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Electrify America:
Integrated Energy Policy Report Workshop

06.2020

Introducing

Electrify America

Electrify America LLC, the largest open DC fast charging network in the U.S., is investing $2 billion over 10 years in Zero Emission Vehicle (ZEV) infrastructure, education and access. The investment will enable millions of Americans to discover the benefits of electric driving and support the build-out of a nationwide network of workplace, community and highway chargers that are convenient and reliable.

Electrify America expects to install or have under development approximately 800 public charging stations with about 3,500 chargers by December 2021. It is also engaged in marketing efforts to raise consumer awareness of electric vehicles.

Electrify America has more than 2,000 chargers at 438 stations, with plans to complete ~800 stations by end of 2021.

2021
45 states + DC
29 large metros
800 Stations
3,500+ DC Fast Chargers

Station spacing:
- Average: 70 miles
- Maximum: 120 miles

Chargers per site:
- Average: 5
- Minimum: 3-4
- Maximum: 10

Charging speed
- 3 to 20 miles per minute

The majority of "Coming Soon" stations are under construction or construction complete and awaiting utility connection.

As of 2020, 96% of Americans live within 120 miles of an Electrify America station.

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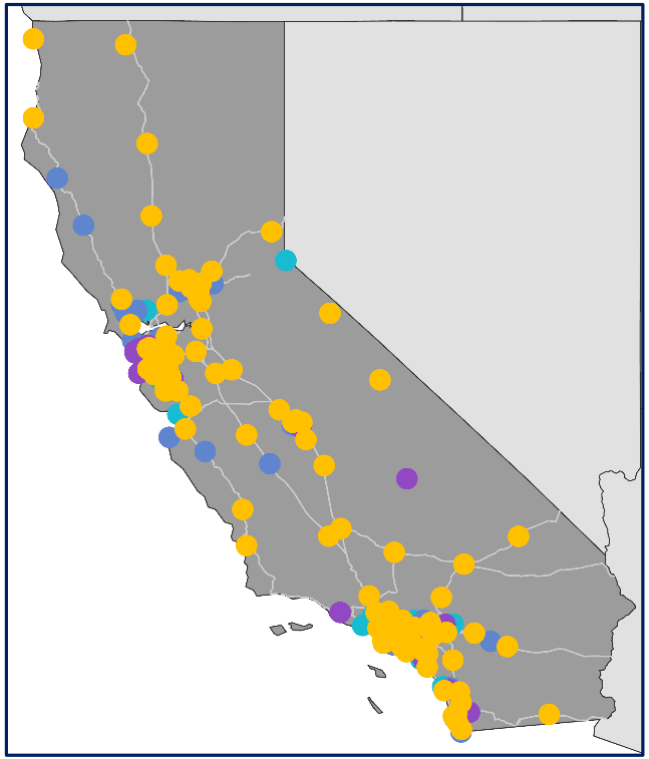
At the end of Q1 2020, Electrify America had 109 stations commissioned across California.



DCFC Infrastructure as of Q1 2020

Sites with Permits Submitted	182	50% DAC/LIC
Sites with Permits Complete/ in Construction	162	51% DAC/LIC
Sites Construction Complete	133	53% DAC/LIC
Sites Commissioned	109	52% DAC/LIC

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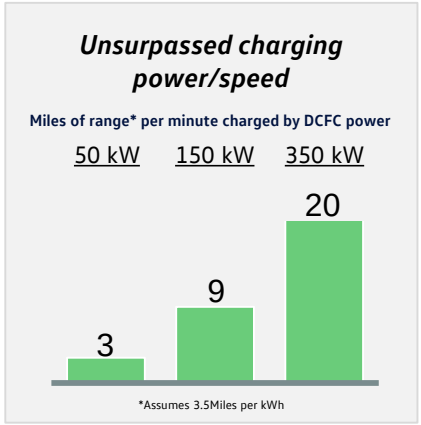
Electrify America chargers provide CCS charging capable of 1,000 volts at 350 Amps to deliver 350 kW of high power charging



Charge power up to 350kW

Liquid-cooled cables

CCS CHAdeMO Dual connector

15 inch touch display

Electrify America also has a commercial grade Level 2 (AC) solution for long dwell times

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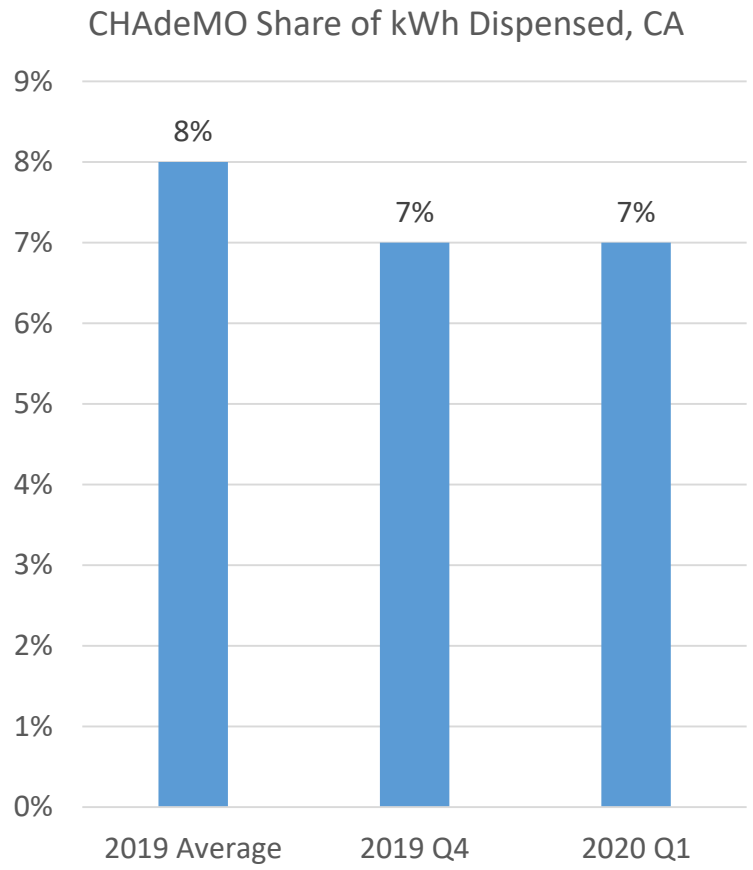
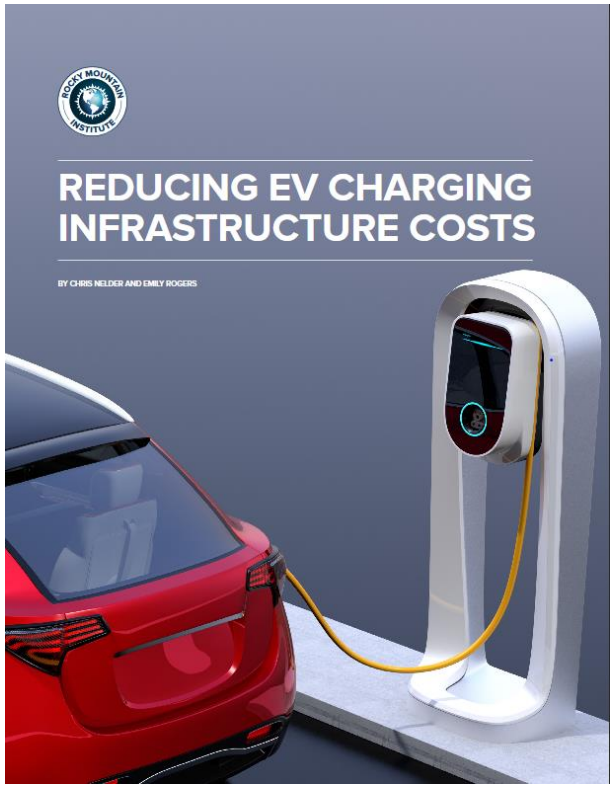
Non-proprietary Standards

- Consensus growing around CCS Standard: GM, Ford, FCA, BMW, VW, Daimler, Kia, Hyundai, Honda, Lucid, Porsche, Audi, Proterra, Fisker, Harley-Davidson all use CCS
- CHAdeMO standard used by Nissan Alliance
- CHAdeMO accounts for a small and declining fraction of charging dispensed at EA stations



Soft costs contribute significantly to overall project costs



A 2020 Rocky Mountain Institute study found that soft costs are "**some of the largest and most unpredictable costs that developers of charging networks encounter.**"

Key contributors to soft costs:

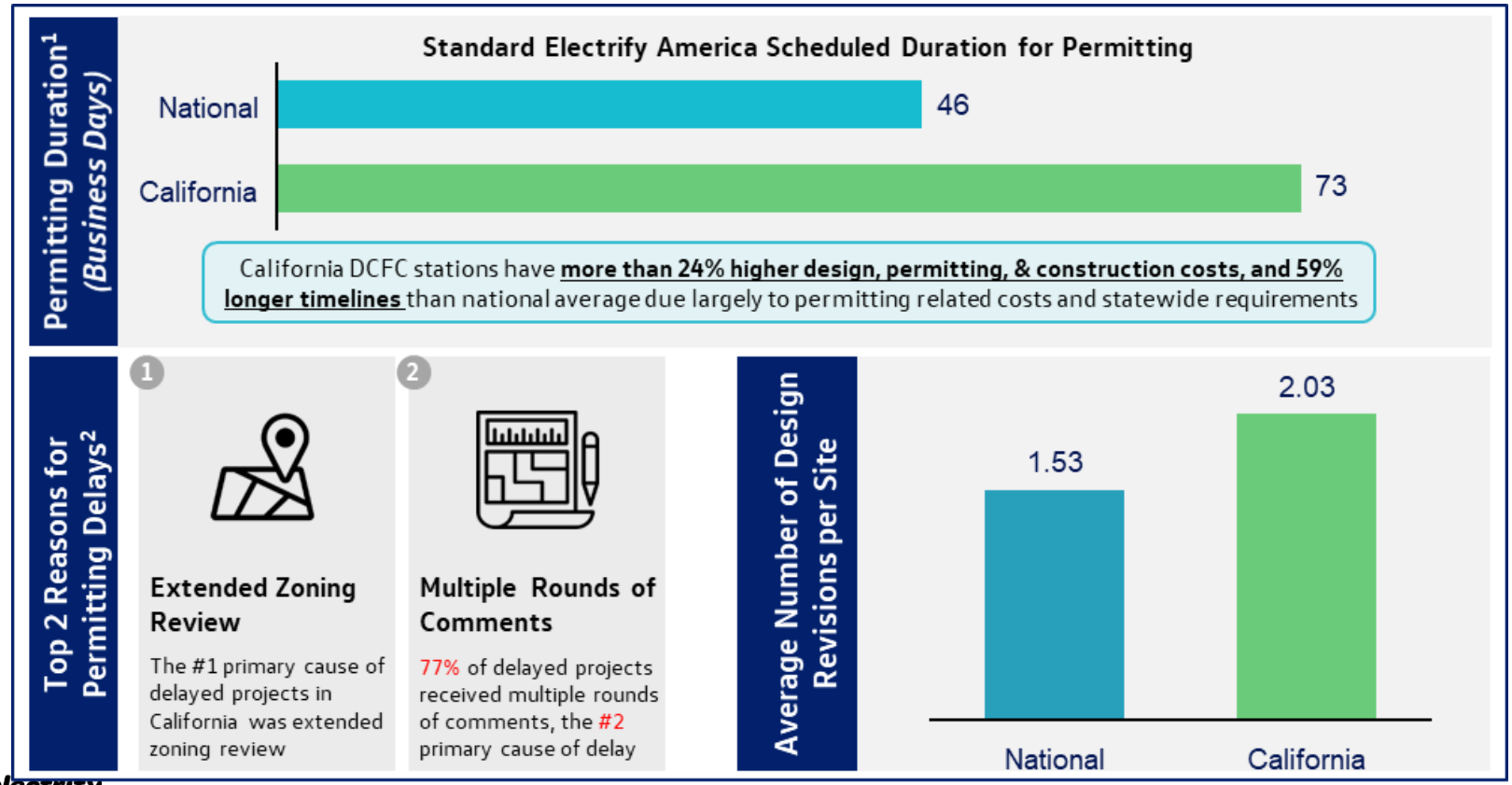
- Permitting delays
- Utility easement and interconnection delays
- Demand charges

California regulations also increase costs:

- California Building Code requirements
- Division of Measurement Standards charger requirements
- Open Access reporting requirements

https://rmi.org/insight/reducing-ev-charging-infrastructure-costs/

Permitting in California presents a number of challenges; costs and standard durations for projects much higher than National



[1]*Duration measured in business days.*
[2]*Sample size of 73 projects in California with permitting durations of 70+ days*

Investment Best Practices

- **Real Estate and Permitting:** Focusing on Project Development Progress
  - Increases speed and project success rate
- **Technology**
  - Speed/Power and Standardization
  - Staying ahead with Future-proofing
- **Certainty**
  - Over-subscribed programs create uncertainty
  - Increased application requirements create certainty
  - Rebates create certainty
- **Timely, Expeditious Action**
  - Processing times matter
  - Wait lists: Fast moving industries cannot wait on a list.

Companies rarely die from moving too fast, and they frequently die from moving too slowly.

- Reed Hastings, Netflix Inc.

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Thank you!