

EV Belgium vzw/asbl

The Belgian Association for Zero-Emission Mobility

Monthly Update

12 December 2025



Compliance & Antitrust Statement

All members of EV Belgium always comply with the rules of competition law. For this, the members participating in any meeting always take into account the following elements and information:

- The companies and people participating are committed to free and fair competition.
- · They have therefore planned to exchange information in accordance with the rules of competition law and have appropriate antitrust compliance measures in place.

In view of the above, the participants will jointly ensure that only content specified in the previously shared agenda will be discussed and that sensitive content will not be addressed (see table below). If a member has any antitrust concerns about the course of the discussion, these will be recorded in the minutes and the meeting suspended.

For more information and links:

- VBO: LINK
- Belgian Competition Authority: LINK

| DISC func | BUSS or SHARE the following information if it will benefit the ctioning of the association/meeting: | AVOID/STOP discussions or exchanges of anything that may concretely influence the future market behaviour of the members/companies, including the following information the following information: |
|--------------|---|---|
| ンンンン | General economic indicators General Industrial outlook Regulatory evolution and its impact on the e-mobility sector Data truly publicly available and available at no extra cost | Prices, discounts, margins, credit terms, guarantees, instalments and other conditions applied by businesses Individual company data on costs, production, investments, capacity, stocks, sales, orders and/or profits Individual business strategies on the development, design, production, distribution or marketing of certain products |
| V | Always try to provide aggregated figures or estimates (without sharing individual company information) to public authorities when assessing a financial impact of new regulations | Individual offers regarding contracts of specific products or requests for quotation Information regarding existing or potential competitors, suppliers, distributors or customers that could have the effect of excluding them from the market |
| ~ | Always consult legal counsel when in doubt | Any other information that you or any participating company consider to be sensitive, even if not contained in this overview |





1. Agenda

- 1. Welcome, compliance & agenda
- 2. Belgium Electric Vehicle Summit 2026
- 3. Market Forecasts
- 4. Policy Update
 - Federal Budget Agreement: Impact on EV sector
 - Flemish Flex Framework: Approval in Parliament
 - Flemish Tax: Impact on EV sales
 - ORES Meeting with EVB Members: Flexibility & FIFO
 - Wallonia: Task Force Puissance & Flexibilité
 - **Brussels:** Overview Taxes on Charge Points
- 5. Positions
 - **EPBD:** Finalized postion
 - Outlook 2026: Outlines & expectations
- 6. AoB, next meeting(s) and closure



FEATURED SPEAKERS



BART BECKERS
CHIEF COMMERCIAL OFFICER
DEPUTY CEO
ARVAL BNP PARIBAS GROUP





JEAN-LUC CRUCKE
MINISTER FOR MOBILITY
FEDERAL GOVERNMENT OF
BELGIUM



FRANK VAN GOOL
CEO
FEBIAC



CARINE VAEREMANS
CEO
PROFACTS



ELLEN HIEP

BOARD MEMBER

VERENIGING ELEKTRISCHE RIJDERS
GLOBAL EV ALLIANCE

VIRGINIE CLAES

BRUSSELS EXPO

JANUARY 16, 2026

ELECTRICVEHICLESUMMIT.BE





FEATURED SESSIONS

REAL-WORLD DRIVINGA USER PERSPECTIVE

ADRIANA FRICKE Hubject



ELLEN HIEP

ANTOINE DECHAMPS



BATTERIES & THE SECOND-HAND MARKET

MICHEL PEELMAN Car-Pass



FILIP DOBBELEIR

TOTAL COST OF OWNERSHIP FROM MYTH TO MARKET REALITY

LAETICIA VAN HECKE Worldline



TOM VAN ASSCHE

ENERGY FLEXIBILITY
THE NEXT STEP IN THE TRANSITION

TOMMASO DIFONZO ENGIE Laborelec



MATTHIJS KOK CITY OF UTRECHT



FIRE SAFETY RISK VS REALITY

PHILIPPE BECRET PETER ROSELETH TOM VANDEWEGHE BAPTISTE COBBE









BRUSSELS EXPO

JANUARY 16, 2026

ELECTRICVEHICLESUMMIT.BE





CLARITY IN THE THE FLEET SECTOR ELECTRIC TRANSITION AS A DRIVING FORCE

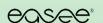
PARTNERS



Interparking



ZEborne



Q8*€lectric*

MEDIA PARTNERS





BRUSSELS EXPO

JANUARY 16, 2026

ELECTRICVEHICLESUMMIT.BE





CLARITY IN THE THE FLEET SECTOR ELECTRIC TRANSITION AS A DRIVING FORCE

REGISTER NOW

BECOME A PARTNER





ELECTRICVEHICLESUMMIT.BE

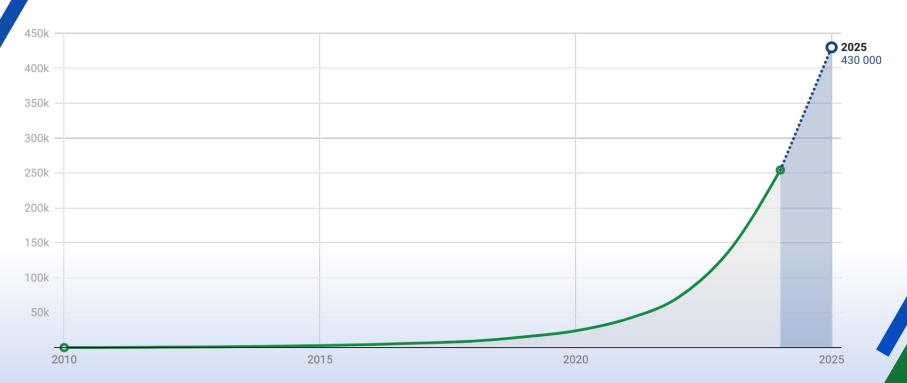






CLARITY IN THE THE FLEET SECTOR ELECTRIC TRANSITION AS A DRIVING FORCE

BEV Parc (est. 11/25)

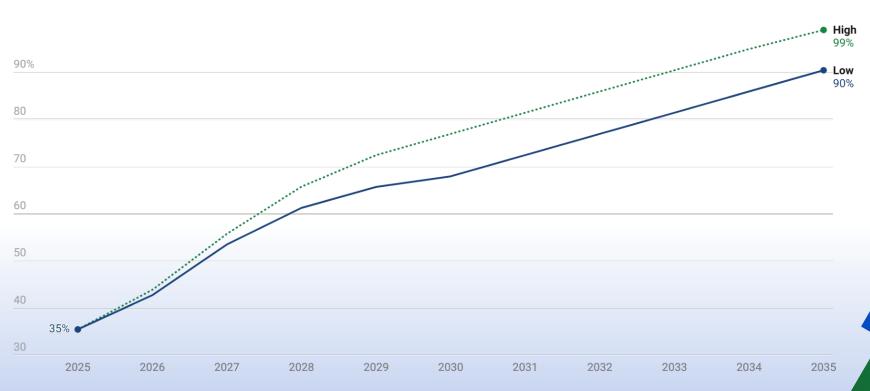


Vehicle Sales (% change)

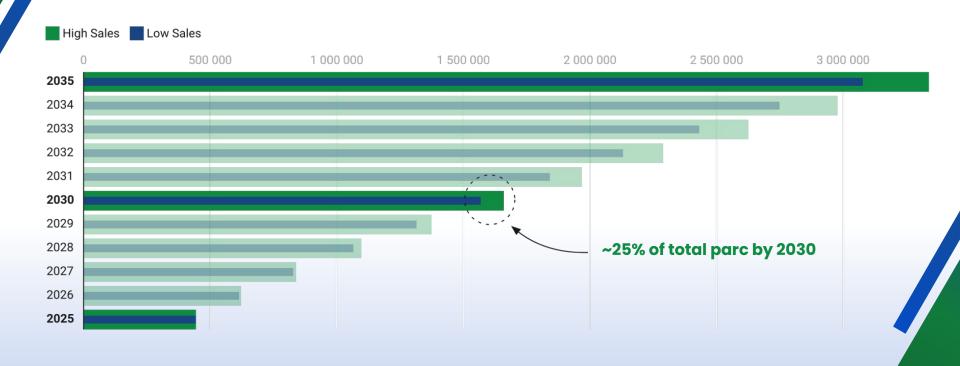


Créé avec Datawrapper

Vehicle Sales



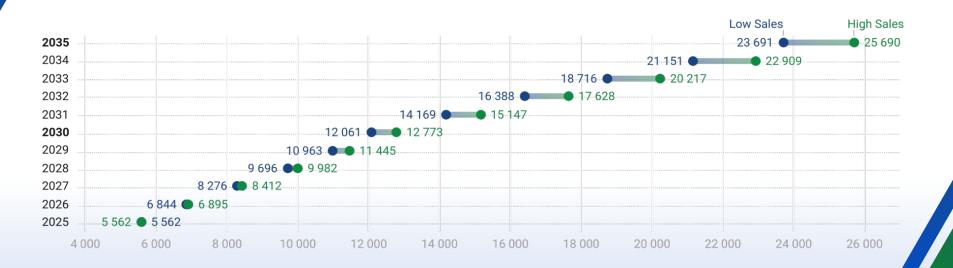
Vehicle Parc



Public AC Chargers



Public DC Chargers



Private (AC) Chargers

Method: estimated 3 private chargers per public charger (cf. NL), includes company chargers



Federal Budget Agreement: Impact on EV sector

MAIN TAKEAWAYS (based on press publications):

| 0 | -170 mio on electricity for households | -3% decrease in accises |
|---|---|---------------------------|
| | -50 mio (2026)90 mio (2027), -135 mio (2028) | |
| | Effect will be accentuated for 'big users' = EV-users | |
| 0 | -300 mio on electricity for corporates | One shot |
| | No details yet | |
| 0 | +365 mio on natural gas for household | 3% increase in accises |
| | 91 mio (2026), 182 mio (2027) en 274 mio (2028) | |
| | Anticipation the VAT hike to 21% in 2030 (!) | |
| 0 | +28 mio on heating oil | 1% increase in accises |
| | 23 euro/1000l → 26 euro/1000l | |
| 0 | +50 mio on diesel and petrol | 0.85% increase of accices |
| | 50 mio out of the 6 bio collected today (= 0,85%) | |
| | % could become higher if consumption goes down | |

Federal Budget Agreement: Impact on EV sector

- MAIN TAKEAWAYS (others):
 - Changes in accises on energy (= first step in the tax shift)
 - o No measures to be taken (yet) to incentivize LDV & HDV
 - Mandatory Mobility Budget

The devil is in the details ⇔ Many details and laws have still to be drafted



Flemish Flex Framework: Approval in Parliament

- Legal framework for flexible contracts has been approved by the Flemish Plenary Meeting on 10/12/2025: <u>LINK</u>
 - EV Belgium position (June 2025) available here <u>LINK</u>



Flemish Tax: Impact on EV sales

Draft law is still pending in the Flemish Parliament: <u>LINK</u>

- Plenary approval expected on 17 December 2025
- Renta (Leasing Sector) reacted strongly to this situation and estimate that about 20.000 leasing contracts will at least be delayed <u>LINK</u> + <u>LINK</u>
- EV Belgium warned the cabinet of the minister already in early November of this potential
 risk:
 - Main messages EVB:
 - Shared our overall discontent (but also understanding the need for income)
 - Shared our concerns about the numbers used
 - Shared our concerns about the LCA reference in the CoS text
 - Asked questions about leasing versus non-leasing
 - Asked questions about the transition period (!)
 - They showed interest in any measures that could support EV adoption that don't require budget/money

Next steps for EV Belgium:

- Provide delayed numbers & LCA studies in support of the draft law
- Draft key proposals (that don't cost money) and support EV uptake





ORES meeting with members: summary

- Three scenarios presented for flex connections implementation
 pending approval by authorities
- From mid-2026 to 2027:
 - Review and extension of flex connections decree
 - Swim lanes/review of first-come, first served principle
 - Pilot local flexibility market (commercial flex)

Cabinet Neven: Task Force Puissance & Flex meeting 1/12

- Participants: CWaPE, Elia, ORES, RESA, SPW, SOFICO, Cabinets Neven & Desquesnes + EV Belgium
- EVB presented forecasts and immediate needs
- All stakeholders are committed to AFIR targets
- SOFICO long-term target: 2x5 MW connection on all service areas



Brussels local taxes: EVB overview

- Following questions from members, media coverage, more and more communes introducing taxes...
 - An <u>overview is now available</u> on the EV Belgium website (must be logged in)
- This list is subject to change over time, please inform us if you notice any changes in decisions so that we can amend the table

Local Taxes on Charge Points in Brussels

| Commune | Gemeente | Type taxed | | Amount | Index | Introduced | Until | Documentation | |
|---------------------------|-------------------------|------------|-------------|----------|-------|------------|---------|------------------|--|
| | | Public | Semi-public | /year/CP | /year | | | | |
| Anderlecht | Anderlecht | | × | 125,00 € | 2% | 01/2025 | 12/2030 | Conseil Communal | |
| Auderghem | Oudergem | | × | 125,00 € | = | 04/2025 | 03/2031 | Règlement-taxe | |
| Berchem-Sainte- Agathe | Sint-Agatha- Berchem | × | × | - | - | - | | - | |
| Ville de Bruxelles | Brussel (stad) | × | × | - | - | - | - | - | |



Position EPBD: Position approved

- Alignment between Regions
 - Conversion ratio for Fast Charging
 - Definitions of ducting & pre-cabling
 - No gold-plating of requirements
- Information & Enforcement
 - Stakeholder information
 - Collect information (PEB certificate, building passport)
 - Last resort: strict enforcement/fines
- Remove barriers for installation in apartments
 - 50+1 majority in VME (federal government)
- Approved by SG Private Charging, WG EV Charging & Board
- Transmission to regional stakeholders



Ongoing Positions

Review all published positions here: LINK

| Topic/Title | we | Importance | Status | Approval/Timing | Publication | LINK ENG | LINK NL | LINK FR |
|--|---|--------------|--------|--|----------------------------|----------|---------|---------|
| Home reimbursement | SG Private Charging | 1. Very High | 99% | Draft to be finalized and approved in the SG, also identify next steps | December | LINK | LINK | LIEN |
| HDV advice | WG Vehicles | 1. Very High | 0% | Draft by September | October | LINK | LINK | LIEN |
| Fire Safetry | WG EV Charging | 1. Very High | 0% | Draft available asap (after event) | December/January | LINK | LIINK | LIEN |
| CO2 standards | SG Passenger Cars | 2 High | 75% | No formal approval | November | LINK | LINK | LIEN |
| TF V2X: Solution for the future? | TF V2X: Solution for the future? WG EV Charging | | 40% | Draft available asap | December | LINK | LINK | LIEN |
| AFIR Guidelines | SG Public Charging | 2 High | 15% | Draft available asap | Before the end of the year | LINK | LINK | LIEN |
| Flemish costless supportiv measures | WG Vehicles | 2 High | 0% | January/February | March 26 | LINK | LINK | LIEN |
| 2nd-hand market advice | WG Vehicles | 2 High | 75% | Draft by June | October | LINK | LINK | LIEN |
| Supply Split | SG Public Charging | 3. Medium | 20% | Approach to be decided | | LINK | LINK | LIEN |
| Restricted Public Chargers | SG Private Charging | 3. Medium | 0% | | | LINK | LINK | LIEN |
| Position Short LEase 2030 | WG Vehicles | 4. Low | 5% | Draft and discussion in Sept | | LINK | LINK | LIEN |
| Vignette | WG Vehicles | 4. Low | | | | LINK | LINK | LIEN |
| VME Guidelines | SG Private Charging | 4. Low | 0% | Draft by December meeting | February 2026 | LINK | LINK | LIEN |



DRAFT (!)

Open to suggestions

Positions: Outlook & Priorities 2026

| | Energy/Grid | | | |
|------------|---|-----------------|-----------------------|--------------------|
| 1. | Congestion management (FIFO, Flex,) | REG | PROACTIVE | Q1 2026 |
| 2. 3. | V2X policy framework Connection costs & grid tariffs | BE FED & REG | PROACTIVE REACTIVE | Q1 2026 Q2 2026 |
| 4 . | EU EMD, MID & GridPackage | FED | REACTIVE | Q2 2026 |
| 5. 6. | Vehicle/Fiscal LDV/HDV fiscal framework Mobility Budget | FED FED | PROACTIVE REACTIVE | Q1 2026 Q1 2026 |
| 7. | Accises (details & implementation) | FED | REACTIVE | Q2 2026 |
| 8. | 2nd hand market | FED & REG | PROACTIVE | Q2 2026 |
| 9. | Reg. Tax | BX | PROACTIVE | Q1 2026 |
| | Charging/Tenders | | | |
| 10. | AFIR (guidelines, review & delegated acts) | FED | PROACTIVE | Q1 2026 |
| 11. | EPBD transposition | REG | PROACTIVE | Q1 2026 |
| 12. | REDIII transposition | FED | PROACTIVE | Q1 2026 |
| 13. | EU CO2 mandate | FED | PROACTIVE | Q1 2026 |
| 14. 15. | AC Tenders review DC Tenders advice | REG WAL | PROACTIVE REACTIVE | Q2 2026 Q1 2026 |

DRAFT (!)

Open to suggestions

Positions: Outlook & Priorities 2026

| Policy & WG Action Plan EVB 2026 | | | | | | | | | | | |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | ост | NOV | DEC |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

6. New Year's Reception

DI **27** JAN (1) 18:00 - 22:00

O Holiday Inn Brussels Airport

New Year's Reception

Start het nieuwe jaar samen met EV Belgium! Op 27 januari 2026 nodigen we u uit voor onze Nieuwjaarsreceptie, een avond vol inspirerende sprekers, toekomstvisies voor 2026 en netwerkmogelijkheden met leden en stakeholders.



More info & registration



6. AoB, next meeting(s) & closure

AoB

- All invites for the 1st half of 2026 will go out in the coming weeks (Update, WG's, Board, ...)
- •

Next Update meeting

Friday 9 January 2025 from 08h30-09h30



Monthly Update

| Date | Time | Location |
|--------------------------|-------------|----------|
| Friday 9 January 2026 | 08h30-09h30 | Online |
| Friday 12 February 2026 | 08h30-09h30 | Online |
| Friday 13 March 2026 | 08h30-09h30 | Online |
| Friday 24 Arpil 2026 | 08h30-09h30 | Online |
| Friday 22 May 2026 | 08h30-09h30 | Online |
| Friday 12 June 2026 | 08h30-09h30 | Online |
| Friday 9 July 2026 | 08h30-09h30 | Online |
| Friday 11 September 2026 | 08h30-09h30 | Online |
| Friday 9 October 2026 | 08h30-09h30 | Online |
| Friday 13 November 2026 | 08h30-09h30 | Online |
| Friday 11 December 2026 | 08h30-09h30 | Online |





EV Belgium vzw/asbl

Thank You

For Your Attention







Compliance & Antitrust Statement

All members of EV Belgium always comply with the rules of competition law. For this, the members participating in any meeting always take into account the following elements and information:

- The companies and people participating are committed to free and fair competition.
- . They have therefore planned to exchange information in accordance with the rules of competition law and have appropriate antitrust compliance measures in place.

In view of the above, the participants will jointly ensure that only content specified in the previously shared agenda will be discussed and that sensitive content will not be addressed (see table below). If a member has any antitrust concerns about the course of the discussion, these will be recorded in the minutes and the meeting suspended.

For more information and links:

- VBO: LINK
- Belgian Competition Authority: LINK

| func | 2USS or SHARE the following information if it will benefit the ctioning of the association/meeting: | AVOID/STOP discussions or exchanges of anything that may concretely influence the future market behaviour of the members/companies, including the following information the following information: |
|--------|---|--|
| >>>> > | General economic indicators General Industrial outlook Regulatory evolution and its impact on the e-mobility sector Data truly publicly available and available at no extra cost Always try to provide aggregated figures or estimates (without sharing individual company information) to public authorities when assessing a | Prices, discounts, margins, credit terms, guarantees, instalments and other conditions applied by businesses Individual company data on costs, production, investments, capacity, stocks, sales, orders and/or profits Individual business strategies on the development, design, production, distribution or marketing of certain products Individual offers regarding contracts of specific products or requests for quotation |
| ~ | financial impact of new regulations Always consult legal counsel when in doubt | Information regarding existing or potential competitors, suppliers, distributors or customers that could have the effect of excluding them from the market Any other information that you or any participating company consider to be sensitive, even if not contained in this overview |

