

# 50

# STATES OF

# ELECTRIC VEHICLES

2025 Annual Review & Q4 2025 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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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](#).

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# 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.

### Rate Design and Managed Charging

Proposed or approved changes to investor-owned utility rate design or managed charging programs 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

## 2025 ELECTRIC VEHICLE ACTION

In 2025, 40 states plus DC and Puerto Rico took a total of 314 policy and deployment actions related to electric vehicles and charging infrastructure. Table 1 provides a summary of state and utility actions on these topics. Of the 314 actions identified, the most common were related to rate design and managed charging (86), followed by financial incentives (73), and regulation (72). Several states also took actions planning for National Electric Vehicle Infrastructure (NEVI) program funding distribution.

**Table 1. 2025 Summary of Electric Vehicle Actions**

Type of Action	# of Actions	% by Type	# of States
Rate Design and Managed Charging	86	27%	32 + PR
Financial Incentives	73	23%	24 + DC
Regulation	72	23%	30 + DC
Market Development	44	14%	19 + DC
Studies and Investigations	23	7%	15
Deployment	16	5%	10
<b>Total</b>	<b>314</b>	<b>100%</b>	<b>40 States + DC, PR</b>

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 TEN MOST ACTIVE STATES OF 2025

Ten states taking the greatest number of particularly impactful actions are noted below.

### Massachusetts

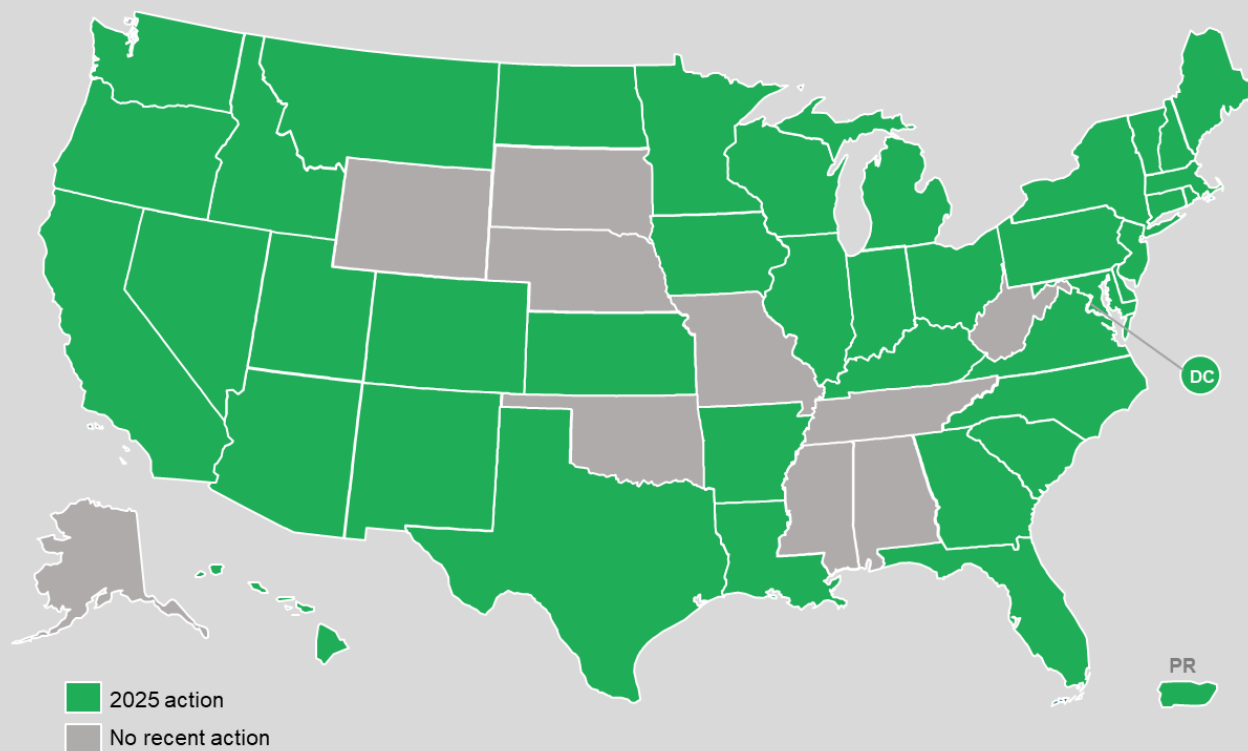
Regulators in Massachusetts approved incentives and managed charging programs for all three investor-owned utilities as part of their electric vehicle program filings. Utilities then filed the next iterations of their plans, along with new plans dedicated to pole-mounted chargers. Regulators also delayed implementation of California’s vehicle emission standards, and the Massachusetts Clean Energy Center launched a statewide vehicle-to-everything pilot targeting residential customers.

### Maryland

Utilities in Maryland proposed new virtual power plant programs, which allow bidirectional electric vehicle charging to participate; the utilities then re-filed with increased electric vehicle participation

after regulatory feedback. Regulators approved new electric school bus programs for Baltimore Gas & Electric and Potomac Edison, and adopted new vehicle-to-grid regulations, based on recommendations from the Interconnection Work Group. The Governor also signed an executive order easing compliance with vehicle emission standards.

**Figure 1. 2025 Legislative and Regulatory Action on Electric Vehicles**



## New Jersey

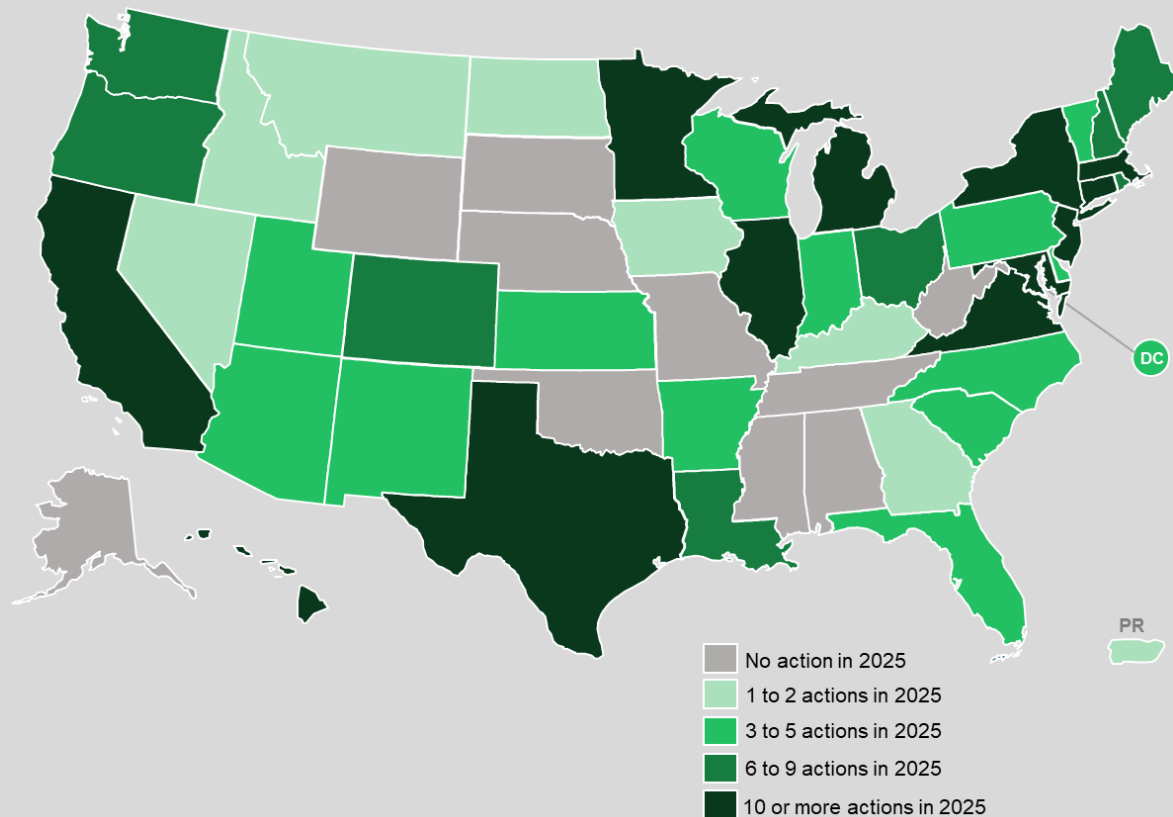
New Jersey policymakers released a zero-emission vehicle roadmap and the state's Energy Master Plan this year, both of which outline state policies and goals for electric vehicles. Utilities filed Medium- and Heavy-Duty Plans, which include incentive and managed charging programs, while the Economic Development Authority approved a new grant program for commercial fleets, funding chargers and make-ready infrastructure.

## Oregon

Oregon lawmakers implemented mandatory Vehicle Miles Traveled fees for all-electric and hybrid vehicles, starting in 2027; until then, annual registration fees will increase. Legislators also expanded the motor carrier tax to include electric vehicles, with the exact tax depending on the

vehicle weight. Regulators approved increased incentives and revised idling fees for Portland General Electric, and a new active managed charging program for PacifiCorp.

**Figure 2. 2025 Electric Vehicle Activity, by Number of Actions**



### California

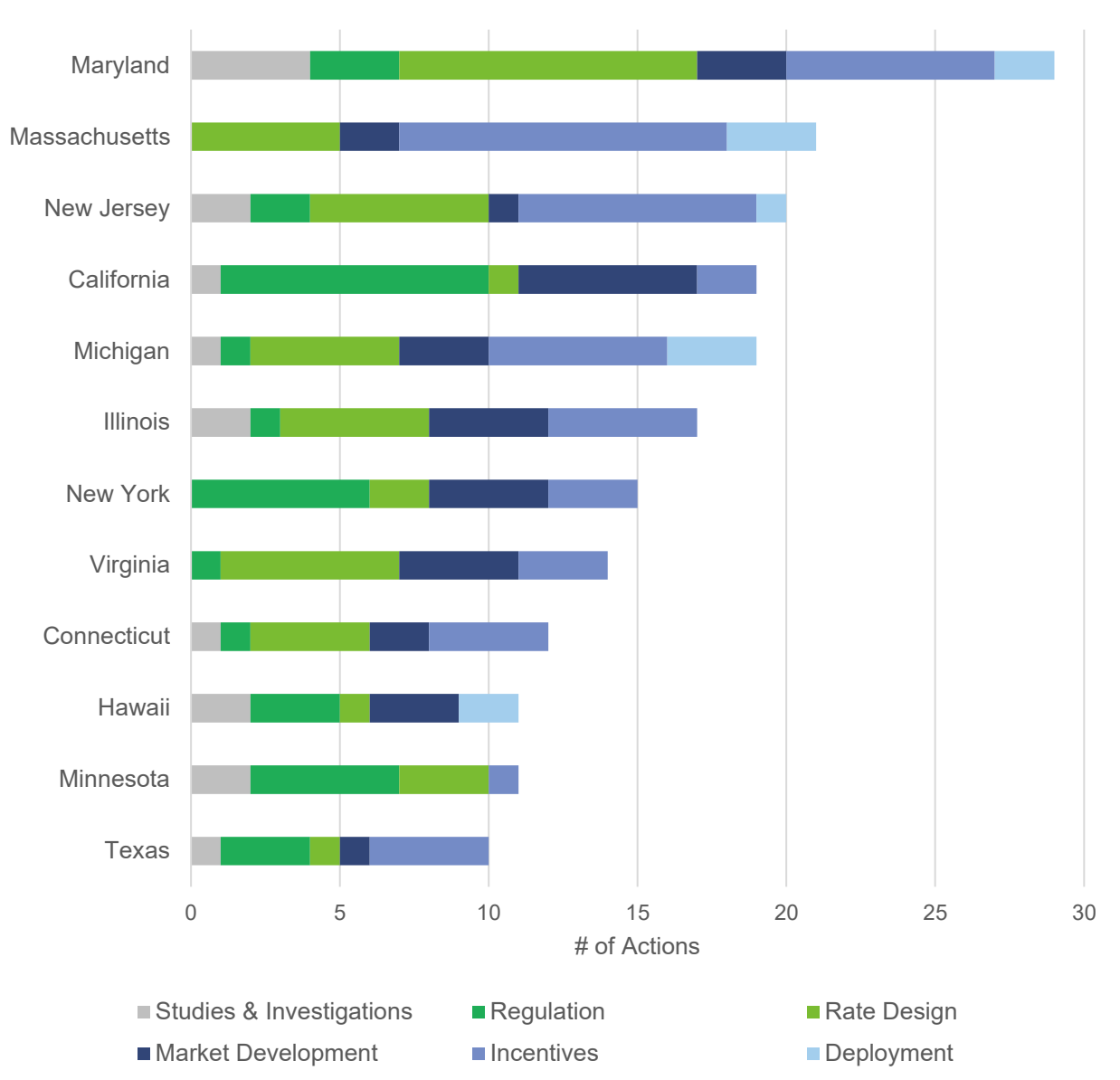
California lawmakers passed various bills related to electric vehicles. The Governor signed bills ordering local governments to develop energy plans which must include transportation electrification issues and establishing payment method requirements for public charging stations. Regulatory staff published proactive planning work products, including a corridor disaggregation methodology and modeling inputs and assumptions, while regulators adopted new rules for charging station reliability.

### Connecticut

Connecticut lawmakers imposed a budgetary cap on incentives under the state’s light-duty program, which regulators implemented along with a new incentive for multi-family site hosts. Regulators also approved a new program for medium- and heavy-duty vehicles, which includes

fleet advisory services, rates for commercial fleets, and incentives for electric school buses; the program also includes a load-shifting program to counterbalance utility/RTO time-of-use misalignment and guidelines for a future managed charging program.

**Figure 3. Most Active States of 2025, by Number of Actions**



### Minnesota

Minnesota lawmakers adopted new registration fees for electric vehicles, based on the retail price of the vehicle. They also established a new per-kWh fee for public charging and created a new working group to research electricity as a fuel vehicle. Regulators approved Minnesota Power’s new multifamily rebate pilot for make-ready infrastructure. Meanwhile, Otter Tail Power proposed a new active managed charging program for residential and farm customers.

## Michigan

Michigan regulators released their biennial demand-side management study, which recommends continued monitoring of electric vehicle adoption and charging behavior. Regulators also approved a request from Ford Motor Company, agreeing that its F-150 Lightning does not need to apply for interconnection. Indiana Michigan Power and UPPCO filed Transportation Electrification Plans, while DTE Electric received approval for a new fast charger tariff and proposed a new school bus fast charger rebate. Consumers Energy, meanwhile, proposed revised fast charger incentives.

## New York

New York regulators approved a new vehicle-to-grid queue management protocol, which the state will use for the EV Make-Ready Program and other programs. Regulators began their mid-point review of the Commercial Managed Charging Program and the Make-Ready Program. They approved an extension of the existing make-ready program through 2026, and separately approved modifications to Central Hudson's residential managed charging program. Lawmakers also passed various bills, though future action will occur in 2026.

## Illinois

Illinois lawmakers passed a wide-ranging bill which amended policies related to electric vehicle incentives, utility planning, energization, and electric vehicle participation in net metering, while also establishing new virtual power plant requirements. Regulators approved a new incentive for Commonwealth Edison to encourage electric vehicle owners to enroll in time-of-use rates, and a new residential managed charging program for Ameren.

# TOP ELECTRIC VEHICLE TRENDS OF 2025

## Revising the National Electric Vehicle Infrastructure Program

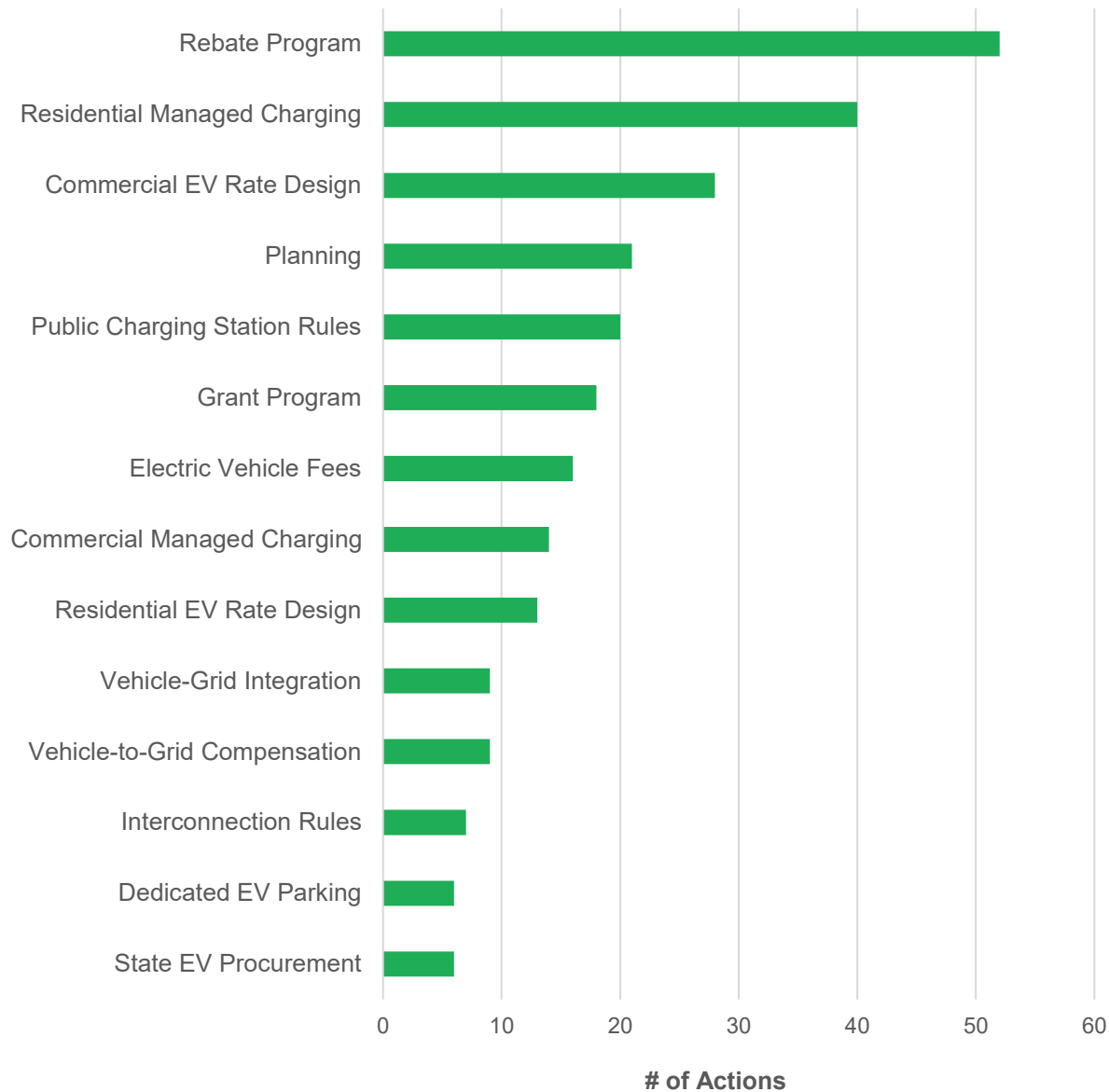
The National Electric Vehicle Infrastructure Program had a tumultuous year. After being paused by a federal executive order, multiple states petitioned in court, which resulted in those specific states regaining access to their funding. Other states regained access after the federal government released new program guidelines. States filed their FY2027 plans in the second half of the year, taking into account the new guidelines.

## Improving Residential Access to Managed Charging

State regulators approved at least 12 new managed charging programs this year targeting residential customers -- three on passive charging, six on active charging management, and three on both. Evergy Kansas' new active program is opt-in, and Efficiency Maine's new active managed charging program will target networked chargers and telematic vehicles. RI Energy added electric

vehicles to its ConnectedSolutions program, while Arizona Public Service expanded its existing data-gathering pilot to include active managed charging.

**Figure 3. Top Electric Vehicle Actions of 2025**



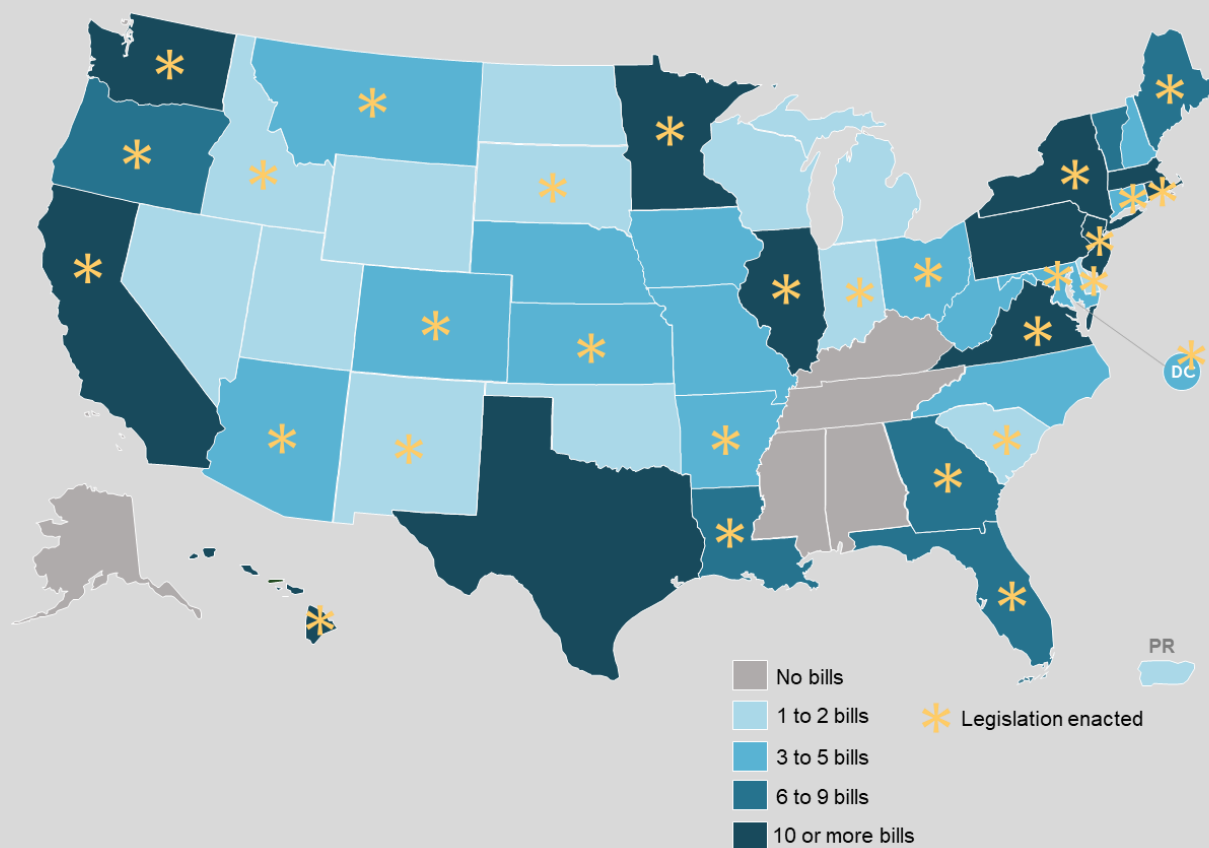
### Imposing Restrictions or Pulling Back on Electric Vehicle Mandates

Legislators considered and adopted restrictions on the ability of state and local policymakers to establish electric vehicle mandates. Idaho lawmakers prohibited requirements for charging stations, electric vehicle parking spots, and associated infrastructure within building plans. The Governor of Maryland and regulators in Massachusetts delayed compliance with Advanced Clean Cars II (ACC II) and Advanced Clean Trucks (ACT) for certain model years. Meanwhile, bills introduced in Minnesota and New Jersey would repeal ACC II and ACT.

## Developing Programs for Medium- and Heavy-Duty Vehicles

States and utilities are implementing new programs targeting medium- and heavy-duty (MHD) vehicles. Maryland regulators approved electric school bus programs for two utilities, as did their Connecticut counterparts for the Connecticut Green Bank. Connecticut regulators also created a new program targeting MHD vehicles, including incentives, advisory services, and rates. Utilities in New Jersey filed MHD Plans with new incentives and managed charging programs, while DTE Electric proposed a rebate for school bus fast chargers.

**Figure 6. Electric Vehicle Legislation Considered in 2025**



**Note:** Map includes bills that did not pass a chamber, while other figures in this report exclude these.

## Considering Regulations Addressing Vehicle-Grid Integration

Policymakers considered new rules targeting vehicle-grid integration, with regulators in Delaware and Maryland adopting new regulations specifically for vehicle-grid integration. Ford Motor Company filed requests in Colorado and Texas regarding whether its F-150 Lightning must go through interconnection procedures; Michigan regulators agreed earlier in the year that the vehicles

are exempt from interconnection. Connecticut regulators established a Bidirectional EV Working Group to discuss vehicle-to-grid under the state's storage program.

### **Integrating Electric Vehicles into Virtual Power Plant Programs**

States and utilities are integrating electric vehicles into virtual power plant (VPP) programs, expanding participation beyond battery storage systems. At least five utilities proposed VPP programs allowing some form of electric vehicle participation. Connecticut regulators ordered utilities to research adding electric vehicles to the state's energy storage VPP, and Illinois lawmakers ordered utilities to develop VPP programs which must include electric vehicles.

### **Continuing Utility Focus on Incentives for Privately-Owned Charging Infrastructure**

Utilities are continuing to focus more on incentives, with rebate programs being the top considered action type of the year (52 actions), as opposed to utility-owned infrastructure deployment. Regulators in Maryland and Massachusetts approved rebates for seven investor-owned utilities; the three in Massachusetts then filed the next iteration of their plans, with incentives for various customer types. In addition, three utilities in Michigan proposed new charging station incentives.

### **Expanding Financial Support for Line Extensions**

States and utilities are pursuing more support for line extension costs and contributions-in-aid-of-construction (CIAC). Michigan regulators ordered DTE Electric to propose a residential CIAC waiver in its next rate case, while Minnesota regulators approved a CIAC waiver for multifamily buildings under Minnesota Power's integrated distribution planning. The New York Senate passed a bill ordering utilities to file new line extension tariffs.

### **Encouraging Fleet Electrification Through Targeted Incentives and Rates**

More utilities are encouraging fleets to transition to electric vehicles through incentives and electric vehicle rates. Superior Water Light & Power proposed a new time-of-use tariff specifically for commercial fleet charging, while UPPCO made outreach to fleets a key component of its Transportation Electrification Plan. Meanwhile in Massachusetts, National Grid proposed an enrollment incentive for fleet chargers enrolling in its ConnectedSolutions Program, and Eversource proposed a new incentive for medium- and heavy-duty fleets.

### **Implementing New Rates for Commercial Electric Vehicle Charging**

Commercial rate design took the third spot in overall action this year, with 28 actions considering commercial rates. SWEPCO proposed a public charging rider with a ratcheted demand charge, and Superior Water, Light & Power proposed two new tariffs – one for public charging, one for commercial fleets. In addition, Florida regulators approved making two general service rider pilots permanent for Florida Power & Light, while Connecticut regulators approved two new rates targeting medium- and heavy-duty customers for its utilities.

## Q4 2025 ELECTRIC VEHICLE ACTION

In Q4 2025, 34 states took a total of 159 actions related to electric vehicles. Table 2 provides a summary of state and utility actions occurring during Q4 2025. Of the actions cataloged, the most common were related to rate design and managed charging (55), followed by financial incentives (41), and regulation (26). Several states also took actions planning for National Electric Vehicle Infrastructure (NEVI) program funding distribution.

**Table 2. Q4 2025 Summary of Electric Vehicle Actions**

Type of Action	# of Actions	% by Type	# of States
Rate Design and Managed Charging	55	35%	25
Financial Incentives	41	26%	16
Regulation	26	16%	16
Market Development	17	11%	8
Studies and Investigations	12	8%	7
Deployment	8	5%	6
<b>Total</b>	<b>159</b>	<b>100%</b>	<b>34 States</b>

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 Q4 2025

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

### **Massachusetts Utilities Receive Approval for and File New Electric Vehicle Plans**

The Massachusetts Department of Public Utilities approved electric vehicle programs for Eversource (Phase II), National Grid (III), and Unitil (III), which include modifications to existing DCFC rebates and residential managed charging programs. Eversource (III) and National Grid (IV) also filed the next iterations of their plans, with more changes to DCFC incentives and new commercial managed charging programs. The three utilities also filed plans targeting pole-mounted charging stations.

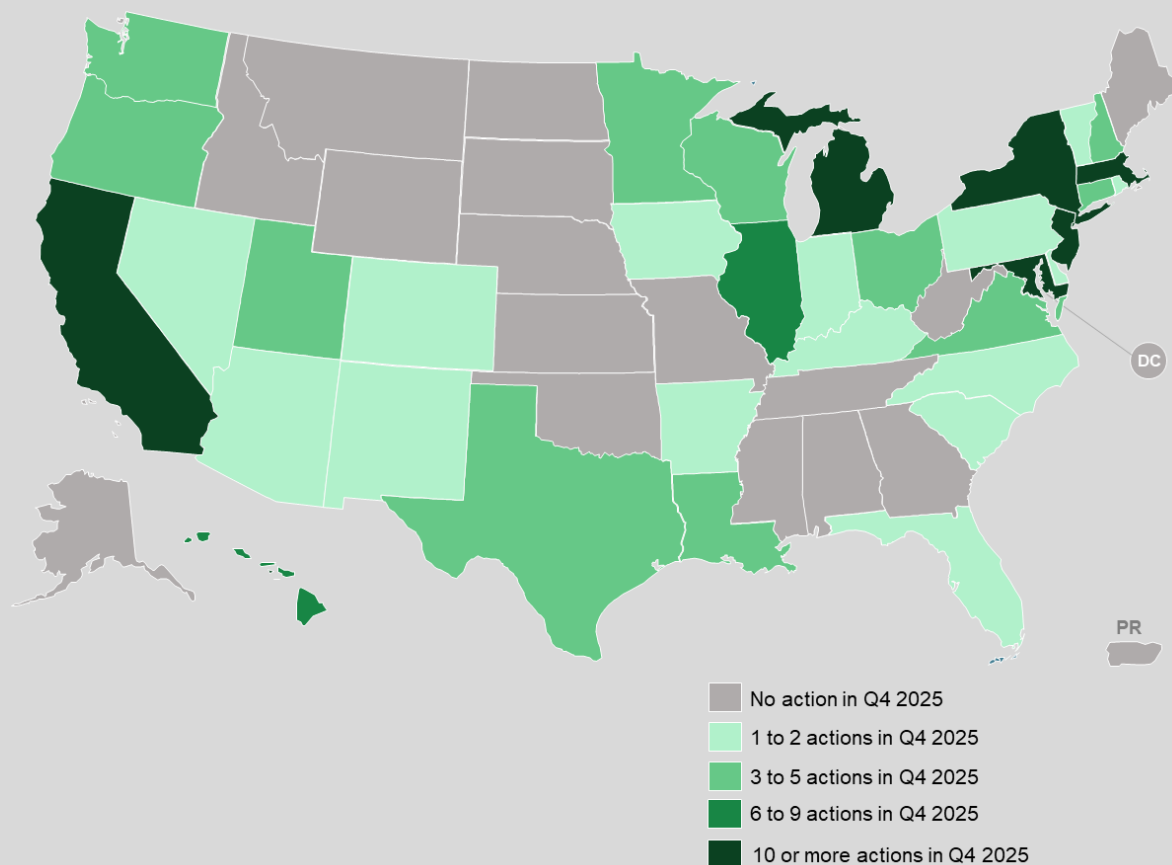
### **New Jersey Policymakers Release Zero-Emission Vehicle Roadmap and Open Take Charge Program**

The Governor of New Jersey released the state’s Zero-Emission Vehicle Roadmap and Energy Master Plan, both of which outline the state’s electric vehicle policies and goals. The New Jersey Economic Development Authority, meanwhile, approved the new Take Charge grant program targeting commercial fleets; grants will cover labor, materials, equipment, and make-ready infrastructure for new charging stations.

## Connecticut Regulators Revamp Electric Vehicle Charging Program

The Connecticut Public Utilities Regulatory Authority approved Year 5 of the state's Electric Vehicle Charging Program, with significant revisions compared to Year 4. Year 5 will integrate changes from a 2025 bill implementing a cap on program incentives, leading to a revised incentive structure and limiting incentives to low-income customers or disadvantaged communities. Additionally, the program will now include a new site host incentive for multi-unit dwellings.

**Figure 9. Q4 2025 State and Utility Action on Electric Vehicles**



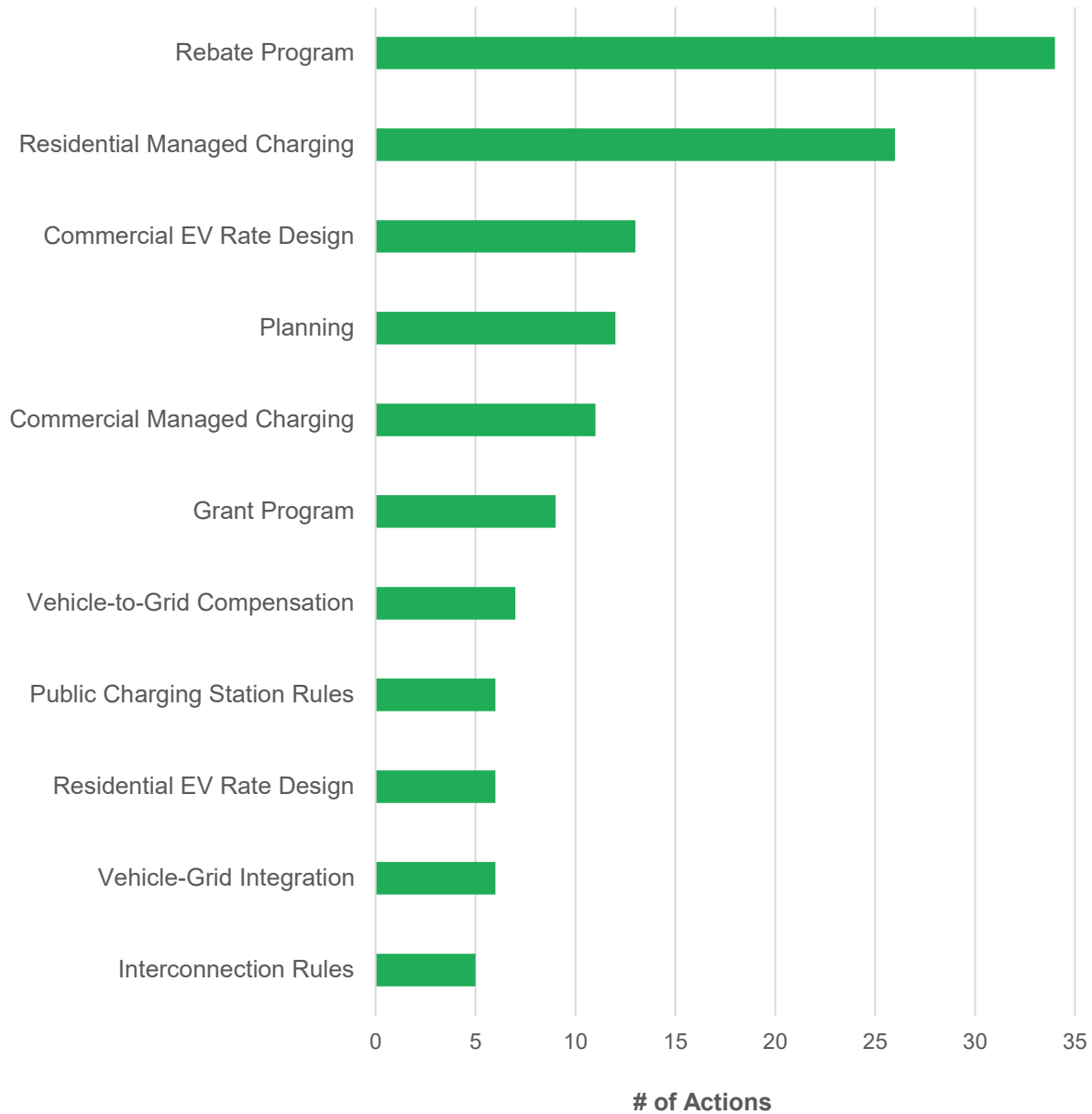
## Illinois Lawmakers Revise EV Planning and Policies

The Illinois General Assembly passed a landmark energy bill, signed by the Governor in January 2026, which made various changes to electric vehicle policies. The bill ends utility-led transportation electrification planning and incentives, shifting it to a state agency; however, utilities must now incorporate electric vehicle measures into their integrated grid planning. The bill also integrates electric vehicles into net metering and virtual power plant programs.

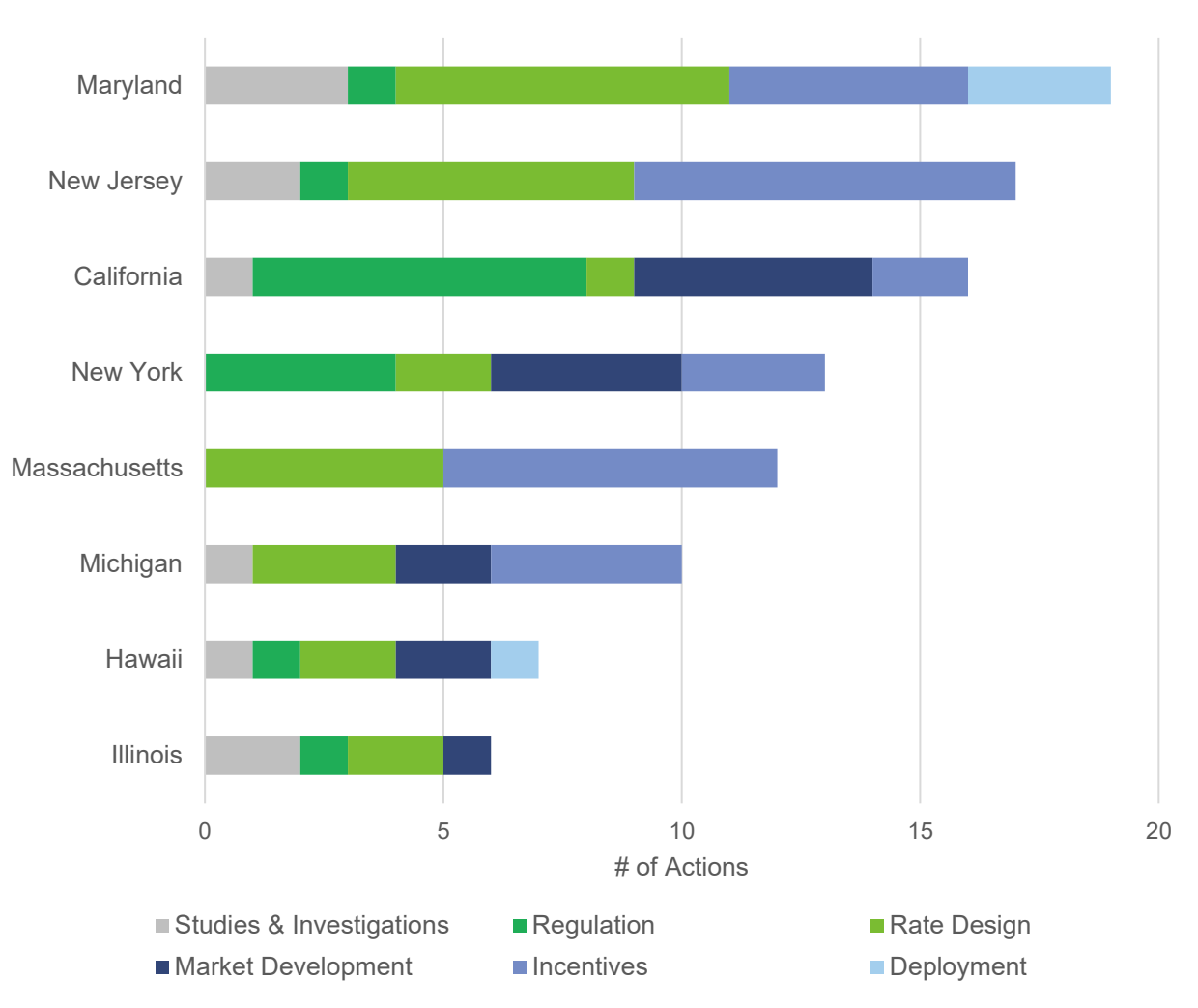
## Arizona Corporation Commission Approves Arizona Public Service Transportation Electrification Plan

The Arizona Corporation Commission approved Arizona Public Service’s 2024 transportation electrification implementation plan, which adds active managed charging to its residential charging data-sharing program, increasing the overarching program to five times its current size. The plan also includes new make-ready incentives for commercial customers.

**Figure 10.** Top Electric Vehicle Actions of Q4 2025



**Figure 12. Most Active States of Q4 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

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