

Growing Consensus and New Tools for Action on Phased Infrastructure

December 2023



We are reaching a powerful national consensus around where to start and how to grow charging infrastructure for zero-emission medium- and heavy-duty vehicles (ZE-MHDVs).

There is growing agreement that infrastructure buildout will be targeted and phased in over time, requires less to start than initially thought, and can exceed the pace of vehicle deployments. The deep alignment on these points from multiple studies is now changing the dialogue on infrastructure. It is moving past “where do we start” to “let’s get going.”

TWO MAJOR POINTS OF CONSENSUS

1. It is not necessary to build infrastructure everywhere all at once.

By first targeting areas where ZE-MHDVs will work best initially and charging needs are greatest, then phasing growth to connect these regions, we use the most efficient and effective approach to meet market growth.

2. We know where launch regions are and how they grow.

The powerful unity on this point takes away doubt and provides “no regrets” certainty for policy action and finance. CALSTART’s assessment of [phasing in charging infrastructure](#) identified the key priority freight hubs and emerging corridors where ZE-MHDVs will work first.

Now, new [research](#) from the International Council on Clean Transportation (ICCT) provides strong correlation by confirming the same locations for first action. Interestingly, while ICCT approached the mapping of infrastructure priorities from a different perspective, the outputs of both groups’ work are deeply aligned. ICCT researched the best locations to install the least infrastructure to support the most zero-emission commercial vehicles in the early market.

HIGH PRIORITY LAUNCH LOCATIONS INCLUDE:

- I-5 on the West Coast
- The Texas “Triangle”
- Parts of I-80, I-40, and I-10

Buildout will then grow from these strategic locations. While each organization used different methodologies, both gave high consideration to truck-maker, fleet, and infrastructure-provider inputs.

Another new planning tool also provides a strong signal of where the first charging locations will be. The [eRoadMAP](#) from the Electric Power Research Institute (EPRI) was designed to project electrification needs through 2030. The “hot spots” on EPRI’s map correlate almost exactly with the first freight hubs spotlighted by CALSTART and ICCT for action. EPRI’s forecast, ICCT’s scenarios, and CALSTART’s assessment all align on where first deployment, funding, and corridors must launch.

Most importantly, taken together these three assessments work as a powerful framework for immediate action. Policymakers and industry should use the CALSTART and ICCT work to focus funding and policy on these first, best places to deploy for maximum impact, then use the EPRI tool to get into the rich details of how much energy is needed where and when to support and grow these regions.

The consensus is clear: We know where, when, and how to build out charging infrastructure. Time to act!