

England's Economic Heartland Board

24 September 2026

Item 9b: EV Zero Emission Vehicles Mandate Consultation and Driveway Data

It is recommended that Board:

- a) Notes the Government's review of the Zero Emission Vehicle (ZEV) Mandate and the potential implications for transport decarbonisation, EV charging infrastructure investment and transport planning assumptions.**
- b) Provides a steer on whether EEH should prepare and submit a response to the Government's consultation on behalf of the partnership.**
- c) Notes the availability of the Off-Street Parking driveway dataset.**

1. Purpose

- 1.1. To update the Board on the Government's review of the Zero Emission Vehicle (ZEV) Mandate, consider the potential implications for local authority partners and transport decarbonisation, and seek a steer on whether EEH should submit a consultation response.

2. Key points to note

- 2.1. The Department for Transport has now launched a formal review of the Zero Emission Vehicle Mandate, to consider whether the current electric vehicle sales trajectory, compliance arrangements and treatment of vehicle technologies remain appropriate as the market develops.
- 2.2. Many local authorities within the EEH region have developed Electric Vehicle Infrastructure Strategies and secured funding through programmes such as LEVI.
- 2.3. Whilst the consultation does not propose abandoning the transition to zero emission vehicles, any significant adjustment to the pace of adoption could influence future investment decisions and demand forecasts.
- 2.4. Board members are invited to consider whether EEH should submit a partnership response to the consultation, recognising that many constituent authorities may also respond individually.
- 2.5. EEH's STB partners TfN, have developed an AI-derived dataset that identifies residential properties with and without driveways using high-resolution aerial imagery and Ordnance Survey data.

3. Context

- 3.1. The ZEV Mandate was introduced to provide certainty to vehicle manufacturers and the wider market regarding the transition from petrol and diesel vehicles to zero emission alternatives



- 3.2. The Department for Transport has now launched a formal review of the Zero Emission Vehicle Mandate, with consultation open until 23 October 2026.
- 3.3. The review is considering whether the current electric vehicle sales trajectory, compliance arrangements and treatment of vehicle technologies remain appropriate as the market develops.
- 3.4. The consultation is seeking views on several aspects of the Mandate, including annual sales trajectories, manufacturer flexibilities, the treatment of plug-in hybrid vehicles and a range of technical compliance mechanisms.
- 3.5. The review is significant because the ZEV Mandate sits at the centre of many assumptions regarding future vehicle ownership, fleet composition, carbon emissions and charging infrastructure requirements. Any material changes could therefore have wider implications beyond the automotive sector.
- 3.6. The Committee on Climate Change's Seventh Carbon Budget continues to assume rapid electrification of the vehicle fleet as the primary pathway to decarbonising road transport.

4. Implications for EEH authority partners

- 4.1. Many local authorities within the EEH region have developed Electric Vehicle Infrastructure Strategies and secured funding through programmes such as LEVI.
- 4.2. Alongside public investment, authorities have entered commercial arrangements with charge point operators and infrastructure providers.
- 4.3. These arrangements are typically underpinned by assumptions regarding future EV ownership and charger utilisation.
- 4.4. Whilst the consultation does not propose abandoning the transition to zero emission vehicles, any significant adjustment to the pace of adoption could influence future investment decisions and demand forecasts.
- 4.5. Authorities may therefore wish to understand whether any changes emerging from the review have implications for existing infrastructure plans, commercial agreements and future funding requirements.
- 4.6. Given these direct local implications, it is anticipated that many local authorities may choose to submit their own consultation responses.

5. Climate Change Committee Seventh Carbon Budget

- 5.1. The Climate Change Committee's Seventh Carbon Budget identifies road transport electrification as a key component of the UK's pathway to achieving net zero emissions.
- 5.2. The Committee's recommended pathway assumes:
 - Around 55% of new car sales are electric by 2027.
 - Around 95% of new car and van sales are electric by 2030.
 - 100% of new car and van sales are electric by 2035.
 - By 2040, around 80% of cars and 74% of vans on UK roads are electric.
- 5.3. The Committee notes that this trajectory is slightly ahead of the current ZEV Mandate pathway but considers it achievable due to declining battery costs, improving vehicle affordability and lower operating costs for many motorists.
- 5.4. This provides an important strategic context for the consultation. Whilst Government is reviewing the operation of the Mandate, the UK's independent climate advisor continues to assume a rapid transition to electric vehicles within its recommended decarbonisation pathway.



6. Policy implications and considerations for EEH

- 6.1. EEH with the backing of this Board and authority officers, has consistently supported transport decarbonisation (particularly the deployment of charging infrastructure across the region) through its policy work, evidence base and support to local authority partners.
- 6.2. EEH's ability to combine data, provide regional context and support evidence-led decision making was seen as valuable to officers when developing business cases, Local Transport Plans and investment plans for EV infrastructure.
- 6.3. However, as many authorities may choose to submit their own responses, the Board may wish to consider whether a separate EEH response would add value, providing a regional perspective focused on investment certainty, infrastructure planning and delivery of transport decarbonisation.
- 6.4. If the Board do see value in this EEH would value further input as to what themes such a response should focus upon.

7. Off Street and Driveway Parking availability for EV charging

- 7.1. EEH's STB partners TfN, have developed an AI-derived dataset that identifies residential properties with and without driveways using high-resolution aerial imagery and Ordnance Survey data.
- 7.2. By combining emerging technologies with nationally available datasets, EEH is providing local authority partners with insights that would be difficult and costly to develop individually. This enables authorities to make more informed decisions about electric vehicle infrastructure investment and target limited resources where they can have the greatest impact.
- 7.3. As the transition to electric vehicles accelerates, understanding where residents can reasonably access home charging will become increasingly important.
- 7.4. The dataset provides a consistent evidence base across the region, supporting local charging strategies, bid development and wider transport decarbonisation planning. It also highlights the potential for EEH to continue adding value through the development of shared data products that reduce duplication, strengthen local capability and support better outcomes for residents and businesses across the Heartland.

8. Next Steps

- 8.1. Subject to the Board's steer, officers will:
 - Monitor the progress of the consultation and any emerging policy announcements.
 - Engage with local authority partners to understand any issues arising from existing EV infrastructure investment programmes.
 - Prepare and submit a consultation response on behalf of EEH if requested by the Board.
 - Report back on the outcome of the review and any implications for EEH's decarbonisation and transport planning activities.

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