Accelerating Resilient Infrastructure

An industry-led initiative to strengthen community resilience & minimize the impact of rising utility rates

15 January 2026

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Fast-track clean energy and resilience projects
amid shifting incentives and rising risks

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#1 Where It Matters

$40B global company with 177K employees

21k+ US workforce with 135+ years in America

#1 ranked DERMS platform

#1 provider of EV installation services & charge management software

#1 ranked microgrid integrator

#1 provider of performance contracting & automated energy management solutions

#1 market position globally in electrical distribution, grid and industrial data

13 consecutive years as one of the world's most ethical companies by Ethisphere

Global leader in **electrification, automation and digitization**

Ranked #1

2 Years in a Row

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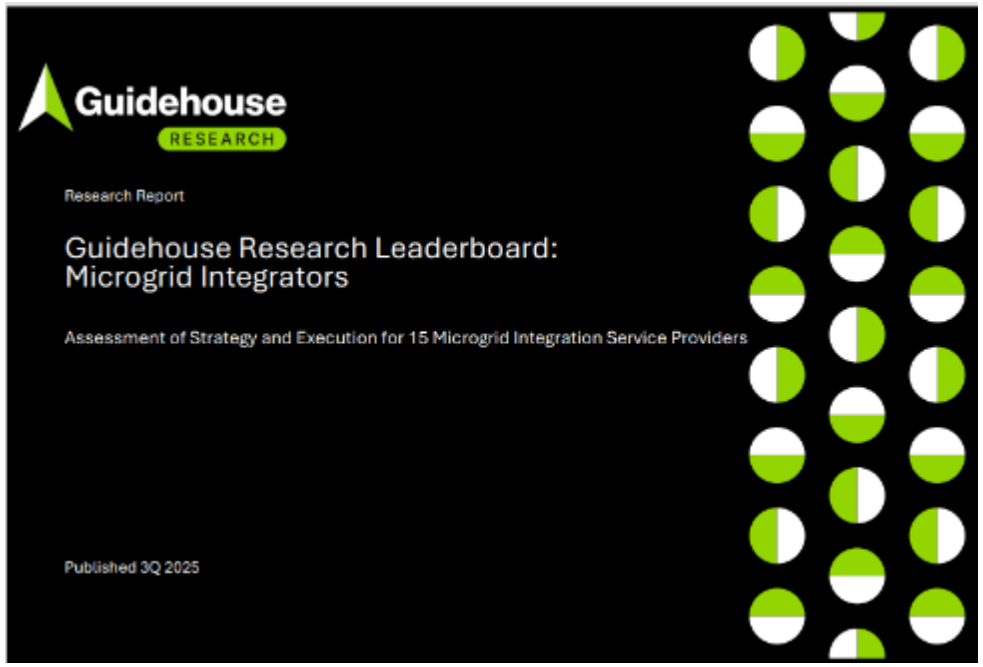
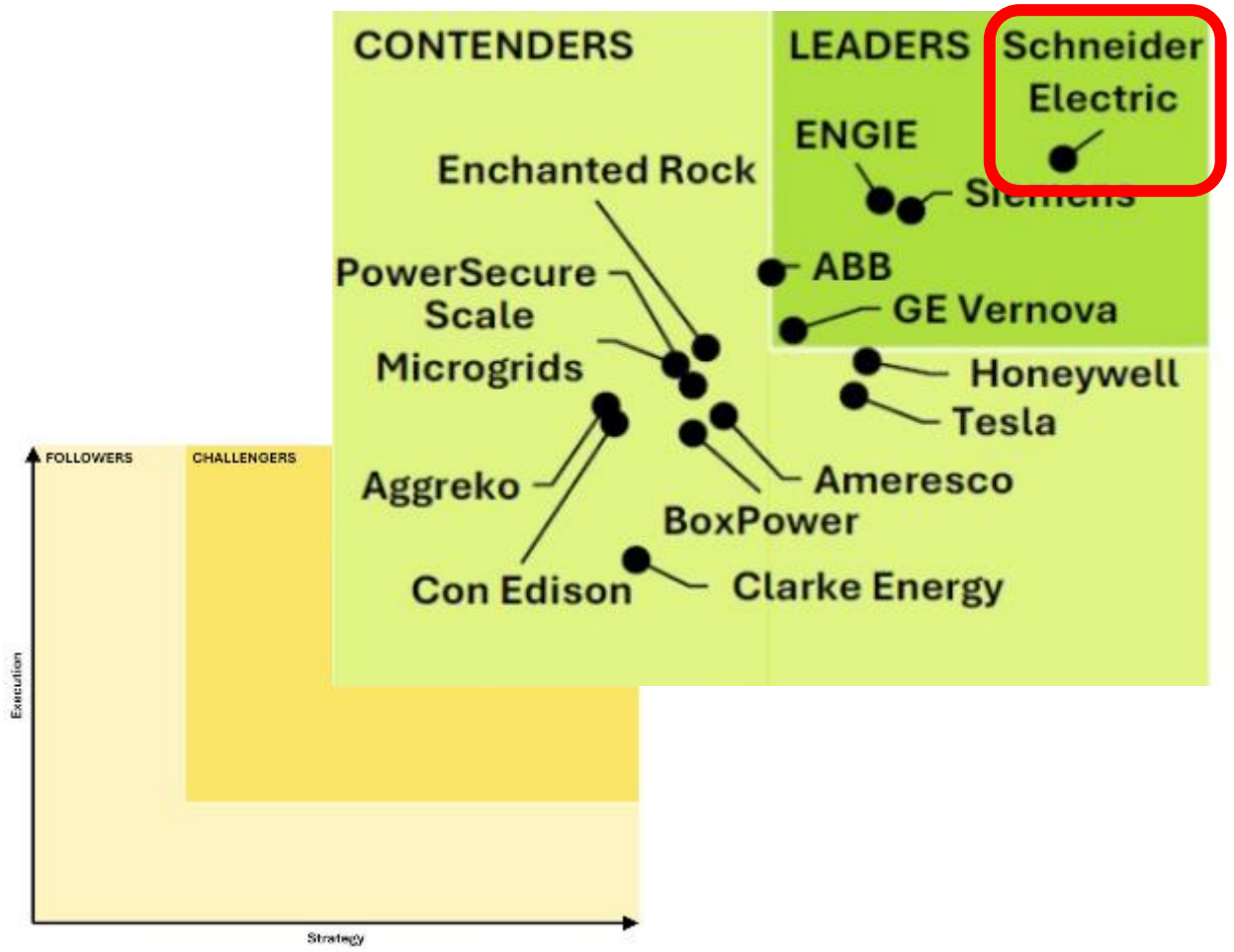
#1 Microgrid Integrator

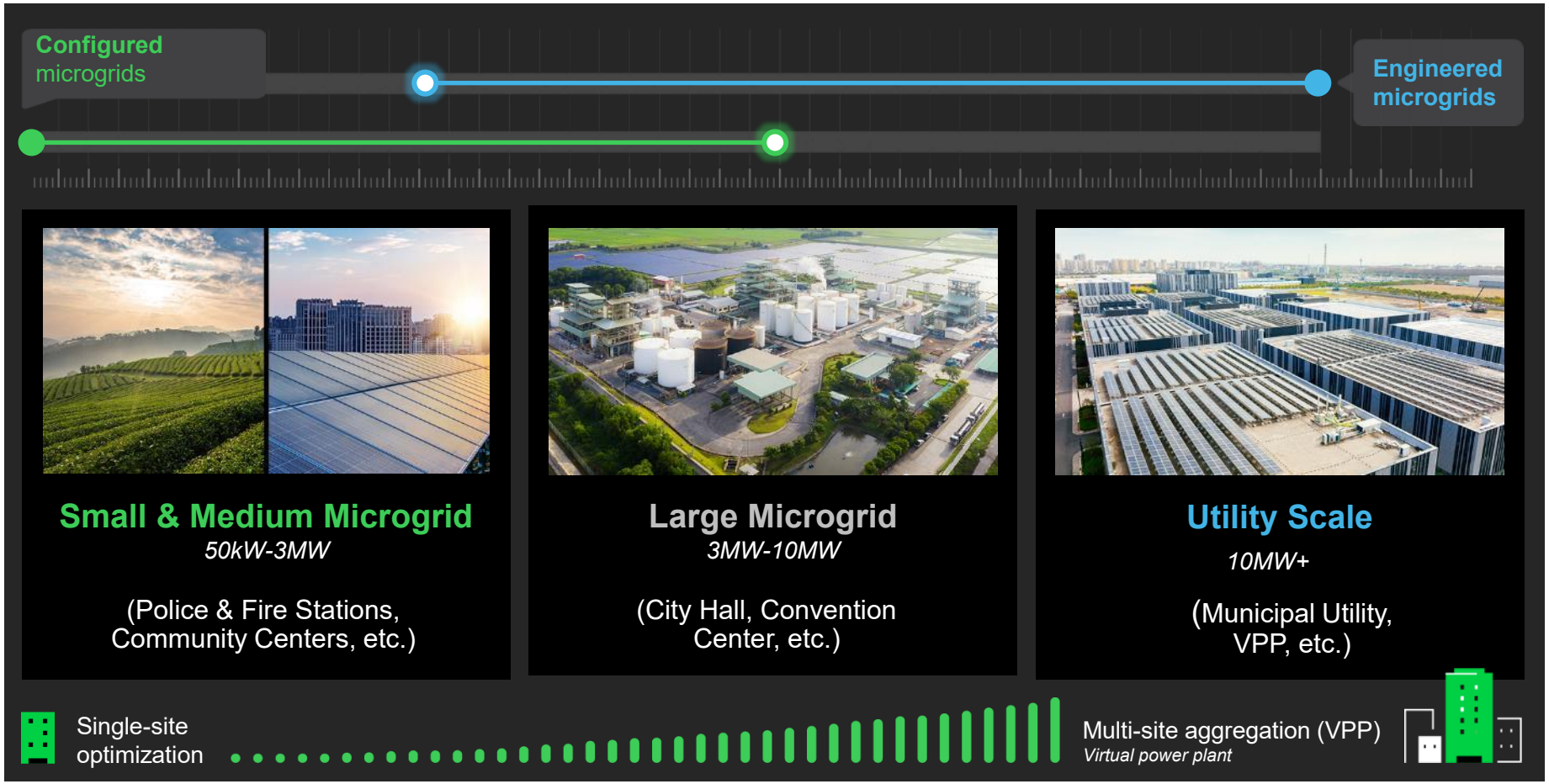


Schneider Electric Ranks No.1 in 2025 Guidehouse Research Leaderboard for Microgrid Integrators and Named a Leader in Distributed Energy Storage Integration

Guidehouse Microgrid Integrator 2025 Leaderboard



Scalable Microgrid Platform



Core SE Offer

- Master Service Agreement (MSA) w/Microgrid Developers to streamline & scale contracting
- Microgrid Flex ‘packages’ support up to 4,000 amps
- Qmerit permitting & installation services
- Safe Harbor SE equipment to preserve 30% tax credit for project developers

Optional SE Offers

- EV charging infrastructure
- Energy Savings Performance Contract / EE
- DER monetization / VPP
- Power quality & metering
- Unified Operations Center / enterprise integration

My Role – Deliver Impactful Outcomes

Facility Modernization | **Data Center Modernization** | **Energy Affordability** | **Reduced Risk & Complexity**

The Energy Technology Partner

Single Point of Accountability

Low & Medium Voltage Systems

SQUARE D by Schneider Electric

Data Center Infrastructure

APC by Schneider Electric

Building Efficiency & Automation

EcoStruxure Innovation At Every Level

Microgrid & Distributed Energy Solutions

uplight

Public & Private Fleet EV Infrastructure

Qmerit evconnect

Third Party Project Funding

Accelerating Resilient Infrastructure Initiative

Representative Schneider Electric Solution Portfolio

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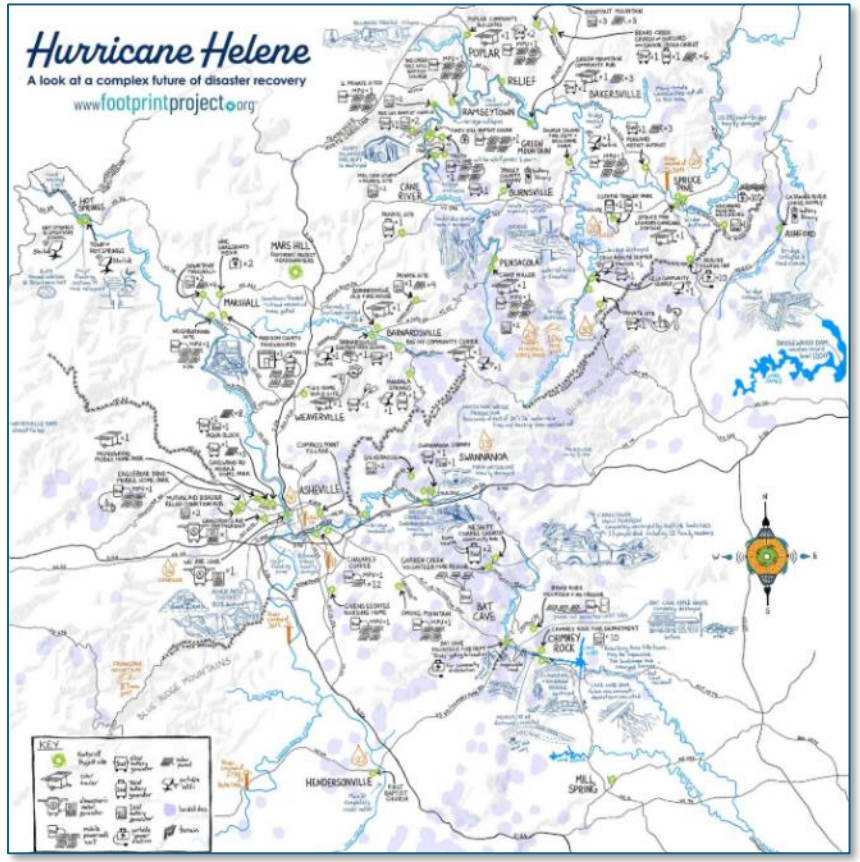
Accelerating Resilient Infrastructure Initiative Summary

- Industry-led ecosystem to help customers deploy clean energy infrastructure to address energy affordability and strengthen community resilience
- Ecosystem pairs $7.5B+ in third-party capital, proven project developers, and innovative enabling technology partners
- Requires no upfront capital via Energy-as-a-Service (EaaS) business model
- ARI industry ecosystem uniquely qualified to deliver at speed & scale
- Schneider Electric reduces financial risk, complexity & time to power for development partners

Customer Benefits

- **Overcome Budget Constraints**
  - Low/no upfront capital key to scale
- **Reduce Risk**
  - Exposure to energy price volatility
  - Impacts from extreme weather-related
  - Operation and Maintenance staffing gaps
- **Reduce Complexity**
  - Single point of vendor accountability
  - Less staff time and expertise required
  - Turnkey Energy-as-a-Service business model
- **Generate Revenue**
  - Virtual Power Plant (VPP) & other grid services



Schneider Electric Named to TIME's List of Best Inventions of 2022 for its Collaboration with Footprint Project to Deliver Microgrids for Disaster Relief

ARI Ecosystem Members – 8 January 2026

Project Developers (16)

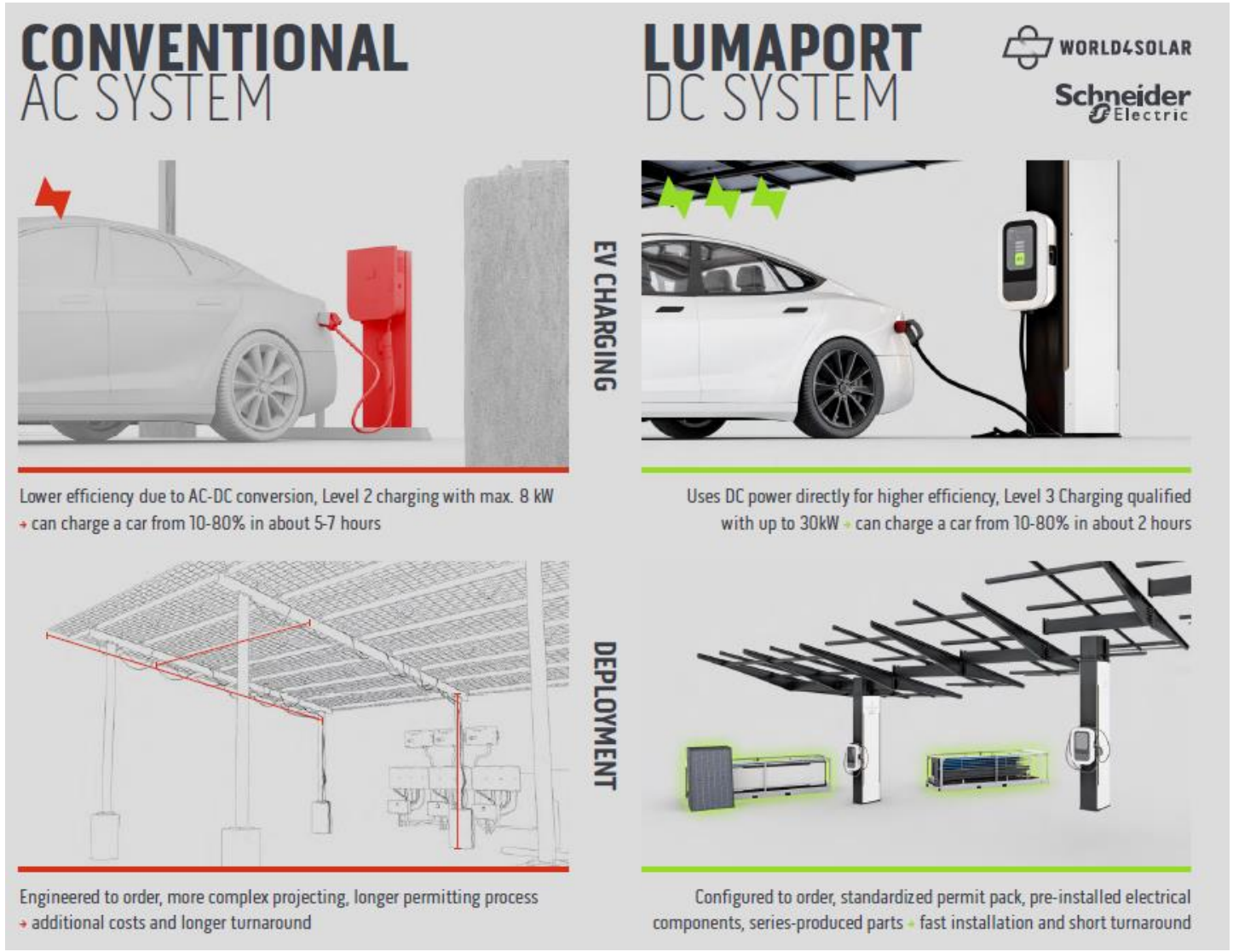
Enabling Partners (17)

What Would A Customer Be Signing Up For?

The Ask.

- **Initially, Discussions with Schneider Electric & Project Developers**
  - Assess resilience needs & fit with existing priorities, model costs & benefits
  - Customer-Developer discussions inform viability of EaaS model
  - Move to procurement if customer & developers see value
  - Schneider Electric serves as convener for customers & technology provider for Developers
- **Ultimately, Execution of Energy-as-a-Service Agreement(s)**
  - 10– to 20-yr contract that would replace existing utility costs (like a PPA but more flexible)
  - Customer enjoys operational resilience, energy cost certainty, and quicker time to power
  - Developer would finance, design, build, own, operate, and maintain in-scope assets
  - Customer would pay monthly energy services fees from Operating budget

DC-Powered EV Charging I/F Saves Time, Money & Space



- **2 Month Install From Contract**
  - Could also capture 30% tax credit (30C) if installed in qualified census tracts by 30 June 2026
  - Defers or eliminates interconnection dependency
  - Greatly reduces civil & electrical costs
  - 30kW ‘fast enough’ fast charging for many use cases
- **Modular Architecture**
  - PV array 7.5’ to 150’ in length
  - L2 and/or DCFC
  - Column-integrated storage minimizes footprint

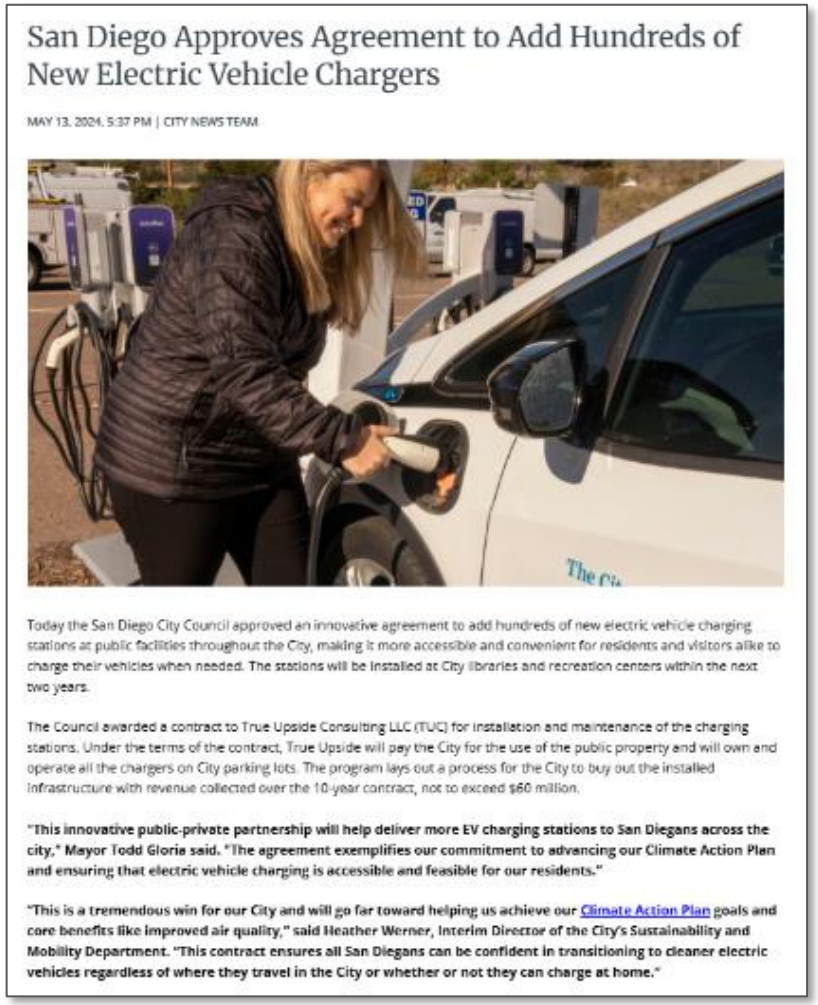
P3 Examples – City of San Diego

Public EV I/F P3

- Delivered with **no upfront capital via EaaS** business model
- EVerged selected P3 partner
- Revenue share to City annually
- Prioritized deployment including Communities of Concern

Muni Microgrids P3

- Delivered with **no upfront capital via EaaS** business model
- Shell New Energy & Gridscape selected P3 partners
- $6M investment for 8 small MGs
- $6M savings over 25-yrs



San Diego Approves Agreement to Add Hundreds of New Electric Vehicle Chargers

MAY 13, 2024, 5:37 PM | CITY NEWS TEAM

Today the San Diego City Council approved an innovative agreement to add hundreds of new electric vehicle charging stations at public facilities throughout the City, making it more accessible and convenient for residents and visitors alike to charge their vehicles when needed. The stations will be installed at City libraries and recreation centers within the next two years.

The Council awarded a contract to True Upside Consulting LLC (TUC) for installation and maintenance of the charging stations. Under the terms of the contract, True Upside will pay the City for the use of the public property and will own and operate all the chargers on City parking lots. The program lays out a process for the City to buy out the installed infrastructure with revenue collected over the 10-year contract, not to exceed $60 million.

"This innovative public-private partnership will help deliver more EV charging stations to San Diegans across the city," Mayor Todd Gloria said. "The agreement exemplifies our commitment to advancing our Climate Action Plan and ensuring that electric vehicle charging is accessible and feasible for our residents."

"This is a tremendous win for our City and will go far toward helping us achieve our Climate Action Plan goals and core benefits like improved air quality," said Heather Werner, Interim Director of the City's Sustainability and Mobility Department. "This contract ensures all San Diegans can be confident in transitioning to cleaner electric vehicles regardless of where they travel in the City or whether or not they can charge at home."

E+E Leader

FOR A SUSTAINABLE TOMORROW

BUSINESS ENERGY ENVIRONMENT INDUSTRIES INFRASTRUCTURE RESEARCH

San Diego's 8 New Microgrids Will Save City $6 Million over 25 Years

Posted Monday, June 27, 2022 10:53 am

EmilyHolbrook

(Credit: Industria Power)

The City of San Diego will soon be operating eight microgrids, saving an estimated $6 million over 25 years in avoided energy costs. Construction is moving out of engineering into mobilization and is set to conclude in December 2022.

Industria Power is the general contractor for this multifaceted microgrid project. As the project developer, Gridscape Solutions was awarded a California Energy Commission (CEC) Advanced Emergency Microgrid grant. Shell New Energies US will be the asset owner and operator for 25 years.

Brookville Smart Energy Bus Depot

Montgomery County, MD (MoCo)

Challenge

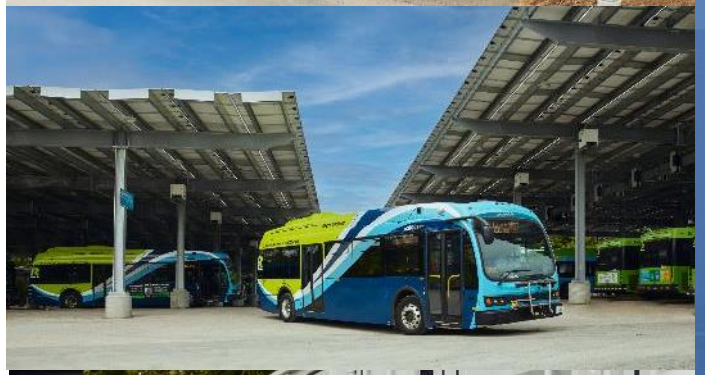
- Transition **70 buses** from diesel to electric
- On-site renewables to advance net-zero 2035 goal
- Maximize on-site renewable energy
- Ensure uninterrupted transit service under any condition

Solution

- **6.5 MW multi-asset microgrid** with DCFCs
- Solar canopies & battery energy storage
- Delivered with **no upfront capital via EaaS**
- Long-term partner to design, build, own, refresh & operate on-site infrastructure

Lessons Learned

- Procure partner, not a design; detailed analysis of operational requirements & options critical
- Change mgt to balance cost vs. operational impact



Results

70 electric buses will eliminate:

78K+ tons

CO_2 over 12 years driving 10K miles / day

160K+ tons

GHG emission reduction over 25 years

100% Operating Capacity
in the event of power outages

Operational flexibility
full control over dispatch & routing

Long-term energy cost predictability

Avoids utility tariffs & demand charges

AlphaStruxure

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Financing Options & Considerations

P3 approaches reduce project risk and preserve customer capital

Characteristic	Design-Bid-Build	ESPC (P3)	EaaS / CaaS* (P3)
Focus	Control	Energy Savings	Service Delivery
Source of funding	Customer	Debt Financing	Third Party Capital
Equipment ownership	Customer	Customer	Project Developer
Off-balance sheet financing	No	No	Yes
Who bears performance risk	Customer	Project Developer	Project Developer
Flexibility to modify scope	Change order	Sometimes	Yes
Scalability	Low	Medium	High
Term of contract	1-5 years	10-20 years	5-20 years
End-of-Term Asset Options	Rip-and-replace	Customer owns & maintains	Renew, replace / upgrade, or customer buyout
Revenue Generating	Maybe	Possible	Maybe (e.g., net metering, EV charging fees, V2G revenue)

EaaS: Flexible Model with Guaranteed Performance

EaaS agreements provide greater flexibility in define KPIs & manage risk

Performance Metric	Contract-Backed Commitments
Power resilience, reliability & availability	Guaranteed system availability of 95 – 99.9% (transfers operational risk) No momentary or sustained interruption during grid outages
System Completion	Guaranteed commercial operation date (transfers performance risk)
Energy Performance	Electrical output, thermal output, steam (temperature, pressure, volume), hot / chilled water (temperature and volume), refrigeration & HVAC
Sustainability	Guaranteed CO2e emissions reductions with flexibility to expedite
Revenue Generation	Potential for shared revenue from grid-response assets in utility programs (e.g. Demand Response, VPP, grid services)
Asset Upgrades and Modernization	Asset optimization & upgrades for lifetime of contract Best-in-class products to ensure solution is adaptable to future upgrades

Thank You

For More information