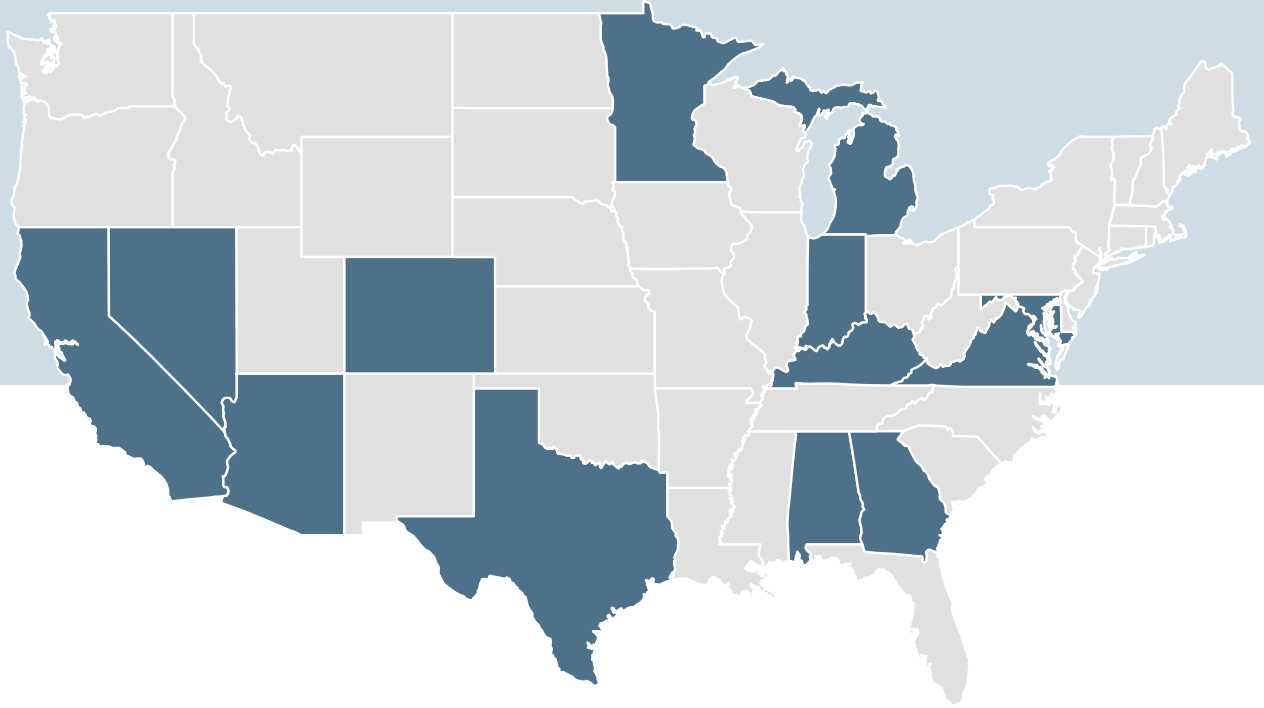


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US Utility Electric Vehicle Tariffs

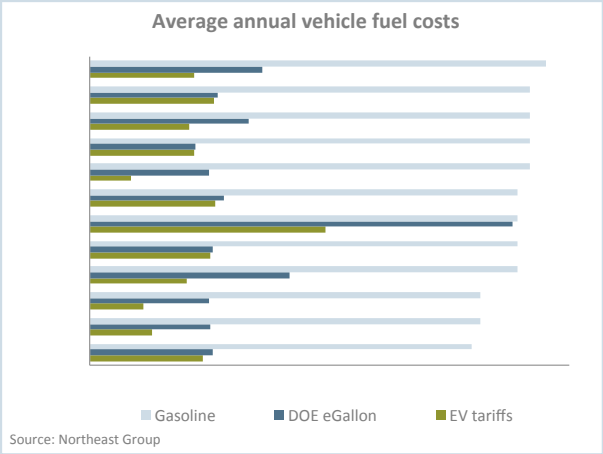
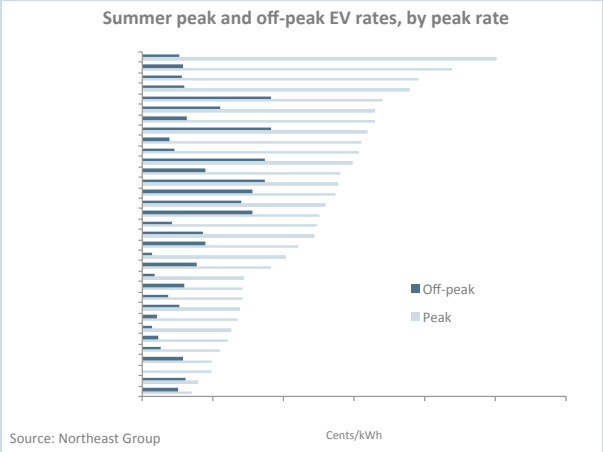
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Electric utilities in the US are grappling with a number of challenges related to electric vehicles, from determining which infrastructure upgrades may be required on their distribution systems to assessing which tariff structures are most effective. As the first wave of EVs hit the US market several years ago, a few select utilities began launching EV tariffs. Northeast Group first published its benchmark and analysis of these EV tariffs and their implications for utilities and EV owners in July 2011. This fifth volume of the benchmark provides an exhaustive look at all of the utilities that have launched EV tariffs to-date.

As of June 2015, 28 distribution utilities across the US have launched EV tariffs. Unsurprisingly, many of the utilities are located in California and Michigan. California utilities are at the forefront of several smart grid initiatives, while Michigan utilities are eager to support automobile manufacturers working on transitioning their production lines to EVs. Utilities included in this benchmark are located in the following states:

- **Alabama;**
- **Alaska;**
- **Arizona;**
- **California;**
- **Colorado;**
- **Georgia;**
- **Hawaii;**
- **Indiana;**
- **Kentucky;**
- **Maryland;**
- **Michigan;**
- **Minnesota;**
- **Nevada;**
- **Texas;** and
- **Virginia.**



Key questions answered in this study:

- Which utilities have launched EV tariffs and what tariff structures have they used?
- How do EV tariffs compare with the eGallon determined by the DOE?
- How have utilities structured their electric vehicle TOU rates and what is the average peak to off-peak discount?
- What issues help determine whether to use single or second meters for EV pricing?

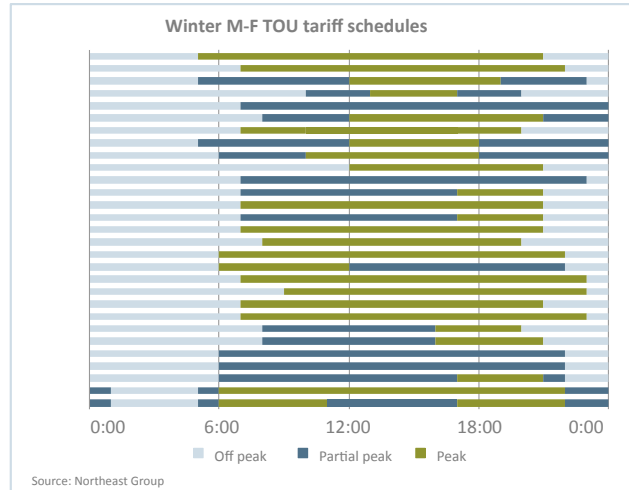


Table of Contents

| | |
|---|----|
| 1. Key findings | 1 |
| 2. Background | 1 |
| 3. The EV market and tariffs in 2015 | 3 |
| 4. Tariff structures | 8 |
| 4.1 TOU tariffs | 9 |
| 4.2 Flat rate tariffs | 10 |
| 4.3 Sliding scale tariff mechanisms | 10 |
| 5. Issues related to tariff structures | 11 |
| 5.1 Single meter vs. second meter | 12 |
| 5.2 Comparison to DOE “eGallon” | 14 |
| 5.3 Comparison to non-EV TOU rates | 14 |
| 5.4 Summer vs. winter rates | 15 |
| 5.5 Public charging stations and inclusion in rate base | 17 |
| 6. Benchmark of US utility EV tariffs | 17 |
| 6.1 EV TOU rates: peak and off peak | 21 |
| 7. Scenario analysis: tariffs compared | 21 |
| 7.1 How do these tariffs play out in various scenarios? | 21 |
| 7.2 What do these scenarios reveal? | 22 |
| 8. More EV tariffs on the way | 25 |
| 9. Appendix: EV tariffs offered by US utilities in 2015 | 27 |

List of Figures

| | |
|---|----|
| Figure 1: Locations of utilities with EV tariffs | 2 |
| Table 1: Cost comparison—Conventional vehicles vs. EVs in Northern California | 4 |
| Figure 2: Percentage of customers with access to EV tariffs | 5 |
| Figure 3: Percentage of utilities offering EV tariffs | 5 |
| Figure 4: Two tariff structures | 7 |
| Table 2: List of utilities using each tariff structure | 9 |
| Figure 5: Tiered summer peak pricing at PG&E | 11 |
| Table 3: Utilities with whole house or 2 nd meter options | 12 |
| Figure 6: Average eGallon costs with EV tariffs | 13 |
| Figure 7: Average eGallon costs by state with and without EV tariffs | 13 |
| Figure 8: Annual savings from EV TOU rates as opposed to regular TOU rates (40 miles/day) | 14 |
| Figure 9: Summer off-peak discount | 16 |
| Figure 10: Winter off-peak discount | 16 |
| Figure 11: Summer M-F tariff schedules | 18 |
| Figure 12: Winter M-F tariff schedules | 19 |
| Figure 13: Summer peak and off-peak EV rates, by peak rate | 19 |
| Figure 14: Summer peak and off-peak EV rates, by off-peak rate | 20 |
| Figure 15: Winter peak and off-peak EV rates, by peak rate | 20 |
| Figure 16: Winter peak and off-peak EV rates, by off-peak rate | 21 |
| Figure 17: Summer peak charging scenario | 22 |
| Figure 18: Winter peak charging scenario | 23 |
| Figure 19: Average annual vehicle costs | 25 |

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