NARUC Winter Policy Summit
February 8–11, 2026
Washington, D.C.

How Electric Vehicles Can Support Load Growth and Affordability

Sunday, February 8th 2:00-5:00pm

Organized by Danielle Sass Byrnett & Margerie Snider, NARUC Center for Partnerships & Innovation and Garrett Fitzgerald & Brittany Blair, SEPA. Thanks to U.S. Department of Energy for their support.

NARUC Winter Policy Summit
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Hon. Katherine Peretick

Michigan Public Service Commission

Chair, NARUC EV State Working Group

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Workshop Objectives

- Identify opportunities and barriers to the increased use of EVs as flexible resources
- Highlight real-world examples of utilizing EVs for flexibility
- Develop key takeaways informed through participant discussions

Output: Top 10 Actions State PUCs Can Take to Enable Flexibility

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Agenda

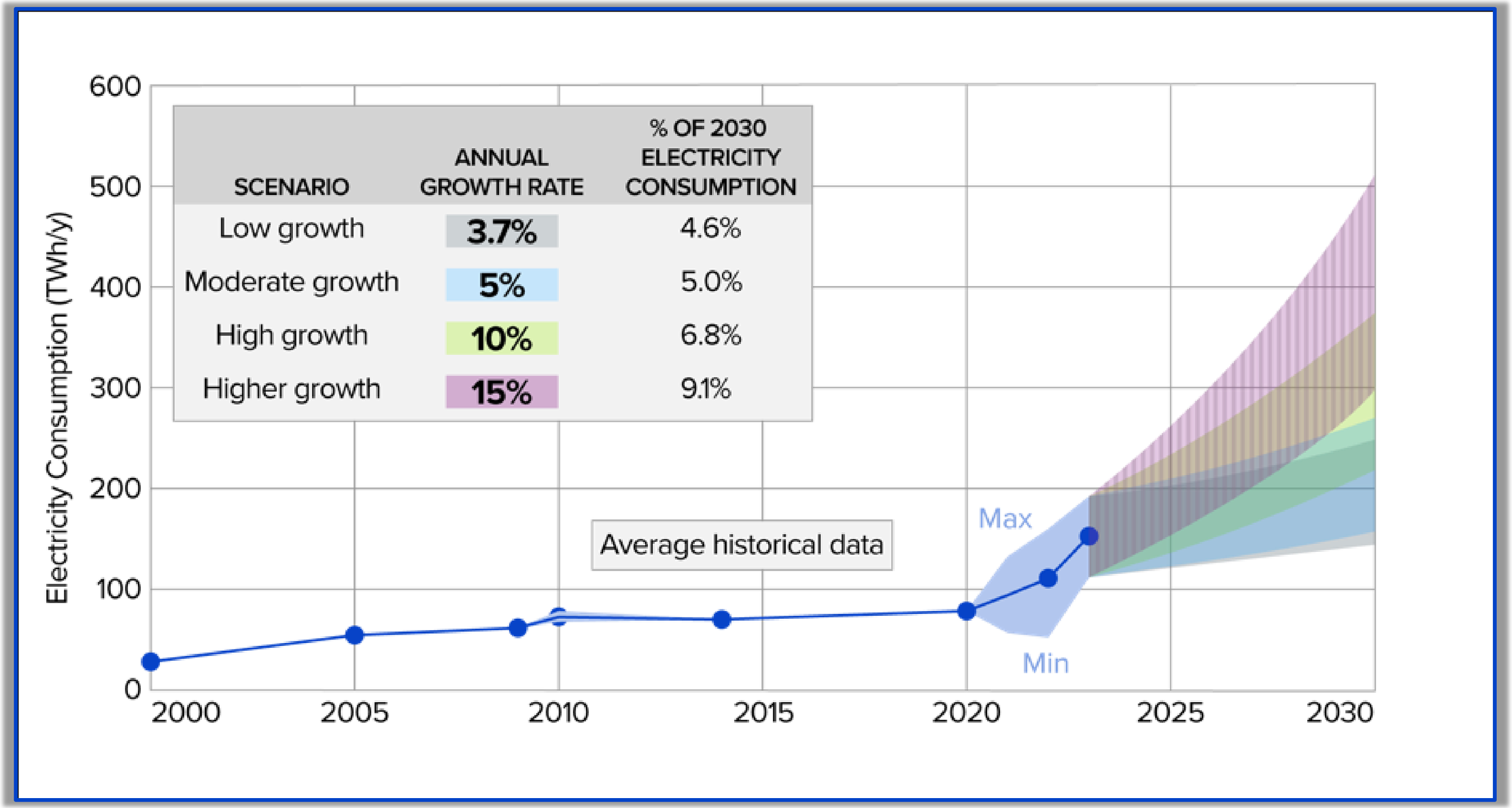
Time	Description
2:00 – 2:20 PM	**Welcome & Setting the Stage**
2:20 – 2:50 PM	**Panel 1: Flexibility from Commercial Fleets**
2:50 – 3:15 PM	**Table Discussions: Actions PUCs Can Take to Support Flexibility**
3:15 – 3:25 PM	Break
3:25 – 3:55 PM	**Panel 2: Flexibility from Residential Vehicles**
3:55 – 4:10 PM	**Table Discussions: Actions PUCs Can Take to Support Flexibility**
4:10 – 4:40 PM	**Panel 3: Including All Customers**
4:40 – 4:55 PM	**Room Discussion: Actions PUCs Can Take to Include All Customers**
4:55 – 5:00 PM	**Wrap Up & Adjourn**

EV Support for Load Growth & Affordability

David Porter
Vice President, Electrification & Sustainability Energy Strategy

NARUC
Winter Policy Summit
February 8, 2026

U.S. Data Center Power Demand Growth

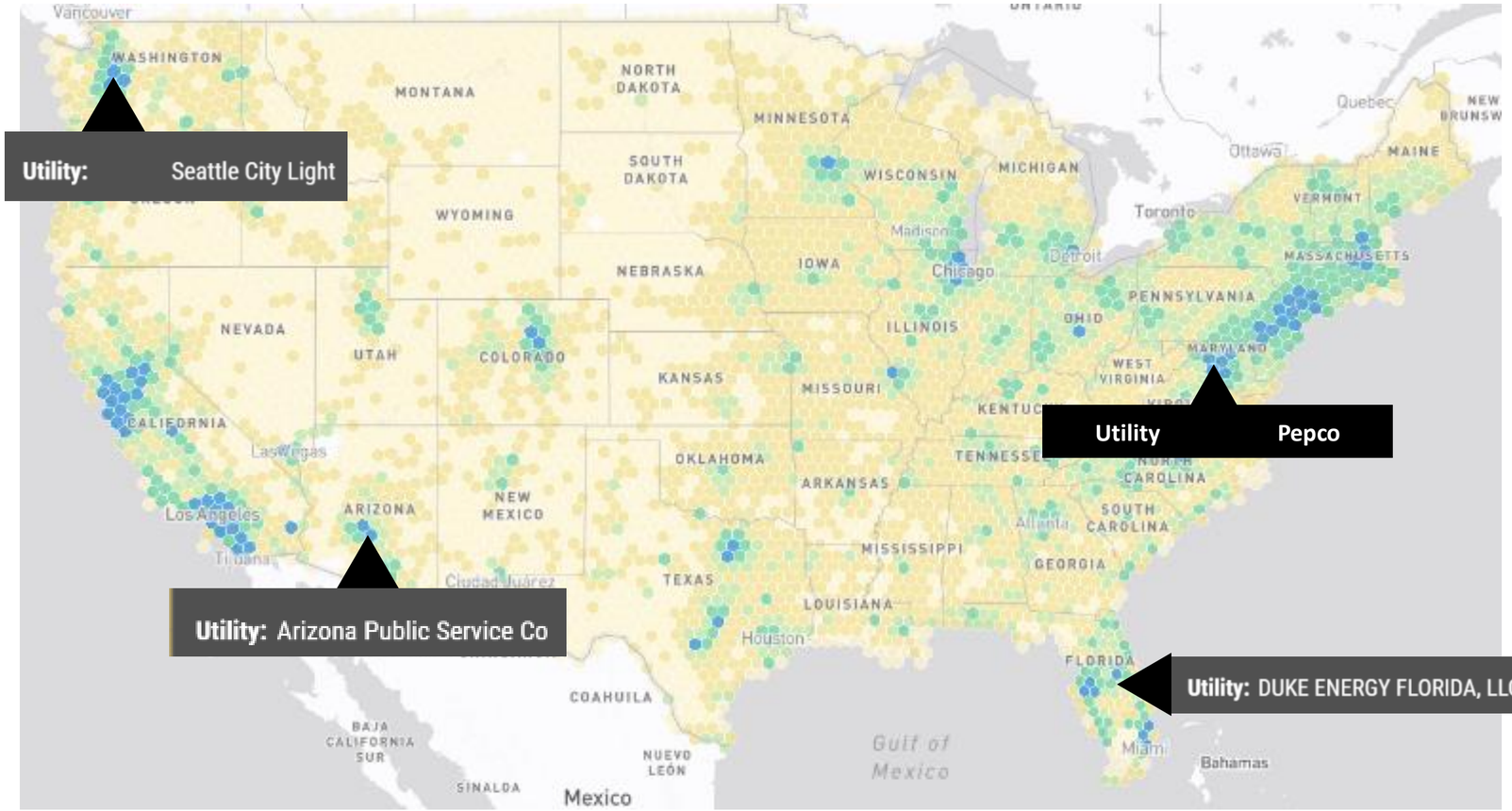


Source: EPRI Technology Innovation, *Powering Intelligence*, May 2024

Publicly-available and Interactive Load Map

(Down to Hex8 Resolution = 0.28 mi^2)

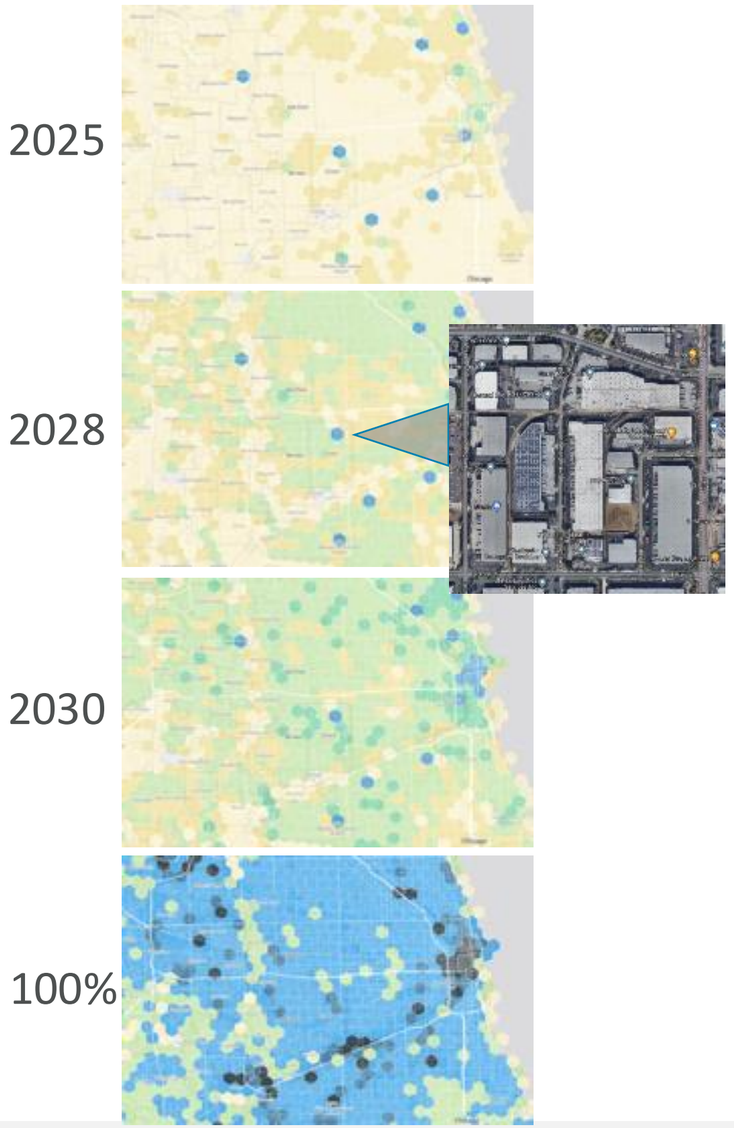
eRoadMAP | When and where loads are likely to appear on the grid



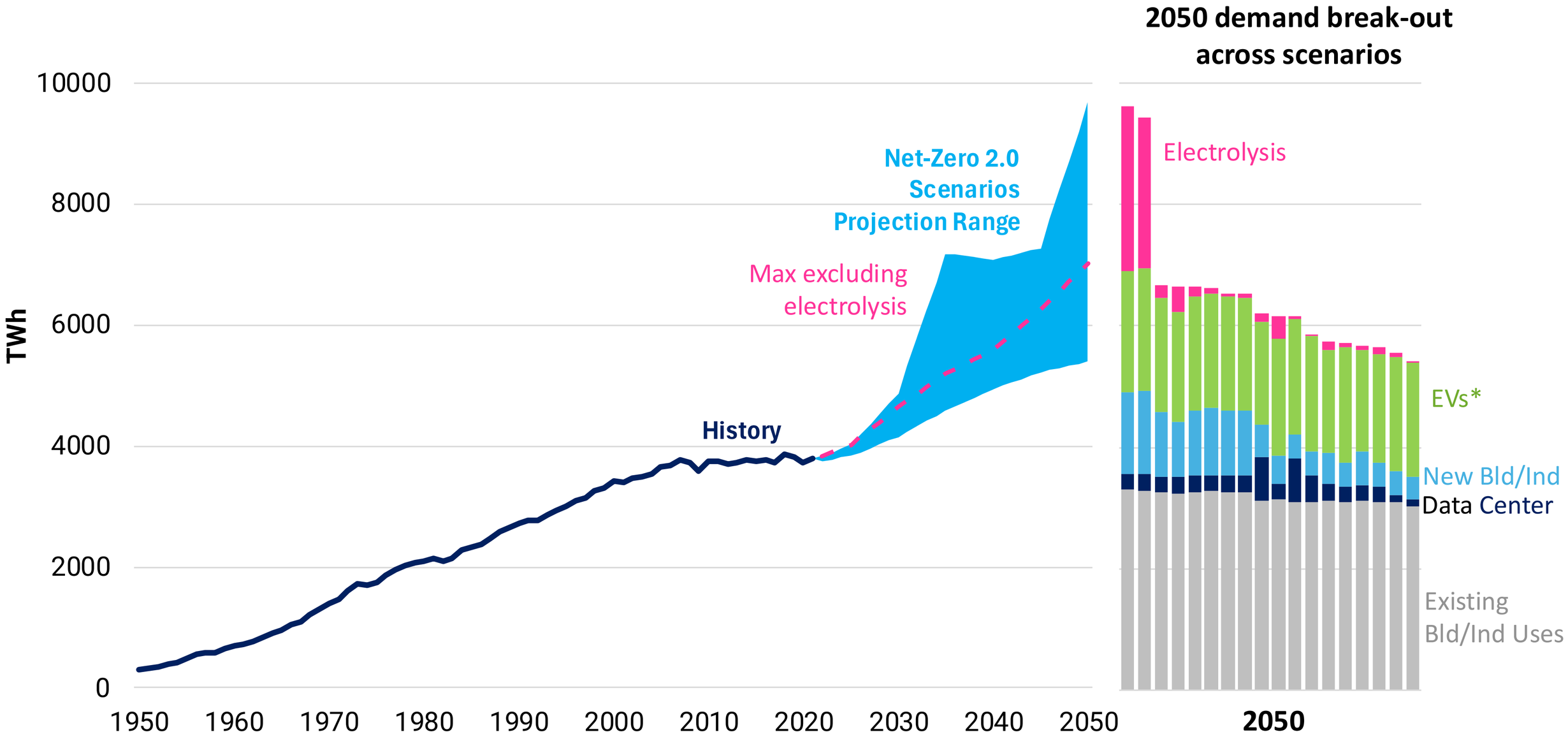
https://eroadmap.epri.com/

EV Loads Over Time

(Chicago area)



Electricity Demand Grows in All Scenarios

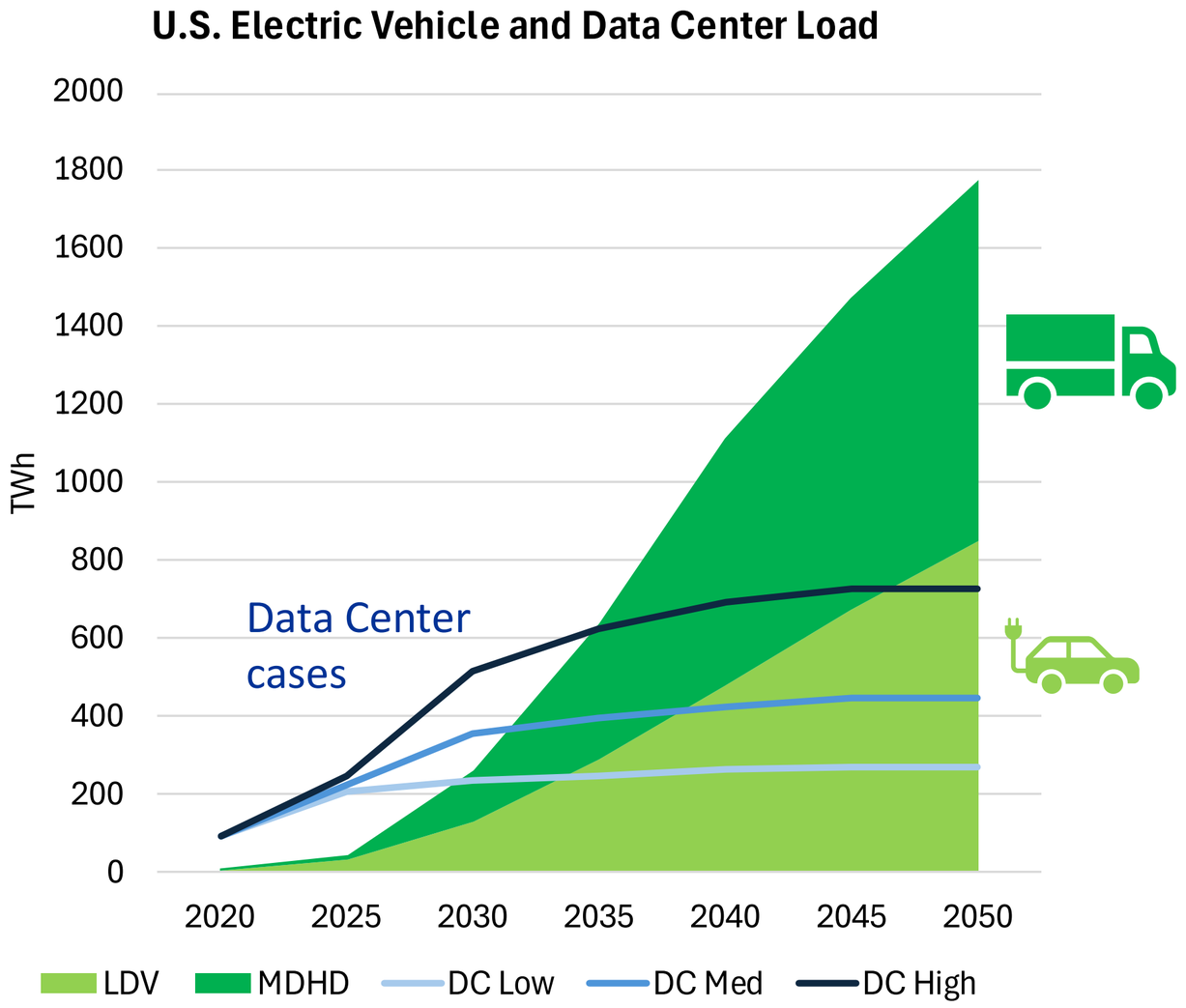


Source: LCRI Net-Zero Scenarios 2.0 Report, lcri-netzero.epri.com

** Does not reflect full range of uncertainty for EV adoption and efficiency. See EPRI report Valuing Improvements in EV Efficiency for more details.*

Emerging Loads: Data Centers & Electric Transportation

- DC load larger now, growing faster than EV load
- Ceiling is (likely) higher for EV load in the long-run
- Significant uncertainty around projections – timing is key factor



Data center scenarios based on Powering Data Centers report

Vehicle load based on current US-REGEN Reference scenario

Current State of EV Managed Charging

Option 1

V1G
(One Way Power Flow)
~23.5 % / ~1.2 million EVs

- **Behavioral Load Shaping (Passive)**
- **Utility Controlled Load Shaping (Active)**

Option 2

V2X
(Two Way Power Flow)
<<0.01% / < 600 of EVs

- **V2H (Home)**
- **V2B (Building)**
- **V2G (Grid)**

Transportation Electrification is Crucial to Affordability

Key challenges to ensure success

01 **Operational costs & data exchange**

02 **Scalability/standardization**

03 **Utility operations & planning confidence**

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Session 1: Flexibility from Commercial Fleets

Moderator:

Hon. Milt Doumit, Washington UTC and Vice Chair, NARUC EV State Working Group

Speakers:

Rachel Aland, Transportation Director, ACEEE

Bryan Zulberti, Regional Interconnection Account Manager, Duke Energy

How Electric Vehicles Can Support Load Growth and Affordability: Flexibility for Commercial Fleets

Rachel Aland

February 8, 2026

ACEEE
Smart Energy. Clean Planet. Better Lives.

About ACEEE:

The American Council for an Energy-Efficient Economy (ACEEE), is a nonprofit research organization that develops policies to reduce energy waste and combat climate change. Its independent analysis advances investments, programs, and behaviors that use energy more effectively and help build an equitable clean energy future.

Learn more at aceee.org

ACEEE

Smart Energy. Clean Planet. Better Lives.

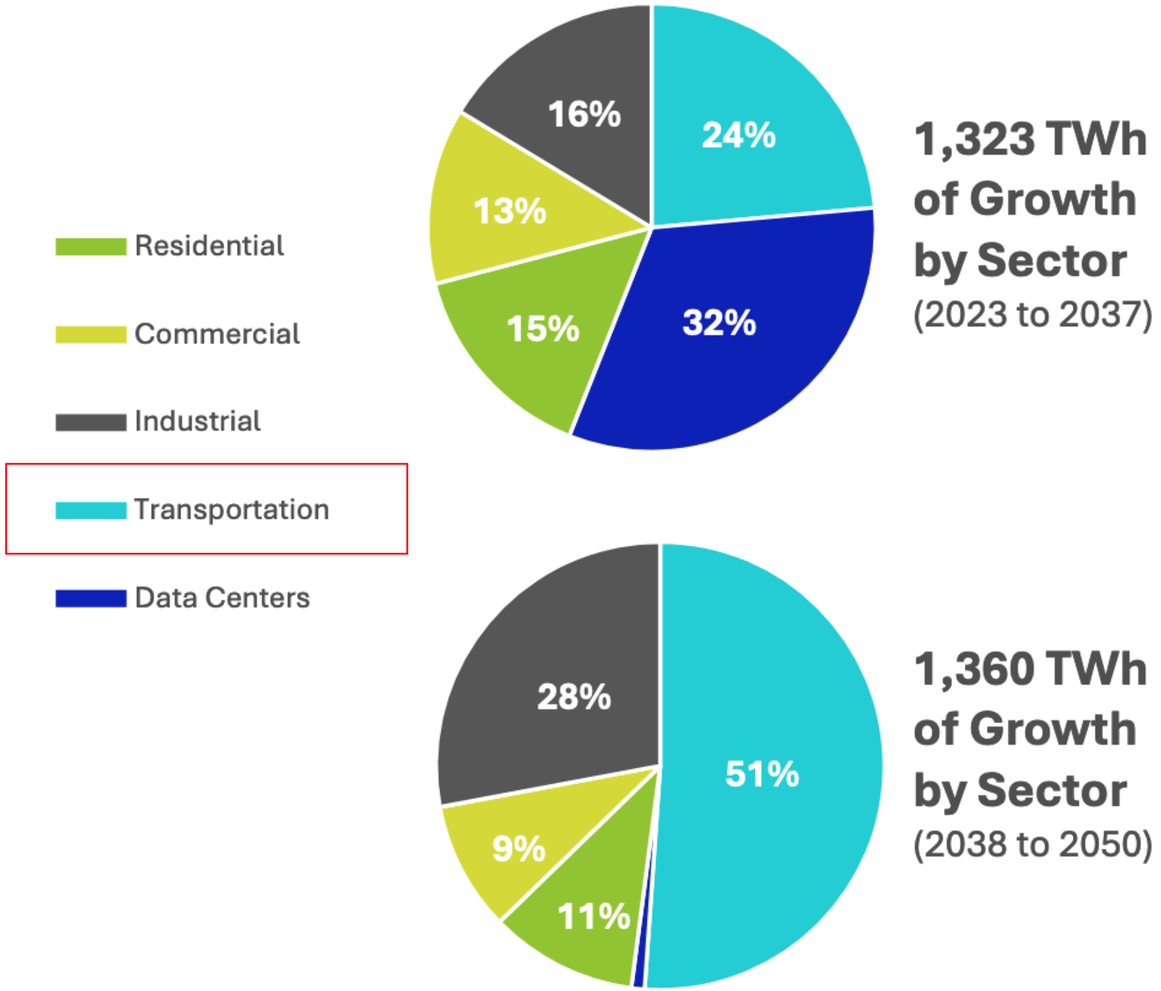
Rachel Aland, Transportation Director, ACEEE

Rachel Aland leads ACEEE's Transportation Program. In this role she oversees transportation-related research and the development of policy priorities focused on transforming freight and passenger transportation systems to be more efficient, sustainable, and equitable.

Why Commercial Fleets Matter

- Transportation represents an entirely **new source of load** growth in new locations.
- Though the vast majority of total load will be personal vehicles, **truck demand will be concentrated** and will have a higher percentage of fast charging sites.
- Fleets are an **ideal customer for managed charging and vehicle to grid** programs which help support grid resiliency and reduce distribution costs.

U.S. Net Electricity Consumption Projections

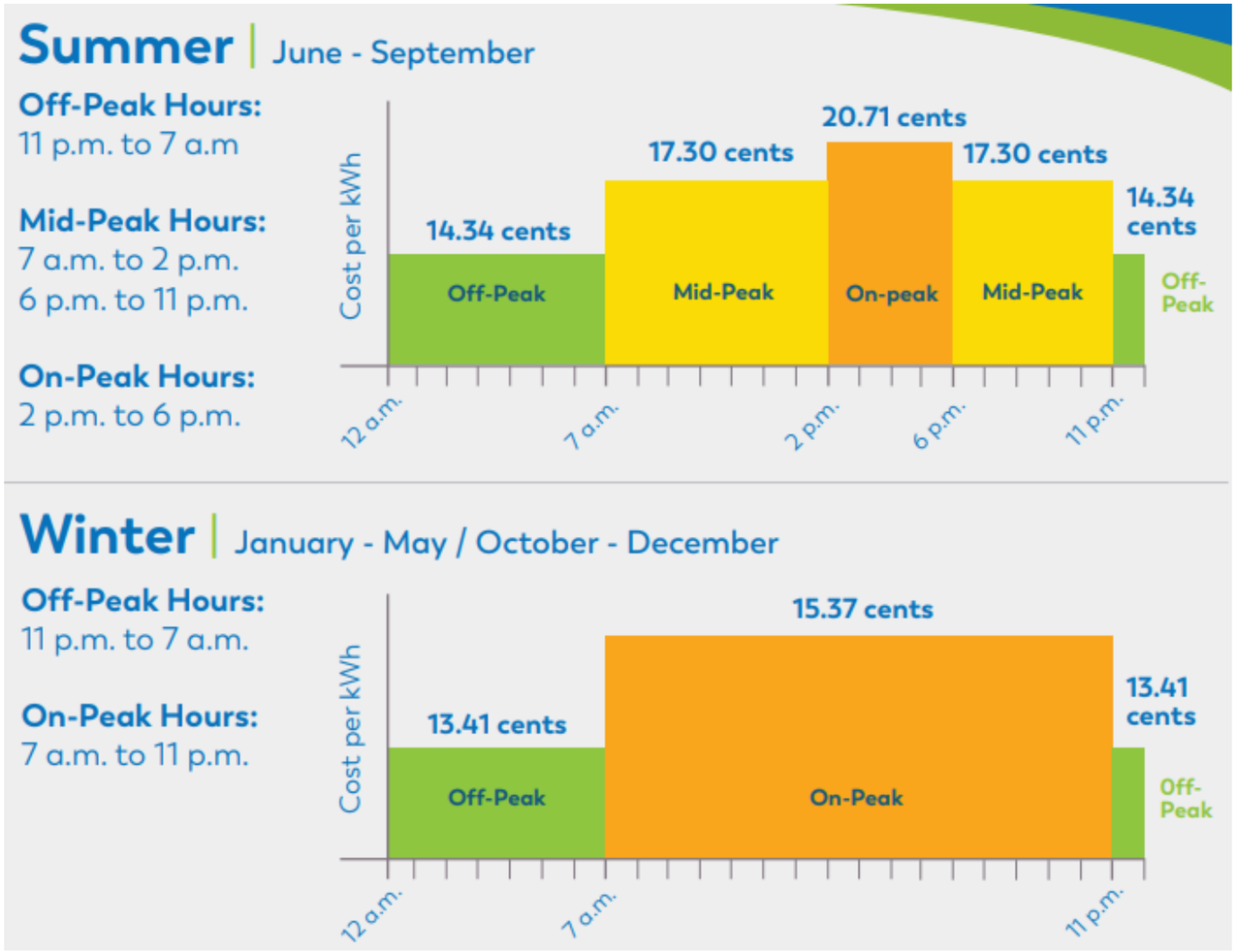


Source: NEMA Grid Reliability Study, 2025

Managed Charging

Case study: Consumers Energy PowerMIFleet

- Fleet TOU + incentives program
- Resulted in 85%+ off-peak charging 2022–23, ~91% off-peak charging 2024
- AMI-enabled monitoring allowed automated compliance
- Supporting 240 vehicles at 148 charging ports as of June 2025
- Initial $1.6M to support 12 fleets that serve an income-qualified communities, granted an additional $3M in 2025

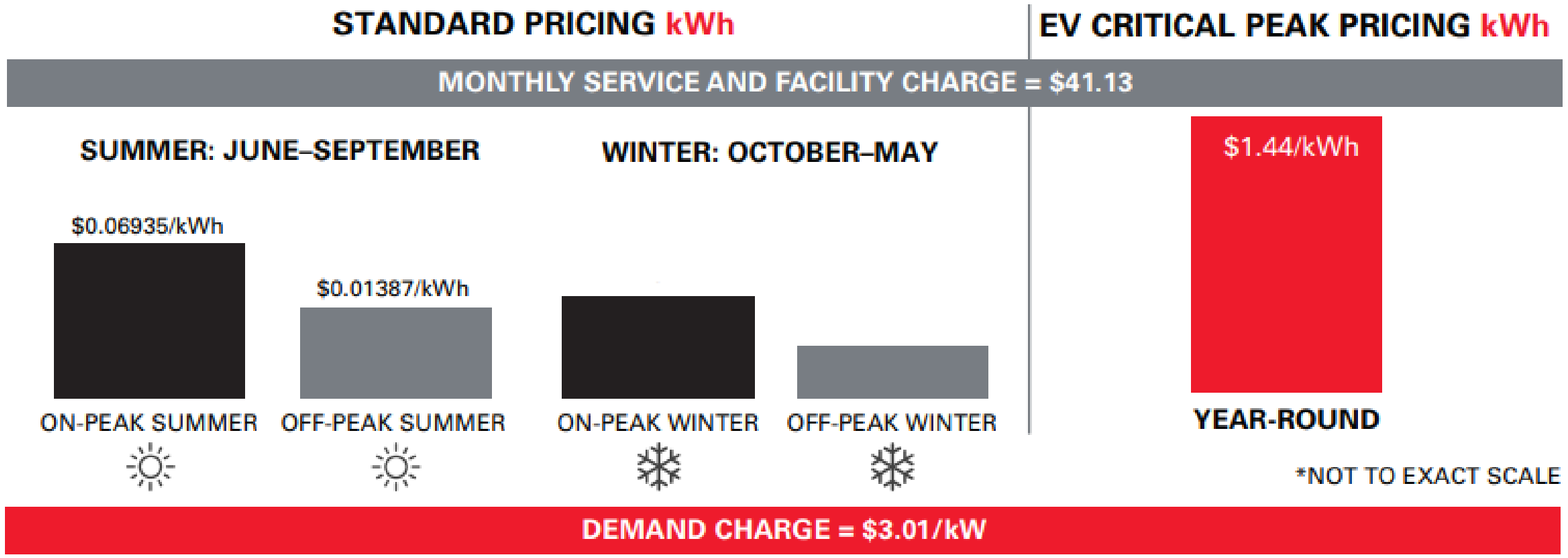


Source: Consumers Energy

Peak Load Shaving

Case study: Xcel Energy EV Critical Peak Pricing

- Fleet operations pay less for energy to charge EVs during off-peak hours
- Critical peak pricing events last four hours in duration and occur less than 15 times a year and no more than once per day
- Customers receive digital tools for near real-time energy monitoring at no additional cost, providing greater visibility and control over charging patterns.
- Customers are notified a day in advance

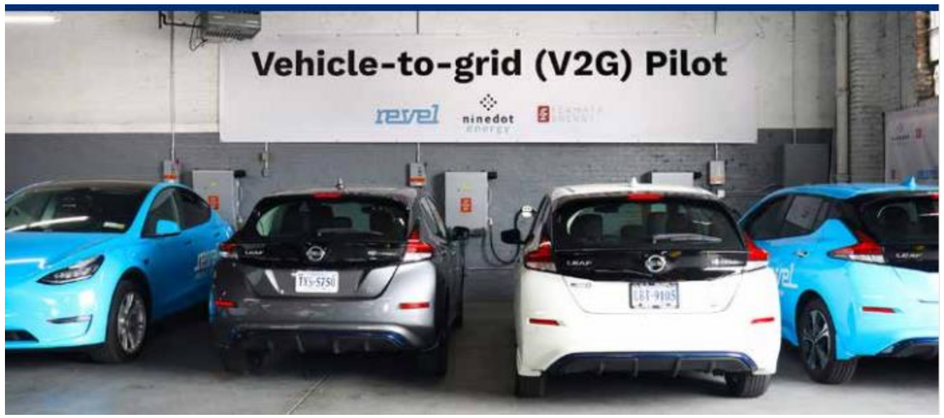


Source: Xcel Energy

Vehicle to Grid

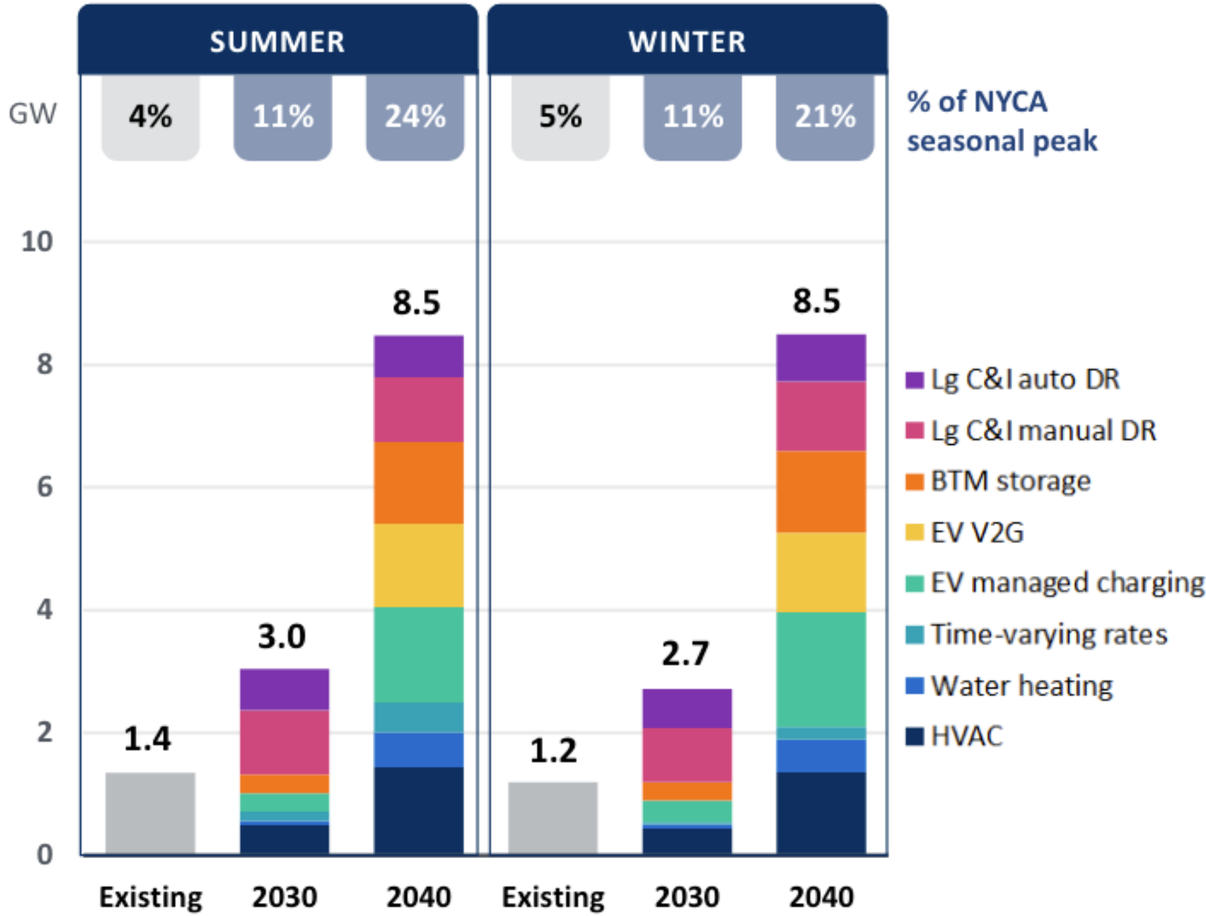
Case study: Revel V2G Pilot

- Revel wanted to understand potential revenue + interconnection process
- Used a variation of ConEd's stationary storage process for 3 vehicles
- ConEd's VDER tariff required participation every day for the summer, tough for rideshare vehicles
- Earned approximately $10,000 over a summer



Source: SEPA, Case Study: Revel Rideshare, 2023

Grid Flexibility Potential in New York (GW)



Source: The Brattle Group for NYSERDA and The New York Department of Public Service, 2025

Key Takeaways for Scaling Fleet Flexibility

Design simple, fleet-friendly TOU rates

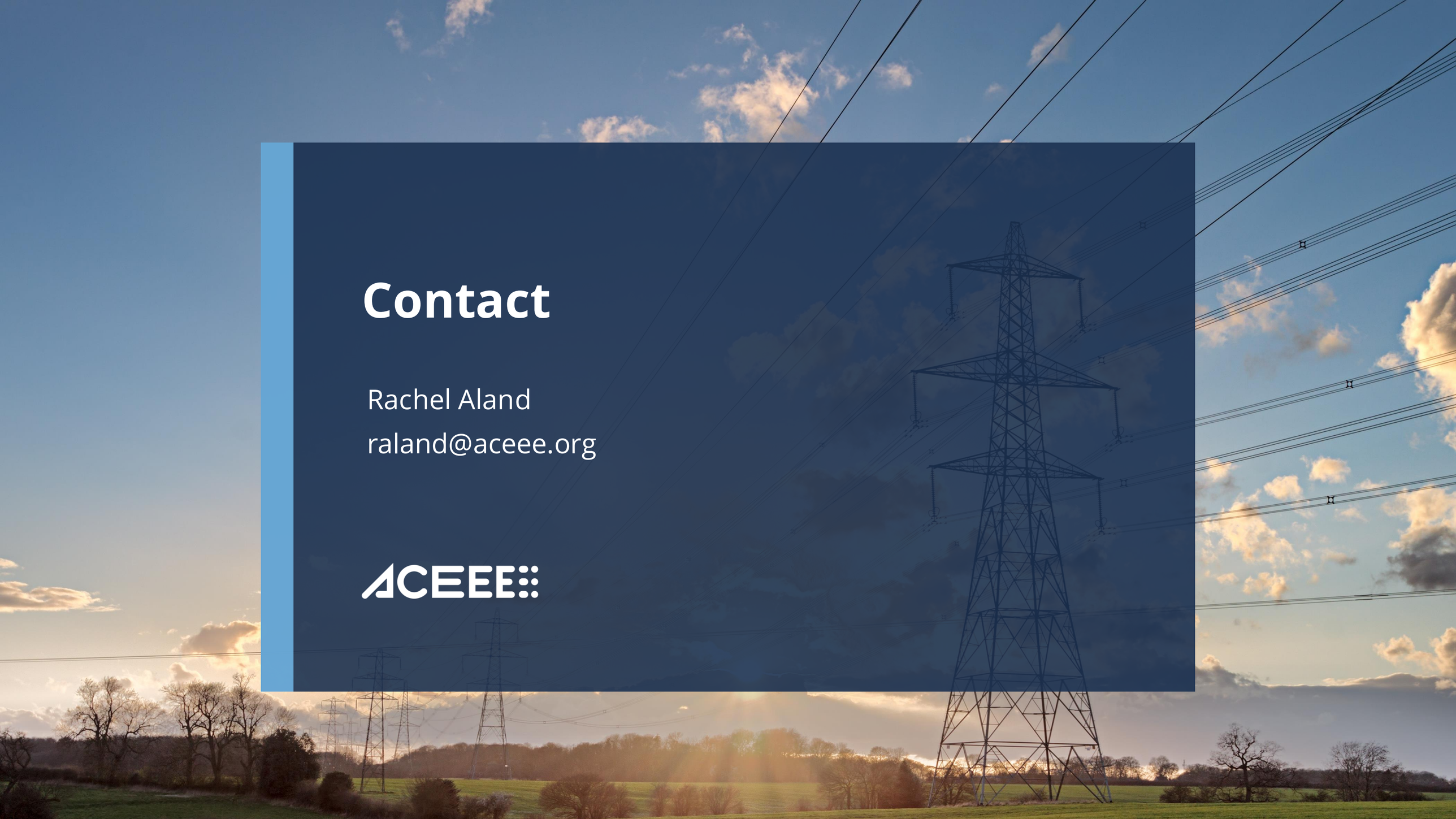
Pair managed charging with targeted incentives

Establish clear and streamlined V2G interconnection pathways

Move successful pilots quickly into permanent programs

Support proactive utility–fleet engagement and outreach

Embed managed charging and V2G into long-term planning



Contact

Rachel Aland
raland@aceee.org

Transportation Electrification Grid Readiness

Bryan Zulberti – Senior Interconnection Account Manager

DUKE ENERGY®

Transportation Electrification Grid Readiness (TEGR)

TRANSPORTATION ELECTRIFICATION GRID READINESS

TEGR is a mix of technical planning, project management, customer engagement, strategic coordination, interconnection, and policy alignment.

Bridging electrification goals and grid reliability, ensuring Duke can support the growing EV demand with the focus on innovation and affordability.

- Major C&I Customer support helping to provide guidance, incentives, and project coordination for charging infrastructure needs
- Electrification advisory services
- Work with Public Fast Charging providers
- Proactive customer outreach to understand EV demand and forecasted projects
  - Identify Fleet Load Clusters
  - File for T&D Pre-investment
- Engage with external parties on utility position and industry needs
- Assist with education and awareness of internal departments
- Program development to support fleet and public charging operators

Enterprise
Jay Oliver (Vice President)
Jason Haines (Manager)
Jinnah Bacchus (Sr. Engineer)

Sr. Interconnection Managers:

Carolinas
Tom DelViscio
Florida
Bryan Zulberti
Midwest
Claudio Troncoso

Strategic Innovation

TRANSPORTATION ELECTRIFICATION GRID READINESS

Duke Energy is driving EV innovation by partnering with industry leaders and customers to support load growth while keeping a focus on affordability.

- Interconnection Approaches
  - Proactive work with commercial customers electrifying fleets.
  - Identifying areas with capacity to meet customer need and avoid infrastructure costs.
  - Identify and learn customer manage charging programs.
- Manage Charging/Attractive Rates for EVs (Fluctuate by Jurisdiction)
  - TOU with Critical Peak Pricing.
  - TOU Demand.
  - Hourly Pricing.
- Additional Work
  - Microgrid-Powered Charging.
  - Vehicle-to-grid integration.
  - Software Optimization.

Enterprise
Jay Oliver (Vice President)
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Questions?

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Session 1: Flexibility from Commercial Fleets Q&A

Speakers:

Rachel Aland, Transportation Director, ACEEE

Bryan Zulberti, Regional Interconnection Account Manager, Duke Energy

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Facilitation Instructions

Question: What is one key action PUCs can take to enable flexibility from commercial fleets to support affordability?

Discussion Activity: 1 - 2 - 4

1. Each 1 person, write down one great idea for a PUC action.
2. Pair up with someone nearby (2 people). Share both ideas, then modify into a single stronger idea.
3. Each pair finds another pair (4 people). Share your two ideas and then modify into a single strongest idea.

At 3:10 pm: The group of 4 submits 1 idea through Slido to populate our ‘top 10’ list.

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Facilitation Question 1

What is one key action PUCs can take to enable flexibility from commercial fleets to support affordability?

Slido.com code: 2170574

Discussion 1

NARUC Winter Policy Summit
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Session 2: Flexibility from Residential Vehicles

Moderator:

Benjamin Baker, Senior Commission Advisor, Maryland PSC and Staff Lead, NARUC EV State Working Group

Speakers:

Emma Rodvien, Senior Manager, U.S. Regulatory Affairs and Market Development, Kraken

Rachael Nealer, Director, Atlas

KRAKEN

PART OF THE octopus energy GROUP

Managing EV load flexibility at Scale: Octopus Energy UK case study

February 8, 2026

Background

Octopus Energy UK

- UK’s largest retail electric supplier
- 7.5 million electric customers
- “Prosumer” rates & programs
  - Dynamic rates
  - V2G pricing
  - “Zero bills” homes
  - Managed EV charging

Kraken Technologies

- Enterprise software developer
- End-to-end solutions to manage the energy transition
- Global customer base
  - 70m customer accounts
  - 400,000 DERs under flexible management

Case Study:
OE UK “Intelligent Octopus Go” tariff

- First launched in 2022
- Problem statement = OE UK customer base has >750,000 EVs; how to control the cost-to-serve?
- How it works:

1. Customer enables OE control of EV and/or charger
2. Customer sets charging preferences (SoC, timing)
3. OE uniquely optimizes charging for prices and preferences
4. In return, customer offered a fixed whole-home rate → **7 p/kWh, or 9.52 ¢/kWh**

Case Study:
OE UK “Intelligent Octopus Go” tariff

How value is created:

- Currently-effective Ofgem price cap = **27.69 p/kWh (36 ¢/kWh)**
- ‘Intelligent Octopus Go’ fixed price is **>70% lower** than price cap
- Cost categories included in price cap:
  - 39% wholesale electricity costs → *Kraken optimizes for these*
  - 23% T&D network costs → *Kraken optimizes for these*
  - 16% retail supplier operating costs
  - 13% government policies/programs
  - 5% taxes

Source: Ofgem Energy Price Cap Explainer

How UK **time-varying network prices** enable flexible resources to deliver & realize value

Annex 1 - Schedule of Charges for use of the Distribution System by LV and HV Designated Properties

London Power Networks - Effective from 1 April 2023 - Final LV and HV charges

Time Bands for LV and HV Designated Properties

Time periods	Red Time Band	Amber Time Band	Green Time Band
Monday to Friday (Including Bank Holidays) All Year	11:00 - 14:00 16:00 - 19:00	07:00 - 11:00 14:00 - 16:00 19:00 - 23:00	00:00 - 07:00 23:00 - 24:00
Saturday and Sunday All Year			00:00 - 24:00
Notes	All the above times are in UK Clock time		

Time Bands for Unmetered Properties

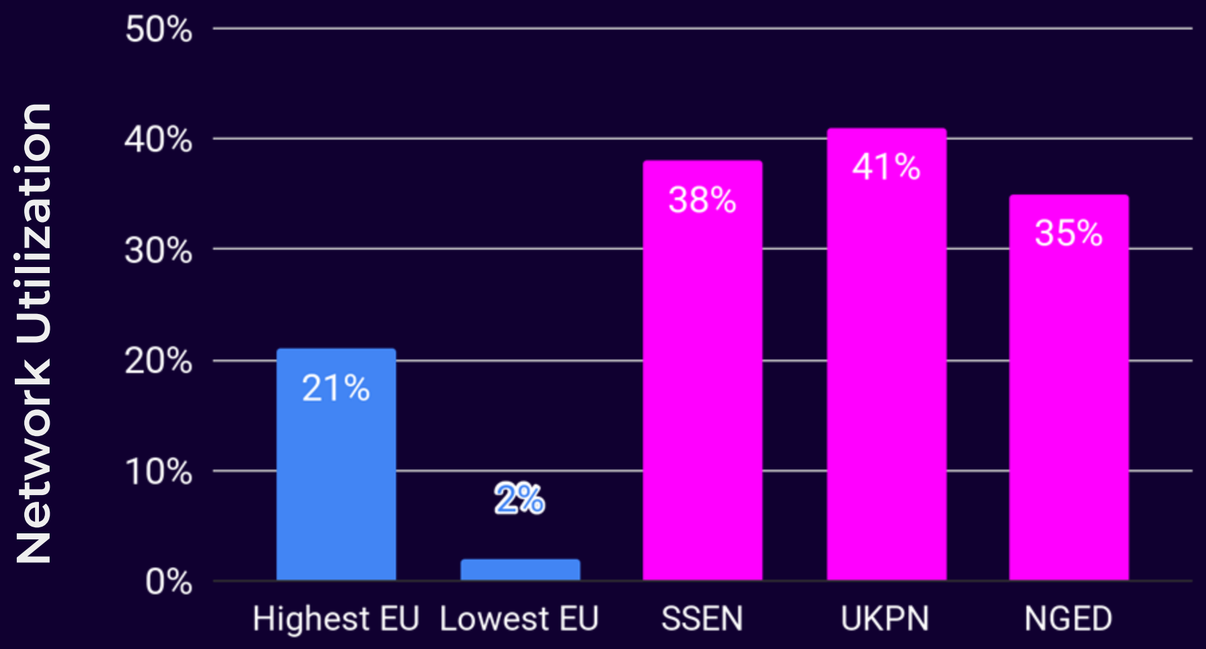
	Black Time Band	Yellow Time Band	Green Time Band
Monday to Friday (Including Bank Holidays) June to August Inclusive	11:00 - 14:00	07:00 - 11:00 14:00 - 23:00	00:00 - 07:00 23:00 - 24:00
Monday to Friday (Including Bank Holidays) November to February Inclusive	16:00 - 19:00	07:00 - 16:00 19:00 - 23:00	00:00 - 07:00 23:00 - 24:00
Monday to Friday (Including Bank Holidays) March, April, May and September, October		07:00 - 23:00	00:00 - 07:00 23:00 - 24:00
Saturday and Sunday All year			00:00 - 24:00
Notes	All the above times are in UK Clock time		

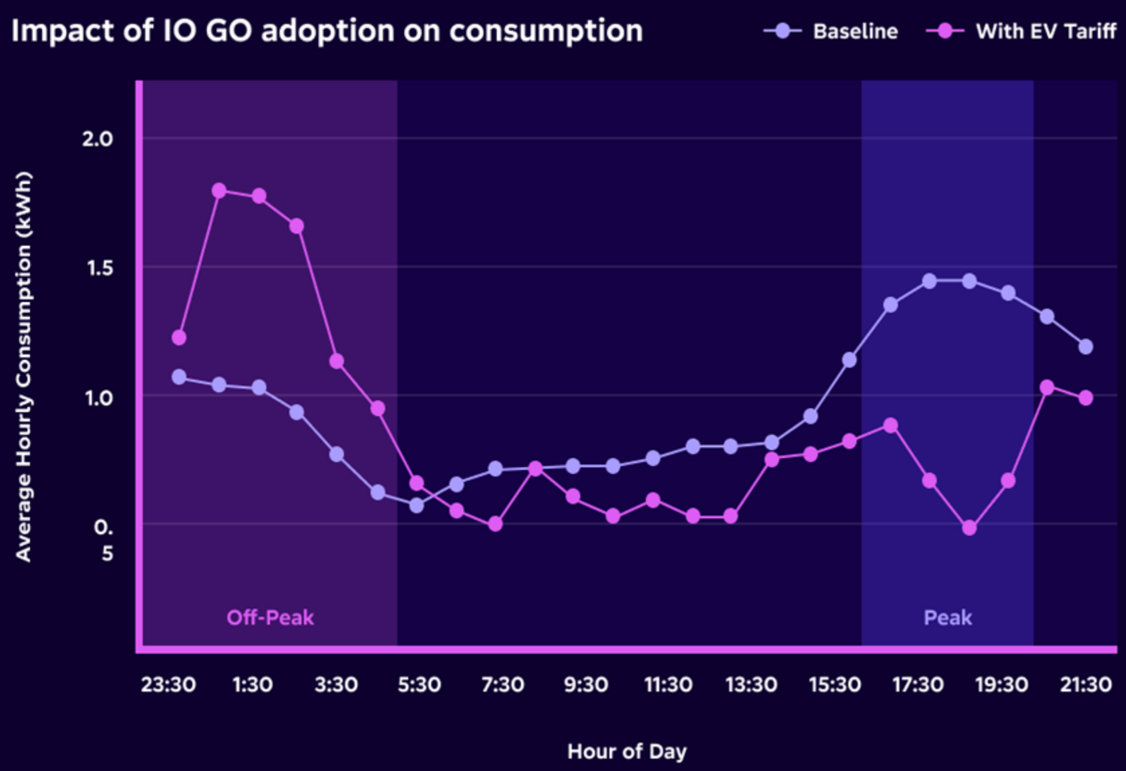
Tariff name	Open LLFCs	PCs	Red/black unit charge p/kWh	Amber/yellow unit charge p/kWh	Green unit charge p/kWh	Fixed charge p/MPAN/day	Capacity charge p/kVA/day	Exceeded capacity charge p/kVA/day	Reactive power charge p/kVArh	Closed LLFCs
Domestic Aggregated with Residual	1	0, 1, 2	9.557	0.988	0.000	2.59				902, 903, 906, 907, 910

- 6 Distribution Network Operators (DNOs)
- Red, amber, green pricing scheme → corresponds to on vs. off peak
- Peak prices are 10x higher than off-peak
- DNOs set their network prices annually

Case Study:
OE UK “Intelligent Octopus Go” tariff
Results

- 350,000+ participants (50% of eligible customers)
- 42% reduction in peak load





Lessons learned for PUCs

1. Scaling EV flexibility requires sophisticated **customer analytics capabilities**

Recommendation: Direct your utilities to report on current customer analytics capabilities (e.g. load profile analysis.); establish funding pathways for analytics improvements to support system efficiency and/or policy goals

1. Most cost-effective time to enroll is when **customers are new** → friction increases over lifecycle

Recommendation: require your utilities to proactively enroll new (eligible) customers in existing EV flexibility programs/offerings

1. Flexible EV loads can be managed for the benefit of the distribution network, not just the bulk system → but require **efficient economic signals** to do so

Recommendation: Direct your utility to study the feasibility of time-varying distribution rates

INTEGRATING ELECTRIC VEHICLES ON THE GRID: FLEXIBILITY FOR RESIDENTIAL VEHICLES

NARUC Winter Policy Summit

February 2026

Rachael Nealer, PhD

Atlas Public Policy

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THE OPPORTUNITY

EVs as Grid Assets

Electric vehicles serve as controllable loads and distributed storage, enhancing grid flexibility and stability.

Charging Strategies

Time-of-use pricing and behavioral incentives encourage charging during off-peak hours to reduce grid stress.

Demand Response and V2G

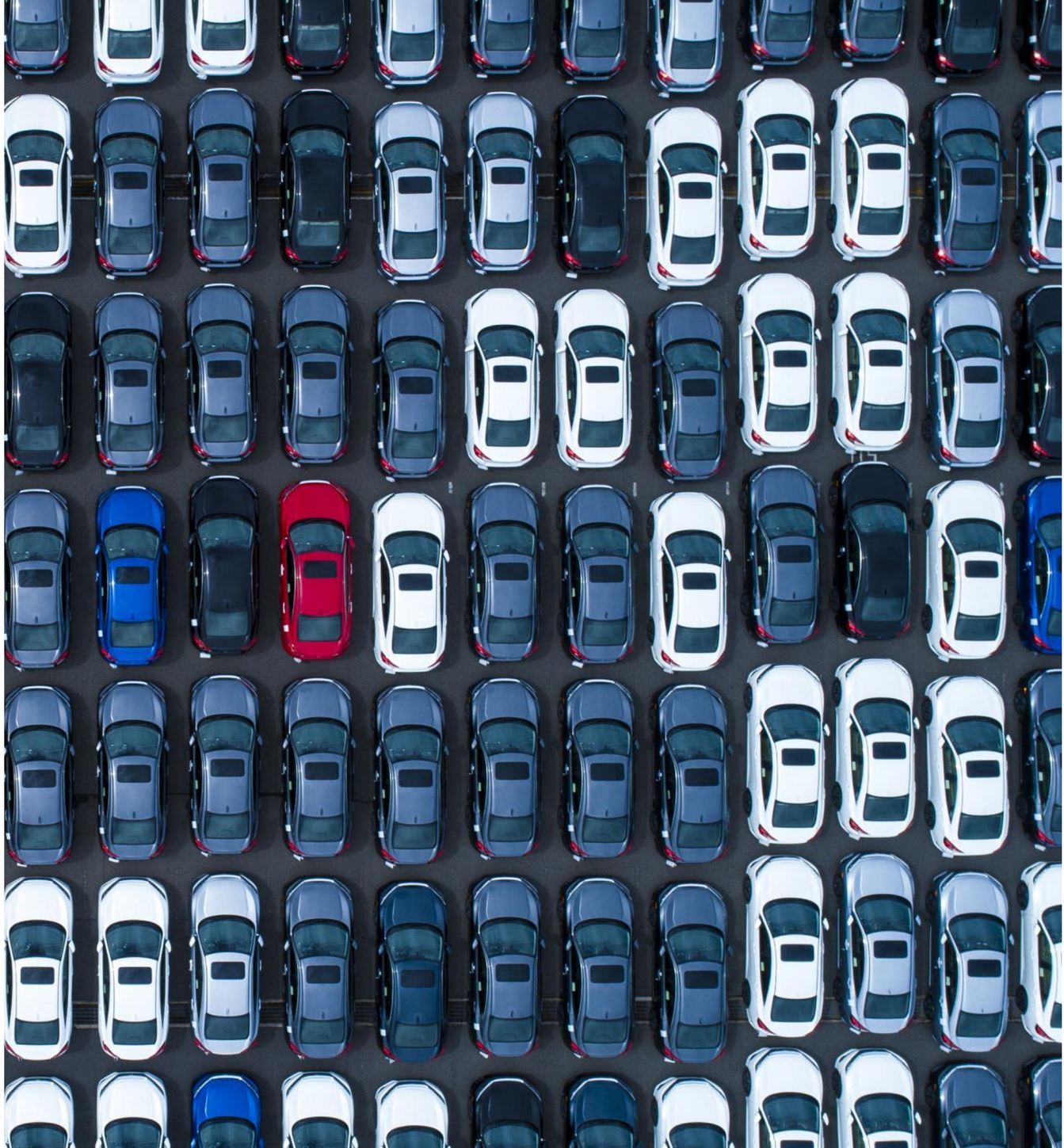
Demand response and vehicle-to-grid programs enable bidirectional energy flow and critical load management.

Benefits and Incentives

Potential to reduce infrastructure costs, optimize renewables, enhance reliability, and offer owner and grid savings.

Potential Downward Pressure on Rates

EV charging programs can generate more utility revenue than they cost, creating potential downward pressure on rates for all customers.



EXAMPLES OF EV INTEGRATION PROGRAMS

STATE	UTILITY	PROGRAM TYPE	KEY OUTCOME
Colorado	Xcel Energy	Dynamic Pricing	Aligned charging with renewable availability & response to grid demand
Maryland	BGE	Managed Charging	Evolved to virtual power plant optimization
North Carolina	Duke Energy	Managed Charging	Opt-in active managed charging with a flat monthly electricity fee
California	PG&E	V2G Pilots	Demonstrated bidirectional charging benefits
Massachusetts	National Grid	Off-Peak Rebates	Increased participation via app-based enrollment

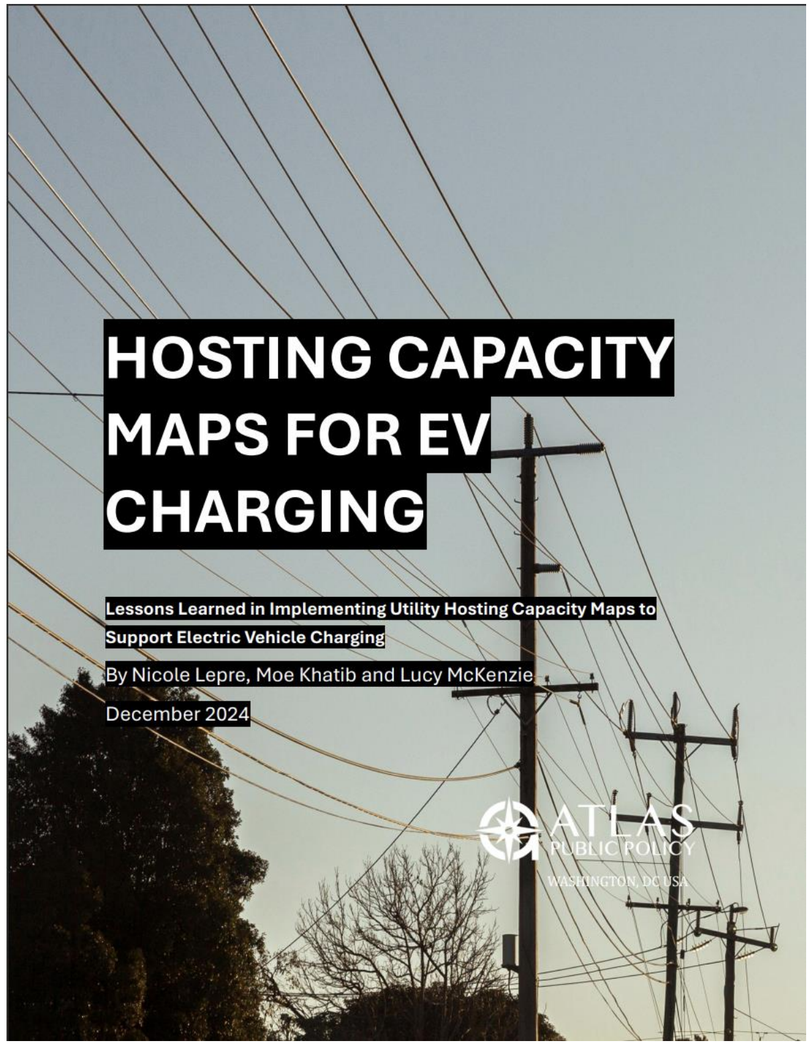
BARRIERS TO OVERCOME

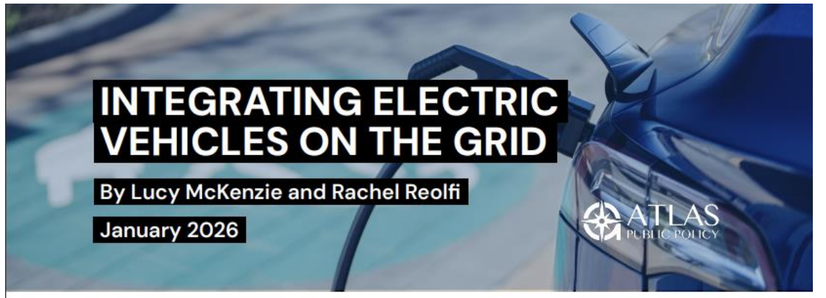
- Equipment and Communications Standardization and Costs
- Distribution and Interconnection Challenges
- Scaling Customer Participation
- Utility Planning Integration

PUC ACTIONS TO ENABLE EV INTEGRATION

STATE	PUC ACTION	IMPACT
California	DR Framework	Enables bidirectional capability and resource adequacy
Maryland	TOU Rates	Facilitates managed charging and V2G interconnection
Minnesota	Integrated Planning Mandate	Ensures EV flexibility in grid planning
New York	Expanded VDER Tariffs	Creates compensation for V2G projects
Nevada	PUCN approval of plans	Requires transportation electrification plans &EV rates and management programs
Illinois	ICC approval of plans	Requires utilities to file triennial demand response plans

MORE INFORMATION





Utilities and system operators can implement strategies that use EVs as grid assets to benefit grid operations, lower costs, and support the integration of renewable energy.

Electric vehicles (EVs) are essentially large batteries on wheels, and often sit idle for most of the day. That makes them potential grid assets that can, with the right strategies, help to lower costs for all consumers and improve renewable energy integration. Such strategies are designed to shift EV charging away from system peak hours or to enable vehicles to strategically discharge electricity to the grid. They include:

- **Electricity Pricing.** To motivate EV owners to avoid charging when the grid is most heavily loaded, many utilities offer electricity prices that are higher during peak demand hours and lower during off-peak hours (known as "time-of-use" pricing). In areas where renewables are a large share of the energy mix, utilities may also offer lower prices during hours of abundant renewable generation.
- **Other Behavioral Incentives.** Some utilities partner with charging app providers or use telematics data to encourage EV owners to charge during off-peak or high-renewables hours. These programs rely on information and light nudges via app or email to push drivers to shift their charging in a consistent way.
- **Demand Response (DR) Programs.** Some utilities and system operators run opt-in programs that incentivize EV owners to temporarily curtail charging in real time when the grid is capacity constrained or costs are particularly high. In some programs, the utility sends a signal to participating drivers during a grid event and asks them to curtail; in others, the utility can directly modulate charging through a connected charger or vehicle telematics. Utilities or system operators may also contract with EV load aggregators, which pool many participants and deliver a single, reliable demand response resource to the grid.
- **Vehicle-to-Grid (V2G) Programs.** V2G programs allow EVs to become bidirectional grid resources. Similar to DR programs, EVs can adjust when they charge in response to grid needs, but they can also go a step further by discharging stored energy back to the grid during

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Session 2: Flexibility from Residential Vehicles Q&A

Speakers:

Emma Rodvien, Senior Manager, Kraken

Rachael Nealer, Director, Atlas

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Facilitation Question 2

What is one key action PUCs can take to enable flexibility from residential fleets to support affordability?

Slido.com code: 2170574

Discussion 2

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Session 3: Including All Customers

Moderator:

Steve Olea, Special Advisor to the Commission, Arizona Corporate Commission and Staff Lead, NARUC EV State Working Group

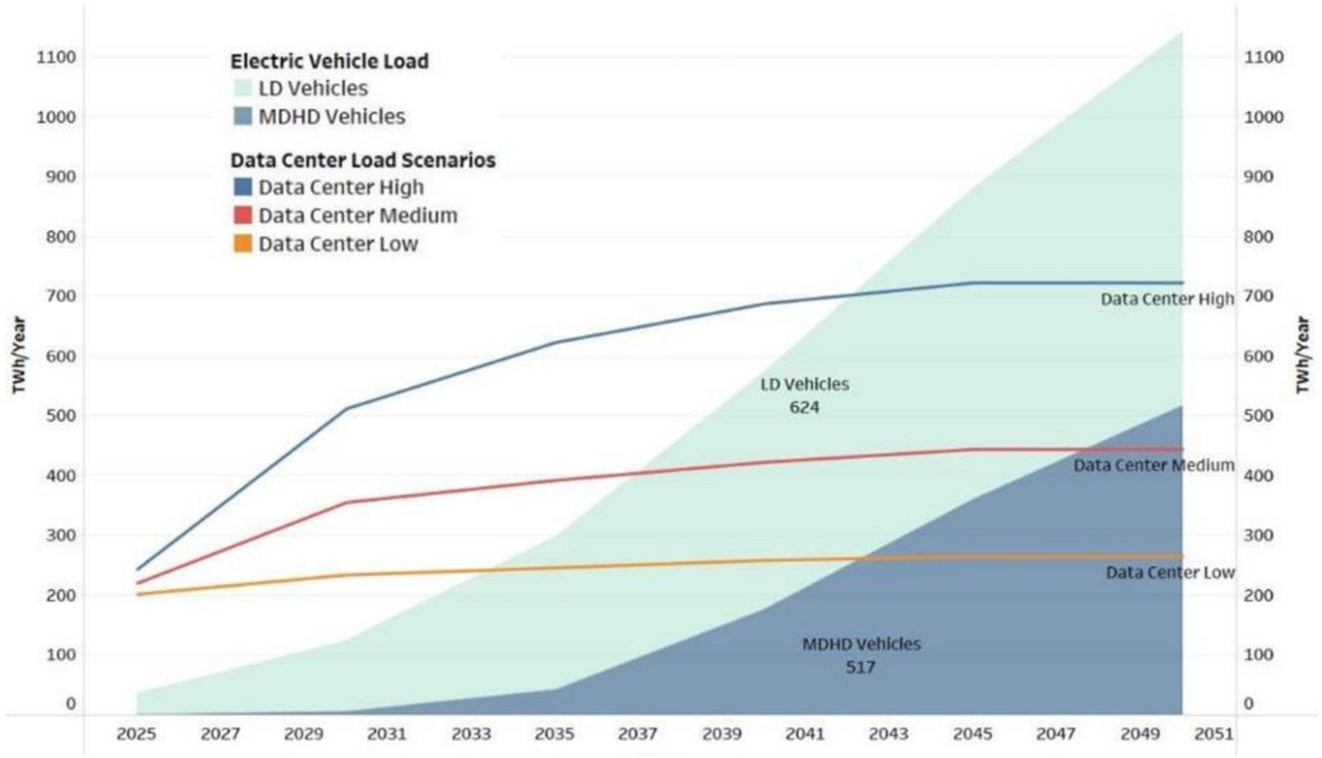
Speakers:

Jeff Allen, Executive Director, Forth

Danielle Kievit, Senior Clean Energy Product Manager, Puget Sound Energy

FORTH

Nationwide eRoadMAP Load Growth together with Data Center Load Scenarios

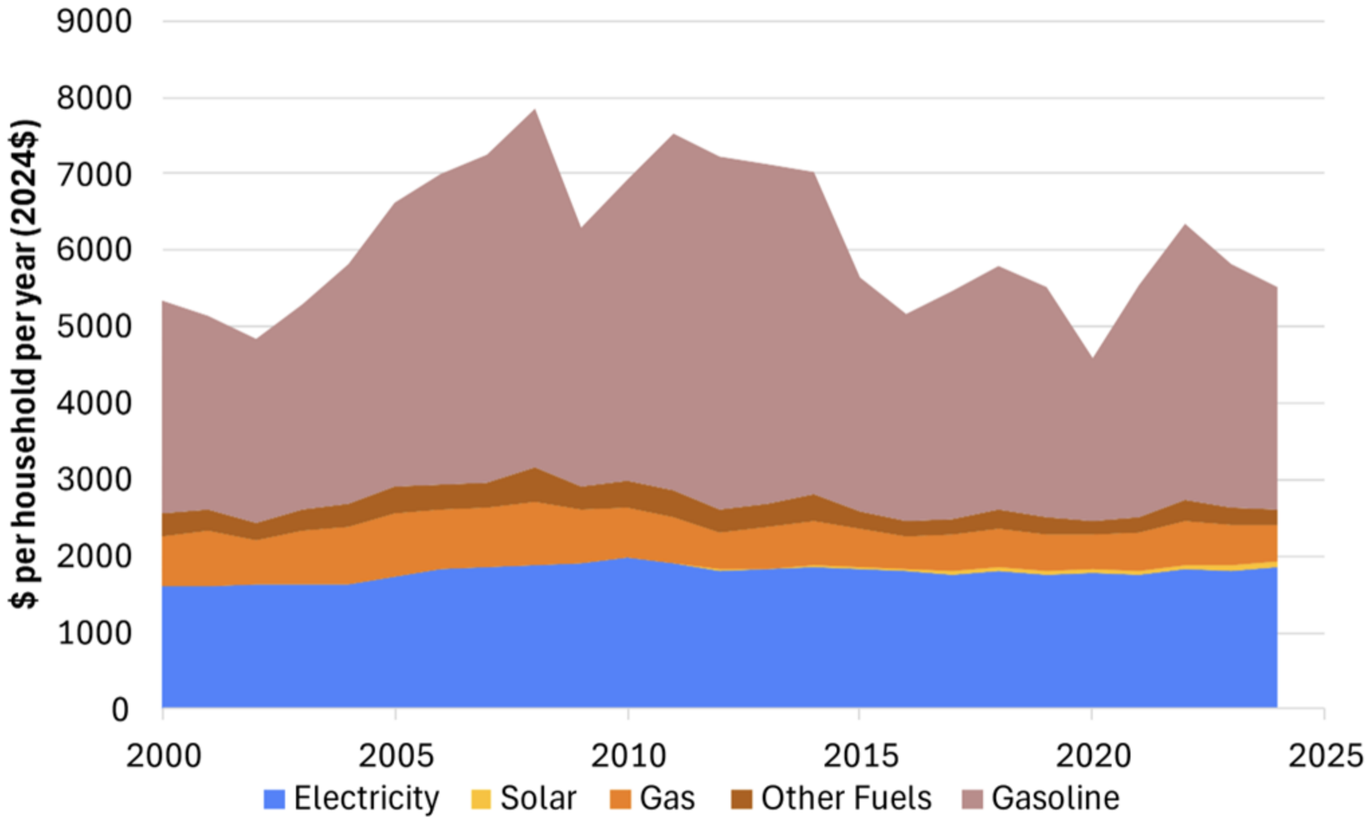


Source: EPRI. Electric Vehicle Load: eRoadMAP; Data Center Load: Powering Data Centers 2024

Electric Transportation Benefits Utilities

- Largest load growth is also most flexible
- Naturally trends off peak
- Downward pressure on rates

- With or without managed charging!



Electric Transportation Benefits LMI Customers

- Lower utility bills
- Lower energy costs
- Lower air pollution
- Greater resilience

- With or without managed charging!

Inclusive Design

- “Curb cut theory”
- Nothing about us without us
- Engagement requires information
- Center people and their needs, not technology

- Keep it simple

Thoughts for Regulators

- Encourage robust programs
- Support portfolio approach
- Consider all customer benefits
- Encourage experiments and learning
- Require informed community engagement
- Build in outreach and technical assistance

- Keep it simple!

FORTH ROADMAP CONFERENCE

September 13-15, 2026 | roadmapforth.org | Seattle Convention Center

1

The nation's **leading** electric transportation **conference**

1,000

Over **1,000 attendees** from **10 countries** and **40+ U.S. states**

In **Seattle**, a **hub** for clean energy innovation and sustainable mobility

Unmatched opportunities for **networking, collaboration,** and **sponsorship**

In a time of **rapid policy shifts** and evolving transportation priorities, staying connected has **never been more essential.**

Discussion

Jeff Allen, Executive Director, Forth
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Managed Charging

Demonstrations and Plans

February 8, 2026

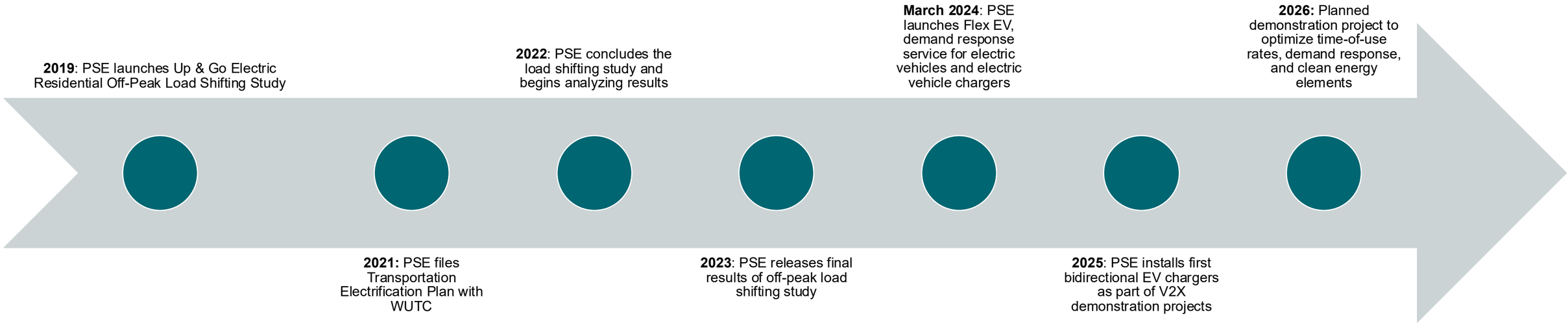
PUGET SOUND ENERGY

Who is Puget Sound Energy?

- Washington's largest and oldest utility, **serving 1.5 million customers** in 10 counties.
- Our service area spans **6,000 square miles**
- We share our customers' **concern for the environment**, balanced with their expectations for uncompromised **reliability, affordability and safety**.

PUGET SOUND ENERGY

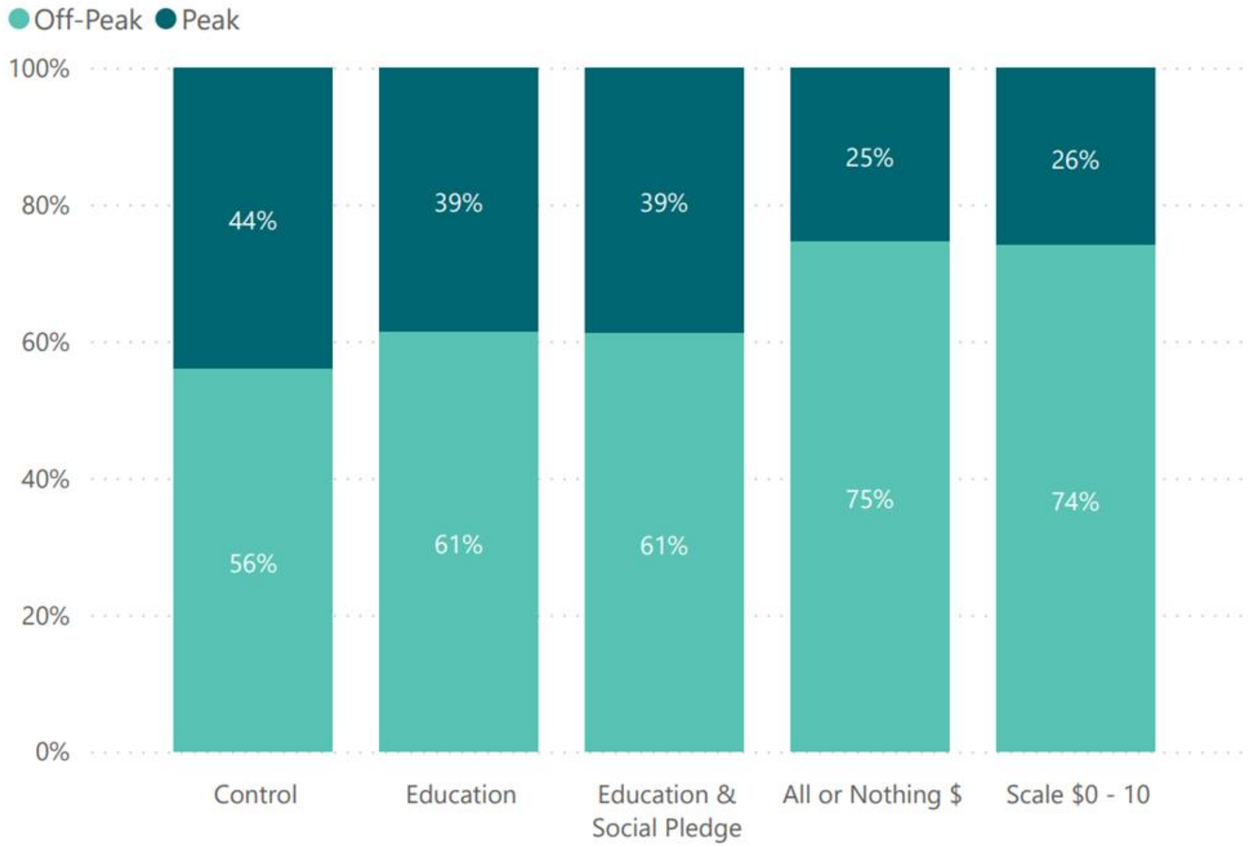
PSE's Managed Charging Timeline



PSE Up & Go Electric: Off-Peak Load Shifting Study

Between 2019 and 2020, PSE installed Level 2 EV chargers in 500 residential electric customer homes

- **Each enrolled participant was sorted into 1 of 5 reinforcement groups**
- **Analyzed how customers responded to shifting load based on the reinforcement group**
- **The study concluded at the end of 2022 and results were published in a biannual report**
  - **Financial incentives yielded the best results**
  - **Education also resulted in a higher propensity to charge off peak**



Flex EV and PSE's Home Charging Rebate

PSE simultaneously launched Flex EV and the Home Charging Rebate in 2024.

- **Customers can participate in Flex EV via vehicle telematics or their EV charger**
- **Home Charging Rebate provides an affordable way for customers to participate if telematics are not an option**
  - **Enhanced rebates are available for income eligible customers making 80% AMI or 200% FPL**
  - **Customers can be automatically pre-enrolled into Flex EV and receive communication about completing their enrollment**

Opportunities and Challenges

Utilities can't implement these programs on their own – we need support from OEMs, regulatory agencies, and our customers.

- **Comprehensive community engagement helps inform what barriers to participation exist and how utilities can mitigate**
- **Demonstration projects help to test the technology before launching at scale**
- **The market is nascent – there is constant changes to available technology which may also be new to implementation partners**
- **Flexibility is critical – one size does not fit all**

Questions

PSE PUGET SOUND ENERGY

NARUC Winter Policy Summit
February 8–11, 2026
Washington, D.C.

Session 3: Including All Customers Q&A

Speakers:

Jeff Allen, Executive Director, Forth

Danielle Kievit, Senior Clean Energy Product Manager, Puget Sound Energy

NARUC Winter Policy Summit
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Facilitation Question 3

What should we add towards building our Top 10 Actions PUCs can take to enable flexibility to support affordability?

Slido.com code: 2170574

Discussion 3

NARUC Winter Policy Summit
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Closing

Next Steps:

- NARUC will share PPTs from today
- SEPA will summarize the discussion
- Join us for future learning opportunities

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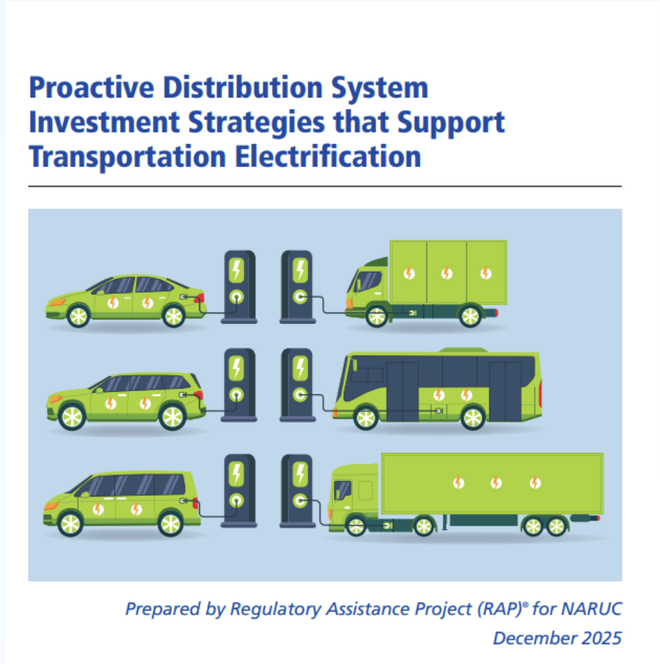
NARUC Resources

New: Proactive Distribution System Investment Strategies that Support Transportation Electrification



NARUC EV State Working Group

- Members-only monthly webinars + peer sharing discussions
- Wide range of topics, prioritized by members
- Email Margerie at msnider@naruc.org for more info / to join
- Recordings and past presentations: