



Fastned Congres Laadinfra // 18 Januari 2024

Toegankelijk snelladen

als enabler voor exponentiële marktgroei EV's

Pleidooi voor een level playing field

Tuur De Coninck - Country Manager Fastned België



Accepting all types of vehicles

All brands, trailer accessible, including vans and small trucks

Price transparency & ease of use

Via screens & payment terminals, long before they were obligatory

Wheelchair accessible

12 years of experience in fast charging station design

01 Fastned

Our mission

Accelerate the transition to electric mobility by giving freedom to electric drivers



Our goal

A European network of 1,000 large stations



Our climate impact

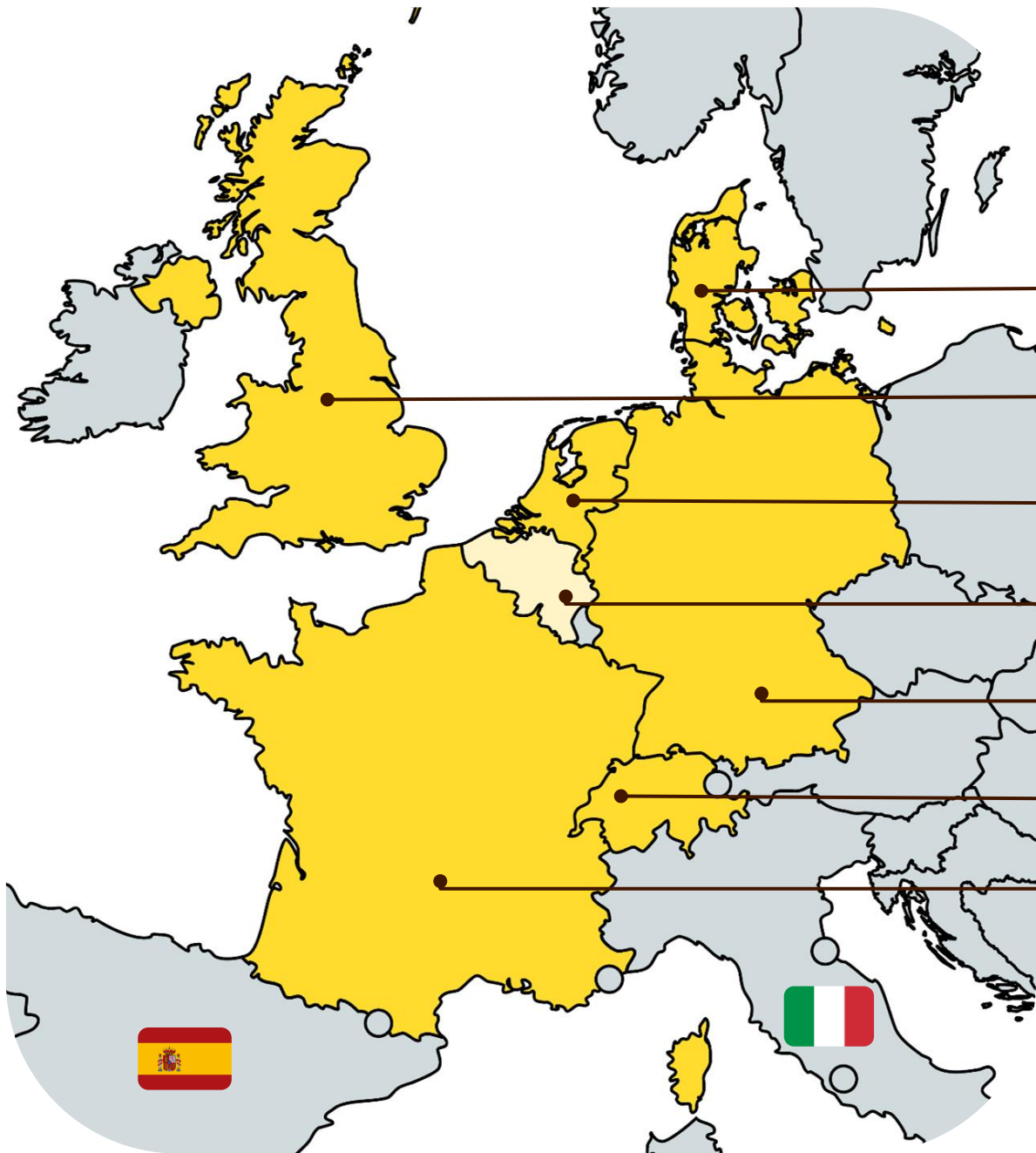
With every kWh sold we displace fossil fuels burning into the atmosphere



100% local sun & wind energy¹



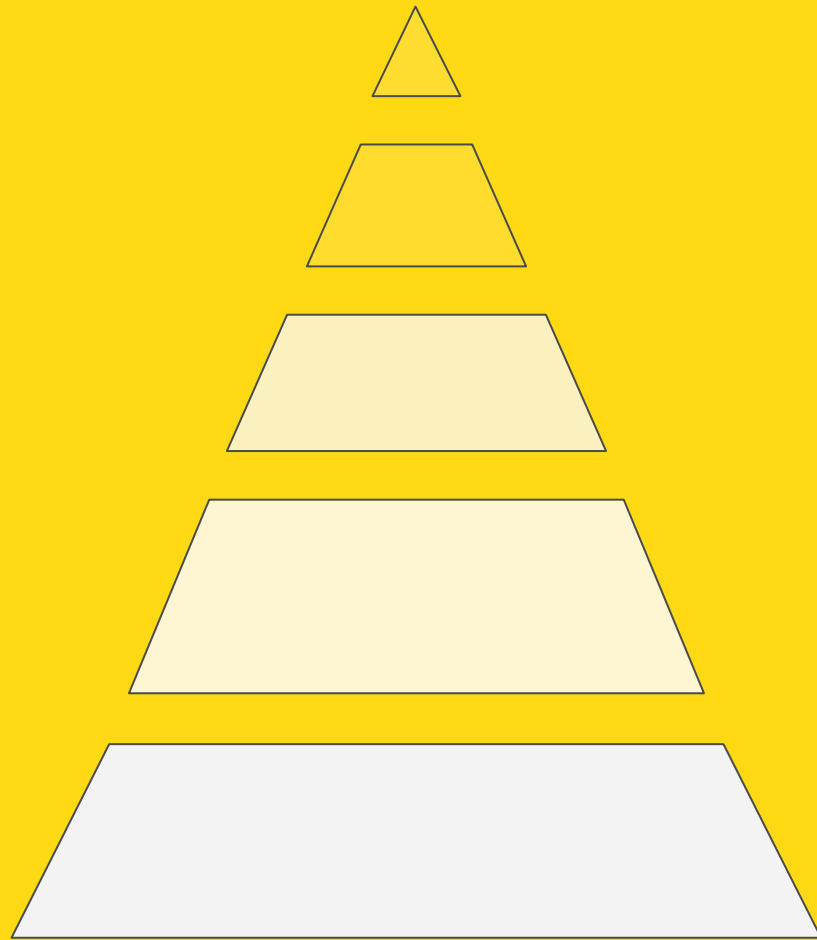
1) For every kWh sold through the grid we buy local (same or adjacent country) solar&wind guarantees of origin



299 Stations in Europe

- 1 in Denmark 
- 21 in the UK 
- 168 in the Netherlands 
- 25 in Belgium 
- 39 in Germany 
- 7 in Switzerland 
- 38 in France 

Location availability



On highway

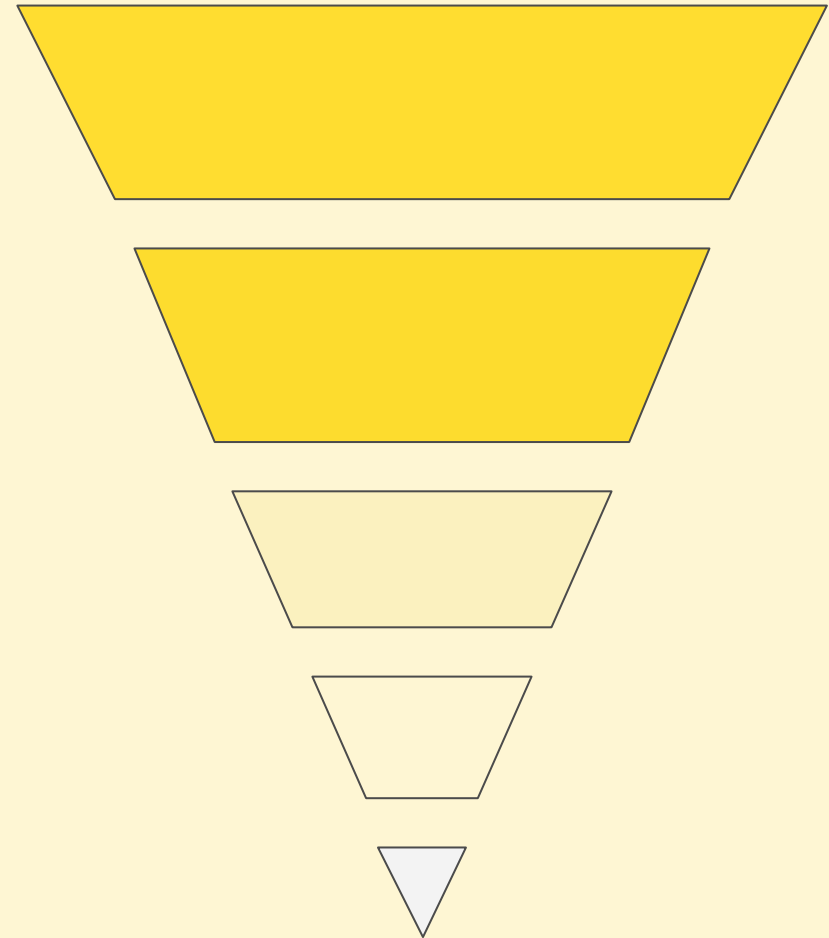
Highway exits

National roads

Urban roads

Other & destination

Portfolio ambition




Fastned remains the top choice for EV drivers

Google Reviews
4.4 / 5

Highest Google reviews in the market
vs. competition between 3.3 and 4.1

Customer Net Promoter Score of **60**, considered **excellent**

 Which fast charging network is your favourite?

42%  **Fastned**

31%  **TESLA**

15%  **IONITY**

8%  **Shell Recharge**

1%  **McDonald's**

1%  **TotalEnergies**

2% **Other**

 Association of electric drivers
Golden Plug Award



“Fastned played a crucial role in facilitating electric driving by offering high-end charging infrastructure. Their commitment contributes to building trust from aspiring and experienced EV-drivers.”

- Marina van Helvoort, VER Director

Best EV charging networks 2023 Rapid / En-route				
Rank	EV network	Overall rating*	Star rating**	Equivalent Rank 2022***
1	 FASTNED	4.3	★★★★★	1
2	 mfg EVPOWER	3.9	★★★★☆	1
3	 Osprey	3.8	★★★★☆	4
4	 IONITY	3.7	★★★★☆	5
5	 INSTAVOLT	3.6	★★★★☆	3
6	 GRIDSERVE	3.2	★★★★☆	6
7	 ChargePlace Scotland	3.1	★★★★☆	7
8	 SWARCO E.CONNECT	3.0	★★★★☆	8
9	 Shell Recharge	2.9	★★★★☆	9
10	 bp pulse	2.3	★★★☆☆	11
11	 GeniePoint	2.0	★★★☆☆	10

Highest score in UK driver survey¹
~3600 EV drivers surveyed

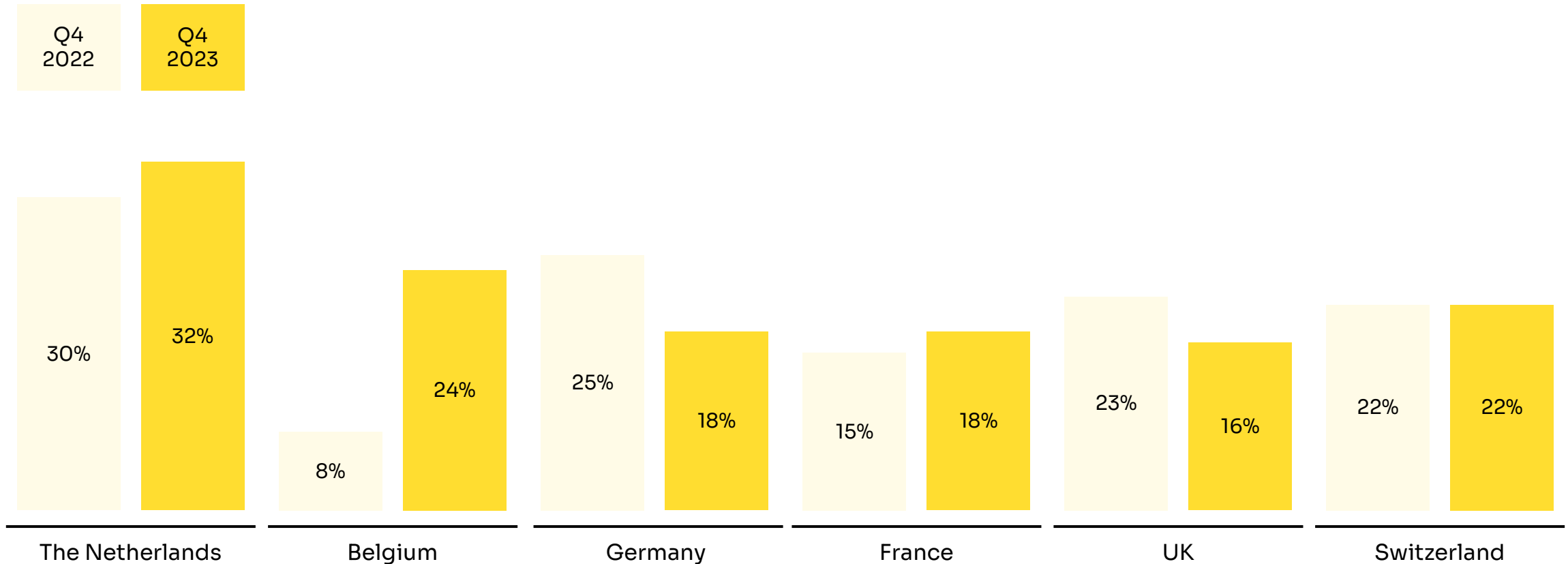
1) Zapmap Best EV Charging Networks 2023

02

Exponentiële groei EV-markt

Verkoop volledig elektrische auto's verdrievoudigd

BEVs as a % of total car sales¹

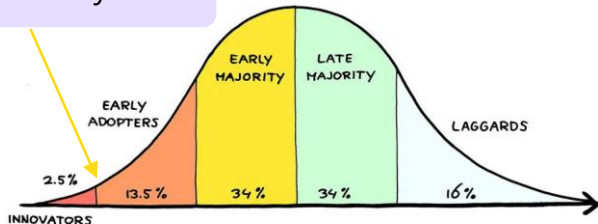


1) ACEA - December, December data not published at the time of the release

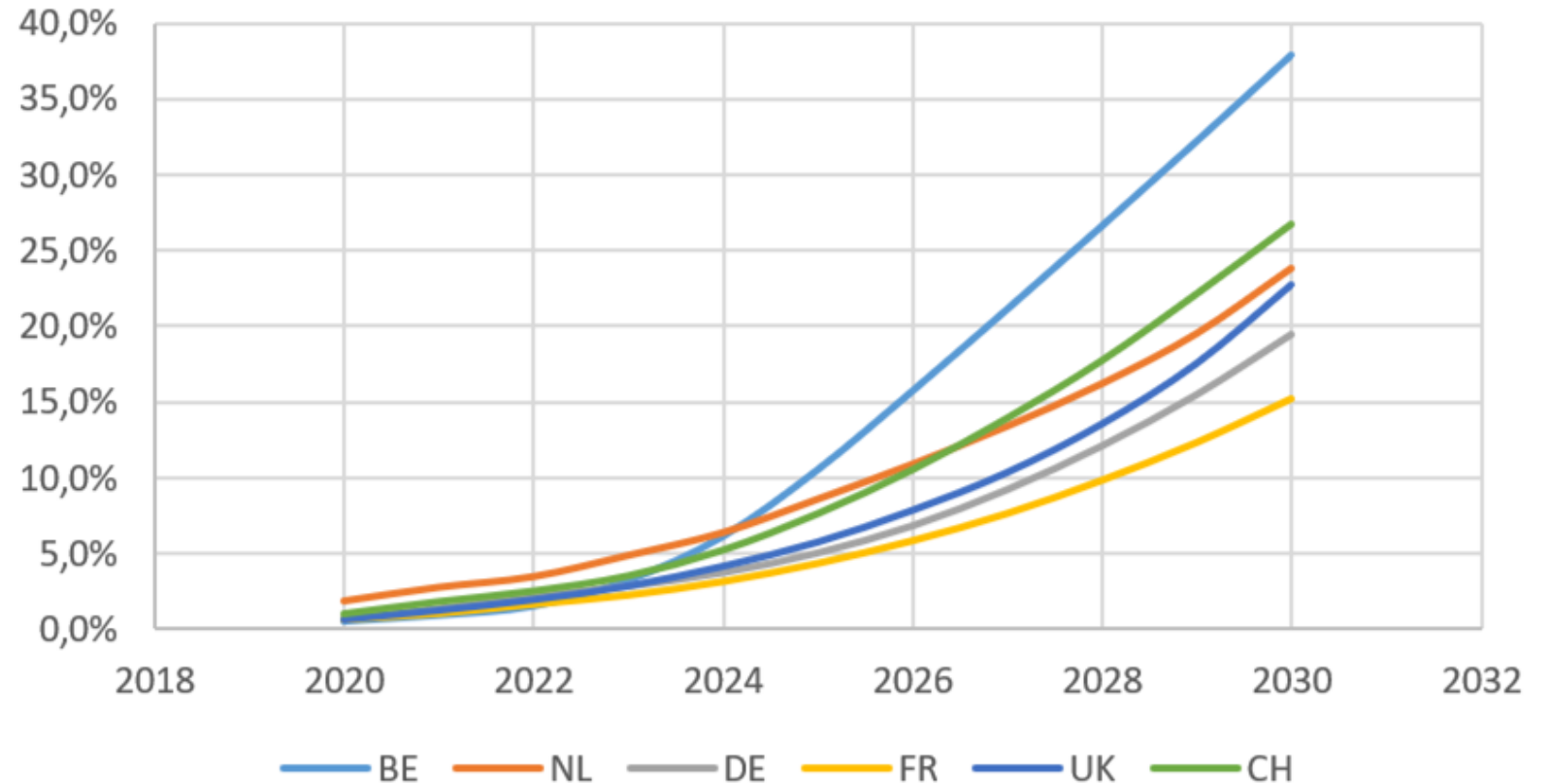
België op kop

- 2024 wordt sleuteljaar
- Bedrijfsvoertuigen als drivers
- Nood aan versnelling uitrol laadinfrastructuur
- 2020: kip-ei
- 2025: kip-ei 2.0

We're only here!



BEV penetration forecast



40–70% van de gezinnen kan thuis **niet** laden



The EV revolution began with cars in the higher price segments, granting many buyers access to home charging.



In various countries, approximately 40–70% of households lack access to off-street parking.

België op kop

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- 2020: kip-ei
- 2025: kip-ei 2.0
- Nood aan versnelling uitrol snellaadinfrastructuur

1/10
(CPE/CAR)

22 kW = 2 CPE
300 kW = 20 CPE
400 kW = 20 CPE?

Publiek laadnetwerk in Europa

	BE	NL	FR	DE	UK
AC Laadpunten	14091	95895	68250	77112	28029
DC Laadpunten	2307	4723	3062	1824	547
AC CPE	14091	95895	68250	77112	28029
DC CPE	23070	47230	30620	18240	5470
Totaal CPE	37161	143125	98870	95352	33499
Aantal BEVs	138749	373950	978218	1307901	850598
Ratio CPE/BEV	27%	38%	10%	7%	4%

<https://statbel.fgov.be/en/themes/mobility/traffic/vehicle-stock#figures>

<https://www.rvo.nl/sites/default/files/2023-06/Statistics-Electric-Vehicles-and-Charging-in-The-Netherlands-up-to-and-including-May-2023.pdf>

<https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables>

https://www.kba.de/DE/Statistik/Fahrzeuge/Bestand/Vierteljaehrlicher_Bestand/vierteljahrlicher_bestand_node.html

<https://www.avere-france.org/publication/barometre-novembre-2023-les-immatriculations-des-vehicules-electriques-passent-le-cap-des-1-500-000-immatriculations/>

Toenemende laadsnelheid

Hyundai IONIQ 5

Volkswagen ID.4

Hyundai / Kia released the first **800 volt mid-market platform**

800 volt platforms expected to **become a standard over the coming years**



Battery size

72.6 kWh

82.0 kWh

Range

430 km¹

496 km¹

Charging speed

Peak: 232 kW | Average: 175 kW² | Time: 18 min³

Peak: 125 kW | Average: 94 kW³ | Time: 36 min³

Comments

800 volt platform allowing for faster charging

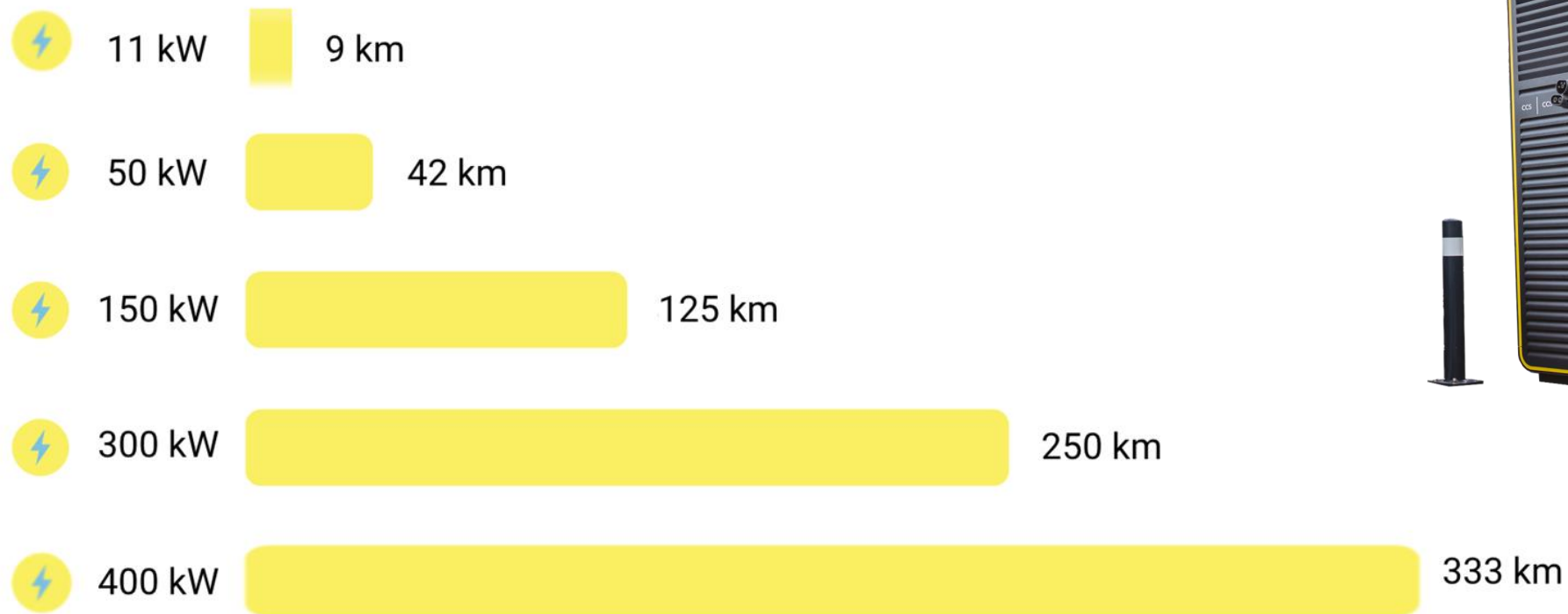
First SUV of VW based on a 400 volt platform

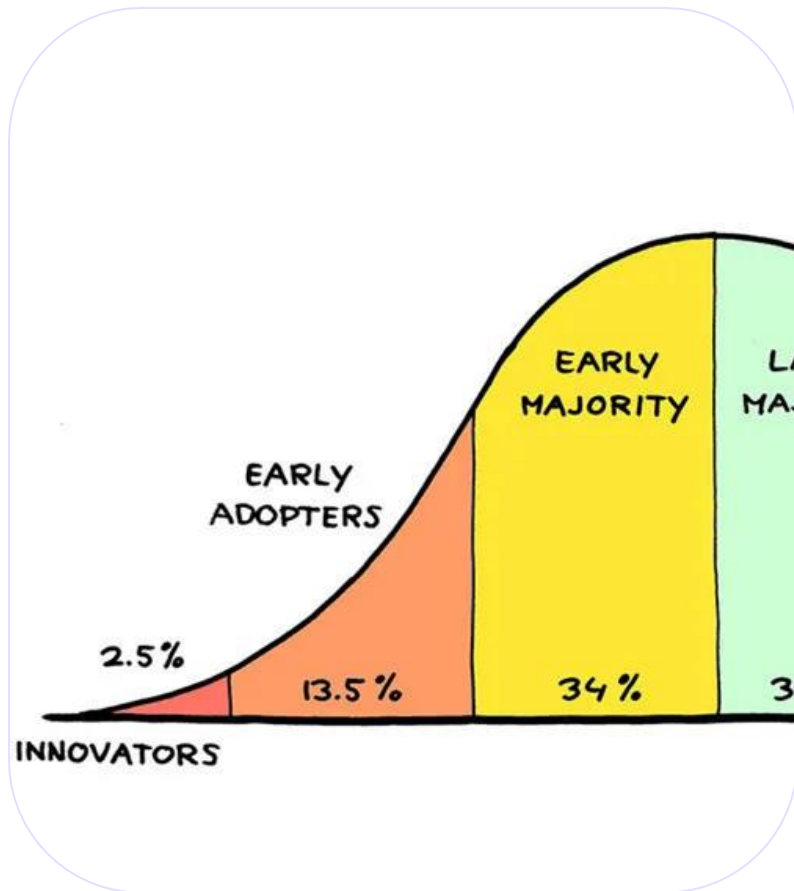
Source: Electric Vehicle Database (ev-database.org)

1) WLTP range, 2) Assuming charging at 350 kW charge point for Hyundai and 150 kW for VW, 3) From 10 to 80% charge

Toenemende laadsnelheid

Extra rijbereik in 10 min.





Snel groeiend elektrisch wagenpark


Verdubbeling in 2024!

Verhoogde nood aan publieke laadinfrastructuur

Beperkte opties thuisladen

Toenemende laadsnelheden bij wagens en laders

Evolutie naar het 'tankmodel'
Hogere CPE waarde



03

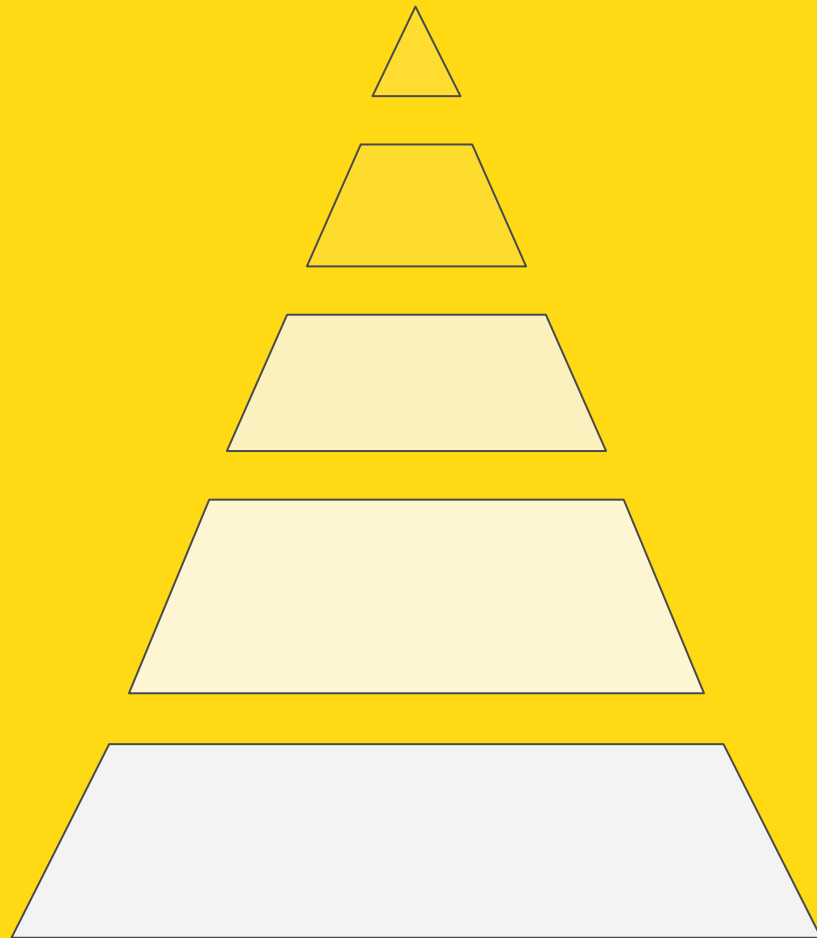
snelladen
als enabler

03

Toegankelijk snelladen als enabler

Pleidooi voor een level playing field:
breng de concessiezones naar de markt

Location availability



On highway

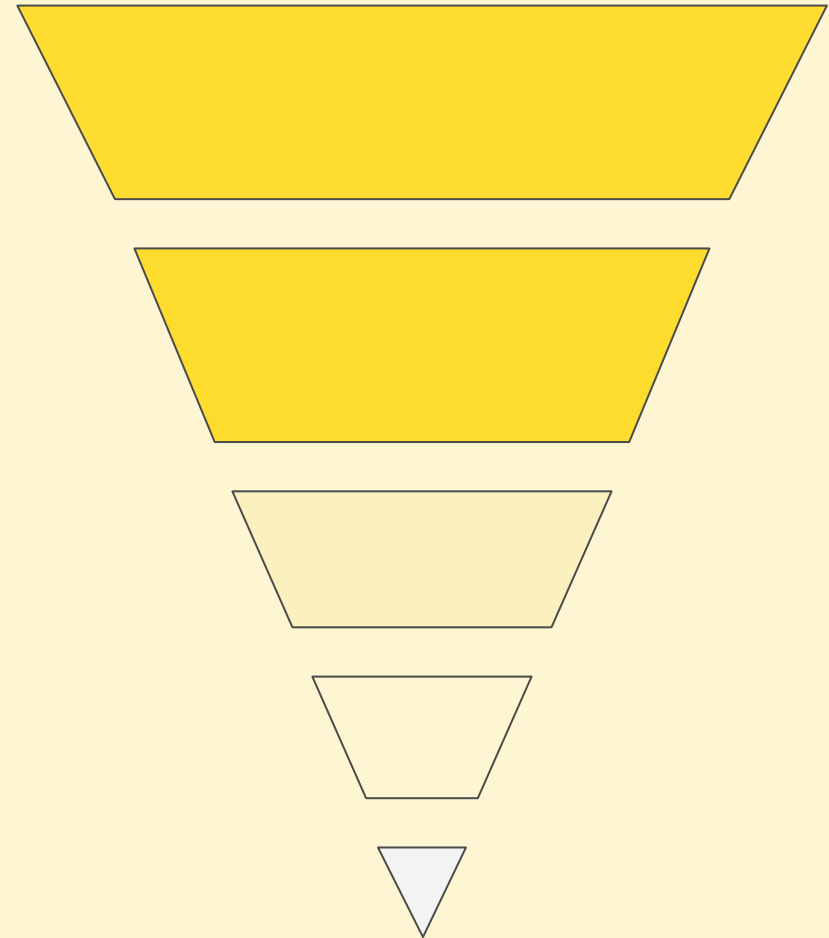
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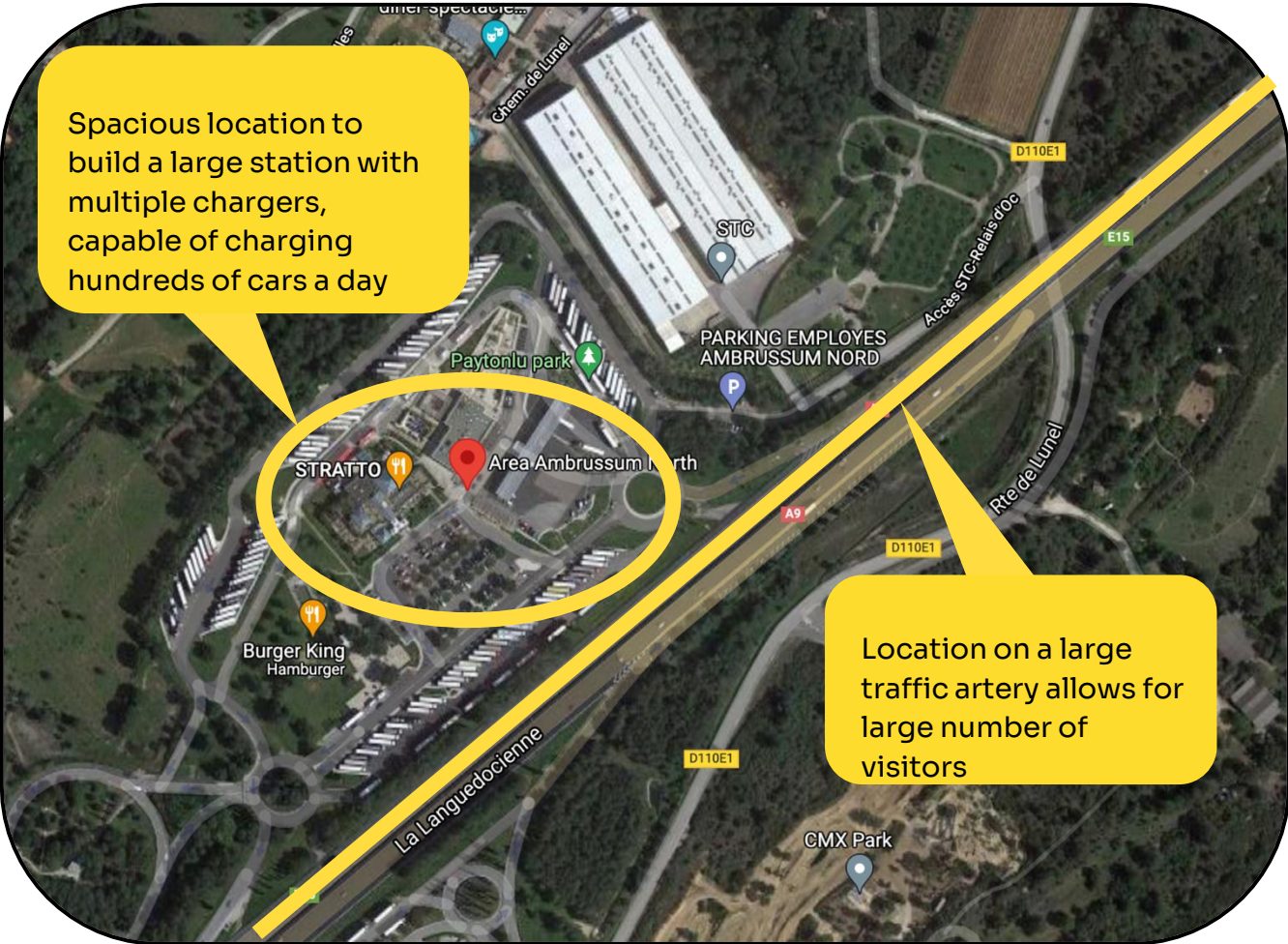
Other & destination













Portfolio ambition



Verzorgingsplaatsen langs snelwegen

Drukke hotspots in het beheer van de overheid



Country	Est. MSA's
 Germany	360 up to 560
 France	660
 Italy	480
 Spain	300 up to 800
 Netherlands	245
 Scandinavia	Up to a ~100
 Belgium	100 up to 200
 Luxemburg	6
 Switzerland	62-162
 Denmark	80-120
 UK	130
 Rest of EU	500-800
Total	~4,000

Source: open data, Fastned analysis | Maps Data: Google, ©2022 Maxar Technologies

The future of service areas in Europe



- ✔ In Q1 2023, Fastned won first ever fully dedicated service areas tender
- ✔ Fastned was able to prove its concept against multiple competitors
- ✔ Gentbrugge (Belgium) tender gives us a glimpse into the future of service areas
- ✔ Dutch new service areas policy proposal advocates for a similar structure
- ✔ AFIR will accelerate the realization of infrastructure of this size and type across Europe in the coming years

Memorandum EV Belgium



Vraag om wijziging concessies langs snelwegen

“ The **concession policy for highway parkings** is no longer adapted to the current context and **represents a brake** on the development of charging infrastructure along the most important traffic axes”

“EV Belgium demands **a new policy framework** for *future tenders* that provides maximum support for electrification **aligned with EU joint tendering and unbundling principles**. A distinction is to be made in the new concessions for the **various services** offered, such as electric charging or fossil fuel refueling, in line with European legislation.”

Standpunt Fastned



Vraag om wijziging concessies langs snelwegen!

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and bring ALL concessions to the market!



The future of service areas in Europe...

... in Gentbrugge in 2025

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