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|-------------------------|---|
| Docket Number: | 20-MISC-01 |
| Project Title: | 2020 Miscellaneous Proceedings. |
| TN #: | 236551 |
| Document Title: | Presentation - Panel 1 Ed Burgess VGIC CEC V2B Workshop |
| Description: | N/A |
| Filer: | Ben Wender |
| Organization: | VGIC |
| Submitter Role: | Public |
| Submission Date: | 2/1/2021 4:46:32 PM |
| Docketed Date: | 2/1/2021 |



Customer Demand and Market Opportunity for VGI

CEC V2B Workshop
January 25, 2021

About The VGIC

Vehicle-Grid Integration Council (VGIC) is a national 501(c)(6) membership-based advocacy group committed to advancing the role of electric vehicles and vehicle-grid integration through policy development, education, outreach, and research.

The mission of VGIC is to support the transition to a decarbonized transportation and electric sector by ensuring the value from EV deployments and flexible EV charging and discharging is recognized and compensated in support of achieving a more reliable, affordable, and efficient electric grid.

The logo for Honda, featuring the word "HONDA" in a bold, red, sans-serif font.The FCA logo, featuring the letters "FCA" in a blue, sans-serif font, with "FIAT CHRYSLER AUTOMOBILES" in a smaller, blue, sans-serif font below it.The enel x logo, featuring the word "enel" in a purple, lowercase, sans-serif font and a purple "x" symbol to its right.The Nissan logo, featuring the word "NISSAN" in a bold, black, sans-serif font, with "GROUP OF NORTH AMERICA" in a smaller, black, sans-serif font below it.The Toyota logo, featuring the word "TOYOTA" in a bold, red, sans-serif font.The Mobility House logo, featuring three black chevrons pointing right above the text "THE MOBILITY HOUSE" in a black, sans-serif font.The Nuvve logo, featuring the word "NUVVE" in a green, sans-serif font with a stylized "V" that has a checkmark-like shape inside it.The Fermata Energy logo, featuring a red square with white horizontal lines to the left of the text "FERMATTA ENERGY" in a grey, sans-serif font.The OssiaCO logo, featuring a blue wavy line above the text "OSSIACO" in a blue, sans-serif font.The Connect California logo, featuring a white outline of the state of California above the text "CONNECT CALIFORNIA" and "CLEAN BACKUP POWER SYSTEMS" in a small, black, sans-serif font.

Customer Demand and Market Opportunity

- Evidence of growing demand for new backup power solutions
 - Traditional backup power solutions
 - V2B solutions
- Innovation occurring among V2B-related technology providers
- Recent OEM announcements of bidirectional capability
- EVSEs also picking up steam for V2B

Market Opportunities in California

- **LCFS Funding (CPUC Decision 20-12-027):** up to 20% of holdback funds can be used for resilience purposes.
- **VGI Pilots (CPUC Decision 20-12-029):** funding set aside for VGI Pilots.
- **Microgrids: Utility RFPs for Temporary Generation** in advance of 2021 fire season.
- **Some OEMs view the PSPS challenge as a real opportunity** and developing product plans accordingly.

Barriers

- V2X AC continues to be a challenge due to interconnection (upcoming pilots may help). No real barrier with V2X DC.
- Continued need for level playing field with other forms of backup power in existing/ongoing funding opportunities.
- OEM product plans timelines not necessarily aligned with acute fire season needs.
- Low customer awareness of new value proposition for EVs.
- Remaining uncertainty about use of utility administered funds (LCFS and VGI Pilots).



Thank You!

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