

Fleet forward: powering the transition to electric mobility

eVision 2026 | Keynote

Written by



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Shape the future
with confidence

Voice of the industry

84%

of CEOs reconfigured strategic investment plans due to geopolitics over the last 12 months.

57%

of CEOs accelerated investment vs. 17% delayed, reflecting strategic reallocation amid geopolitical uncertainty over the past 12 months.

US\$65b

electric vehicle (EV) capital write-downs signal intensified discipline across major OEMs.

Confidence under pressure

Rising geopolitical risk is redirecting capital allocation amid weaker demand signals.

Voice of the consumer

14%

drop in battery EV preference.

36%

are delaying or reconsidering EV plans due to shifting government policies.

39%

state high costs as key adoption hurdles.

Why fleet? Why now?

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EU's December CO₂ Crackdown Puts Corporate Fleets in the Firing Line as New Targets Loom

- Sustainability Business, 26 November 2025

“

Zero Emission Buses Reach 60% of EU City Bus Market in 2025

- Sustainable Bus, February 2026

“

UK ZEV Mandate: 33% of new cars and 24% of new vans must be zero emission in 2026

- Right Fuel Card, 26 January 2026

“

France Escalates Penalties: €5,000 Fine per Missing EV in Fleet Quotas

- Go Electra, December 2025

“

30 Dutch Cities Activate Zero Emission Zones for Freight

- Fleet News, October 2025

“

New Research: 43% of UK Fleet Managers Forecast Lower TCO with Electric Vans

- EO Charging Report, 8 February 2026

“

Netherlands Implements 100% Zero Emission Mandate for Public Transport

- Sustainable Bus, February 2026

“

Brussels 'LEZ' Expansion Forces 2026 Fleet Purge of Euro 6 Diesel Vans

- Fleet Europe, December 2025

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Mandate to Electrify EU Corporate Fleets Could Deliver Significant EV Sales

- Sustainability Online, February 2026

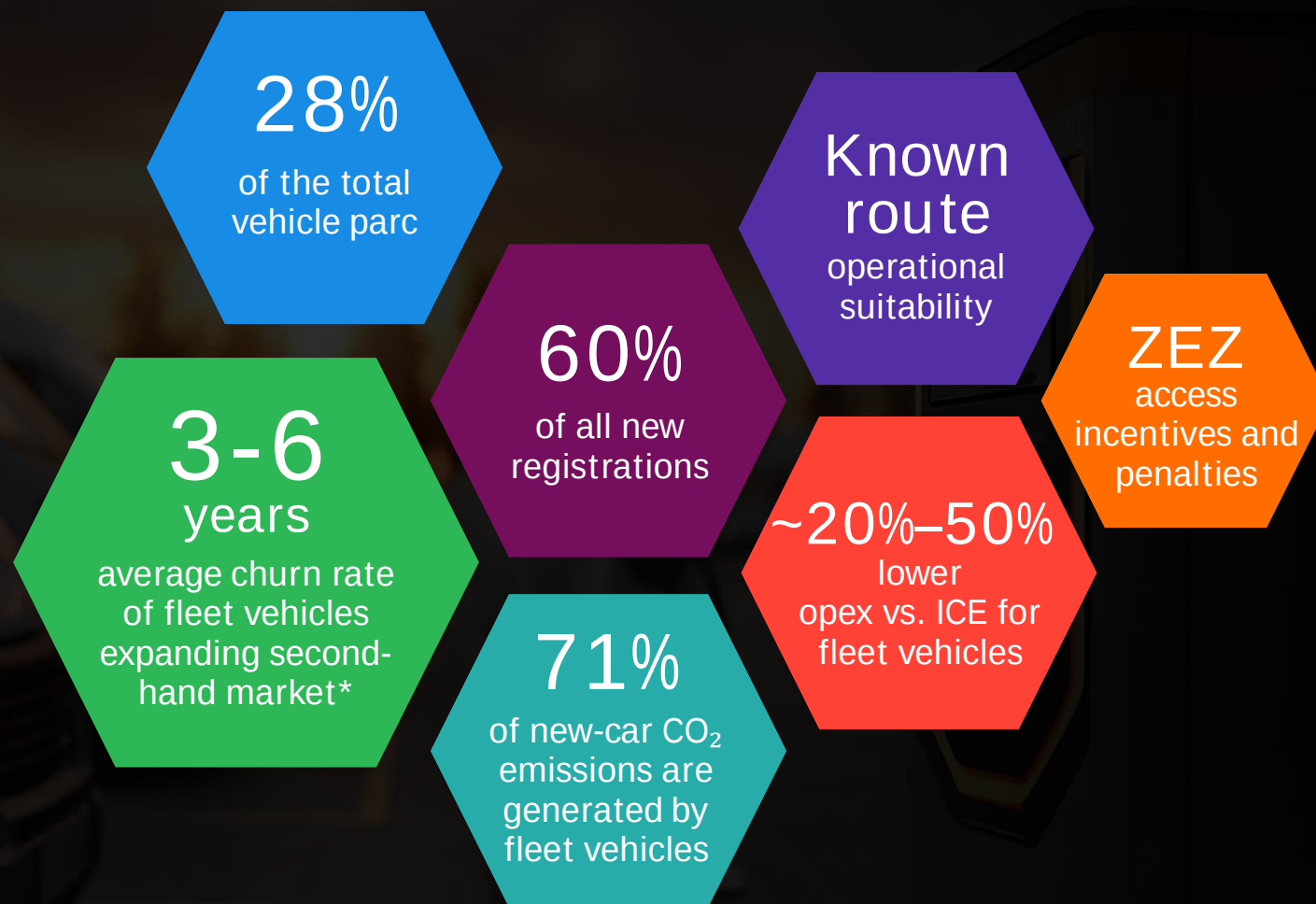
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Company Cars Face Rising Compliance Burden Under Brussels' New CO₂ Roadmap — Private Drivers Spared

- European Commission, 1 April 2025

Why fleet? Why now?

Fleets represent the fastest and most scalable lever to accelerate EV adoption.



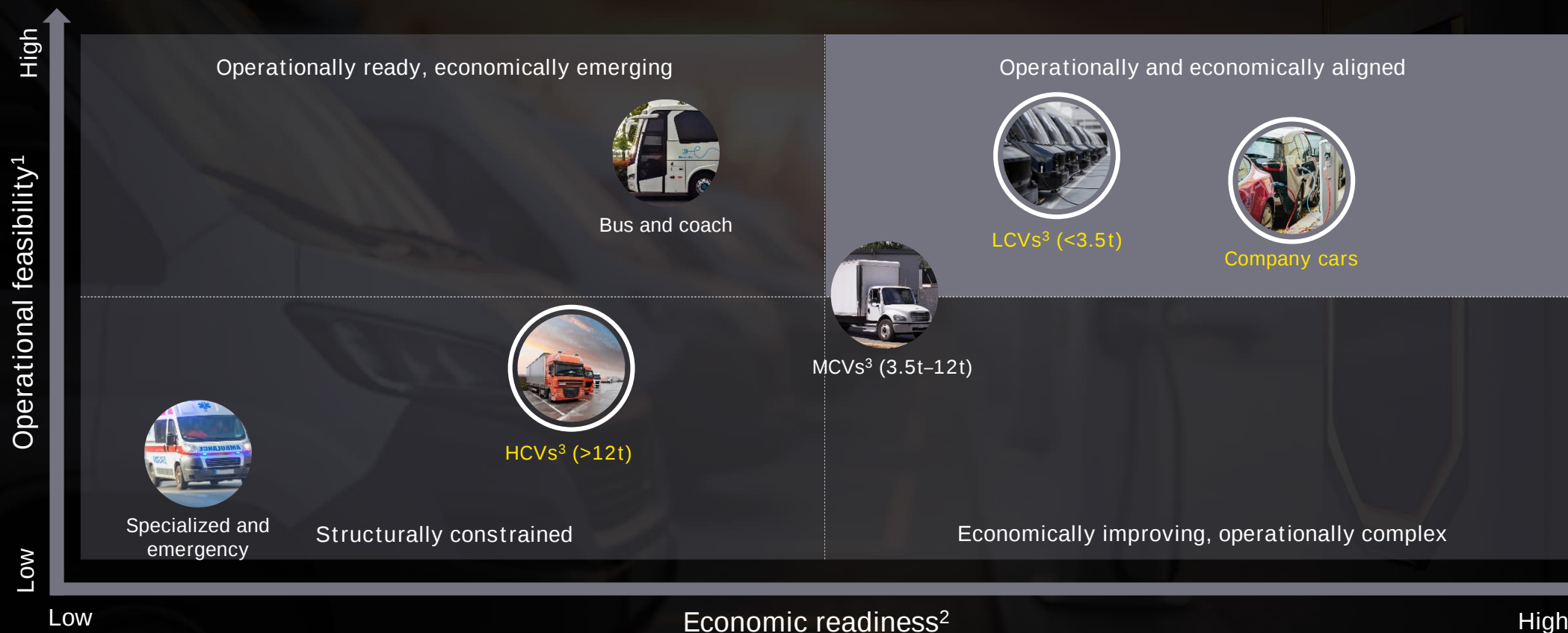
*Based on interviews with fleet managers; assessment across different fleet segments.

ZEZ – zero emission zones.

Source: EY Insights, EY Eurelectric Fleet forward: powering the transition to electric mobility.

One transition. Multiple realities

Each archetype is governed by distinct operational conditions, economic drivers and capital sensitivities.



¹Operational feasibility – ability to electrify without service disruption while maintaining day-to-day cost competitiveness, driven by route predictability, utilization intensity, electricity price and charging mix, fuel displacement, maintenance savings, toll differentiation, grid reliability and duty cycle constraints.

²Economic readiness (total cost of ownership (TCO)/capital discipline) – lifecycle capital competitiveness versus ICE, determined by vehicle price delta (capex), residual value stability, infrastructure capex, policy durability and cost of capital.

³Heavy-duty commercial vehicles (HCVs), medium-duty commercial vehicles (MCVs), light commercial vehicles (LCVs).

Source: EY Eurelectric Fleet forward: powering the transition to electric mobility.

Four systemic obstacles – all structural, not technological

Policy and regulatory fragmentation

Uneven incentives, unclear fleet mandates and inconsistent ZEZ or toll frameworks create capital hesitation.



Binding LOM¹ fleet quotas and strong company-car tax incentives, nationwide ZFE

Capital and TCO uncertainty

Vehicle price delta, residual value volatility and financing sensitivity delay procurement.



Tax reform, clear 2026–30 deductibility schedule, stable fiscal framework



Infrastructure and grid constraints

Depot connection delays and corridor charging gaps create operational scaling risk.



Advanced smart depot charging, micro-grid and co-located battery-storage, and clear urban ZEZ signals

Operational and market maturity gaps

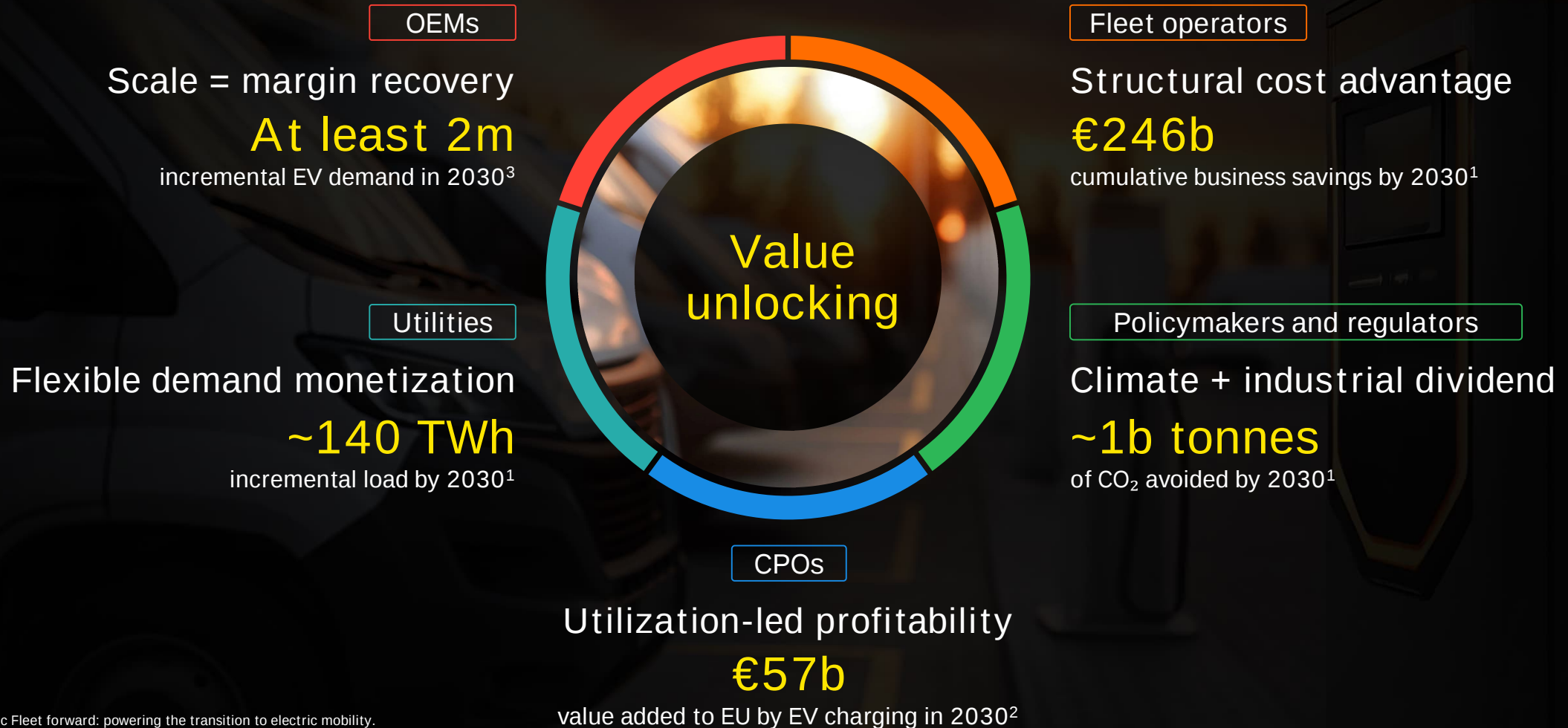
Interoperability, billing complexity and underdeveloped second-hand EV market slow confidence.



Stable long-term policy, mature used EV market, highly interoperable charging networks

¹Loi d'Orientation des Mobilités (LOM) – France's mobility law mandating low-emission fleet quotas and accelerating EV infrastructure and urban zones à faibles émissions (ZFEs), ZEZ – zero emission zones.
Source: EY Insights, EY Eurelectric Fleet forward: powering the transition to electric mobility.

Get this right – and we will unlock value



¹EY Eurelectric Fleet forward: powering the transition to electric mobility.

²EAFO and ChargeUp Europe State of the Industry 2025 Report.

³Corporate fleets and the EU Automotive Industrial Action Plan, T&E Report.

Source: EY Insights.

Six system levers to unlock fleet electrification value



Thank you very much – let's get in touch

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