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Public consultation on greening corporate fleets

Fields marked with * are mandatory.

A
Introduction

Road transport is a vital enabler of mobility of passengers and goods in the EU, providing the backbone of economic growth. However, it also contributes to around a quarter of EU's total emissions of CO_2. The Sustainable and Smart Mobility Strategy of the European Commission highlights the need of an inevitable shift to zero-emission mobility to meet the decarbonisation targets of the European Green Deal. Following the 2019 and 2023 revisions of the CO_2 emission performance standards for cars and vans, the fleet emission reduction targets for new cars and vans are now set at -15% CO_2 emissions for the year 2025, -55% for cars and -50% for vans for 2030 and -100% for cars and vans for the year 2035, compared to 2021 – meaning that by 2035 all sales of new cars and vans will be zero-emission vehicles. The CO_2 emission performance standards for lorries currently require emission reductions of 15% for 2025 and 30% for 2030 compared to 2019; a revision setting more ambitious targets, including for other heavy-duty vehicles, is currently being negotiated with the European Parliament and the Council.
The CO_2 emission performance standards for cars and vans and for heavy-duty vehicles act on the supply side, while the new Alternative Fuels Infrastructure Regulation ensures a sufficient minimum of publicly accessible recharging and refuelling infrastructure in the EU. Furthermore, the revised Renewable Energy Directive provides increased renewable energy targets for transport sector to be achieved by 2030. As noted in the RePowerEU plan, action on the demand side can impact the pace of uptake of new vehicles from the respective contributions from business to business (B2B) and business-to-customers (B2C) markets.
This open public consultation addresses corporate fleets of cars, vans, lorries, and coaches. Buses (excluding coaches) are not in the scope of this open public consultation. This is because a clear majority of the market of buses (excluding coaches) falls under public procurement and is already subject to the mandatory targets under the Clean Vehicles Directive. For the purpose of this consultation, it is important to consider the specifics of the different types of corporate fleets that differ in terms of their market structures.
Car corporate fleets
The corporate car fleets market includes car leasing, rental cars, company cars, cars registered by vehicle manufacturers themselves (e.g. 0 km registration), urban mobility service fleets and other corporate fleets.
Car leasing is a consolidated market, dominated by a relatively small number of large fleet operators and their clients that manage the large majority of the market and are responsible for around 3 million new vehicle registrations per year (approximately 30% of new car sales). Customers of such leasing companies are large companies as well as SMEs and some private lease contracters.
Rental car fleets' market share is smaller than that of car leasing. The vehicles typically have comparatively high yearly mileage, and short-rental cars are usually among the fastest to reach the second-hand market.

The share of company cars – vehicles that are provided by an employer to an employee as a benefit in kind – in the total fleet varies significantly between Member States due to differences in their fiscal treatment and general employment rules and conditions. These cars typically have a slightly higher yearly mileage than the average, especially when the employer also provides coverage of the fuel costs as a benefit in kind.

The market share of cars registered by vehicle manufacturers themselves also varies significantly across different Member States, depending inter alia on the presence and relative size of vehicle manufacturers.

Urban mobility service fleets (taxis, ride-hailing, car sharing – excluding scheduled public transport) have a strong link with local and urban mobility, and typically operate on the basis of licences setting conditions for their operation.

Other corporate fleets can include e.g. service cars owned by a company and used to reach clients to provide services, or for the mobility of staff between different offices.

Van corporate fleets

The size of the market for van rental and leasing fleets – vans offered for lease or rental to companies or private individuals – is estimated to represent approximately one quarter that of car lease and rental, in terms of number of vehicles involved.

A significant part of large fleets of logistics vans used to distribute goods – such as last-mile and urban delivery fleets operated by postal services, e-commerce, large retailers, etc. – are operated by relatively large companies.

Other corporate van fleets can include e.g. service vans owned by a company and used to reach clients to provide goods and services.

Lorries corporate fleets

When it comes to lorries used for transportation of goods, corporate sales represent almost the totality of the market, as private purchases are rarely noted. There are large fleets of 10 or more lorries, but a substantive amount of forwarding is done by smaller independent lorry operators (usually SMEs), that often are sub-contracted.

Coaches corporate fleets

When it comes to coaches, corporate sales represent almost the totality of the market, as private purchases are rarely noted. Two categories should be distinguished: large fleets of 10 or more coaches, and smaller independent coach operators (usually SMEs).

B About you

* B.1 Language of my contribution

- Bulgarian
- Croatian
- Czech
- Danish
- Dutch
- English (selected)
- Estonian
- Finnish
- French

- German
- Greek
- Hungarian
- Irish
- Italian
- Latvian
- Lithuanian
- Maltese
- Polish
- Portuguese
- Romanian
- Slovak
- Slovenian
- Spanish
- Swedish

*B.2 I am giving my contribution as

- Academic/research institution
- Business association (selected)
- Company/business
- Consumer organisation
- EU citizen
- Environmental organisation
- Non-EU citizen
- Non-governmental organisation (NGO)
- Public authority
- Trade union
- Other

*B.3 In which capacity will you reply to the following questions?

- Car leasing fleet operator
- Car rental fleet operator
- Urban mobility service fleet operator (taxi, ride-hailing, car sharing)
- Vans leasing or rental fleet operator
- Large logistics fleet operator (selected)

- ○ Other corporate fleet operator
- ○ Vehicle and equipment manufacturer/supplier
- ○ Corporate fleet user
- ○ EU/national/regional/local public authority
- ○ Public transport operator
- ○ Interest organisation representing societal interests, particularly on environmental and social topics, consumers
- ○ Other

B.4 In which vehicle sector are you operating?

- [x] Vans
- [x] Lorries
- [ ] Coaches

*B.7 First name

Quentin

*B.8 Surname

Donnadille

*B.9 Email (this won't be published)

donnadille@clecat.org

*B.13 Organisation name

255 character(s) maximum

CLECAT - European association for forwarding, transport, logistic and Customs services

*B.14 Organisation size

- ● Micro (1 to 9 employees)
- ○ Small (10 to 49 employees)
- ○ Medium (50 to 249 employees)
- ○ Large (250 or more)

B.15 Transparency register number

Check if your organisation is on the transparency register. It's a voluntary database for organisations seeking to influence EU decision-making.

684985491-01

* B.16 Country of origin

Please add your country of origin, or that of your organisation.

This list does not represent the official position of the European institutions with regard to the legal status or policy of the entities mentioned. It is a harmonisation of often divergent lists and practices.

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh
- Barbados
- Belarus
- Djibouti
- Dominica
- Dominican Republic
- Ecuador
- Egypt
- El Salvador
- Equatorial Guinea
- Eritrea
- Estonia
- Eswatini
- Ethiopia
- Falkland Islands
- Faroe Islands
- Fiji
- Finland
- France
- French Guiana
- French Polynesia
- French Southern and Antarctic Lands
- Gabon
- Georgia
- Libya
- Liechtenstein
- Lithuania
- Luxembourg
- Macau
- Madagascar
- Malawi
- Malaysia
- Maldives
- Mali
- Malta
- Marshall Islands
- Martinique
- Mauritania
- Mauritius
- Mayotte
- Mexico
- Micronesia
- Moldova
- Monaco
- Mongolia
- Saint Martin
- Saint Pierre and Miquelon
- Saint Vincent and the Grenadines
- Samoa
- San Marino
- São Tomé and Príncipe
- Saudi Arabia
- Senegal
- Serbia
- Seychelles
- Sierra Leone
- Singapore
- Sint Maarten
- Slovakia
- Slovenia
- Solomon Islands
- Somalia
- South Africa
- South Georgia and the South Sandwich Islands
- South Korea
- South Sudan

- Belgium
- Belize
- Benin
- Bermuda
- Bhutan
- Bolivia
- Bonaire Saint Eustatius and Saba
- Bosnia and Herzegovina
- Botswana
- Bouvet Island
- Brazil
- British Indian Ocean Territory
- British Virgin Islands
- Brunei
- Bulgaria
- Burkina Faso
- Burundi
- Cambodia
- Cameroon
- Canada
- Cape Verde
- Cayman Islands
- Central African Republic
- Chad
- Germany
- Ghana
- Gibraltar
- Greece
- Greenland
- Grenada
- Guadeloupe
- Guam
- Guatemala
- Guernsey
- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- Heard Island and McDonald Islands
- Honduras
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iran
- Iraq
- Ireland
- Montenegro
- Montserrat
- Morocco
- Mozambique
- Myanmar/Burma
- Namibia
- Nauru
- Nepal
- Netherlands
- New Caledonia
- New Zealand
- Nicaragua
- Niger
- Nigeria
- Niue
- Norfolk Island
- Northern Mariana Islands
- North Korea
- North Macedonia
- Norway
- Oman
- Pakistan
- Palau
- Palestine
- Spain
- Sri Lanka
- Sudan
- Suriname
- Svalbard and Jan Mayen
- Sweden
- Switzerland
- Syria
- Taiwan
- Tajikistan
- Tanzania
- Thailand
- The Gambia
- Timor-Leste
- Togo
- Tokelau
- Tonga
- Trinidad and Tobago
- Tunisia
- Türkiye
- Turkmenistan
- Turks and Caicos Islands
- Tuvalu
- Uganda

- Chile
- China
- Christmas Island
- Clipperton
- Cocos (Keeling) Islands
- Colombia
- Comoros
- Congo
- Cook Islands
- Costa Rica
- Côte d’Ivoire
- Croatia
- Cuba
- Curaçao
- Cyprus
- Czechia
- Democratic Republic of the Congo
- Denmark
- Isle of Man
- Israel
- Italy
- Jamaica
- Japan
- Jersey
- Jordan
- Kazakhstan
- Kenya
- Kiribati
- Kosovo
- Kuwait
- Kyrgyzstan
- Laos
- Latvia
- Lebanon
- Lesotho
- Liberia
- Panama
- Papua New Guinea
- Paraguay
- Peru
- Philippines
- Pitcairn Islands
- Poland
- Portugal
- Puerto Rico
- Qatar
- Réunion
- Romania
- Russia
- Rwanda
- Saint Barthélemy
- Saint Helena Ascension and Tristan da Cunha
- Saint Kitts and Nevis
- Saint Lucia
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- United States Minor Outlying Islands
- Uruguay
- US Virgin Islands
- Uzbekistan
- Vanuatu
- Vatican City
- Venezuela
- Vietnam
- Wallis and Futuna
- Western Sahara
- Yemen
- Zambia
- Zimbabwe

The Commission will publish all contributions to this public consultation. You can choose whether you would prefer to have your details published or to remain anonymous when your contribution is published. **For the purpose of transparency, the type of respondent (for example, ‘business association, ‘consumer association’, ‘EU citizen’) country of origin, organisation name and size, and its transparency register number, are always published. Your e-mail address will never be published.** Opt in to select the privacy option that best suits you. Privacy options default based on the type of respondent selected

* B.18 **Contribution publication privacy settings**

The Commission will publish the responses to this public consultation. You can choose whether you would like your details to be made public or to remain anonymous.

○ **Anonymous**
Only organisation details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published as received. Your name will not be published. Please do not include any personal data in the contribution itself if you want to remain anonymous.

● **Public**
Organisation details and respondent details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published. Your name will also be published.

☑ I agree with the personal data protection provisions

C General views on vehicles registered by corporate entities

On the EU market, about 42% of new vehicles are registered by private buyers, i.e. customers who purchase a vehicle in their own name. The rest of the vehicles are purchased by various corporate fleet actors (see introduction for a categorisation).
This section aims to assess the general role of corporate fleets in relation to private vehicles in the decarbonisation of EU road transport. The following section will explore specific types of corporate fleets and their respective roles in more detail.

C.1 To what extent do you agree with the following statement: “the switch to zero-emission vehicles should happen faster for vehicles registered by corporate entities than for vehicles registered by private individuals”?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	No opinion
Cars	○	○	○	○	○	●
Vans	●	○	○	○	○	○
Lorries	●	○	○	○	○	○
Coaches	○	○	○	○	○	●

C.2 In your view, the shift to zero-emission vehicles registered by corporate entities is generally easier or harder than for vehicles registered by private users:

	Significantly easier than for private vehicles	Easier than for private vehicles	Of comparable difficulty as for private vehicles	Harder than for private vehicles	Significantly harder than for private vehicles	No opinion
Cars						X
Vans	X					
Lorries	X					
Coaches						X

C.3 In your view, is the share of zero-emission vehicles currently registered by corporate entities sufficient to help ensure the achievement of the European Green Deal targets towards zero-emission transport?

	Fully sufficient	Sufficient	Somewhat sufficient	Not sufficient	No opinion
Cars					X
Vans				X	
Lorries				X	
Coaches					X

C.4 In your view, how relevant would be the following expected benefits of a faster shift to zero-emission vehicles (ZEV) in corporate fleets?

	Very relevant	Relevant	Somewhat Relevant	Not Relevant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone		X			
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones		X			
Faster build-up of second-hand market for ZEVs			X		
Increased market acceptance and public confidence in ZEVs				X	

Faster market uptake of smart and bidirectional charging and e-mobility services					X
Increased demand for renewable electricity for recharging EVs				X	
Other (please specify)					

C.6 In your view, what would be the impact of a faster shift to zero-emission vehicles (ZEV) in corporate fleets?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)		X				
On the price of new ZEVs (negative = increase in price, positive = decrease)						X
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)		X				
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						X
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						X
On the costs and economic performance of other EU market actors making use of those corporate fleets (negative = worse performance, positive = better performance)						X

On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	◉
Other (please specify)	○	○	○	○	○	○

D Views on different types of corporate fleets

Following the categorisation in the introduction to this open public consultation, the following corporate fleets are distinguished:

Cars

- **Leasing car fleets** – cars offered for lease to private individuals or companies.
- **Rental car fleets** – cars offered for short-term rental.
- **Company cars** – vehicles that are provided by an employer to an employee as a benefit in kind.
- **Car registered by vehicle manufacturers themselves**, such as demos, 0-km registration, vehicle manufacturer employee car schemes, etc.
- **Urban mobility service fleets** (taxis, PHVs, ride-hailing, car sharing – excluding scheduled public transport).
- **Other corporate car fleets** – any other fleet of 2 or more vehicles cars owned or operated by the same legal entity (e.g., service cars used to reach clients and provide services or goods) that does not fall within the previous categories.

Vans

- **Van rental and leasing fleets –** vans offered for lease or rental to companies or private individuals for both goods and passengers.
- **Large fleets of logistics vans –** fleets of 10 or more vans used to distribute goods, e.g., last-mile and urban delivery fleets operated by postal services, e-commerce, large retailers.
- **Other corporate van fleets –** any other fleet of 2 or more vans owned or operated by the same legal entity (e.g., service vans used to reach clients and provide services or goods) that does not fall within the previous categories.

Lorries

- **Large fleets of logistics lorries** – fleets of 10 or more lorries used for transporting goods, e.g. regional distribution and long-haul, including cross border logistics.
- **Other corporate lorries fleets –** any other fleet of 2 or more lorries owned or operated by the same legal entity. This is a broad category including any fleet of 2 or more lorries owned or operated by the same legal entity that does not fall within the previous category.

Coaches

- **Large fleets of coaches –** fleets of 10 or more coaches used for transporting passengers.

- **Other corporate coaches fleets** – any other fleet of 2 or more coaches owned or operated by the same legal entity. This is a broad category including any fleet of 2 or more coaches owned or operated by the same legal entity that does not fall within the previous category.

This section aims to assess the respective roles, potential contributions and relevant barriers to zero-emission vehicle take up in these different corporate fleet types.

Depending on their use case, operational requirements and business case, corporate fleets can face different obstacles and incentives, so that it might be comparatively easier or harder to switch to zero-emission vehicles. At the same time, there can be differences in the comparative importance of accelerating the shift to zero-emission vehicles in these different types of corporate fleets. Please provide your ranking of decarbonisation of different fleets in terms of **importance** and **difficulty** of the shift to ZEVs in different fleets:

D.1 Importance

Use drag&drop or the up/down buttons to change the order or accept the initial order.

- Car registered by vehicle manufacturers against themselves
- Leasing car fleets
- Rental car fleets
- Company cars
- Urban mobility service fleets
- Other corporate car fleets
- Van rental and leasing fleets
- Large logistics van fleets
- Other corporate van fleets
- Large logistics lorries fleets
- Other corporate lorries fleets
- Large corporate coaches fleets
- Other corporate coaches fleets

D.2 Difficulty

Use drag&drop or the up/down buttons to change the order or accept the initial order.

- Car registered by vehicle manufacturers against themselves
- Leasing car fleets
- Rental car fleets

- Company cars
- Urban mobility service fleets
- Other corporate car fleets
- Van rental and leasing fleets
- Large logistics van fleets
- Other corporate van fleets
- Large logistics lorries fleets
- Other corporate lorries fleets
- Large corporate coaches fleets
- Other corporate coaches fleets

D.3 In your view, how important are the following factors in determining the **willing ness** of vehicle manufacturers to include zero-emission vehicles among **cars they register against themselves**?

(*) "Total cost of ownership" means the total cost of acquiring and owning a vehicle for its lifetime, including the costs of acquiring or leasing the vehicle, fuel costs, maintenance and repair costs, insurance costs, finance costs, and taxes

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	●
Operational cost of the vehicle	○	○	○	○	●
Total cost of ownership* of the vehicle	○	○	○	○	●
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	●
Availability of ZEV models	○	○	○	○	●
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	●
Vehicle registration tax	○	○	○	○	●
Yearly vehicle taxation	○	○	○	○	●

Fiscal treatment of the vehicle	○	○	○	○	●
Availability of public recharging /refuelling infrastructure	○	○	○	○	●
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	●
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	●
Availability of renewable electricity for recharging of vehicles	○	○	○	○	●
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	●
Clients' preferences	○	○	○	○	●
Other (please specify)	○	○	○	○	○

D.5 In your view, how important are the following factors in determining the **willingness** of the fleet operators to include zero-emission vehicles in **leasing car fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	●
Operational cost of the vehicle	○	○	○	○	●
Total cost of ownership of the vehicle	○	○	○	○	●
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	●
Availability of ZEV models	○	○	○	○	●
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	●
Vehicle registration tax	○	○	○	○	●
Yearly vehicle taxation	○	○	○	○	●
Fiscal treatment of the vehicle	○	○	○	○	●
Availability of public recharging /refuelling infrastructure	○	○	○	○	●

Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	◉
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	◉
Availability of renewable electricity for recharging of vehicles	○	○	○	○	◉
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	◉
Clients’ preferences	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.7 In your view, how important are the following factors in determining the **willingness** of the fleet operators to include zero-emission vehicles in **rental car fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	◉
Operational cost of the vehicle	○	○	○	○	◉
Total cost of ownership of the vehicle	○	○	○	○	◉
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	◉
Availability of ZEV models	○	○	○	○	◉
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	◉
Vehicle registration tax	○	○	○	○	◉
Yearly vehicle taxation	○	○	○	○	◉
Fiscal treatment of the vehicle	○	○	○	○	◉
Availability of public recharging /refuelling infrastructure	○	○	○	○	◉
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	◉
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	◉

Availability of renewable electricity for recharging of vehicles					X
Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)					X
Clients’ preferences					X
Other (please specify)					

D.9 In your view, how important are the following factors in determining the **willingness** of employers to include zero-emission vehicles among **company cars**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle					X
Operational cost of the vehicle					X
Total cost of ownership of the vehicle					X
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)					X
Availability of ZEV models					X
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)					X
Vehicle registration tax					X
Yearly vehicle taxation					X
Fiscal treatment of the vehicle					X
Availability of public recharging /refuelling infrastructure					X
Availability of own (private) recharging /refuelling infrastructure					X
Operational requirements (daily mileage, hours of operation, etc.)					X
Availability of renewable electricity for recharging of vehicles					X

Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	●
Clients’ preferences	○	○	○	○	●
Other (please specify)	○	○	○	○	○

D.11 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **urban mobility service fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	●
Operational cost of the vehicle	○	○	○	○	●
Total cost of ownership of the vehicle	○	○	○	○	●
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	●
Availability of ZEV models	○	○	○	○	●
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	●
Vehicle registration tax	○	○	○	○	●
Yearly vehicle taxation	○	○	○	○	●
Fiscal treatment of the vehicle	○	○	○	○	●
Availability of public recharging /refuelling infrastructure	○	○	○	○	●
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	●
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	●
Availability of renewable electricity for recharging of vehicles	○	○	○	○	●
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	●

Clients' preferences					X
Other (please specify)					

D.13 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **other corporate car fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle					X
Operational cost of the vehicle					X
Total cost of ownership of the vehicle					X
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)					X
Availability of ZEV models					X
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)					X
Vehicle registration tax					X
Yearly vehicle taxation					X
Fiscal treatment of the vehicle					X
Availability of public recharging /refuelling infrastructure					X
Availability of own (private) recharging /refuelling infrastructure					X
Operational requirements (daily mileage, hours of operation, etc.)					X
Availability of renewable electricity for recharging of vehicles					X
Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)					X
Clients' preferences					X
Other (please specify)					

D.15 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **van rental and leasing fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	◉
Operational cost of the vehicle	○	○	○	○	◉
Total cost of ownership of the vehicle	○	○	○	○	◉
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	◉
Availability of ZEV models	○	○	○	○	◉
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	◉
Vehicle registration tax	○	○	○	○	◉
Yearly vehicle taxation	○	○	○	○	◉
Fiscal treatment of the vehicle	○	○	○	○	◉
Availability of public recharging /refuelling infrastructure	○	○	○	○	◉
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	◉
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	◉
Availability of renewable electricity for recharging of vehicles	○	○	○	○	◉
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	◉
Clients' preferences	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.17 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **large logistics van fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	X				
Operational cost of the vehicle	X				
Total cost of ownership of the vehicle	X				
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	X				
Availability of ZEV models	X				
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)		X			
Vehicle registration tax		X			
Yearly vehicle taxation		X			
Fiscal treatment of the vehicle		X			
Availability of public recharging /refuelling infrastructure	X				
Availability of own (private) recharging /refuelling infrastructure	X				
Operational requirements (daily mileage, hours of operation, etc.)		X			
Availability of renewable electricity for recharging of vehicles			X		
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)			X		
Clients' preferences		X			
Other (please specify)					

D.19 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **other corporate van fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	X				

Operational cost of the vehicle	●	○	○	○	○
Total cost of ownership of the vehicle	●	○	○	○	○
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	●	○	○	○	○
Availability of ZEV models	●	○	○	○	○
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	●	○	○	○
Vehicle registration tax	○	●	○	○	○
Yearly vehicle taxation	○	●	○	○	○
Fiscal treatment of the vehicle	○	●	○	○	○
Availability of public recharging /refuelling infrastructure	●	○	○	○	○
Availability of own (private) recharging /refuelling infrastructure	●	○	○	○	○
Operational requirements (daily mileage, hours of operation, etc.)	○	●	○	○	○
Availability of renewable electricity for recharging of vehicles	○	○	●	○	○
Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	●	○	○
Clients’ preferences	○	●	○	○	○
Other (please specify)	○	○	○	○	○

D.21 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **large fleets of logistics lorries**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	●	○	○	○
Operational cost of the vehicle	●	○	○	○	○
Total cost of ownership of the vehicle	●	○	○	○	○

Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	X				
Availability of ZEV models	X				
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)		X			
Vehicle registration tax		X			
Yearly vehicle taxation		X			
Fiscal treatment of the vehicle		X			
Availability of public recharging /refuelling infrastructure	X				
Availability of own (private) recharging /refuelling infrastructure	X				
Operational requirements (daily mileage, hours of operation, etc.)		X			
Availability of renewable electricity for recharging of vehicles			X		
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)			X		
Clients' preferences		X			
Other (please specify)					

D.23 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **other corporate lorries fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	X				
Operational cost of the vehicle	X				
Total cost of ownership of the vehicle	X				
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	X				

Availability of ZEV models	X				
Compliance with legal requirements (CO_2 emission performance standards, corporate sustainability requirements)		X			
Vehicle registration tax		X			
Yearly vehicle taxation		X			
Fiscal treatment of the vehicle		X			
Availability of public recharging /refuelling infrastructure	X				
Availability of own (private) recharging /refuelling infrastructure	X				
Operational requirements (daily mileage, hours of operation, etc.)	X				
Availability of renewable electricity for recharging of vehicles				X	
Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)			X		
Clients' preferences		X			
Other (please specify)					

D.25 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **large fleets of coaches**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle					X
Operational cost of the vehicle					X
Total cost of ownership of the vehicle					X
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)					X
Availability of ZEV models					X

Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	◉
Vehicle registration tax	○	○	○	○	◉
Yearly vehicle taxation	○	○	○	○	◉
Fiscal treatment of the vehicle	○	○	○	○	◉
Availability of public recharging /refuelling infrastructure	○	○	○	○	◉
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	◉
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	◉
Availability of renewable electricity for recharging of vehicles	○	○	○	○	◉
Regional/local regulations (e.g. urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	◉
Clients' preferences	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.27 In your view, how important are the following factors in determining the **willing ness** of the fleet operators to include zero-emission vehicles in **other corporate coaches fleets**?

	Very important	Important	Somewhat Important	Not important	No opinion
Purchase cost of the vehicle	○	○	○	○	◉
Operational cost of the vehicle	○	○	○	○	◉
Total cost of ownership of the vehicle	○	○	○	○	◉
Technical characteristics and performance of the vehicle (range, max speed, acceleration, weight and dimensions, etc.)	○	○	○	○	◉
Availability of ZEV models	○	○	○	○	◉
Compliance with legal requirements (CO2 emission performance standards, corporate sustainability requirements)	○	○	○	○	◉

Vehicle registration tax	○	○	○	○	●
Yearly vehicle taxation	○	○	○	○	●
Fiscal treatment of the vehicle	○	○	○	○	●
Availability of public recharging /refuelling infrastructure	○	○	○	○	●
Availability of own (private) recharging /refuelling infrastructure	○	○	○	○	●
Operational requirements (daily mileage, hours of operation, etc.)	○	○	○	○	●
Availability of renewable electricity for recharging of vehicles	○	○	○	○	●
Regional/local regulations (e.g., urban vehicle access regulations, specific requirements in the licencing /concession procedures)	○	○	○	○	●
Clients' preferences	○	○	○	○	●
Other (please specify)	○	○	○	○	○

D.29 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **cars registered by vehicle manufacturers against themselves**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	●
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	●
Faster build-up of second-hand market for ZEVs	○	○	○	○	●
Increased market acceptance and public confidence in ZEVs	○	○	○	○	●

Other (please specify)	○	○	○	○	○

D.31 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **leasing car fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	◉
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	◉
Faster build-up of second-hand market for ZEVs	○	○	○	○	◉
Increased market acceptance and public confidence in ZEVs	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.33 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **rental car fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	◉
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due	○	○	○	○	◉

to the relatively higher mileage of corporate vehicles compared to private ones					
Faster build-up of second-hand market for ZEVs	○	○	○	○	◉
Increased market acceptance and public confidence in ZEVs	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.35 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **company cars**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	◉
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	◉
Faster build-up of second-hand market for ZEVs	○	○	○	○	◉
Increased market acceptance and public confidence in ZEVs	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.37 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **urban mobility services fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2	○	○	○	○	◉

emission performance standards alone					
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	◉
Faster build-up of second-hand market for ZEVs	○	○	○	○	◉
Increased market acceptance and public confidence in ZEVs	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.39 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **other corporate car fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	◉
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	◉
Faster build-up of second-hand market for ZEVs	○	○	○	○	◉
Increased market acceptance and public confidence in ZEVs	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

D.41 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **van leasing and rental fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	●
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	●
Faster build-up of second-hand market for ZEVs	○	○	○	○	●
Increased market acceptance and public confidence in ZEVs	○	○	○	○	●
Other (please specify)	○	○	○	○	○

D.43 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **large logistics van fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	●	○	○	○
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	●	○	○	○
Faster build-up of second-hand market for ZEVs	○	○	●	○	○
Increased market acceptance and public confidence in ZEVs	○	○	○	●	○

Other (please specify)					

D.45 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **other corporate van fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone			X		
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones			X		
Faster build-up of second-hand market for ZEVs				X	
Increased market acceptance and public confidence in ZEVs				X	
Other (please specify)					

D.47 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **large logistics lorries fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone			X		
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due				X	

to the relatively higher mileage of corporate vehicles compared to private ones					
Faster build-up of second-hand market for ZEVs	○	○	◉	○	○
Increased market acceptance and public confidence in ZEVs	○	○	○	◉	○
Other (please specify)	○	○	○	○	○

D.49 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **other corporate lorries fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	◉	○	○
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	◉	○
Faster build-up of second-hand market for ZEVs	○	○	◉	○	○
Increased market acceptance and public confidence in ZEVs	○	○	○	◉	○
Other (please specify)	○	○	○	○	○

D.51 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **large coaches fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2	○	○	○	○	◉

emission performance standards alone					
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	●
Faster build-up of second-hand market for ZEVs	○	○	○	○	●
Increased market acceptance and public confidence in ZEVs	○	○	○	○	●
Other (please specify)	○	○	○	○	○

D.53 In your view, how significant would be **impacts** of a faster shift to zero-emission vehicles (ZEV) in **other coaches fleets**, in terms of the following potential benefits?

	Highly significant	Significant	Somewhat Significant	Not Significant	No opinion
Increase in the share of ZEVs in the total number of vehicles registered in the EU, compared to what would result from the CO_2 emission performance standards alone	○	○	○	○	●
Higher GHG and pollutant emission savings from the same share of ZEVs in the total number of vehicles registered in the EU, due to the relatively higher mileage of corporate vehicles compared to private ones	○	○	○	○	●
Faster build-up of second-hand market for ZEVs	○	○	○	○	○
Increased market acceptance and public confidence in ZEVs	○	○	○	○	●
Other (please specify)	○	○	○	○	○

E Views on possible initiatives to accelerate the deployment of zero-emission vehicles

A broad range of different actions can be taken at local, regional, national, and European level to accelerate the shift to zero-emission vehicles in specific types of corporate fleets, taking into account their characteristics, operational requirements, and business model. These measures range from voluntary measures such as pledges and commitments, to incentives – both financial and operational (e.g. priority access to specific services, fiscal incentive) – and mandatory measures such as requirements for minimum shares of zero-emission vehicles in new purchases or in the fleet.
In this section, you will be invited to provide your views on the relevance and appropriateness of various possible measures, and on their likely impacts on emissions, ZEV affordability, competitiveness of different market actors, and other aspects.

E.1 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **cars registered by vehicle manufacturers against themselves** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉
Operational incentives (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	◉
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	◉
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	◉
Mandatory share of ZEV in new purchases	○	○	○	○	◉
Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.3 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **leasing car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉

Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)					X
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks					X
Right to have necessary recharging /refuelling infrastructure installed at relevant locations					X
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate					X
Mandatory share of ZEV in new purchases					X
Mandatory share of ZEV in the fleet					X
Other (please specify)					

E.5 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **rental car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle					X
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)					X
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks					X
Right to have necessary recharging /refuelling infrastructure installed at relevant locations					X
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate					X
Mandatory share of ZEV in new purchases					X

Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.7 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **company cars** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	◉
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	◉
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	◉
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	◉
Mandatory share of ZEV in new purchases	○	○	○	○	◉
Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.9 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **urban mobility services fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	◉

Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	●
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	●
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	●
Mandatory share of ZEV in new purchases	○	○	○	○	●
Mandatory share of ZEV in the fleet	○	○	○	○	●
Other (please specify)	○	○	○	○	○

E.11 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **other corporate car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	●
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	●
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	●
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	●
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	●
Mandatory share of ZEV in new purchases	○	○	○	○	●
Mandatory share of ZEV in the fleet	○	○	○	○	●
Other (please specify)	○	○	○	○	○

E.13 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **van rental and leasing fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	◉
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	◉
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	◉
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	◉
Mandatory share of ZEV in new purchases	○	○	○	○	◉
Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.15 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **large logistics vans fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	◉	○	○	○	○
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	◉	○	○	○
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	◉	○	○	○

Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	●	○	○	○
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	●	○
Mandatory share of ZEV in new purchases	○	○	○	●	○
Mandatory share of ZEV in the fleet	○	○	○	●	○
Other (please specify)	●	○	○	○	○

E.16 Please specify Other

1000 character(s) maximum

Full exemption or at least discount on road tolls for ZEV, provided that it is not compensated by a significant increase of tolls for other types of vehicles.

E.17 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **other corporate vans fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	●	○	○	○	○
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	●	○	○	○
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	●	○	○	○
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	●	○	○	○
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	●	○
Mandatory share of ZEV in new purchases	○	○	○	●	○
Mandatory share of ZEV in the fleet	○	○	○	●	○
Other (please specify)	●	○	○	○	○

E.18 Please specify Other

1000 character(s) maximum

Full exemption or at least discount on road tolls for ZEV, provided that it is not compensated by a significant increase of tolls for other types of vehicles.

E.19 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **large logistics lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	X				
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)		X			
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks		X			
Right to have necessary recharging /refuelling infrastructure installed at relevant locations		X			
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate				X	
Mandatory share of ZEV in new purchases				X	
Mandatory share of ZEV in the fleet				X	
Other (please specify)	X				

E.20 Please specify Other

1000 character(s) maximum

Full exemption or at least discount on road tolls for ZEV, provided that it is not compensated by a significant increase of tolls for other types of vehicles.

E.21 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **other corporate lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	X				
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)		X			
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks		X			
Right to have necessary recharging /refuelling infrastructure installed at relevant locations		X			
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate				X	
Mandatory share of ZEV in new purchases				X	
Mandatory share of ZEV in the fleet				X	
Other (please specify)	X				

E.22 Please specify Other

1000 character(s) maximum

Full exemption or at least discount on road tolls for ZEV, provided that it is not compensated by a significant increase of tolls for other types of vehicles.

E.23 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **large coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle					X
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)					X

Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	◉
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	◉
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	◉
Mandatory share of ZEV in new purchases	○	○	○	○	◉
Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.25 In your view, how effective would the following measures be to accelerate the deployment of zero-emission vehicles in **other corporate coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very effective	Somewhat effective	Rather not effective	Not effective	No opinion
Fiscal incentives to the purchase of the vehicle	○	○	○	○	◉
Specific benefits (access to low-emission zones or traffic restricted areas, dedicated parking, use of dedicated lanes, etc.)	○	○	○	○	◉
Voluntary schemes / commitments by fleet managers and owner based on agreed benchmarks	○	○	○	○	◉
Right to have necessary recharging /refuelling infrastructure installed at relevant locations	○	○	○	○	◉
Requirement for a minimum ZEV share to access fiscal benefits, or to obtain concession/license to operate	○	○	○	○	◉
Mandatory share of ZEV in new purchases	○	○	○	○	◉
Mandatory share of ZEV in the fleet	○	○	○	○	◉
Other (please specify)	○	○	○	○	○

E.27 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **cars registered by vehicle manufacturers against themselves** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.29 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **leasing car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						X
On the price of new ZEVs (negative = increase in price, positive = decrease)						X
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						X
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						X
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						X
Other (please specify)						

E.31 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **rental car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						
On the price of new ZEVs (negative = increase in price, positive = decrease)						
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						
Other (please specify)						

E.33 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **company cars** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						X
On the price of new ZEVs (negative = increase in price, positive = decrease)						X
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						X
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						X
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						X
Other (please specify)						

E.35 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **urban mobility services fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.37 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **other corporate car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						X
On the price of new ZEVs (negative = increase in price, positive = decrease)						X
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						X
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						X
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						X
Other (please specify)						

E.39 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **van rental and leasing fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.41 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **large logistics fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	●	○	○	○	○
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	●	○	○	○	○
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	●	○	○	○	○
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	●	○	○	○	○
Other (please specify)	○	○	○	○	○	○

E.43 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **other corporate van fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)		X				
On the price of new ZEVs (negative = increase in price, positive = decrease)		X				
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)		X				
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)		X				
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)		X				
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)		X				
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)		X				
Other (please specify)						

E.45 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **large logistics lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)		X				
On the price of new ZEVs (negative = increase in price, positive = decrease)		X				
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)		X				
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)		X				
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)		X				
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)		X				
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)		X				
Other (please specify)						

E.47 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **other corporate lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	●	○	○	○	○
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	●	○	○	○	○
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	●	○	○	○	○
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	●	○	○	○	○
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	●	○	○	○	○
Other (please specify)	○	○	○	○	○	○

E.49 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **large coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.51 In your view, what would be the impacts of **incentives and voluntary measures** (e.g. fiscal incentives, voluntary schemes, pledges) to accelerate the deployment of zero-emission vehicles in **other corporate coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	◉
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	◉
Other (please specify)	○	○	○	○	○	○

E.53 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **cars registered by vehicle manufacturers against themselves** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						X
On the price of new ZEVs (negative = increase in price, positive = decrease)						X
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						X
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						X
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						X
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						X
Other (please specify)						

E.55 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **leasing car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.57 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **rental car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.59 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **company cars** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	◉
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	◉
Other (please specify)	○	○	○	○	○	○

E.61 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **urban mobility services fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	◉
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	◉
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	◉
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	◉
Other (please specify)	○	○	○	○	○	○

E.63 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **other corporate car fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)						
On the price of new ZEVs (negative = increase in price, positive = decrease)						
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)						
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)						
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)						
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)						
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)						
Other (please specify)						

E.65 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **van rental and leasing fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.67 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **large logistics fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	◉	○	○
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	◉	○
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	◉	○	○
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	◉	○	○
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	◉	○
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	◉	○	○
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	◉	○	○	○
Other (please specify)	○	○	○	○	○	○

E.69 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **other corporate van fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)				X		
On the price of new ZEVs (negative = increase in price, positive = decrease)					X	
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)				X		
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)				X		
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)					X	
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)				X		
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)			X			
Other (please specify)						

E.71 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **large logistics lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)				X		
On the price of new ZEVs (negative = increase in price, positive = decrease)					X	
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)				X		
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)				X		
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)					X	
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)				X		
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)			X			
Other (please specify)						

E.73 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **other corporate lorries fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)				X		
On the price of new ZEVs (negative = increase in price, positive = decrease)					X	
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)				X		
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)				X		
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)					X	
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)				X		
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)			X			
Other (please specify)						

E.75 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **large coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.77 In your view, what would be the impacts of **mandatory measures** (e.g. mandatory shares of ZEV) to accelerate the deployment of zero-emission vehicles in **other corporate coaches fleets** (assuming that the level of ambition for each measure is set at a comparable level)?

	Very Positive	Positive	Neither positive nor negative	Negative	Very negative	No opinion
On GHG and pollutant emissions (negative = increased emissions, positive = emission reductions)	○	○	○	○	○	●
On the price of new ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On the price of second-hand ZEVs (negative = increase in price, positive = decrease)	○	○	○	○	○	●
On innovation and global competitiveness of EU vehicle manufacturers (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of corporate fleet owners and operators (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On the competitiveness of other EU market actors making use of those corporate fleets (negative = decreased competitiveness, positive = increased competitiveness)	○	○	○	○	○	●
On regulatory burden and administrative costs (negative = increased burden/costs, positive = decreased burden /costs)	○	○	○	○	○	●
Other (please specify)	○	○	○	○	○	○

E.79 In your view, what is the importance of different factors in identifying corporate fleets to be addressed in possible initiatives to increase the share of zero-emission vehicles?

	Important	Somewhat important	Not important	No opinion
The vehicle category (car, van, lorry, coach)	●	○	○	○
The type of fleet (rental, lease, company car, etc.)	○	●	○	○
The type of entity owning the fleet (SME, large company, etc.)	○	●	○	○
The size of the fleet (e.g. fleets of more than X vehicles)	○	●	○	○
Other (please specify)	○	○	○	○

E.81 How would you rank initiatives to accelerate the switch to zero-emission vehicles in different corporate fleets, in terms of priority ?

	High priority	Medium priority	Low priority	Should not be addressed	No opinion
Car registered by vehicle manufacturers against themselves	○	○	○	○	●
Leasing car fleets	○	○	○	○	●
Rental car fleets	○	○	○	○	●
Company cars	○	○	○	○	●
Urban mobility service fleets	○	○	○	○	●
Other corporate car fleets	○	○	○	○	●
Van rental and leasing fleets	○	○	○	○	●
Large logistics van fleets	○	○	○	○	●
Other corporate van fleets	○	○	○	○	●
Large logistics lorries fleets	○	○	○	○	●
Other corporate lorries fleets	○	○	○	○	●
Large coaches fleets	○	○	○	○	●
Other corporate coaches fleets	○	○	○	○	●

E.82 In your view, what is the most appropriate level to take possible initiatives to accelerate the uptake of zero-emission vehicles?

	Local /Regional	National	EU	Should not be addressed	No opinion
Car registered by vehicle manufacturers against themselves	○	○	○	○	◉
Leasing car fleets	○	○	○	○	◉
Rental car fleets	○	○	○	○	◉
Company cars	○	○	○	○	◉
Urban mobility service fleets	○	○	○	○	◉
Other corporate car fleets	○	○	○	○	◉
Van rental and leasing fleets	○	○	○	○	◉
Large logistics van fleets	○	○	○	○	◉
Other corporate van fleets	○	○	○	○	◉
Large logistics lorries fleets	○	○	○	○	◉
Other corporate lorries fleets	○	○	○	○	◉
Large coaches fleets	○	○	○	○	◉
Other corporate coaches fleets	○	○	○	○	◉

E.83 In your view, what is the minimum size of different types of corporate fleets that should be subject to possible initiatives to accelerate the uptake of zero-emission vehicles?

	2 or more vehicles	10 or more vehicles	100 or more vehicles	1.000 or more vehicles	Should not be addressed	No opinion
Car registered by vehicle manufacturers against themselves	○	○	○	○	○	◉
Leasing car fleets	○	○	○	○	○	◉
Rental car fleets	○	○	○	○	○	◉
Company cars	○	○	○	○	○	◉
Urban mobility service fleets	○	○	○	○	○	◉
Other corporate car fleets	○	○	○	○	○	◉
Van rental and leasing fleets	○	○	○	○	○	◉
Large logistics van fleets	○	○	○	○	○	◉

Other corporate van fleets	○	○	○	○	○	◉
Large logistics lorries fleets	○	○	○	○	○	◉
Other corporate lorries fleets	○	○	○	○	○	◉
Large coaches fleets	○	○	○	○	○	◉
Other corporate coaches fleets	○	○	○	○	○	◉

E.84 If you wish to add further information or comments - within the scope of this questionnaire - please feel free to do so here.

3000 character(s) maximum

E.81: CLECAT cannot compare the different vehicle categories in terms of priority as our area of expertise is focused on vans and lorries only.
E.82: It is impossible to choose an appropriate level of initiative as it should be a combination of both national and EU initiatives, and possibly local/regional in certain cases.
E.83: The road freight sector is a very fragmented and competitive industry. It is rather important to focus on operational capabilities of road freight operators (type of operation, charging capacity…) than on the fleet size to determine possible initiatives to increase the uptake of ZEV in corporate fleets.

E.85 Do you wish to upload also a position paper or additional evidence supporting your responses? Please feel free to do so, taking in account that the maximum file size is 1MB. Please note that the uploaded document is an optional complement and serves as additional background reading to better understand your position. It will be published alongside your response to the questionnaire, which is the essential input to this open public consultation.

Only files of the type pdf,txt,doc,docx,odt,rtf are allowed

2e44f819-82bf-4b8e-af60-8faab2fb0722/CLECAT_position_paper_Greening_Corporate_Fleets_June_2024.pdf

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