

## Press Release

# Ayvens European Mobility Guide 2026: Electrification goes mainstream as taxation reshapes fleet strategies across Europe

Paris, 26 May 2026

**Ayvens is releasing its 2026 European Mobility Guide, a yearly reference publication designed to provide fleet managers with a global comprehensive country-by-country analysis of the pace of electrification. Drawing on Ayvens' extensive operational data and expertise across 30 European countries, this new edition reflects markets entering a new phase. Availability of electric passenger vehicles (EV) models is no longer a limiting factor across Europe, while taxation and regulation have become a decisive factor influencing fleet strategies.**

In response to this evolution, Ayvens has refined its EV maturity scoring methodology compared to previous edition. Countries are now assessed on five core pillars, producing an overall maturity score on a scale out of 100: EV adoption, charging infrastructure, taxation and regulation, BEV vs ICE total cost of ownership (TCO) and sustainability of electricity. Based on this scoring, European countries are classified into three levels of EV maturity: Developed, Transitioning and Emerging.

### **Key findings from the 2026 edition:**

- Tax incentives are now the strongest driver of fleet electrification decisions in Europe;
- Norway, the Netherlands and Sweden remain the most mature EV markets. Southern European countries progress more gradually;
- Charging infrastructure remains the main barrier in Eastern Europe;
- Total cost of ownership now favours EVs in a growing number of fleet segments.

### **Europe's EV maturity remains uneven**

Northern and Western European continue to lead the transition. Norway (93/100) once again stands out as the most advanced EV market, followed by Belgium (78/100) and the Netherlands (74/100). These countries benefit from favourable taxation, mature charging networks and favourable BEV economics. France illustrates well this trend. With an EV maturity score of 65/100, it ranks among Europe's "Developed" markets, combining relatively strong adoption levels with competitive economics for electric vehicles. BEVs already offer a cost advantage over ICE vehicles (€0.33/km vs. €0.41/km),

reinforcing their attractiveness for fleet operators. While recent regulatory changes are further strengthening the shift toward low-emission fleet.

In contrast, Southern and Eastern European markets, such as Italy (54/100) and Spain (53/100) are progressing at a slower pace, reflecting disparities in taxation frameworks, charging readiness and consumer adoption. While some countries have moved into the “Transitioning” category, such as Slovenia (46/100) and are closing the gap with the mature category, such as Ireland (59/100), electrification remains a mid-term journey for many markets.

### **Taxation has become a strategic driver of fleet decisions**

Across Europe, 2025 and 2026 marked a turning point, with governments shifting away from broad EV subsidies towards more targeted, long-term fiscal mechanisms. In many countries, incentives for internal combustion engine (ICE) vehicles and plug-in hybrids are being progressively phased out, while penalties on high-emission vehicles are tightening.

As a result, fleet managers increasingly need to align vehicle choices with evolving national tax rules, benefit-in-kind regimes and EU regulatory developments.

### **BEVs are now cost-competitive across most Western European markets**

This guide shows that BEVs are cost-competitive with ICE vehicles in most Northern and Western European countries, thanks to improved taxation advantages and lower total cost of ownership. Portugal emerges as one of the most competitive BEV markets in terms of cost per kilometre.

However, TCO competitiveness remains more challenging in some parts of Eastern Europe, where ICE vehicles still benefit from lower upfront and operating costs.

### **Charging infrastructure continues to expand – but confidence remains uneven**

Public charging infrastructure has scaled rapidly across Europe, with more than 1.2 million public charging points deployed by the end of 2025. Yet infrastructure density and accessibility still vary significantly by country, contributing to different adoption speeds and persistent range anxiety among drivers.

*“What now shapes electrification in Europe is not ambition alone, but the practical realities of each market – from tax frameworks to charging readiness and total cost of ownership,”* explains Amélie de Valroger, Global Director Innovation, Products and Consultancy at Ayvens. *“In a context marked by economic pressure and evolving policy landscapes, those factors have become decisive levers in fleet strategies. With our 2026 Mobility Guide, we provide fleet managers with a clear, fact-based understanding of local realities, empowering them to make confident, forward-looking decisions and adapt their electrification roadmaps across Europe.”*

### Notes to editors:

- For the first time, the Mobility Guide is split into two editions, with Europe addressed in this 2026 release, available for download [here](#) - The rest of the world to follow later in the year.
- The 30 countries included in the European Mobility Guide are: Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Serbia, Spain, Slovakia, Slovenia, Sweden, Switzerland, UK and Ukraine.
- In this year's edition, the methodology has been refined for assessing the EV maturity of countries. As electrification has moved from trend to mainstream reality, certain KPIs, such as vehicle availability, have been removed, given that electric models are now widely accessible across Europe. See scoring rationale on page 8 of the guide.
- BEV TCO is more competitive in Europe than ICE in 14 countries (13 countries in Mobility Guide 2024 – same scope). We noted a general BEV TCO downward trend in almost all Western EU markets from 2025 whereas most countries no longer grant governmental subsidies.

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### About Ayvens

Ayvens is a leading global sustainable mobility player committed to making life flow better. We've been improving mobility for decades, providing full-service leasing, flexible subscription services, fleet management and multi-mobility solutions to large international corporates, SMEs, professionals and private individuals.

With more than 13,000 employees across 41 countries, Ayvens manages 3.1 million vehicles and one of the world's largest multi-brand EV fleet.

The company is listed on Compartment A of Euronext Paris (ISIN: FR0013258662; Ticker: AYV). Societe Generale Group is Ayvens majority shareholder.

Find out more at [ayvens.com](https://www.ayvens.com)

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