Contents

	THE OPEN CETION	0
1	INTRODUCTION	.8
	Historical and Policy Context, 8 The Plug-in Electric Vehicle and Current Sales, 9	
	Plug-in Electric Vehicles: Benefits and Trade-offs, 12	
	The Committee and Its Task, 13	
	The Committee's Approach to Its Task, 16	
	Organization of This Report, 16	
	References, 17	
2	PLUG-IN ELECTRIC VEHICLES AND CHARGING TECHNOLOGIES	19
	Types of Plug-in Electric Vehicles, 19	
	High-Energy Batteries, 22	
	Relative Costs of Plug-in Electric and ICE Vehicles, 25	
	Vehicle Charging and Charging Options, 29	
	References, 34	
3	UNDERSTANDING THE CUSTOMER PURCHASE AND MARKET DEVELOPMENT	
	PROCESS FOR PLUG-IN ELECTRIC VEHICLES.	.37
	Understanding and Predicting the Adoption of New Technologies, 37	
	Demographics and Implications for Adoption and Diffusion of Vehicles, 39	
	The Mainstream Consumer and Possible Barriers to Their Adoption of Plug-in Electric Vehicles, 46	
	Vehicle Dealerships: A Potential Source of Information? 51	
	Strategies to Overcome Barriers to Deployment of Plug-in Electric Vehicles, 53	
	Federal Government Efforts to Familiarize Consumers with Plug-in Electric Vehicles: Clean Cities Coalition, 57	
	Fleet Purchases, 58	
	References, 60	
4	GOVERNMENT SUPPORT FOR DEPLOYMENT OF PLUG-IN ELECTRIC VEHICLES	65
•	Federal Government Research Funding to Support Deployment of Plug-in Electric Vehicles, 65	.00
	Institutional Support for Promoting Plug-in Electric Vehicle Readiness, 66	
	Transportation Taxation and Financing Issues Related to Plug-in Electric Vehicles, 67	
	Streamlining Codes, Permits, and Regulations, 74	
	Ancillary Institutional Issues Related to Support for Plug-in Electric Vehicles, 75	
	References, 78	
5	CHARGING INFRASTRUCTURE FOR PLUG-IN ELECTRIC VEHICLES	.82
	Charging Infrastructure and Effects on Deployment of Plug-in Electric Vehicles and on	
	Electric Vehicle Miles Traveled, 82	
	Models for Infrastructure Deployment, 90	
	References, 95	

A11	
6	IMPLICATIONS OF PLUG-IN ELECTRIC VEHICLES FOR THE ELECTRICITY SECTOR
7	INCENTIVES FOR THE DEPLOYMENT OF PLUG-IN ELECTRIC VEHICLES
	APPENDIXES
A	BIOGRAPHICAL INFORMATION ON THE COMMITTEE ON OVERCOMING BARRIERS TO ELECTRIC-VEHICLE DEPLOYMENT
B C	MEETINGS AND PRESENTATIONS
C	
	BOXES, FIGURES, AND TABLES
BOXE	cs ·
1-1	Statement of Task, 14
3-1	Calculating Electricity or Fuel Costs for Plug-in Electric and Other Vehicles, 49
5-1	Some Hypothetical Economics for Providers of Public Charging, 95
7-1	Derivation of Petroleum Equivalent for a Battery Electric Vehicle, 115
7-2	Financial Incentives, 117
FIGU	RES
1-1	U.S. BEV monthly sales data from 2010 to 2014, 10
1-2	U.S. PHEV monthly sales data from 2010 to 2014, 11
1-3	World PEV sales in 2012, 2013, and 2014, 11
1-4	The rate of PEV market growth in its first 34 months superimposed on the rate of HEV market growth
1-5	during its first 34 months, 12 Projected annual light-duty PEV sales as a percentage of total light-duty vehicle sales, 13
2-1	The volume energy density and the mass energy density for various battery types, 23
2-2	Representation of a lithium-ion battery that shows lithium ions traveling between the anode and the cathode
	and electrons traveling through the external circuit to produce an electric current, 24
2-3	Effect of ambient temperature on battery capacity on a 20 kWh battery in a PHEV, 26
2-4	Change in the sales price of NiMH, Li-ion, and NiCd battery cells from 1999 to 2012, 28
2-5	For AC level 1, a vehicle is plugged into a single-phase 120 V electric socket through a portable safety device called an electric vehicle supply equipment (EVSE), 30
2-6	The SAE J1772 plug that connects all PEVs to AC level 1 and level 2 is an agreed-on universal standard for
2-7	120 V and 240 V ac charging, 30 For AC level 2 charging, a vehicle is plugged into a split-phase 240 V electric circuit like those used by electric
2-1	dryers, stoves, and large air conditioners through a wall- or post-mounted safety device called an electric vehicle supply equipment (EVSE), 31

Contents xiii

- 2-8 Four plugs and control protocols are now being used for DC fast charging, 32
- 2-9 DC fast charging a Nissan Leaf, 32
- 2-10 As of February 2015, Tesla had installed 190 units in the United States, 33
- 3-1 Years needed for fastest growing consumer technologies to achieve penetration (0-50 percent or 51-80 percent), 38
- 3-2 Distribution of adopter categories, 40
- 3-3 Women's rate of participation in the markets for all vehicles and for PEVs, 42
- 3-4 Projected 2014 light-duty PEV volume in the 100 largest MSAs, 43
- 3-5 Worldwide growth of car sharing in terms of vehicles and members, 45
- 3-6 Clean Cities coalitions funded for community-readiness and planning for PEVs and PEV charging infrastructure, 58
- 3-7 Fleet sales for passenger vehicles for 2012 by fleet purchase agency, 59
- 4-1 Corporate Average Fuel Economy requirements by year, 68
- 4-2 Sources of revenue for the federal Highway Trust Fund, FY 2010, 69
- 4-3 U.S. annual light-duty fuel consumption and VMT, 70
- 4-4 Annual transportation-related taxes paid by Washington state drivers, 71
- 4-5 Historic and forecast gasoline-tax revenue for Washington state, FY 1990 to FY 2040, 73
- 4-6 PEV-specific measures for transportation funding, 74
- 5-1 PEV charging infrastructure categories, ranked by their likely importance to PEV deployment, with the most important, home charging, on the bottom, and the least important, interstate DC fast charging, at the top, 83
- 5-2 Vehicle locations throughout the week on the basis of data from the 2001 National Household Travel Survey, 84
- 6-1 U.S. electricity demand growth, 1950-2040, 99
- 6-2 Schematic of U.S. electric power delivery system, 99
- 6-3 Hourly demand for electricity at a substation in a residential distribution system, 101
- 6-4 Residential charging behavior in NES and PG&E service territories, as measured in the EV Project, 104
- 6-5 States that have regulations regarding who can own or operate a PEV charging station, 106
- 7-1 Japan's clean energy vehicles promotion program, 119
- 7-2 U.S. HEV and PEV sales overlaid with U.S. gasoline prices, 120

TABLES

- S-1 Four Classes of Plug-in Electric Vehicles, 2
- S-2 Effects of Charging Infrastructure by PEV Class and Entities Motivated to Install Infrastructure Categories, 5
- 2-1 Definitions and Examples of the Four Types of Plug-in Electric Vehicles, 20
- 2-2 Properties of Lithium-Ion Batteries in Four Plug-in Electric Vehicles on the U.S. Market, 24
- 2-3 Estimates of Dollars per Kilowatt-hour for a 25 kWh Battery, 27
- 2-4 Summary of Estimated Costs of Total Energy from Various Sources (2013 U.S. \$/kWh), 28
- 3-1 Categories and Descriptions of Adopters, 40
- 3-2 Comparison of New BEV Buyers, PHEV Buyers, and ICE-Vehicle Buyers, 41
- 3-3 Comparison of All New-Vehicle Buyers to Buyers of Specific Plug-in Electric Vehicles, 41
- 3-4 Factors That Affect Adoption and Diffusion of Innovation, 46
- 3-5 Consumer Questions Related to Plug-in Electric Vehicle (PEV) Ownership, 51
- 3-6 Ratings of Dealer Knowledge about Various Topics, 53
- 3-7 Websites with Information on Plug-in Electric Vehicles, 55
- 3-8 Information Resources for Fleet Managers, 59
- 4-1 Factors Determining PEV Readiness and Organizations Involved, 67
- 4-2 Comparison of Unrealized Revenue from Battery Electric Vehicles and Plug-in Hybrid Electric Vehicles, 72
- 4-3 Types of Equity and Examples in the Transportation Tax System, 72
- 4-4 Variation in Residential Electric Permit Fees by City or State, 75
- 5-1 Effect of Charging-Infrastructure Categories on Mainstream PEV Owners by PEV Class, 85
- 5-2 Charging Patterns for Nissan Leafs and Chevrolet Volts, 87
- 5-3 Entities That Might Have an Incentive to Install Each Charging Infrastructure Category, 91
- 5-4 Costs of Installing Public DC Fast-Charging Stations for the West Coast Electric Highway Project, 93
- 6-1 Definitions, Advantages, and Disadvantages of Various Types of Electric Rates, 103
- 7-1 MSRPs and 5-year Cumulative Cost of Ownership for Selected Plug-in Electric Vehicles and Comparative Vehicles (dollars), 111
- 7-2 Incentives for Plug-in Electric Vehicles (PEVs) by Country and State, 118