

EVSE IN THE FEDERAL MARKETPLACE

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Executive Summary

Recent Executive Action (EA) calls for the federal government to work with industry to achieve 100 percent of light-duty vehicle acquisitions as Zero-Emission Vehicles (ZEVs) by 2027 and 100 percent of all vehicle acquisitions as ZEVs by 2035. To comply with this EA, the General Services Administration (GSA) will leverage industry partnerships to offer the full spectrum of products and services to support agency, department, and bureau electrification goals. As these entities ramp up their electric vehicle (EV) and associated system acquisitions, GSA has been tasked to streamline the government's acquisition process to facilitate a more uniform and rapid deployment of Electric Vehicle Supply Equipment (EVSE). To affect a rapid implementation of the EA, GSA recently awarded Blanket Purchase Agreements (BPA) to sixteen (16) corporations with the objective of standardizing and streamlining the ordering process with hopes that the BPA would reduce administrative burden for contracting officers looking to acquire a range of charging hardware, software, and ancillary services. Institution of the BPA and further development of the offerings with GSA Multiple Award Schedule(s) (MAS) contract holders will, once fully on-line, accelerate the Government's transition to an EV environment.

GSA Contracting Vehicles

In early 2022, GSA negotiated and awarded sixteen (16) BPAs in all, nine (9) of which are with small businesses with varying socio-economic certifications. These BPAs are 60-month agreements and include over 1,165 EVSE products across more than thirty (30) unique EVSE manufactured brands with ordering preferences for small, disadvantaged businesses. GSA anticipates onboarding additional products periodically as they are added to GSA's Multiple Award Schedule(s). Many charging platforms and networked stations are still undergoing GSA IT and security reviews and will not be available for ordering through the GSA BPAs until this process is complete and systems as well are deemed qualified and compliance with Made-In-America and Trade Agreements Act (TAA). Until these products have completed the process, government agencies can purchase through MAS, but will need to evaluate each product at the agency level to ensure it meets all agency-specific privacy, IT, and cyber supply chain requirements. As of 1-February, 2023, all EVSE products covered by the BPA are also currently available on GSA's MAS contracts which can be accessed through [GSA Advantage](#).

In all, EVSE is presently offered to government buyers through the GSA by the sixteen (16) holders of the Blanket Purchase Agreement or from six (6) other entities that offer EVSE via their own GSA MAS contracts. Those twenty-two (22) contracts holders and the manufacturers whose EVSE they offer are show in the following table on the page that follows.

ABM FACILITY SUPPORT SERVICES, LLC GS-07F-5542P	Large Business (LB)	Atom Power, ABB, Blink Charging, ChargePoint, Efacec USA, EvoCharge, EVConnect, Heliox, JuiceBar, Nuwe, Rhombus, SemaConnect, Tritium
AMERESCO FEDERAL SOLUTIONS, INC. 47QSHA21D000R	Large Business (LB)	BTC and EVConnect
APOLLO SUNGUARD SYSTEMS, INC. GS-30F-0029Y	Small Business (SB), Service-disabled veteran-owned small business (SDVOSB)	ChargePoint
BEAM GLOBAL 47QSWA21D0006	Small Business (SB)	Beam Global
CARAHSOFT TECHNOLOGY CORPORATION 47QSWA18D008F	Large Business (LB)	ChargePoint
DISTRICT FLEET, LLC 47QMCA20D001A	Small Business (SB), Small Diverse Business (SDB), Historically Underutilized Business (HUB) Zone	ABB, BTC Power, EVConnect, EVoCharge, Freewire, Garage Juicebar, PowerCharge and Tritium
EATON CORPORATION GS-06F-0023R	Large Business (LB)	Eaton
ENERGY SYSTEMS GROUP, LLC 47QSHA21D001J	Large Business (LB)	
GLOBAL ENTERPRISE, INC. GS-30F-040BA	Small Business (SB)	Livingston Energy, Terra Wallbox
LIOCE GROUP INC., THE GS-03F-0143Y	Small Business (SB)	SemaConnect
OSC SOLUTIONS, INC. 47QSHA18D0023	Small Business (SB), Veteran Owned Small Business (VOSB)	
PACIFIC LIGHTING MANAGEMENT, INC GS-07F-0167X	Small Business (SB), Historically Underutilized Business (HUB) Zone	EVConnect, Clipper Creek, EVLoop, EVSE LLC, SemaConnect
PCS ENERGY, LLC 47QMCA21D000Z	Small Business (SB)	EvoCharge
SIEMENS INDUSTRY, INC. GS-07F-217CA	Large Business (LB)	Siemens
VERDEK, LLC GS-07F-172BA	Small Business (SB)	ABB E-Mobility, AeroVironment, AMPLY Power, ChargePoint, Efacec, EVConnect, EVoCharge, Freewire
WSP USA SOLUTIONS INC. 47QRAA18DOO73	Large Business (LB)	
NON - BPA CONTRACT HOLDERS (W/GSA CONTRACT)		
SEVA TECHNICAL SERVICES GS-21F-089BA	S, SDVOSB	Shield
WRIGGLESWORTH ENTERPRISES, INC GS-21F-0015X	S, WOSB	Schneider, Bosch, Siemens
GRAYBAR 47QTCA19D00DL	Large Business	Schneider
WESTCARB ENTERPRISES INC. GS-21F-0154W	8(a), S/DBE, WO	EVLink, GE
HP ENGINEERING 47QRAA22D004Y	S/DBE	BTC Power
MICROTECHNOLOGIES LLC 47QTCA21D000N	S, SDVOSB	Microtec

Market Analysis

Overview

The U.S. electric vehicle charging infrastructure market size was valued at USD 2.85 billion in 2021 and at just over USD \$5 billion in 2022 and is expected to advance at a compound annual growth rate (CAGR) of 36.9% from 2022 to 2030. The market growth can be attributed to the growing initiatives taken by both public as well as private sectors to encourage the population to switch to electric vehicles (EVs). These initiatives have promoted the sale of electric vehicles and have also spread consumers' awareness about the benefits of using these vehicles. Moreover, the development of technologies like portable charging stations, smart charging with load management, automated payment technology, and bi-directional charging is further expected to create new growth opportunities for the market during the forecast period.

It is expected that electrification of vehicles owned or leased by the Federal government will track with the growth of the commercial vehicle electrification market. Presently the government owns or leases more than 255,000 vehicles excluding the Department of Defense (DOD) and United States Postal Service (USPS). The USPS presently owns more than 235,000 vehicles and has already begun the process of electrifying its fleet by contracting with Oshkosh Corporation to produce an entirely new fleet of EVs to replace the current fleet of delivery vans. Likewise, the DOD maintains a domestic fleet of some 250,000 wheeled vehicles, many of which will be converted to EV as missions dictate.

While the owned, leased, DoD and UPSP make up a small percentage of the overall US vehicle count, further influencing the government market are the number of privately owned vehicles (POV) owned and driven on and off the four hundred fifty-eight (458) Continental United States (CONUS) military bases by military members, their families, contractors as well as federal employees. In all, the government's portion of the national EVSE market while yet to be assessed separately for its sub-market size, is certainly worthy of attention.

Government Market Activity to Date

To date, large scale Federal acquisition of EVSE through the GSA channel has been non-existent and insignificant via other acquisition vehicles. According to data obtained from [USASpending.gov](https://www.usaspending.gov), for all contract holders of all types that have been authorized to offer EVSE to government agencies, FY2021 open market sales totaled just USD \$36,900, while FY2022 open market sales totaled USD \$1.48 Million. These sales figures naturally exclude EVSE that may have been supplied for testing, verification, classified programs, or as part of other larger infrastructure contracts. Three (3) factors have negatively influenced sales to date including: 1- *GSA IT and security reviews* which until complete prohibited offering or ordering through the BPAs or GSA MAS until the vetting process is complete; 2- *program funding* for widescale planning, acquisition, and deployment (now partially solved by the Infrastructure Act); 3- the *impact of COVID-19* effects on system manufacturing and supply chain operations.

Furthermore, at this juncture, thorough data collection and analysis must be considered rudimentary and incomplete. Complicating accurate government market data collection is the relative newness of EVSE products and systems. This immature nature of both the products as well as the market is reflected in the absence of any qualified products with National Stock Numbers (NSN), Product and Service Codes (PSC) and the categorization of the EVSE products into a single North American Industry Classification System (NAICS) code used to identify the suppliers for EVSE. NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. NSNs on the other hand are awarded after rigorous testing and universal specification compliance and become standardized material items of supply as they have been recognized by all NATO countries including United States Department of Defense (DOD). Historically speaking, items assigned NSNs often experience an extended product life-cycle sometimes outwards of a few decades, tech refreshes considered.

Government Market Outlook

Krydon Group's evaluation of the EVSE segment of the Federal/GSA marketplace identifies it as in a nascent stage especially when compared to the commercial market. Its state may best be likened to a funnel with the current state being at the widest portion of the funnel from both an offering and a product/category/NAICS standpoint. We look to FY2025 and beyond before we see a narrowing of the funnel as facilities and departments embark on a sustained and predictable acquisition journey. In the near term, the early adopting agencies may, by default, begin the process of standardizing on a single or limited number of EVSE lines.

Considering the present state of the EVSE market within the Federal Government sector, it is apparent that firms aspiring to work in that sector are advised to enter the market sooner rather than later. With respect to additional entrants as well as additional products and systems, it would be safe to surmise that not all the currently identified EVSE product manufacturers will endure. Inevitably normal industry consolidation, financial resources as well as other market forces will likely result in fewer manufacturers represented in the BPA. History has shown on other technical offerings that the GSA will respond to such consolidation in the offering base by re-competing the BPA contract with an objective of enticing new entries with advanced technologies. Firms holding GSA MAS contracts with other EVSE product lines represented will be the likely entrants during the first BPA revision due in 2026.

There are a number key factors to consider before entering the Federal marketplace for this product type including:

- Unit pricing for most components of EVSE is already framed by the offerings outlined in the BPA agreements
- Sales into the Federal marketplace are often marked by a long sell-in timeframe and require equal measures of patience as well as persistence to achieve meaningful sales volume
- An understanding that government buyers tend to rely upon suppliers with competitive pricing, a predictable fulfillment program and a commitment to regular communication.
- In most cases, acquisition actions for EVSE will include a design, fulfillment and installation offering as the Federal government commonly does not engage in drop-ship orders with evolving technologies.

Summary and Recommendations

Based on widely acknowledged research data and the rate at which the EV market is expected to grow, the Government market for EVSE will likely be a \$200 million market in less than 10 years with continued growth thereafter. Significant opportunities for EVSE acquisition and deployment within federal agencies are already appearing on their project planning schedules and slated for proposal requisition as early as mid-2023. According to various Small Business Advocates within the Government space, contracting preferences will be shown to companies holding specific socio-economic designations such as S/DBE, 8(a), WOSB and HUBZone. As it has been explained earlier in this paper, the EVSE market within the federal sector is at a nascent stage and as such it is advantageous to gain entrance now. Speed to market can be advantageous and, when achieved by teaming with a partner firm holding the noted socio-economic designations, additional leverage is gained. Such arrangements with offerings and pricing competitive with the data contained in the attached spreadsheet can be compelling.

Lastly but more important than market data, barriers to entries nor technical obstacles lies the business challenge that singularly poses the question.

Are you in the federal marketplace for a brief spell or is your organization committed to developing a win strategy with an expert partner?

Market Data Sources Utilized:

1. Electric Vehicle Charging Infrastructure Market Report: [Grandview Research](#)
2. Electric Vehicle Charging Station Market Size: [Globe News Wire Services](#)
3. EV Charging Station through GSA: US General Services Administration

About Us

The Krydon Group Inc. (Krydon) founded in 1990 is a well-established minority owned, SBA 8(a) and HUBZone certified systems integrator that provides procurement, project management, design support, installation, testing, and maintenance solutions for mission-critical infrastructure components. Krydon supports federal agencies and prime contractors with energy solutions domestically and internationally while maintaining several government wide acquisition contracts ensuring streamlined response to evolving procurement requirements.

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