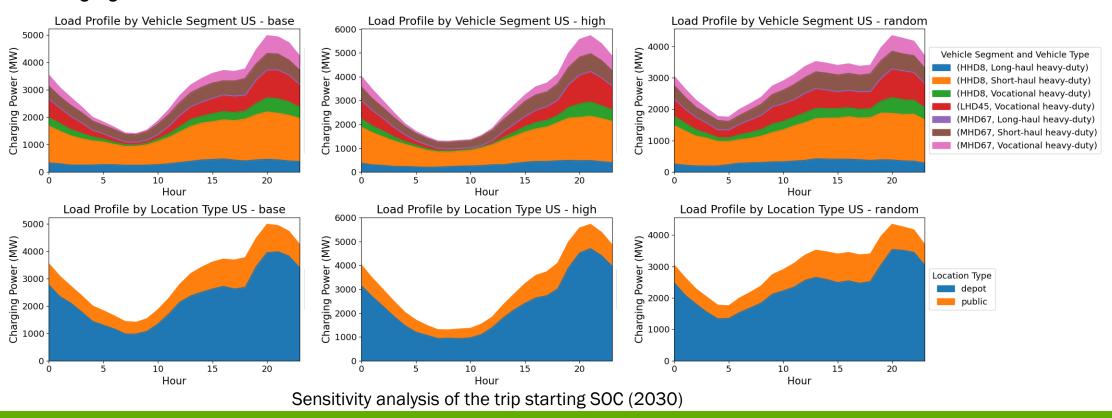
Sensitivity Analysis

- Compare charging load results at different geospatial scales national, state and county
- The level of smoothness tends to reduce as the geospatial granularity increases
- Energy demand by different vehicle types and charger types will also vary



Sensitivity Analysis

- Compare charging load results with respect to different starting State of Charge (SOC) levels
- The overall load shape changes due to the updated charging behaviors
- Higher starting SOCs tend to shift the charging demand to later times and reduce the percentage of public charging demand



Multi-State TEIS Methodology: Distribution Upgrades (Kevala)

Objective

Parcel-Level Base Load and **Existing PV**













Methodology / Tools



Demand Modifier Forecast







Bottom-Up **Propensity Adoption** to Disaggregate County-Level EVI-X and HEVI-LOAD



Size







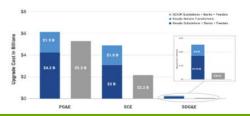
Behavior Adoption

Target

Kevala National Grid Data







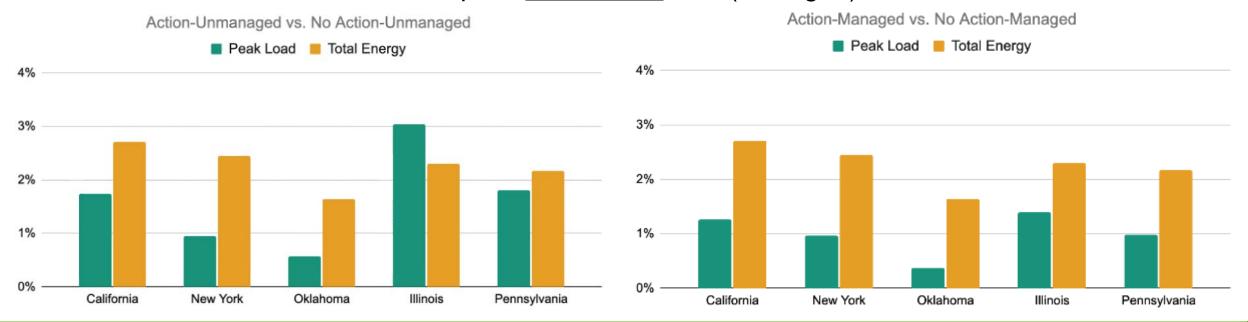
Stepwise Grid Infrastructure Needs Assessment

Unit Cost Assignment and Aggregation





- Total load is consistent across managed/unmanaged
 - 1.6% to 2.7% increase in total incremental load (as a result of Action)
- Managed scenario is more effective at reducing peaks
 - 0.6% to 3.0% increase in peak <u>incremental</u> load (unmanaged)
 - 0.4% to 1.4% increase in peak incremental load (managed)



| Five-State Scenarios (2032) | (2032) Action vs No Action | | |
|--|--------------------------------------|--|--|
| | Unmanaged Managed | | |
| Incremental PEV adoption (all weight classes) | 3.9 million | | |
| Incremental charging ports (all types) | 2.3 million | | |
| Incremental charging infrastructure capital investment | \$9.7 billion | | |
| Incremental substations | 8 4 | | |
| Incremental feeders | 125 75 | | |
| Incremental service transformers | 30,000 21,000 | | |
| Incremental distribution grid capital investment | investment \$2.3 billion \$1.6 billi | | |
| Combined incremental infrastructure capital investment | \$12.0 billion \$11.3 billion | | |

| Five-State Scenarios (2032) | Action vs No Action | | |
|--|-------------------------------|--|--|
| | Unmanaged Managed | | |
| Incremental PEV adoption (all weight classes) | 3.9 million | | |
| Incremental charging ports (all types) | 2.3 million | | |
| Incremental charging infrastructure capital investment | \$9.7 billion | | |
| Incremental substations | 8 4 | | |
| Incremental feeders | 125 75 | | |
| Incremental service transformers | 30,000 21,000 | | |
| Incremental distribution grid capital investment | \$2.3 billion \$1.6 billion | | |
| Combined incremental infrastructure capital investment | \$12.0 billion \$11.3 billion | | |

3% Annual Increase (relative to No Action)

| ve-State Scenarios (2032) Action | | on vs No Action | | |
|--|--------------------------|-----------------|--|--|
| | Unmanaged Managed | | | |
| Incremental PEV adoption (all weight classes) | 3.9 million | | | |
| Incremental charging ports (all types) | 2.3 million | | | |
| Incremental charging infrastructure capital investment | \$9.7 billion | | | |
| Incremental substations | acremental substations 8 | | | |
| Incremental feeders | 125 75 | | | |
| Incremental service transformers | 30,000 21,000 | | | |
| Incremental distribution grid capital investment | \$2.3 billion | \$1.6 billion | | |
| Combined incremental infrastructure capital investment | \$12.0 billion | \$11.3 billion | | |

3% Annual Increase (relative to No Action)

Approximately 3% of existing annual distribution system investments across these 5 states over 6 years

| Five-State Scenarios (2032) | Action vs No Action | | |
|--|-----------------------------|----------------|--|
| | Unmanaged Manage | | |
| Incremental PEV adoption (all weight classes) | 3.9 million | | |
| Incremental charging ports (all types) | 2.3 million | | |
| Incremental charging infrastructure capital investment | \$9.7 billion | | |
| Incremental substations | 8 4 | | |
| Incremental feeders | 125 75 | | |
| Incremental service transformers | 30,000 21,000 | | |
| Incremental distribution grid capital investment | \$2.3 billion \$1.6 billion | | |
| Combined incremental infrastructure capital investment | \$12.0 billion | \$11.3 billion | |

3% Annual Increase (relative to No Action)

Approximately 3% of existing annual distribution system investments across these 5 states over 6 years

Based on NREL Annual Technology Baseline, fleetwide net benefits (\$33 billion) are at least 2.5x greater than incremental infrastructure costs (excludes emission benefits)

| Five-State Scenarios (2032) | Action vs No Action | | |
|--|---------------------|----------------|--|
| | Unmanaged | Managed | |
| Incremental PEV adoption (all weight classes) | 3.9 m | illion | - 20/ Appual Ingress |
| Incremental charging ports (all types) | 2.3 m | nillion | 3% Annual Increase (relative to No Action) |
| Incremental charging infrastructure capital investment | \$9.7 t | oillion | |
| Incremental substations | 8 | 4 | _ |
| Incremental feeders | 125 | 75 | Managed charging (at homes |
| Incremental service transformers | 30,000 | 21,000 | and depots) decreases PEV peak by 30%. Substantial |
| Incremental distribution grid capital investment | \$2.3 billion | \$1.6 billion | asset deferrals, cost savings. |
| Combined incremental infrastructure capital investment | \$12.0 billion | \$11.3 billion | _ |
| | A | | |

Approximately 3% of existing annual distribution system investments across these 5 states over 6 years

Based on NREL Annual Technology Baseline, fleetwide net benefits (\$33 billion) are at least 2.5x greater than incremental infrastructure costs (excludes emission benefits)

Additional Activities Under this Project

- Updating EVSE cost assumptions (with ANL/BNEF, JOET/McKinsey)
- Evaluating the Kevala platform for other projects (NREL)
- Synergy between LDV, MDV, and HDV charging
- Updating HDV activity data (multiple sources)
- Load flexibility scenarios, including "capacity aware"
- Coordinating hydrogen demand (HFTO)
- Analyzing cost-benefits in Integrated Planning Model (EPA)
- National extrapolation of 5-state results
- State variation in infrastructure costs
- Forthcoming national HEVI-LOAD study (LBNL)
- On-going supporting EVGridAssist

Responses to Previous Year Reviewer Comments

This project was not reviewed in FY22.

Collaboration and Coordination with Other Institutions

- This project has benefited from engagement with the following organizations:
 - California Energy Commission
 - Edison Electric Institute
 - Electric Power Research Institute
 - Environmental Resources Management
 - Evgo
 - Kevala
 - General Motors
 - National Grid
 - New York State Department of Public Services
 - New York State Energy Research and Development Authority

- Shell Recharge Solutions
- Toyota Research Institute
- Trillium
- U.S. Department of Transportation
- U.S. Environmental Protection Agency
- U.S. Joint Office of Energy and Transportation

Remaining Challenges and Barriers

- Applied planning for distribution asset manufacturing ramp
- Options for maximizing ability to serve load in the near-term
- Quantify infrastructure needs stemming from IRA, state policy

Proposed Future Work

- **Develop pipeline** for generating county-level load profiles and associated infrastructure requirements using EVI-Pro for any national TEMPO run [In Progress]
- Coordinate with EVs@Scale NextGen Load Profiles project to update assumptions around ratio of "effective" to peak EV charging rates and temperature impacts on EVSE efficiency [Planned]
- Increase the spatial resolution of EVI-X for distribution-level planning & analysis [Planned]
- Better **incorporate feedbacks** from each model to inform/align assumptions (e.g., EVI-Pro charging mix informing TEMPO EV charging costs) [Future Opportunity]

Conclusions

- Charging infrastructure and grid upgrade <u>investments that enable PEV adoption</u> offer significant environmental, health, and economic benefits, including consumer cost savings
 - Incremental cost of charging infrastructure (\$12.0 billion investment across five states, between 2027 and 2032) was found to be at least two times smaller than the lifetime net benefits of vehicle electrification (including purchase price and fuel savings but excluding the value of avoided emissions).
- Incremental distribution grid investment to enable PEV charging (\$2.3 billion across five states) was found to be approximately <u>3% of existing utility distribution system</u> investments (2027-2032).
- The potential for managed charging to defer distribution grid upgrades was found to be significant.
 - Managed charging was shown to decrease incremental distribution grid upgrade costs from \$2.3 billion, to \$1.6 billion across five states, over six years.
 - A reduction of this magnitude <u>alleviates the need for thousands of distribution assets</u> (including service transformers) across the 5-states under study.

Key Publications

- Wood, E., B. Borlaug, M. Moniot, D-Y Lee, Y. Ge, F. Yang, and Z. Liu. 2023. "The 2030 National Charging Network: Estimating U.S. Light-Duty Demand for Electric Vehicle Charging Infrastructure." NREL Technical Report 85654, June. https://www.nrel.gov/docs/fy23osti/85654.pdf.
- Wood, E., B. Borlaug, D-Y Lee, Y. Ge, and F. Yang. 2023. "Enhancing the EVI-X National Framework to Address Emerging Questions on Charging Infrastructure Deployment." Presented at the 2023 Vehicle Technologies Office Annual Merit Review. https://www.nrel.gov/docs/fy24osti/86030.pdf.
- Wood, E., D-Y Lee, L. Spath-Luhring, B. Borlaug, M. St. Louis-Sanchez, Y. Ge, and F. Yang. 2023. "EVI-X Updates and National Charging Assessment Report." Presented at the 2023 Vehicle Technologies Office Annual Merit Review, https://www.nrel.gov/docs/fy24osti/86417.pdf.
- Wood, E., Borlaug, B., McKenna, K., Keen, K., Liu, B., Sun, J., Narang, D., Kiboma, L., Wang, B., Hong, W., Giraldez, J., Moran, C., Everett, M., Horner T., Hodges, T., Crisostomo, N., and Walsh, P. 2024. "Multi-State Transportation Electrification Impact Study: Preparing the Grid for Light-, Medium-, and Heavy-Duty Electric Vehicles" DOE/EE-2818, https://www.energy.gov/policy/articles/new-multi-state-analysis-helps-guide-grid-planning-electric-vehicle-charging