

# Ohm Analytics: Solutions Overview

Market Intelligence for the Distributed Energy Transition

**CONTACT:**

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Offices: San Diego & Boston

# About Ohm Analytics

Ohm  Analytics

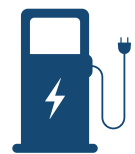
Research and analytics firm founded in 2018  
covering the distributed energy transition



Solar



Storage



EV Charging



Built Environment



VPP DER-to-Grid Insights

Used by 700+ companies across OEMs, distributors,  
software, installers, developers, and service providers  
to stay ahead of market trends, find opportunities  
and connect within the industry

## Select Clients



# Ohm Overview & Offering



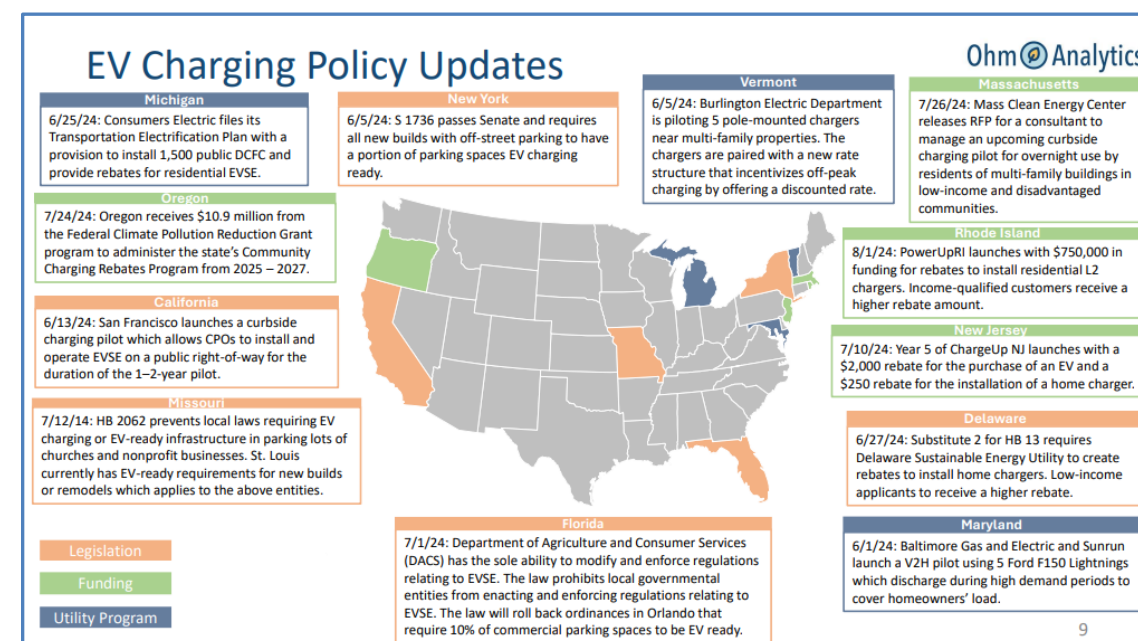
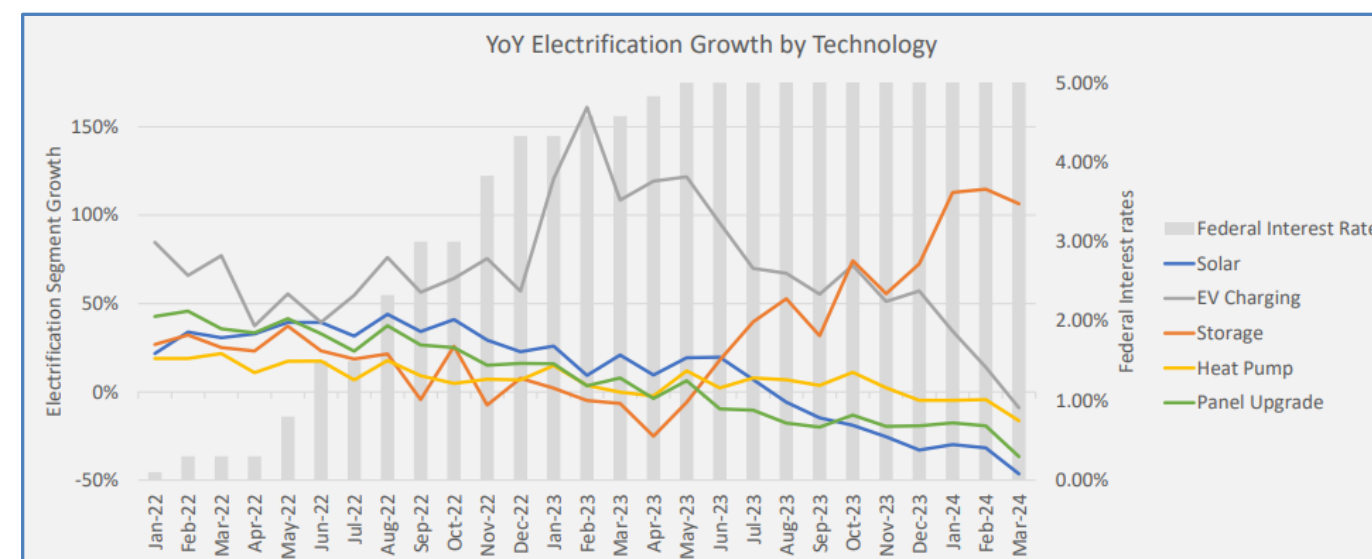
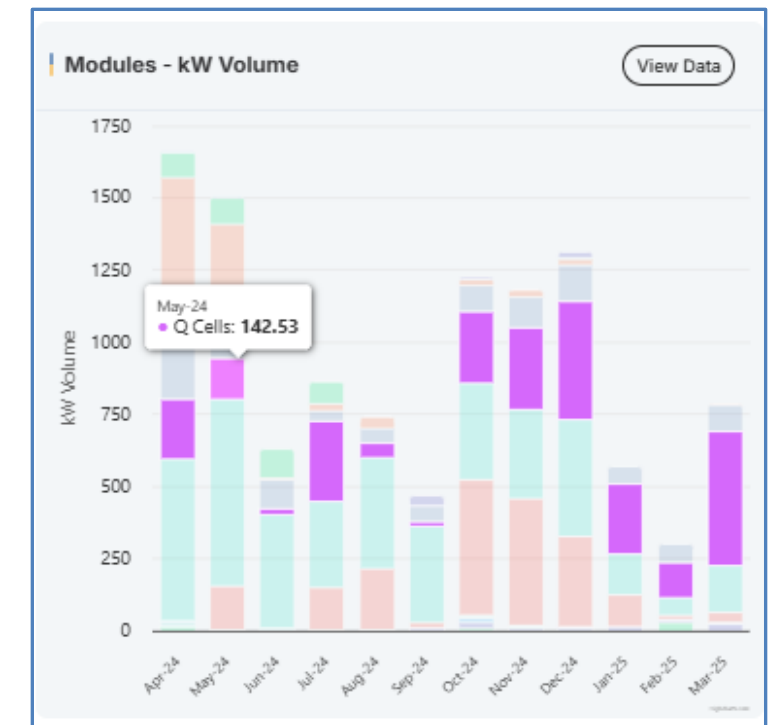
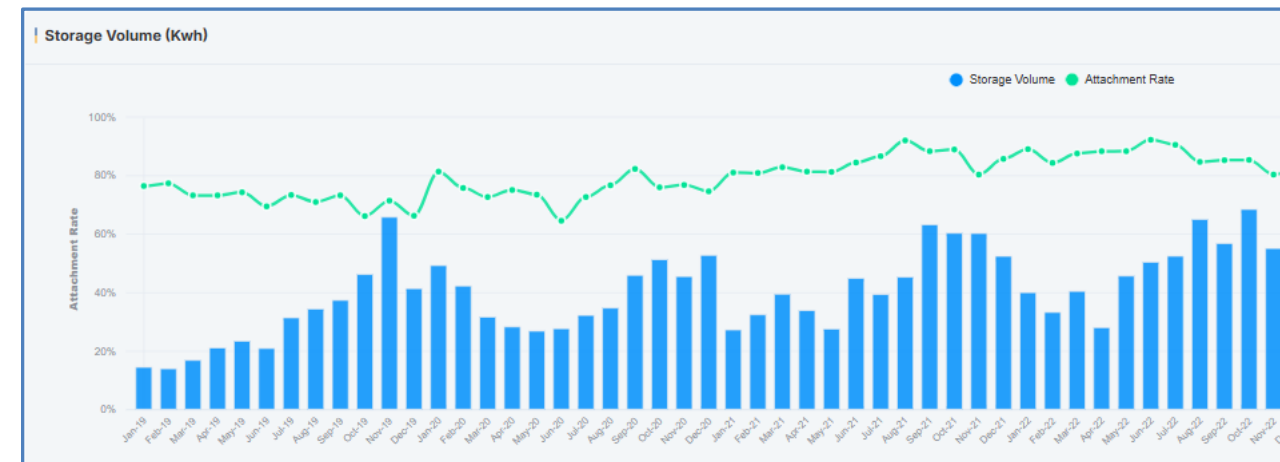
**Web Platform:** Location-level data on solar, storage, EV charging, heat pumps, market share by manufacturer, top installers by state



**Reporting:** Quarterly and monthly reports on market trends and outlook on market evolution and pace of adoption (VPPs, Solar + Storage, EVs, Heat Pumps); reports by state, metro area, and nationally



**Policy and Program Research:** Weekly tracking of policy, regulatory, and program developments impacting DERs and VPPs, cross-referenced with our project database to see the effects of policy/programs on the market

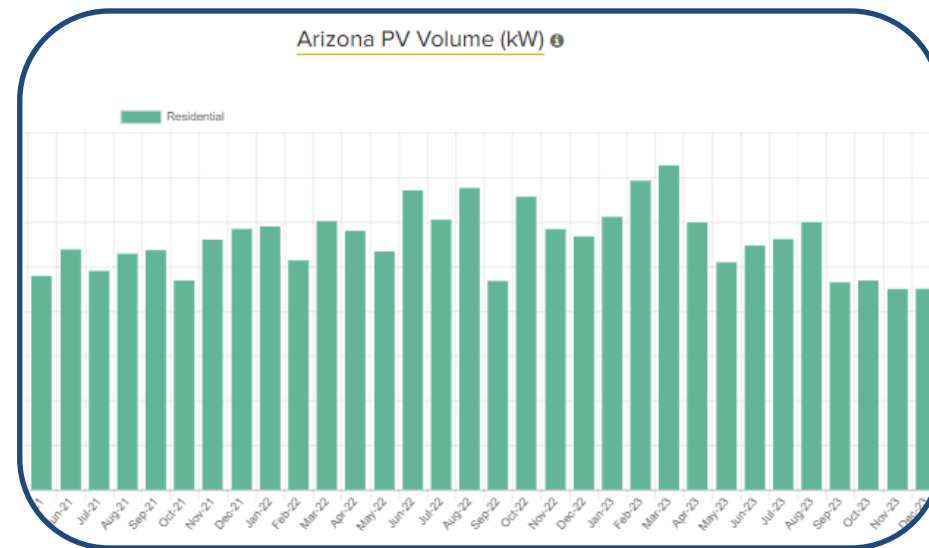


Ohm Analytics



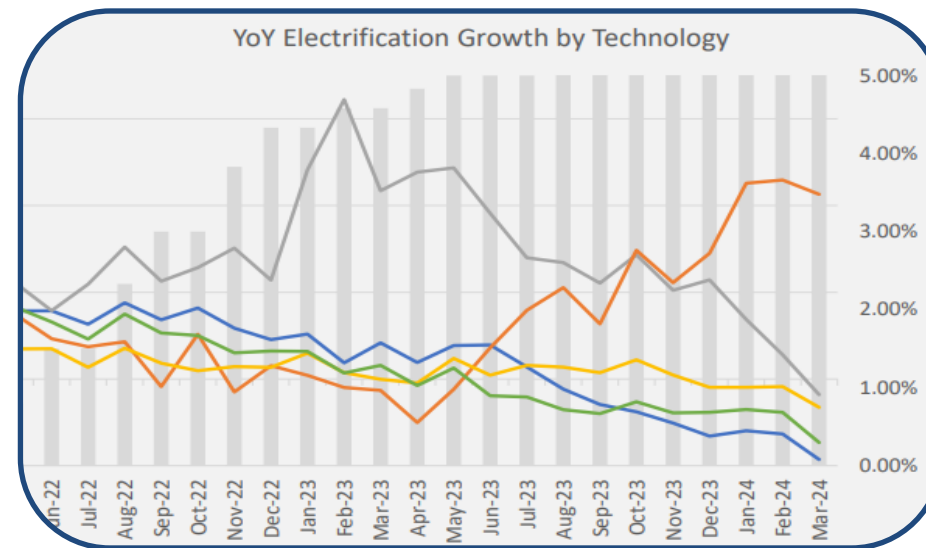
# Ohm Analytics Coverage

\*Each module includes web platform access, respective reporting, and policy tracking



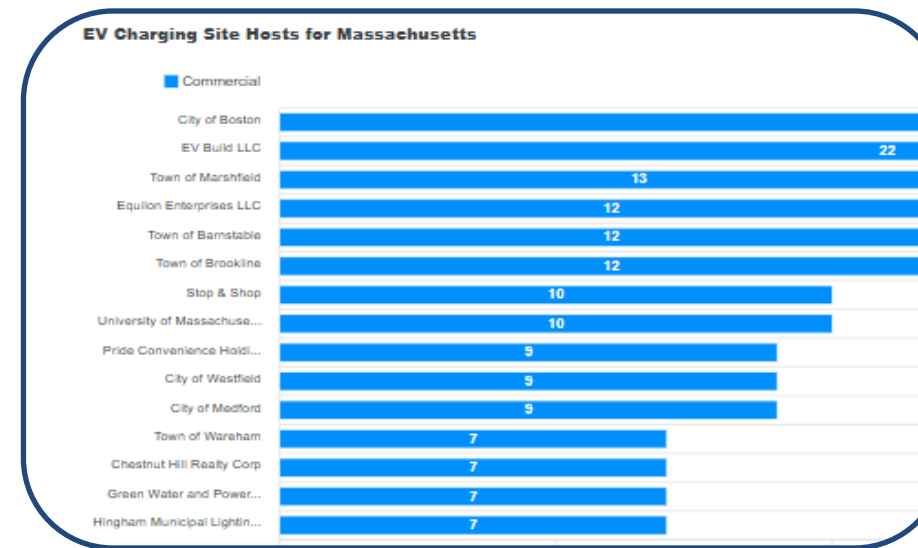
## Solar & Storage:

- Access Weekly Policy & Program Updates
- Monthly & Quarterly Industry Market Reports on National and State Growth Markets
- Residential and C&I Forecasts
- State Attachment Rates & PV Penetration
- Installer and OEM Market Share



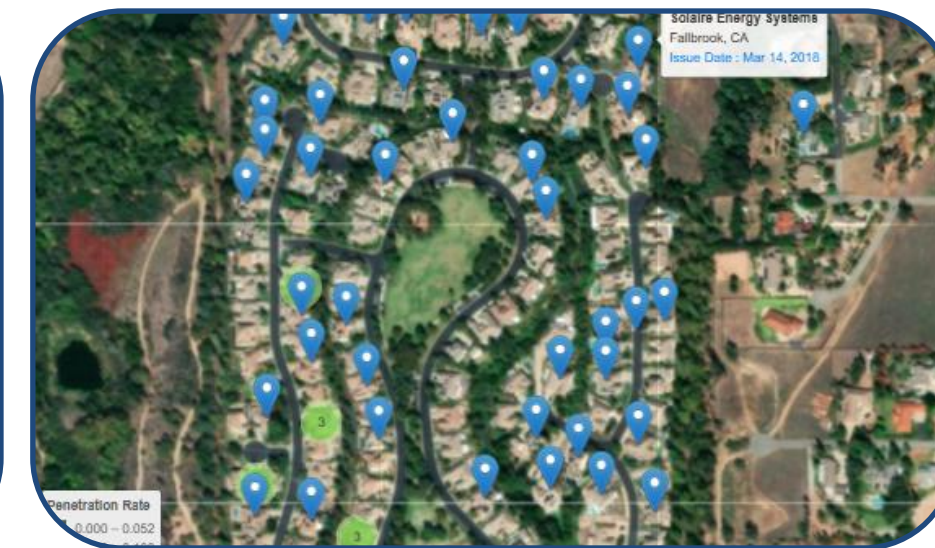
## Built Environment:

- Track DER Consumer Buying Behavior
- Electrification Report – Heat Pumps, MPU, EV adoption
- HVAC installer network
- Electrification Policy & Program Tracking



## Electric Vehicle Charging:

- Project-level detail on segment type (multi-family, fleet, etc.)
- Active RFPs, top contractors by state
- Quarterly State of EV Market Report
- OEM and Network Market Share by State
- Top site hosts for charging

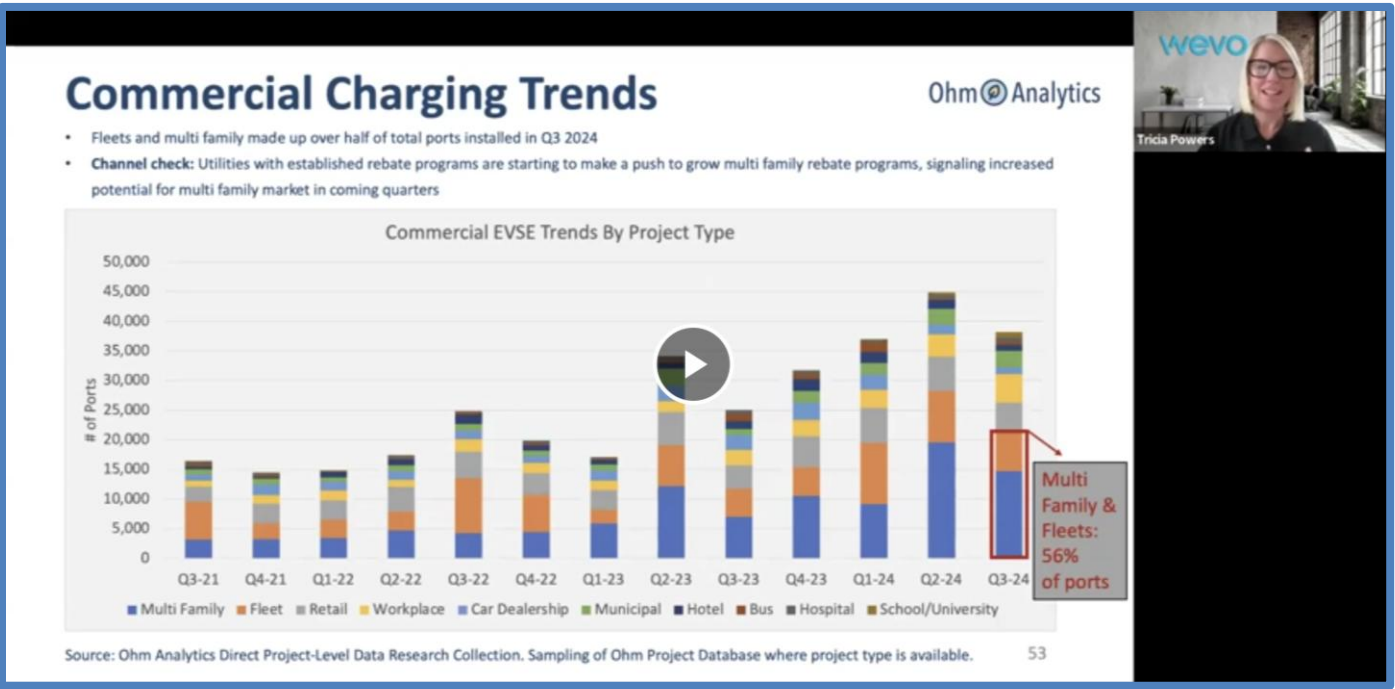


## VPPs & DER-to-Grid Insights:

- National and Utility VPP & Storage Program Trackers
- VPP Research & Reporting
- Map Tool of DER Installations

# Webinar Opportunities

- **Opportunity:** Preview your offers and perspectives on the market together with the Ohm team
- **Audience:** 200-400 attendees average per webinar – mix of utilities, developers, installers, hardware companies, software companies, and investors
- **In Practice:** We'll work together to pick a topic, promote it to our networks, and provide you with contact details of attendees



**EVPower Insights**

**Webinar: The Future of EV Charging in the Multi-family Market**

Tuesday, March 4, 2025 | 3 p.m. ET

Ohm Analytics | AUTOMOTIVE CHARGING SOLUTIONS | 3V Infrastructure | AUTEL

**Larson Burack** Product Manager  
**Steve Krueger** CEO & Co-Founder  
**Aubrey Gunnels** CEO & Co-Founder  
**Dario Pagani** Dir of Mktg & Communications

Brought to you by:  
AUTOMOTIVE CHARGING SOLUTIONS  
ACSGo.net

Complimentary Live Webinar

**Decoding the Solar Industry**  
With Real-Time Data & Expert Policy Insights

Market Intelligence for the Distributed Energy Transition

**Michael Dunn** Sr. Manager, Market & Policy Qcells  
**Chris Collins** Founder Ohm Analytics  
**Rohan Humphrey** VP of Research Ohm Analytics

WEDNESDAY May 7, 2025

ONLINE 9:00 AM PT 12:00 PM ET

Ohm Analytics

Included in Subscription

Ohm Analytics



# Ohm Data Analyst Team & Custom Support

Unlimited access to our analyst team to answer specific questions based on our data – examples below:

*Identifying most active contractors in the Multi Family market to compare against current contractor CRM*

Ohm Analytics						
Multi Family EV Charging Ports Installed By Contractor 2021-Present						
State	Developer/Contractor	Website	Q3_23	Q4_23	Q1_24	Q2_24
CA	Green Water And Power	http://greenwaterandpower.com	138	470	400	942
CA	Chargie	https://www.chargie.com/	60	53	267	928
NY	Net Power Electric Corp	https://www.netpowerelectric.com/	117	237	20	218
NY	Dvm Electric	https://dvmindustries.us/	66	341		33
NY	Ohr Chodosh Elec'L Cont I	https://www.ohrelectric.com/	108	40	80	120
CA	Sitelogiq	https://www.sitelogiq.com/	28		86	63

*Identifying auto groups installing the most EV charging to inform dealership outreach campaign*

Ohm Analytics			
# of Charging Projects By Auto Group 2021-Present			
Auto Group	City	State	# Projects
Autonation	National		39
Tonkin Auto Group	Hillsboro	OR	18
Lithia Auto Group	Spokane	WA	17
Germain Auto Group	Columbus	OH	15
Flow Auto Group	Winston-Salem	NC	11
Suburban Auto Group	Troy	MI	10
Southern Auto Group	Chesapeake	VA	9
Maita Auto Group	Sacramento	CA	9
Luther Auto Group	St. Louis Park	MN	9
DCH Auto Group	Old Bridge	NJ	9
Phil Long Group	Denver	CO	8
Hendrick Auto Group	Charlotte	NC	8
West Hills Auto Group	Bremerton	WA	7
Crowley Group	Bristol	CT	7
Airport Marina Ford	Los Angeles	CA	6
Causeway Family Of Dealerships	Stafford Township	NJ	6
Unstoppable Automotive Group	Temecula	CA	6
Riverside Auto Group (CA)	Riverside	CA	6
Leith Auto Group	Raleigh	NC	6
Larry Miller Auto Group	Lakewood City	CO	6

*Identifying L3 charger growth YoY*

Ohm Analytics					
Total L3 Ports By Year					
Power Level	Project Type	2024	2025	2026	2027
300-500 kw	CPO	3,150	3,165	3,627	4,449
120-180 kw	CPO	2,441	3,277	5,185	9,324
<100 kw	CPO	1,181	1,344	1,813	2,790
720 kw+	Fleet	63	101	182	360
300-500 kw	Fleet	230	328	546	1,020
120-180 kw	Fleet	793	884	1,128	1,679
<100 kw	Fleet	814	960	1,382	2,221
300-500 kw	C-Store/Gas	693	773	1,019	1,526
120-180 kw	C-Store/Gas	462	622	985	1,772
<100 kw	C-Store/Gas	90	93	112	148
300-500 kw	Muni/Utility	128	162	245	423
120-180 kw	Muni/Utility	64	93	156	294
<100 kw	Muni/Utility	96	89	89	83
Total		10,206	11,893	16,469	26,089

# Ohm Data Network

*Thousands of data sources create unique, integrated, and comprehensive view of the electrification of the U.S. Grid*



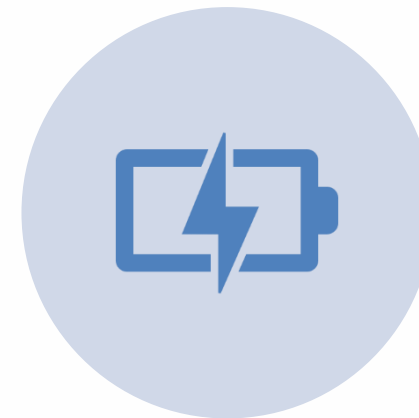
**AHJs:** Relationships with 2000+ municipalities across the US to access building permits



**Utilities and States:** Aggregating data from federal state, and utility programs rich with timeline and equipment detail



**Contractors and Developers:** Network of 700 solar & storage, EV charging, and HVAC installers active on the platform, many providing project level records & OEM details



**Partnerships:** Partnerships with software and other services providers to form proprietary data sets

# VPPs & Grid-Edge Insights



# VPP Market Reports & Research

- Collaborated with the DOE on the *Pathways to Commercial Liftoff: Virtual Power Plant 2025 Update*
- Co-authored RMI's 2025 VP3 Progress Report *From Awareness to Action*
- Creating a VPP market report with market share, deployment, and program growth data

Ohm Analytics

## Ohm Analytics H1 2025 VPP Market Report

Market intelligence for the distributed energy transition.

CONTACT:

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Offices: Boston & San Diego  
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## VP3 Progress Report

APRIL 2025

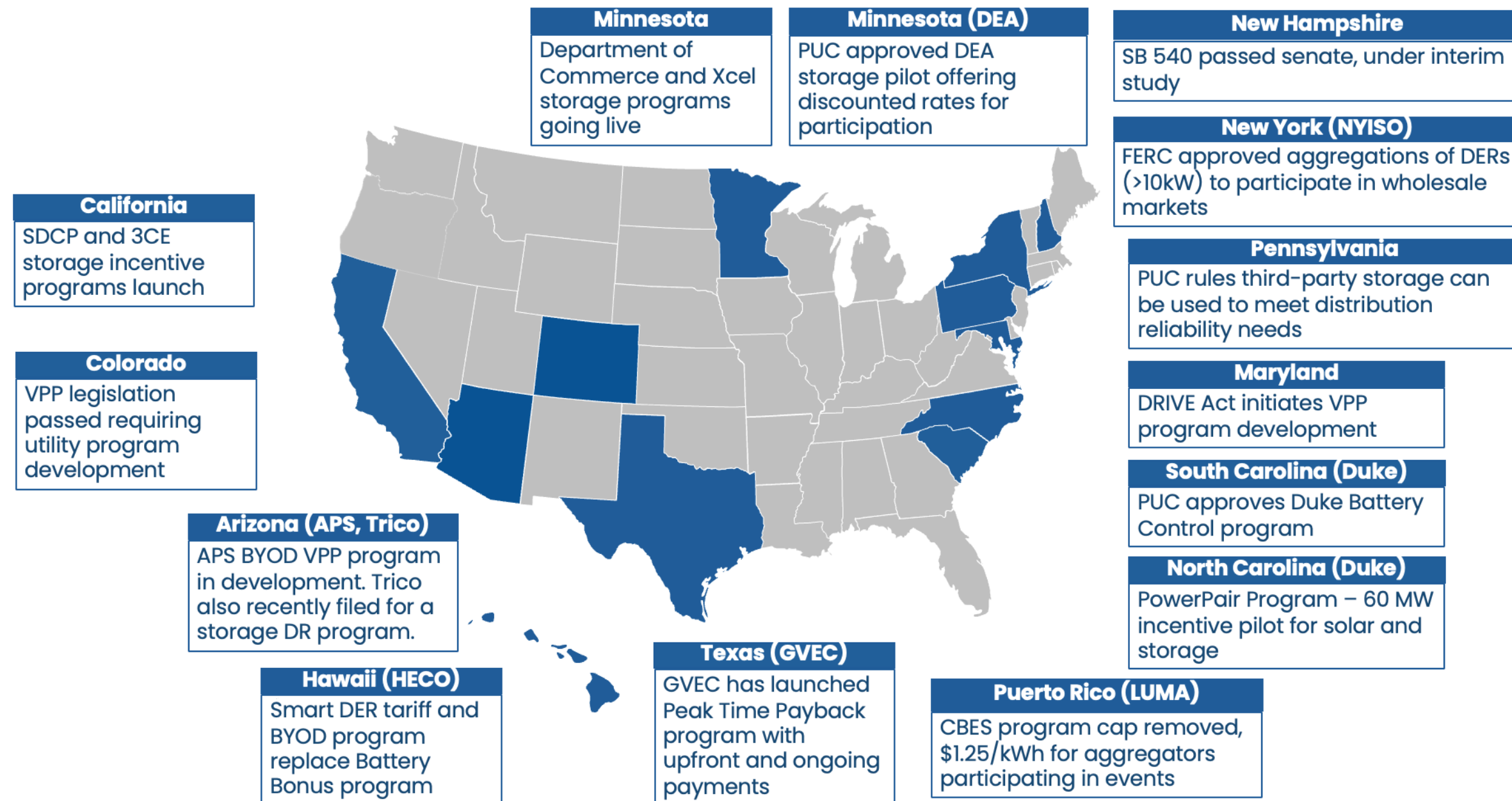
From Awareness to Action



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# VPP & Storage Incentives

- Ohm tracks VPPs and ESS incentives, capturing details on live and in-development programs throughout the U.S.





# VPP Program Tracking

- **VPP Program Monitor:** Track program data across the U.S., filtering by region, utility, tech type, segment, status, capacity, and aggregator
  - See program and incentive details, approved OEMs, program contacts, and recent updates

CA Demand Side Grid Support (DSGS) Program

VPP Program Snapshot

VPP Program Name:	CA Demand Side Grid Support (DSGS) Program
Incentive Program Name:	
VPP Status:	Live
Incentive Status:	
All Tech Types:	BESS, PV, EV/Charging, Smart thermostat, Smart Panels, Other
Segments:	Residential, C&I
Recent Update Date or Added Date:	04/14/2025
Est. Current Capacity (MW):	557.45
VPP Management:	Third party or Utility
VPP Enrollment:	Third party or Utility
VPP Aggregator:	Third Parties: Enersponse, Everbright, Flip Energy, Generac, Leap, Lunar Energy, Renew Home, Olivine, Powerflex Systems, Sunnova, SunPower, Sunrun, TotalEnergies, Stem, Inc, Enel X North America, Tesla, 38 Degrees North, GoodLeap. Utilities: Burbank Wate

Recent Updates

4/25: The CEC has approved the DSGS Program Guidelines Fourth Edition, finalizing Incentive Option #4 as well as modifications to other options.

Contacts

Payam Normand - DSGS Program Supervisor

Guadalupe Corona - DSGS Program Specialist

VPP Program Description

Through the DSGS program, aggregators of customers are paid for demand response. Around 20 third party aggregators are currently enrolled and 3 non-IOU utilities also participate in the program.

Incentive Program Description

The DSGS Program offers incentives for all behind-the-meter storage systems in the state (except those already enrolled in CPUC-run demand response or load reduction programs) to reduce customer net load and provide backup generation to the grid during extreme events. Customers enroll through an aggregator and are compensated for upfront capacity commitments and for per-unit reductions in net load. There are four incentive options: Standby and Energy Payment, Incremental Market-Integrated Demand Response Capacity Pilot, Market-Aware Behind-the-Meter Battery Storage Pilot, and Market-Aware Load Flexibility Pilot. DSGS Program funding is authorized under AB 205, AB 102 (Ting, Chapter 28, Statutes of 2023), AB 107 (Gabriel, Chapter 22, Statutes of 2024) and SB 108 (Wiener, Chapter 35, 2 Statutes of 2024).

VPP Program	Region	Utility	Incentive Program	VPP Status	All Tech Types	Segment
<input type="text" value="Search VPP Pr"/>	<input type="text" value="AZ"/>	<input type="text" value="All Utilities"/>	<input type="text" value="Search Incentive F"/>	<input type="text" value="All Statuse:"/>	<input type="text" value="All Tech Ty"/>	<input type="text" value="All Segmer"/>
<a href="#">APS Battery Pilot Virtual Power Plant</a>	AZ	Arizona Public Service		Live (Closed to new enrollments)	BESS	Residential
<a href="#">APS BYOD Virtual Power Plant Pilot</a>	AZ	Arizona Public Service		In Development	BESS	Residential
<a href="#">APS C&amp;I Peak Solutions DR Program</a>	AZ	Arizona Public Service		Live	Other (load curtailment)	Commercial



# Weekly VPP/Policy Updates

- **VPP and DR Insights:** Analyst notes on legislative, regulatory, and utility actions impacting the VPP market from conversations across the industry, delivered straight to your inbox

## Ohm Analytics

Hi there,

Below are our notes from recent conversations with utilities and industry players across the VPP market, as well as updates on regulatory, legislative, and industry developments.

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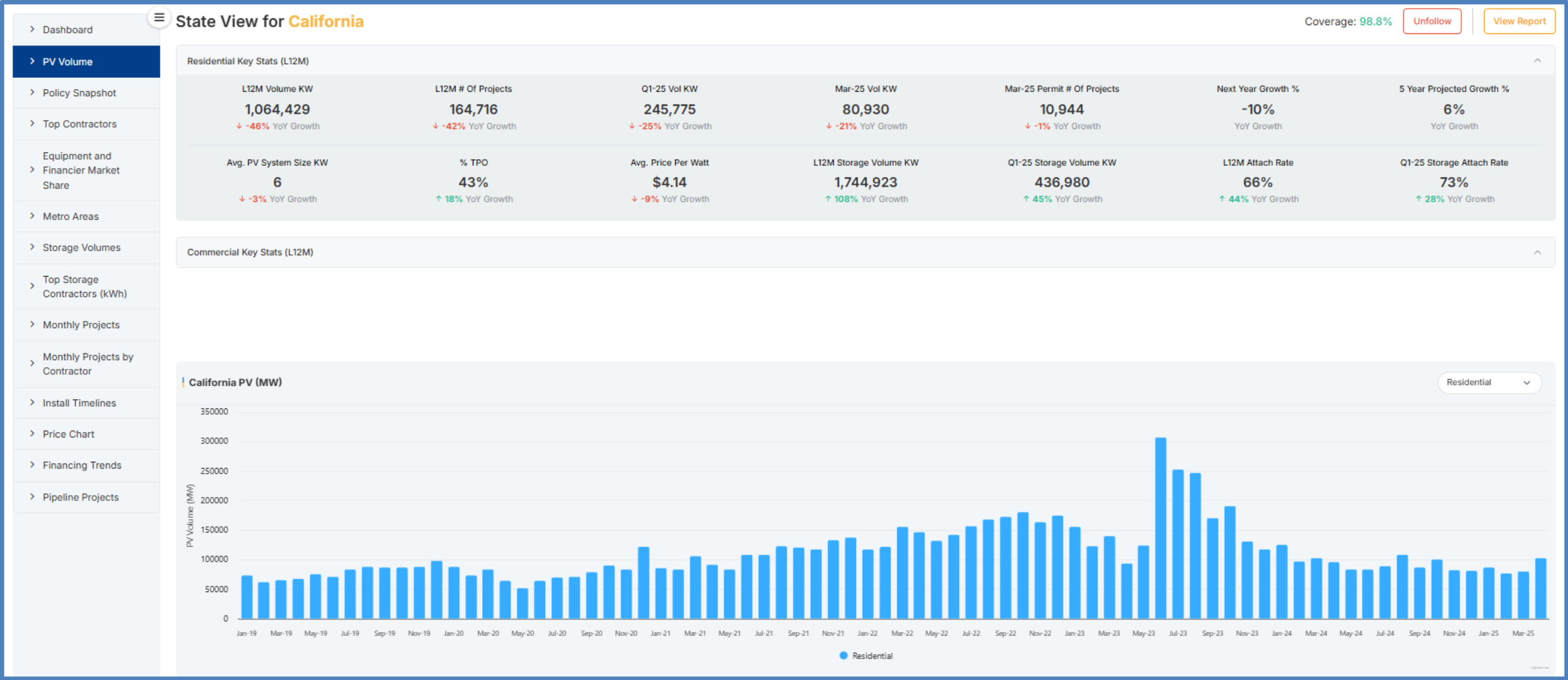
### Ohm Notes & Commentary

**Utility:** Our team spoke to the program manager for the largest second largest BESS VPP program in the U.S., who described their VPP as one of four levers they can utilize for demand response. **Through their BESS VPP they anticipate an additional 50 MW of capacity available for dispatch this summer**, with other tools including incentivizing consumer behavioral demand changes, requesting local government reduce demand at their buildings, and calling on back-up generators in emergencies while still complying with EPA and local environmental regulations.

# Solar & Storage

# Solar & Storage State Level Trends

- Follow state level or regional markets and see details on active installers, market size, utility specific PV, ESS, and VPP programs





# Interactive National Policy and Program Tracking

- State-level Policy, Incentive, Rebate Programs for electrification adoption and benchmarking

### Search Policies

508 policies found

#### Search Incentives and Programs

Policy Name

State

Technology Type

Segment

Entity Size

All

Policy Status

All

Policy Type

All

Incentive Type

All

Updated Date

All

Reset Filters

#### Demand Side Grid Support (DSGS) Program

Live

Entity Size: State

Updated Date: 6/9/2025

Technology Type: Solar Photovoltaic and Energy Storage Systems

State: California

Policy Type: Incentive

Segment: Residential, C&I

Incentive Type: Performance Incentive

The DSGS Program offers incentives for all behind-the-meter storage systems in the state (except those already enrolled in CPUC-run demand response or load redu [...])

Read More

#### California Net Billing NEM 3.0

Live

Entity Size: State

Updated Date: 6/3/2025

Technology Type: Solar Photovoltaic and Energy Storage Systems

State: California

Policy Type: Incentive

Segment: Residential, C&I

Incentive Type: Net Metering

NEM 3.0, California's third Net Metering policy, started on 04/15/2023. It credits customers via an avoided cost calculator, reducing export rates by ~75%. Appli [...]

Read More

#### Community Renewable Energy Grant Program

Live

Entity Size: State

Updated Date: 6/2/2025

Technology Type: Solar Photovoltaic and Energy Storage Systems

State: Oregon

Policy Type: Incentive

Segment: Residential, C&I, Community

Incentive Type: Fund, Grant, Loan

The HB 2021-established Community Renewable Energy Grant Program in Oregon offers funding for renewable energy and energy resilience projects. With a \$64.73 mil [...]

Read More

#### Tariffs on Aluminum and Steel Imports

In Development

Entity Size: National

Updated Date: 5/30/2025

State: National

Policy Type: Regulatory

Segment: Resi, C&I, Community

Technology Type: Solar Photovoltaic Systems

White House Proclamations 9704 and 9705, issued in March of 2018, placed tariffs of 10% on aluminum imports and 25% on steel imports from certain countries in a [...]

Read More

# National Energy Transition Policy Tracking

- Ohm tracks individual dockets and policy development to inform our network of local and national updates.
- **Policy Emails:** Read the latest policy updates in your inbox each week
- **State-Level Policy Pages:** Review recent policy updates, rebate programs, and incentives for each state



Ohm California Policy Snapshot

Ohm Notes

- (-) Increased NEM 3 project volume in 2025 offset by lack of NEM 2 backlog
- (+) High and rising utility rates and local CCA programs helping improve payback periods for PV+ESS
- (-) \$24 fixed charges and reduced \$/kWh pricing going into effect in Q4 2025/Q1 2026

Current Year Outlook:

Negative 2025 YoY Growth: - 10% (P)

OhmAnalytics

Hi Jennifer,

This week’s solar and storage policy alerts include updates from CA, NJ, NV, IL, MN, IN, and NM, and are shown below.

Solar and Storage Policy & Incentive Updates

CA - Bill Eliminating Grandfathering for Some NEM 1&2 Customers Passes Assembly

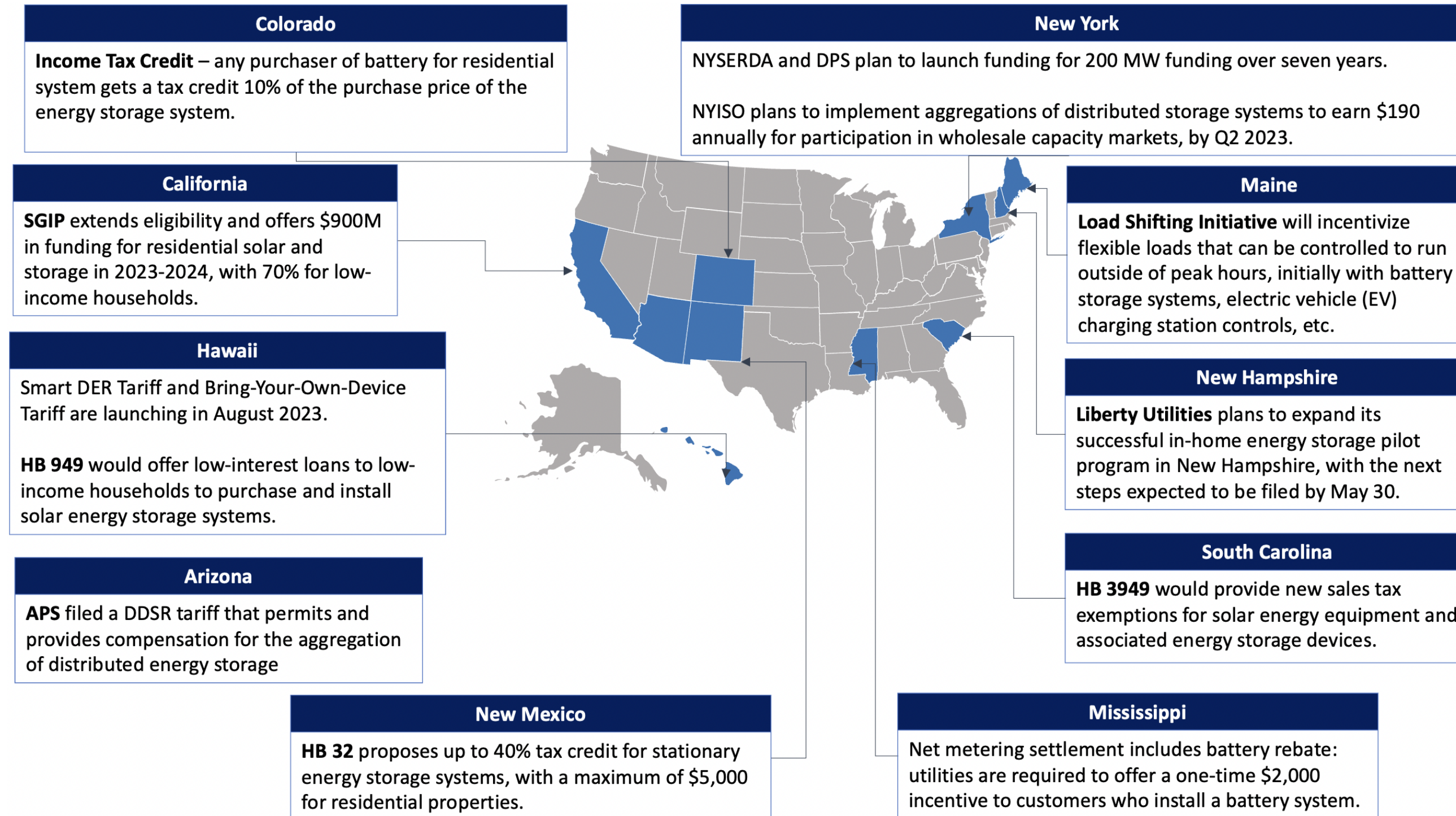
AB 942, a bill that would terminate grandfathering for NEM 1 and NEM 2 customers upon sale of their homes and transition the owner to the NEM 3 tariff, passed in the state Assembly. Given the annual number of home sales in CA is ~220,000 and the high penetration rate of solar (~25%), it is estimated that this could affect up to 50,000-60,000 solar home sales each year. AB 942 is currently under review in the state Senate and will take effect January 1, 2026, if approved.

NJ - Bill Requiring Automated Residential Solar Permitting Passes Assembly

A 5265, a bill that would mandate departments, enforcing agencies, and contractors be provided a “State Smart Solar Permitting Platform,” has passed in the state Assembly. The bill would require local enforcement agencies to allow applicants to submit permits for residential solar systems through the State Platform or an

The Ohm Analytics logo, featuring the word "Ohm" in a dark blue serif font, followed by a circular icon containing a stylized orange and yellow flame or leaf, and then the word "Analytics" in a dark blue sans-serif font.

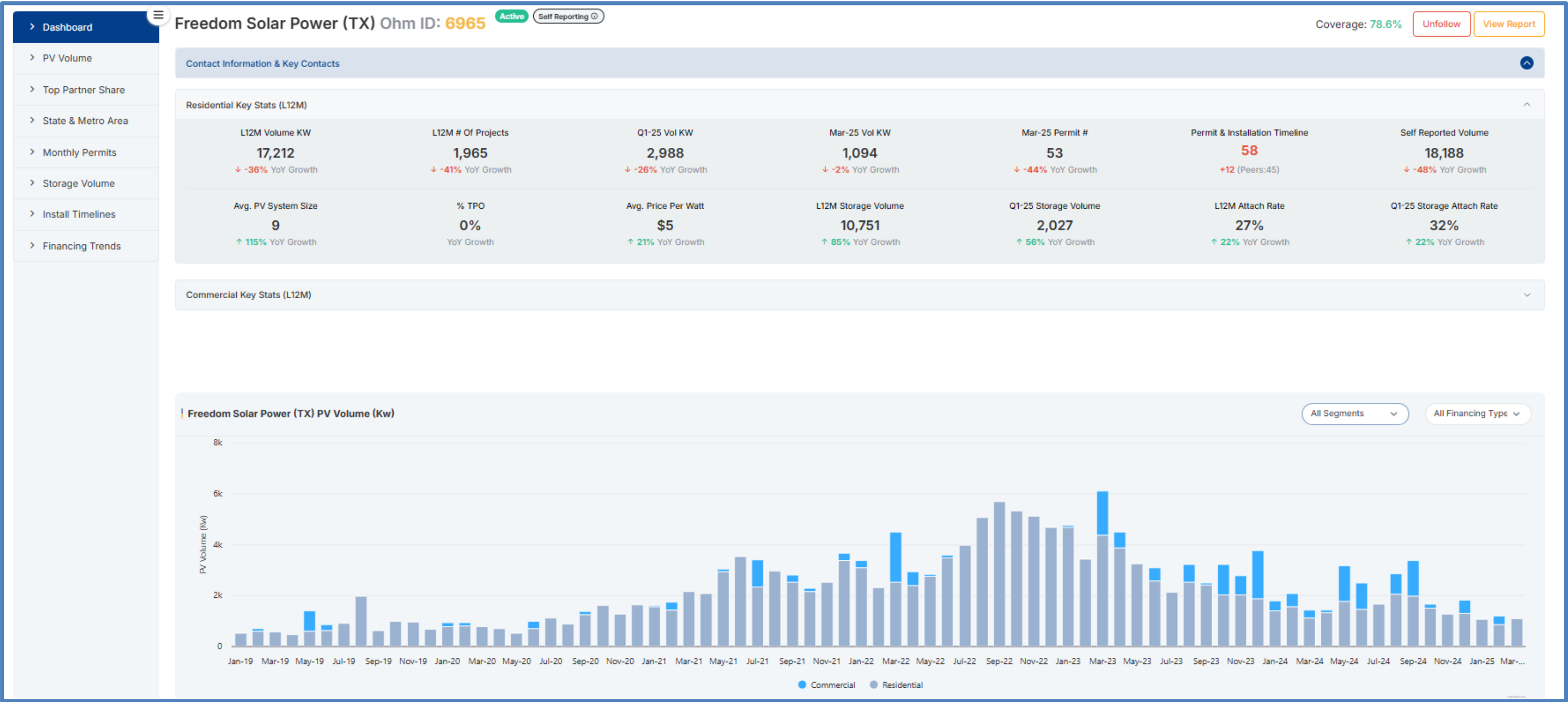
# New and In-Development Regional Incentives





# Solar & Storage Contractor Detail

- Identify top installers across national or local markets and see details on their performance



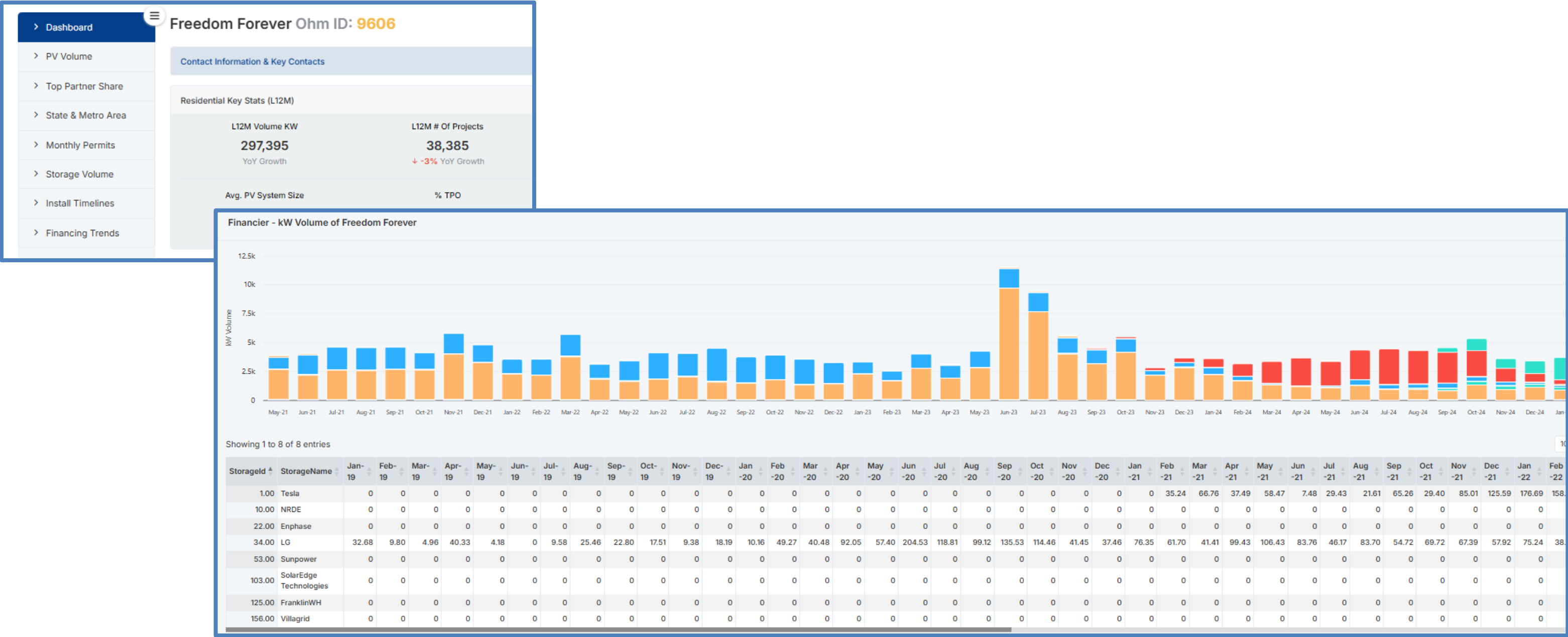
# Contractor Detail: Hardware Market Share

- See which installers are adopting specific hardware vs. their competitors by state and incentive programs



# Contractor Detail: Real-Time Financing Trends

- Unique, granular data on financier partnerships and trends by installer





# Detailed Company Profiles

- 1,000s of company profiles with key contacts, partner relationships and in-service and in development project data

Pivot Energy Ohm ID: 22328 | Corporate Name: TCA MICR

Contact Information & Key Contacts

Contact Information

info@pivotenergy.net

(888) 734-3033

1644 Platte Street Floor 4, Denver, CO 80202

www.pivotenergy.net

Partners

Partner	#1	#2
Module	Q Cells	Canadian Solar
Inverter	Chint Power	Solaredge
Software	Energy Toolbase	HelioScope
MountingAndRacking	PANELCLAW FR	

Key Contacts		
Name	Position	
Tom Hunt	Chief Executive Officer	
Jeff Peterson	Chief Financial Officer	
Brian Albert	SVP, Biz. Dev. & Marketing	
Jon Sullivan	SVP, Project Development	
Mike Sloan	Partner	
Richard Gilker	Partner - Engineering	
Rick Hunter	☆	Chief Strategist
Daniel Merkle	☆	Director of Business Intelligence
John Bernhardt	☆	Director of Policy & Market Strategy
Bret Labadie	☆	VP, Capital Markets
Mat Elmore	☆	VP, Head of Business Development
Megan Roquemore	☆	Director, IT Solutions
Gordon Woodcock	☎✉	Project Development, Community Solar
Jack Copus	☎✉	Partner - Development
Yuchen Liu	☎✉	
Richard Gilker	☎✉	VP-Design & Engineering, Co-founder
Lynette Ottinger	☎✉	VP of Operations
Gentry Rouse	☎✉	Senior Project Developer

# Detailed Project Database

- Detailed database of solar and storage projects in service and under development across all segment –community solar, commercial and utility scale.

Project Summary

Type Project Name

Select State

Select Project Stage

Select Technology Type

Select Segment

Select PV Kws

Select Battery

In Service Date

Due Date

Pipeline Projects

Select Install Type

Select Financing Type

Parties

Pipeline Projects

Showing 1 to 25 of 26,281 entries

25 entries per page

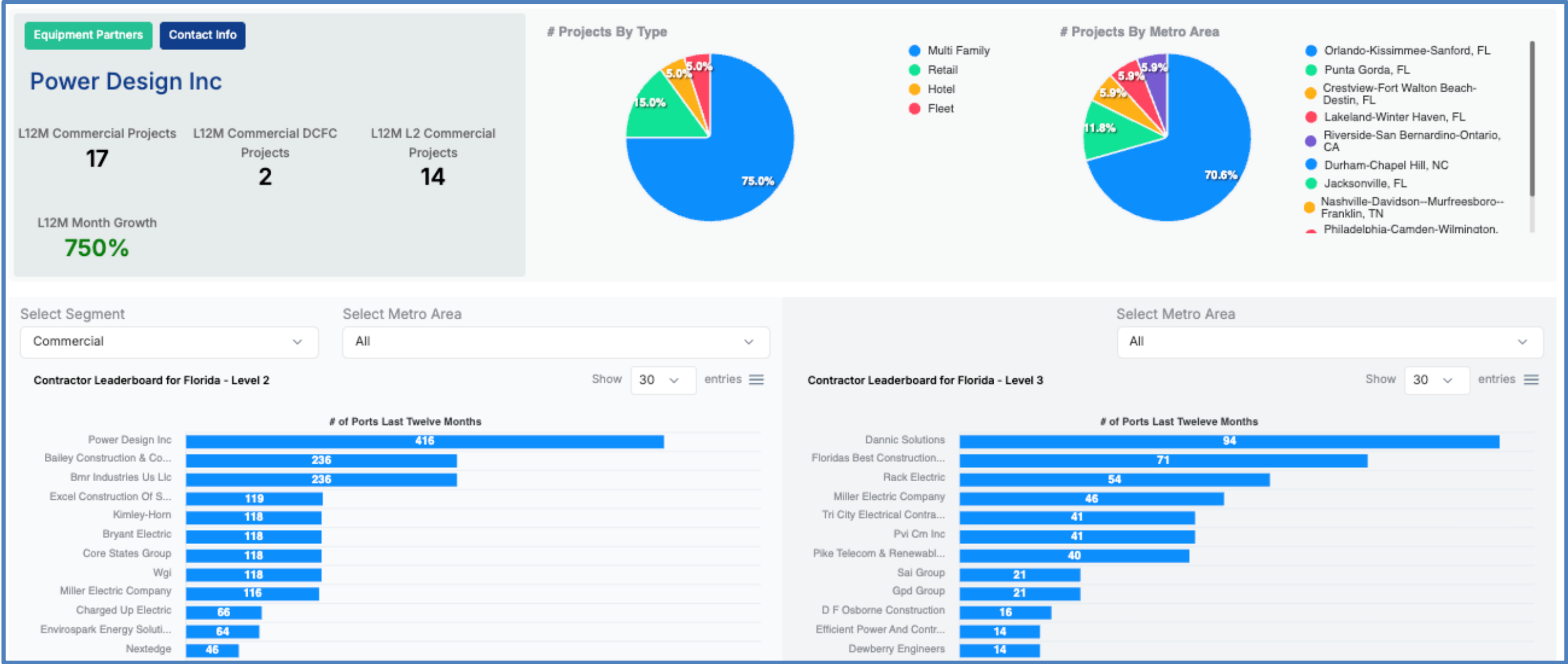
PP Id	Added to Ohm	Project Name	Project Stage	Technology Type	Contractor	App Date	In-Service Date	Due Date	Business	City	State	County	PV kW	Batt kW	Segment	B/
Sea	Search Addec	Search	Search Proje	Search Technolo	Search Contractor	Search /	Search In-Serv	Search I	Search I	Search I	Sea	Search Cour	Search	Search	Search Segr	
132777	2025-06-12	<a href="#">SOL25-0052</a>	Permitting	PV	<a href="#">Xcel Energy</a>	2025-06-04				Pierce	CO	Weld	473		Commercial	
132778	2025-06-12	<a href="#">SOLG-25-0014</a>	Permitting	PV		2025-06-05				District 10	CA	Yuba	372		Commercial	
132779	2025-06-12	<a href="#">Good Oak Solar Farm</a>	Early Stage	PV	<a href="#">OneEnergy Development</a>		2027-12-31			Lewiston	WI	Columbia	98,400		Utility	
132780	2025-06-12	<a href="#">SV CSG Plato Solar 1</a>	Construction	PV	<a href="#">SunVest Solar Inc</a>		2025-06-30			Elgin	IL	Kane County	4,250		Community Solar	
132781	2025-06-12	<a href="#">Kimmel Street Solar 1</a>	Early Stage	PV	<a href="#">Greenkey Solar</a>		2027-03-01			Elkville	IL	Jackson County	4,990		Utility	
132782	2025-06-12	<a href="#">Sybert Branch Solar</a>	Construction	PV	<a href="#">ENGIE North America</a>		2025-12-31				TX	Milam	260,000		Utility	EF
132783	2025-06-12	<a href="#">Jacob's Ladder Solar 2</a>	Early Stage	PV	<a href="#">Greenkey Solar</a>		2026-12-04			Sheridan	IL	Unknown	4,500		Utility	

# Electric Vehicles



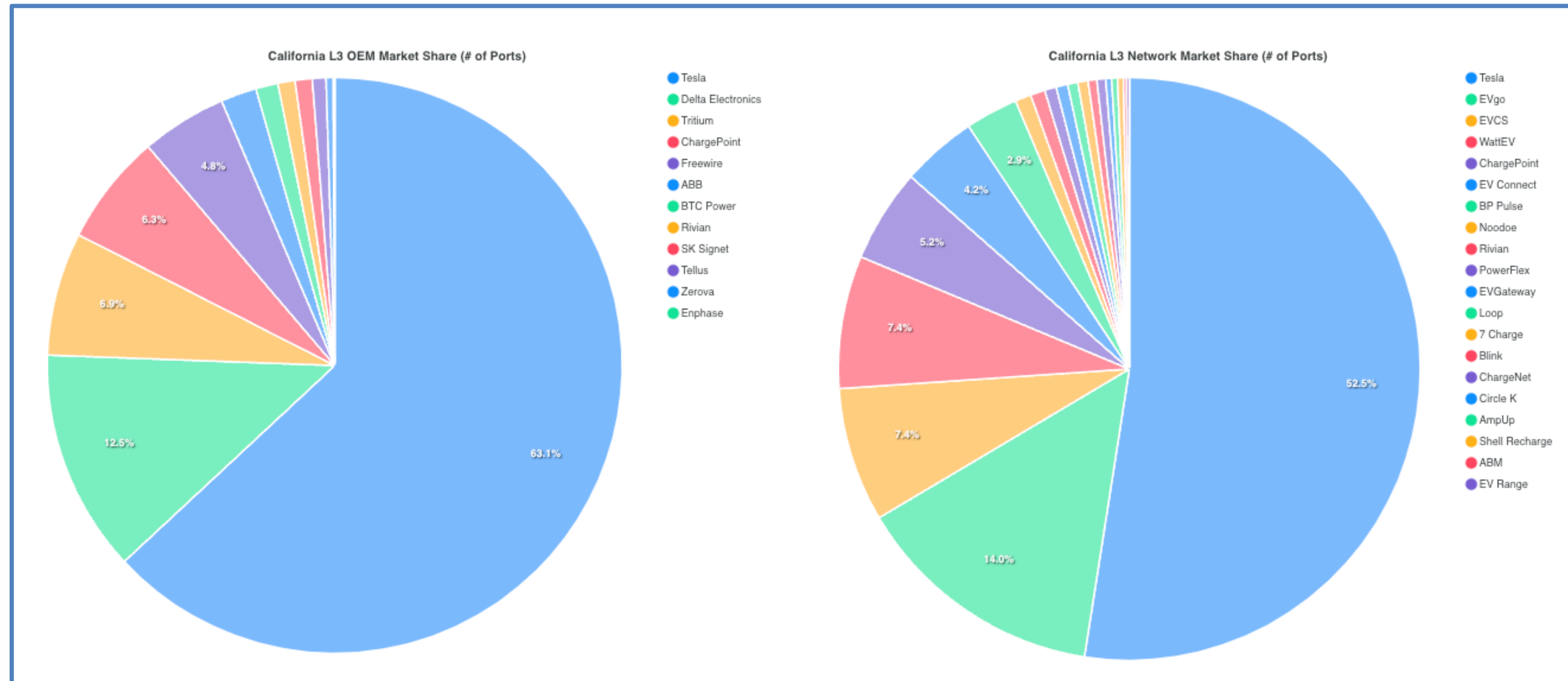
# C&I EV Charging: Contractor/Developer Detail

- Target the most active L2 and L3 developers in each state to deploy the most projects, run product education campaigns, perform due diligence on partners
- Find the right install partners for your target project segments + be specific in your partner



# C&I EV Charging: Contractor/Developer Detail

- Evaluate competitive landscape in each state for residential, commercial L2 & L3 charging
- Keep your finger on the pulse of the fastest growing/most adopted technologies



# US EV Charging Quarterly Reports

Holistic, deep dive into U.S. EV Charging Market, using project level detail not available from traditional research firms in the industry covering:

- Monthly and quarterly market totals for L2, L3, and by project vertical (fleets, multi family, retail, etc.)
- Utility and state incentive program tracking
- Federal policy and funding updates
- Deep dives into the multi family and fleet charging markets
- Top L2 and L3 developer leaderboard
- Analysis on EV charging site hosts, and their projects
- Market shares of CPOs and EVSE OEMs
- Single-family charging market breakdown

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## Ohm Analytics Q4 2024 US EV Charging Market Report

Market intelligence for the distributed energy transition.

CONTACT:

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Teddy Storrs, EV Research and Policy Analyst: [teddy@ohmanalytics.com](mailto:teddy@ohmanalytics.com)

Offices: Boston & San Diego

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*From the Ohm Analytics Q4 2024 Report Released 3/10/2025*




# EV & Electrification Program Tracking

- Reporting on EV and electrification legislative updates
- Insights and data from state- and utility-level incentive programs
- Forecasting on adoption trends for home electrification


# Policy Landscape: MA Case Study

Ohm<sup>2</sup> Analytics


Massachusetts has multiple programs which encourage or mandate electrification. Varying legislation at the state and city level can make compliance complicated but robust funding sources are available to help lower the costs of electrification.




U.S. DEPARTMENT OF  
**ENERGY**



**mass save**



**MassDEP**



## Home Energy Rebates

- Federal funding from IRA
- \$73.2 million for HER
- \$72.8 million for HEAR

MA's deployment plan:

- \$22 million for Municipal Light Plant (MLP) rebate programs
- \$50 million for affordable housing decarbonization
- \$72 million (all HEAR funds) to focus on upgrades not covered by Mass Save (HP clothes dryer, wiring and panel upgrades)

## Mass Save

- Rebate program funded by MA ratepayers
- \$4.9 billion program budget for 2025-2027
- For residential and C&I customers
- Fossil fuel appliances are no longer eligible for rebates
- HEAT Loan with 0% interest up to \$50,000 for projects
- Funds weatherization, electrification, and demand response programs

## Clean Heat Standard

- Guidance issued by Massachusetts Department of Environmental Protection (MassDEP)
- Program framework being drafted to meet MA's climate goals
- Requires compliance from electricity and fuel suppliers for heat load
- Create marketable Clean Heat Credits from using clean heating fuel and heat pump installations

## BERDO

- Building Emission Reduction and Disclosure Ordinance in Boston
- Sets annual emissions reduction mandates for existing buildings (larger than 20,000 sq. ft. or 15+ residential units) until reaching net-zero in 2050
- Alternative Compliance Payments or renewable electricity supply contract options for buildings that do not meet emissions reduction mandates

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**EV Charging Policy & Incentive Updates**

**OR - \$10.9M in Funding for L2 Charging to be Released**

Oregon announced \$10.9 million in federal grant funds for L2 chargers on July 24, 2024, which will be made available through its Community Charging Rebates Program. The funding for chargers is part of the \$197 million the state recently won from the Climate Pollution Reduction Grant program. The funds will be made available in three rounds: spring 2025, spring 2026, and spring 2027. The Community Charging Rebates Program reserves 70% of total program funds for rural and disadvantaged communities to encourage private investment in EVSE where there are significant gaps in charging infrastructure.

**NJ - Year 5 of Charge Up New Jersey Launches with Rebates for Home EVSE Installation**

The fifth year of the Charge Up New Jersey program opened on July 10, 2024. The program offers a \$2,000 rebate for the purchase of an EV with an MSRP under \$55,000 and a \$250 rebate for the installation of a home charger. Starting in the fall, prequalified income-eligible applicants will be able to receive a \$4,000 rebate for the purchase of an EV. There is currently \$52 million available for vehicle rebates and \$3.8 million available for home charger installations.

**HI - Hawaiian Electric Releases Transportation Electrification Roadmap for 2030**

Hawaiian Electric released its Electrification of Transportation (EoT) Strategic Roadmap 2.0 on July 19, 2024. The plan outlines actions that the utility will take through 2030 to aid in the adoption of EVs. Key actions identified by Hawaiian Electric include expanding its existing make-ready charging programs to multi-unit dwellings and workplaces; designing charging locations for light- and medium-duty fleets; creating a V2G pilot for charging with renewable energy; and piloting V2H technologies as backups for homes during power outages. The plan must be approved by the Public Utilities Commission before it is implemented.

# IRA Deployment Report

Ohm<sup>®</sup>Analytics

18 states are currently in the application process to receive formula funding but only 1 state (NY) has funding available to consumers. States have until January 31, 2025 to apply for funding meaning that some states might not be disbursing funding until late 2025.

## Highlights from Applications

**HI:** 45% of HEAR funds will be allocated for households under the 80% of AMI, 15% of program funds for up to 150% of AMI, 10% for Native Hawaiians

**MA:** HER funds split between Municipal Light Plants and Affordable Housing decarbonization; HEAR funds dedicated to middle-income residents; total funds are roughly 3% of Mass Save's 3-year budget

**ME:** HER funds will be used for multi-family residences, prioritizing low-income buildings; HEAR projects will prioritize heat pump and electric panel and wiring upgrades (HPWH, insulation, air sealing, other appliances are ineligible) for households below 80% of AMI

**RI:** HEAR funds will be used to provide rebates for upgrades that are not already funded through other rebate programs (electric panels, wiring, induction stoves, heat pump clothes dryers) and will be stacked with an additional rebate made available through Regional Greenhouse Gas Initiative (RGGI) funding

## NY Deployment of Home Energy Rebates Funding:

- 1<sup>st</sup> and only state with IRA home electrification funding available
- 4/18/24: \$39.6 million in funding from HEAR approved to expand EmPower+ program
- EmPower+ designed for low- and middle-income residents to carry out core energy efficiency projects including insulation and air sealing. Once these EE upgrades have been made, there is funding available for heat pump HVAC installation.

State	Status
NY	Funding Available
WA, OR, CA, AZ, TX, NM, WI, MI, IL, IN, OH, PA, WV, VA, NC, SC, GA, FL, HI	Application Approved
MT, WY, CO, UT, ID, NV, UT, AZ, NM, OK, KS, NE, MN, IA, MO, WI, MI, IL, IN, OH, PA, WV, VA, NC, SC, GA, FL, HI	Application Submitted
AK, VT, NH, ME, CT, RI, MA, NY, NJ, DE, MD, DC, VA, NC, SC, GA, FL, HI	Application Not Submitted

# Built Environment

# Track State Level HVAC Adoption Trends

- Track State and Metro-Level trends, monthly volumes installed, overall market growth
- Follow market size and growth nationally and region specific

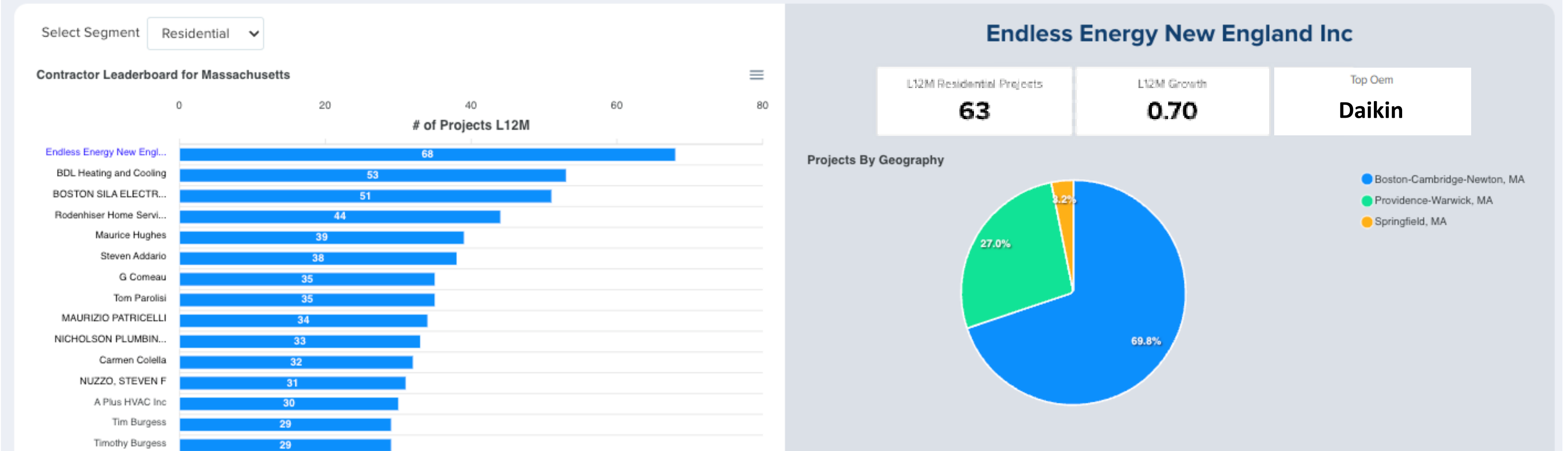




# HVAC Installer Benchmarking and Portfolio Detail

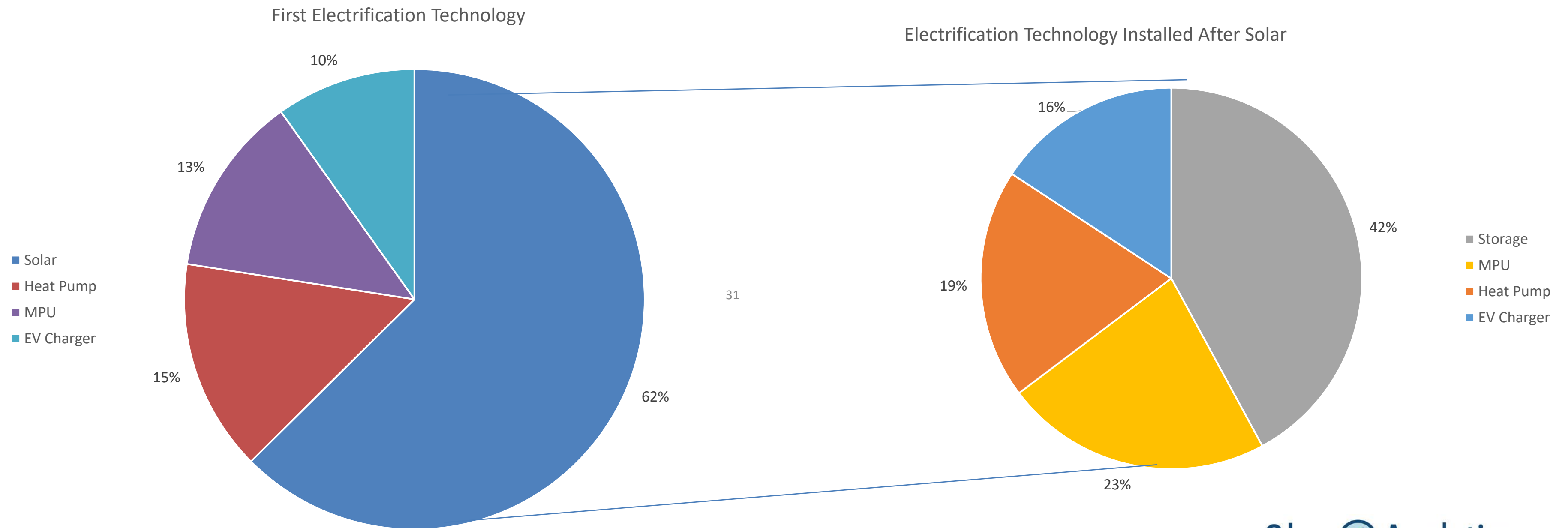
- Discover new partners in your segments and markets
- Keep up with installer activity, their OEM partnerships, and how they stack up in the market
- See which hardware installers are adopting vs. competitors by state and incentive program

## State View for Massachusetts



# Consumer Buying Behavior

- Track consumer adoption of electrification through buying behavior and electrification technology install patterns



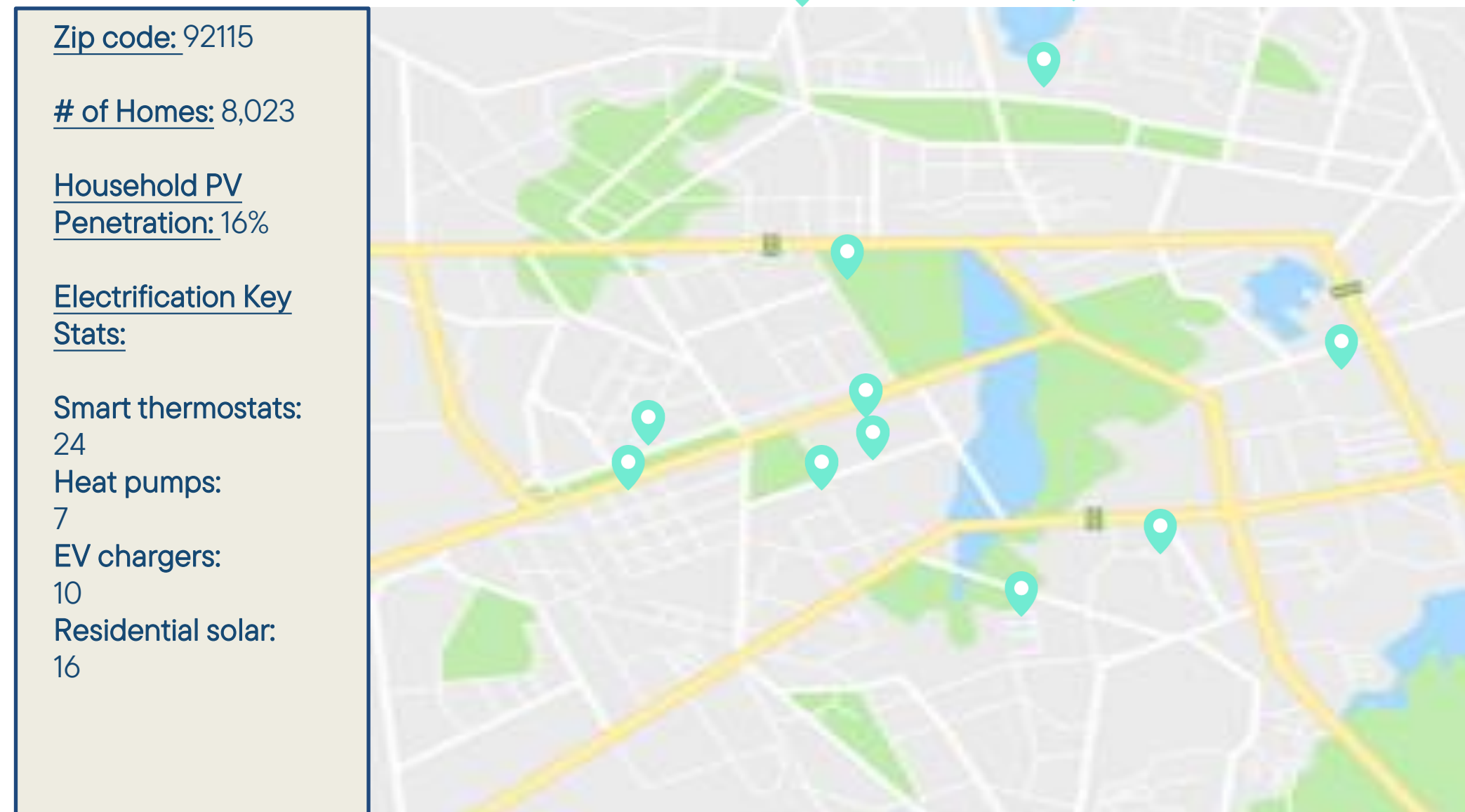
Source: Ohm Analytics Direct Project-Level Data Research Collection. Includes only properties with multiple known electrification upgrades (60,000 addresses) from 2021 - present. May understate EV charging.

# Underlying DER Location-Level Data



# DER Location-Level Data: Track Adoption of Customer Programs

- Use DER location-level data to track adoption and penetration of customer programs
- Drill into zip codes to identify DER equipment installations, existing penetration rates, and regional growth



# Download Underlying Datasets

Access datasets for analysis of electrification adoption within your territories – Example: Sampling of heat pumps installed in Nevada



NV Heat Pump Install Data Sample						
Permit Number	issueDate	Address	City	State	Description	OEM
BOTH2021149932	6/23/2021	2813 Prickley Pear	HENDERSON	NV	trane 5 ton 16 seer heat pump package	Trane
BOTH2022205998	6/23/2022	695 Telegraph Hill	HENDERSON	NV	trane 3 ton 14 seer split heat pump system	Trane
BLD23-04887E	11/11/2022	6855 S Virginia St Na	Reno City	NV	the existing dehumidification system	Samsung
SBLD23-20800	3/7/2023	4608 Firtree Ln	Sparks	NV	conditioning systems with like for like	Ruud
BOTH2022213514	8/15/2022	379 Seine	HENDERSON	NV	system	Rheem
BOTH2022221507	10/12/2022	607 Buchanan	HENDERSON	NV	unit same for same install 2 exhaust fans	Rheem
BOTH2022221508	10/12/2022	607 Buchanan	HENDERSON	NV	unit same for same install 2 exhaust fans	Rheem
BS-22-1036	6/14/2022	1521 E Elderberry St	PAHRUMP	NV	410a refrigerant	Rheem
BS-22-1712	10/24/2022	2491 S Yakima Ave	PAHRUMP	NV	matching air handler14 seer 410a rheem	Rheem
BS-22-2014	12/29/2022	5774 E Ailanto Ave	PAHRUMP	NV	matching air handler14 seer 410a rheem	Rheem
BS-23-341	3/13/2023	2941 S Spy Glass Ave	PAHRUMP	NV	matching air handler 410a rheemalso 25	Rheem
BS-23-74	1/20/2023	5490 E Bridger St	PAHRUMP	NV	matching air handler14 seer 410a rheem	Rheem
WBLD21-100438	2/2/2021	15440 Balsawood Dr Reno Nv 89511		NV	pump 34 ton	Mitsubishi
WBLD21-101867	4/30/2021	7200 Cheltenham Way Reno Nv 89502		NV	pumps 2 ton and 35 ton	Mitsubishi
BLD22-00932	7/28/2021	188 California Ave	Reno City	NV	one mitsubishi heat pump mini split	Mitsubishi
SBLD22-23767	9/29/2022	2350 Wingfield Hills Rd	Sparks	NV	minisplit heat pump systems for first and	Mitsubishi
SBLD23-20485	2/13/2023	2272 Larkin Cir	Sparks	NV	cassette indoor unit replace 1 9000 btu	Mitsubishi
SBLD23-21286	4/12/2023	840 I St 1	Sparks	NV	from the attic supply and install 2 36000	Mitsubishi
BOTH2021133316	3/17/2021	1161 Palmetto Bay	HENDERSON	NV	pump lennox condenser 4ton	Lennox
BS-23-1453	10/24/2023	3940 N Dennis St	PAHRUMP	NV	condenser and airhandler 16 seer	Lennox
BS-23-228	2/21/2023	5700 N Fitzroy Ave	PAHRUMP	NV	4ton 15 seer	Lennox
WBLD23-103289	7/28/2023	6240 Yakima Ct Sun Valley Nv 89433		NV	heat pump system for upstairs master	Fujitsu
DB21-1516	7/28/2021	1364 Bryan Ln	Gardnerville	NV	heat pump to sit at outdoor location single	Fujitsu
BS-23-463	4/26/2023	4680 E Sommerset Ct	PAHRUMP	NV	heat pump system with like	Fujitsu
BCTR2023265866	9/27/2023	1935 Paseo Verde	HENDERSON	NV	minisplit 24k btu single zone at the merrill	Daikin

