50 STATES OF ELECTRIC VEHICLES

Q1 2025 Quarterly Report

Executive Summary

NC CLEAN ENERGY TECHNOLOGY CENTER | DSIRE insight

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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 passed at least one chamber, (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. Only statewide actions and those related to investor-owned utilities are included in this report. An appendix of relevant bills that have been introduced, but not yet passed a chamber is provided at the end of the 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

Q1 2025 ELECTRIC VEHICLE ACTION

In Q1 2025, 35 states plus DC and Puerto Rico took a total of 170 actions related to electric vehicles. Table 1 provides a summary of state and utility actions occurring during Q1 2025. Of the actions cataloged, the most common were related to Rate Design and Managed Charging (47), Financial Incentives (47), and Regulation (33).

Table 1. Q1 2025 Summary of Electric Vehicle Actions

Type of Action	# of Actions	% by Type	# of States
Rate Design and Managed Charging	47	28%	24 + PR
Financial Incentives	47	28%	21
Regulation	33	19%	20 + DC
Market Development	22	13%	13 + DC
Deployment	11	6%	7 + DC
Studies and Investigations	10	6%	6
Total	**170**	**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 Q1 2025

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

New Jersey Utilities File Medium- and Heavy-Duty Electric Vehicle Plans

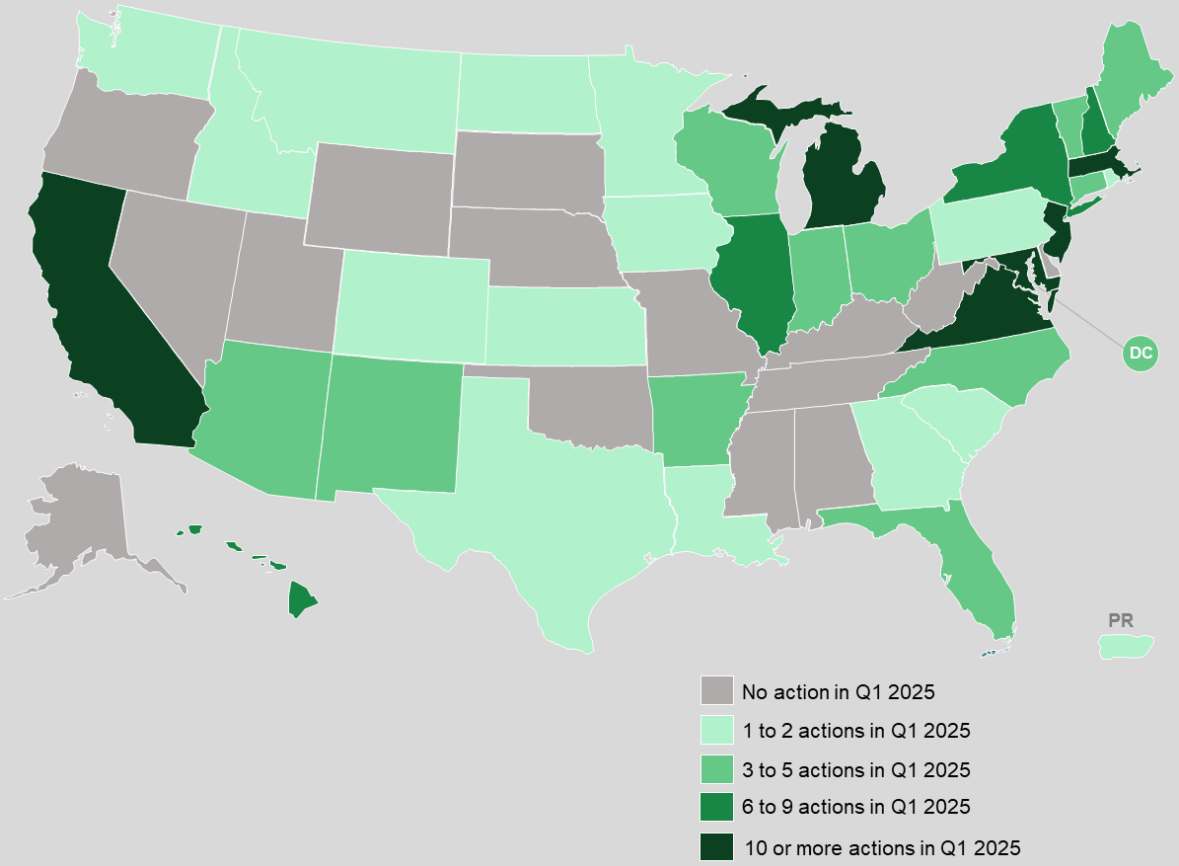
Investor-owned utilities in New Jersey filed their Medium- and Heavy-Duty Electric Vehicle Plans in February 2025. The plans include rebates for make-ready infrastructure for private fleets, public fleets, and public chargers, with adders for underserved communities. The plans also offer passive managed charging programs, and PSE&G is including technical advisory services and incentives for customer-side technologies.

Illinois Regulators Approve Utilities' Beneficial Electrification Plans

The Illinois Commerce Commission approved Ameren's and Commonwealth Edison's Beneficial Electrification Plans. Ameren will implement a new managed charging program, make-ready program, and Electric Vehicle–as-a-Service pilot for residential customers, along with a virtual

power plant pilot for electric school buses. Commonwealth Edison will revise its rebate values and invest in research & development for transportation electrification.

Figure 1. Q1 2025 State and Utility Action on Electric Vehicles



Federal Government Suspends NEVI Program for Review

The federal Department of Transportation and the Federal Highway Administration suspended review, plan approval, and guidance for the National Electric Vehicle Infrastructure (NEVI) Program, in line with the Department's and Administration's desire to review the program; updated guidance is expected in spring 2025. At least 15 states have officially announced program pauses in line with the federal pause.

Massachusetts Launches Statewide Vehicle-to-Everything Pilot

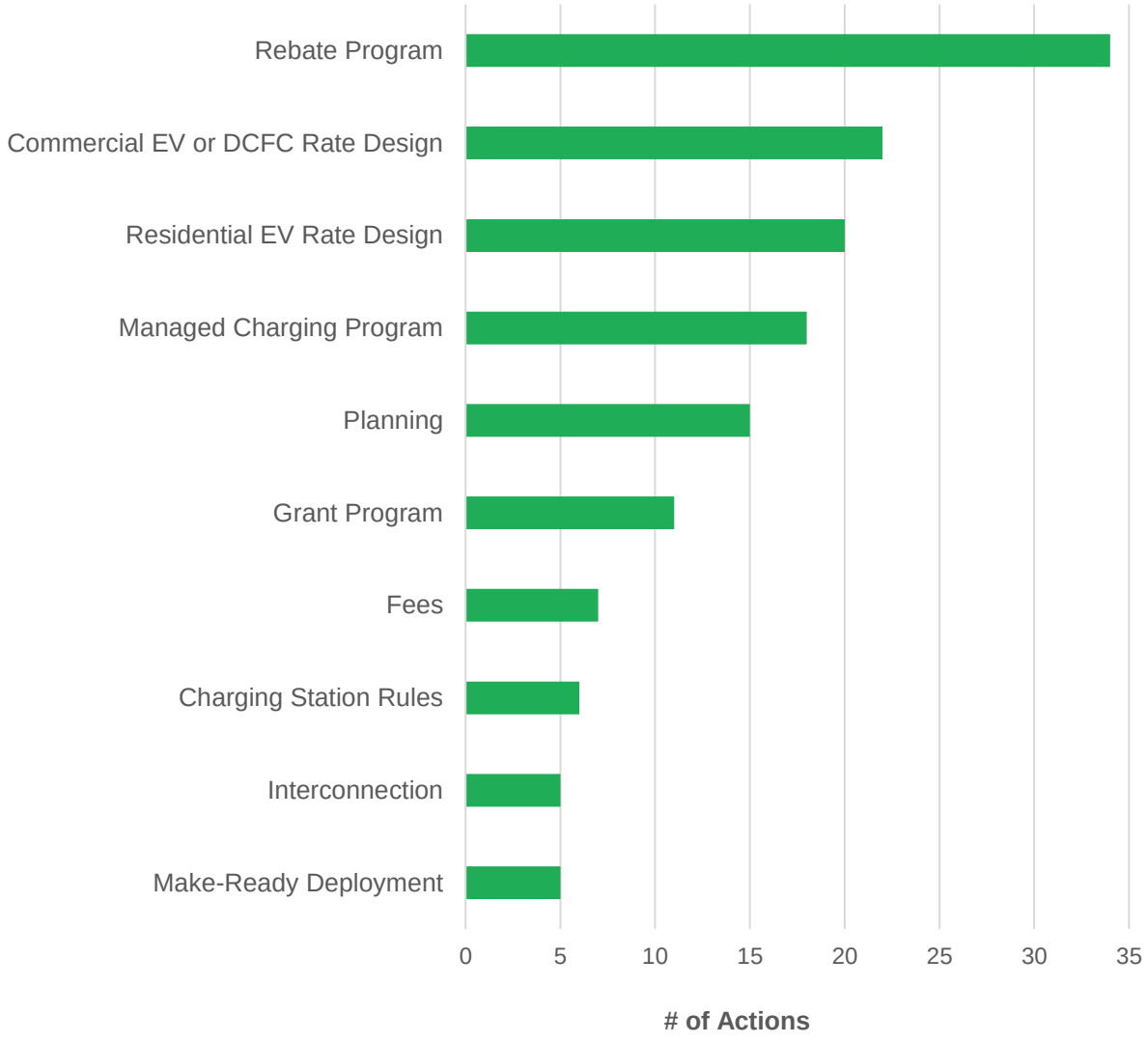
The Massachusetts Clean Energy Center began a statewide vehicle-to-everything (V2X) pilot that will deploy around 100 bi-directional chargers to residential, municipal, commercial fleet, and school district customers. Over the next two years, the Center will gather data to develop a V2X

Guidebook. Applications are due by July 31, 2025, and customers must have an existing vehicle capable of bi-directional power flow.

Virginia Lawmakers Pass Bill Regulating Utility Ownership and Transportation Electrification Plans

The Virginia General Assembly passed a bill that would allow investor-owned utilities to build, own, and/or maintain public DCFC stations starting in 2028, with geographic restrictions. The bill would also require the utilities to file Transportation Electrification Plans starting in 2026 and to develop commercial and industrial rates for high-voltage charging. The Governor returned the bill to the legislature with recommendations prohibiting utility ownership of public charging stations.

Figure 2. Top Electric Vehicle Actions of Q1 2025



TOP ELECTRIC VEHICLE POLICY TRENDS OF Q1 2025

Utility Regulators Approve Electric School Bus Programs

Utilities are proposing, and states are approving, programs dedicated to electric school buses that encourage their adoption through various types of incentives. The Maryland Public Service Commission approved two utility pilots for electric school buses. Potomac Edison will offer a grant covering the incremental cost between a diesel bus and an electric bus, for up to 28 buses, focusing on bi-directional charging. Baltimore Gas & Electric will provide point-of-sale rebates for buses, bi-directional chargers, and make-ready infrastructure. The Illinois Commerce Commission authorized Ameren to design a school bus virtual power plant pilot, while Connecticut regulators authorized the Connecticut Green Bank to administer a fleet advisory services program for school bus electrification planning, as long as the bank collaborates with the state's two investor-owned utilities.

Policymakers Pursue Restrictions and Retractions on Electric Vehicle Targets

State policymakers are attempting to restrict governments' ability to adopt requirements for electric vehicle adoption – whether it's local, state, or federal. In addition, states are pulling back on existing electric vehicle requirements. Idaho lawmakers enacted a bill prohibiting state- or local-level requirements for charging stations, designated electric vehicle parking spaces, or charging-related infrastructure in building plans. The Montana House passed a joint resolution requesting that the U.S. Congress eliminate all electric vehicle mandates, while California's Office of Administrative Law denied changes to the state's Low Carbon Fuel Standard adopted by the Air Resource Board, citing a lack of clarity and proper procedure. In early April, the Governor of Maryland signed an executive order easing compliance enforcement for Advanced Clean Cars II and Advanced Clean Trucks standards.

States and Utilities Consider Pilots for Vehicle-Grid Integration

Vehicle-grid integration – also known as vehicle-to-grid (V2G) or vehicle-to-everything (V2X) – treats electric vehicles like energy storage systems, allowing vehicles to send electricity back to the grid. With growing adoption of electric vehicles, V2G provides a new pathway for utility load management and flexibility. Georgia Power, as part of its integrated resource plan, aims to run a V2X pilot for public schools; the utility will install up to ten school bus chargers across the state. The Massachusetts Clean Energy Center launched a statewide V2X grant pilot which will deploy up to 100 chargers to residential, commercial fleet, municipal, and school district customers. The grant will cover the cost of charging station procurement and installation. As part of its Medium- and Heavy-Duty Electric Vehicle Plan filed with New Jersey regulators, PSE&G expects to offer incentives for customer-side technologies, including V2X.

Figure 3. 2025 Proposed Legislation on Electric Vehicles (as of late April 2025)

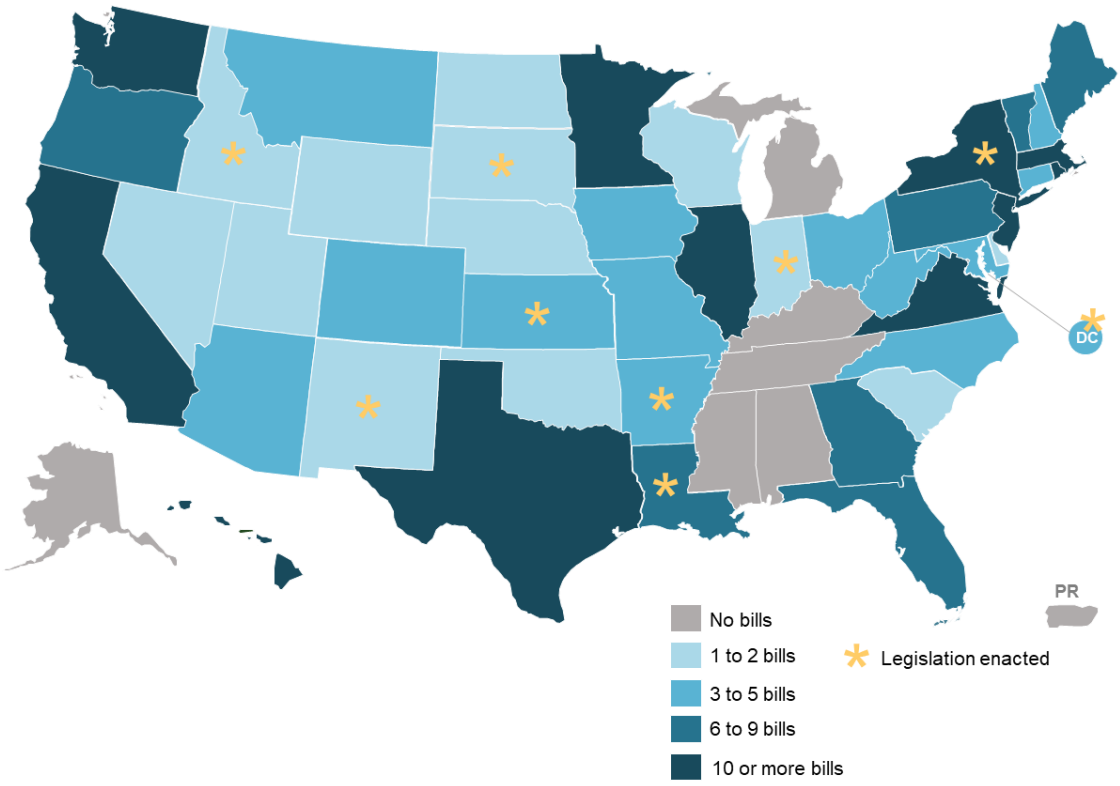
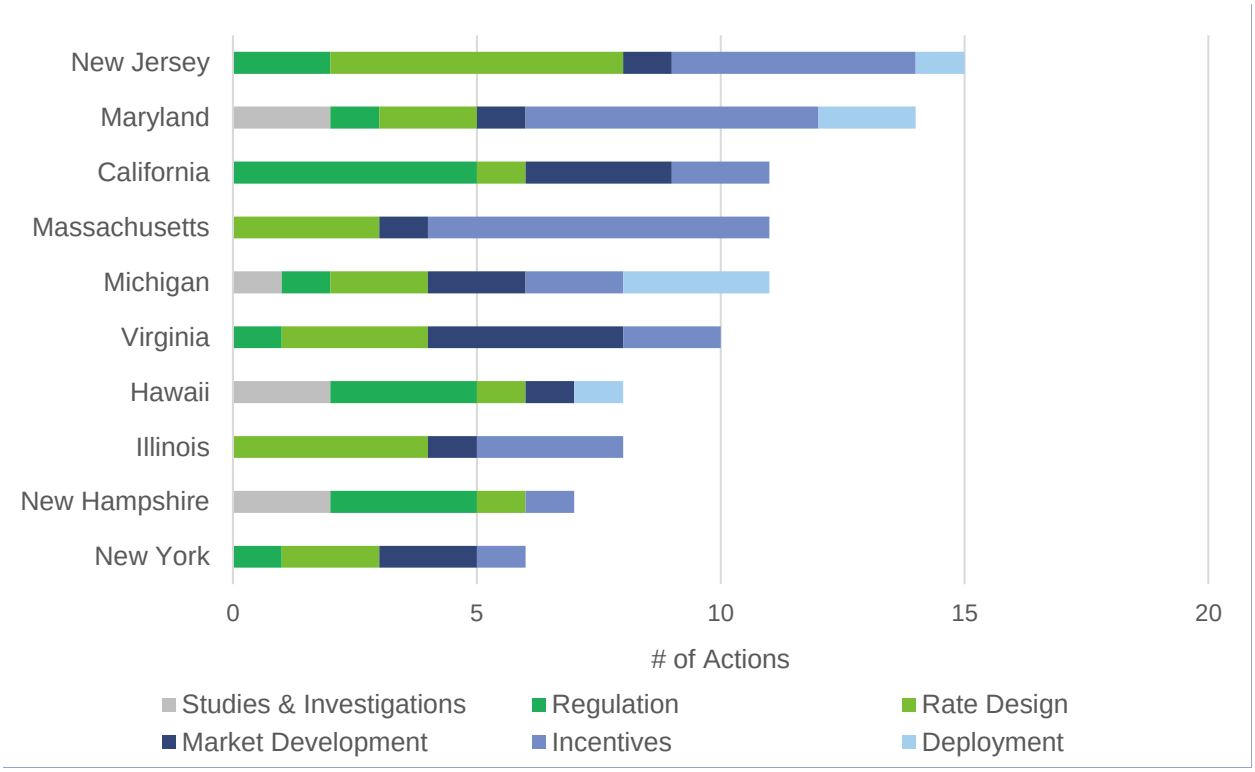


Figure 4. Most Active States of Q1 2025



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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Subscription Type	Annual Subscription	Single Report
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Single-Tech Subscription (Electric Vehicles) *(Includes 50 States of Electric Vehicles report, plus biweekly legislative & regulatory electric vehicle tracking, policy data sheets, & curated monthly email policy updates)*	$4,500	N/A
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A 20% discount is now available for non-profits and government entities. Please contact us for more information.

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We offer complimentary copies of the 50 States of Electric Vehicles, as well as the 50 States of Grid Modernization and the 50 States of Solar, to **policymakers and regulators** (limited to federal and state legislators and staffers, utility commissioners, utility commission staff, state consumer advocate office staff, and state energy office staff). Contact us to receive a complimentary copy of the most recent report.

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