

50

STATES OF ELECTRIC VEHICLES

Q3 2024 Quarterly Report

Executive Summary



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The [NC Clean Energy Technology Center](#) is a UNC System-chartered Public Service Center administered by the College of Engineering at North Carolina State University. Its mission is to advance a sustainable energy economy by educating, demonstrating and providing support for clean energy technologies, practices, and policies. The Center provides service to the businesses and citizens of North Carolina and beyond relating to the development and adoption of clean energy technologies. Through its programs and activities, the Center envisions and seeks to promote the development and use of clean energy in ways that stimulate a sustainable economy while reducing dependence on foreign sources of energy and mitigating the environmental impacts of fossil fuel use.

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PREVIOUS EDITIONS AND OTHER 50 STATES REPORTS

The full version of this report may be purchased [here](#). Previous executive summaries of *The 50 States of Electric Vehicles* are available for download [here](#).

In addition to *The 50 States of Grid Modernization*, the NC Clean Energy Technology Center publishes additional quarterly reports called *The 50 States of Solar*, *The 50 States of Grid Modernization*, and *The 50 States of Power Decarbonization*. These reports may be purchased [here](#). Executive summaries and older editions of these reports are available for download [here](#).

ABOUT THE REPORT

PURPOSE

The purpose of this report is to provide state and local lawmakers and regulators, electric utilities, the electric power industry, the transportation industry, and other energy stakeholders with timely, accurate, and unbiased updates about how states are choosing to study, adopt, implement, amend, or discontinue policies associated with electric vehicles. This report catalogues proposed and approved legislative, regulatory, and utility rate design changes affecting electric vehicles during the most recent quarter, as well as state and investor-owned utility proposals to deploy electric vehicles and charging infrastructure.

APPROACH

The authors identified relevant policy changes and deployment proposals through state utility commission docket searches, legislative bill searches, popular press, and direct communications with stakeholders and regulators in the industry.

Questions Addressed

This report addresses several questions about the U.S. electric vehicle landscape, including:

- How are states addressing barriers to electric vehicle and charging infrastructure deployment?
- What policy actions are states taking to support markets for electric vehicles and related infrastructure?
- How are utility companies designing rates and electric vehicle supply equipment companies designing charging equipment and controls to influence charging behavior of electric vehicle owners?
- Where and how are states and utilities proposing to deploy or pay for electric vehicles and electric vehicle charging infrastructure?

Actions Included

This report focuses on cataloguing and describing important proposed and adopted policy changes related to electric vehicles. For the purpose of this report, the definition of electric vehicle includes all-electric vehicles (EVs), hybrid electric vehicles (HEVs), and plug-in electric vehicles (PHEVs). In order to explore all policy actions related to electric vehicles, this report catalogs and describes actions related to the deployment of electric vehicle charging equipment, which is often referred to as electric vehicle supply equipment (EVSE). Additionally, the electric grid is impacted

by electric vehicle charging, so legislative and regulatory actions related to electric utilities are included in this report.

In general, this report considers an “action” to be a relevant (1) legislative bill that has been introduced, (2) executive order, or (3) regulatory docket, utility rate case, or rulemaking proceeding. Only statewide actions and those related to investor-owned utilities are included in this report. Specifically, actions tracked in this issue include:

Studies and Investigations

Legislative or regulatory-led efforts to study electric vehicles specifically, or electric vehicles as part of a broader grid modernization study or investigation.

Regulation

Changes to state rules related to electric vehicles, including registration fees, homeowner association limitations, and electricity resale regulations affecting vehicle charging.

Utility Rate Design

Proposed or approved changes to investor-owned utility rate design for electric vehicles, including new electric vehicle tariffs and significant changes to existing electric vehicle tariffs.

Market Development

New state policy proposals or changes to existing policies aimed at growing the electric vehicle market.

Financial Incentives

New state or investor-owned utility incentive programs or changes to existing incentive programs for electric vehicles and charging infrastructure.

State and Utility Deployment

Utility-initiated requests, as well as proposed legislation, to deploy electric vehicles or charging infrastructure.

Actions Excluded

While actions taken by municipal utilities and electric cooperatives are not comprehensively tracked in this report, particularly noteworthy or high-impact actions are included. The report also excludes actions related to grid modernization without an explicit electric vehicle component, as well as actions related to general time-varying rates not specific to vehicle charging; these types of actions are tracked in the 50 States of Grid Modernization report series.

EXECUTIVE SUMMARY

Q3 2024 ELECTRIC VEHICLE ACTION

In Q3 2024, 35 states plus DC and Puerto Rico took a total of 356 actions related to electric vehicles. Table 1 provides a summary of state and utility actions occurring during Q3 2024. Of the actions cataloged, the most common were related to Market Development (88), followed by Financial Incentives (85) and Regulation (85). All 50 states, plus DC and Puerto Rico, took actions planning for National Electric Vehicle Infrastructure (NEVI) program funding distribution.

Table 1. Q3 2024 Summary of Electric Vehicle Actions

Type of Action	# of Actions	% by Type	# of States
Market Development	88	25%	16 + DC, PR
Financial Incentives	85	24%	23 + DC
Regulation	85	24%	15 + DC, PR
Rate Design	55	15%	28 + PR
Studies and Investigations	24	7%	13
Deployment	19	5%	10 + DC
Total	356	100%	35 States + DC, PR

Note: The “# of States/ Districts” total is not the sum of the rows because some states have multiple actions. Percentages are rounded and may not add up to 100%.

TOP ELECTRIC VEHICLE ACTIONS OF Q3 2024

Five of the quarter’s most notable electric vehicle actions are noted below.

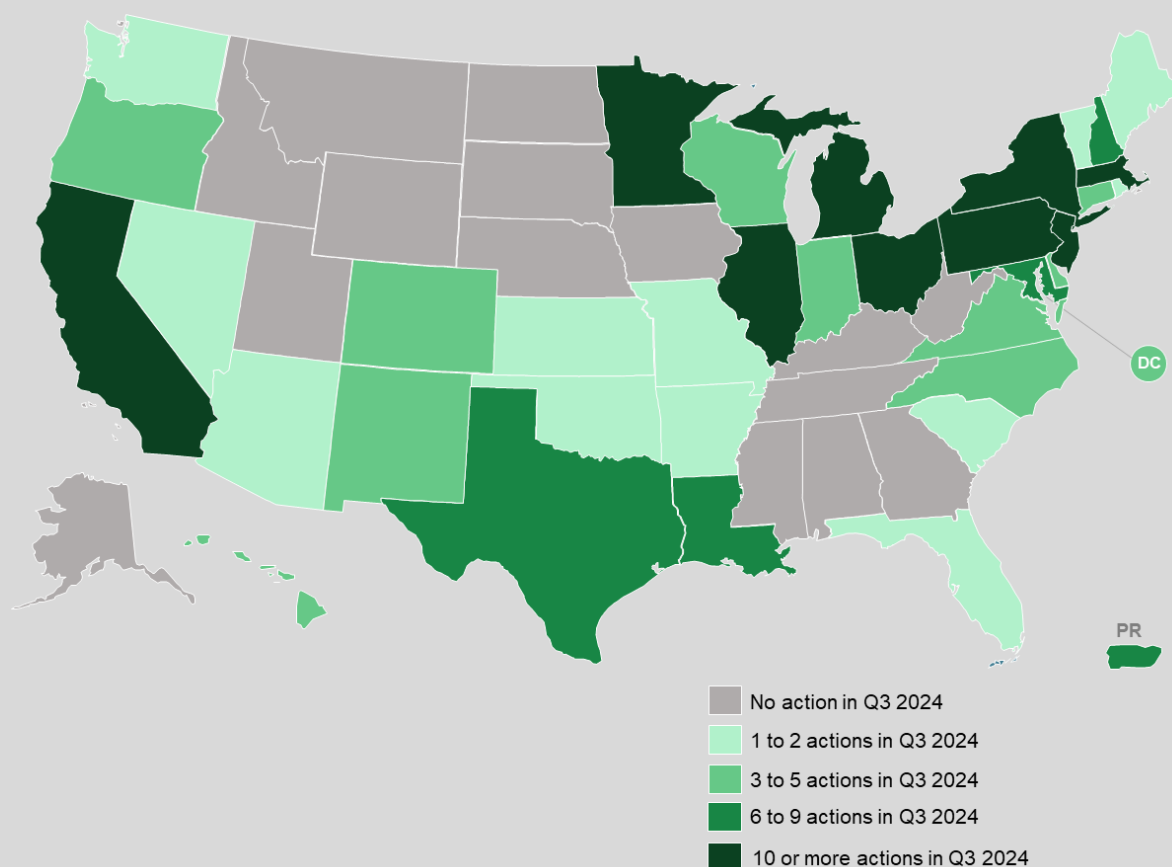
Delaware Lawmakers Approve State Fleet Target, Electric Vehicle Supply Equipment Study, and On-Street Parking Incentive

The Governor of Delaware signed multiple bills this quarter related to electric vehicles. Legislators established new targets for the state-owned fleet, requiring 100% zero-emission vehicles by 2040, with interim targets in 2026, 2029, and 2032. Two state agencies must perform an assessment of the state’s charging infrastructure availability and provide recommendations to close availability gaps; the agencies must also develop incentive programs with a focus on electric vehicle supply equipment for residential on-street parking.

Louisiana Regulators Adopt Recommendations Governing Charging Infrastructure

The Louisiana Public Service Commission accepted recommendations made by Commission Staff regarding various issues related to electric vehicle charging infrastructure. Customers can choose whether to separately meter their charging load, and the Department of Agriculture and Forestry will decide whether to use volumetric or time-of-use-based pricing. Under the new rules, regulated utilities cannot own, lease, operate, or control charging stations; multiple utilities filed a motion to overturn this provision.

Figure 1. Q3 2024 State and Utility Action on Electric Vehicles



Michigan Public Service Commission Staff Propose Rules for Transportation Electrification Plan Filings

Staff at the Michigan Public Service Commission submitted proposed rules for utility transportation electrification plans (TEPs) in July 2024. Utilities would be required to file TEPs every three years, starting in July 2025. The plans would be informational only, rather than

proposing program changes or requesting cost recovery, and should maximize the overall benefits of electrified transportation with minimal costs.

Rhode Island Finishes Alternative Fuel Corridor Buildout Under NEVI

Rhode Island became the first state in the nation to fully build out its Alternative Fuel Corridors under the National Electric Vehicle Infrastructure Plan. The state only needed four chargers at two locations to complete the buildout, and both sites became operational in July. It will now move on to Phase 2, prioritizing publicly accessible locations and underserved areas.

Energy Files New Residential Managed Charging Program Proposal in Kansas

Energy Kansas proposed a new residential managed charging program in its Phase 2 Transportation Electrification Portfolio. The opt-out passive sub-program encourages customers to shift their charging to off-peak times; there is no incentive, but time-of-use customers may see bill decreases if they shift. The opt-in active sub-program allows Energy to control participants' chargers and provides enrollment and participation incentives.

Figure 2. Top Electric Vehicle Actions of Q3 2024

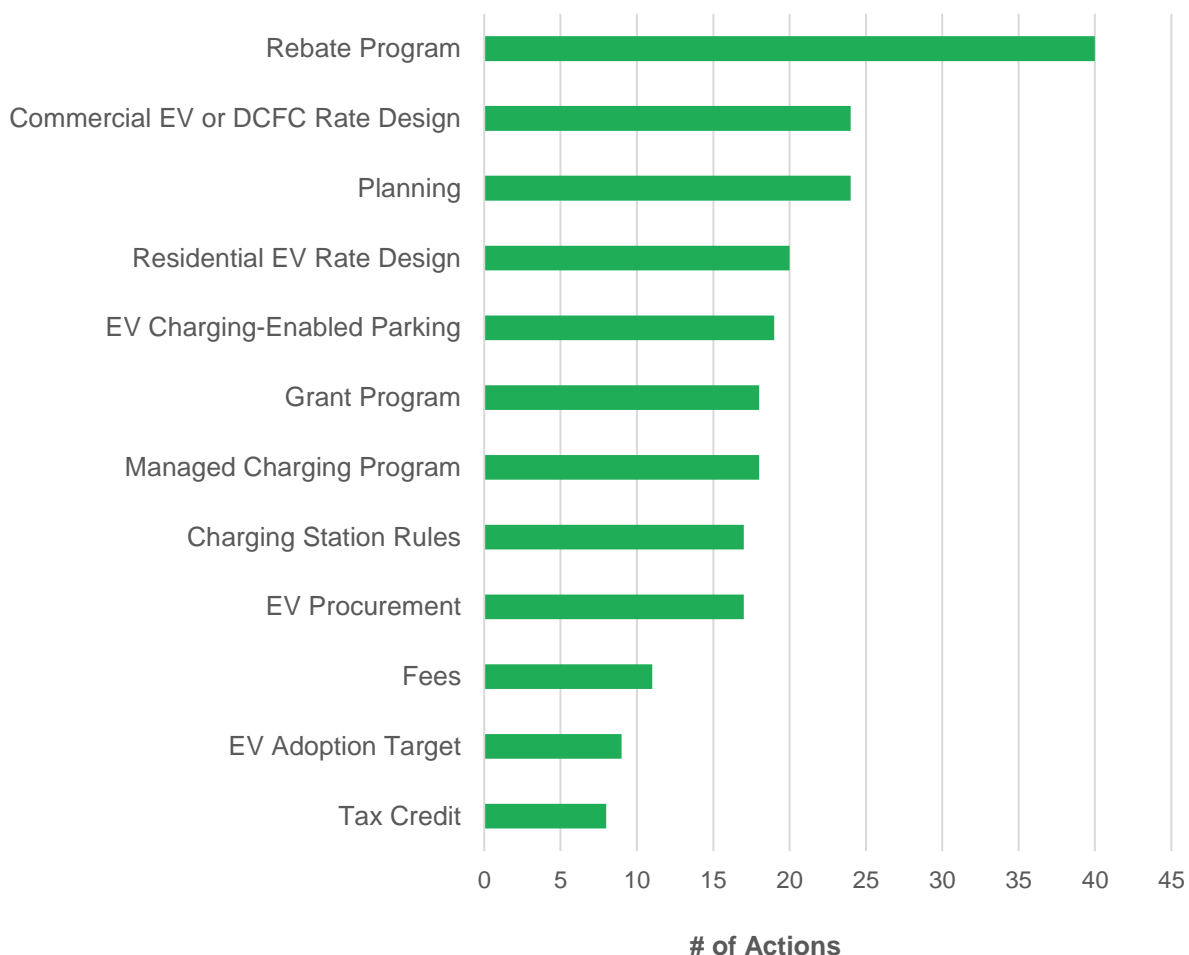
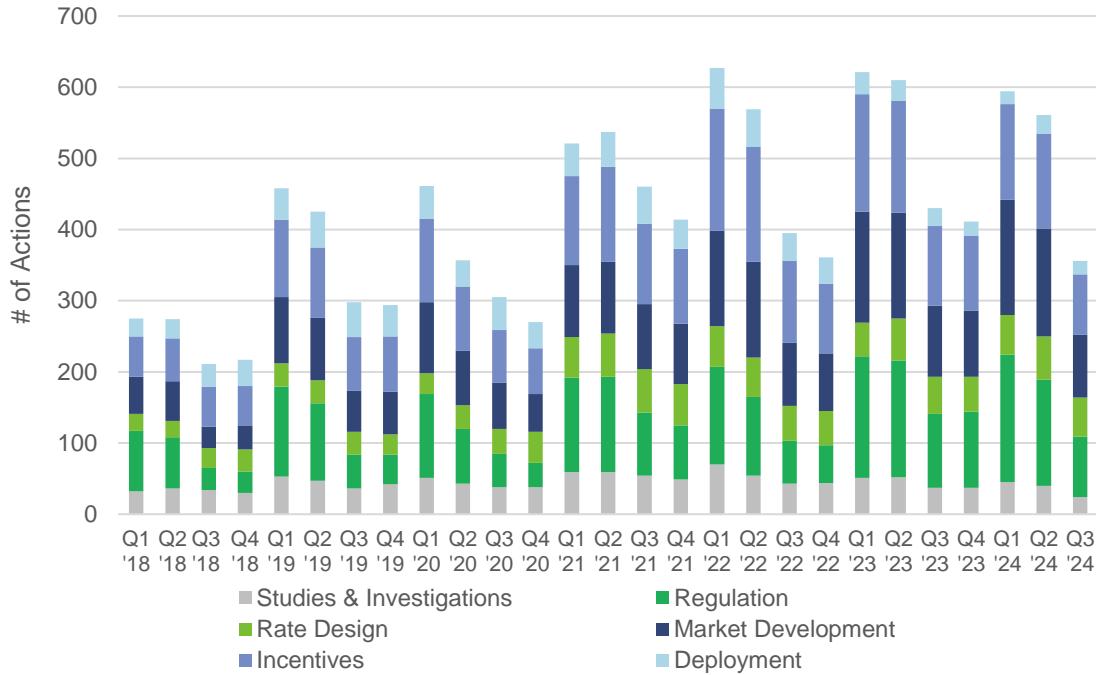


Figure 3. Electric Vehicle Action by Quarter, Q1 2018 to Q3 2024



TOP ELECTRIC VEHICLE POLICY TRENDS OF Q3 2024

States File FY2025 Updates to National Electric Vehicle Infrastructure Plan

Another September means another round of National Electric Vehicle Infrastructure (NEVI) Plan updates. States are required to submit annual NEVI updates to the Federal Highway Administration; while all the plans have been submitted, only a few are currently publicly available. Arizona has added additional Alternative Fuel Corridors (AFCs), expanding its eligible sites for Phase 1. Colorado clarified that it is addressing both Phase 1 and Phase 2 simultaneously, using its DCFC Plazas program to build out AFCs with NEVI funding and community-centric projects with state funding. Maine noted it will have operational NEVI stations by the end of the year, while Oklahoma has decided that existing compliant stations must apply to its Phase 1 Round 2 RFP in order to count toward the AFC buildout. Rhode Island built out Phase 1, and will soon begin Phase 2. Apart from the new plans, nine states had NEVI RFPs close during the quarter, while six had requests pending.

Utilities Integrate Electric Vehicle Programs into Larger Grid Improvement Planning

While transportation electrification plans are becoming more widespread, many utilities still integrate electric vehicle and charging station programs into overarching distribution system or beneficial electrification planning. The Minnesota Public Utilities Commission approved integrated distribution plans for three investor-owned utilities, which all submitted their transportation electrification plans as part of their distribution plans; Minnesota Power, Otter Tail Power, and Xcel Energy all proposed new rebate programs. Illinois' Commonwealth

Edison and Ameren proposed various changes to electric vehicle programs and charging station rebates under their new beneficial electrification plans, and the Massachusetts Department of Public Utilities approved electric-sector modernization plans for its three investor-owned utilities. Along with general grid improvement, the plans will enable millions of electric vehicles to be deployed across the state.

Utilities Pursue Line Extension Allowances

Line extension allowances are subsidies for contributions in aid of construction (CAIC) costs, which customers must pay for new construction to be connected to the grid. Many utilities include line extensions for transportation under these costs and rebates. As part of its beneficial electrification plan, Ameren Illinois is reorganizing its existing ChargeSmart rebates to fall under a new ChargeReady incentive program, including its supplemental line extension for non-residential customers. In Oregon, Portland General Electric proposed a new transportation line extension allowance as part of its pending rate case, while regulators in Minnesota approved Xcel Energy’s request to waive CAIC costs for residential charging infrastructure. Under a pending settlement agreement, Ohio’s First Energy has agreed to cover 80% of line extension costs, as long as it can fully recover its costs; the Public Utilities Commission approved this same provision for AEP Ohio last quarter.

Figure 4. 2024 Proposed Legislation on Electric Vehicles (as of late October 2024)

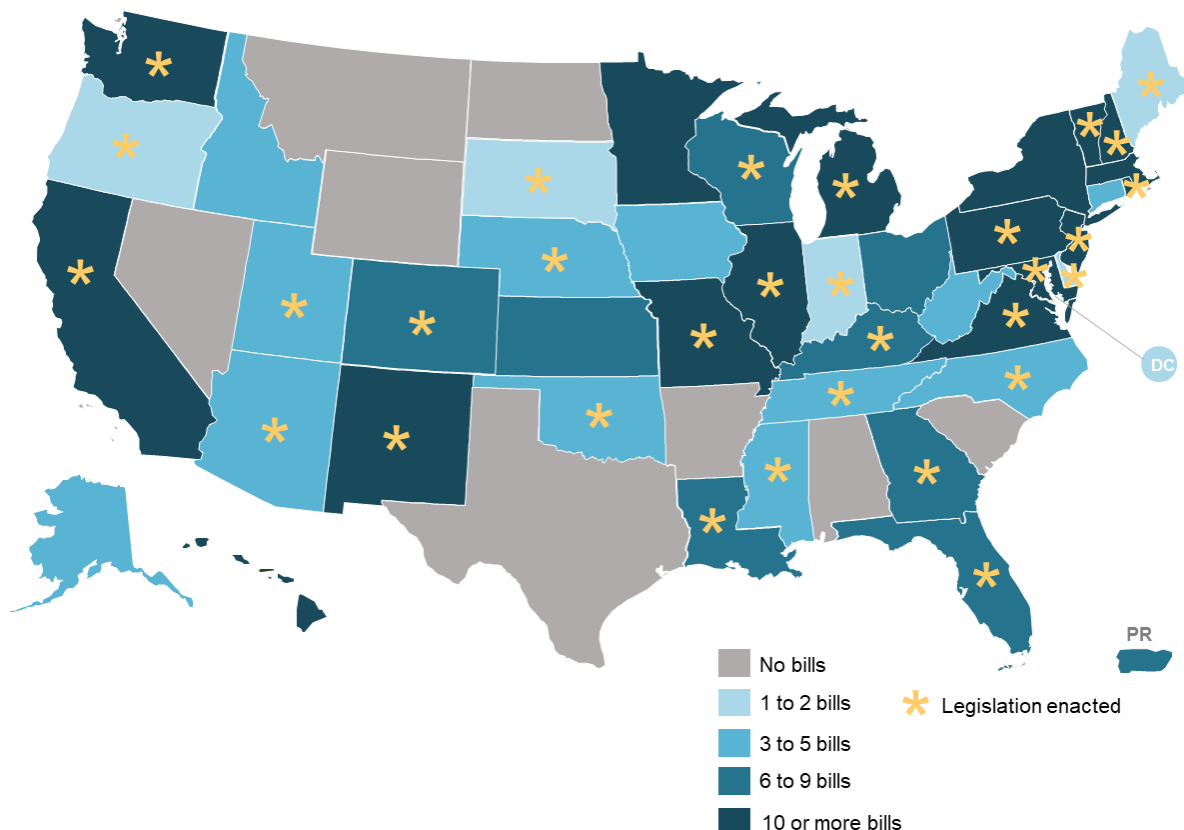
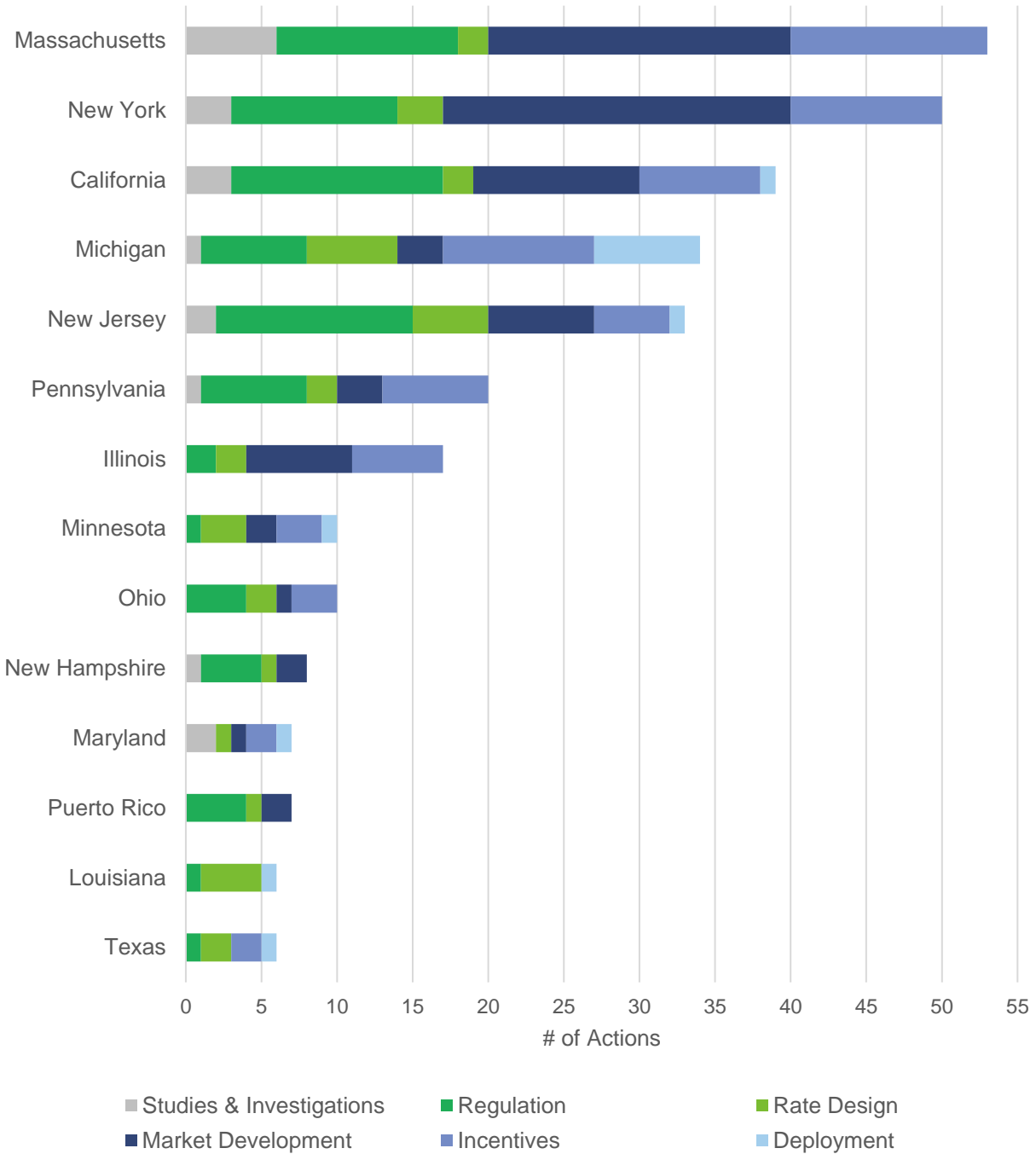


Figure 5. Most Active States of Q3 2024



FULL REPORT DETAILS & PRICING

FULL REPORT DETAILS

Content Included in the Full Quarterly Report:

- Detailed tables describing each pending and recently decided state and investor-owned utility action related to electric vehicles and charging infrastructure. Actions are broken out into the following categories:
 - Studies and Investigations
 - Regulation
 - Rate Design
 - Market Development
 - Financial Incentives
 - State and Utility Deployment
- Links to original legislation, dockets, and commission orders for each legislative and regulatory action
- Excel spreadsheet file of all actions taken during the quarter and separate Powerpoint file of all summary maps available upon request
- Qualitative analysis and descriptive summaries of electric vehicle policy action and trends
- Outlook of action for the next quarter

WHO SHOULD PURCHASE THIS REPORT

The 50 States of Electric Vehicles allows those involved in the electric and transportation industries to easily stay on top of legislative and regulatory changes. The report provides a comprehensive quarterly review of actions. At a cost of \$500 per issue (or \$1,500 annually), the 50 States of Electric Vehicles offers a significant time and financial savings. With direct links to original sources for all actions, customers may stay on top of legislative and regulatory developments between quarterly reports.

Electric Vehicle and Charging Infrastructure Companies

- Identify new market opportunities, as well as changing and risky markets
- Stay on top of state policy developments relevant to your business
- Give your own team a head start in tracking legislative and regulatory proceedings

Electric Utilities

- Learn about the approaches being taken by other utilities facing similar opportunities and challenges
- Stay on top of relevant state policy developments

- Utilize an objective source of information in legislative and regulatory proceedings

Investors and Financial Analysts

- Identify new investment opportunities and emerging areas of growth, as well as risky investments
- Identify active utility investment proceedings

Advocacy Organizations

- Learn about the electric vehicle actions under consideration across the country
- Learn about the outcomes of other states' policy discussions
- Utilize an objective source of information in legislative and regulatory proceedings

Researchers and Consultants

- Access valuable data requiring a vast amount of time to collect first-hand
- Identify research needs to inform electric vehicle proceedings
- Cite an objective source in your own research and analysis

PRICING

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