

Southern California Edison Charge Ready Light Duty Program

2025 Evaluation Report

June 30, 2026



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1. Executive Summary

On August 27, 2020, the California Public Utilities Commission (CPUC or Commission) issued Decision (D.) 20-08-045 (hereafter referred to as the Decision) authorizing Southern California Edison Company's (SCE) Charge Ready 2 Infrastructure and Market Education Programs, also known as SCE's Charge Ready Light Duty (CRLD) Program. The CRLD Program is an extension of the Charge Ready and Market Ready Phase 1 Pilot (Phase 1 Pilot).¹ The CRLD Program supports California's greenhouse gas (GHG) emissions reduction goals by adopting transportation electrification (TE). This report provides the annual update for the CRLD Program, covering program activities between January 2025 and December 2025 as well as the standard reporting requirements outlined in Senate Bill (SB) 350 TE Program. Additionally, where applicable, this report provides cumulative updates on the CRLD Program from the start of the program through the end of 2025.

SCE's goals are to install approximately 30,000 EV charging ports through the various Charge Ready Programs. Further, SCE has specific minimum adoption targets for charging ports installed in disadvantaged communities (DACs) and multi-unit dwellings (MUDs). The CRLD Program was launched in July 2021 and is open to applications through June 30, 2026, and all agreements must be fully executed by December 31, 2026.² Since CRLD Program launch, SCE has accepted applications for Level (L) 2 charging stations. In November 2023, the CPUC approved a Direct Current Fast Charging (DCFC) Program offering, which provides financial incentives for L3 charging stations (i.e., DCFC stations). Beginning in April 2024, SCE started accepting applications for the DCFC Program. Please note that this report only covers CRLD Program activity in 2025.

In 2025, the CRLD Program included the following active program offerings available to SCE customers:

- **Charge Ready Make Ready (Make Ready) Expansion Program**, including the Charging Infrastructure and Rebate (CIR) Program, where SCE provides make-ready infrastructure on both the utility- and customer-side of the meter up to a stub-out or connection point for the charging station. The Program may also offer charging station installation rebates for public, workplace, multifamily, and fleet charging. Make Ready also includes the Customer-Side Make Ready Rebate (CSMR) Program, where SCE provides the utility-side of the meter infrastructure, and the participant designs and installs the customer side. CSMR rebates offset up to 80% of the costs SCE would otherwise incur for performing the work or 80% of what the customer spent, whichever is less. Like CIR, the CSMR Program may also offer eligible participants a rebate to offset the costs associated with the purchase and installation of SCE-approved charging equipment. In 2022, SCE made the decision to sunset charging station rebates due to limited rebate funds. As a result, not all CIR and CSMR applications from 2023 onward were eligible for charging equipment rebates.

Another Make Ready offering is the Charge Ready Own and Operate (Turn-key) Program, where SCE installs, owns, and operates charging stations in existing MUDs located in DACs or offers a maintenance and networking rebate to qualified customers who choose to own and operate the stations themselves. The last Make Ready offering is the Small Site Rebate (SSR) Program, which provides rebates to MUD, public sector, and commercial sites installing four or fewer Level 2 (L2) charging station ports. The SSR rebate option is available to participants who design, purchase, and install the customer-side of the meter infrastructure work. The SSR Program offering was formally launched in the first quarter of 2023, and SCE has allocated approximately \$1.6 million to this offering.

- **Make Ready Direct Current Fast Charging (DCFC) Program** provides financial incentives for Level 3 (L3) charging stations at publicly-accessible properties that would support short charging times (less than two hours) that choose to purchase and install two or more DCFC charging stations. SCE provides the utility-side of the meter infrastructure

¹ A one-year pilot deploying charging stations and complementary marketing, education, and outreach in support of electric transportation.

² SCE submitted an extension of the application acceptance. Advice Letter 5334-E was filed and effective on July 12, 2024, being formally approved on September 13, 2024. Per CPUC decision (R. 23-12-008) all agreements must be fully executed from customers by 11:59 p.m. December 31, 2026.

and the customer designs and installs the customer-side of the meter infrastructure. This program additionally offers incentives to offset the cost of customer-side infrastructure work, and a rebate for the charging station. SCE began accepting applications for the DCFC Program in April of 2024.

- **Charge Ready New Construction Rebate (NCR) Program**, a CRLD Program that provides rebates to new construction MUD sites that exceed the current mandatory CALGreen Code or relevant local requirements with the installation of charging stations.³ Applications for the NCR Program were accepted through July 12, 2025.
- **Transportation Electrification Advisory Services (TEAS) Program** provides advisory services and education to customers interested in TE. These services provide customers with a no-cost consultation with an SCE TE advisor who provides information on site planning, parking lot considerations, electric vehicle supply equipment (EVSE) infrastructure, rates, managed charging, and more. These consultations are designed to help customers make informed decisions related to their transportation electrification projects. This Program uses evaluation and reporting criteria different from the previous three CRLD programs described.

The total approved budget for the CRLD Program is \$436 million. From its launch in 2021 through the end of 2025, the CRLD Program received 4,595 applications with 93,838 ports requested, completed 425 projects, and installed 7,681 ports across CRLD Programs. Since its launch, the Make Ready portion of the CRLD Program has benefited from consistently high market demand for charging infrastructure. In response to this high demand, in September of 2022 SCE created a waitlist for non-DAC applications for the Make Ready Expansion Program. This waitlist allowed the CRLD Program to further emphasize DAC port installation targets. The waitlist remained active in 2025 for non-DAC applications, and is monitored to ensure that non-DAC applications are accepted to the extent that the program continues to meet its DAC port requirements.

1.1 Key Findings

- **The CRLD Program is successfully advancing charging deployment in priority markets.** From program launch through the end of 2025, the CRLD Program facilitated the commitment of 23,357 EV charging ports, with deployment concentrated in MUDs and DACs. Through continued prioritization of DAC applications, the Program is on track to meet and exceed Make Ready Expansion targets, with a majority of newly submitted Make Ready ports in 2025 located in DACs.
- **Installed CRLD infrastructure is increasingly utilized and delivering environmental benefits.** Advanced Metering Infrastructure (AMI) data indicate growing utilization as new sites become energized, contributing to program-to-date avoided greenhouse gas emissions of an estimated 11,772 metric tons of CO₂e. These results indicate that installed infrastructure is being actively used and supporting transportation electrification outcomes at scale.
- **Charging behavior generally aligns with off-peak periods, supporting grid integration objectives.** Observed load patterns show that CRLD charging occurs predominantly during off-peak hours, with limited contribution to system peak demand, suggesting compatibility with existing rate structures and grid conditions.
- **Project timelines remain highly variable and are largely driven by external factors.** CRLD projects experience long and variable timelines, primarily due to permitting requirements, customer-side approvals, and jurisdiction-specific processes outside of SCE's direct control. Site hosts consistently report that delays are challenging when expectations are not clearly set up front. These challenges not only affect project delivery but also constrain EVSP workforce planning and hiring decisions.

³ The CALGreen Code is formally known as the California Green Building Standards Code, Title 24, Part 11, California Code of Regulations.

- **Recommendation:** Continue streamlining early-phase processes where feasible and strengthen expectation-setting around project timelines at enrollment, with proactive communication when delays arise, especially when timelines are affected by external factors. Additionally, public charging programs should treat multi-stakeholder timeline coordination as a structural design feature by embedding realistic timeline frameworks into enrollment, standardizing communications about delays, ensuring those communications occur early, and accounting for cascading impacts on participants with grant-funded, code compliance-driven, or other commitment-bound deadlines.
- **End users and site hosts report high satisfaction alongside concerns about charging speed and technological evolution.** Overall satisfaction with CRLD installations is high; however, charging speed remains a concern for some end users, and site hosts report increasing awareness of technology obsolescence as charging needs evolve.
 - **Recommendation:** Continue to consider opportunities to deploy higher-powered charging technologies where demand supports it and explore structured options that allow for technology upgrades or refreshes over time, consistent with program requirements.
- **Site hosts face post-installation challenges related to charger issues and responsibility clarity.** After installation, site hosts often experience difficulty navigating charger issues and determining responsibility among manufacturers, network providers, contractors, and other stakeholders, particularly as equipment ages. Some EVSPs raised similar needs for determining post-installation roles and responsibilities.
 - **Recommendation:** Strengthen post-installation communications to clearly set expectations regarding maintenance responsibilities, common charger issues, and appropriate escalation pathways, helping site hosts navigate challenges without expanding SCE's operational scope.
- **Financial incentives and electrical infrastructure support is a key driver in site host participation and port installations.** Most site hosts said they would have reduced, delayed, or not installed chargers without SCE support, and that SCE's infrastructure work was critical to project feasibility.
- **EVSP satisfaction with the CRLD Program is strongly shaped by the consistency of program engagement.** Satisfaction is highest when EVSPs have stable points of contact, reliable communication, and clear visibility into program processes and compliance requirements (e.g., data reporting). Satisfaction declines when contacts change, communication becomes inconsistent, or program visibility is limited.
 - **Recommendation:** Maintain consistent points of contact and standardize communication practices to improve continuity and deliver a more consistent EVSP experience.

2. Program Description and Background

This report covers the 2025 program year (January 2025–December 2025) of SCE’s CRLD Program, as required by the CPUC D.20-08-045 and to meet standard reporting requirements for SB 350 TE Programs. It also reports cumulative program participation and charging activity, as charging projects typically span multiple program years. SCE’s CRLD Program aims to further California’s goal of attaining a 40% reduction of GHG emissions from 1990 levels by 2030 and an 80% reduction in emissions by 2050. This evaluation report presents the results of CRLD Program activity in 2025 and since its inception in 2021.

2.1 Program Description

In October 2014, SCE filed its Phase 1 Pilot. SCE proposed a two-phase program in the Phase 1 Pilot application: (1) a one-year pilot to deploy up to 1,500 charging stations and complementary marketing, education, and outreach in support of electric transportation (Phase 1); and (2) a four-year deployment of the remaining 30,000 charging stations along with broader EV education and outreach (Phase 2).⁴ SCE’s CRLD Program is the extension of the Phase 1 Pilot and a key component of SCE’s efforts to encourage EV adoption by supporting the installation of charging infrastructure, emphasizing historically underserved customers living in MUDs and within designated DACs. The CRLD Program includes the Make Ready Expansion Program, the DCFC Program, the Charge Ready NCR Program, and the TEAS Program, which, combined, aim to support the installation of approximately 30,000 EV charging ports in SCE territory. The goal of these efforts includes installations from Phase 1 Pilot applications and schools and parks.⁵

- **Make Ready Expansion Program.** SCE provides options for financial support to the utility-side and customer-side of the meter-supporting infrastructure (also called Make Ready), and provides rebates for charging equipment for public, workplace, MUDs, and fleet charging. Per the Decision, CPUC approved funding to install 22,200 ports for the Make Ready Program.⁶ SCE offers four different participation options under this component. The first two are as follows:
 - **CIR Program.** SCE provides both the utility-side and customer-side of the meter-supporting infrastructure. CIR may also offer eligible participants a rebate to offset the purchase and installation costs of SCE-approved charging equipment. Note that not all CIR applicants are eligible for charging equipment rebates.
 - **CSMR Program.** SCE provides the utility-side of the meter-supporting infrastructure, and the participant designs and installs the customer-side of the meter-supporting infrastructure. CSMR rebates offset up to 80% of the costs SCE would otherwise incur for performing the customer-side infrastructure work or 80% of the customer’s actual cost, whichever is less. CSMR may also offer eligible participants a rebate to offset the costs associated with the purchase and installation of SCE-approved charging equipment. Similar to the CIR Program, not all CSMR applications are eligible for charging equipment rebates.

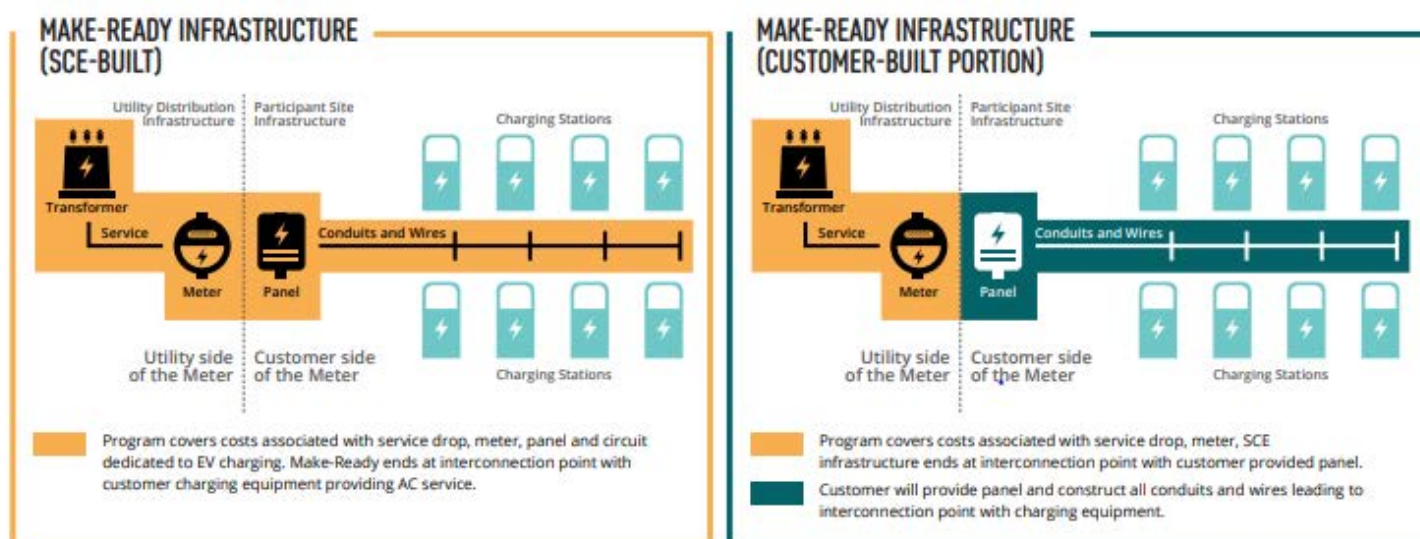
SCE’s CRLD Program Guidelines illustrate the CIR and CSMR Program options (Figure 1). If the customer chooses to self-install the infrastructure on the customer-side of the meter (as shown in the graphic on the right in GREEN), they will qualify for the CSMR rebate.

Figure 1. CRLD Infrastructure Program Option Delineation

⁴ D. 16-01-023, p. 2; Application (A.) 14-10-014, pp. 1-2.

⁵ D. 19-11-017, Ordering Paragraph (OP) 6, p. 78

⁶ D. 20-08-045, Findings of Fact 29, p. 135.



Source: [SCE CRLD Program Guidelines](#)

- SCE also offers two additional program options under the Make-Ready Expansion Program.
 - **Turn-key.** SCE will install, own, and operate up to 2,500 charging stations for existing MUDs located in DACs where cost would be a barrier to installation. There is also a maintenance and networking rebate option under the Turn-key installation option. This rebate option is only available to MUDs in DACs that choose not to participate in the Turn-key option and prefer to own and operate the charging stations. These participants would enroll in CIR and receive this one-time rebate to offset the maintenance and networking fees associated with owning and operating L2 charging equipment.
 - **SSR Program.** This CRLD Program offering provides rebates to MUD, public sector, and commercial sites choosing to install four or fewer L2 charging station ports. This rebate option is available to participants who design, purchase, and install the customer-side of the meter infrastructure work. The SSR Program provides participants with a fixed rebate of up to \$10,000 per port.
- **Make Ready DCFC Program.** In April 2024, SCE began accepting applications for the DCFC Program, which provides financial incentives for L3 charging stations (i.e., direct current or DC fast charging stations). This program installs the utility-side of the meter infrastructure and additionally provides incentives for the customer-side of the meter infrastructure work and requires a minimum of two ports. Charging equipment rebates are also available to help offset the costs associated with the purchase and installation of qualifying charging equipment. The DCFC Program has limited availability, and the program has a goal, based on the Decision, to install 205 DCFC ports during the program cycle.⁷
- **NCR Program.** This CRLD Program offers rebates to SCE customers building new MUD sites that exceed the current mandatory CALGreen EV Capable Code requirements or relevant local requirements by installing charging stations above what is required in the code. The program provides rebates of up to \$3,500 per port for the installation of the customer-side make-ready electrical infrastructure work and L2 charging stations that go above and beyond the CALGreen Code requirements. Applications for the NCR Program were accepted through July 12, 2025.
- **TEAS Program.** The TEAS Program provides support and education to customers interested in TE. These services provide customers with a no-cost consultation with an SCE TE advisor who provides information on site planning, parking considerations, EV funding, EVSE infrastructure, rates, managed charging, and more. These consultations aim to help customers build a business case that supports an electrification investment in infrastructure. In addition

⁷ D. 20-08-045, p. 22.

to tailored consultations, the Program offers load management plan consultations, educational webinars and self-service online tools. The program specifically supports commercial EV customers, including small and medium businesses, school and municipal government fleets, and multifamily property owners.

- All charging station equipment must be listed on SCE’s approved product list and be networked, and participants must maintain the equipment for ten years. Participants are also required to send utilization and pricing data to SCE for ten years. Additionally, participants in any CRLD Program offering are required to enroll in an applicable time-of-use (TOU) rate and demand response (DR) program.

2.2 Key Program Changes

In 2025, the CRLD program team implemented three major changes along with several minor updates. First, the NCR Program sunset in mid-2025, and applications officially stopped being accepted on July 12, 2025. Current applicants have up to 36 months from their reservation of funds date to install chargers and submit rebate requests. Second, in December 2025, the CPUC issued a decision requiring the CRLD Program team to receive fully executed Make Ready Expansion and DCFC program customer agreements by 11:59 p.m. on December 31, 2026.⁸ To ensure sufficient time for site assessments and issuance of agreements, the program team set a new application submission deadline of June 30, 2026. This shift impacts CIR, CSMR, SSR and DCFC Programs. This resolution replaced the previous decision (Advice Letter 5334-E), which allowed applications to be submitted through the end of 2026. Third, in response to customer feedback, the DCFC Program raised the charger maximum output from 150 kilowatts to 350 kilowatts.

The CRLD Program also implemented two minor enrollment changes in 2025 to streamline the application process and comply with CPUC program goals. Consultation reviews allow the customer to meet with their assigned account manager to discuss the program and verify that the information they submitted in the application is still accurate. For CIR, CSMR, and SSR projects these reviews are now conducted over email rather than a virtual meeting. Applicants now receive an email outlining key program details and must confirm their understanding and eligibility before advancing to the site assessment. Lastly, the CRLD Program re-implemented the non-DAC application waitlist. The non-DAC waitlist is periodically reviewed for program viability. This change was implemented to avoid oversubscription of available funds and to support the DAC reasonableness metric.

2.3 Budget and Goals

The total budget for the CRLD program is \$436 million, which includes \$417.5 million for charging infrastructure.⁹ SCE designed the CRLD program to support California's goal of reducing GHG emissions and criteria pollutants by expanding EV charging infrastructure. This includes increasing the availability of charging stations at workplaces, destination centers, fleet parking locations, DACs, and MUDs. Table 1 shows the percentage of ports SCE is aiming to install in DACs and MUDs by the end of the CRLD Program cycle.

Table 1. Program Port Targets

	DACs	MUDs
Make Ready: CIR & CSMR & SSR	50%	30%
Make Ready: Turn-key	100%	100%

⁸ D. 25-12-005, p. 20.

⁹ D.20-08-045, p. 2.

Make Ready: DCFC	30%	25% ¹⁰
NCR	50%	100%

2.4 Procedural History

On October 30, 2014, SCE filed Application (A.) 14-10-014 for the Charge Ready Pilot Program, the first phase of TE Programs, and the predecessor to Charge Ready 2 (the subject of this evaluation report).¹¹ The CPUC approved the Pilot Program in Decision (D.) 16-01-023 in 2016.¹² On March 5, 2018, SCE filed a petition for modification requesting an additional \$22 million in bridge funding to avoid a gap in program availability between the Charge Ready Pilot Program and the future launch of the full CRLD Program. On December 21, 2018, the Commission issued D.18-12-006, which granted SCE’s petition for modification, authorizing the additional funding for a Charge Ready Bridge Program.¹³

On August 27, 2020, the CPUC issued D. 20-08-045, Decision Authorizing Southern California Edison Company’s Charge Ready 2 Infrastructure and Market Education Programs. This Decision approved SCE’s full CRLD Program, referred to as Charge Ready 2 in the decision, which supports California’s GHG emissions reduction goals by adopting TE. Ordering paragraph 30 of the decision required SCE to file annual reports beginning one year after it was initially adopted (i.e., August 27, 2021).

As a subset of the Make Ready Expansion, D. 20-08-045 authorized SCE to offer a “low port rebate” to participants with sites installing four or fewer L2 ports. In response, SCE filed a Tier 2 Advice Letter 4480-E on April 27, 2021, which sought approval of a proposed, one-time \$5,000 per port rebate payable to customers that installed four or fewer L2 charging stations.¹⁴

The CPUC approved the proposal, with modifications specified in Resolution E-5227, issued on October 20, 2022. According to this Resolution, SCE must “include customer and utility-side costs for participating sites as part of the originally allocated funds from the \$333 million Commission-approved budget for the Make Ready Expansion Program and to maintain a \$16,000 per port cap which includes customer and utility-side costs.”¹⁵ This subset of the Make Ready Expansion Program was subsequently renamed the Small Site Rebate (SSR) Program, and launched in March 2023. According to SCE’s website, the SSR Program provides a rebate to cover customer costs of up to \$10,000 per port for approved sites that install up to four L2 ports, with another \$6,000 per port used to cover any utility-side upgrades if necessary.¹⁶

D. 20-08-045 also authorized SCE to offer a DCFC Program. In response, SCE submitted a Tier 3 Advice Letter 4433-E on March 4, 2021, providing updated budget, port, and site counts.¹⁷ On March 31, 2023, SCE submitted a supplemental Advice Letter 4433-E-A.¹⁸ In the original Advice Letter 4433-E, SCE discussed how customers may have limited interest in the site-host ownership option. However, in Advice Letter 4433-E-A, SCE stated that it reassessed the efficacy of offering a DCFC site-host ownership option and, upon launching the DCFC Program, would target the majority of the DCFC Program’s

¹⁰ For DCFC, the CPUC defined MUD-serving sites as being located within a two-mile radius of six or more residential MUDs.

¹¹ SCE, *Application 14-10-014, filed with the CPUC*, approved October 30, 2014.

¹² D. 16-01-023, p. 2.

¹³ D. 18-12-006, p. 1.

¹⁴ SCE, *Advice Letter 4480-E: Southern California Edison Company’s Charge Ready 2 Low Port Rebate Program*. October 28, 2022, p. 2.

¹⁵ CPUC, *Resolution 5227: Approving Southern California Edison Company’s Advice Letter 4480-E, Low Port Rebate Proposal for the Charge Ready 2 Program*. October 20, 2022. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M496/K876/496876103.PDF>, pp. 1-2.

¹⁶ SCE, Small Site Rebate Program. <https://www.sce.com/business/smart-energy-solar/charge-ready/small-site-rebate>.

¹⁷ SCE, *Advice Letter 4433-E: Southern California Edison Company’s Charge Ready 2 DCFC Site Prioritization Criteria, Updated Budget, Port and Site Count Targets*. March 4, 2021.

¹⁸ SCE, *Advice Letter 4433-E-A: Southern California Edison Company’s Charge Ready 2 DCFC Site Prioritization Criteria, Updated Budget, and Port and Site Count Targets*. March 31, 2023.

projects to use this site-host ownership option. Moreover, in the supplemental advice letter, SCE provided estimated site and port counts and information regarding project cost-effectiveness in the section “The Number of Ports and Sites SCE will target through the DCFC component of the Make Ready Expansion program.”¹⁹ Specifically, SCE stated, “due to the costly nature of infrastructure upgrades associated with higher-powered DCFC stations versus L2, it is likely that sites with four or more DCFC ports will be significantly more cost effective per port than 2-port sites where the cost is spread over fewer ports. It is likely that the program will install an estimated 50-60 sites as there will be fewer 2 port sites accepted into the program due to cost constraints and some participants may choose to install a greater number of ports, therefore reducing site counts.” Moreover, SCE communicated that it does not anticipate installing more than 205 ports “due to limited funding and increased cost since SCE submitted the initial Advice Letter 4433-E on March 4, 2021.” The CPUC approved Advice Letter 4433-E (as amended by Advice Letter 4433-E-A) with an effective date of November 2, 2023. Per the Decision, approximately \$14 million has been allocated to the Program, comprising approximately \$8.5 million for charging infrastructure and \$5.5 million for charging station rebates.^{20,21} SCE began accepting applications to the DCFC Program on April 1, 2024.

On July 12th, 2024, SCE filed for an extension of application acceptance for SCE’s Charge Ready 2 Infrastructure and Market Education Programs (Advice Letter 5334-E).²²

SCE found that more time was needed for customer applications due to the introduction of the DCFC Program and “several factors including market conditions, supply chain disruptions, and customer challenges.” This Advice Letter request was approved on September 13, 2024. Per a decision issued on December 4, 2025, the CRLD Program will receive applications through June 30, 2026, with full executed agreements by December 31, 2026.²³

2.4.1 Charging Station Requirements

In August 2022, the CPUC adopted EVSE communication protocols via D.22-08-024 as minimum qualification requirements for all EVSE installed via ratepayer funding or through an investor-owned utility (IOU)-administered program. Per this decision, all EVSE deployed on or after July 1, 2023, must be capable of the following:^{24, 25}

- All alternating current (AC-) conductive EVSE for light-duty use cases must have an SAE J1772 connector.
- All direct current (DC-) conductive EVSE deployed for light-duty use cases must be equipped with a CCS connector.
- For all EVSE, communications and controls between a network service provider and the EVSE shall be capable of operating on OCA OCPP 1.6 or later.
- All EVSE must be International Organization for Standardization (ISO) 15118 ready and equipped with onboard hardware that enables high-level communications with the vehicle using ISO 15118. An ISO 15118-ready charger is capable of, at minimum, (1) a powerline carrier-based high-level communications as specified in ISO 15118-3; (2) secure management and storage of keys and certificates; (3) Transport Layer Security version 1.2, with additional support for Transport Layer Security 1.3 or subsequent versions recommended to prepare for future updates to the

¹⁹ D. 20-08-045 directs SCE “to build at least 205 ports” with a minimum of 2 ports per site, p. 85.

²⁰ CPUC, *Resolution E-5290: Approving Southern California Edison’s Plan for Site Prioritization, Budget, and Charging Port Targets for Direct Current Fast Charging Component of Charge Ready 2 Program*. November 2, 2023.

²¹ SCE, [DCFC Program Guide](#), p. 3.

²² SCE, *Advice Letter 5334-E: Notice of Timeline Extension Pursuant to Decision 22-11-040 Ordering Paragraph 2 for SCE’s Infrastructure Programs Included in the Charge Ready 2 Infrastructure and Market Education Programs*. July 12, 2024.

²³ D. 25-12-005, p. 20.

²⁴ D. 22-08-024, OP 6, p. 45.

²⁵ CPUC Vehicle-Grid Integration (VGI) Policy, Pilots, and Technology Enablement. <https://www.cpuc.ca.gov/vgi/>.

ISO 15118 standards; (4) receiving remote updates to activate or enable ISO 15118 use cases; (5) connection to a backend network; and (6) selecting the appropriate communication protocol used by the vehicle.

The CRLD Program cannot accept any customer Proof of Procurement documents for equipment procured on or after July 1, 2023, that is not ISO 15118-compliant. Any equipment procured by customers prior to July 1, 2023, does not need to be ISO 15118-compliant and is exempt from the D.22-08-024 minimum equipment qualifications for the CRLD Program.

2.5 Implementation Timeline

SCE launched the CRLD Program in July 2021 with a robust customer engagement effort. This effort included SCE account managers directly contacting customers about the CRLD Program, customer training sessions to introduce the CRLD Program to potential applicants, distributing marketing materials to SCE customers, and more. SCE also held mandatory live virtual training sessions for trade professionals who wanted to join the CRLD Program's Trade Professional Network and submit applications on behalf of customers.

From launch through the end of 2025, the CRLD Program, in particular the Make Ready program options, has received consistently high market demand. This market demand remained high even after SCE sunset the charging station rebate offering in 2022 because the infrastructure coverage substantially reduces construction costs and is not typically covered by other EV charger incentive mechanisms in the market. In response to this high demand, SCE created an application waitlist for the Make Ready program that was active from September 2022 until early 2024. To ensure the CRLD Program met its DAC port installation targets, SCE waitlisted non-DAC applications for the CIR, CSMR, and Turn-key Installation option. The waitlist was monitored to ensure non-DAC applicants were only accepted to the degree the program meets DAC port requirements. Note that the SSR Program offering, a component of Make Ready, did not have an application waitlist and accepted both DAC and non-DAC applications. During the 2024 program year, staff removed the waitlist and reopened applications to non-DAC sites. In 2025, the non-DAC application waitlist was re-instated. SCE initially filed a request for an extension of the NCR Program in light of "external factors and delayed program uptake" on July 12, 2023 (Advice Letter 5073-E), which was denied.²⁶ Therefore, the NCR program stopped accepting applications on July 12 of 2025. In December of 2025, the CPUC issued a decision requiring the CRLD Program to receive fully executed agreements from customers by 11:59 p.m. on December 31, 2026.²⁷

2.6 Application Pipeline

SCE re-instated the waitlist for non-DAC applications in 2025 and saw a decrease in applications for almost all program offerings. To comply with CPUC requirements, the program prioritized DAC applications throughout 2025. The program team also prioritized the NCR Program to increase additional applications before the program sunset on July 12, 2025.

Applications for the CRLD Program were assigned varying statuses according to their current stage in the application process. Each program has several tasks associated with the process and is further detailed in Section 4.2. Below are the definitions for the various statuses applicable to CRLD applications. Several definitions vary slightly depending on the program and its associated sub-tasks, as detailed below.

- **Total applications:** Total applications include all applications that enter the pipeline, excluding applications that the customer has not formally submitted. The total application count includes active applications in the pipeline as well as rejected, withdrawn, or voided applications.

²⁶ SCE, *Advice Letter 5073-E: Annual Charge Ready Report on the Effectiveness of the New Construction Rebate Program and Seeking a Program Extension Pursuant to Decision 20-08-04*. July 12, 2023.

²⁷ D. 25-12-005, p. 20.

- **Number of ports requested:** The number of ports requested by the applicant in the initial application submission. The total number of ports requested is associated with the total number of applications submitted.
- **Active applications and ports:** Applications that are in the CRLD pipeline and have not been voided, rejected, or withdrawn, and the number of requested or committed ports (depending on the stage in the pipeline) associated with those applications.
- **Completed site:** A site is completed when it reaches a certain threshold in the application process that renders it “complete” from the program team's perspective. This does not indicate the site is operational; rather, it signifies successful completion of the various application stages. This threshold differs across the different program options since the structure of the application pipeline differs across program options.
 - **CIR:** SCE has completed installation of the make-ready infrastructure, and the commission Date data field has been populated in the construction task.
 - **Turnkey:** SCE has completed installation of the make-ready infrastructure (commission date field has been populated) and SCE has completed installation of the SCE-owned charging stations.
 - **CSMR:** SCE has completed energization of the utility-side infrastructure and energized Date data field has been populated in the construction task.
 - **NCR:** If the Application Status is “Request payment” and the Form status is “Completed.”
 - **SSR:** If it is an existing service, the Charger Installation Completed Date is used. For new services, the electrical finish actual date is used.
 - **DCFC:** SCE has completed energization of the utility-side infrastructure and energized Date data field has been populated in the construction task.
- **Committed ports:** Committed ports are those for which a customer has signed a CRLD Program agreement, and SCE has reserved funds. The counts of committed ports do not include applications where the customer withdrew from the CRLD Program after signing the program agreement.

Table 2 summarizes program participation by CRLD Program offering. The table presents information on applications, sites, and ports moving through the application process for the various CRLD Programs. Counts of cumulative activity are provided through both the 2024 and 2025 program years as applications typically span multiple program years.

In 2025, the CRLD Program received 293 applications, a decrease from the 1,010 applications submitted during 2024. Among all program offerings in 2025, SSR received the highest number of applications with 160 applications, followed by CSMR, which received 60 applications. The NCR Program received 22 applications during 2025, nearly the same amount it received in all of 2024, before it sunset in July. Further, the cumulative number of requested ports nearly doubled, increasing from 4,870 to 7,250, reflecting the emphasis on applications with higher port counts. The program offering with the highest number of ports requested in 2025 was CSMR with 2,810 ports requested.

The CRLD Program continued to advance projects, completing a total of 190 sites in 2025. The CIR Program experienced the highest number of completed sites, finishing 94 sites in 2025. From program inception through the end of 2025, the CRLD Program has completed a cumulative total of 425 sites.

No DCFC sites were completed in 2025, but at year end, 20 sites for a total of 135 ports were committed to the program. Sites progressed through agreement and design throughout the year, and construction on DCFC sites are expected to begin in 2026.

Table 2. Cumulative Program Participation for Program Years 2024 and 2025

Program Option	Total Applications		Active Applications		Number of Applications Rejected/ Withdrawn/Voided		Number of Completed Sites		Number of Requested Ports		Number of Ports in Active Applications	
	Cumulative 2024	Cumulative 2025	Cumulative 2024	Cumulative 2025	Cumulative 2024	Cumulative 2025	Cumulative 2024	Cumulative 2025	Cumulative 2024	Cumulative 2025	Cumulative 2024	Cumulative 2025
Make Ready: CIR	2,091	2,131	417	405	1,674	1,726	148	242	41,600	42,681	9,943	9,730
Make Ready: CSMR	1,378	1,438	549	340	829	1,098	43	70	34,942	37,752	15,871	10,278
Make Ready: Turn-key ^a	92	96	57	58	35	38	13	31	1,964	2,142	1,473	1,509
Make Ready: SSR	403	563	234	306	169	257	6	48	1,492	2,036	869	1,103
Make Ready: DCFC	218	226	141	108	77	118	0	0	1,932	1,977	1,124	877
NCR	119	141	101	104	18	37	25	34	4,870	7,250	4,011	5,734
Totals	4,301	4,595	1,499	1,321	2,802	3,274	235	425	86,800	93,838	33,291	29,231

^aSome applications and associated ports for Turn-key also include CIR or CSMR projects that are eligible for the maintenance and networking rebate.

Table 3 presents CRLD Program participation across various CRLD Program offerings, categorized by DACs and MUDs, and shown cumulatively (i.e., from the CRLD Program launch through the end of 2025). A key component of the CRLD Program's diversity and inclusion efforts is to ensure a level of participation from DACs and MUDs. Please note that some MUDs are in DACs; therefore, these categories are not mutually exclusive.

Table 3. CRLD Applications, Completed Sites, and Number of Ports - Cumulative

Program Option	Total Applications			Active Applications			Number of Applications Rejected/ Withdrawn/Voided			Number of Completed Sites			Total Ports			Active ports		
	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD
Make Ready: CIR	700	594	893	178	63	164	522	531	729	109	43	90	14,767	11,708	17,576	4,174	886	4,670

Program Option	Total Applications			Active Applications			Number of Applications Rejected/ Withdrawn/Voided			Number of Completed Sites			Total Ports			Active ports		
	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD	DAC	MUD	Non-DAC/ MUD
Make Ready: CSMR	395	989	310	137	266	35	258	723	275	5	50	15	12,241	27,949	5,719	4,888	8,595	739
Make Ready: Turn-key	96	96	0	58	58	0	38	38	0	31	31	0	2,142	2,142	0	1,509	1,509	0
Make Ready: SSR	170	255	190	92	128	119	78	127	71	11	22	17	595	883	712	317	424	453
Make Ready: DCFC ^a	97	0	129	49	0	59	48	0	70	0	0	0	941	0	1,036	449	0	428
NCR	40	141	0	35	104	0	5	37	0	12	34	0	1,949	7,250	0	1,687	5,734	0
Totals	1,498	2,075	1,522	549	619	377	949	1,456	1,145	168	180	122	32,635	49,932	25,043	13,024	17,148	6,290

Note: Some sites are qualified as DACs and MUDs; therefore, they are reported in columns for both market segments.

^a SCE's DCFC Program has limited availability, and MUD customers are ineligible for the program because all chargers must be publicly-accessible. As such, SCE has established criteria for acceptance into the program based on projected costs, location (i.e., DAC status), and proximity to MUDs, among other considerations, to align with the goal of the program to provide access to fast charging to a higher concentration of residential customers who live and work in DACs and live in MUDs.

Table 4 displays the percentage of ports committed in 2025 in DACs and/or MUDs. In 2025, SCE prioritized applications for the Make Ready Program’s CIR and CSMR from sites located in DACs. The share of DAC ports committed under those Make Ready offerings in 2025 was 78%. In 2025, 44% of the NCR Program’s committed ports were located in DACs. The cumulative committed ports rose from 22% at the end of 2024 to 29% at the end of 2025. The program sunset in July of 2025 will ultimately fall short of the NCR Program offering cumulative 50% DAC target.

Table 4. Percentage of Ports Committed in DACs and MUDs (committed ports) - 2025

Program Option	2025 Committed Ports	
	DACs	MUDs
Make Ready: CIR & CSMR & SSR & Turn-key (N= 3,795 ports)	76%	64%
CIR & CSMR (N=3,328 ports)	78%	65%
SSR (N=354 ports)	44%	44%
Turn-key (N=113 ports)	100%	100%
NCR (N= 1,990 ports)	44%	100%
DCFC (N=135 ports)	41%	0%

Note: Committed ports are based off the Reservation of Funds Date.

Table 5 shows the percentage of the 23,357 ports for the various CRLD Program offerings to date committed to DACs and associated with MUDs. Fifty-five percent of all ports committed through the Make Ready Program are in DACs (53% were located in DACs at the end of 2024). SCE saw an increase in the cumulative 2025 committed ports for the Make Ready offerings in MUDs as compared to the end of 2024, from 44% to 49%.

Table 5. Percentages of Ports Committed in DACs and MUDs (committed ports) - Cumulative

Program Option	Cumulative Committed Ports	
	DACs	MUDs
Make Ready: CIR & CSMR & SSR & Turn-key (N= 17,488 ports)	55%	49%
CIR & CSMR (N=15,078 ports)	53%	44%
SSR (N=901 ports)	30%	39%
Turn-key (N=1,509 ports)	100%	100%
NCR (N= 5,734 ports)	29%	100%
DCFC (135 ports)	41%	0% ^a

^aThis is representative of applications associated with MUDs, not MUDs-serving sites. For additional information about committed DCFC sites and their relation to MUD densities see Section 5.

Table 6 displays the cumulative counts of completed sites and installed ports by program option from the launch of the CRLD Program in 2021 through 2025. As of December 31, 2025, no DCFC sites have been completed.

Table 6. Completed Sites and Port Installations by Program Option - Cumulative

Program Option	Completed Sites	Installed Ports
Make Ready: CIR	242	4,809

Make Ready: CSMR	70	1,056
Make Ready: SSR	48	177
Make Ready: Turn-key	31	710
NCR	34	929

3. Marketing, Outreach, and Education Efforts

In the beginning of 2025, the CRLD Program paused external marketing in response to the Eaton fire that caused widespread destruction in Los Angeles County throughout January. Marketing efforts resumed in April 2025 with email campaigns and paid social media advertisements particularly targeting DACs. From April through July 2025, marketing and outreach efforts prioritized the NCR Program to increase the number of applications before the July 12, 2025 application deadline. Throughout the remainder of the year, marketing efforts shifted to promoting all CRLD Program offerings. These efforts included advertising, paid social media advertising, email marketing, and account management outreach. Toward the end of 2025, the program team began developing an updated market plan. This new market plan is scheduled to launch in early 2026 and aims to increase the number of applications ahead of the June 30, 2026 submission deadline.

Outside of mass marketing efforts, account managers regularly conducted outreach to their assigned segments and prioritized multiple touch points. They used phone calls, emails and site visits to engage customers and drive participation. At the end of the third quarter of 2025, they also launched a small outreach campaign aimed at both DAC and general applicants.

Throughout 2025, SCE continued to strengthen relationships with trade professionals entering the program. SCE held three quarterly training sessions for new trade professionals entering the program, focusing on program onboarding, the application process, and using the TradeAlly Connect Portal. SCE also conducted one DCFC specific training. As a result of these training efforts, the CRLD Program added 85 new trade professionals in 2025.

During the same time period, the account manager trade professional team increased engagement through more frequent touch points with existing trade professionals and individualized one-on-one trainings sessions for new trade professionals. During these one-on-one meetings, SCE worked with trade professionals to improve skill level with AutoCAD file requirements and site plan submissions. SCE also held bi-weekly meetings with trade professionals that have larger pipelines of projects. During these meetings they reviewed project statuses and coordinated to ensure that projects would satisfy pre- and post-installation requirements.

Additional focused outreach and educational activities during the 2025 program year included:

- Updates to the CRLD website to reflect the most current program information, including prompt updating of time frames as the NCR Program sunset;
- Bulletin communications to the trade professional delivery channel to communicate program updates and changes; and
- Two webinars for trade professionals and five public webinars for customers interested in the NCR Program.

4. Program Metrics

This section presents customer requirements necessary to qualify for the CRLD Program, the location of committed ports by industry sector, and metrics that demonstrate the performance of the CRLD Program.

4.1 Participant Selection Criteria

As noted in SCE's First Annual Charge Ready 2 Report, customer applicants must meet several eligibility criteria to qualify for the CRLD Program:²⁸

- Be a non-residential SCE customer.
- Own, manage, lease, or be the customer of record of the property in SCE's service area where chargers are installed.
- Obtain consent to install chargers from the property owner if the applicant is not the property owner.
- Enroll in an applicable TOU rate plan and DR Program.
- Select, purchase, and install SCE-approved charging equipment (note that all charging stations are required to be networked).
- Operate and maintain charging equipment for a minimum of ten years.
- For the ten-year duration, provide data related to charging equipment usage to SCE (including prices charged to EV drivers using the charging stations).
- Provide a property easement for SCE's infrastructure.
- Agree to additional CRLD Program terms and conditions.

Participants must submit their applications for the CRLD Program through an online application portal. Applicants provide their name, site address, requested port count, proposed site layout, and other relevant information for a potential Charge Ready project. Each submission, excluding SSR and NCR applications, requires applicants to include at least four L2 charging ports or two L3 charging ports if applying for the DCFC Program. No L1 chargers are on the Approved Product List due to not having the required networking capabilities. Applicants are removed from consideration if they do not meet the basic eligibility requirements stated above. SCE account managers conduct individual customer consultations for each site to review the eligibility requirements, CRLD Program requirements, proposed site layout and port count, easement and agreement language, and electrification plans. SCE recommends that applicants review the approved product list early and discuss the potential equipment options and pricing with vendors before they sign an official CRLD Program agreement.

SCE also performs initial cost analysis, including potential construction costs and desktop and on-site assessments to review the project feasibility. SCE evaluates each application using several criteria and decides whether to approve it for inclusion in the CRLD Program. The critical information includes overall costs for the site, average per-port costs, CRLD Program objectives such as DAC and MUD goals, overall site viability, availability of charging in the region, and the level of remaining CRLD Program funds.

SCE will also assess the applicant's ability to meet timing requirements for charging station procurement and installation, as well as post-installation CRLD Program terms.

²⁸ *Southern California Edison Company's First Annual Charge Ready 2 Report*, Application 18-06-015, filed July 5, 2022, California Public Utilities Commission., Accessed [here](#).

For the DCFC Program, SCE uses specific site selection criteria to meet CPUC requirements and to ensure projects are completed on time and within budget.²⁹ The program team reviews incoming applications and prioritizes stations located at or near short-term dwell locations, major highways, and MUDs.³⁰ To evaluate whether proposed sites meet these priorities, the program team uses Google Maps to evaluate distances. Although most of these priorities do not have formal distance requirements, the team applies professional judgement when assessing site suitability. However, the CPUC defines MUDs-serving sites under the DCFC Program as sites within a two-mile radius of six or more residential MUDs. The program team also prioritizes sites with DAC status to support CPUC goals. In addition, the project team estimates overall site feasibility by reviewing project cost estimates, expected construction timelines to ensure completion by the end of 2027, and the ability to meet code compliance.

4.2 Participation Process and Timeline

Customers submit applications to the CRLD Program that include a high-level site plan and equipment layout. SCE’s eMobility team conducts an initial screening to ensure the customer qualifies for the CRLD Program and that the application is complete. Following this, SCE conducts a consultation review to confirm application details, followed by a site assessment. As part of the site assessment, SCE’s Transportation Electrification Project Management (TEPM) project manager uses Google Earth and internal mapping systems to identify existing infrastructure in the area that could potentially serve as a power source for the site. After this desktop review, if there are no initial issues with the site identified, an on-site assessment is typically required to confirm site conditions. The remaining stages include the customer signing an agreement to reserve funds, customer submission of proof that the customer has ordered the charging infrastructure equipment, final site design and permitting, and site construction. The CRLD Program conducts on-site inspections of all infrastructure and charging stations for proper installation specifications to ensure safety. The final stage is the payout of the incentive payment if the customer qualifies for one. Table 7 outlines the stages of CIR and CSMR projects.

Table 7. Descriptions of CIR and CSMR Project Stages

Project Stage	Description
1. Customer Application Submission	Customer creates and submits an application. While the customer is creating the application, it is not active until the customer officially submits it. Then, it enters into the eMobility Application Screening.
2. eMobility Application Screening	SCE reviews the application for completeness. SCE determines the DAC status of the application. When the application is in this stage, it is considered active.
3. Customer Engagement Division (CED) Customer Consultation Review	The customer conducts a consultation review with their assigned account manager to discuss the program and verify that the information they submitted in the application is still accurate. Customers may change their application(s), including charging station location and port count requested.
4. TEPM Site Assessment	The field project manager completes a desktop review. The field project manager completes a site assessment if the desktop review does not disqualify the applicant; some sites are sent back to Task 3 for rejection or updating based on the desktop review. The field project manager creates a conceptual design and cost estimate for the site.

²⁹ Resolution E-5290, OP 5, p. 21.

³⁰ Short-term dwell locations include locations where the expected dwell times are two hours or less. Short-dwell locations can include mixed-use retail shopping centers, libraries, community centers, convenience stores, and grocery stores.

Project Stage	Description
5. eMobility Review and Approval	The eMobility project management team reviews the application to see if it meets program cost thresholds. This stage generates the most site rejections due to the cost limitations of the CRLD program.
6. Awaiting Customer Approval of Conceptual Design (CIR Only)	The customer reviews the conceptual design. If accepted, the customer moves to the next stage. The customer has 10 days to accept the conceptual design.
7. Agreement Preparation	The eMobility project management team prepares and sends the program agreement.
8A. Awaiting Customer Agreement	SCE sends the program agreement to the customer. The customer has 30 days to accept the agreement.
9A. Funds Reserved	The customer signs the program agreement and reserves funds for their site's construction.
8B. Waiting Proof of Procurement	A notice is sent to the customer to provide their proof of procurement for charging stations from SCE's approved product list. The customer has 45 days to provide a purchase order/receipt.
9B. CSMR Customer Site Plan Submission	CSMR Program customers must submit their site plan for the beyond-the-meter work they will complete.
10. TEPM Project Design	The project goes through the final design development.
11. Awaiting Customer Design Acceptance	The customer accepts the final design.
12. Project Requirements	After the final design is completed and approved by the customer, SCE requests necessary permits and sends easements to the property owner (who has 30 days to sign and return the easement).
13. Construction	Construction.
14. Pending Installation and Incentive Request	The customer submits a request for incentive payment with supporting documentation, including purchase and installation invoice and any permitting and inspection documentation; the customer installs charging stations.
15. Incentive Site Review	SCE completes site inspection.
16. Incentive Review	SCE reviews the incentive request for completeness.
17. Incentive Payment	SCE issues payment for the incentive (if applicable).

Table 8, Table 9, and Table 10 outline the project stages of the NCR, SSR, and DCFC projects.

Table 8. Descriptions of NCR Project Stages

Project Stage	Description
1. Project Submission	The customer creates and submits an application; SCE does not consider an application submitted until it reaches Reservation Review.
2. Reservation Review	SCE reviews the application for completeness; SCE confirms the DAC status of the application. If application meets the program requirements, funds are reserved.
3. Pending Installation and Incentive Request	The customer has 36-months to install the charging stations and request the incentive. Once chargers are installed and operational, the customer submits a request for incentive

	payment with supporting documentation, including purchase and installation invoices and any permitting and inspection documentation.
4. Incentive Site Review	SCE reviews requests for incentives for completeness and determines if a site inspection is required.
5. Incentive QA Review	SCE completes site inspection and determines if the installation has met all program requirements. If all program requirements are met, the applicant moves forward for incentive payment.
6. Incentive Payment Approval	SCE issues rebate payments to the customer.

Table 9. High-Level Descriptions of SSR Project Stages

Project Stage	Description
1. Customer Application Submission	The customer completes and submits the online application, which is accessed through the online CRLD Program enrollment portal. The application must include a Site Plan with the preferred location(s) of the charging equipment. This is the project submission phase, also called the project funding request.
2. SCE Screens Application	SCE receives and screens applications to determine initial eligibility for SSR Program participation. The customer must respond to any application-related inquiries from SCE. Once the application is in this stage, it is considered active.
3. SCE Infrastructure Assessment & Site Evaluation	SCE performs a site evaluation to collect information needed to evaluate the project further and develop a conceptual infrastructure design for customers seeking the installation of new meter service and make-ready infrastructure.
4. SCE Reservation of Funds	SCE reserves project funds once program application criteria are met and the participant has executed the program agreement.
5. Existing Service Assessment	The customer must evaluate existing service capacity and organize any necessary upgrades to support EV charger installation (for applications using existing service only).
6. Complete Site Design & Purchase EV Chargers (Existing Service Connection Participants)	The customer completes site design and performs any required upgrades to support EV charger installation and purchases EV chargers listed on SCE's approved product list. The customer must also submit a copy of the purchase order, paid invoice, or sales receipt for charging equipment to SCE. The customer must also submit a verification of panel inspection from the local AHJ.
7. Make Ready Design & Build (New Service Connection Participants)	Customers seeking to install new meter service and make-ready infrastructure complete additional steps. These involve the customer completing a detailed make-ready infrastructure design, providing approval for SCE's utility-side infrastructure design, granting an easement to SCE, securing relevant permits, and managing the construction of the customer-side infrastructure. SCE simultaneously completes any necessary utility-side infrastructure work and energizes the new site once the participant has completed construction and received all necessary AHJ approvals.
8. Install Charging Equipment	The customer installs the EV charging equipment.
9. Incentive Request Submission	The customer initiates an incentive request through the enrollment portal and must submit the associated documentation. The required documents include the final equipment purchase invoice, final invoices for charger installation, verification of any applicable final inspections/permits, and a completed Charging Equipment Registration form.
10. Incentive QA Review & Equipment Installation Verification	SCE reviews the incentive request and associated documentation for completeness. If complete, SCE verifies that the new service account is activated (if applicable) and performs a final installation verification.

Project Stage	Description
11. Incentive Payment	Following a final review of all required documentation and a site visit (if applicable), SCE initiates the rebate payment to the customer.

Table 10. High-Level Descriptions of DCFC Project Stages

Project Stage	Description
1. Customer Application Submission	Customer creates and submits an application. While the customer is creating the application, it is not active until the customer officially submits it. Then, it enters into the eMobility Application Screening.
2. eMobility Application Screening	SCE reviews the application for completeness. SCE determines the DAC status and MF proximity of the application. Once the application is in this stage, it is considered active.
3. TEPM Desktop Review	The field project manager completes a desktop review. The field project manager moves the application to CED Consultation review if the desktop review does not disqualify the applicant; some sites are sent back to Task 2 for rejection or updating based on the desktop review.
4. CED Customer Consultation Review	The customer conducts a consultation review with their assigned account manager to discuss the program and verify that the information they submitted in the application is still accurate.
5. TEPM Site Assessment	The field project manager continues the evaluation process by performing a physical site assessment. With the information collected during the site visit, the field project manager further evaluates the project feasibility and develops a conceptual infrastructure design (known as the T&D Narrative). An engineering capacity study is completed if needed (depending on the load request). The applicant cannot make any changes to the port count or site location after the site visit has been completed, unless instructed to do so by SCE.
6. Site Review & Agreement Preparation	The eMobility project management team reviews the application to see if it meets program cost thresholds and qualifies to move forward. If the project meets program criteria, cost thresholds, and other considerations, the eMobility project management team prepares and sends the program agreement along with the T&D narrative for the applicant to review. The Agreement outlines the Customer-Side Make Ready infrastructure and Charging Station rebate amounts the applicant is eligible to receive.
7. Awaiting Customer Agreement & Proof of Procurement	The customer has 60 days to accept the agreement and provide their proof of procurement for charging stations from SCE's approved product list.
8. Funds Reserved	The customer signs the program agreement and submits their proof of procurement for charging stations. Once the agreement and proof of procurement is approved, eMobility project management team reserves funds for the project.
9. Customer Site Plan Submission	Program participant must develop and submit their site plan for the beyond-the-meter work they will complete.
10. Site Plan Review	SCE reviews the submitted site plan to ensure completeness.
11. TEPM Project Design	The project goes through the final design completion.
12. Awaiting Customer Design Acceptance	The customer accepts the final design.
13. Project Requirements & Construction	After the final design is complete and approved by the customer, SCE requests necessary permits and sends easements to the property owner (who has 30 days to sign and return the easement). Participant is then responsible for managing and coordinating all customer-

Project Stage	Description
	side infrastructure related installation work and complying with labor and safety requirements. SCE is responsible for completing the utility-side infrastructure work.
14. Pending Installation and Incentive Request	The customer submits a request for incentive payment with supporting documentation, including purchase and installation invoice and any permitting and inspection documentation; the customer installs charging stations.
15. Incentive Site Request	SCE completes site inspection.
16. Incentive Review & Payment	SCE reviews the incentive request for completeness. SCE issues payment for the incentive.

Figure 2 presents the distribution of active CIR, CSMR, and Turn-Key Program applications that have been submitted to the CRLD Program and are moving through the application review process.

Figure 2. Active CIR, CSMR, and Turn-key Applications by Application Stage (Program Launch through 2025)

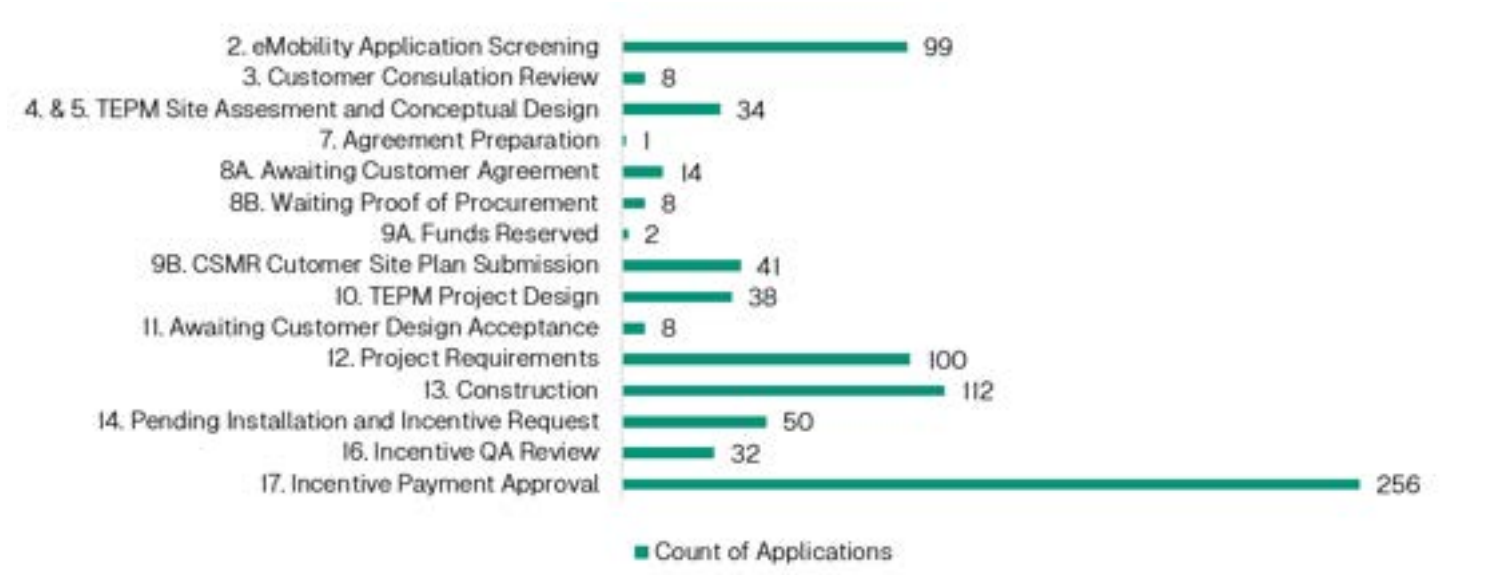


Figure 3 presents the distribution of active NCR applications that have been submitted to the CRLD Program and are moving through the review process. The NCR Program stopped accepting new applications on July 12, 2025, so applicants have 36 months from their Reservation of Funds date to install chargers and submit their rebate request.

Figure 3. Distribution of Active NCR Applications by Application Stage (Program Launch through 2025)

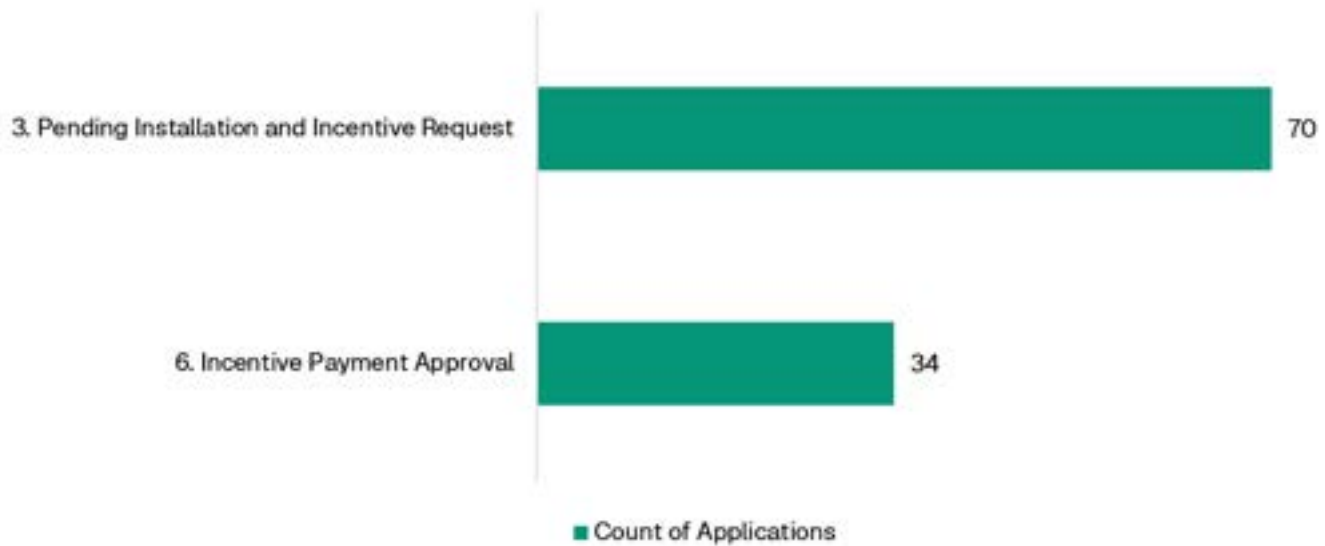


Figure 4 presents the distribution of active SSR applications that have been submitted to the CRLD Program and are moving through the review process.

Figure 4. Distribution of Active SSR Applications by Application Stage (Program Launch through 2025)



Figure 5 presents the distribution of active DCFC applications that have been submitted to the CRLD Program and are moving through the review process. Due to limited DCFC Program port availability (205 ports), many applications are on hold in 'Reservation Review' application stage, as the program processes 205 ports in application stage 3 and beyond.³¹

³¹ This is representative of the number of active ports in stage 3 and beyond.

Figure 5. Active DCFC Applications by Application Stage (Program Launch through 2025)



4.3 Site Activation Timelines

EV infrastructure projects are often complex and time intensive, and site-specific characteristics frequently drive project timelines. Key factors that can influence timelines may include when the utility was engaged in the project, property ownership structure, site capacity, the necessity of utility-side upgrades, and resource availability.³² For this evaluation, we analyzed cycle timelines by application phase for CIR and CSMR and categorized common delays experienced both by the CRLD Program and by similar programs.

SCE's eMobility team updates project dates at key milestones in the project stage (see section 4.2 for details) during the applications process. To support our analysis of site activation timelines, the evaluation team used standardized cycle time definitions that map project stages to different phases (Table 11 and Table 12). Our team only included completed sites with sufficient tracking data for CSMR and CIR in the analysis to avoid inclusion of applications that will be cancelled. The evaluation team also excluded a small number of projects with erroneous data where the program staff could not derive accurate project dates (e.g., projects early in the application process with data-entry issues, typos or lack of consistency).³³ Program staff noted that tracking practices have improved over time, and staff expect timeline estimates to become increasingly more accurate as additional sites reach completion. CSMR and CIR sites with Turn-key Maintenance and Networking rebates are also included in the analysis.³⁴ This analysis excludes NCR and SSR projects because they do not include SCE construction and function as rebate-only programs, where the customer must complete the work within a certain timeframe to receive the rebate.

This analysis also excludes the DCFC Program, as there are no completed sites as of December 31, 2025. Future evaluations will incorporate DCFC as sites reach completion.

³² [Electric-UtilityInterconnectionTimelinesforEVCharging-DiscussionDraft.pdf](#).

³³ A total of 35 sites were excluded from the final analysis.

³⁴ 14 CSMR sites with Maintenance and Networking rebates, and 12 CIR sites with Maintenance and Networking rebates were included in the final analysis.

Table 11. CSMR Project Phases Mapped to Stages

Application Phase	Stages Included CSMR
Application Screening	1. Customer Application Screening
	2. eMobility Application Screening
	3. CED Customer Consultation Review
Site Assessment	4. TEPM Site Assessment
	5. eMobility Review and Approval
Agreement Issuance	7. Agreement Preparation
Customer Activities	8A. Awaiting Customer Agreement
	9A. Funds Reserved
	8B. Waiting Proof of Procurement
	9B. CSMR Customer Site Plan Submission
Design	10. TEPM Project Design
Customer Design Acceptance	11. Awaiting Customer Design Acceptance
Permitting & Easement	12. Project Requirements
Construction	13. Construction
Activation & Incentive Request	14. Pending Installation and Incentive Request

Table 12. CIR Project Phases Mapped to Stages

Program Phase	Stages Included CIR
Application Screening	1. Customer Application Screening
	2. eMobility Application Screening
	3. CED Customer Consultation Review
Site Assessment	4. TEPM Site Assessment
	5. eMobility Review and Approval
Customer Design Approval	6. Awaiting Customer Approval of Conceptual Design
Agreement Issuance	7. Agreement Preparation
Customer Activities	8A. Awaiting Customer Agreement
	9A. Funds Reserved
	8B. Waiting Proof of Procurement
Design	10. TEPM Project Design
Customer Final Design Acceptance	11. Awaiting Customer Design Acceptance
Permitting & Easement	12. Project Requirements
Construction	13. Construction

Program Phase	Stages Included CIR
Activation & Incentive Request	14. Pending Installation and Incentive Request

As discussed above, multiple factors contribute to delays at each program phase. CRLD Program staff specifically noted experiencing customer-side delays for CIR and CSMR projects. During early project phases such as application screening, timelines may extend if the customer fails to reply promptly or if the application requires revisions. As seen in Table 13, the median application screening duration was 37 days for CSMR and 27 days for CIR to complete. To reduce delays, in 2025 SCE staff revised the consultation review from a virtual meeting to a review over email. Delays may also occur during the site assessment phase if there are challenges scheduling site visits with the applicant. Agreement issuance may be delayed if customers require Board or HOA approval, which may require more than 30 days to get approval. During the customer activities phase, where the median duration was 138 days for CSMR and 85 days for CIR, some customers must issue Request for Proposals (RFPs), which can take longer than the 45-day Purchase Order (PO) submission requirement. At this stage, SCE also confirms if the charger on the PO is on the Approved Product List (APL). If not, delays occur when customers need to resubmit the PO with approved chargers. Additional revisions may also be required to ensure the number of ports and chargers aligns with the approved site plan, which results in further delays. The phase with the longest median duration for both CIR and CSMR was permitting & easement, with 262 and 177 days, respectively. Projects may face delays during permitting & easement, particularly for government lands or state-owned property, which often entail additional approvals and regulatory requirements that extend cycle times. Even after construction is completed, projects may be delayed as they await inspection and release from the AHJ.

Construction had the second longest average duration for both CIR and CSMR, at 144 and 163 days, respectively. During construction, SCE experiences more control over the SCE-built component, but the SCE team cannot control conditions underground. Because most of the work is underground, crews sometimes encounter unexpected pipelines or site conditions which can delay building progress. Customer-side changes, such as revised requirements or permit modification may extend construction timelines. In certain cases, permitting inspectors may withhold final sign-off despite prior approval, creating additional delays. Finally, crew availability on the SCE-built side may also impact construction timing.

Table 13. Median Calendar Days by Phase for CIR and CSMR

Program Phase	Median Calendar Days for CSMR (n=76)	Median Calendar Days for CIR (n=232)
Application Screening	37	27
Site Assessment	60	131
Agreement	0	1
Customer Activities	138*	85
Design	157	135
Customer Design Approval	N/A	9
Customer Final Design Approval	N/A	69
Customer Design Acceptance	31	N/A
Permitting & Easement	177	262
Construction	163	144
Activation & Incentive Request**	25	92

Program Phase	Median Calendar Days for CSMR (n=76)	Median Calendar Days for CIR (n=232)
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*Note: Not all phases line up exactly between each program. Notably Customer Activities include an additional step for CSMR.

**Note: The Activation & Incentive Request phase is only representative of 180 sites for CIR and 71 for CSMR as there are some sites where construction and the site is energized but they are waiting for charging stations to be installed by the customer. Excluded sites are still pending activation.

Publicly available installation timelines from IOUs with similar programs were very limited. However, several utilities reported common sources of delays that they experienced. For example, in Puget Sound Energy’s (PSE) most recent Transportation Electrification Plan, PSE discussed experiencing portfolio-wide delays, citing delays related to equipment procurement, market instability, and implementation partner prioritization issues.³⁵ PG&E’s Schools & Parks Pilot programs experienced customer-side construction delays due to accommodating school breaks and busy season for parks. SDG&E’s Schools and Parks Pilot, in which the utility owns all the site infrastructure, experienced significant delays in NSP commissioning.³⁶ The following two examples are drawn from medium- and heavy-duty programs and are therefore not fully analogous to light-duty initiatives. Public Service Enterprise Group (PSEG) reported experiencing contracting and procurement delays during their Suffolk County Bus Make Ready Pilot, as well as customer-side delays due to concerns regarding equipment compatibility.³⁷ National Grid also experienced delays in their Make Ready Fleet program and noted both public and private fleets often experienced project delays related to service capacity upgrades.³⁸

4.3.1 CIR Timelines

For CIR projects, the average total time from application submission to incentive payment is 1,035 days, or approximately 2.8 years. As shown in Figure 6, permitting & easement takes the longest time (264 days).

The permitting & easement phase may experience delays due to AHJ review timelines and customer delays in executing required easements. Projects cannot advance to construction without both AHJ permit approval and customer easement execution. The construction phase represents the second longest average duration with an average 156 calendar days to complete. Construction may be delayed due to contractor availability and scheduling. Customers may also delay construction when they restrict work to non-operational periods, such as requiring installations at schools to occur only during summer months or holiday breaks. The design phase experiences the third longest duration taking on average 156 calendar days to complete. The CIR Program Design phase may experience longer cycle times as the program covers design for both the utility and customer-side.

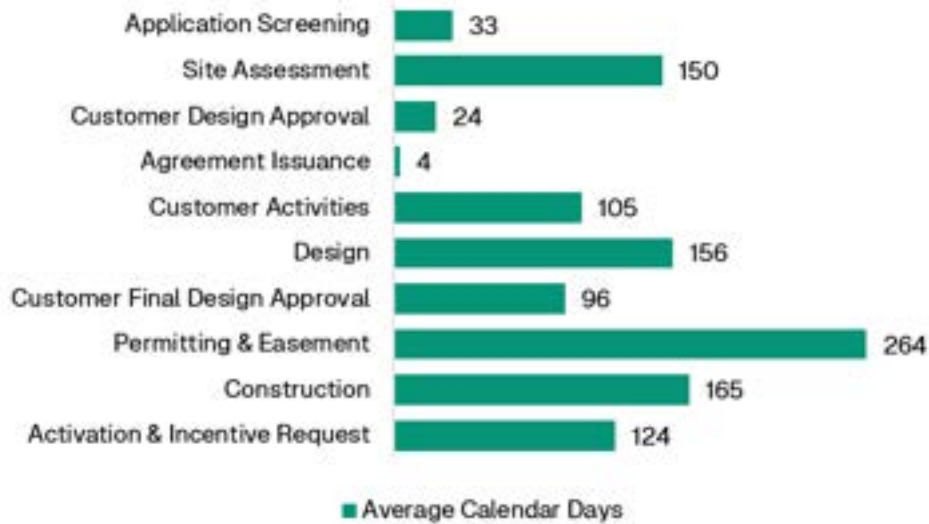
³⁵ Puget Sound Energy, Transportation Electrification Summary Report. December 2025. <https://apiproxy.utc.wa.gov/cases/GetDocument?docID=107&year=2021&docketNumber=210191>.

³⁶ Standard Review Projects and AB 1082/1083 Pilots Evaluation Year 2024 (Year 4). September 2025. <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/sb-350-te/srp-ab10821083-2024-evaluation-report092025.pdf>

³⁷ PSEG Long Island, Utility 2.0 Long Range Plan & Energy Efficiency Plan: 2024 Annual Update Version 2. August 2024. <https://www.psegliny.com/aboutpseglongisland/legalandregulatory>.

³⁸ National Grid, MA EV Phase II Program Year 5 and Phase III Program Year 2 Annual Report. May 2025. <https://eeaonline.eea.state.ma.us/dpu/fileroom/#/dockets/docket/12566>.

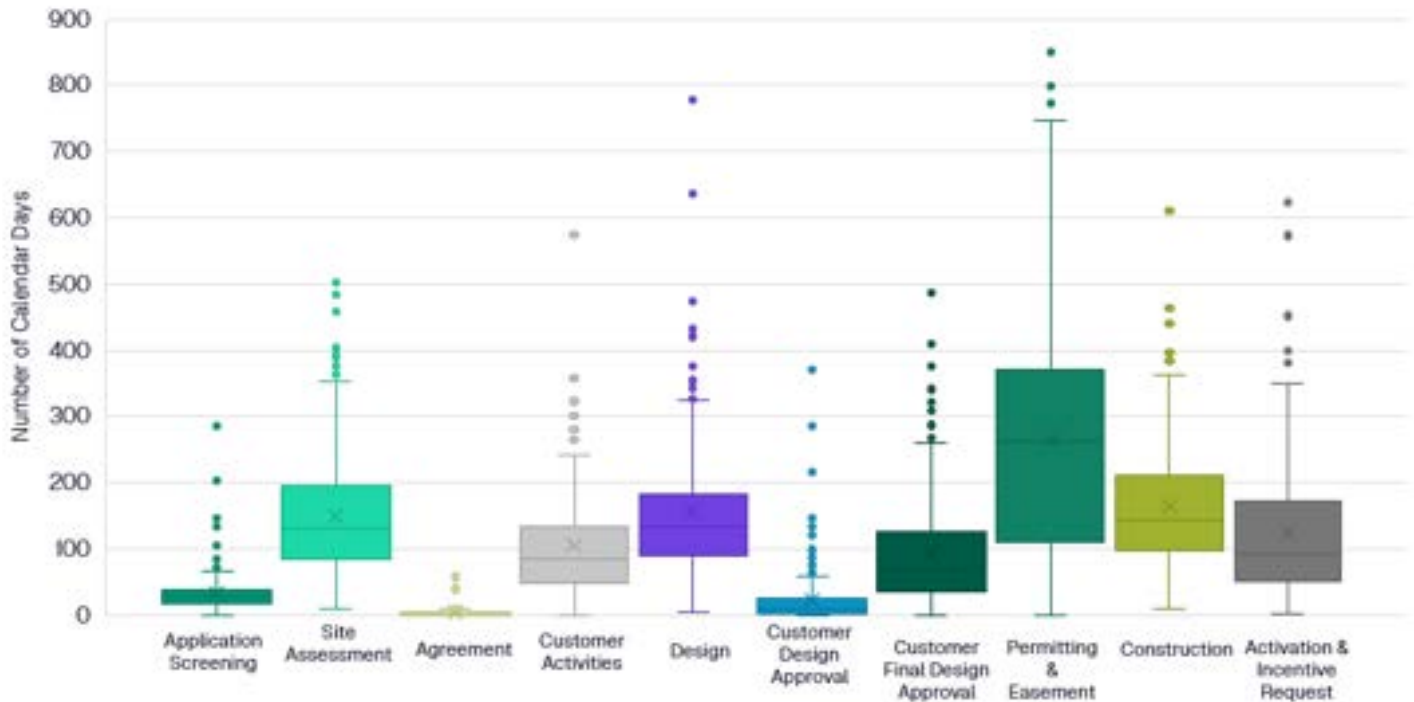
Figure 6. Average Calendar Days for CIR (n=232)



Note: The Activation & Incentive Request phase is only representative of 180 applications.

Figure 7 expands the analysis of program phase duration by displaying the average number of calendar days per phase (denoted by X), calendar day median (middle line inside the box), first quartile (bottom of box), third quartile (top of box), the minimum non-outlier (bottom tail), maximum non-outlier (top tail) and outliers (dots) for each phase. SCE staff explained that the permitting & easement phase can often be a sticking point for project progress and experience great variability. Some districts are particularly challenging to get permits from due to city requirements, and others can be much quicker. This may lead to some projects having extensive lead times and outliers for those projects. Additionally, changing requirements pose permitting & easement delays for certain jurisdictions and can extend lead times.

Figure 7. Variation of CIR Calendar Days (n=232)



Note: The Activation & Incentive Request phase is only representative of 180 applications.

4.3.2 CSMR Timelines

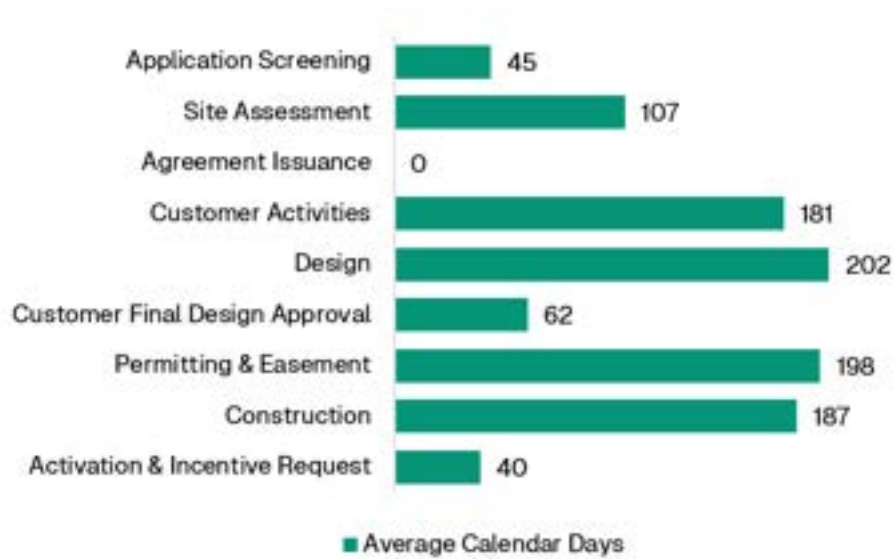
For CSMR projects, the average total time from application submission to incentive payment is 1,000 days, or approximately 2.7 years, which is slightly shorter than CIR. The CSMR Program often experiences additional customer-driven delays compared to CIR because the customers play a greater role in design and construction. During early project phases, such as site assessment, timelines may extend when customers must approve a T&D Narrative via email. Customers may take additional time to respond or request revisions before moving forward. Among all project phases, design represents the longest duration for CSMR projects, taking an average of 202 days. Design timelines for CSMR projects may be further extended due to some early CSMR projects located in dense, high complexity municipalities. These jurisdictions present additional design challenges related to congested underground infrastructure, limited right-of-way availability, aging electrical systems, and increased coordination requirements with local authorities.

The permitting & easement phase closely follows, taking an average of 198 calendar days. CSMR may experience permitting & easement delays as customers are required to obtain their own permits for their portion of the customer-side work and SCE does not control the customer's success or timeframe in which they receive their permits. The construction phase may be delayed for the same reasons.

The customer activity phase also contributed to extended timelines. For CSMR, this phase averaged 181 days compared to only 105 from CIR. As shown in Figure 9 the customer activities phase may experience great variability across projects. Within this phase, site plan submission experiences delays as customers prepare the necessary AutoCAD files for beyond-the-meter work.

Customers may need to make several revisions to ensure the site plan is correctly submitted. To mitigate delays, the program team has been actively collaborating with these customers, holding meetings to review requirements, and clarify expectations.

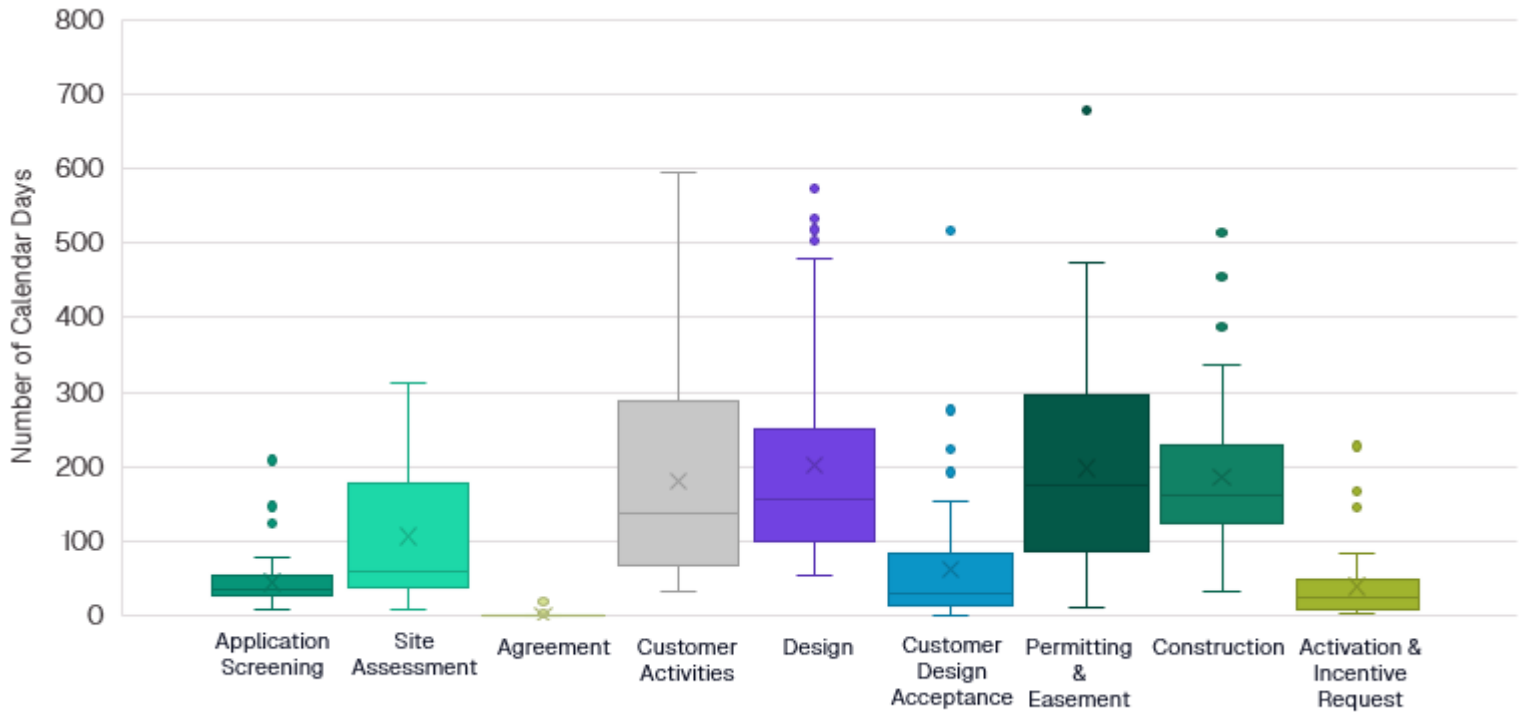
Figure 8. Average Calendar Days for CSMR (n=76)



Note: The Activation & Incentive Request phase is only representative of 71 applications.

Figure 9 expands the analysis of program phase duration by displaying the average number of calendar days per phase (denoted by X), calendar day median (middle line inside the box), first quartile (bottom of box), third quartile (top of box), the minimum non-outlier (bottom tail), maximum non-outlier (top tail) and outliers (dots) for each phase.

Figure 9. Variation of CSMR Calendar Days (n=76)

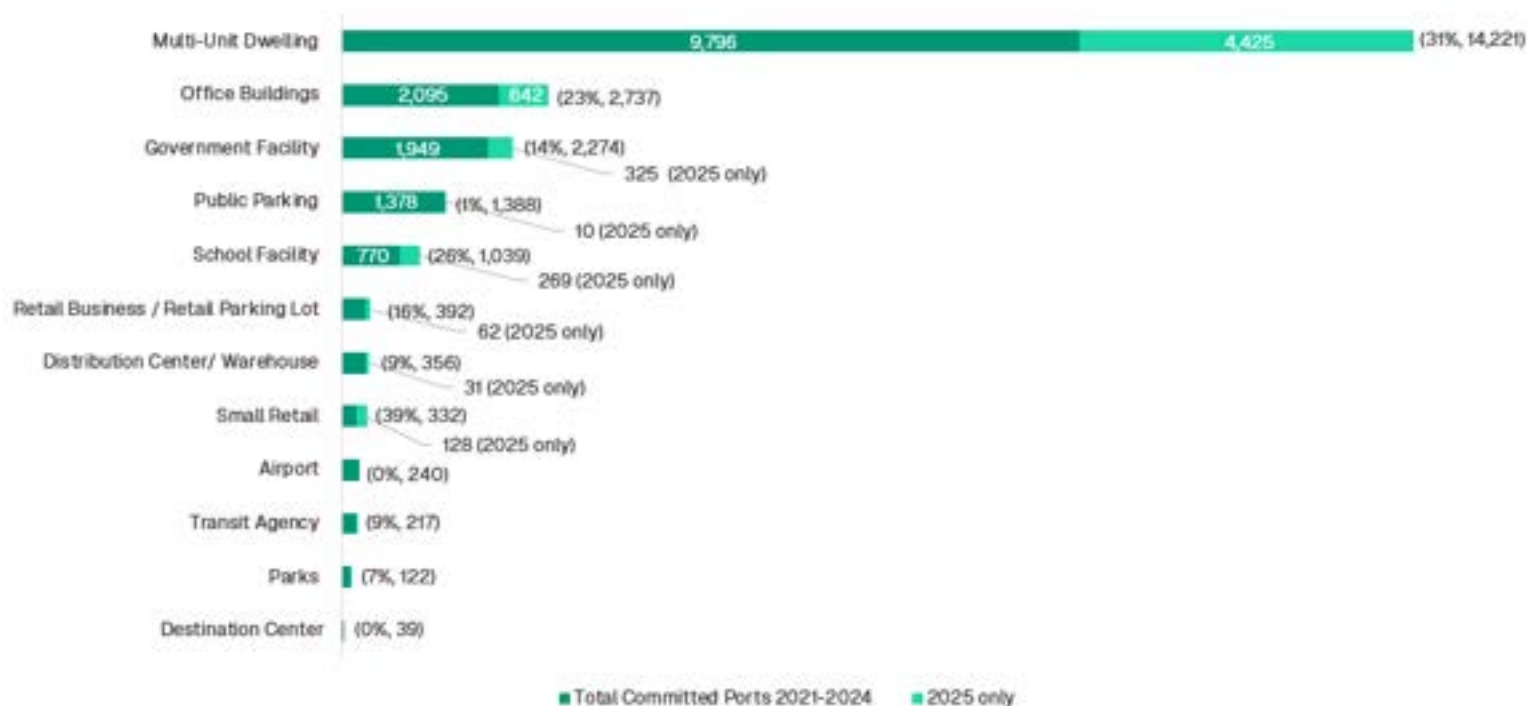


Note: The Activation & Incentive Request phase is only representative of 71 applications.

4.4 Participant Market Segmentation

Figure 10 shows the breakdown of all ports committed through the CRLD Program by market segment. A total of 5,920 ports were committed in 2025, 25% of total program committed ports. The top four segments that committed ports in 2025 include MUDs (4,425), office buildings (642), and government facilities with 325 sites.

Figure 10. Industry Breakdown of Committed Ports by Market Segment in 2025



Note: Historic applications get updated over time and visualizations are a snapshot in time and may change year to year.

4.5 Load Management and Grid Integration

This section examines site load shapes, peak-period demand, and charging patterns associated with CRLD-supported sites.

4.5.1 Data Sources

We assessed when charging occurs and how usage varies across site types using AMI and session data. The following sections presents metrics and findings based on AMI and charging session data. According to program tracking data, 425 charging sites were completed by the end of 2025 (Table 14). We treat receipt of AMI data for a site as an indicator that the site has been energized. We received AMI data for 313 of the 425 sites, indicating that 91% of completed sites are energized and in use. Energization rates vary by site type. Most or all government, public parking, school, retail, airport, and park sites have been energized. SCE supported more MUD sites than any other site type, but only 41% are energized.

Table 14. Number of Completed Sites and Sites with AMI and Session Data by Market Sector

Market Sector	Completed Sites	AMI Data (Energized)		Session Data	
	n	n	% of Completed	n	% of Energized
Multi-Unit Dwelling	124	103	83%	64	62%
Office Buildings	66	64	97%	28	44%
Government Facility	43	40	93%	5	13%
Public Parking	42	40	95%	14	35%
School Facility	18	18	100%	4	22%

Distribution Center/ Warehouse	14	13	93%	2	15%
Retail Business Center/ Retail Parking Lot	15	15	100%	6	40%
Airport	9	9	100%	4	44%
Parks	7	7	100%	0	0%
Small Retail	3	3	100%	1	33%
Destination Center	1	1	100%	1	100%
Transit Agency	1	0	0%	0	0%
Total	343	313	91%	129	41%

Note: Completed site counts do not include SSR sites, which are not energized, and NCR sites, for which data collection has not started yet.

Table 15 below shows the percentage of total consumption from the AMI data that the session data covered within sites with both AMI and session data in 2025. Overall, the session data covered 81% of the AMI consumption in sites with both AMI and session data. The lower session data coverage can be for two reasons – due to missing session data, and due to the AMI data including consumption of additional end-uses. Within sites for which we received session data, often months of session data are missing. Moreover, SCE staff indicated that the AMI data corresponds solely to charging equipment consumption during previous conversations, though there is uncertainty with a very small number of sites.³⁹ As such, we conclude that most of the difference is due to missing session data. We also note that coverage varies by market sector, ranging from 48% (Distribution Center/ Warehouse) to 97% (Government Facilities.)

Overall, the gaps in session data reflect recurring challenges in obtaining complete, consistent, and accurate data for individual charging sessions. This is the first year we are reporting results using session data. However, the data are still not comprehensive: we received usable session data for 129 sites, or 41% of energized sites. Coverage also varies by site type, ranging from 62% of MUD sites to 13% of government sites. As a result, conclusions based on session data may not represent all sites.

³⁹ For one out of 313 sites, SCE cannot confirm if the AMI data contains additional end-uses.

Table 15. Percent of AMI Consumption Covered by Session Data by Market Sector (2025)

Market Sector	Total Consumption in AMI (kWh)	Total Consumption in Session Data (kWh)	Percent Coverage
Office Buildings	1,261,150	1,169,865	93%
Public Parking	613,603	524,098	85%
Multi-unit Dwelling	529,490	360,560	68%
Distribution Center/ Warehouse	443,452	213,540	48%
School Facility	295,148	253,626	86%
Retail Business Center/ Retail Parking Lot	153,579	132,582	86%
Airport	99,571	66,167	66%
Government Facility	88,011	85,450	97%
Small Retail	12,740	10,918	86%
Destination Center	7,398	4,548	61%
Total	3,504,142	2,821,354	81%

Note: The totals are derived from 108 sites that have both AMI and session data. Due to the differences in availability of data in previous years, only 2025 data was used.

4.5.2 Energy Consumption Over Time

Aggregated energy consumption generally increased from October 2022 through December 2025 as the number of energized applications also increased. Figure 11 shows total energy consumption, maximum daily demand, and the number of unique energized applications over time. The changes are as expected: the number of applications increased over time and total consumption rose as more chargers became operational.

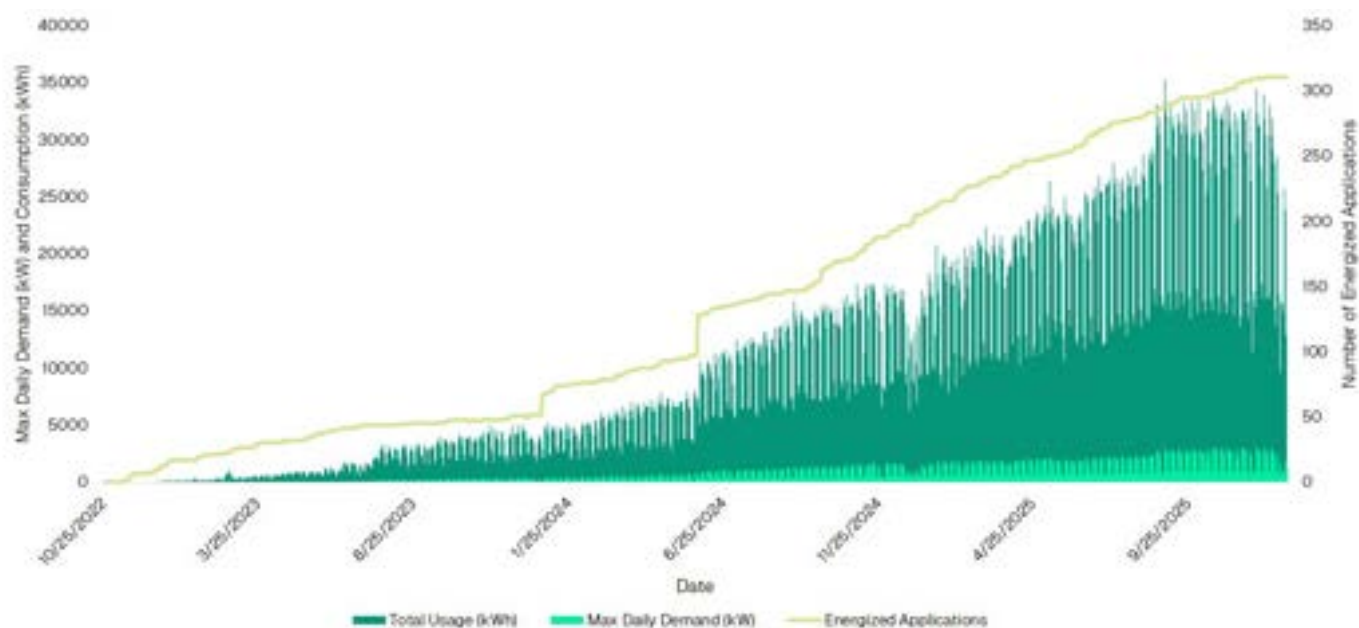
The maximum value in 2025 was slightly more than double the maximum of 2024. The highest recorded daily consumption was:

- 5,111 kWh in 2023 (recorded on December 11),
- 17,460 kWh in 2024 (recorded on November 14), and
- 35,390 kWh in 2025 (recorded on September 2).

The minimum value in 2025 was more than triple the minimum value of 2024. The lowest recorded daily consumption was:

- 91 kWh in 2023 (recorded on January 27),
- 1,989 kWh in 2024 (recorded on January 27), and
- 7,069 kWh in 2025 (recorded on January 1).

Figure 11. Total Energized Applications and Usage Over Time



In addition to the increased number of energized applications, there was a rise in average charging station usage that may also contribute to the rising overall consumption. For instance, in 2025, there is a relatively steady increase in the number of energized applications paired with a steady increase in total usage. Starting in September 2025, however, there is a jump in total usage despite the number of energized applications keeping the same rate of growth. Data shown in Table 16 makes evident an increase in charging station usage over time, showing that the average daily energy consumption per energized application increased from 68 kWh in 2024 to 79 kWh in 2025. This represents a 17% increase from 2024 to 2025. Further, this increase represents a consistent growing trend in usage, as the number of energized applications grew 157% (121 in 2024 to 311 in 2025), yet the overall average daily consumption per application remained above previous years.

Table 16. Average Daily Consumption per Energized Application by Year

Year	Average Consumption per day per energized application (kWh) ⁴⁰
2023	41
2024	68
2025	79

Of the energized applications contributing to overall consumption, slightly under half were in DACs. Compared to the number of applications, DACs applications constitute a slightly lower percentage of total usage, comprising 42% of all applications and 39% of total usage (Table 17). Non-DACs applications represent 58% of total applications but contribute 61% of total usage. This suggests that, on average, non-DACs sites have slightly higher usage per energized application than DACs sites. The following sections explore these differences in charging patterns in more detail.

Table 17. Average kWh and Percentage Total Usage in 2025: DACs vs. Non-DACs

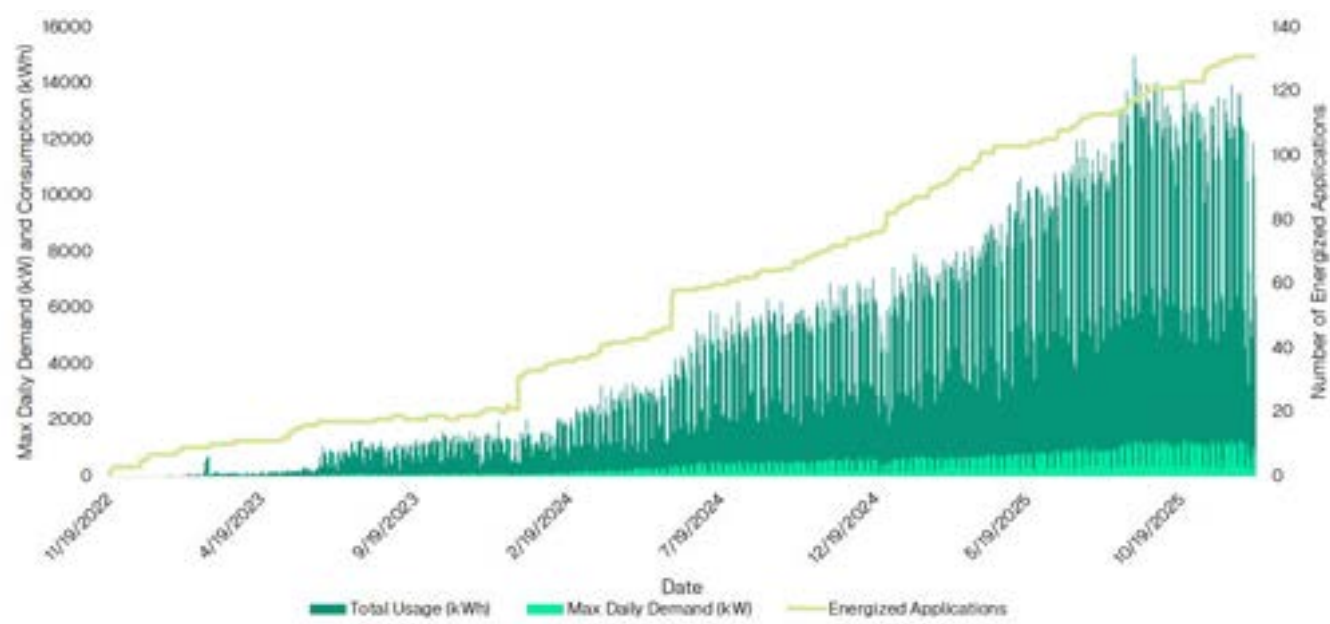
Group	Unique Energized Applications (311)	% Total Usage (11,643,015 kWh)
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⁴⁰ Average consumption for 2021 and 2022 is not reported due to insufficient data.

DACs	42%	39%
Non-DACs	58%	61%

The consumption trends observed in energized DAC applications mirror those in all energized applications. Figure 12 shows total energy consumption, maximum daily demand, and the number of unique energized applications in DACs over time. Like the overall trend for energized applications, there is a consistent increase in energy consumption over time. The highest daily consumption in 2025 occurred on September 2, totaling 15,022 kWh, whereas the lowest was recorded on January 1, at just 1,879 kWh. As the number of operational chargers increased, the impact of site-specific fluctuations on total consumption diminished.

Figure 12. Total Energized Applications and Usage Over Time (DAC)



As seen in the overall trend, this rise in consumption follows an increase in energized applications; however, the increased use of charging stations may also contribute to this upward trend. Stations in DACs also saw a jump in usage from September to October 2025 that is greater than would be expected from just the growth in energized applications. Additionally, as illustrated in all energized applications, the average daily consumption per energized DAC application increased from 2024 to 2025, increasing from 60 kWh to 76 kWh (Table 18).

Table 18. Average Daily Consumption per Energized DAC Application by Year

Year	Average Consumption per day per energized DAC application (kWh)
2023	34
2024	60
2025	76

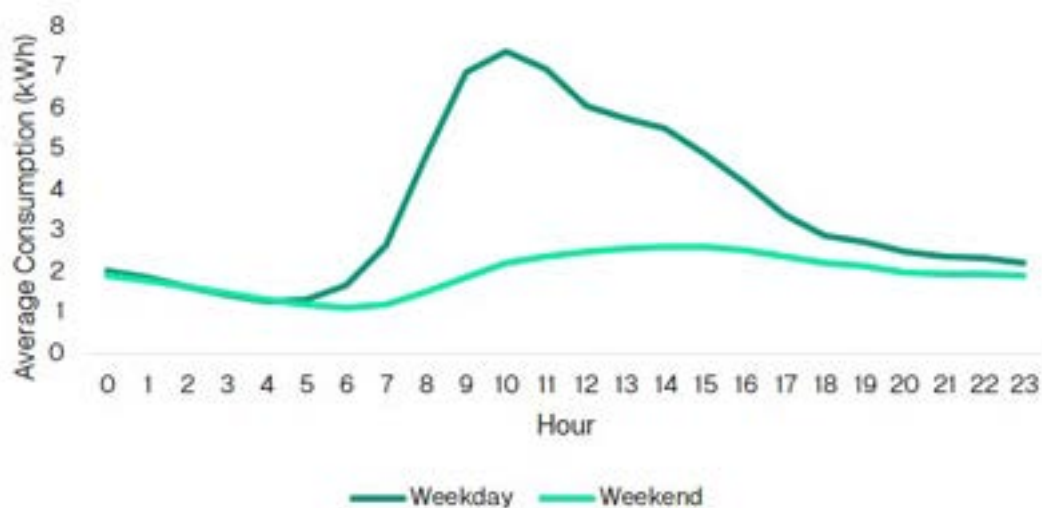
4.5.3 Variation in Aggregate Charging Patterns

Across all energized applications combined, most charging load occurs during the middle of the day. The program-to-date average charging load for energized applications by day type and community type is plotted in Figure 13. The average weekday load is highest in the mid-morning hours, peaking around 10:00 a.m. and gradually decreasing throughout the day. Overnight charging loads are relatively low. In contrast, weekend charging loads are lower than those on weekdays, with a gradual peak around 2:00 p.m. While the weekend charging load is consistently less than on weekdays, the loads are more similar during overnight and early morning hours.

Energized applications in DACs show the same general patterns.

Figure 13. Program-to-Date Average Hourly Demand of Energized Applications by DAC Designation and Day Type

Overall (n = 313)



DAC (n = 132)

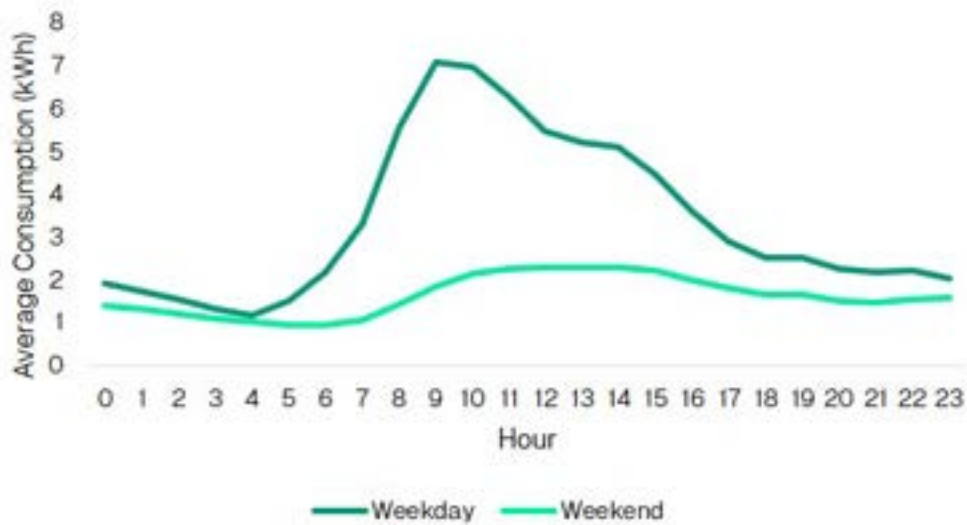


Table 19 provides a detailed breakdown of the percentage of energized applications and their usage by market sector, categorized by DAC and non-DAC. We observed the following key takeaways across market sectors and community types:

- In both DACs and non-DACs, office buildings represent a larger share of total energy usage compared to their proportion of energized applications. Among the 132 energized applications in DACs, office buildings account for 28% of the applications and 45% of the total energy consumption. In non-DACs, office buildings make up only 15% of the 180 energized applications, yet they contribute to 39% of the energy usage.
- MUDs are the most frequent non-DAC application (44%) but account for a lower share of total usage (16%). MUDs comprise 17% of applications in DACs and just 5% of total usage.
- Retail center applications account for a proportional share of total usage relative to their share of applications in both DACs and non-DACs. Retail centers comprise 5% of energized applications and 5% of total usage in DACs, and 4% of energized applications and 2% of total usage in non-DACs.
- Public parking applications account for a proportional share of total usage relative to their share of applications in DACs (13% of energized applications and 13% of total usage), but they account for a higher percentage of total usage compared to their share of energized applications in non-DACs (13% of energized applications and 22% of total usage).
- Distribution center and warehouse applications account for a higher percentage of total usage compared to their share of energized applications in DACs (8% of energized applications and 20% of total usage) and a somewhat higher share of total usage relative to their share of applications in non-DACs (2% of energized applications and 6% of total usage).
- Applications that are in all other market sectors account for a lower percentage of total usage compared to their share of energized applications in DACs (29% of energized applications and 12% of total usage) and a proportional share of total usage relative to their share of applications in non-DACs (22% of energized applications and 15% of total usage).

Table 19. DAC and Non-DAC Percent Energized Applications and Total Usage by Market Sector

DAC

Non-DAC

Market Sector	Percentage of Energized Applications (n=132)	Percentage of Total Usage (4,536,730 kWh)	Percentage of Energized Applications (n=181)	Percentage of Total Usage (7,115,611 kWh)
Office Buildings	28%	45%	15%	39%
Public Parking	13%	13%	13%	22%
MUD	17%	5%	44%	16%
Retail Business Center / Retail Parking Lot	5%	5%	4%	2%
Distribution Center / Warehouse	8%	20%	2%	6%
All Other*	29%	12%	22%	15%

Note: Due to low counts, the following market sectors have been classified as other: Government Facilities, Airports, Destination Centers, Parks, Small Retail, and School Facilities.

Figure 14 displays the 24-hour load shapes categorized by the market sector. Charging predominantly occurs during the daytime across most sectors, peaking in the mid-morning hours. The notable exception is MUDs, which experience more overnight load. Office buildings, public parking, distribution centers/warehouses, retail centers, and all other segments have peaks that occur around 10:00 a.m. and gradually reduce throughout the remainder of the day. Distribution centers/warehouses and office buildings have more sharp declines after their peaks; despite having much higher peaks than the other market segments, their average consumption reduces to a similar level of average consumption to the other market segments by around 6 p.m. The average load shapes per market sector are relatively consistent in 2025 compared to overall program-to-date trends.

Figure 14. Program-to-Date Average Hourly Demand by Market Sector

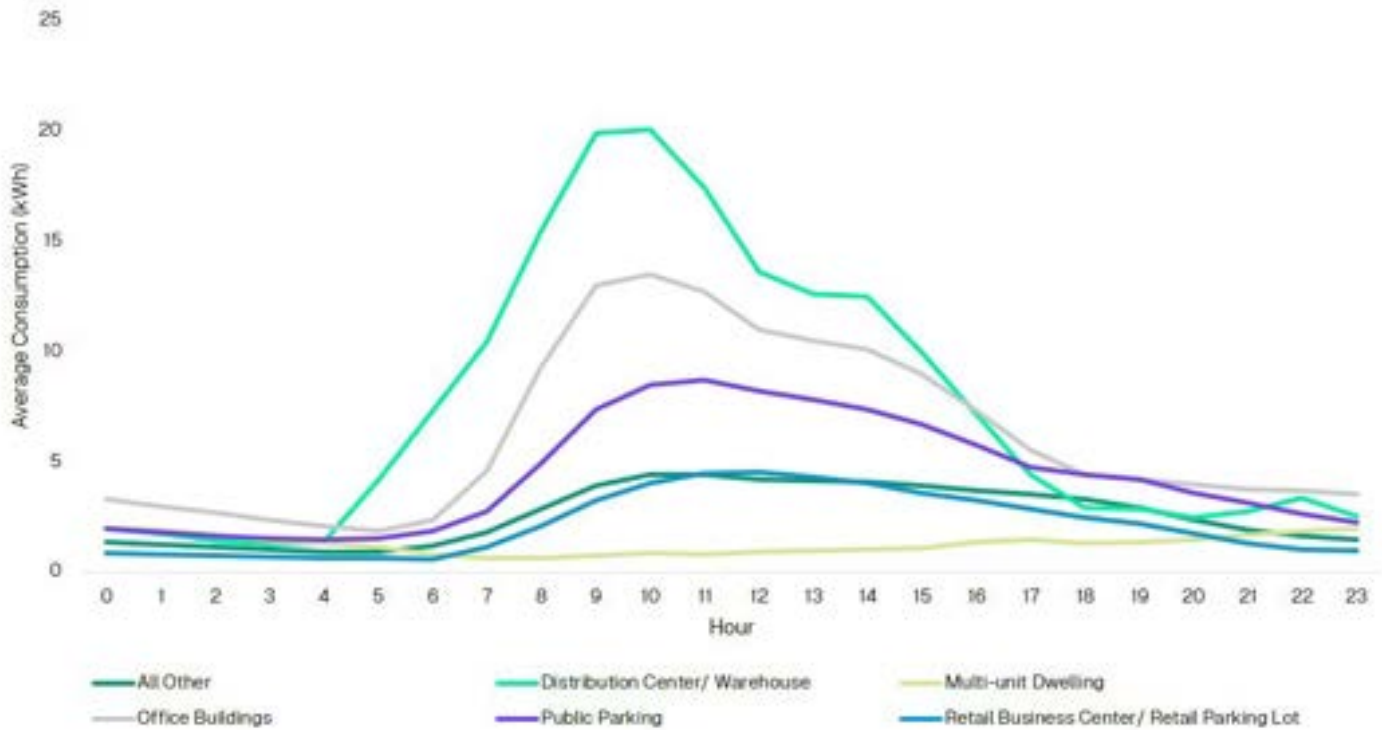
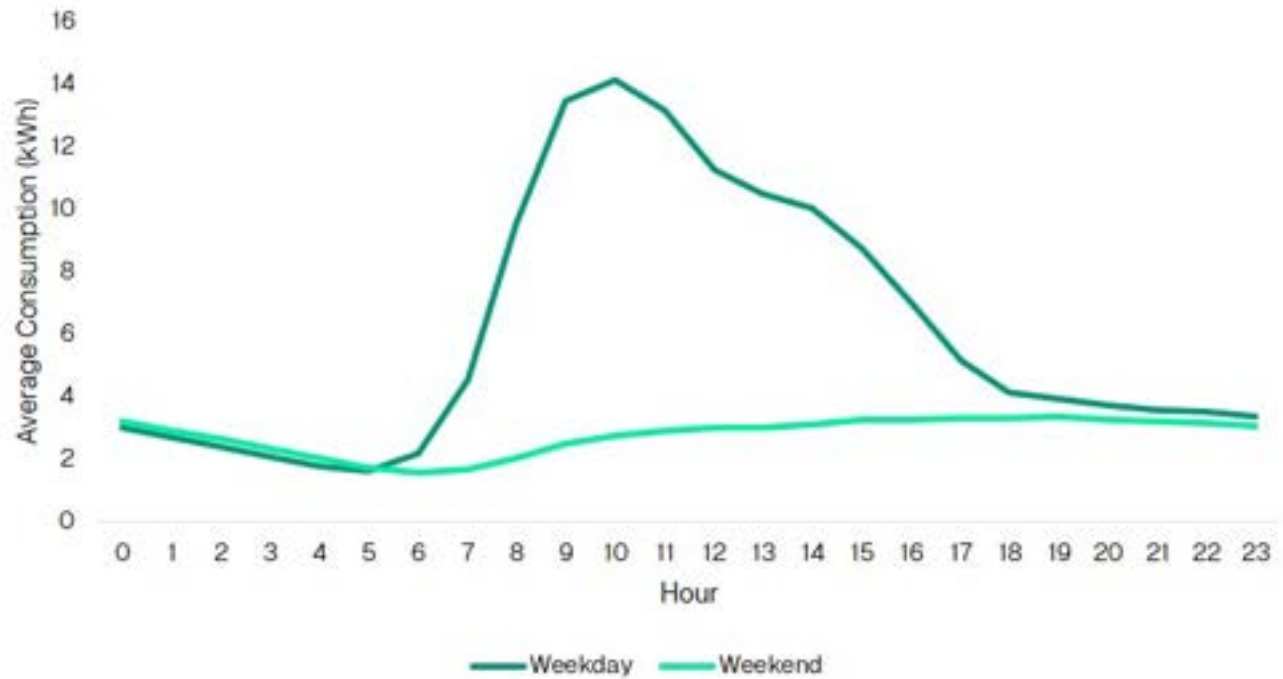


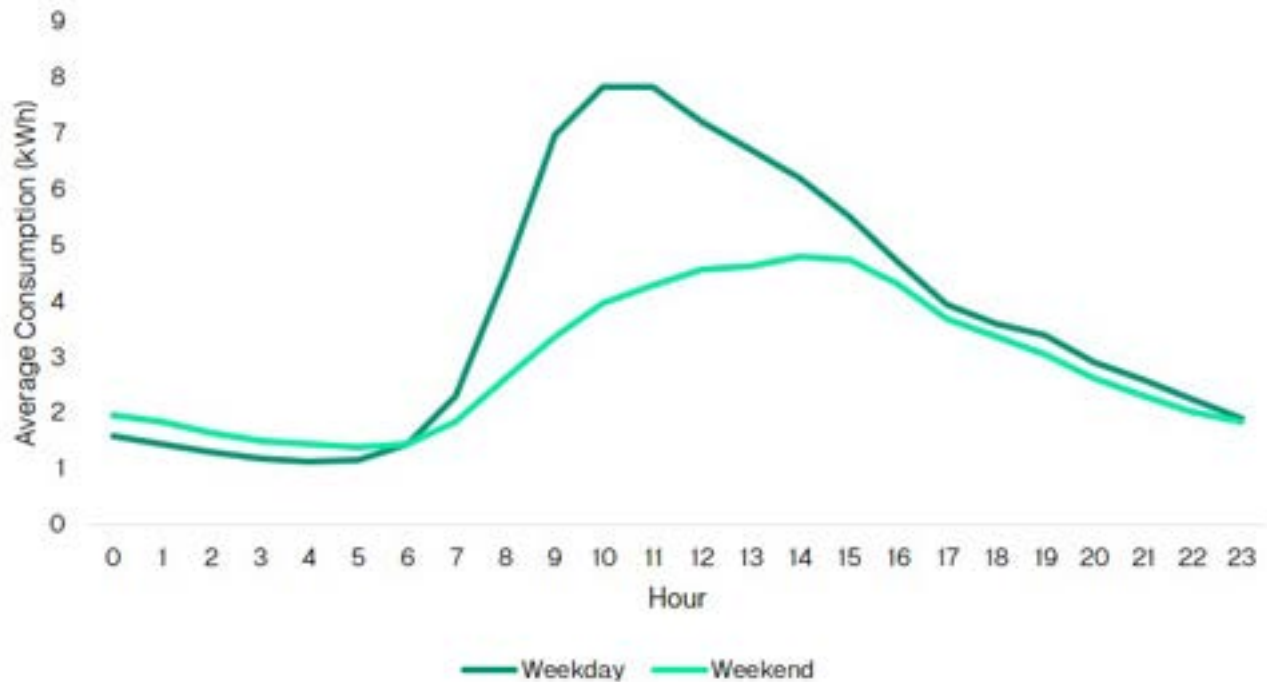
Figure 15 compares charging patterns on weekdays versus weekends across the different market sectors. As expected, office buildings exhibit notably different average load shapes on weekdays compared to weekends. On weekdays, office building loads increase in the morning as employees arrive for work, reaching a peak in mid-morning before decreasing in the afternoon. In contrast, weekend loads are generally lower and more evenly distributed throughout the day. Distribution center/warehouses exhibit a similar trend, with usage having clear daytime peak on weekdays and relatively consistent low usage on weekends. Public parking, retail centers, and all other sectors mainly experience charging during the daytime on weekdays and weekends. In these sectors, slightly higher consumption and an earlier peak are observed on weekdays compared to weekends. Finally, MUDs have much more similar charging patterns between weekdays and weekends, with peaks occurring overnight in both cases.

Figure 15. Program-to-Date Weekday vs. Weekend AMI Load Shapes by Market Sector

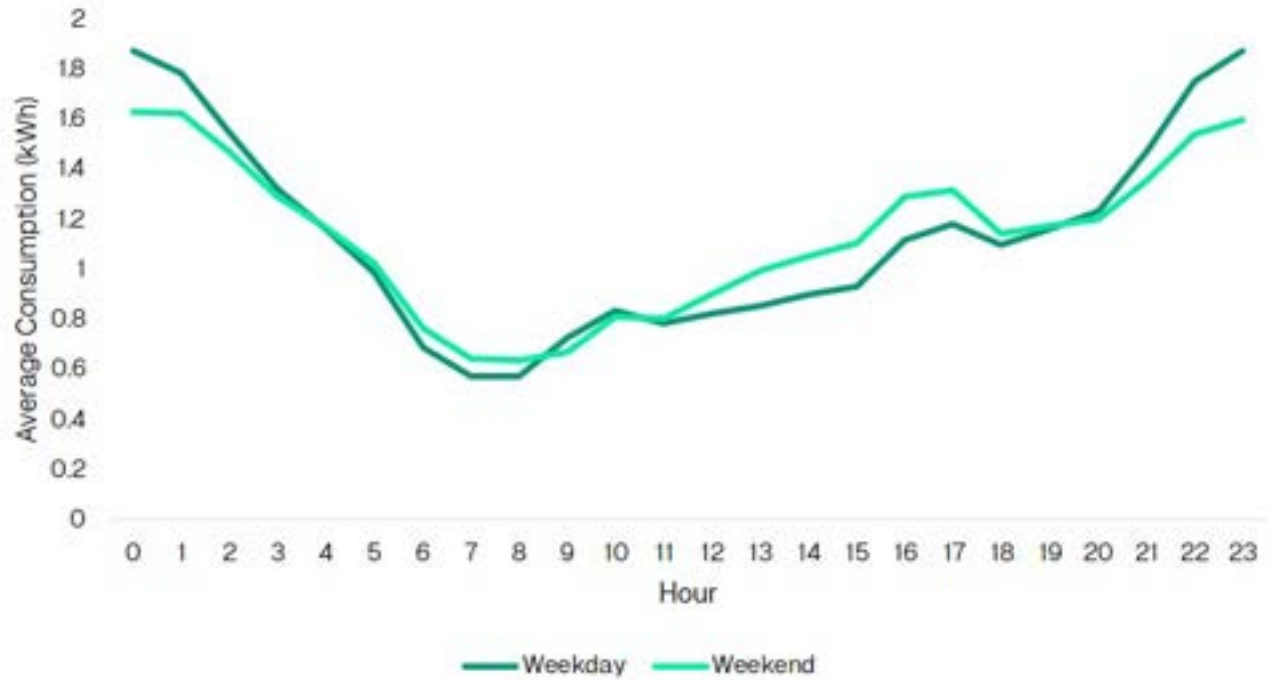
Office Buildings



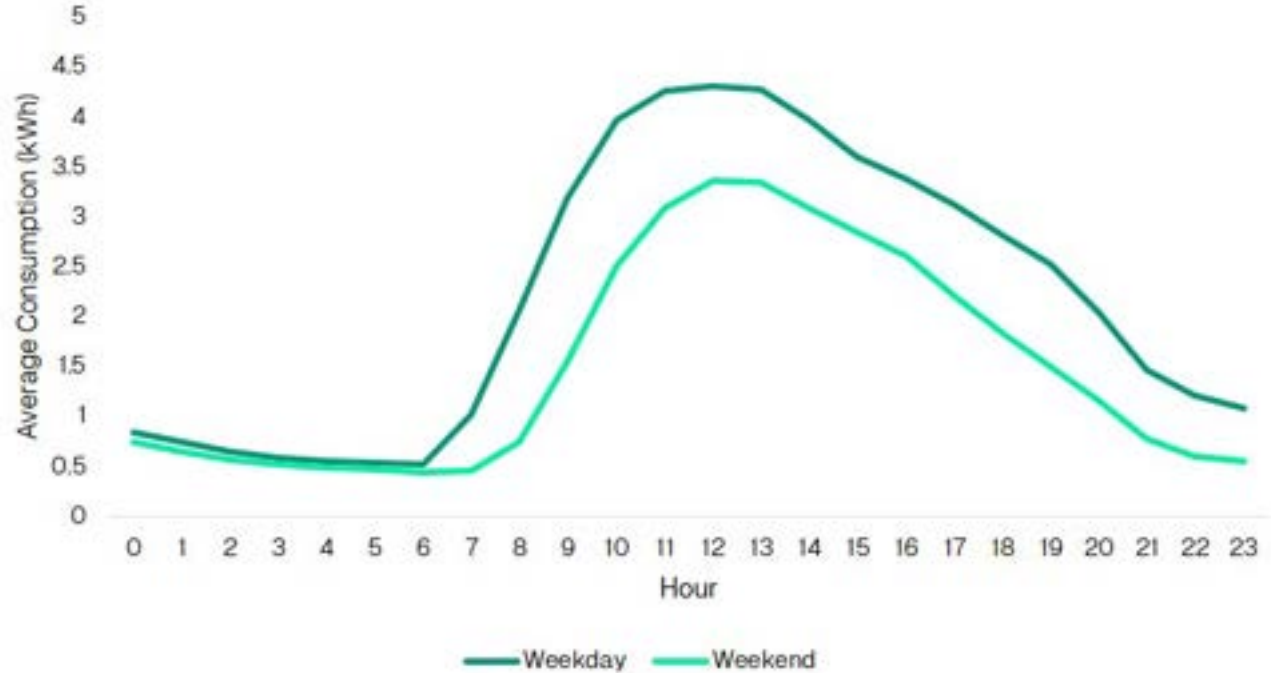
Public Parking



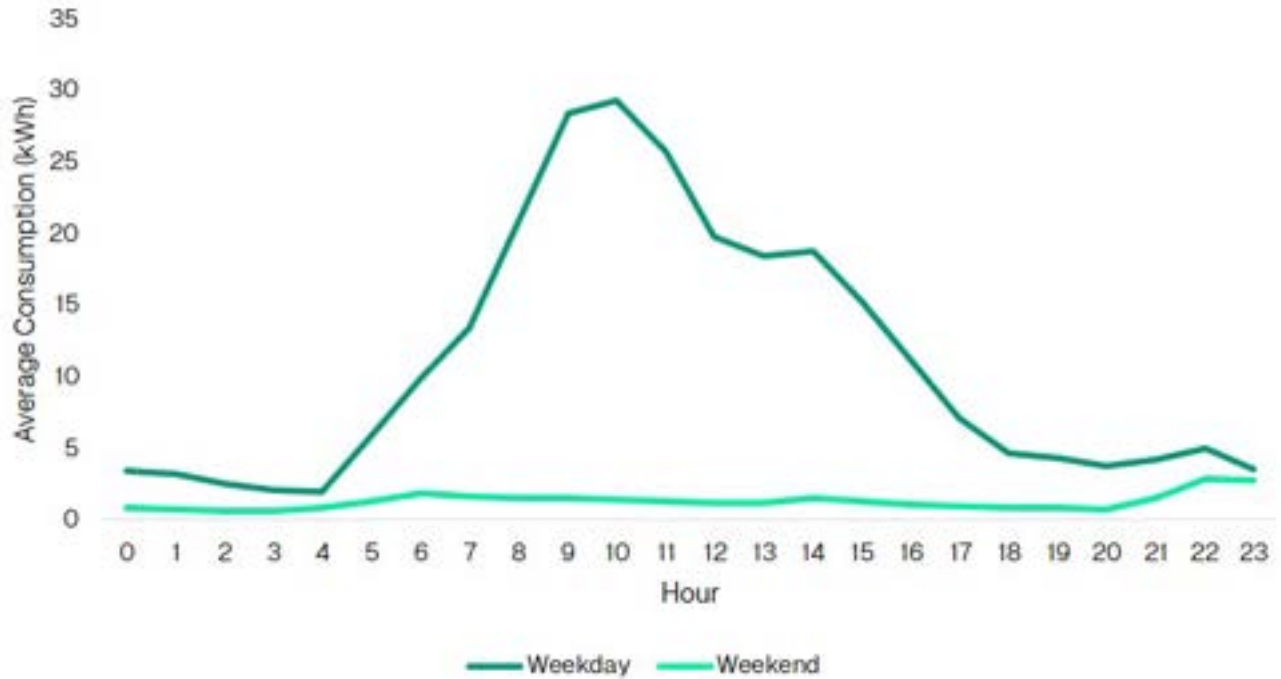
MUD



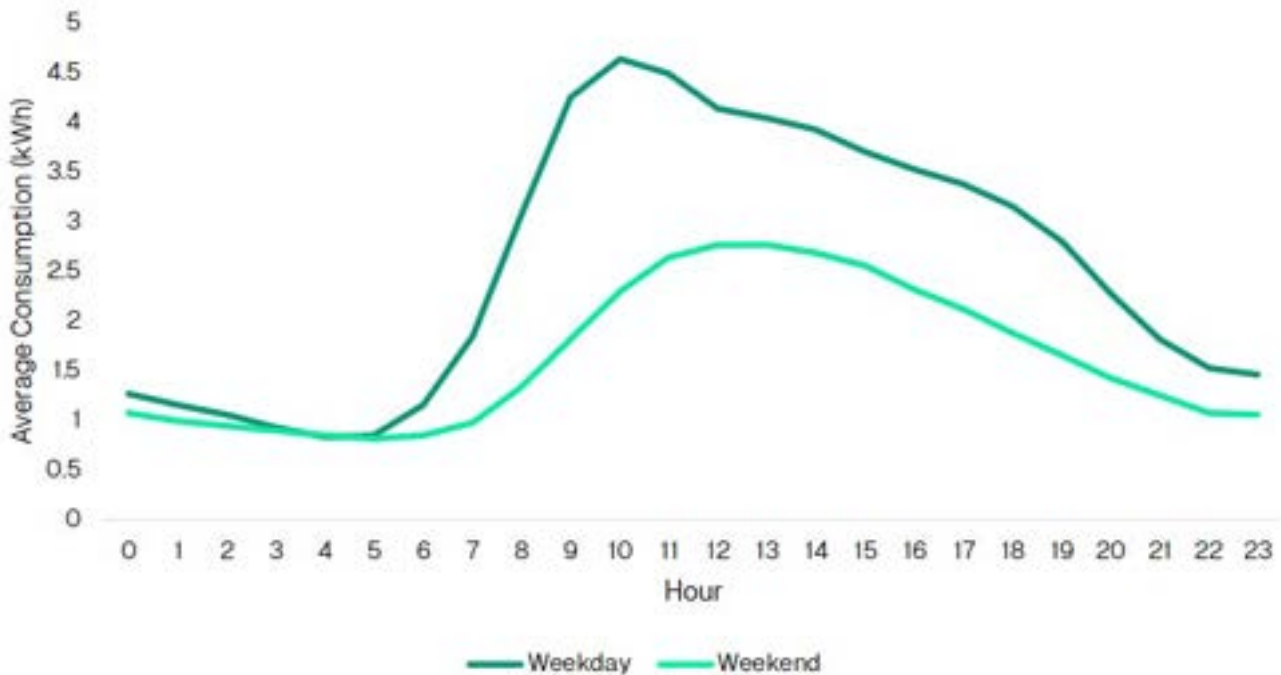
Retail Business Center / Retail Parking Lot



Distribution Center / Warehouse



All Other



4.5.4 Peak Periods

Table 20 illustrates program-to-date total and on-peak charging consumption for each market sector.

Charging is broken down by on-peak (weekdays, 4:00 p.m.–9:00 p.m.) and off-peak (weekdays, 9:00 p.m.–4:00 a.m. and weekends). Across all market sectors, 16% of total charging was conducted during on-peak hours.

Retail center energized applications recorded the highest share of on-peak charging (21%) of any market sector. “All Other” recorded the second-highest percentage of on-peak usage (20%). Office buildings, public parking, and MUD sectors recorded 14%, 16% and 15% of charging on-peak, respectively. Distribution centers/warehouses had the smallest percent of on-peak usage at 11%. The percentage of charging that occurs on-peak is seen to be relatively consistent across years.

Table 20. Program-to-Date Total and On-Peak Usage Across Market Sectors

Market Sector	Unique Applications	Total Usage (kWh)	Total On-Peak Usage (kWh)	% On-Peak Usage
Office Buildings	64	4,809,900	669,691	14%
Public Parking	40	2,177,919	344,127	16%
MUD	103	2,177,919	203,841	15%
Distribution Centers/Warehouse	13	1,342,003	150,568	11%
Retail Business Center / Retail Parking Lot	15	386,602	79,881	21%
All Other	78	1,595,472	313,682	20%
Overall	313	12,489,814	1,761,790	16%

4.5.5 Maximum Demand

Table 21 presents program-to-date maximum demand by DAC status and Table 22 shows program-to-date maximum demand by market sector. Including all 311 energized applications, a maximum demand of 3,124 kW occurred on December 1, 2025, at 10:00 a.m. Both energized DAC and non-DAC applications also have a maximum demand that occurs at 10:00 a.m., though the non-DAC maximum demand is 40% higher than the DAC maximum demand.

Office buildings, public parking, distribution centers, and all other recorded maximum demand at 10:00 a.m., while MUDs and retail centers recorded maximum demand in the overnight hours. As expected, the maximum demand across all sectors occurred in 2025, as the value is cumulative and thus increasing as more applications are energized.

Table 21. Program-to-Date Maximum Demand by DAC Status

DAC Status	Unique Applications	Max Demand (kW)	Date of Max Demand	Hour of Max Demand
DAC	131	1,361.60	December 8, 2025	10
Non-DAC	180	1,905.02	December 1, 2025	10
Overall	311	3,213.75	December 1, 2025	10

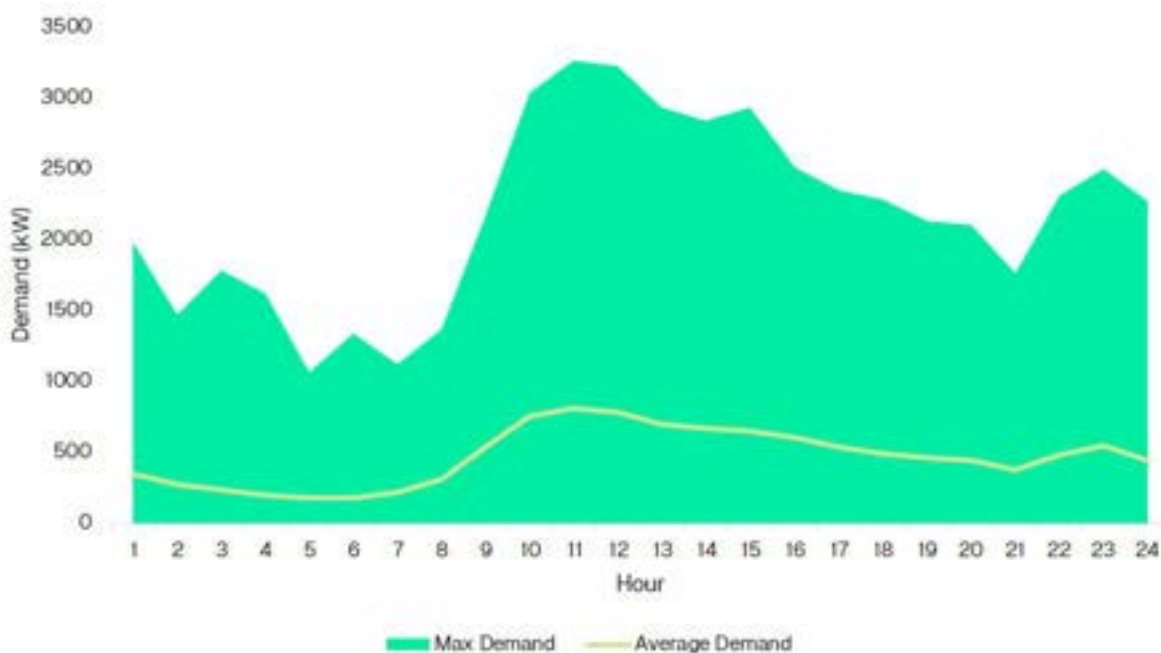
Table 22. Program-to-Date Maximum Demand by Market Sector

Market Sector	Unique Applications	Max Demand (kW)	Date of Max Demand	Hour of Max Demand
Office Buildings	64	1,576.55	September 2, 2025	10
Public Parking	40	642.19	November 19, 2025	10
MUD	103	385.36	December 30, 2025	1

Retail Business Center / Retail Parking Lot	13	198.14	December 30, 2025	12
Distribution Centers/Warehouse	15	527.32	December 8, 2025	10
All Other	78	596.30	October 23, 2025	10
Overall	313	3,213.75	December 1, 2025	10

As seen in Figure 16, the maximum demand per hour is significantly higher than the average, although the load shapes are relatively similar. The peak maximum demand of all sites combined occurred at 10:00 a.m. with a demand of 3,213.75 kW. Despite overnight charging recording relatively low average demand, most hours have recorded a maximum demand higher than 1,000 kW. Figure 16 shows large differences between the maximum and average demand.

Figure 16. Program-to-Date Overall Max Demand and Average Demand



4.5.6 Charging Behavior

In this section, we provide results from our analysis of session-level EV charging data. This analysis leverages detailed session-level data, including charging events, duration, and energy dispensed.⁴¹ The objectives of the analysis were to characterize charging behavior and infrastructure utilization across market sectors and community types (DAC and non-DAC).

Table 23 summarizes average session duration and consumption over time. The average session time increased from 6.2 to 7.3 hours from 2023 to 2025 (a 17% increase). Similarly, the average amount of energy consumed per session increased by 17%, from 18 kWh in 2023 to 21 kWh in 2025.

⁴¹ In this report “charging event” refers to the time period when a vehicle is plugged into an EV charger. The session data does not allow us to determine the amount of time a vehicle is actively charging when being plugged in.

Table 23. Average Charging Event Consumption and Duration by Year

Year	Average Consumption per Charging Event (kWh)	Average Charging Event Duration (Hours)
2023	18	6.2
2024	19	7.1
2025	21	7.3

Note: 2021 and 2022 are excluded due to insufficient data.

Of the 129 sites with available session data, 64% are in non-DAC areas and 36% are in DAC areas (Table 24). Non-DAC sites account for a greater share of total usage relative to the share of sites (79%), suggesting higher utilization, on average, at non-DAC locations.

Table 24 Unique Sites and Percentage Total Usage: DACs vs. Non-DACs

Group	Unique Sites (n = 129)	Percentage of Total Usage
DAC	36%	21%
NON-DAC	64%	79%

As seen in Table 25, despite a smaller share of total usage, DAC sites show higher average session duration than non-DAC sites (8.0 hours vs. 6.9 hours) and higher average session consumption (24 kWh vs. 19 kWh). Overall, DAC sites have fewer but longer sessions than non-DAC sites. Within DAC sites, average daily consumption per session remains relatively stable over time between 24-25. In contrast, average session duration for DAC sites increases steadily from 6.3 hours in 2023 to over 8 hours by 2025. It is possible that charging events increasingly include a greater share of time during which an EVs is plugged in but not charging. Being able to distinguish plug time from charging time in future reports would allow an assessment of this behavior.

Table 25 Average Session Consumption and Duration: DACs vs. Non-DACs

Group	Average Consumption per Charging Event (kWh)	Average Charging Event Duration (Hours)
DAC	24	8.0
Non-DAC	19	6.9

Table 26 Average Charging Event Consumption and Duration by Year: DACs

Year	Average Consumption per Charging Event (kWh)	Average Charging Event Duration (Hours)
2023	25	6.3
2024	24	8.0
2025	24	8.1

We further compared session characteristics across market sectors. Table 27 presents average charging duration and consumption per charging event across different market sectors. Key takeaways include:

- Of the 129 sites with available session data, the majority fall under the multi-unit dwelling (MUD) segment, with 64 sites. These sites exhibit relatively long average session durations (10.2 hours) and moderate energy dispensed per session (22 kWh), consistent with residential or overnight charging patterns.
- Office buildings are the next largest segment with 28 sites and show shorter session durations (5.0 hours) but comparable energy dispensed (20 kWh), which aligns with daytime workplace charging.
- Public parking locations have fewer sites (14) and charging events (55,034), but with moderate session durations (5.3 hours) and energy dispensed (17.4 kWh). Like with office buildings, this aligns with daytime charging.
- Retail businesses account for the smaller share of sites (6) but stand out for having the longest session durations (15.8 hours) and the highest average energy dispensed per session (28.23 kWh), suggesting potentially limited charger turnover. These 6 sites may not represent all 15 retail sites that have been energized.
- The remaining 17 sites have been grouped under a diverse “All Other” category, which includes government facilities, airports, school facilities, distribution centers/warehouses, destination centers, and small retail locations. These varied sites show relatively shorter session durations (4.9 hours) and moderate energy usage (18 kWh).

Table 27. Average Charging Event Duration and Consumption, by Market Sector

Market Sector	Number of Sites	Average Duration of Charging Events (Hours)	Average Consumption per Charging Event (kWh)
Multi-Unit Dwelling	64	10.2	22
Office Buildings	28	5.0	20
Public Parking	14	5.3	17
Retail Business Center/ Retail Parking Lot	6	15.8	28
All Other	17	4.9	18

4.6 Environmental Benefits

The evaluation team estimated GHG emissions, in MT CO₂e, pursuant to the California Air Resources Board’s (CARB) Low Carbon Fuel Standard (LCFS) regulation guidance.⁴² The reported GHG emission reductions in Table 28 are the reductions

⁴² California Code of Regulations Title 17, Section 95480-95490

associated with charging at CRLD Program-supported sites. The total avoided emissions for the 2022–2025 CRLD Program years is 11,781 MT CO₂e. Two-thirds of emissions reductions (68%) are from charging conducted in 2025.

Table 28. Program-to-Date Environmental Benefits

Year	Total Consumption (kWh)	Avoided GHG Emissions (MT CO ₂ e)
2022	3,115	3
2023	650,245	624
2024	3,241,4223	3,198
2025	7,757,559	7,956
Total	11,652,382	11,781

The Evaluation team leveraged Equation 1 to calculate the GHG reductions.

Equation 1. Calculation of Carbon Credits Using the LCFS Fuel Pathways⁴³

$$MT\ CO_2e = \left(CI_{gasoline} - \left(\frac{CI_{electricity}}{EER} \right) \right) \times E_{electricity} \times C$$

The total electricity delivered ($E_{electricity}$) to participating EVSE was 11,643 megawatt hours (MWh) over the 2022 through 2025 calendar years. This equates to 41,914,854 MJ of delivered electricity, using an energy density of 3.6 MJ/kWh.⁴⁴ The C term is a constant for converting gCO_2e to $MT\ CO_2e$ and equals $1 \times 10^{-6} MT\ CO_2e/gCO_2e$.

The Energy Economy Ratio (EER) is a dimensionless adjustment factor that accounts for the difference in the efficiency of a fuel, in this case electricity, used in a vehicle’s powertrain compared to a reference fuel such as gasoline. The LCFS guidelines stipulate using a 3.4 EER value for electricity displacing gasoline as a fuel in a light-duty vehicle.⁴⁵

Fuel’s carbon intensity (CI) represents the lifecycle mass of CO_2e released per unit of fuel energy, measured in grams of CO_2e per megajoule (gCO_2e/MJ). The CI of gasoline is 100.82, as reported in the LCFS Certified Fuel Pathway Table.⁴⁶ Due to the fluctuations in CI expected on the grid across hours, a variable CI of electricity based on CARB’s quarterly hourly LCFS was applied. Figure 17 illustrates the average hourly CI of electricity from 2022 through 2025 and the total consumption recorded per hour. Notably, over half of the total consumption (59%) occurs when the carbon intensity is low, specifically between 8 a.m. and 4 p.m. The low CI during these hours is likely due to the high levels of renewable energy, particularly solar power, available on the grid during these times. Shifting more energy consumption to these hours and away from periods with higher CIs, such as 5 p.m. to 11 p.m., which currently accounts for 23% of the load, can reduce the CI of the electricity used to charge vehicles. This change will further increase the GHGs avoided due to the CRLD Program.

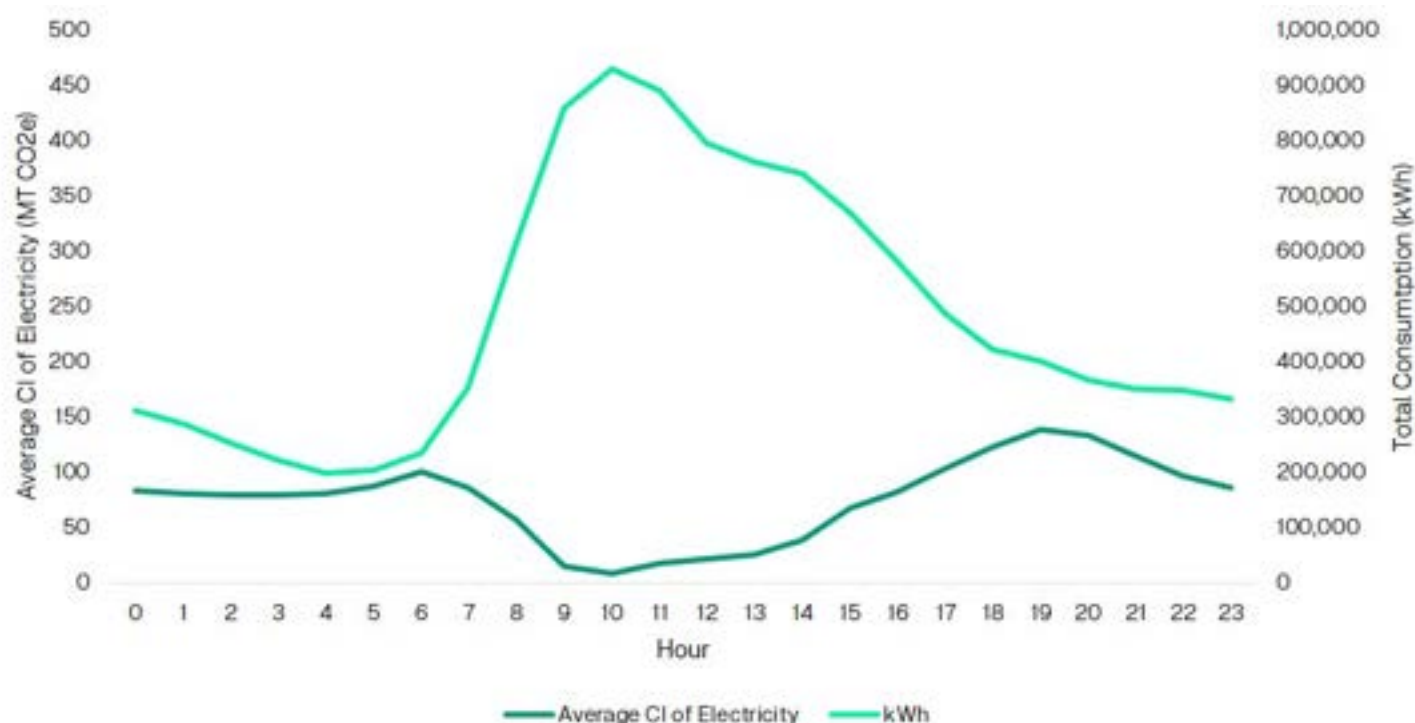
⁴³ California Code of Regulations Title 17, Section 95486.1.(a) General Calculation of Credits and Deficits Using Fuel Pathways.

⁴⁴ California Code of Regulations Title 17, Section 95486.(b) Table 4. Energy Densities and Conversion Factors for LCFS Fuels and Blendstocks.

⁴⁵ California Code of Regulations Title 17, Section 95486.1.(a) Table 5. EER Values for Fuels Used in Light- and Medium-Duty, and Heavy-Duty Applications.

⁴⁶ The evaluation team applied the statewide California Reformulated Gasoline Blendstock for Oxygenate Blending (CARBOB) (Current Certified FPC: CBO000L00072019) carbon intensity “based on the average crude oil supplied to California refineries and average California refinery efficiencies.”

Figure 17. Average CI of Electricity and Total Consumption per Hour



The evaluation team applied quarter-hour variable CI values to evaluate GHG impacts. The average CI of electricity of the CARB LCFS quarter-hourly values, weighted by charging consumption, is presented in Table 29. Across all four years, the weighted average CI of electricity was 73.41 gCO_2e/MJ .

Table 29. CI of Electricity Sustainability Report and CARB Comparison

Year	CARB Quarterly Hourly LCFC Weighted Average CI of Electricity (MT CO2e)
2022	57.97
2023	76.34
2024	67.57
2025	75.62
Weighted Average	73.41

4.7 Cost Metrics

The evaluation team analyzed cost metrics for CRLD per SB 350 and compared CRLD costs with similar programs. We reviewed publicly-available reports for incentive programs similar to CRLD across 17 IOUs in 14 states. The average cost per non-residential L2 port for these programs ranged widely (between \$4,356 and \$50,772), depending on the program design, along with other factors. Average costs per port for the CRLD Programs that had costs beyond rebate-only fall within this range (\$16,658 for CIR and \$11,464 for CSMR). However, considering the relatively small number of public, workplace, or MUD charging programs offered nationally and the differences in scale and design, it is difficult to draw accurate comparisons.

SCE provided the evaluation team with summary cost information associated with each offering in the CRLD program. Reported costs are representative of rate-payer costs and do not reflect program participant-side spend. SCE determines its budget forecast by determining how many sites it expects to install each month and estimating costs by type of program and the number of installation sites. SCE staff noted that forecasted costs aligned with their estimates. Some reasons that costs may vary from original estimates include changes to the originally planned equipment, pivots in design due to permitting contingencies, and unexpected conditions underground once construction has begun.

Table 30 presents program level costs in nominal dollars for 211 financially closed-out sites, where financially closed-out sites are defined as sites that are completed and fully invoiced, all of the work orders have been closed out, and rebates have been paid as of December 31st of 2025. Each program provides different offerings to the customers with different levels of ownership. Rebate only programs such as SSR and NCR have significantly lower costs. The CIR Program and CSMR Program incorporate behind-the-meter and to-the-meter infrastructure costs for all capital, direct, and indirect labor overhead. Therefore, costs are significantly higher compared to the rebate-only programs. A key difference between costs for CIR and CSMR lies in the ownership levels in the program. For CIR, costs include all customer-side costs that the utility covers and owns. For CSMR, rebates are provided by SCE to help cover the customer-side costs, however the utility does not directly cover these costs. Additionally, it is important to note that SCE does not track customer accrued costs. In Table 30, the rebate costs for the Turn-key Program represent maintenance and networking rebates for eligible sites in DAC and MUD. The utility-side and customer-side costs of the Turn-key Program are currently not included and will be reported separately following the completion of additional Turn-key Program sites. DCFC Program was not included because no sites have been installed and therefore financially closed out.

Table 30. Costs from the Beginning of the Program 2021 until December 31, 2025

Cost Type	CIR	Turn-Key ^a	CSMR	SSR	NCR
Utility-side Costs ^b	\$6,594,933	-	\$1,074,292	-	-
Customer-side Costs ^c	\$21,440,614	-	-	-	-
Rebate Costs ^d	\$3,463,920	\$1,157,258	\$4,187,790	\$1,660,402	\$3,243,509
Number of Ports	1,891	-	459	171	929
Total	\$31,499,467		\$5,262,082	\$1,660,402	\$3,243,509

^a Includes Maintenance and Networking Rebates for 175 ports. All other costs for these ports are included in the CSMR and CIR columns.

^b The utility-side site-level costs represent the utility-side (to the meter) infrastructure expenditure for all direct capital costs and indirect labor overhead recorded costs, up to the interconnection point with the panel for completed projects within the reporting period.

^c The customer-side site-level costs represent the customer-side (behind or beyond the meter) infrastructure expenditure for all capital direct and indirect labor overhead recorded costs from the panel, up to but not including the EVSE, for completed projects within the reporting period. For Turn-key Program, customer-side costs include SCE-owned EVSE.

^d Rebates include various categories for EVSE, Maintenance & Networking Rebates for Turn-key sites where the customer owns and operates the EVSE, customer-side make-ready infrastructure, Small Site Rebate, and New Construction Rebate.

Table 31 shows the average cost per port for each sub-program, derived by dividing the total cost per program by the number of ports the program installed.⁴⁷ The evaluation team calculated the average cost per port to better align with how other programs reported costs. As additional sites become financially closed out the average cost per port will become more representative.

⁴⁷ Note Table 31 does not include Turn-key Program as very few sites have been financially closed out to date. Average cost per port information will be provided once more sites are completed.

Table 31. Average Cost per Port (2021 - December 31, 2025)

Sub-Program	Number of Ports	Average Cost Per Port
CIR	1,891	\$16,658
CSMR	459	\$11,464
SSR	171	\$9,710
NCR	929	\$3,491

Our literature review found various incentive program offerings nationally and within California; however, many programs are not comparable to CRLD due to varying structures and cost needs. Our literature review prioritized utilities that had make-ready infrastructure, offered utility ownership, and provided funding beyond a flat-rate rebate. Of the few utilities that incentivized offerings that were most similar to those offered through CRLD, it was found that many of these efforts rarely reported detailed cost information publicly or consistently. It is expected that additional and more relevant program documentation will become increasingly available in future evaluations as they get publicly released.

Some programs reported additional detailed cost information, such as program management, operation and maintenance costs or EVSE costs per program. These costs were less frequently or uniformly reported on. Only those costs that most closely resembled those of CRLD costs were included in the table below. Additional costs such as DCFC costs and operation and maintenance costs will be reported at the end of the evaluation.

As seen in Table 32, eight programs were ultimately chosen for comparison due to similar program structures and offerings for their customers. Ultimately, it was found that costs in the CRLD program, compared with the other utilities, were overall similar, excluding NCR and SSR. When comparing costs, it is best to reference CIR and CSMR as they have accounted for utility-side costs in addition to rebate costs, costing \$16,658 and \$11,464 per port, respectively. These numbers are expected to be higher when accounting for operation and maintenance costs.

Table 32. Alternate Utility Costs by Sub-Program

Utility ⁴⁸	Reporting Period	Selected Sub-Program	Average Cost Per Port	Cost Details
Connecticut Statewide Electric Vehicle Charging Program	January 1, 2022 – June 30, 2025	Commercial	\$9,306	Representative of total incentive per port (64% of total port cost).
Duke Energy Florida	2018-December 31, 2021	MUD	\$5,391	Representative of capital per port for utility-owned turnkey installations. Excludes ongoing maintenance.
		Public	\$6,103	
		WPC (Workplace)	\$6,055	
National Grid (Massachusetts)	January 1, 2023-December 31, 2024	MUD	\$7,295	Includes installation rebate, EVSE rebate, and networking rebates net of third-party funding.
		Public	\$7,369	
		Workplace	\$4,356	
Pacific Gas & Electric (PG&E) ⁴⁹	January 1, 2021-December, 2021	MUD	\$13,326	Includes total customer-side costs and utility-side costs, “behind the meter” construction costs (including trenching), as well as estimated materials, design, and permitting costs but excluding charger costs, participation payments, and rebates where applicable. Utility costs represent “to the meter” construction costs (including trenching), as well as estimated materials and design costs.
		Workplace	\$15,688	
Public Service Enterprise Group (PSEG) Long Island	2021-January, 2024	EV-Make Ready (public, workplace, and MUD)	\$50,772	Utility-Side Make Ready and Customer-Side Make Ready Infrastructure costs.
Puget Sound Energy (PSE)	July 1, 2024 – September 30, 2025	Multifamily	\$10,534	Reflective of brand-new installations and not replacement projects.
		Workplace	\$10,523	
San Diego Gas & Electric (SDG&E)	2017-December 31, 2020	Power Your Drive Pilot (workplaces and MUDs)	\$23,000	All-in per port cost. Costs include materials, construction, engineering design, environmental testing, internal labor, IR billing system upgrade, third party project support, other, non-direct costs, and contingency. This excludes operation and maintenance costs.
Xcel Energy ⁵⁰	2021-April 10, 2024	Commercial ⁵¹	\$27,678	The average cost for charging installations includes EVSI and charging equipment.
		Multifamily	\$24,184	

Note: Utilities inconsistently reported costs such that cost details are reported where possible. However, in some cases, details of costs were very limited or not reported.

⁴⁸ See Appendix A for full citations.

⁴⁹ These costs were derived by combining the Total Utility Side Costs with Total Customer Side Costs and dividing by the number of ports installed.

⁵⁰ Multifamily only includes L2 chargers, while commercial sites include DCFCs.

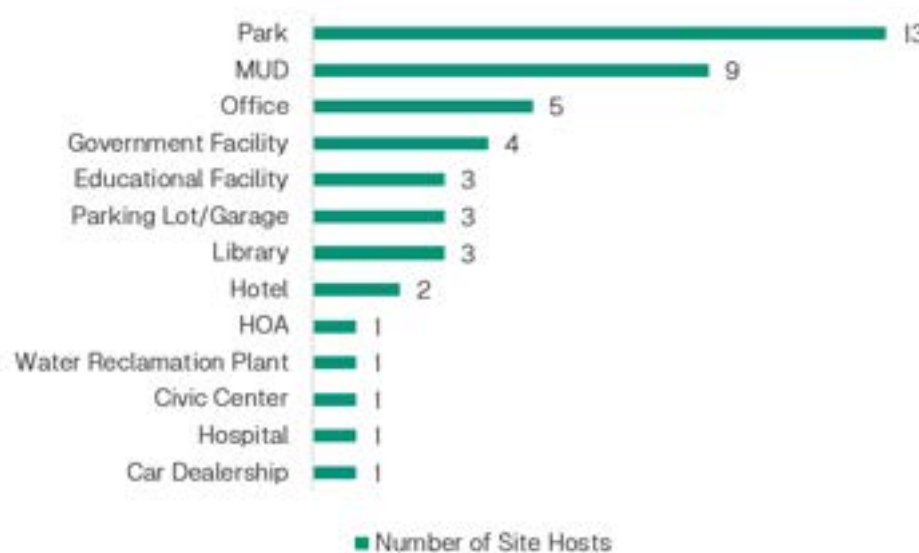
⁵¹ Commercial includes Fleet, Workplace, Community, and Public projects.

4.8 Site Host Interviews

The evaluation team collected feedback from participating site hosts to assess satisfaction and overall program experience. We conducted site host interviews on a rolling basis with those who were at least six months post-construction, where charging stations were installed and operational. Appendix A provides additional details on the sampling approach. In 2025, we completed two rounds of interviews with site hosts, one in the fall and one in the spring. The team interviewed 25 site hosts, representing 47 different sites, 22 of which were in DACs. Interestingly, nine of the 25 site hosts indicated they were not the individual who originally submitted the application. In these cases, a former employee had initiated the process. As a result, and due to the time elapsed since initial application submission, many site hosts had trouble recalling specific details related to initial enrollment experience and often relied on second-hand information or estimates.

Of the 47 sites represented, most participated in the CIR Program (36) or the CSMR Program (8), with the remaining sites representing Turn-key (3).⁵² For 77% of sites, the CRLD chargers were the first chargers installed at the location. Among the sites with pre-existing chargers, three referenced external grant funding to help finance the stations, one discussed CALeVIP, one mentioned prior experience with SCE rebates, one mentioned being gifted the chargers, and the remainder self-financed.. Figure 18 summarizes the site types represented in the 2025 site host interviews.

Figure 18. Site Host Facility Designations (n=47)



⁵² Note that we asked respondents to discuss their experiences with the CRLD Program overall and so responses do not necessarily reflect participant experiences with any individual site. Further, one site host also participated in the Program during the Pilot phase and, as such, their responses included their experiences with three Pilot sites that are not reflected in Figure 18.

4.8.1 Initial Program Impressions

Site hosts most frequently learned about the CRLD Program through SCE outreach. Twelve of the 25 site hosts cited SCE as their first information source, often referencing direct engagement from account managers (7) or email outreach specifically from SCE (5). Interestingly, four of the 25 site hosts learned about the program through trade professionals or their Network Service Providers (NSP). Less frequently cited sources included word of mouth, local trade shows, corporate communications, or pilot involvement. Three site hosts could not answer because they had not been involved in the initial application, several others noted their responses reflected second-hand information due to staff turnover or recall bias.

When discussing motivation for installation, site hosts most often discussed the desire to offer an amenity for potential users. Site hosts explained that installing the chargers would help draw additional customers or to remain competitive in the market. The next most frequently mentioned motivators for installation was to keep pace with growing EV demand at their properties. Several site hosts discussed insufficient EV infrastructure and others pointed to direct customers or tenant requests. In addition, eight site hosts mentioned future-planning or compliance considerations, including alignment with company goals, or long-term electrification mandates. Figure 19 presents a graphical summary of site host motivations.

Figure 19. Motivators for Site Hosts to Install (n=24)



Note: One of the 25 site hosts indicated they were not part of the decision to install. Additionally, interviewees often indicated multiple reasons for installations, so responses were not mutually exclusive.

Interview responses demonstrated that SCE's financial and infrastructure work was critical to the site hosts decision to install. Of the 23 site hosts who answered this question, only one indicated they still would have installed the same amount of chargers and at the same time, without financial support from SCE. Notably, five site hosts indicated that they would not have been able to install the chargers at all without SCE's financial support. Among the remaining site hosts, ten of them indicated they would have installed fewer ports and six indicated they would have waited longer to install. Three site hosts emphasized the importance of the electrical infrastructure work that SCE did, noting that this involvement was essential to project feasibility and they otherwise would not have been able to install.

4.8.2 Program Participation Experience

Overall, the majority of site hosts described the enrollment process as straightforward, clear, and easy to follow. However, four site hosts experienced issues with the software. Two site hosts indicated technical issues with the software, such as uploading issues or system bugs, with one site host noting that individuals with less technical experience would likely struggle. The remaining two site hosts explained that their projects were particularly complex, and they found the

navigation process unclear at times. Four site hosts indicated that support from their account managers was critical to completing the application process. Site hosts continuously praised the support provided by SCE account managers. Interviewees frequently mentioned account managers by name and described them as responsive, knowledgeable, and critical to moving along the process. One site host commented:

SCE is the most professional, helpful group of people I've ever worked with.

Despite the positive feedback on enrollment and support, 20 of the 25 site hosts reported challenges with the project timeline. Many acknowledged that delays were expected given the complexity of the construction and several acknowledged that external factors outside of SCE's control contributed to delays such as switch gear shortages or COVID. However, seven site hosts indicated that timelines were not clearly presented to them upfront or during periods of delays. One site host expressed that their trade professional initially estimated a three month timeline, but the project ended up taking three years to complete. Three site hosts expressed that these delays extended timelines created cascading challenges, including communication challenges with tenants or stakeholders, complications with grant funding, or technological obsolescence. One site host described this experience in detail:

There were some challenges with shifting timelines. We had an anticipated start date that was much sooner than what it ended up being. We were getting different messages about when the actual physical construction would begin... We had to keep updating our contracts with everybody especially with the grants, they usually only are a year, so we had to twice get amendments to extend those grants... By the time the project was moving forward into construction... the chargers we had originally intended to purchase had been eclipsed by newer technologies and the company was no longer selling them... Then we had to go through with Edison getting [the new version of these chargers] on its approved product list... which was the hardest part of this whole process.

Many site hosts attributed delays to external parties, such city delays or issues with trade professionals or network service providers (NSPs). More than half of the site hosts (13) indicated experiencing challenges with a charging station provider or other external party during installation or during maintenance. One site host noted that the unprofessionalism experienced by their trade professional has discouraged future participation in the CRLD Program. Five site hosts also described communication breakdowns among project stakeholders, particularly when issues arose during construction. Several noted that determining which party to contact for resolution was often unclear. One site host captured this frustration by explaining:

If the charger doesn't work and you call the charger company, they blame the software company. Call the software company, they blame the car. And I can't tell you how many times this has happened.

Eleven of the 25 site hosts reported post-installation issues related to the charging stations. While SCE is only responsible for maintaining and providing the charging stations for Turn-key participants, site hosts often seemed unaware of who was responsible for troubleshooting these issues. Issues ranged from minor networking problems and trouble with the app, to significant equipment failures that required total replacement. One site host expressed her lack of faith in equipment reliability for her fleet through the following:

We sometimes have two to one, where there's two chargers to one piece of equipment because it's critical equipment... The reliability issue is a problem.

4.8.3 Program Satisfaction

Overall, site hosts expressed high satisfaction with SCE's work. When asked to rank their satisfaction with the charging equipment installed through the CRLD Program, an average response of 9 out of 10 was given, indicating high approval with the final product. Despite the positive feedback, a frequently cited concern involved the length of the program contract, particularly given the rapid pace of EV charging technological advancements. Several site hosts expressed frustration with feeling locked into long-term agreements while equipment and infrastructure continued to evolve. One site host articulated this challenge as follows:

I have a lot of light duty chargers, and they're all on 40-amp breakers. Some of these are seven to eight years old. They're dying - they heat up, they cool down, they're falling apart. There's no such thing as replacing like with like. All of the electrical infrastructure is designed for that charger or at least that power of charger. We have progressed now, that's not adequate anymore. It's challenging to find replacement chargers for that infrastructure... My electrical infrastructure is outdated, and I can't replace it because it's all underground. It's a panel full of 40-amp breakers and I really need 60-amp breakers. I can't change that; I'm in the middle of a 10-year program. So now I'm buying garbage chargers.... A ten-year agreement is too long because the infrastructure doesn't last that long.

Program staff noted that concerns about the ten-year contract commitment most often arise among MUD customers and participants in the NCR program who'd like to make changes or expect to sell their property. While staff recognized these concerns—particularly for DCFC projects—they also emphasized that customers rarely withdraw from or cancel projects once installations are complete. In response to customer feedback regarding technological obsolescence, SCE raised the charger maximum output for the DCFC program so customers can select EVSE hardware up to 350 kilowatt. Site hosts also raised less frequent concerns related to outdated vendor lists, and feeling restricted by the APL.

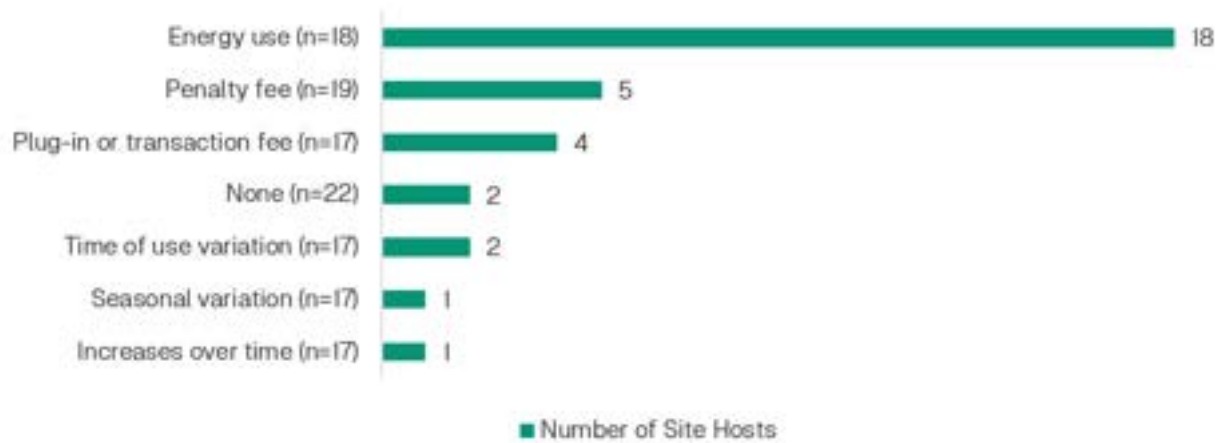
Another recurring theme among site hosts involved charger utilization levels. When asked about charger usage, 12 of the 25 site hosts reported the installed chargers were underutilized, noting that their sites appeared to have more chargers than current demand required. While most site hosts acknowledged the benefits of preparing for the future, and anticipate increased usage over time, three site hosts expressed frustration with the current underutilization, noting a disconnect between the installed capacity and local demand. One site host, a MUD property owner, further described their experience below:

We requested at all [of our seven] properties. The ones that were placed had the least demand...The ones that I have demand on; we couldn't get any of those approved. People are using them but they're not using them as much based on the demographic... It would've been nice to have them approved at some of the others that we had built in demand. It's going to take time to use them on a more active basis.

Site hosts are responsible for setting the fee schedule for their sites, although two of the 25 site hosts were unable to describe the fee schedule, and several additional site hosts only recalled partial details. The evaluation team excluded one site host who had fleet charging that directly billed to the city.

Two site hosts offered free charging sessions as an employee benefit. Only five site hosts implemented penalty fees, which varied widely from \$1 per minute up to a total fee of \$53, to an hourly \$1 fee. Many site hosts without penalties explained low charger usage did not warrant enforcement mechanisms. Two site hosts noted they relied on unconventional penalties, such as leaving ‘angry notes’ on vehicles that overstayed. The most common pricing approach was based on energy consumption, with rates ranging from \$0.13 per kwh to \$0.70 per kwh.

Figure 20. Fee Schedules Reported by Site Hosts



Reported benefits from participation varied across site hosts. Of the 22 site hosts asked about realized benefits, two indicated they had no observed benefits due to low utilization. Among the 20 site hosts who reported realized benefits, the most frequently reported benefit was attracting users to their property. For some, this meant attracting tenants by offering EV as an amenity, while for others this involved drawing in travelers or tourists, or recruiting and retaining employees by offering free workplace charging.

Additional reported benefits included higher satisfaction levels from users, increased convenience, and observations of increased EV adoption among users. See Figure 21 for further details.

Figure 21. Site Host Realized Benefits (n=20)



Note: Responses are not mutually exclusive.

4.9 End-User Surveys

The evaluation team conducted web surveys with 70 end-users, such as tenants and employees, who did and did not use CRLD charging stations in 2025. Survey questions centered around the impact charging station installation had on the decision to drive an EV, the impact the presence of a charging station had on the decision to move to a building with EV chargers, and charger user satisfaction and experience. Questions also focused on driving and charging behavior, respondent satisfaction with the charging fee schedule, and the fee schedule impact on charging behavior. End-users resided in MUDs and DACs and took the survey on a rolling basis via a flyer with a QR code.

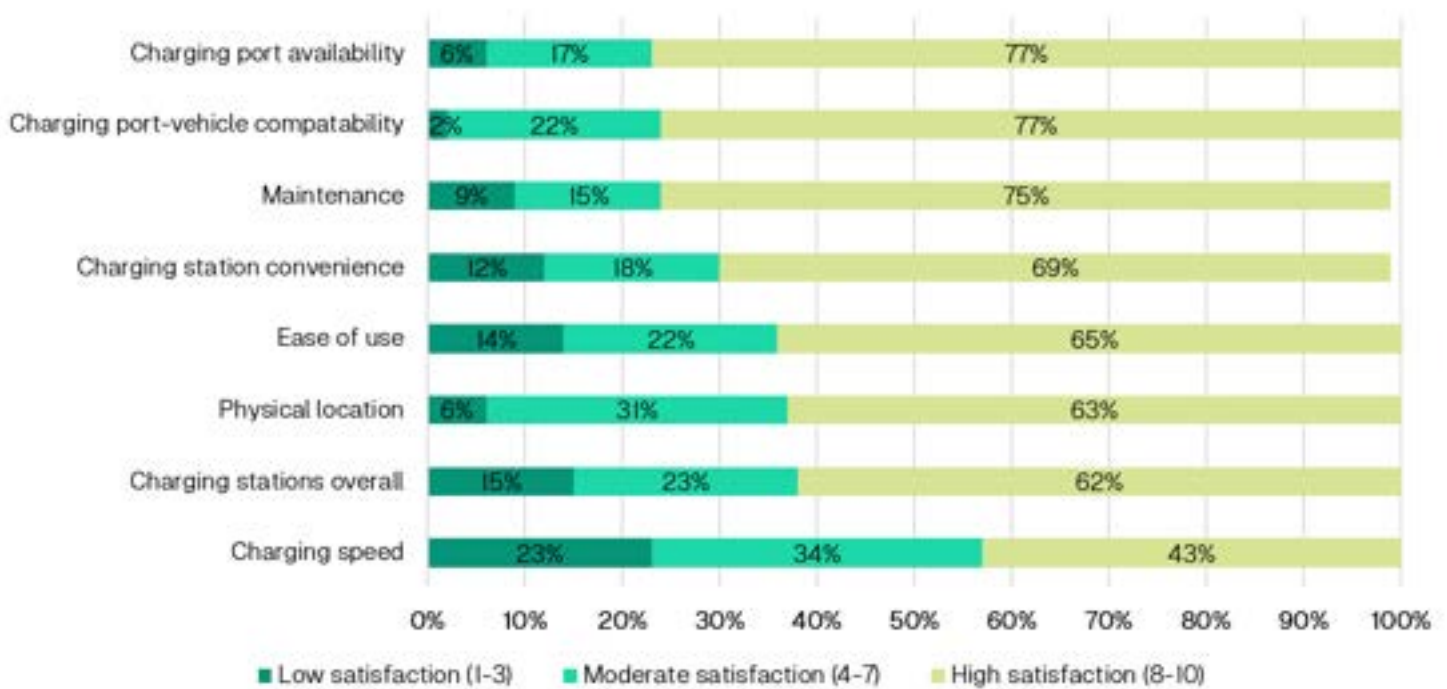
Respondents represented a diversity of ages and incomes, with 30% above 65 years of age and 16% earning a 2023 pre-tax household income of \$100,000-\$124,999. Respondents had varying experiences with EVs and with the charging sites of interest. The majority of end users (93% of 65 people surveyed) owned an EV, while 7% (5 people) did not. Most respondents (74%) drove a battery electric vehicle (BEV), and three-quarters of respondents (74%) drove their EV fewer than 299 miles in a typical week. One-third (33%) of chargers were located at MUDs, 30% were at local libraries, and 20% in commercial areas. Less than 16% of chargers were in public areas, field offices, campus parking lots, hotels or wastewater treatment plants.

Most respondents did not rely heavily on the surveyed location for charging their EV, as over half of respondents (54%) conducted 25% or less of their charging at the surveyed charging site. However, the charging site was seen as essential for the one-third (33%) of users who conducted over 76% of their charging there.

Respondents expressed high satisfaction with most aspects of the charging stations, as seen in Figure 22. They expressed highest satisfaction with charging port-vehicle compatibility and charging port availability.

Respondents were most dissatisfied with charging speed, with 23% and 34% rating their satisfaction as low and moderate, respectively. Respondents also expressed dissatisfaction with ease of use (14%) and the charging stations overall (15%).

Figure 22. Charging Station Satisfaction (n=65)

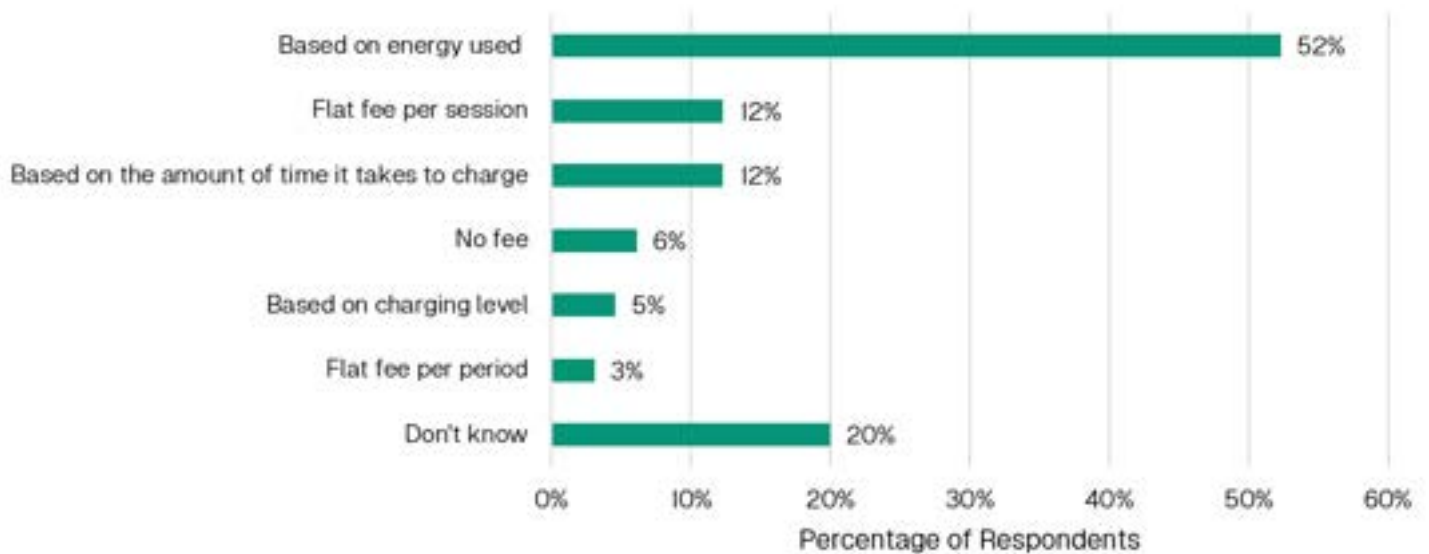


Note: Several percentages do not add up to 100% due to rounding.

Very few respondents (6%) charged their EVs at these sites every day, while another 8% charged there most days and 20% charged a few days a week. Sixty-five percent charged at the charging site either once a week, less than that or never. Those who were charging in other locations typically used public charging stations in addition to chargers located at work or at home. Half of respondents charged their vehicles to 80-100% while 26% of respondents charged until they needed to move their car. The remaining respondents (roughly 25%) changed their charging behavior based on fee session expiration, fee amounts, and charger usability.

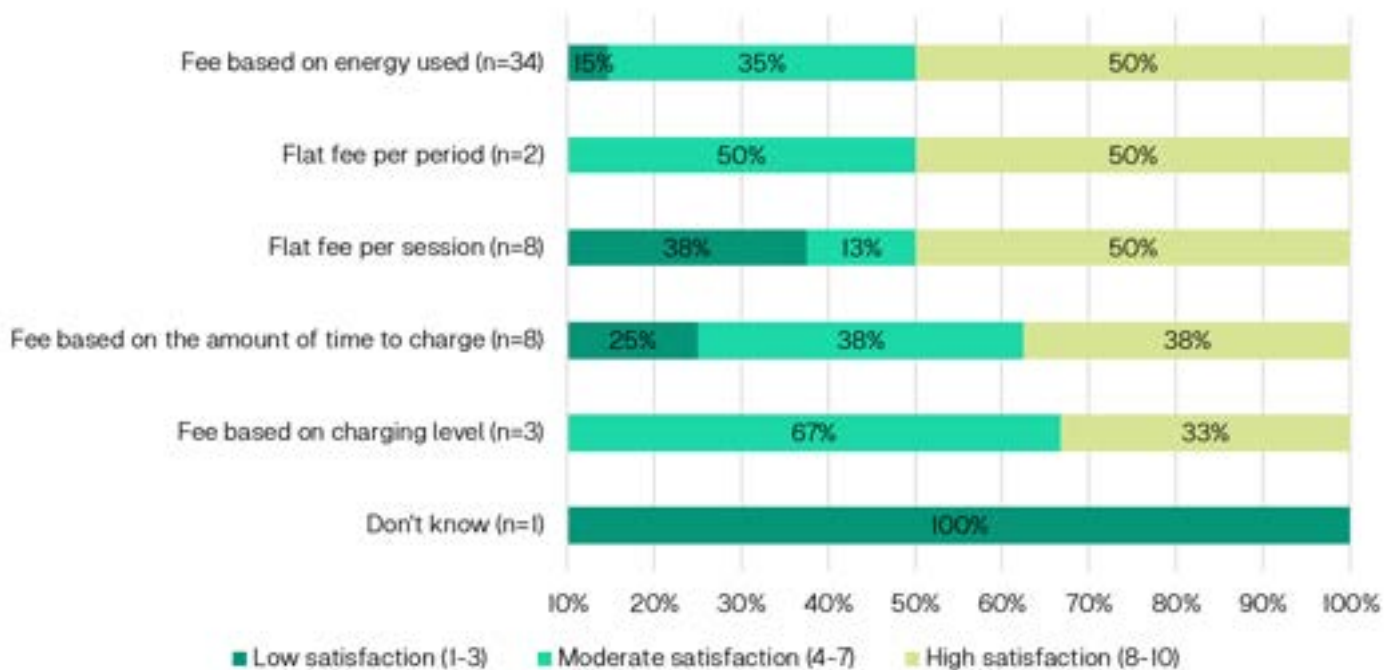
Fee schedules varied by charging station. Half of respondents used charging stations with a fee based on energy usage, as seen in Figure 23. The other half of respondents used charging stations with a fee based on the amount of time it took to charge (12%), a flat fee per session (12%) or no fee (6%). Twenty percent of those respondents did not know how the fee schedule was structured at their charging station but used it anyway.

Figure 23. Fee Schedule Utilized by the Charging Station (n=65)



Respondents were generally satisfied with the fee schedule at the charging station. Figure 24 shows that respondents (n=8) were least satisfied paying a flat fee per session. However, 50% of respondents were still highly satisfied with this structure. In addition to paying a flat fee per session, half of respondents were most satisfied paying based on energy usage and on a flat per period fee.

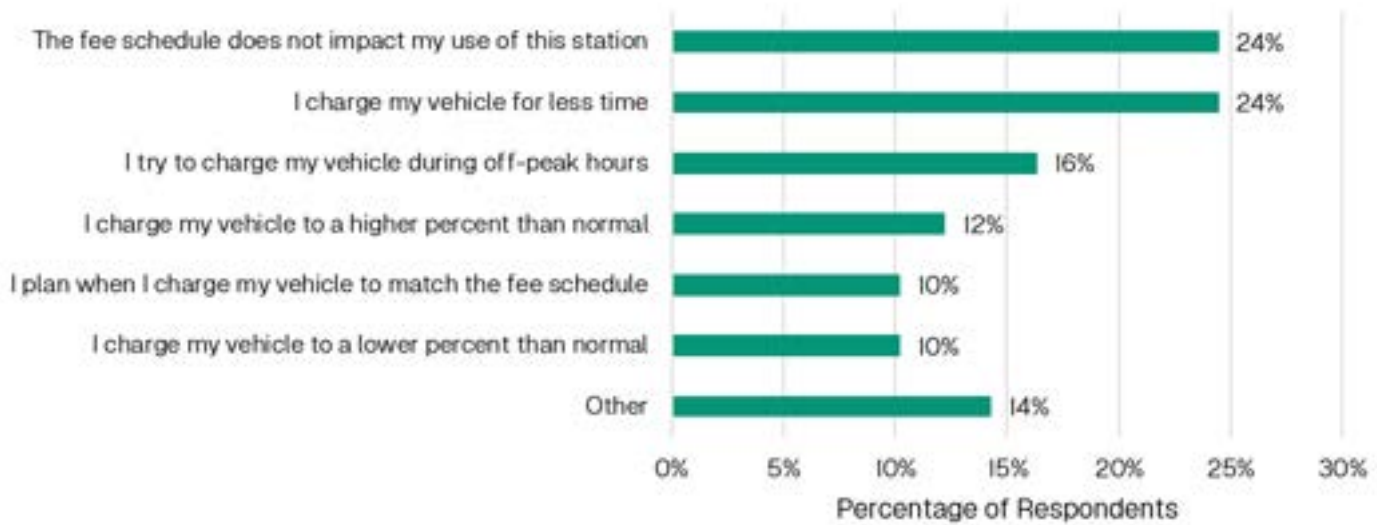
Figure 24. Respondent Satisfaction with Charger Fee Schedules



Note: Respondents were able to select multiple response options.

Fee schedules affected charging decisions for 75% of respondents (Figure 25). These respondents differed in their charging behavior by charging for less time (24%), on off-peak hours (16%), to a higher percentage than normal (12%), to match the fee schedule (10%), and to a lower percentage than normal (10%). Regardless of how respondents felt the fee schedule impacted their decision to charge their EV, the majority used charging stations with fees based on energy usage.

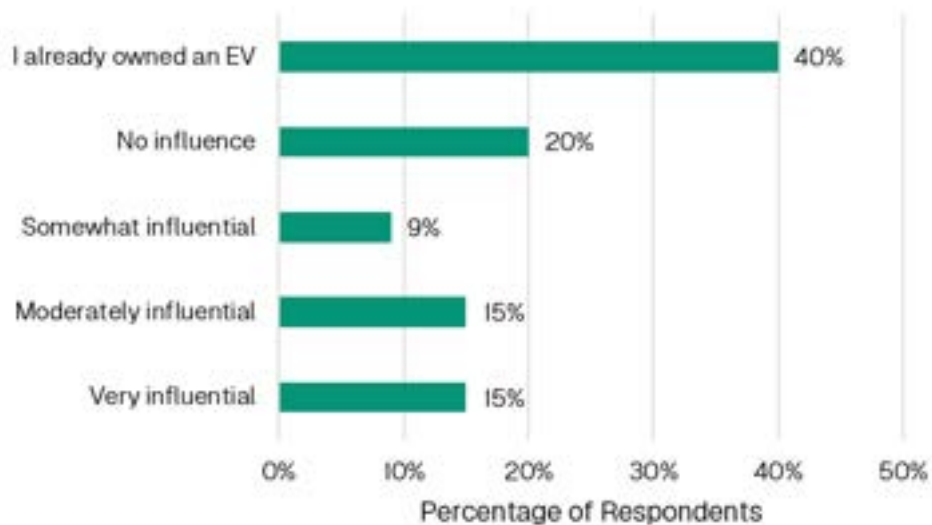
Figure 25. Impact of Fee Schedule on Respondent Charging (n=49)



Note: Respondents were able to select multiple response options.

The presence of charging stations was not influential in most respondents' decisions to purchase an EV, as demonstrated in Figure 26. For 75% of respondents living in MUDs, the existence of a charging site did little or nothing to influence their decision to live there. Twenty-five percent of MUDs residents already lived there before the charger was installed, 50% stated that it was either somewhat or not at all influential, while another 25% believed the charger was very influential in their decision.

Figure 26. Influence of Charging Stations on EV Purchase Decision (n=65)



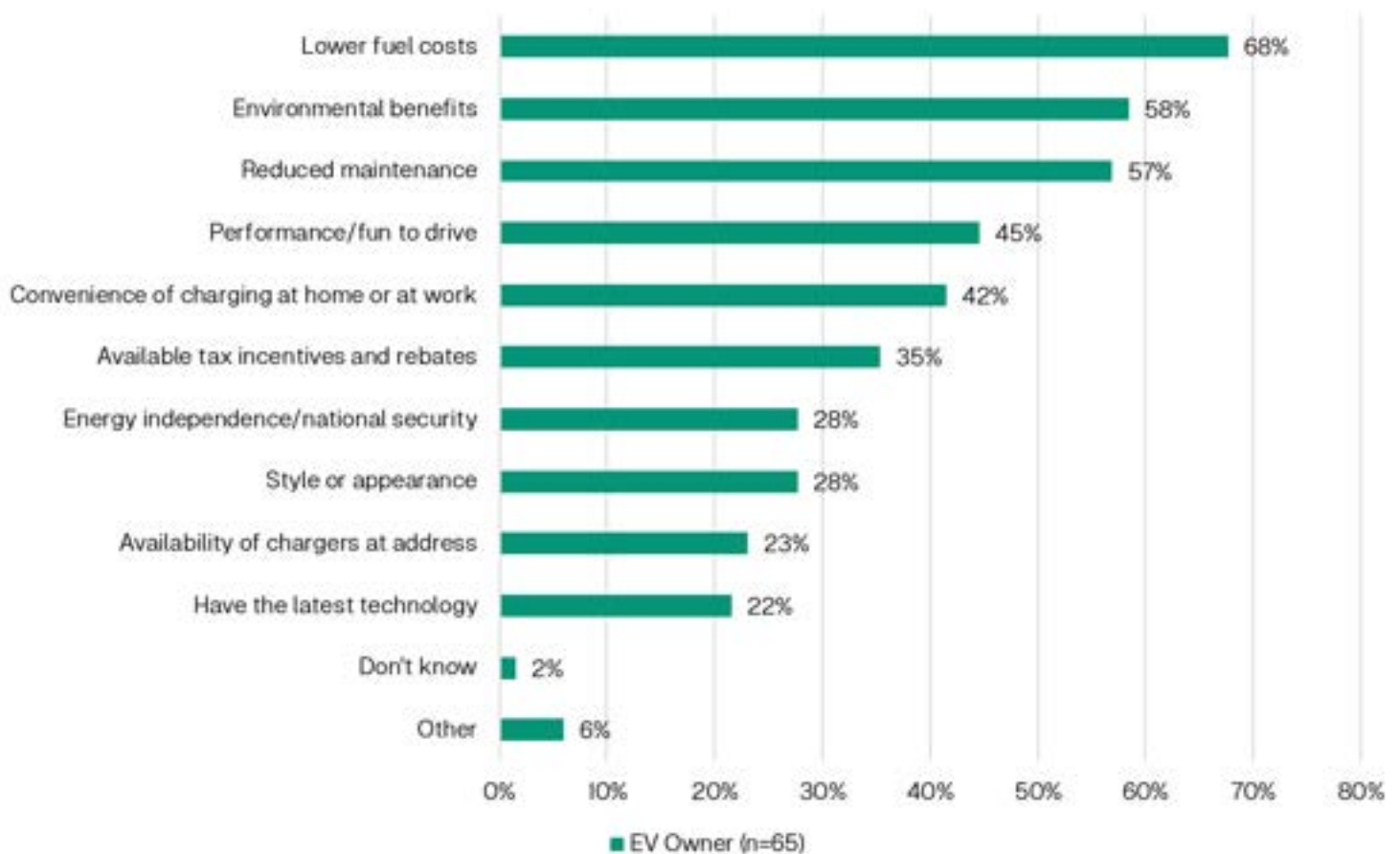
4.9.1 Charging and EV Awareness Among Non-EV Owners (n=5)

A small group of respondents (5 of 70) were non-EV owners. Despite not owning an EV, four of the five did use an EV charger to charge a vehicle. Only two of these respondents were very likely to consider purchasing an EV next time they were in the market for a new vehicle. These same respondents believed that having charging stations available at the surveyed address was very influential in their decision to consider purchasing an EV. Three of five non-EV owners believed that lower fuel costs were the biggest reason to consider driving an EV, while longevity of battery life was a key barrier to EV ownership.

4.9.2 Charging and EV Awareness Among EV Owners (n=65)

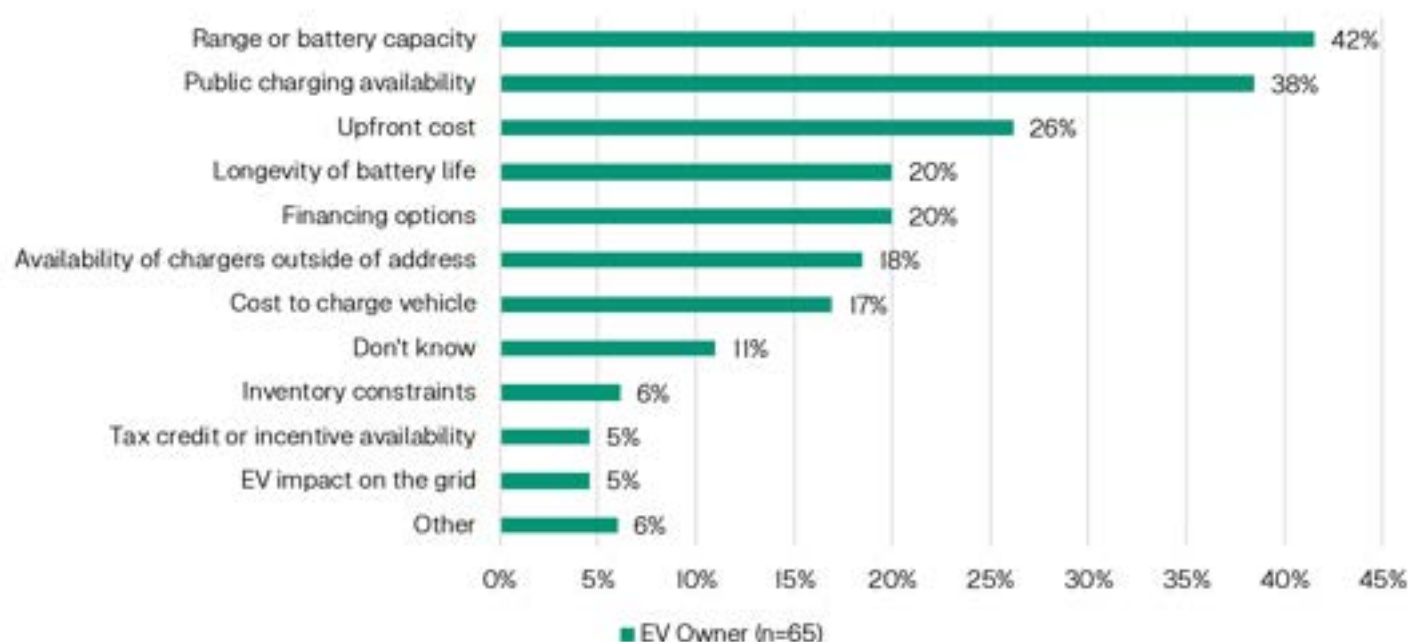
Among all respondents, over 50% believed that lower fuel costs, environmental benefits and reduced maintenance were key motives for consumers to drive an EV (Figure 27). Slightly less than 25% of EV owners believed that having the latest technology was a reason to drive an EV.

Figure 27. Benefits to Driving an EV



While there are many reasons people want to drive EVs, there are several key considerations for why they might not (Figure 28). Range or battery capacity (42%), public charging availability (38%), upfront cost (26%) and longevity/battery life (20%) were the most commonly cited reasons not to drive an EV.

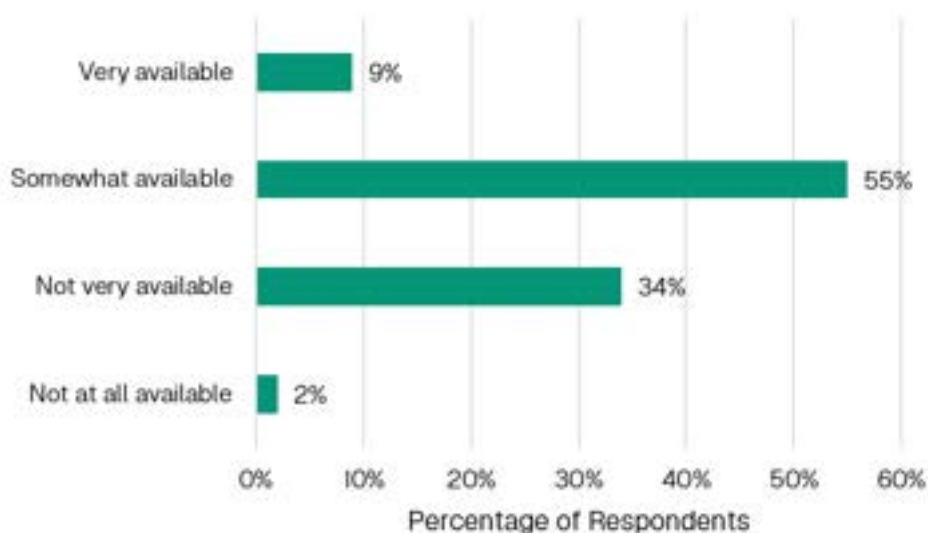
Figure 28. Reasons Not to Purchase/Own an EV



Most respondents were either very or somewhat familiar with the location(s) of public EV charging stations in the community. They expressed a similar level of familiarity with charging stations and charging technology more generally. 15% of EV owners expressed unfamiliarity with community charging stations.

Seventy-five percent of EV owners believed that there were not enough charging locations in their community. Fifty-five percent stated charging stations were somewhat available in the areas they frequent most, with an additional 36% reporting they were not often or ever available (Figure 29). A small percentage (9%) found charging stations very available in their most frequented areas.

Figure 29. Availability of Charging Stations in Most Frequented Areas (n=65)



4.10 Nonparticipant Interviews

The evaluation team conducted 21 interviews with property owners or managers of MUDs and business in DACs who were eligible for the CRLD program, but who had not yet participated. Research objectives for nonparticipant MUD and DAC business owners or managers were threefold:

- What are the barriers to installing EV charging?
- What are the perceived benefits to installing EV charging?
- What are strategies to overcome barriers?

Findings from the nonparticipant interviews are presented below and reveal barriers to EV charging site participation at businesses in DACs and at MUDs. Interest in installing EV charging sites at their properties was evaluated first by characterizing how much demand they see for EV charging and then by what benefits they could expect to realize after installing charging stations. Next, it was outlined how nonparticipants make decisions related to upgrades such as EV charging stations, and what information they need to make a confident decision, including trusted information sources. Research concluded with capturing their thoughts about the logistics involved with installation and what support nonparticipants would ideally like to receive to help with installing EV charging infrastructure.

The following provides a high-level summary of the findings.

Barriers: Uncertainties around the total installation cost and process, which may trigger associated infrastructure upgrades, made nonparticipants hesitant. The unpredictability of future EV charging demand made them question how soon they would see a return on investment (ROI), which is a key factor for them when deciding whether to move forward. MUD and DAC business owners also wanted assurance that charger maintenance and troubleshooting would be readily available if needed.

Motivators: Nonparticipant respondents viewed EV charging as a feature that could enhance property appeal and attract high-quality tenants or employees. They viewed SCE and contractors as having reliable and up-to-date information, and desired program support that would allow them to set appropriate charging rates. Having clear information on upfront costs, rebates, favorable payback periods, and program support would help nonparticipant respondents view EV charging more favorably.

Strategies to Overcome Barriers: MUD and DAC business owners wanted to comparison shop among contractors. They also preferred to receive information via email that details installation costs and steps. If SCE can facilitate nonparticipants' ability to obtain bids from approved contractors, it would provide a clear starting point for these property owners to confidently move forward in the process. Assurances of growing EV demand and timely customer service if something were to go wrong would further bolster their confidence to install EV charging.

Interest in installing EV chargers

Demand for EV Charging

Respondents perceived demand for EV chargers in their areas as somewhat limited, but expected it to grow over time. This anticipated growth prompted property managers and business owners to begin exploring EV charging installation options.

Many respondents recognized the value of investing early to avoid being forced into reactive adoption at a later stage. Additionally, business owners in DACs reported less current tenant demand than respondents at MUDs but were more likely to perceive the future potential for increased demand. Both DAC and MUD segments expressed a willingness to consider installing EV chargers, but at the same time expressed reservations about whether demand is sufficient to justify the cost

and effort of installing EV chargers. Overall, these findings indicate that while current demand remains limited, expectations of greater future demand are motivating installation considerations across both segments.

Perceived Benefits

Meeting current EV demand and attracting customers, tenants, or employees were the top benefits nonparticipant respondents see to installing EV charging (Table 33). Although nonparticipants felt that current demand was limited, 66% of respondents, especially business owners in DACs, said that they were considering installing EV chargers in response to inquiries received from customers, tenants, or employees about charger accessibility. One HR leader in a large company wanted to install EV chargers to accommodate 30% of employees who owned EVs. Another small business owner in a busy commercial plaza wanted to install chargers primarily for customers since, according to this respondent, “it’s almost a given and a requirement to have” available EV chargers. Benefits are detailed in the following table.

Table 33. Perceived Benefits

Perceived Benefits	MUDs (n=11)	Businesses in DACs (n=10)	Total (n=21)
Meet Current Demand	5	9	14
Attract More Customers/Tenants/Employees	8	4	12
Future-Proofing	8	2	10
Collect Charging Fees	2	3	5
Environmental Commitment	1	2	3
Community Engagement	0	2	2

Note: Multiple responses allowed

More than half (57%) of nonparticipant respondents identified attracting more customers, tenants, and employees, either currently or in the future, as an advantage of installing EV chargers. By offering EV charging at a workplace or residence, it was more convenient and saved time for the employees or residents of DACs and MUDs instead of having to make a special trip to charge their car. **These respondents perceived EV chargers as an amenity that enhances their business’s or property’s reputation and attractiveness, which they would highlight in marketing materials.** As one MUD property owner noted:

If you say there's EV charging within the property, it's more attractive...It boosts the overall satisfaction of the current and future tenants when people know they can reliably charge at the property. It's a convenience and reduces the frustration and that usually shows up in retention and how people talk about the property to others.

Nearly 50% of nonparticipant respondents (10 of 21) saw installing EV chargers now as a proactive measure to ensure that their businesses and properties are prepared for future demand (Table 33). These respondents, especially MUDs property managers and owners, recognized the growing adoption of EVs and expressed a desire to stay ahead of market trends rather than be compelled to adopt later. One property manager even explicitly said, “I don’t prefer to be forced into anything, and I just want to be ready for whatever the future holds.”

Additional benefits our nonparticipant interviewees thought they would realize after installing EV charging included collecting charging fees, demonstrating environmental commitment, and fostering community engagement. Five

respondents cited charger fee collection as a way to “recoup our costs” when considering charger installation but none described EV chargers as a means to generate profit. Three respondents, including two from large companies with more than 750 employees and one small MUD property manager, emphasized that installing EV chargers was both a demonstration and an execution of their organization’s commitment to environmental sustainability. Two respondents affiliated with businesses in DAC, including a CEO of a nonprofit organization and a senior director at a large company, also pointed out that offering EV chargers could enhance their community reputation and strengthen “partnerships with the community.” They noted that providing this amenity would not only serve local residents but also support their broader “community outreach programs.”

Decision-Making Process

The majority of nonparticipant respondents reported a centralized decision-making process, with a single party making decisions (Table 34). Most of our respondents were the sole party deciding whether to install EV chargers (15 of 20). MUD property managers and business owners said they would need to gather information about charger installation and discuss it with the property owners who would then make the final decision. Although only one party owned the decision, multiple respondents also said they had “influence” over the final decisions. In some cases, this “influence” also depended on personal relationships between respondents and decision-makers.

Table 34. Financial Decision-Making

Decision-Making	MUDs (n=10)	Business in DAC (n=10)	Total (n=20)
Centralized	7	8	15
Collective	3	2	5

Note: One respondent did not share this information.

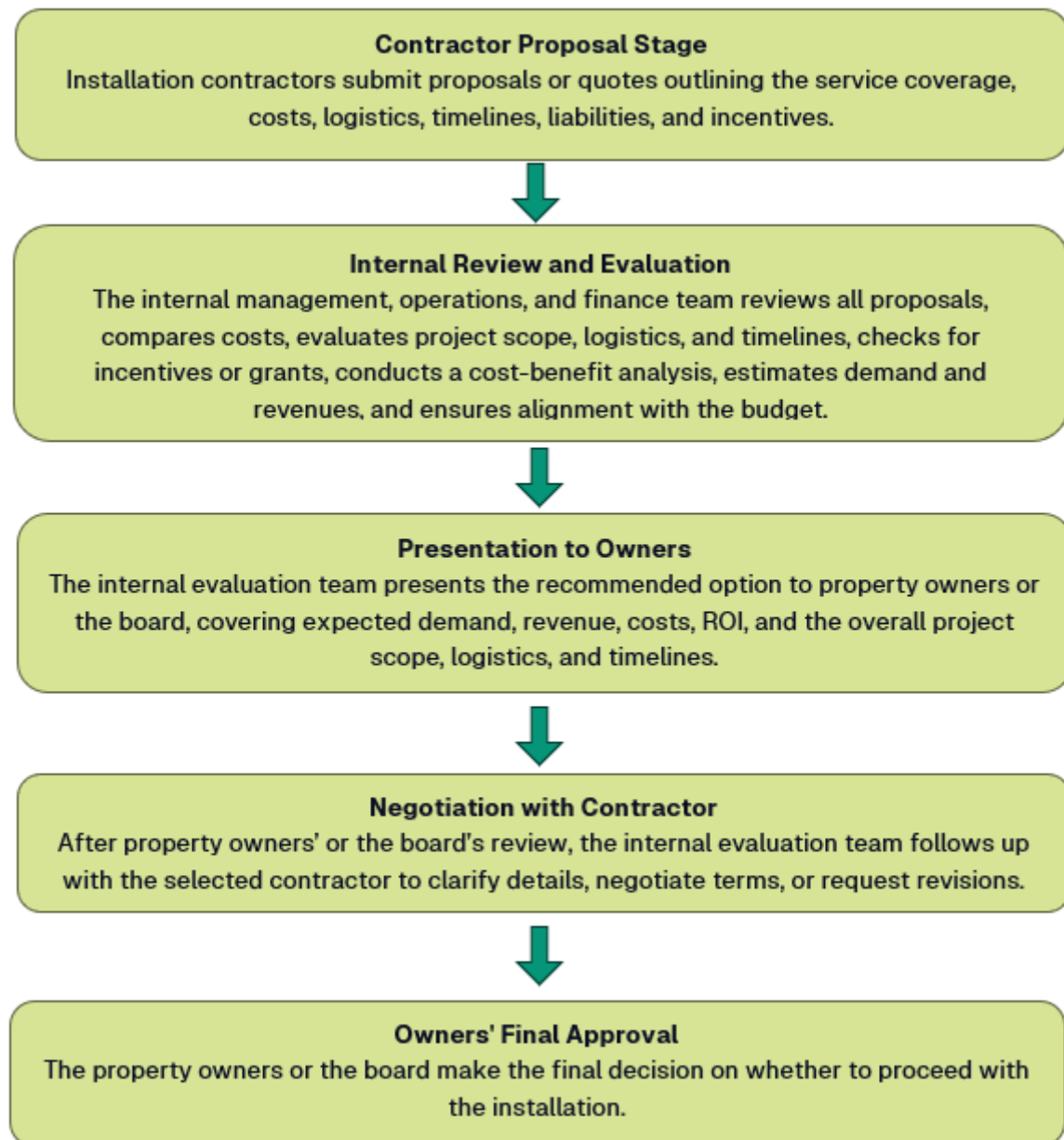
One quarter (25%) nonparticipant respondents (5 of 20) reported a collective decision-making process in which multiple parties, such as landlords, the “board of directors,” and internal management, operations, and finance teams, were involved in informing, negotiating, and finalizing the decision. This collective decision-making process could present barriers to installing EV chargers, as there were more aspects to consider and more stakeholders needing to sign off for approval. A senior director at a large business specifically reported a “vetting” process for stepwise evaluation and meetings:

We like to do our evaluation and our analysis first before we have a Teams meeting. You know, the second step for us would be a Teams or Zoom meeting, and then the third step would be a face-to-face meeting with a POC. We call it a POC, a point of contact at the organization, whether it's a manager, director, or somebody that's leading departmentally, and an account executive. ... First we need to evaluate the services offering, the scope, and scale. Are there any type of grant programs? Then a Teams meeting to go through Q&A to review the information they previously provided to us. ... It's a very detailed process for us. ... A lot of these initiatives are costly. We want to ensure that we have good partnerships. And regardless of what we think, feel, or believe of the information we're provided ... we still want to go through a formal vetting process.

A collective decision-making process typically involved a defined workflow with established steps and a timeline, along with standardized information requirements. Nonparticipant respondents highlighted that the typical information needed

in this process included forecasted charger demand; installation, operational, and maintenance costs; project scope, logistics, and timelines; contractor/vendor service coverage and liabilities; and finally, available grants, potential revenue, and ROI estimates. Figure 30 illustrates the typical workflow described by respondents. The collective decision-making process shared similarities with the centralized decision-making process in terms of having a single party to finalize the decision, but it involved more mid-level stakeholders and unfolded across multiple layers in a more collaborative manner.

Figure 30. Financial Decision-Making Process



None of the MUDs nonparticipant respondents surveyed had HOA policies governing EV charger installation at their sites. However, one property manager oversaw a single unit in a large apartment complex with an HOA. She observed that the HOA governed the decision-making process yet had no guidelines for EV charger installation, which meant there was no clear path forward for residents who wanted EV charging. According to one respondent, this complicated the process for individual property managers to move forward with installation:

So even if I said yes, it doesn't necessarily mean anything, right? So, we (property managers) have to all go get together and convince a board, and then from there you have to talk to the HOA, and then we have to deal with budgets and all those things. So, it has complicated things, and sometimes it's a turn off when we're looking for tenants.

All nonparticipant respondents cared about their ROI when considering installing EV charging. 64% of respondents reported consideration of several factors when calculating their ROI estimations, including the estimated demand for EV charging, charger purchase or leasing expenses, installation costs, ongoing operation and maintenance costs, charging fees, available incentives, tax deductions, potential revenue, and payback period. They also recognized the value of “branding” and “making property more attractive,” which contributed to other less quantifiable ROI calculation inputs. Three respondents sought general information on costs, revenue, and installation timelines, and one did not have any expectations for ROI.

Nonparticipant respondents varied in their estimates of payback periods, with those affiliated with larger companies generally anticipating shorter timelines than those from smaller companies. For instance, one property owner from an investment group across 50 states anticipated a payback period within likely “a fiscal year,” while a property manager at a large property management company that oversees multiple properties throughout the U.S. and Canada expected a range of three months to two years. Conversely, a small business owner in an area with many EV drivers anticipated a payback period within five years. Regarding ROI percentages, expectations also varied: a real estate developer designing a mix of small and large buildings in a major city anticipated a 20% return as “a general rule for profit,” whereas a property manager from a large property management company considered “breaking even” or earning “small revenue” within three months to two years acceptable. Similarly, an HR leader at a large business with more than 700 employees deemed “breaking even” acceptable. Overall, these responses suggest that both payback period and ROI percentage expectations vary by business size.

Information Needed to Make a Confident Decision

Since our respondents were nonparticipants in the CRLD Program, and most had not installed EV charging, an exploration was undertaken to determine what information they would need to feel comfortable moving forward with charger installation and program participation.

Both nonparticipant business and MUD owners wanted information regarding installation costs, the installation process, and potential ROI before deciding to install EV charging at their properties. Cost was a key consideration for both DACs and MUDs segments, as they needed more information to justify the expense. Table 35 highlights the types of information respondents wanted to know before installing EV chargers. We elaborate on each of them below the table.

Table 35. Information Needed

Information Topics	Multi-Unit Dwellings (n=11)	Business in DAC (n=10)	Total (n=21)
Installation Cost	5	5	10
Installation Process	4	3	7
Return on Investment (ROI)	3	3	6
Customer Demand	0	4	4

Information Topics	Multi-Unit Dwellings (n=11)	Business in DAC (n=10)	Total (n=21)
Charger Operation and Maintenance Customer Service	3	0	3
Program Rebates	0	3	3

Note: Multiple responses allowed

Almost half (47%) of nonparticipant business owners and MUD property owners desired to learn more about the installation costs. These respondents wanted to know how much it would cost to purchase or lease the chargers and the cost associated with installation. They wanted to “come down to numbers” to better understand expenses and bolster confidence in their decision-making. Two MUD property managers also noted the value of “comparison bids” from different EV charger providers so they could compare costs and services to make the best choice.

Both segments also emphasized the importance of understanding the installation process before deciding to move forward. Respondents were largely unfamiliar with the steps involved in installing EV charging, as 30% of respondents said they would like to know the specific steps and “lengths they would have to go to” during installation. One property manager highlighted that the “fear of the unknown” would cause stress and questioned if the “stress was worth the benefits.” Another property manager wanted to access “some sort of guideline” or “even like a video” for project planning. According to these interviews, a clearer understanding of the installation process would help respondents better evaluate and decide whether to cover the expenses.

Nearly 30% of nonparticipant respondents desired information about ROI assessed through a cost-benefit analysis. To make the investment financially appealing, respondents wanted to see the numbers in writing, outlining costs relative to potential revenue. The costs in this calculation included the upfront cost of charger purchase or leasing, installation labor and materials, as well as the ongoing costs of operation and maintenance. The benefits nonparticipant respondents perceived as helping to offset costs included charging fees collected from EV chargers and the “incentives when you install.” Three business owners in DACs desired details about the rebate and wanted to understand “in full detail” the rebate amount, what project components it covered, the rebate processing timeline, and the total costs after rebates. Additionally, factors such as the estimated demand for EV charging, the investment payback period, and the long-term potential to increase business and property marketability would also inform the expected ROI. Respondents said they would weigh these factors to conduct a cost-benefit analysis and develop an understanding of the potential ROI, allowing respondents to justify the costs or to decide against proceeding with the project.

Nonparticipant business owners in DACs, as shown in Table 35, expressed a particular interest in estimating customer demand for EV charging, in addition to the other frequently mentioned topics. Previous findings indicated that DAC business owners reported slightly lower current demand but were more likely to perceive future demand than property managers and owners.

To support their decision-making regarding EV charger installation, four business owners in DACs would like to see estimates or forecasts of demand for EV charging. These estimates or forecasts could derive from existing market data, such as EV charger demand in adjacent neighborhoods, charger utilization rates at comparable sites, and performance data from charging network platforms or charger apps. Respondents stated that if demand potential was deemed insufficient, it might not justify their installation costs. A business owner in DAC wondered if EV demand was still growing:

Aren't EV car sales going down? Like, unfortunately, if they've come down a whole bunch and a lot of manufacturers are abandoning.

MUD managers and owners sought more information about customer service, especially regarding the timeliness and responsiveness of addressing any EV charger operation and maintenance issues. In interviews, nonparticipant property managers and owners noticed slightly higher current demand compared to business owners in DAC. As a result, installing EV chargers was perceived as a way to future-proof their properties and attract more tenants. To ensure tenant satisfaction and enhance tenant loyalty, three MUD property managers and owners expressed interest in knowing whether SCE could provide timely and responsive customer service in case something went wrong with the chargers. They wanted to make sure that tenants could access customer support when having “concerns with billing or any issues.” As noted by one property manager when comparing program support with charger company services:

For me, it's about knowing who is going to provide me the best customer service. ... I need to make sure that I'm speaking to a live agent, that the service is quick, that my tenants won't be upset if something happens, and that they can get credited quickly. I really make that my number one concern. So that's what I usually compare: customer service. Then I test it myself. I'll check to see how long it takes you to take care of it.

Where They Go for Information

SCE and contractors were the most trusted sources of information (Table 36). Fifty-seven percent of the nonparticipant respondents (12 of 21), especially business owners, reported SCE as the most trusted information source, mainly because of their interest in using rebate programs to move forward with the installation. Additionally, eleven respondents (11 of 21), especially MUD property managers or owners, noted that they would seek information from contractors, including charger network companies that partnered with properties and businesses for EV charger installation and maintenance, as well as EV charger installers such as electricians. They viewed these groups as having accurate information because of their technical expertise, “knowing about the codes and timeline and what's real,” as well as their established reputation in the industry or existing relationships with respondents.

More than one third (33%) of respondents (7 of 21), especially property managers, said that they would turn to Internet search platforms and AI products to gather initial information.

Seven respondents also recognized the value of information sharing through professional networks and events, such as business owner and landlord groups, which served as forums where they were actively engaged and attentive, primed to receive information. Overall, respondents in both DAC and MUD sectors considered SCE and contractors the most reliable information providers.

Table 36. Trusted Information Source

Trusted Source	MUDs (n=11)	Businesses in DACs (n=10)	Total (n=21)
SCE	4	8	12
Contractors (e.g., charger network companies, electricians)	7	4	11
Professional networks and events (e.g. colleagues, property owners, landlord groups, business owner groups)	3	4	7
Internet search and AI products	5	2	7
Local government	1	1	2
Social media	1	0	1

Both nonparticipant MUD property managers and small business owners in DAC areas preferred to receive EV charging information via email (Table 37). Seventy-six percent of nonparticipant respondents (16 of 21) preferred email as a communication channel because it allowed them to passively receive information without actively initiating the search, engaged them digitally, aligned with their usual work tools, and was less intrusive than other methods. Twenty-nine percent of respondents preferred traditional channels like phone calls, 19% liked utility channels such as bill inserts, and 14% wanted physical mail. One HR leader in a large company preferred to learn more through “program representatives” they had worked with before at SCE. Overall, nonparticipant respondents preferred digital engagement, while printed materials like mailed bill inserts were less effective at capturing attention. One respondent even said, “nobody reads paper statements anymore unless they're over 60.”

Table 37. Preferred Information Channel

Preferred Receiving Channel	Multi-Unit Dwellings (n=11)	Business in DAC (n=10)	Total (n=21)
Email	8	8	16
Phone (call or text)	4	2	6
Utility channels (e.g., bill inserts, online portals, account representatives)	3	1	4
Mail	0	3	3
Program representatives	0	1	1
Social media	0	1	1

Note: Multiple responses allowed.

Logistical Factors

Half (50%) of nonparticipant DAC business owners and 82% of nonparticipant MUD property managers expressed concerns about the installation process. They questioned what it would entail, how long it would take, and how difficult it would be. Respondents also worried about the installation costs and whether these could be split with property owners or tenants. To them, the installation process was “more of an unknown. You don't know until you agree to do it.” The uncertainty potentially poses a barrier to program participation.

The majority of nonparticipant respondents were comfortable with installing at least four ports in their parking areas and had no issue with Wi-Fi service in the parking area. Some respondents explicitly said that they were willing to use SCE-approved contractors to “ensure that the installation meets code and program requirements, especially when there are rebates or incentives involved,” as long as the cost of approved contractors aligned with their expectations.

A few nonparticipant MUD property managers and owners raised concerns about EV charger placement, operational disruptions, and electrical panel capacity. Two MUD property managers mentioned that designated parking spots could create fairness issues among tenants, especially when converting spots to “EV charging only” or when EVs outnumbered chargers. One MUD property manager also noted potential operational disruptions as “a huge concern” and preferred “minimizing” them. Four property managers (4 of 11) expressed worry about insufficient electrical panel capacity, which would require costly infrastructure upgrades and could hinder installation. As one MUD respondent who had installed EV charging at one of their properties noted:

The challenge wasn't the design or the charger installation itself. It was bringing the old infrastructure up to a point where everything could support the additional demand without risking any reliability issue later. ...I just installed a new panel only for EV chargers instead of everything. This can add both cost and complexity, including coordinating with the electrician, getting permits and sometimes temporarily disrupting the building operation for that.

Nonparticipant respondents also expressed some concerns related to staff capacity, costs, and available services if there were maintenance issues. Seventy-one percent of respondents were not concerned about their staff’s capacity for coordinating with the service provider. Six respondents, however, expressed concerns about maintenance costs and the reliability and timeliness of customer service if a third party maintains the chargers. Four respondents were unsure what responsibilities their staff would need to take on related to coordinating with the service prover (Table 38). One DAC business owner said:

Maintenance of the chargers, how is that going to work? Who's responsible? I don't want to be responsible for it.

Table 38. Operations and Maintenance Staffing Concern

	Multi-unit Dwellings (n=9)	Business in DAC (n=5)	Total (14)
Has Staffing Concern	3	1	4
No Staffing Concern	6	4	10

Note: Not all respondents shared this information.

Six nonparticipant respondents wanted guidance for usage management to control dwell time and charging wait times. They wanted to know useful strategies and tools for managing parking overstay after charging completion and avoiding unauthorized use of EV charging spots.

Seven nonparticipant respondents also shared concerns regarding additional risk factors such as vandalism and weather-related malfunctions. Two respondents mentioned fire risks associated with EV charging in the parking area, while two others expressed concern about charger malfunctions due to rain and wind. Additionally, three respondents were worried about vandalism and considered using security cameras to mitigate these risks.

Attractive Program Support

Just over half of the nonparticipant respondents were aware that programs were available to assist with installing EV charging. Fifty percent of DAC business respondents were aware, while 80% of MUD managers were aware of such programs. Lack of program awareness could hinder charging participation if eligible participants do not realize the breadth of financial and logistical support available. Table 39 lists the types of program support that respondents were interested in receiving.

Table 39. Respondents’ Interest in Program Support

Program Support	# Interested DAC Respondents (n=10)	# Interested MUD Respondents (n=11)	Total (n=21)

Site Visit	7	7	14
Port and Charger Advice	7	6	13
Charging Rate Advice	7	6	13
Rebate	4	3	7

Nonparticipant respondents from DACs and MUDs were equally interested in site visits. They were primarily interested in receiving expert assistance to ensure the chargers were placed in an appropriate location. One DAC respondent stated:

The more expert help there is, particularly from a partner like SoCal Edison or someone where we would have a lot of faith in their expertise, that they're not trying to sell something, they're trying to help you, we would welcome that.

One respondent was not interested because they believed it would not be difficult to determine charger location, and another planned to have a friend in the industry come on-site rather than someone he did not know.

Respondents from DACs and MUDs were interested in receiving port and charger advice as regards number required, type, and configuration because they wanted free information and advice from experts to make an informed decision about installing EV chargers. One respondent from a MUD shared that they felt this type of service was an expectation of participating in a program, expressing:

I just expect that someone who is an expert in their field [will] come over and tell me what their thoughts are and what's optimal, because if not, I'm kind of angry...

Other respondents from DACs were interested in advice on ports and chargers so that they would be ensured they had enough capacity available to serve as a convenience and generate revenue. Two respondents from MUDs were not interested in the program offering because they did not need more than the minimum four ports due to their small parking lot and constrained electrical panel.

Sixty-two percent of nonparticipant respondents were interested in receiving advice on what rates to charge EV owners charging their cars. Three respondents (two from DACs and one from a MUD) were interested because they did not know that they could charge a fee for using the charger and wanted information on how to set that up. Four other respondents (two from DACs and two from MUDs) emphasized the usefulness of expert advice. As one mentioned:

Yeah, I think that would be great information to have because we would have no idea what...is the going rate, how do you structure it? Do you do peak pricing, all of that kind of stuff. There are experts that know how to do that. We certainly don't know how to do it.

One respondent from a DAC mentioned two reasons why the charging rate advice would be useful for them:

One is we're conscious about our investment and so we want to be sure that the finances that we model for this is what works out to be the case. And then second, we want to be sure that our employees feel that it's worth their

worth, you know, I mean, if we put the fees too high and nobody used the chargers, that wouldn't be worthwhile either...

Taking advantage of rebates was the least popular program support option, as just 30% of respondents were interested in them. Rebates were attractive because they reduced the up-front cost of the charger. However, one DAC respondent mentioned that they did not have the staff capacity to manage the rebate application process and a MUD respondent emphasized that the rebate amount was not attractive enough for them to participate in the program.

Also explored was whether program requirements presented barriers to participation. TOU and DR participation was not a barrier for approximately 50% of nonparticipant respondents because they were likely already on one or both plans, or were satisfied enrolling in them. Two DAC business owners who did not think they were on TOU rates had concerns about moving to such a rate. They both felt the TOU rate would lead to increases in their electricity costs because they were unwilling to modify their usage during peak times and therefore did not want to participate in the program if it required them to switch rate plans.

The program requirement that chargers be operational for 10 years was not a deterrent to participation. Seventy-six percent expected that the chargers would remain installed and operational for that long. Three respondents wondered what would happen if they sold their property, but this was a potential barrier to participation for only one MUD respondent, who expressed concern that the new property owner might not want the charger.

4.11 Electric Vehicle Service Provider Interviews

To better understand how the CRLD program has influenced hiring practices and workforce needs, we conducted 10 in-depth interviews with Network Service Providers (NSPs) and Trade Professionals who have been involved in the program since 2021, collectively referred to as electric vehicle service providers (EVSPs). Table 40 explains the differences between NSPs and Trade Professionals. The interviews explored several key areas, including company involvement in the program, workforce demand and development, job creation and hiring strategies (both overall and within DACs), EV charging cost structures, and experiences with the application and implementation processes. Respondents also shared their satisfaction with the CRLD program and provided suggestions for improvement.

First, we present a high-level summary of findings across two areas: Workforce Impacts and Program Strengths and Improvement Areas. We then describe EVSP backgrounds and CRLD involvement, followed by detailed findings in each of these areas.

Workforce Impacts: Overall, EVSPs reported that CRLD participation influenced workforce demand and training needs in ways that varied across companies and over time. Periods of increased funding availability and post-pandemic backlogs often drove temporary increases in staffing. In contrast, hiring managers at EVSPs made longer-term hiring decisions in response to market uncertainty and unpredictable project timelines (i.e., application review and design revisions and approvals). At the same time, EVSPs generally viewed CRLD-related training as useful for establishing initial understanding of program requirements. However, they identified gaps in ongoing education, including limited updates on program changes and compliance requirements, as well as a lack of refresher or advanced trainings over time. Together, these findings indicate that more predictable project timelines, along with consistent and clearly communicated ongoing training resources, could improve workforce planning and readiness as the CRLD program continues to evolve.

Program Strengths and Improvement Areas: Respondents reported mixed satisfaction with components of the program. Trade professionals that were most satisfied with the program had a designated point of contact at SCE, who facilitated timely communication, clear guidance on program and technical requirements, and efficient resolution of issues. In contrast, those without an assigned contact reported delays, inconsistent information, and greater administrative burden.

Experiences with the application process were similarly mixed; while some trade professionals viewed it as well designed and supported by useful tools such as SCE’s portal, others described it as time-consuming due to additional design rigor and the need to relay information across internal teams and site hosts. On the NSP side, respondents expressed overall satisfaction with the program but emphasized a need for more standardized data-sharing practices. Furthermore, EVSPs reported strong, cooperative relationships with site hosts and played an important advisory role in pricing. At the program level, respondents valued CRLD’s overall design, outreach, and role in enabling projects that might otherwise be cost-prohibitive, but raised concerns about funding continuity and limited transparency around timelines. These findings suggest that establishing or strengthening consistent points of contact and improving transparency around processes and timelines could enhance program experience across EVSPs.

EVSP Background and CRLD Involvement

Services Offered

The EVSPs that we interviewed as part of this evaluation spanned a range of company sizes, with most headquartered in California and primarily serving MUDs. We interviewed a total of ten companies providing NSP services; seven out of those ten were trade professionals.. (see Table 40 below for a description of EVSP categories). They offered a range of services, including EV charger manufacturing and installation, software and network management, ongoing operations and maintenance, and customer data reporting. The companies that we interviewed ranged from small, regionally focused providers to large national firms, with headquarters primarily in California and operations spanning multiple U.S. states. Table 41 shows the range of the number of employees in each of the companies we interviewed.

Table 40. EVSP Services

EVSP Category	Core Role	Focus	Typical Responsibilities
Network Service Provider (NSP)	Backend software and connectivity, customer-facing charging service	Charger network operation and data management, user experience, access, and billing	• Provide cloud/network platform • Monitor charger status remotely • Manage firmware and diagnostics • Operate the charging network for drivers • Manage pricing and payment systems • Run mobile apps and user portals • Handle memberships and roaming • Offer APIs for integration • Aggregate usage data and analytics
Trade Professional	Third-party companies and vendors (EV charging vendors, contractors, architects, engineers, design professionals, distributors, project managers, and consultants) that help SCE customers implement electric vehicle charging station projects	Supporting customers through the Charge Ready program	Assisting customers through the CRLD Program through a range of services including, but not limited to: • Project management • Site design and engineering services • Customer-side construction • Charger installation, testing, and commissioning

Table 41. EVSP Company Size

Company Size
1 – 50 (n=2)
51-100 (n=3)

101-200 (n=2)
201-300 (n=1)
1000+ (n=1)
Unknown/Not reported (n=1)

Most EVSPs that we interviewed have supported a substantial number of CRLD projects since 2021. Several respondents described a focus on multifamily properties and DAC-located projects, often reflecting higher available incentive levels and an interest in supporting EV adoption in communities facing greater access challenges; these EVSPs reported using mapping tools and census data to identify incentive-eligible territories. Others characterized DAC participation as driven primarily by site eligibility rather than a distinct strategic priority. One interviewed company reported working exclusively with commercial-sector sites.

Motivation and Entry into the Program

EVSPs typically learned about CRLD through direct outreach from SCE staff they were already working with on prior projects in their service area, prior program participation (e.g., Charge Ready Transport), or word of mouth, and were motivated by both customer demand and the availability of incentives. Many respondents first became aware of the program through customer-driven inquiries, particularly when site hosts asked about available rebates. For others, prior experience with SCE or other utility programs naturally led them to expand into CRLD as an additional offering. For example, one EVSP began as a lighting trade professional and later pivoted to EV charging.

Primary motivations for program participation included supporting business growth, responding to client demand, and leveraging incentives to make projects financially viable, especially in multifamily and DAC contexts.

“Programs like these are very helpful in enabling lower-cost options for multifamily and other public-use applications, which is our bread and butter.”

Several EVSPs also reported concurrent involvement in other SCE or California incentive programs (e.g., Charge Ready), viewing CRLD as part of a broader portfolio of utility-supported EV charging work.

Workforce Impacts

Changes in Workforce Demand

CRLD participation contributed to periods of increased workforce demand, though impacts varied over time and across companies. Many EVSPs reported that demand for EV charging work increased during periods when funding was more readily available at the state or national level, or when firms were working through backlogs following the COVID-19 pandemic. These conditions often prompted EVSPs to expand internal teams focused on design, installation, program management, and customer coordination. In several cases, respondents explicitly attributed these staffing changes to CRLD participation.

“We expanded our design and installation teams to meet the increased demand and timelines associated with CRLD projects.”

However, respondents also emphasized that workforce demand fluctuated due to broader market conditions. Some EVSPs indicated that while CRLD initially drove hiring, recruitment slowed or paused as companies experienced internal budget constraints.

“A large part of my role was managing SCE applications, because we had so many. After I joined, the company hired two additional staff. Over the past year and a half, however, hiring has plateaued and some layoffs occurred.”

Additionally, one respondent noted that maintaining a deliberately small workforce helped their firm remain flexible amid funding and demand uncertainty.

Another factor influencing hiring decisions was CRLD project timelines, which respondents described as often long and uncertain due to variability in application review timelines and, sometimes, multiple rounds of design revisions and approvals. EVSPs reported difficulty planning their staffing levels because they often did not know when a project would be approved, making it challenging to time staff expansion due to the risk of over- or under-hiring.

Looking ahead, only a limited number of EVSPs identified potential future workforce needs, such as skilled electricians, engineers, or project managers, while most reported no immediate plans to expand staff due to ongoing market and funding uncertainty. Respondents generally indicated that they would not have difficulty finding qualified workers if needed.

Workforce Training and Skill Development

Respondents generally viewed the training as useful but identified gaps in ongoing education. EVSPs reported participating in a range of training activities, including SCE-required trade professional training and internal training related to CRLD projects, such as design and project management. Trade professionals noted that required SCE training was helpful for understanding program rules. However, several trade professionals also expressed a desire for more frequent updates or refresher training, especially when program requirements or processes changed.

“I joined one of the trainings, and I know my coworkers did as well. It’s been a while. It would have been helpful to have a refresher. Sometimes changes aren’t well communicated, and we only find out by receiving corrections.”

Lastly, some NSPs indicated that guidance on compliance, particularly regarding customer data reporting requirements, would be beneficial in the future.

Program Strengths and Improvement Areas

Application process

EVSPs that were involved in supporting CRLD program applications reported mixed experiences with the process. Some described the application process as well designed and straightforward.

“The application process is much better than some other programs. I think SCE has a portal, which makes it a lot easier to track progress. The portal could use some improvements, but it is generally very helpful.”

Others, however, characterized the application process as time-consuming, citing several contributing factors. First, EVSPs reported that CRLD projects require greater design rigor and additional design reviews compared to non-CRLD projects. Second, respondents noted that both internal and external coordination was more burdensome, as SCE typically provided application status updates to a limited number of designated contacts. In practice, however, multiple staff within EVSP organizations, as well as site hosts or customer contacts, often needed access to these updates. As a result, EVSPs reported having to relay information internally and externally, prolonging the overall process.

“We often find ourselves forwarding messages or losing track of information because someone received a notification but didn’t fully read it or wasn’t sure who it needed to be sent to.”

Interactions with SCE

EVSP experiences with SCE interactions differed primarily based on the presence of a designated point of contact. EVSPs with an assigned contact generally characterized SCE as responsive, noting that the contact facilitated timely answers to questions, clarification of program, technical, and data reporting requirements, and resolution of issues as they arose. In these cases, EVSPs typically communicated through email and scheduled meetings and described this communication as timely and effective.

“Our main resource is our trade professional representative. She was appointed to assist us as a facilitator, and that has been really helpful. She communicates with the program manager if we have eligibility questions, or if applications haven’t been paid yet and we’ve submitted everything.”

“Having a real person to contact early on was critical. It was never unclear how to reach them. We’ve worked with utility programs in other states where, even after years, it’s still unclear who actually manages the program, and you just get passed around.”

In contrast, EVSPs without a designated SCE contact reported inconsistent or delayed communication and described having to independently search for information or clarity on program requirements. These dynamics added to administrative burden and uncertainty during project development.

“After two years of CRLD involvement, our assigned contact was gone and no one replaced him. We stopped getting any leads from the program. All contact was gone.”

One interview participant reported that SCE was highly responsive prior to and during installation; however, communication declined once post-installation issues arose. The EVSP noted that clearer expectations around post-installation communication should have been established upfront.

Site Host Interactions

EVSPs reported positive interactions with site hosts and played an active role in supporting pricing decisions. Most respondents described cooperative relationships with site hosts and reported high satisfaction with these interactions. EVSPs frequently played an advisory role in helping site hosts establish pricing structures for charging services. This guidance often included educating site hosts on appropriate charging rates through local and regional market comparisons, such as reviewing utility electricity rates by ZIP code and distinguishing between peak and off-peak pricing. Several EVSPs

also reported using internal software tools to support pricing discussions. These tools typically assessed site characteristics (e.g., multifamily vs. commercial use), compared pricing against regional averages for similar site types, and identified pricing that appeared either below market norms or unusually high. Ultimately, however, site hosts made final pricing decisions. EVSPs supported a range of payment methods, including mobile apps, QR codes, credit cards, kiosks, and RFID systems. In many cases, EVSPs managed payment processing on behalf of site hosts and subsequently remitted charging revenue to hosts, most commonly on a quarterly basis.

Two EVSPs that we interviewed noted that, in addition to ongoing communication with site hosts, they operated call centers that are always open to support drivers with charger use, mobile app navigation, and reporting of charger issues.

Overall Satisfaction and Opportunities for Improvement

EVSPs expressed mixed satisfaction with the CRLD program, citing strong program design and early outreach alongside challenges related to funding continuity, timelines, and coordination with program partners.

Respondents spoke positively about the program's overall design and outreach, noting that SCE's marketing efforts were effective in generating early interest and participation. EVSPs valued the program as an option that enabled a wide range of customer segments to access EV charging services that might otherwise be cost-prohibitive.

"We are very satisfied with SCE and the CRLD program. We've worked with other programs where requirements are extreme, and the process is much more difficult."

At the same time, respondents raised concerns about continuity of funding for public charging infrastructure and broader EV market uncertainty led by a change in federal policy. Several EVSPs noted that strong early demand led to waitlists as available funding became constrained. Some expressed frustration that funding was not extended more aggressively, particularly given customer interest and project momentum, and acknowledged that the issue was due to broader market uncertainty rather than SCE's actions. One EVSP noted that learning about depleted rebate funds created frustration for both customers and service providers.

"We spent time educating customers and helping them apply, only to be told later that rebate money was gone."

Respondents also highlighted that limited upfront visibility in the expected project timelines discouraged customers and, in some cases, resulted in projects being abandoned before installation.

"We've lost some customers because they were discouraged early in the process—if it takes that long just to get approved, how long will it take to do the install?"

Respondents noted that clearer upfront expectations around typical timelines, along with timely communication explaining why schedules change, would help manage customer confidence and planning. As one EVSP explained, delays followed by sudden deadline pressure contributed to customer frustration:

"You can't make people wait a year or a year and a half and then suddenly rush them to meet the timeline. You can't put everyone on hold and then tell them to hurry up."

Experiences with SCE’s data aggregator Energetics were mixed. Some NSPs described Energetics as responsive, particularly when addressing data issues. Others, however, reported inefficiencies stemming from overlapping data requests and delays in receiving critical project information. One respondent described having to work with multiple contacts who did not appear aligned:

“I had five or six different contacts at Energetics, and they don’t really seem to be working with each other at all. I kept getting asked for the same thing over and over again.”

One trade professional reported more significant negative experiences related to program communication, particularly when program administrators did not proactively communicate changes to approved product status. These lapses led to delays, additional costs, and rework, contributing to frustration and reduced confidence in program administration.

These findings suggest that, while EVSPs recognize the value of the CRLD program and its role in expanding access to EV charging, challenges related to EV market uncertainty, communication consistency, and coordination across SCE and program partners affected overall satisfaction. Addressing these issues through clearer advance notice of program changes, improved coordination among administrators, and greater transparency around timelines could strengthen EVSP experiences moving forward.

5. Market Characterization

As part of this evaluation, market characterization research was conducted to examine EV adoption factors relating to the “EV adoption at service area level” SB 350 reporting metric. This included a geographic analysis to map the recent evolution of EV prevalence and public charging availability, illustrating relationships between EV adoption, public charging availability, and key customer segments. The evaluation team also conducted a landscape analysis based on available literature, secondary data sources, and policy documentation to highlight broader market developments and trends, and to help contextualize the geographic analysis.

To inform geographic comparisons, several publicly-available secondary data sources were assembled that reflect historical and current information on EV adoption, publicly-available charging stations, census-based demographics, and areas designated as DACs, in addition to SCE CRLD program tracking data. These data sources are briefly summarized in Table 42.

Table 42. Geographic Analysis Data Sources

Metric	Source
Historical and Current EV Adoption ^a	California DMV EV registrations as a percentage of total light duty vehicles, as of December 2020 (prior to CRLD) and December 31, 2024 (latest available) by zip code.
Historical and Current Public Charging Sites ^b	Annual U.S. Department of Energy data inclusive of all publicly-accessible charging locations as of December 2020 (prior to CRLD) and January 2026, including counts of charging ports by charger type at each location, as well as partially populated information on location type.
Active CRLD Sites ^c	SCE CRLD program tracking data indicating active CRLD charging site locations as of December 2025.
Disadvantaged Communities ^d	CalEnviroScreen 4.0 indication of areas disproportionately burdened by pollution or with median incomes under 60% of statewide levels or tribal lands, by census tract.
Low-to-Moderate-Income Populations ^e	U.S. Department of Housing and Urban Development data reflecting incidence of households below 80% of AMI from 2016-2020 American Community Survey data, by census block group.
Multifamily Housing Prevalence ^f	ESRI data accessed via ArcGIS Online reflecting the incidence of multifamily housing based on 2020-2024 American Community Survey data, by census tract.

^a Throughout this report, EV adoption refers to the incidence of registered EVs as a percentage of total light duty vehicles. We calculated the percentage of total light-duty vehicles in each zip code that are battery electric for each yearly dataset from the California DMV: 2020, 2021, 2022, 2023, and 2024. CA DMV. <https://data.ca.gov/organization/california-department-of-motor-vehicleshttps://data.ca.gov/dataset/vehicle-fuel-type-count-by-zip-code/>.

^b U.S. Department of Energy public charging data is inclusive of a subset of active CRLD charging sites installed in public access locations. DOE. Alternative Fuels Data Center. <https://afdc.energy.gov/stations>.

^c For the purposes of this study, the term “active” is used to refer to completed, energized, and operational sites. SCE tracking data uses the term “active” to describe active applications rather than sites.

^d CalEnviroScreen 4.0 is the screening tool recognized by the 2022 CPUC Environmental & Social Justice Action Plan Version 2.0 to identify DACs, which include California communities disproportionately burdened by multiple sources of pollution, designated tribal lands, or areas with median incomes below 60% of statewide levels. CPUC. Environmental & Social Justice Action Plan Version 2.0. April 2022. Office of Environmental Health Hazard Assessment, CalEnviroScreen 4.0 (California Environmental Protection Agency, 2021), <https://experience.arcgis.com/experience/>.

^e U.S. Department of Housing and Urban Development, U.S. Census Bureau. https://services.arcgis.com/VTyQ9soqVukalIT/arcgis/rest/services/LOW_MOD_INCOME_BY_BG/FeatureServer.

^f U.S. Census Bureau's American Community Survey (ACS) 2020-2024 5-year estimates. ACS Housing Units in Structure (Latest). <https://www.arcgis.com/home/item.html?id=47d3e4fad7a64c5ca84ec2ab950099ca>.

5.1 Geographic Analysis of Public Charging Availability

In the five years since the launch of SCE's CRLD Program, both EV adoption levels and public charging availability have grown substantially. As part of the geographic analysis, historical public charging availability relative to EV adoption was examined. Between 2020 and 2025, EV registrations increased by 305% across SCE's service territory, while the prevalence of public charging stations grew by 269%. However, EV adoption and public charging incidence are not closely aligned by zip code (the most granular level at which both metrics are available). As of December 2025, the 424 currently active CRLD charging sites account for 8% of all public charging in SCE's service territory and 32% of newly-added public charging since 2020. Notably, another 1,064 CRLD charging sites are still in development. Figure 31 compares public charging and EV adoption levels in 2020 and current across SCE's service territory.

Figure 31. EV Adoption and Public Charging Comparison, 2020 and Current

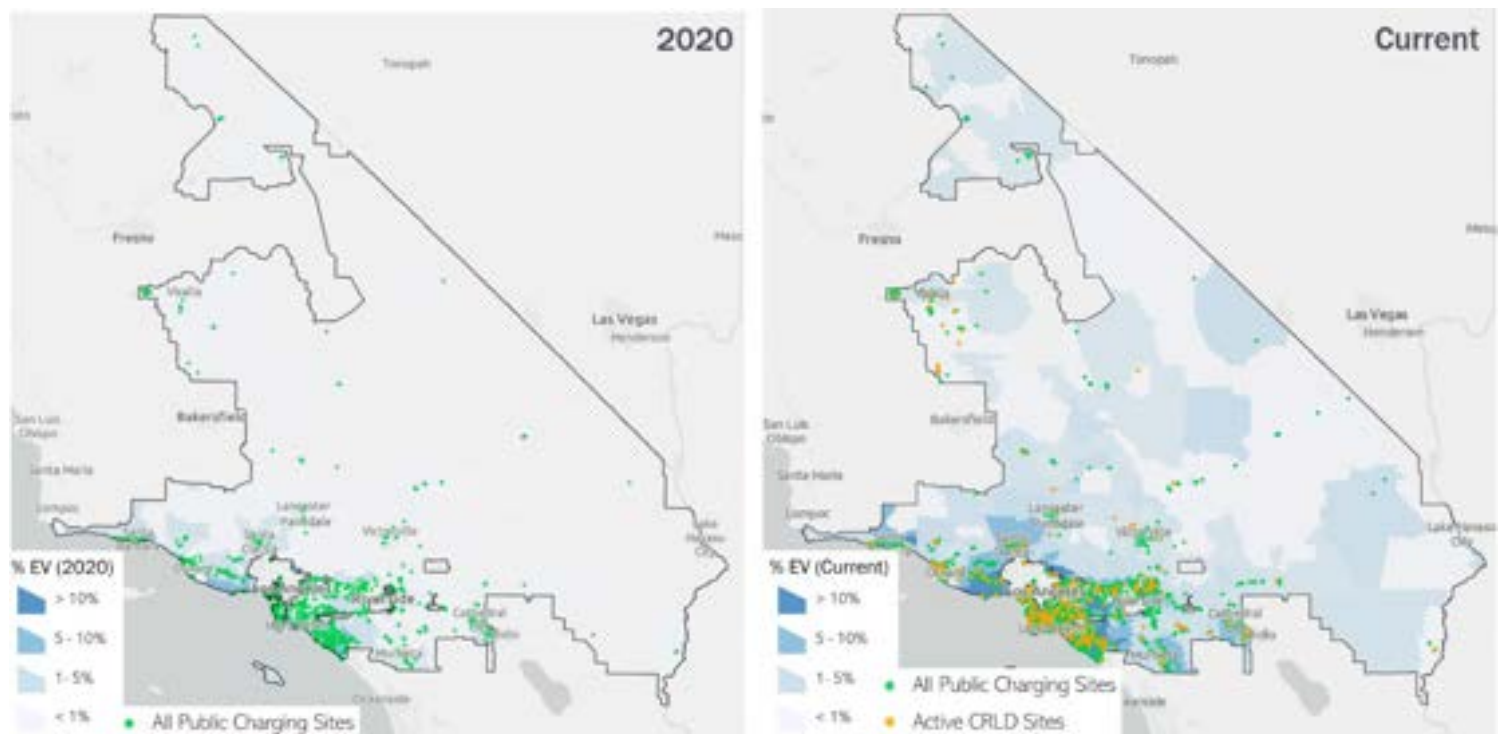
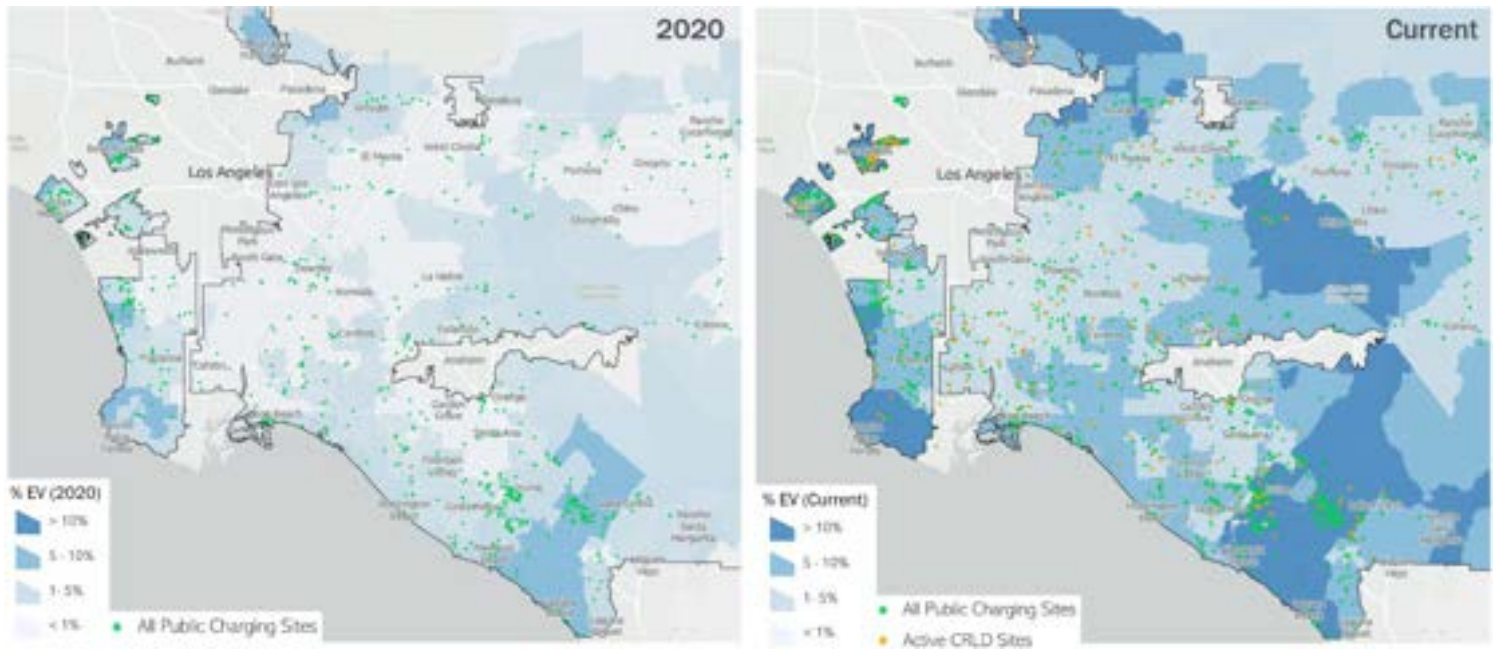


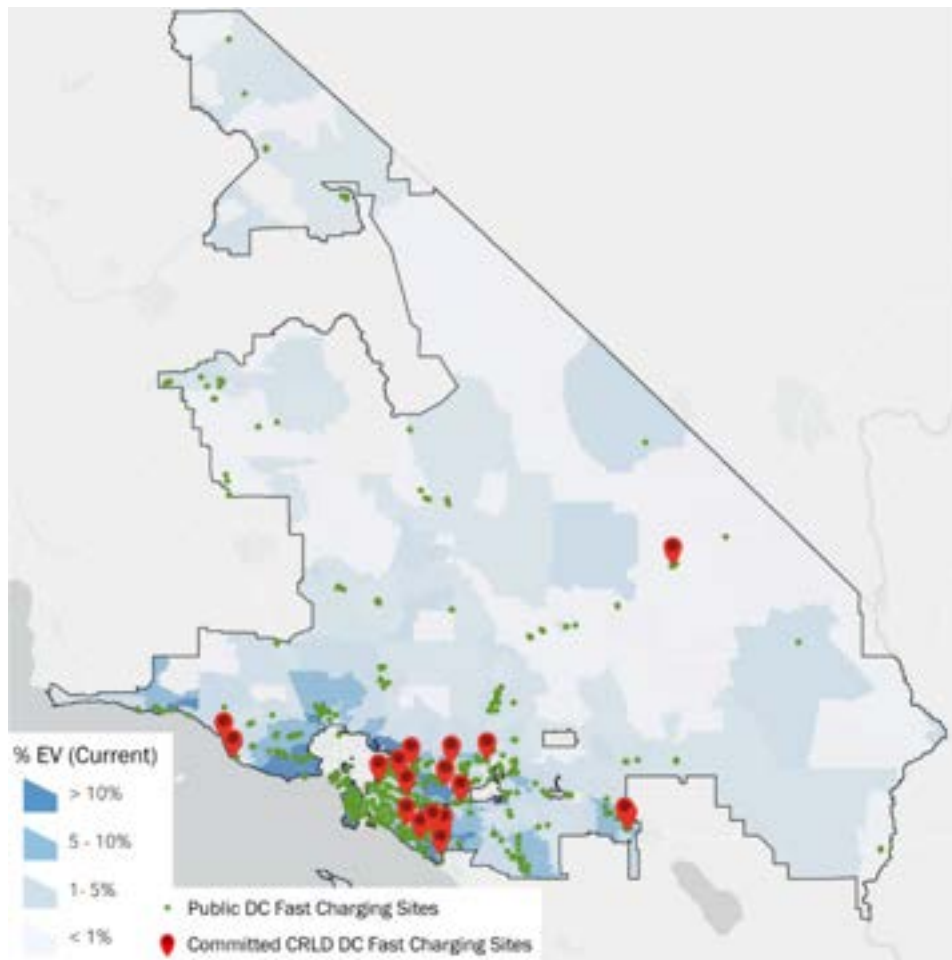
Figure 32 provides additional granularity around the more population-dense coastal areas.

Figure 32. Urban Snapshot: EV Adoption and Public Charging, 2020 and Current



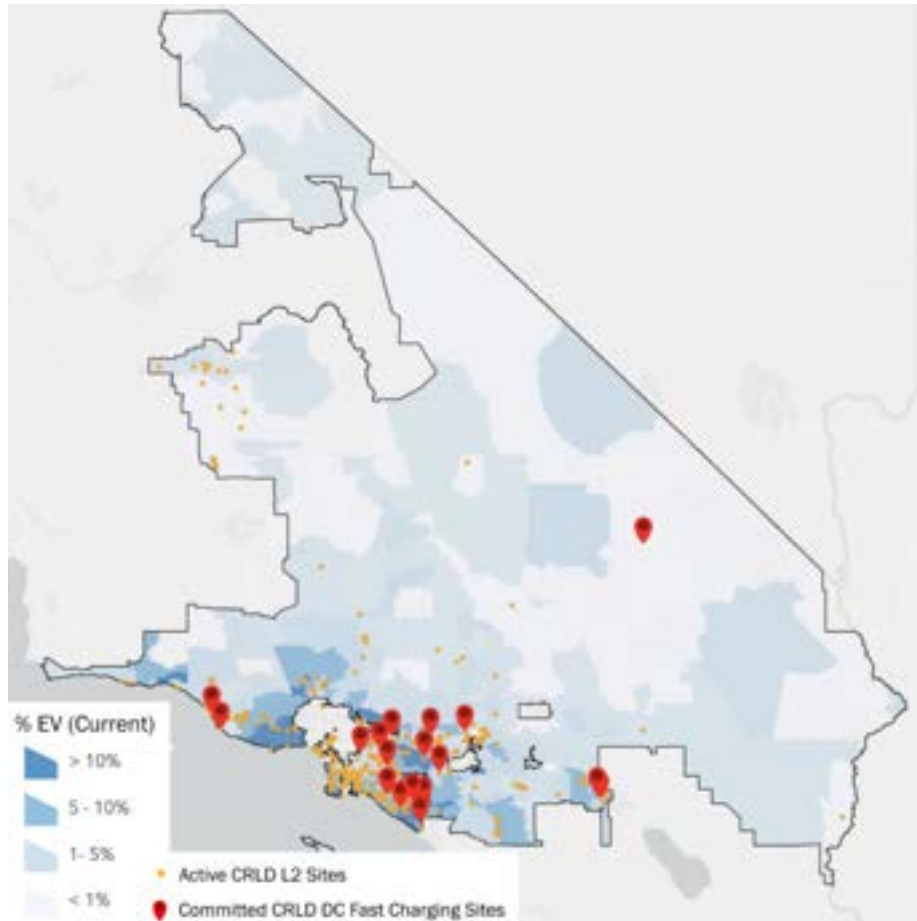
As of 2025, the public availability of newer and more costly DCFC charging sites generally lags behind that of L2 public charging, and the first CRLD-incentivized DCFC sites are still preparing to come online. The CRLD Program first began accepting DCFC applications in April 2024. Among the 5,380 public charging sites in SCE’s service territory, 791 (15%) have at least one approved DCFC port. Across sites with DCFC public charging where location data is available, 44% are installed at retail locations (e.g., shopping centers, restaurants, or grocery stores), 24% are found in public or shared lots, and 11% are at gas stations or convenience stores. The 20 committed DCFC CRLD sites are located at small or large retail centers (n=10), government facilities (n=4), office buildings (n=3), parks (n=2), and public parking lots (n=1). Figure 33 presents the locations of all publicly-available DCFC sites along with the committed CRLD DCFC sites.

Figure 33. Public DCFC Charging and CRLD-Funded DCFC Charging



None of the 20 committed CRLD-funded DCFC charging sites are co-located with active CRLD L2 chargers (i.e., none are installed at the same address). In accordance with Resolution E-5290, OP5, Requirement 5, it was assessed whether the CRLD Program is effectively avoiding co-location of CRLD DCFC and L2 charging sites and confirmed this to be the case thus far. Figure 34 shows the prevalence of active L2 sites incentivized through CRLD relative to committed DCFC sites.

Figure 34. CRLD-Funded L2 and DCFC Charging



SCE continues to prioritize development of CRLD charging sites in DACs and complete installations in DACs at a higher rate than other publicly-available charging. As of December 2025, 39% of active CRLD sites are located in DACs, compared with 21% of all publicly-available charging sites across SCE’s service territory (1,115 of 5,380). The incidence of active CRLD sites located in DACs remained consistent from 2024 to 2025, and SCE ultimately aims to complete 50% of all CRLD charging site installations in DAC areas. Figure 35 shows public charging and EV adoption levels relative to DAC areas throughout SCE’s service territory in 2020 relative to latest available, and Figure 36 provides additional granularity around the more population-dense coastal areas.

Figure 35. DACs, EV Adoption, and Public Charging, 2020 and Current

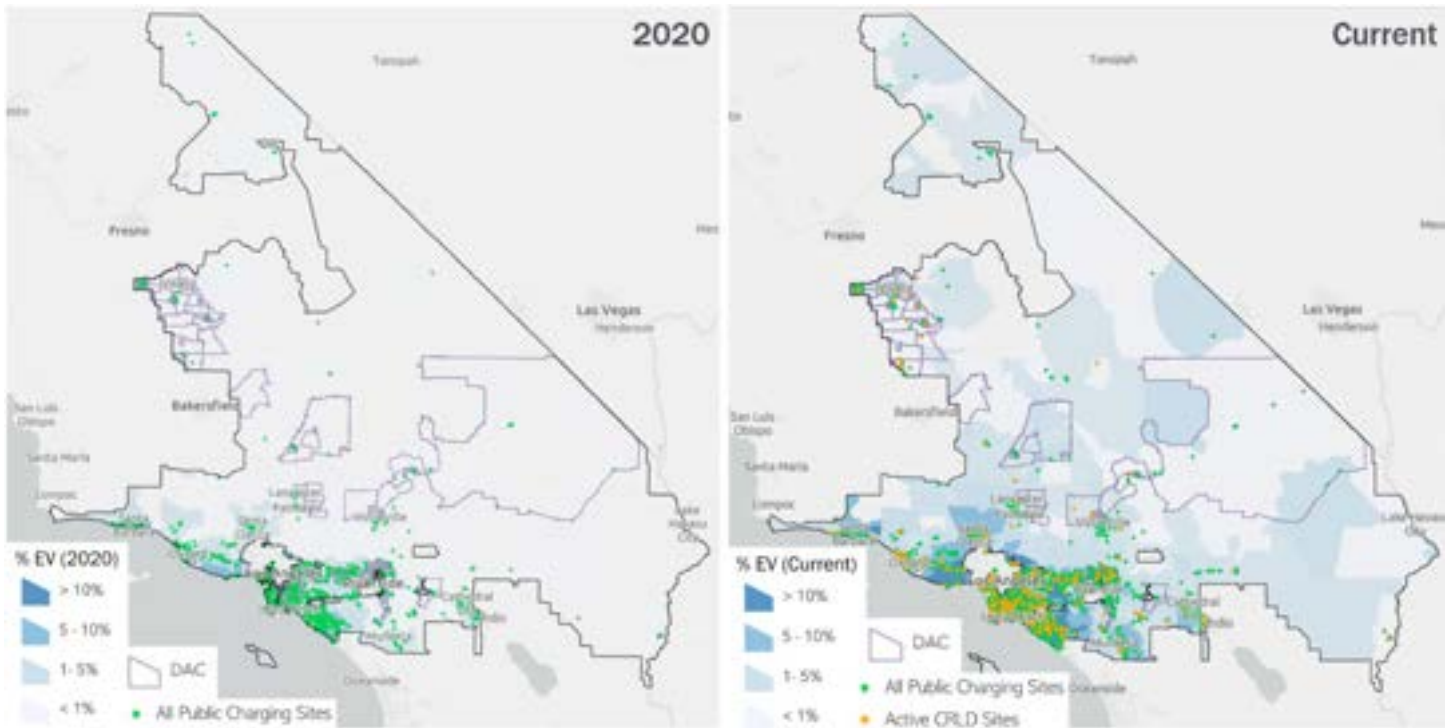
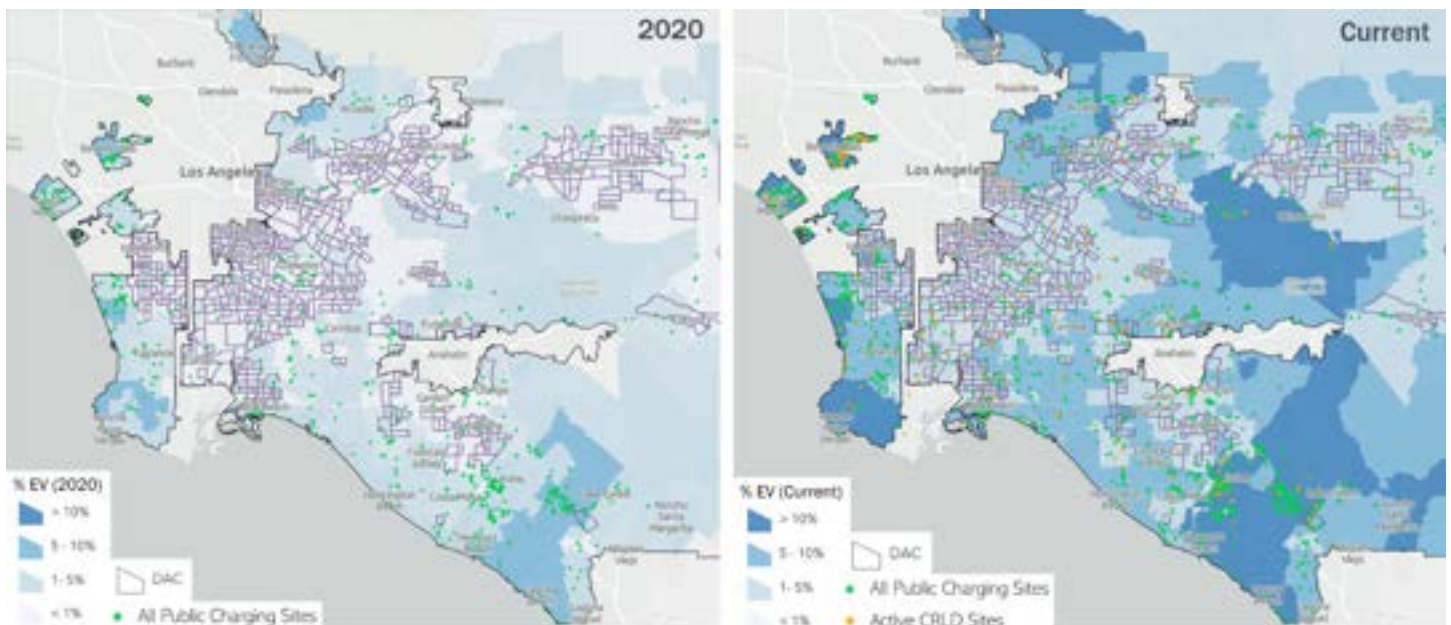


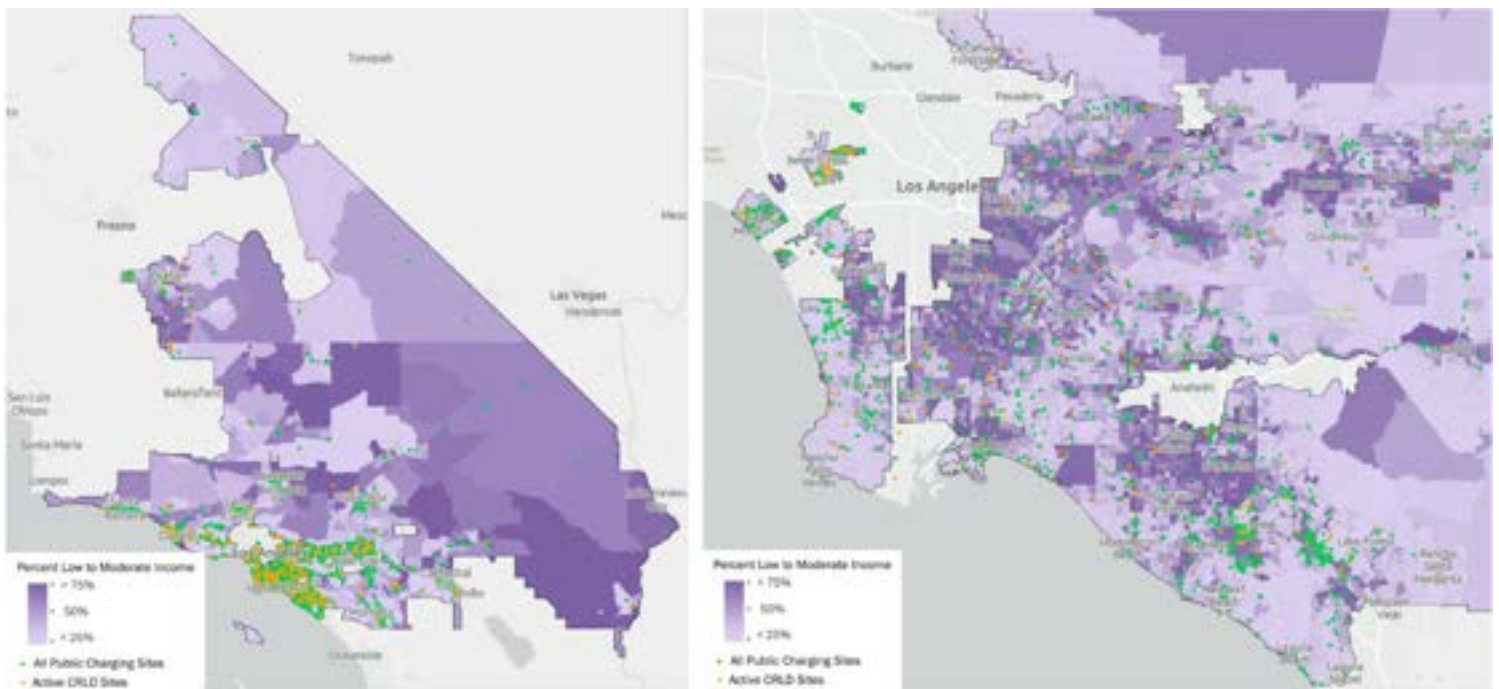
Figure 36. Urban Snapshot: DACs, EV Adoption, and Public Charging, 2020 and Current



The broader prevalence of public charging in DACs also increased substantially from 2020. By the end of 2025, 12% of DACs in SCE service territory had at least three public charging stations, compared to less than 3% in 2020. Because the DAC definition accounts for a combination of air quality, median income, and tribal land designations, some are notably more affluent and such areas around Long Beach and Santa Monica have upwards of 60 public charging sites in a single zip code.

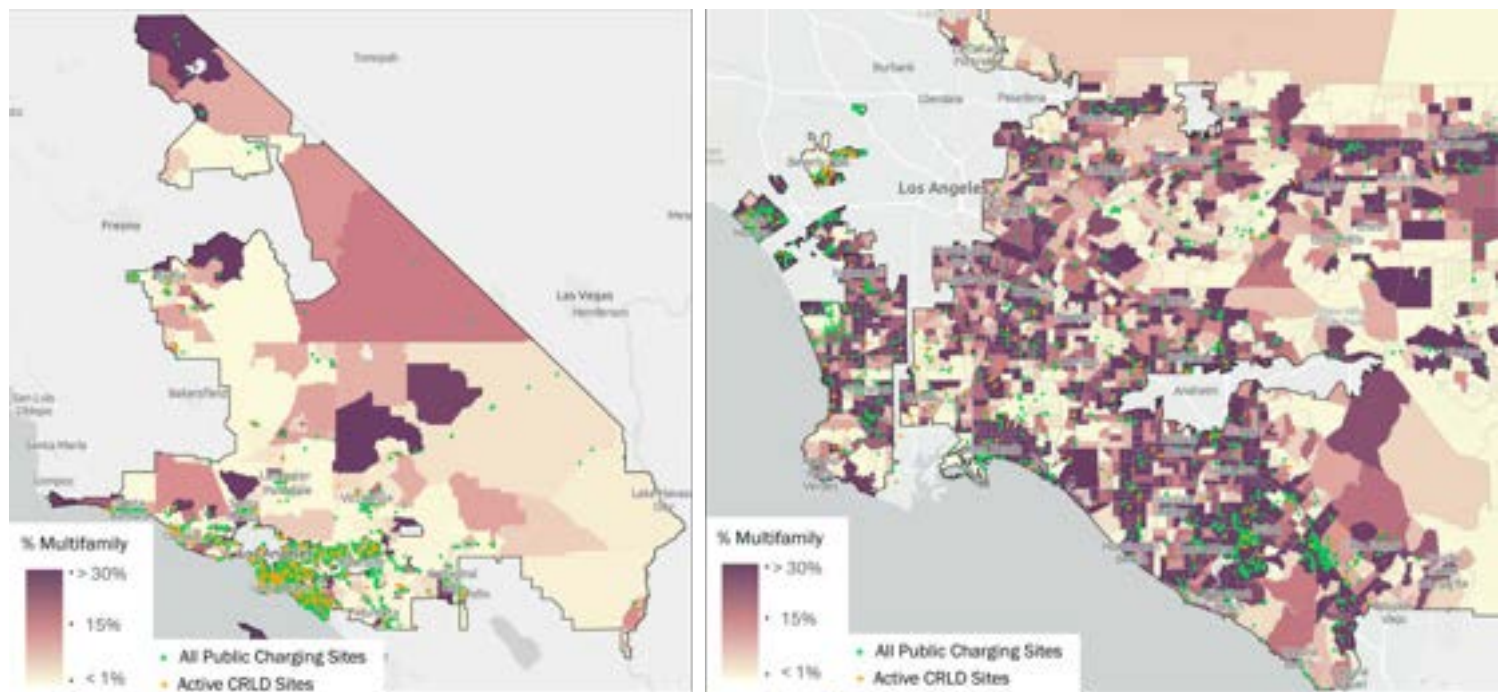
CRLD charging sites tend to be more concentrated in lower-income areas than other publicly-available charging sites, and public charging in general tends to be most prevalent in more affluent, coastal communities. Fifty-two percent of CRLD charging sites are located in block groups with above-average incidences of low-to-moderate income customers. By comparison, 42% of all public charging sites of CRLD charging sites are located in these lower-income areas. Many census tracts in the eastern portion of the state have higher-than-average incidences of low-to-moderate income customers, and those same areas tend to have lower levels of EV adoption than the urban and coastal portions of the territory. Figure 37 shows publicly-available and CRLD charging stations in relation to the percentage of the population living below 80% of AMI.

Figure 37. Low-to-Moderate Income Levels and Public Charging



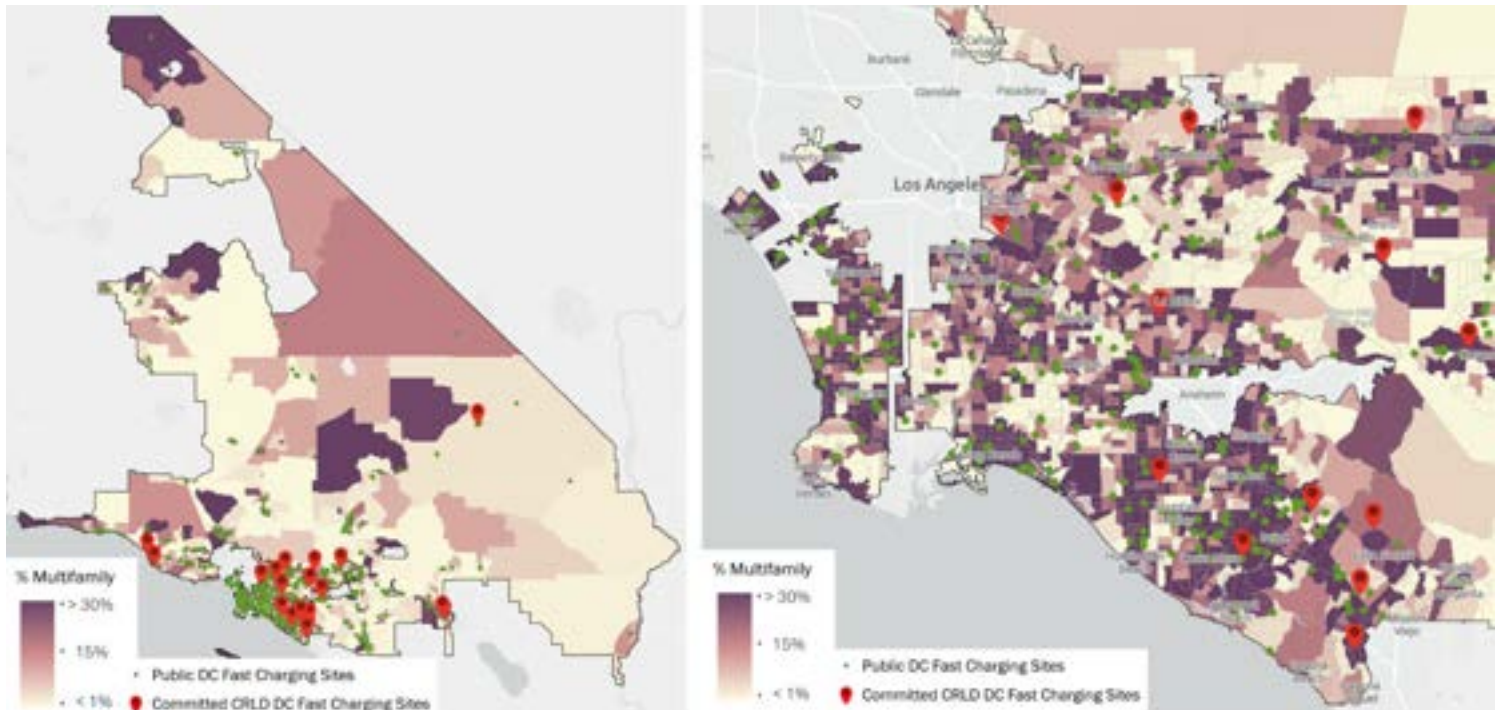
SCE prioritizes installation of CRLD sites at or adjacent to MUD residences where the addition of home charging can be more challenging than for single-family residents, and many CRLD charging sites are located in MUD parking facilities and areas with higher-than-average incidences of MUD housing. Among active CRLD charging sites, 42% are located on premises of MUD housing properties, and 69% are in areas where at least 15% of the population lives in MUDs. By comparison, 60% of all public charging sites are located in these same areas with relatively high incidences of MUD housing. Generally speaking, public charging tends to be more concentrated in urban areas which often have higher prevalence of MUD housing. Figure 38 shows the distribution of publicly-accessible and CRLD charging sites in relation to the prevalence of MUD housing.

Figure 38. MUD Housing Presence and Public Charging



Public charging stations with DCFC ports tend to be particularly concentrated in more urban areas with more MUD residences. Sixty-seven percent of all publicly-accessible DC fast charging stations are located in areas where at least 15% of the population lives in MUDs. Of the 20 committed CRLD DC fast charging sites, 70% are located in areas with greater than 15% MUD housing. Figure 39 displays the locations of public DC fast chargers to committed CRLD DC fast charging sites, relative to MUD housing prevalence.

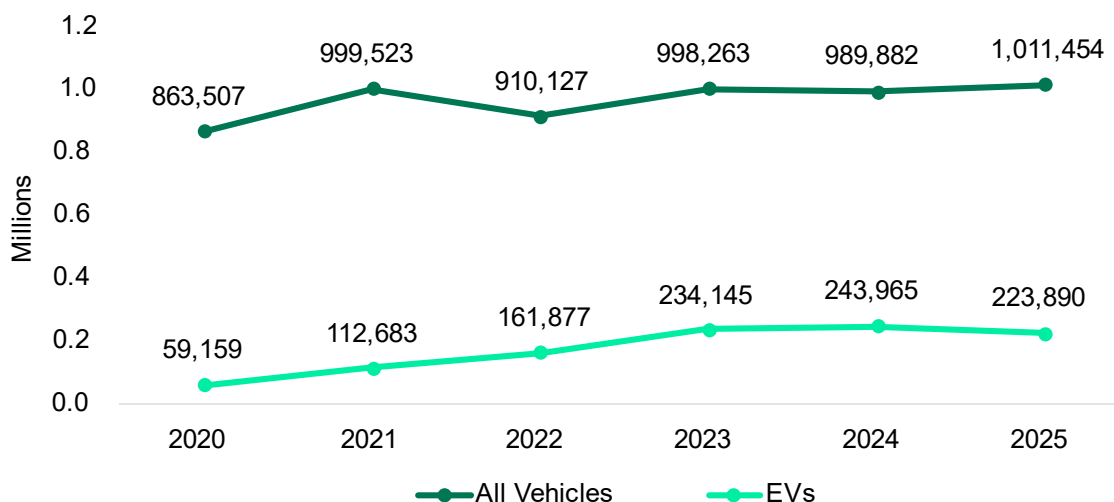
Figure 39. MUD Housing Presence and Public DC Fast Charging



5.2 EV Market Landscape Overview

Over the past six years, EV light duty vehicle sales increased dramatically from under 60,000 vehicles in 2020 to over 220,000 in 2025 (a 278% increase). When SCE's CRLD Program first launched in 2020, EVs made up 7% of all light duty vehicle sales, whereas in 2025, they accounted for 22% of all light duty vehicles sales. Notably, EV sales declined in 2025 from the year prior, when they accounted for 25% of total light duty vehicle sales. Figure 40 summarizes annual EV sales relative to total light duty sales from 2020 to 2025.

Figure 40. Annual Light Duty Vehicle Sales in SCE Service Territory



Note: Sales figures are representative of 15 counties served by SCE: Fresno, Imperial, Inyo, Kern, Kings, Los Angeles, Madera, Mono, Orange, Riverside, San Bernardino, Santa Barbara, Tuolumne, Tulare, and Ventura.

5.2.1 Federal Policy

In July 2025, the One, Big, Beautiful Bill Act (OB BB) shortened the lifetime of existing EV and infrastructure incentives, including those funded through the 2022 Inflation Reduction Act (IRA) and the 2021 Infrastructure Investment and Jobs Act (IIJA, also known as the Bipartisan Infrastructure Law).⁵³ The IRA established a range of incentives and funding opportunities for clean transportation, including a tax credit for consumers who purchase electric vehicles. Eligible buyers could receive a tax credit of up to \$7,500 for new qualified EVs or fuel cell electric vehicles and up to \$4,000 for pre-owned EVs.⁵⁴ The OB BB effectively discontinued these new and used clean vehicles credits as of October 1, 2025.⁵⁵

This spurred a brief EV sales spike in Q3 of 2025, during which EVs made up 29% of California vehicle sales as consumers took advantage of the final few months of federal credits.⁵⁶

⁵³ Internal Revenue Service (IRS), One, Big, Beautiful Bill provisions. July 4, 2025. <https://www.irs.gov/newsroom/one-big-beautiful-bill-provisions>.

⁵⁴ U.S. Department of Energy, Federal Tax Credits for Plug-in Electric and Fuel Cell Electric Vehicles Purchased in 2023 or After, available at: <https://fueleconomy.gov/feg/tax2023.shtml>.

⁵⁵ U.S. Department of Transportation, Federal Funding Programs. <https://www.transportation.gov/rural/ev/toolkit/ev-infrastructure-funding-and-financing/federal-funding-programs>.

⁵⁶ Governor Gavin Newsom, Record-breaking quarter: California reaches historic high in ZEV sales. October 13, 2025. <https://www.gov.ca.gov/2025/10/13/record-breaking-quarter-california-reaches-historic-high-in-zev-sales/>.

The OBBA also rolled back federal support for EV infrastructure, including the Alternative Fuel Infrastructure Tax Credit, which provided tax credits for low- to moderate-income consumers installing EV charging infrastructure.⁵⁷ The Alternative Fuel Infrastructure Tax Credit was originally slated to remain available through 2032, but will now be sunsetted after June of 2026.⁵⁸

5.2.2 California Policy and Programs

In contrast to recent shifts in federal policy priorities, California policy continues to actively promote EV adoption and charging station development. On June 12, 2025, Governor Gavin Newsom signed Executive Order N-27-25, reaffirming California's commitment to advancing clean transportation and cutting air pollution.⁵⁹ This executive order built off several existing policies, including the Clean Energy and Pollution Reduction Act (SB 350), Executive Order N-79-20, and Assembly Bill 1279.^{60,61,62}

Since its enactment in 2015, SB 350 mandated that California's electric IOUs incorporate transportation electrification into long-term planning, serving to initiate programs such as SCE's CRLD. The act encouraged the electric IOUs to support EV infrastructure development, contributing to the state's GHG emission reduction goals and prioritizing improvements in DACs. In 2020, Executive Order N-79-20, also known as the Zero Emission Vehicle Executive Order, established a target of 100% zero-emissions in-state sales of new passenger cars and trucks by 2035 and set similar goals for medium-duty, heavy-duty, and off-road vehicles and equipment operations.⁶³ Lastly, Assembly Bill 1279, or the California Climate Crisis Act, set the state-wide goal for carbon neutrality by 2045, and net negative emissions thereafter.⁶⁴

In concert with other California policy legislation, the CPUC first approved the Transportation Electrification Framework (TEF) in November 2022 via Decision 22-11-040, establishing a series of funding structures for transportation electrification investments.

⁵⁷ U.S. Department of Transportation. Federal Funding Programs. <https://www.transportation.gov/rural/ev/toolkit/ev-infrastructure-funding-and-financing/federal-funding-programs>.

⁵⁸ U.S. Department of Energy, Alternative Fuel Infrastructure Tax Credit. <https://afdc.energy.gov/laws/10513>.

⁵⁹ Governor Gavin Newsom., Executive Department: State of California. June 12, 2025. [CRA-Response-EO-N-27-25 -bl-formatted-GGN-Signed-6-11-954pmFinal.pdf](https://www.sos.ca.gov/press-releases/2025/06/12/Executive-Order-N-27-25-Bl-Formatted-GGN-Signed-6-11-954pmFinal.pdf).

⁶⁰ CEC. Clean Energy and Pollution Reduction Act (SB 350). <https://www.energy.ca.gov/rules-and-regulations/energy-suppliers-reporting/clean-energy-and-pollution-reduction-act-sb-350>.

⁶¹ Executive Order N-79-20 (Sept. 23, 2020), available at <https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf>.

⁶² Assembly Bill 1279, The California Climate Crisis Act. September 16, 2022. https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB1279.

⁶³ CARB, Governor Newsom's Zero-Emission by 2035 Executive Order (N-79-20) Fact Sheet, available at <https://ww2.arb.ca.gov/resources/fact-sheets/governor-newsoms-zero-emission-2035-executive-order-n-79-20?keywords=2025>.

⁶⁴ Assembly Bill 1279, The California Climate Crisis Act. September 16, 2022. https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB1279.

In addition to introducing Funding Cycle 1 (FC1), representing up to \$1 billion dollars to support transportation electrification efforts beginning in 2025, it also introduced a grace period extending the life of Funding Cycle Zero (FC0) programs from the end of 2024 to the end of 2026. In December 2023, the CPUC initiated Rulemaking (R.) 23-12-008, suspending the ratepayer-funded support of TEF initiatives and directly impacting SCE efforts and CRLD funding, leading SCE to file formal comments on the plan in July of 2024 advocating for a series of changes, including the continued suspension of the TE Rebate Program, clarification on the extended grace period for existing FC0 programs, and continuation of the Technical Assistance (TA) Program.^{65,66}

In October 2025, the CPUC proposed a new decision under R.23-12-008, outlining new administrative requirements and providing clarifications on programs adopted through Decision 22-11-040.⁶⁷ Notably, this proposed decision suggested delinking the TA Program from the paused FC1 Behind-the-Meter Rebate Program, allowing the TA Program to continue operating. Additionally, the CPUC declined to extend the authorization of FC0 programs past their deadline of December 31, 2026.

As part of California's commitment to advancing clean transportation, the following programs and funding structures continue to operate:

- **The Clean Transportation Program:** Administered by the California Energy Commission (CEC), this program funds EV charging and hydrogen refueling stations across the state based on a four-year \$1.4 billion investment plan approved by the CEC in December of 2024.⁶⁸
- **Low Carbon Fuel Standard Funds:** A state program designed to reduce the carbon intensity of fuels by creating a revenue stream for clean transportation projects through credits generated by low-carbon fuel providers.⁶⁹
- **Electric Program Investment Charge (EPIC):** The CPUC established the EPIC Fund to support public interest investments in clean energy research.⁷⁰ SCE has administered multiple projects through this fund, including a DC Fast Charging Demonstration, a Vehicle-to-Grid (V2G) Integration project, and Distributed Plug-In EV Charging Resources project.⁷¹
- **Driving Clean Assistance Program (DCAP) and Clean Cars 4 All:** CARB's DCAP and Clean Cars 4 All offer EV incentives and financing options to help lower-income consumers replace non-EVs with newer, cleaner transportation.⁷² EV buyers are also eligible for home charger incentives or prepaid EV charge cards, if home charger installation is not an option.
- **ChargePerks:** The CEC partners with WeaveGrid, a charging optimization vendor, to offer this EV charging optimization program, which incentivizes customers to charge during off-peak periods helping to support grid resiliency.⁷³

⁶⁵ Order Instituting Rulemaking Regarding Transportation Electrification Policy and Infrastructure and Closing Rulemaking 18-12-006.

⁶⁶ SCE Reply Comments on the Administrative Law Judge's Ruling Initiating Track 1, R.23-12-008, July 18, 2024.

⁶⁷ CPUC, Proposed Decision on R.23-12-008. October 27, 2025, available at <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M588/K929/588929933.PDF>.

⁶⁸ CEC, December 11, 2024. <https://www.energy.ca.gov/news/2024-12/cec-approves-14-billion-plan-expand-zero-emission-transportation-infrastructure>.

⁶⁹ CARB. Low Carbon Fuel Standard. <https://ww2.arb.ca.gov/our-work/programs/low-carbon-fuel-standard>.

⁷⁰ CPUC, Electric Program Investments Charge Program-EPIC. [Electric Program Investment Charge Program - EPIC | California Energy Commission](https://www.cpuc.ca.gov/ElectricProgramInvestmentsChargeProgram-EPIC).

⁷¹ EPIC Database. Available in: <https://database.epicpartnership.org/projects?programAdmin=1>.

⁷² [Clean Cars 4 All | CARB](https://www.carb.ca.gov/CleanCars4All).

⁷³ <https://www.weavegrid.com/chargeperks>.

- **Clean Miles Standard:** Transportation network companies, including ride-hailing services like Uber and Lyft, must meet steadily increasing annual targets from 2023 to 2030, with an end goal of 90% electric vehicle miles traveled and zero greenhouse gas emissions.⁷⁴ Uber has since launched its Go Electric incentive, which provides drivers in California, Colorado, Massachusetts, and New York \$4,000 for switching to an EV.⁷⁵

In addition to the existing California program offerings, several new transportation electrification efforts were introduced in late 2025 and early 2026. These include the January 2026 announcement of a point-of-sale incentive, which if passed would make \$200 million available for first-time EV buyers.⁷⁶ The CEC also introduced its Fast Charge California Project in August 2025, which dedicates \$55 million to incentives for installation of public and business-owned DCFC charging sites.⁷⁷

5.3 EV Adoption Drivers and Barriers

Primary barriers to EV adoption include upfront costs and perceived limitations of public charging availability and reliability. Most recently, a 2026 study of automotive consumers found that 40% of surveyed U.S. drivers cited upfront cost/price as their largest concern with adopting EVs.⁷⁸ Multiple other recent studies point to non-EV drivers' skepticism of charger availability as a key barrier to EV adoption.^{79,80} A survey conducted by the Pew Research Center found that over half of surveyed drivers were "not too confident or not at all confident" that the U.S. will build out enough charging infrastructure for large-scale EV adoption.⁸¹ In addition to customers' lack of confidence in charging availability, recent research also suggests customers frequently encounter issues with public charging payment and hardware.^{82,83} This lack of reliability impacts customer satisfaction and may even contribute to drivers abandoning their EVs.

One recent study found that EV drivers who subsequently reverted to internal combustion engine vehicles often did so at least in part due to "dissatisfaction with the convenience of charging."⁸⁴

Despite customer concerns around vehicle costs and charger availability and reliability, industry advancements are driving some lowering in EV costs while generally improving EV range. In 2025, lithium-ion battery prices hit a record-low of \$108/kWh and were expected to continue dropping in 2026, following a more than decade-long trend of decreasing battery

⁷⁴ CPUC, "Phase 1 Decision to Implement the Clean Miles Standard Program," . March 14, 2024. <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/consumer-protection-and-enforcement-division/documents/tlab/clean-miles-standard/d2403001.pdf>.

⁷⁵ Uber, Get \$4,000 for switching to an EV through Uber's Go Electric incentive. <https://www.uber.com/us/en/drive/services/electric/zero-emissions-incentive/>.

⁷⁶ Section 43215 of the Health and Safety Code. State of California. January 29, 2026. <https://trailerbill.dof.ca.gov/public/trailerBill/pdf/1367>. Governor Gavin Newsome. Executive Department: State of California. February 9, 2026. <https://www.gov.ca.gov/2026/02/09/what-theyre-saying-strong-support-for-governor-newsoms-200m-zev-program/>

⁷⁷ CEC. August 5, 2025. <https://www.energy.ca.gov/news/2025-08/california-opens-55-million-incentive-program-expand-public-electric-vehicle>.

⁷⁸ Deloitte, 2026 *Global Automotive Consumer Study*. January 2026. <https://www.deloitte.com/content/dam/assets-zone3/us/en/docs/industries/consumer/2026/2026-global-automotive-consumer-study-jan2026.pdf>.

⁷⁹ <https://energycentral.com/o/EPRI/understanding-barriers-and-challenges-greater-ev-adoption>.

⁸⁰ Bonnie Powell and Caley Johnson. NRL. August 2024. <https://www.nrel.gov/docs/fy24osti/89896.pdf>.

⁸¹ Alison Spencer, Stephanie Ross, and Alex Tyson. *How Americans view electric vehicles*. Pew Research Center. July 13, 2023. <https://www.pewresearch.org/short-reads/2023/07/13/how-americans-view-electric-vehicles/>.

⁸² *Ibid*.

⁸³ Jeff Bartlett and Jon Linkov. *The Most Common EV Charging Problems—and How to Avoid Them*. Consumer Reports. March 18, 2025. <https://www.consumerreports.org/cars/hybrids-evs/most-common-ev-charging-problems-and-how-to-avoid-them-a1108537217/>.

⁸⁴ Scott Hardman and Gil Tal. *Understanding Discontinuance Among California's Electric Vehicle Owners*. Nature Energy. April 26, 2021. <https://www.nature.com/articles/s41560-021-00814-9>.

prices.^{85,86} According to the Department of Energy, light-duty EV battery pack costs dropped by 90% from 2008 to 2023.⁸⁷ Additionally, International Council on Clean Transportation forecasts suggest short- to mid-range EVs will reach price parity with their gasoline counterparts by 2029.⁸⁸ Meanwhile, the median range for EVs increased from 259 miles per charge in 2020 to 283 miles per charge in 2024.⁸⁹ As of 2025, some widely-available production EVs boasted E.P.A.-rated electric ranges of over 500 miles.⁹⁰

Progress towards improved public charging reliability and charging port standardization should also serve to reassure customers and encourage EV adoption. A 2025 customer survey conducted by J.D. Powers found that customers' public charging experiences have improved somewhat in recent years, with EV drivers reporting a lower rate of failed public charging attempts in 2025 than in any of the prior four years.⁹¹ Additionally, North American Charging Standard (NACS) charging ports continue to gain traction and market penetration following Tesla's 2022 decision to make their proprietary charging port available to other companies.⁹² Many of the world's largest automakers, including Ford, General Motors, Stellantis, BMW, Hyundai, Nissan, Honda, Toyota, and Volkswagen now include NACS charging ports, granting vehicles access to Tesla's charging network.⁹³ The move among many EV manufacturers to the NACS highlights a shift toward unified standards that can enhance accessibility, convenience, and reliability for EV drivers.

⁸⁵ Colin McKerracher. *New Record Lows for Battery Prices*. BloombergNEF. December 19, 2025. <https://about.bnef.com/insights/clean-transport/new-record-lows-for-battery-prices/>.

⁸⁶ Goldman Sachs, Electric vehicle battery prices are expected to fall almost 50% by 2026. October 7, 2024. <https://www.goldmansachs.com/insights/articles/electric-vehicle-battery-prices-are-expected-to-fall-almost-50-percent-by-2025>.

⁸⁷ Department of Energy, *FOTW #1354, August 5, 2024: Electric Vehicle Battery Pack Costs for a Light-Duty Vehicle in 2023 Are 90% Lower than in 2008, according to DOE Estimates*. August 5, 2024. [https://www.energy.gov/eere/vehicles/articles/fotw-1354-august-5-2024-electric-vehicle-battery-pack-costs-light-duty#:~:text=The%202023%20estimate%20is%20\\$139.173](https://www.energy.gov/eere/vehicles/articles/fotw-1354-august-5-2024-electric-vehicle-battery-pack-costs-light-duty#:~:text=The%202023%20estimate%20is%20$139.173).

⁸⁸ Peter Sloweik et al. *Assessment of Light-Duty Electric Vehicle Costs and Consumer Benefits in the United States in the 2022-2035 Time Frame*. International Council on Clean Transportation. June 11, 2024. https://evs36.com/wp-content/uploads/finalpapers/FinalPaper_Slowik_Pete.pdf.

⁸⁹ <https://www.energy.gov/eere/vehicles/articles/fotw-1375-december-30-2024-median-ev-range-model-year-2024-reached-record.%5bthis> Electric Drive Transportation Association, "Median EV Range in Model Year 2024 Reached a Record High of 283 Miles per Charge," Electric Drive, December 30, 2024, <https://electricdrive.org/news/median-ev-range-model-year-2024-reached-record-high-283-miles-charge>.

⁹⁰ Kelley Blue Book, *Longest Range Electric Cars of 2025*. <https://www.kbb.com/electric-car/longest-range-electric-cars/2025/?msocid=22c060e27d2769211abb76167c9068e9>.

⁹¹ J.D. Power, *Fewer Failed Charging Attempts Signal Progress in EV Infrastructure*. August 15, 2025. <https://www.jdpower.com/sites/default/files/file/2025-08/202086%20U.S.%20EVX%20Public%20Charging.pdf>.

⁹² Tesla, *Opening the North American Charging System*. November 11, 2022. <https://www.tesla.com/blog/opening-north-american-charging-system>.

⁹³ Andrew Beckford, *The Great NACS Migration: Which Car Companies Are Switching to Tesla's Charging Port?* <https://www.motortrend.com/features/tesla-nacs-charging-port-automaker-compatibility>.

6. Detailed Findings, Successes, and Recommendations

This section summarizes detailed findings, highlights successes, and provides recommendations from the 2025 CRLD Program evaluation.

- **The CRLD Program is successfully advancing charging deployment in priority markets.** From program launch through the end of 2025, the CRLD Program facilitated the commitment of 23,357 EV charging ports in SCE's service territory, with deployment concentrated in multi-unit dwellings (MUDs) and disadvantaged communities (DACs). Nearly half of Make Ready committed ports (8,487 ports, or 49%) are associated with MUDs. Across program offerings, a substantial share of committed ports are located in DACs, including 55% of Make Ready ports, 29% of NCR ports, and 41% of DCFC ports. The Program is on track to meet and exceed Make Ready Expansion participation targets for both DACs and MUDs. Through prioritization of DAC applications, CRLD has raised the cumulative share of Make Ready ports committed in DACs to 55%. In 2025 alone, 76% of newly submitted Make Ready ports were located in DACs, supporting progress toward the Program's target of at least 50% of ports in DACs and 30% in MUDs by program end.
- **CRLD charging load generally aligns with off-peak and overnight periods, supporting grid integration objectives.** AMI analysis indicates that charging across CRLD sites occurs predominantly during off-peak hours, particularly overnight, with limited contribution to system peak demand. While charging behavior varies by market segment, observed load patterns suggest that CRLD installations are largely compatible with existing rate structures and grid conditions.
- **Installed CRLD infrastructure is increasingly utilized and drives environmental benefits.** AMI data show that both the number of energized sites and per-site electricity consumption increased in 2025, indicating rising utilization as chargers come online. Growth in utilization, combined with continued energization of new sites, has contributed to substantial increases in avoided greenhouse gas emissions, with program-to-date avoided emissions reaching an estimated 11,772 MT CO₂e. These results suggest that installed infrastructure is being actively used and contributes to transportation electrification outcomes at scale.
- **Project timelines are highly variable, and sources of project delays are largely driven by external factors.** CRLD projects experienced average end-to-end timelines of approximately 2.7–2.8 years for CIR and CSMR applications, with substantial variation across sites. Delays are driven primarily by factors outside SCE's direct control, including local permitting processes, customer-side approvals and procurement, and jurisdiction-specific requirements. While SCE-controlled phases show more consistency, overall timelines remain highly sensitive to site-specific conditions and external actors.
- **Site host interviews confirmed the frequency of delays.** Twenty of the 25 site host interviews in 2025 reported timeline challenges. While many acknowledged the inherent complexity of EV infrastructure construction and external factors such as COVID-related disruptions or equipment shortages, several site hosts reported that timelines were not clearly communicated upfront or during periods of delay.
- **Some hosts described significant gaps** between initial time estimates and actual project completion, which created cascading challenges, including grant extension requests, tenant communication issues, and charging technology obsolescence. EVSPs also highlighted project timeline challenges affecting their ability to predict workforce needs in advance. During 2025, SCE implemented process improvements to reduce avoidable delays, including shifting the

consultation review from virtual meetings to email-based reviews. This change reduced scheduling constraints and streamlined early-phase interactions for some customers.

- **Recommendation:** Continue streamlining processes and strengthen expectation-setting around timelines and coordination. The CRLD Program should continue to consider opportunities to streamline application, review, and procurement processes, particularly during early project phases where administrative delays are most common. In parallel, SCE should emphasize setting clear and realistic timeline expectations at enrollment and provide proactive updates when delays occur, especially when schedules are affected by external factors. Clearer communication regarding anticipated timelines, common sources of delay, and participant responsibilities—along with improved coordination across customers, contractors, network service providers, charging station vendors, and permitting agencies—could help reduce confusion, improve handoffs, and enable site hosts to better manage stakeholder expectations over the course of a project. Additionally, public charging programs should incorporate realistic timeline frameworks into enrollment materials, accounting for any EV market insecurities, and standardize protocols for proactive communication about potential delays. Treating multi-stakeholder timeline coordination as a structural feature of TE program delivery — rather than as a case-by-case operational matter — can reduce participant frustration and improve completion rates across program administrators.
- **Financial clarity is a key driver for nonparticipating site hosts in DACs and serving MUDs.** Interviews with nonparticipating MUD property owners and DAC businesses indicate that uncertainty around up-front costs, ongoing operation and maintenance expenses, rebates, and potential utilization or revenue remains a significant barrier to participation. Many potential participants expressed a need for clearer, written information early in the decision-making process to evaluate return on investment and compare contractor options.
 - Recommendation: Decision-makers in DAC business and multifamily property segments rely heavily on written, comparison-ready information — including typical cost ranges, rebate mechanics, ongoing operation-and-maintenance responsibilities, and ROI frameworks — when evaluating whether to install EV charging. Provide clearer early-stage materials outlining typical cost ranges, rebate availability, ongoing operational responsibilities, and expected decision points.

Even high-level cost frameworks may help site hosts assess feasibility and reduce drop-off prior to application. They viewed SCE as a trusted source of information and preferred to receive information electronically. Incorporating these sorts of materials into the pre-application process for future public charging programs may encourage more uptake in these segments.
- **Site hosts view electric vehicle charging as a valued amenity, even when utilization is uncertain.** Participating site hosts frequently characterized EV charging as an amenity that enhances property attractiveness for tenants, employees, or customers. Interest from tenants and end users reinforces this perception, even where site hosts do not rely on direct revenue from charging to justify installations. This non-monetary value plays an important role in adoption decisions, particularly for MUD and workplace sites.
- **CRLD's financial incentives and electrical infrastructure support directly drive site host participation and the number of port installations.** Nearly all interviewed site hosts (22 of 23) reported they would have reduced, delayed, or not installed chargers without SCE support, including five who stated they would not have installed them at all. Site hosts also emphasized that SCE's infrastructure work was essential to project feasibility, enabling installations that otherwise would not have been possible.
- **End users and site hosts report high overall satisfaction, alongside concerns about charging speed and technology obsolescence.** End users express strong satisfaction with most aspects of the charging experience; however,

charging speed remains a notable pain point, with 56% of respondents reporting low to moderate satisfaction. Site hosts similarly rate the installed equipment and SCE's program delivery highly, with average satisfaction scores of 9 out of 10. Despite this positive feedback, many site hosts report concerns about charger performance limitations over time and the rapid pace of EV charging technology advancement. Several site hosts noted frustration with long-term program requirements that limit their ability to upgrade or replace aging or underpowered equipment as vehicle charging needs evolve.

- **Recommendation:** Consider enhancements to charging performance and greater flexibility to support future technology upgrades. SCE should continue to consider opportunities to deploy higher-powered charging technologies, particularly at sites with demonstrated demand or sustained utilization, to address end-user concerns related to charging speed. In addition, the CRLD Program, along with future public charging programs, should consider introducing greater flexibility within long-term participation requirements by identifying clear pathways for equipment upgrades or technology refreshes as newer charging technologies become available. Providing structured options for upgrades over time could help ensure that installed infrastructure remains responsive to evolving EV charging needs while preserving program continuity and customer satisfaction.
- **EVSP satisfaction varies significantly based on the consistency of communication and continuity of support.** EVSPs report largely positive experiences with SCE when a designated point of contact was in place, noting that this enabled timely communication, clear guidance on program and technical requirements, and efficient issue resolution. In contrast, EVSPs without an assigned contact describe delays, inconsistent information, and increased administrative burden. Overall, respondents value CRLD's design, outreach efforts, and role in enabling projects that may otherwise be cost-prohibitive, while also expressing concerns about funding continuity and limited transparency around project timelines.
 - **Recommendation:** Strengthen the consistency of SCE's engagement with participating service providers. This includes maintaining clearly assigned points of contact throughout the project lifecycle and proactively communicating any transitions to ensure continuity of support. Standardize communication practices (e.g., provide regular, timely updates on application status, funding availability, timeline expectations, and program changes) to help reduce both EVSP and site host burden and improve transparency. Improve the accessibility and visibility of existing centralized program guidance and requirements to reduce reliance on individual contacts and minimize inconsistencies in information.
- **Site hosts report post-installation challenges related to charger performance and uncertainty about ongoing responsibilities.** Many site hosts experienced challenges after installation when troubleshooting charging station issues. Although SCE directly maintains charging stations only at Turn-key sites, site hosts often reported difficulty determining which entity—such as the EVSE manufacturer, network provider, contractor, or software vendor—was responsible when issues arose. Communication gaps among these parties frequently prolonged issue resolution and increased frustration. Site hosts also described recurring technical issues, including networking and software problems as well as major equipment failures requiring replacement, which were more commonly associated with older charging technology. While responsibility for resolving these issues typically falls outside of SCE's scope, the novelty of EV charging technology and the number of involved stakeholders make it difficult for site hosts to navigate post-installation support and identify clear paths to resolution.
 - **Recommendation:** Set clearer expectations and provide guidance to help site hosts navigate post-installation responsibilities. The CRLD Program should consider strengthening post-installation communications to clearly set expectations regarding ongoing maintenance responsibilities, typical charger issues, and appropriate escalation pathways. Providing site hosts with accessible guidance—such as role

delineation among manufacturers, network providers, contractors, and other stakeholders—could help reduce confusion and frustration when issues arise. While SCE may not directly resolve post-installation challenges outside its scope, clearer expectation-setting and reference materials could improve site host experience, support more efficient issue resolution, and reinforce program transparency.

- **The IOU owner-operator model has been challenging to scale under CRLD, offering a transferable lesson for the design of future TE programs and tariffs.** Although the Turn-key offering was designed to remove cost barriers for DAC-MUDs by having SCE install, own, and operate charging stations on customers' behalf, adoption has been limited, and customers have consistently preferred self-ownership pathways — including the maintenance-and-networking rebate within CIR that lets DAC-MUD customers own and operate their chargers while SCE offsets ongoing O&M costs. SCE's decision to pivot the DCFC offering toward a customer-ownership default reflects the same dynamic. Long-duration operational commitments, cost-tracking complexity for IOU-owned assets, and rapid EVSE technology turnover add further implementation challenges.
 - **Recommendation:** Future TE programs and tariffs that contemplate IOU ownership of distributed charging assets should, by default, consider customer-led ownership pathways paired with utility-administered O&M cost offsets. Where IOU ownership is retained for narrowly defined site categories, program design should account upfront for total cost of ownership across the asset life, clear operational scope boundaries, supporting data systems, and equipment-refresh flexibility within long-term commitments.
- **Targeted engagement with trade professionals reduced knowledge gaps and improved application quality.** In 2025, SCE prioritized engagement with trade professionals through focused training and ongoing communication, which program staff reported improved trade professionals' understanding of CRLD program requirements and processes. This engagement was particularly effective in generating additional New Construction Rebate (NCR) applications as the program approached sunset. Program staff also noted fewer knowledge gaps and higher-quality, more complete applications submitted by trade professionals as SCE increased touchpoints and provided targeted guidance, helping streamline application review and processing.
- **Targeted outreach increased NCR activity in 2025, though participation remained constrained due to updated building code requirements.** The New Construction Rebate (NCR) Program closed to new applications on July 12, 2025. In advance of program sunset, SCE prioritized marketing and outreach for the NCR offering and received 22 applications in 2025 representing 4,870 requested ports, reflecting an increase in average port counts per application. Despite these efforts, overall NCR participation remained below program targets, largely due to increasingly stringent CALGreen Code requirements, and high construction costs that reduced the incremental incentive value of the program for new developments. The 10-year program commitment contributed to additional hesitation for NCR participation, and was described by site hosts as a point of frustration to participation in other program offerings.

Across 2025 NCR applications, 44% of committed ports were located in DACs, raising the cumulative share of NCR ports committed in DACs to 29%. While these results indicate progress toward equity objectives, they also suggest that code-driven market conditions limited the Program's ability to fully achieve NCR participation targets prior to sunset.

- **Recommendation:** Future program designs should prioritize more flexible participation options to encourage program enrollment from additional sectors. Rebate programs like SSR, allowed sites who only needed four or fewer L2 charging stations to get financial support. With 46 financially closed out sites and low utility-borne costs at only \$3,491 per port on average. Further, offering different contract lengths may alleviate participation concerns for site hosts who have concerns about technological obsolescence or property turnover.

Appendix A. Methods

AMI Data Analysis

Data Cleaning and Aggregation

The evaluation team relied on AMI electric consumption data to observe charging patterns at CRLD application sites. We received the AMI data monthly at the meter level and in 15-minute intervals. Our initial data ingestion and exploration processes confirmed that daylight savings and time zones were correctly applied. We reviewed the data for inconsistencies and then conducted data reformatting, cleaning, and aggregating. Table 43 summarizes the cleaning steps made to the AMI data as part of the data preparation and cleaning process. Notably, no applications were dropped through our data cleaning. We leveraged the cleaned AMI data in the charging pattern analysis.

Table 43. 2025 AMI Cleaning Steps

Cleaning Step	Cleaning Step Type	Number of Records Remaining	Total Records Impacted	Percent of Total Records Impacted	Number of Applications
Initial Count	N/A	71,159,877	N/A	N/A	311
Perfect Duplicates	Drop	69,907,536	1,252,341	1.76%	311
Irregular Timestamps	Drop	69,907,536	0	0%	311
Missing or Null Usage	Drop	69,907,536	0	0%	311
Aggregate Imperfect Duplicates	Combine	69,873,509	34,027	0.05%	311
Impute Missing Intervals	Imputation	69,874,552	1,043	<0.01%	311
Roll Up to the Application Level	Combine	69,814,008	60,544	0.09%	311
Roll Up to the Hourly Level	Combine	17,453,503	52,360,505	73.58%	311
Final Count	N/A	17,453,503	53,708,460	75.48%	311

Calculation of Load Management and Grid Integration Metrics

Table 44 provides calculations and descriptions of charging pattern analysis metrics.

Table 44. Metric Calculation Descriptions

Metric	Calculation Description
Average Demand (kW)	Average hourly demand across all applications
Max Demand (kW)	Maximum hourly demand across all applications
Total Usage (kWh)	The sum of total consumption across all applications
Total On-Peak Usage (kWh)	The sum of consumption during SCE on-peak hours (Weekdays from 4 p.m. to 9 p.m. PST)

Metric	Calculation Description
Total Off-Peak Usage (kWh)	The sum of consumption during SCE off-peak hours (Weekends and Weekdays from 9 p.m. to 4 p.m. PST)
Percent On-Peak Usage (%)	On-peak usage divided by Total Usage
Percent Off-Peak Usage (%)	Off-peak usage divided by Total Usage

Greenhouse Gas Calculations

Carbon Intensity of Electricity

Starting with the 2024 program year, the evaluation team applied quarter-hour variable CI values to evaluate greenhouse gas impacts. Historically, the team sourced the CI of electricity from SCE’s Sustainability Reports. These fixed annual values were applied to all consumption that occurred each year, regardless of the hour of the consumption, and are shown in the second column of Table 45.⁹⁴ Weighted by the consumption across the four years, the average CI of electricity using the sustainability reports was 33.99 *gCO₂e/MJ*.

The average CI of electricity of the CARB LCFC quarter-hourly values, weighted by charging consumption, is presented in the last column of Table 45. Across all four years, the weighted average CI of electricity was 73.41 *gCO₂e/MJ*. The difference in average CI may be attributable to differences between California's overall grid generation resources and those specific to SCE. The evaluation team applied the CARB CI for electricity as it accounts for variability across hours. We recommend that SCE records CI at the quarterly hourly level in the future, as this information would enable a more detailed assessment of GHG impacts specific to SCE.

Table 45. CI of Electricity Sustainability Report and CARB Comparison

Year	SCE Sustainability Report CI of Electricity (CO2e/MJ).	CARB Quarterly Hourly LCFC Weighted Average CI of Electricity (MT CO2e)
2022	51.03	57.97
2023	40.07	76.34
2024	32.76	67.57
2025	Not Available	75.62
Weighted Average	33.99	73.41

Customer Research

Nonparticipant Methodology

To explore motivators and barriers to participation in the CRLD program among property owners of multi-dwelling units (MUDs) and among business in DACs, interviews were conducted with program-eligible customers. To qualify for the interview, respondents must have been the owner or manager of the MUD or business in a DAC, had an SCE commercial

⁹⁴ SCE’s 2024 Sustainability Report Sustainability Scorecard, CO2e Emissions from Delivered Electricity Rate (lbs/MWh).

account separate from the tenants' accounts, and not have participated in the CRLD program previously. These interviews were conducted using Microsoft Teams, lasted between 45 minutes and one hour, and were held between October 2025 and February 2026. The interviews were recorded with the respondents' permission, and they received a \$200 gift card for completing the interview.

The interviews were semi-structured, allowing the conversation to focus on what was important for the respondent. Due to this, not all questions were asked of every interviewee, and the sample size varies for some analyses. MUD property owners and managers were sufficiently similar to business owners and managers in DACs, such that their findings are presented together in many places. When findings differ meaningfully between groups it is noted.

Table 46 provides a description of the interviewees from MUDs. These property owners/managers worked across an even spread of property sizes and the number of properties owned/managed per respondent ranged as well. Six of eleven respondents worked for property management groups, and five operated as sole proprietors. The majority have market-rate properties with parking lots open to the public. Five of eleven respondents already had EV chargers available at least one of their properties, while six did not have EV chargers at any of their properties.

Table 46. Respondents from MUDs (n=11)

Characteristics	Number of Respondents
Property Size	
Small (5 or fewer units)	4
Medium (6-15 units)	3
Large (16+ units)	4
# Properties Owned/Managed	
5 or less	3
6-10	4
11+	4
Property Type	
Market rate	7
Affordable housing	0
Combination	4
Building Ownership Model	
Property management company	6
Sole proprietor	5
Resident Ownership Model	
Rent	8
Own	1
Both	2
Parking Open to General Public	

Characteristics	Number of Respondents
Yes	6
No	5
EV Chargers Available	
Yes	5
No	6

Table 47 describes the interviewees from businesses in DACs. Forty percent of businesses were retail, while 20% were nonprofit organizations and the rest ranged from professional service companies to restaurants. Most businesses operated out of a single location, and did not have EV chargers available on-site.

Table 47. Respondents from DACs (n=10)

Characteristics	Number of Respondents
Business Type	
Retail	4
Nonprofit	2
Professional or trade services	1
Warehouses	1
Health or medical services	1
Food service	1
Business Size	
Single location	7
Multiple locations	3
EV Chargers Available	
Yes	2
No	8

EVSP Interview Methodology

The evaluation team interviewed 10 participating EVSPs between March and April 2026. Outreach began with a list of 54 unique contacts, prioritizing those identified by SCE as key EVSPs (i.e., highest participating EVSPs), before expanding to the remaining contacts on the list. This approach resulted in interviews with 10 EVSPs, including three identified by SCE as key EVSPs. To better understand how the CRLD program has influenced hiring practices and workforce needs, we conducted in-depth interviews with EVSPs who have been involved in the program since 2021. The interviews explored several key areas, including company involvement in the program, workforce demand and development, job creation and hiring strategies (both overall and within DACs), EV charging cost structures, and experiences with the application and implementation

processes. Respondents also shared their satisfaction with the CRLD program and provided suggestions for improvement. Table 48 contains the number of contacts, interviews, and response rate.

Table 48. EVSP Interview Sample

Unique Contacts	Number of Conducted In-Depth Interviews	Response Rate
54	10	19%

Site Host Methodology

The evaluation team interviewed 25 participating site hosts with EV charging sites in two rounds, conducted in the spring and fall of 2025. A next round of site host interviews is planned for Fall of 2026. The results from this round will be reported in the next evaluation report. We conducted these interviews to gather insights into participant experiences with the CRLD program that may help SCE meet the evaluation objectives set out in CPUC Decision 20-08-045 (D.20-08-045) as well as the standard reporting requirements for SB 350 Transportation Electrification (TE) programs while continuously monitoring its program performance. Additionally, customers’ decisions to participate were explored and their experiences post-installation.

Table 49. Interview Site Methodology

Interview Rounds	Unique Contacts	Number of Sites Associated	Number of Conducted In-Depth Interviews	Response Rate
Round 3 – 2025	37	30	14	38%
Round 4 - 2025	25	20	11	44%
Total	62	50	25	40%

Table 50 presents a summary of the interviewed site hosts’ characteristics. Most interviewed site hosts reported that the properties where the charging infrastructure was installed were government-owned (9), corporate-owned (7), or multi-family (7), with the remaining at educational facilities (2).

Table 50. Interviewed Site Host Characteristics

Property Structure	Property Owned ^a	Employee Count ^b
Government (9) Commercial (7) MUD (7) Education (2)	Only 1 (8) 2-100 (13)	One employee (4) 2-100 employees (5) 101-1,000 employees (8) 1,000+ employees (3)

^a Four site hosts did not respond to this question.

^b Five site hosts did not respond to this question.

End-User Surveys Respondent Demographics

Table 51. End-User Respondent Demographics

Demographics	Percentage of Respondents
2023 Pre-Tax Household Income (n=70)	
Less than \$15,000	1%
\$15,000-\$24,999	1%
\$25,000-\$49,999	4%
\$50,000-\$74,999	10%
\$75,000-\$99,999	10%
\$100,000-\$124,999	16%
\$125,000-\$149,999	10%
\$150,000-\$174,999	6%
\$175,000-\$199,999	7%
\$200,000-\$249,999	14%
\$250,000-\$299,999	4%
\$300,000-\$399,999	1%
\$400,000-\$499,999	1%
\$500,000 or more	1%
Prefer not to say	11%
Age (n=63)	
25-34	10%
35-44	21%
45-54	22%
55-64	17%
65+	30%
Relationship to Property (n=70)	
Resident	37%
Employee	29%
Customer	19%
Resident of nearby property	6%

Demographics	Percentage of Respondents
Using services at nearby facility	6%
Visitor	3%
Customer at nearby business	1%
Type of Vehicle Driven (n=70)*	
Battery EV	74%
Plug-in Hybrid EV	19%
Gasoline	16%
Hybrid	3%
Don't know	1%
Miles Driven Per Week (n=64)	
0-49	6%
50-99	20%
100-199	20%
200-299	28%
300-399	13%
400-499	6%
500+	6%

Percentages may not add up to 100% due to rounding.

*indicates that respondents were able to select all that apply.

Cost Analysis Literature Review

Table 52. Alternate Utility Costs by Selected Sub-Program

Utility Name	Citation
Connecticut Statewide Electric Vehicle Charging Program	Public Utilities Regulatory Authority. Connecticut Electric Vehicle Charging Program: Joint EDC Annual Report - Program Cycle Year 4 (2025). June 2025.
Duke Energy Florida	Duke Energy Florida, LLC. Electric Vehicle Charging Station Pilot Program and Park & Plug: 5th Annual Report (December 2022). Florida Public Service Commission, 2023. https://www.psc.state.fl.us/library/filings/2023/00015-2023/00015-2023.pdf
National Grid (Massachusetts)	National Grid. MA EV Phase II Program Year 5 and Phase III Program Year 2 Annual Report. May 2025. https://eeaonline.eea.state.ma.us/dpu/fileroom/#/dockets/docket/12566

PG&E	Southern California Edison Company, San Diego Gas & Electric Company, and Pacific Gas and Electric Company. 2022. Compliance Filing ... Pursuant to Ordering Paragraph 2 of Decision 16-06-011. March 31. California Public Utilities Commission, Rulemaking 18-12-006.
PSEG Long Island	PSEG Long Island. Utility 2.0 Long Range Plan & Energy Efficiency Plan: 2024 Annual Update Version 2. August 2024. https://www.psegliny.com/aboutpseglongisland/legalandregulatory
PSE	Puget Sound Energy. Transportation Electrification Summary Report. December 2025. https://apiproxy.utc.wa.gov/cases/GetDocument?docID=107&year=2021&docketNumber=210191
SDG&E	San Diego Gas and Electric. Power Your Drive Research Report. April 2021. https://www.sdge.com/regulatory-filing/10676/sdge-electric-vehicle-grid-integration-pilot-program
Xcel Energy	Xcel Energy. 2024-2026 Transportation Electrification Plan Annual Report. October 2025. https://www.xcelenergy.com/company/rates_and_regulations/filings/transportation_electrification_plan



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