

High-level ESPON STISE Event

27 April 2022

Two preliminary comments:

1. Harmonisation LEZ/ZEZ is essential

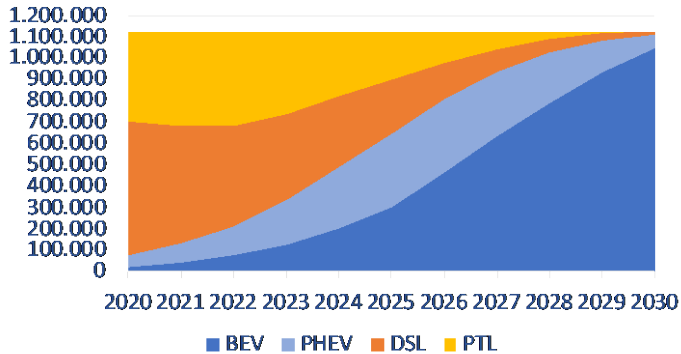
- Too many different LEZ in Europe
- Undermining citizens' trust
- Internal market

2. Focus shift from new market to existing fleet

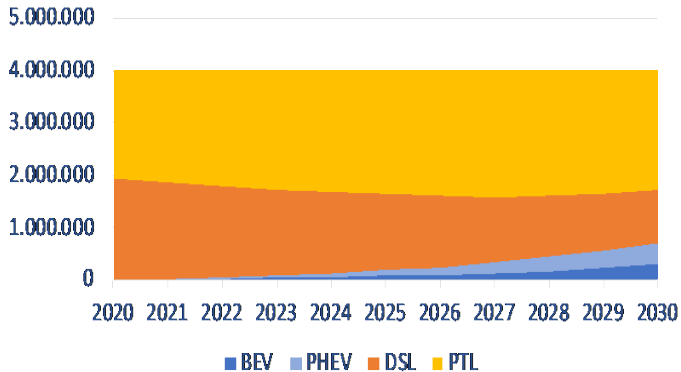
- EU emission objectives: new vehicle market must decarbonise rapidly
- Existing fleet: address decarbonisation + air quality
- Private cars are main concern / most affected

ZEZ? Yes but: (1) BE car fleet forecasts (private/company)

Fleet company car fuel mix



Fleet private car fuel mix



- Almost all company cars in Belgium will be zero emission in 2030 and 2035, but the vast majority of cars will not (all of them private cars).
- Purchasing price of BEV expected to remain significantly higher than ICE in the coming years. TCO only applicable to professionals and company cars.
- BEVs remain unaffordable for most private customers in the coming years.
- Lower-income most affected.

= ZEZ may be highly divisive, discriminatory and anti-social at 2035 horizon?

**only cars <16 years are counted*
 Source: FEBIAC Knowledge Centre
 FEBIAC ASBL/VZW

Shall we compare?

| Policy objective | <u>Amsterdam</u> ZEZ by 2030 | <u>Brussels</u> ZEZ by 2035 |
|--------------------------------|--|---------------------------------------|
| Charging infrastructure | | |
| <i>Today (public)</i> | +5000 | 500? |
| <i>Regular charging</i> | 82.000 by 2030 (22 kW) | 22.000 by 2035 (7,4 kW-11 kW) |
| <i>Fast charging</i> | 800 by 2030 | 0 |
| eTrucks | 2800 by 2030 | 0 |

Credible objectives require credible policies.

“Build them and they will follow”

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