



**Zemo
Partnership**
Accelerating Transport to Zero Emissions

Zero Emission Bus Workshop

London, 24th May 2023

In partnership with:

enel x

abellio
london



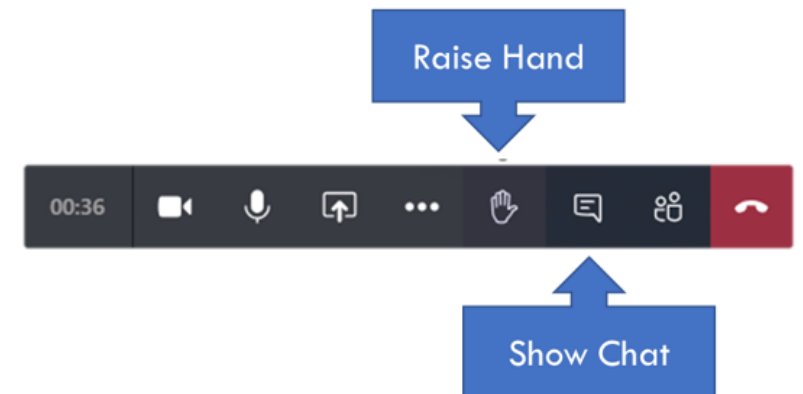
Housekeeping

Physical

- ⌚ No fire alarm test planned today. In the event of an alarm, head out of the lecture theatre and go to the fire assembly point in the car park.
- ⌚ Toilets can be found in the Main Reception or in the Shannon Conference Suite.
- ⌚ Hi-Vis jackets will be provided for the site visit – to be worn at all times for your safety and the safety of others.
- ⌚ Please follow direction of site guides at all times during depot visit for your safety and the safety of others.

Online Attendees

- ⌚ Other than presenters, we request that webcams be switched off to save bandwidth for those with less stable broadband connections.
- ⌚ Mics will be muted while the main presenter talks, but there will be regular dedicated breaks to allow for comments and questions.
- ⌚ If you do have a question, type it using the chat feature and the presenter/moderator will be able to read your comment and respond accordingly.
- ⌚ **Meeting will be recorded**, and recording will be made available on the Zemo website after the event. Slides from the day will also be made available after the event.



Agenda



09:00 Welcome & Registration

10:00 Presentations

National outlook and market overview	<i>Zemo Partnership</i>
Introduction to Enel-X and considerations for operators introducing BEVs	<i>Enel-X</i>
Engaging with DNOs / IDNOs and connecting to the grid	<i>ESP Utilities</i>
Infrastructure and civils works	<i>Cleaner EV</i>
Developing ZEBs for operators needs	<i>Wrightbus</i>
Leasing models for ZEBs	<i>Rock Road</i>
Turnkey solutions for BEVs	<i>Enel-X</i>
An operator's perspective on introducing BEVs	<i>Abellio London</i>

11:20 Refreshment Break

11:45 Panel Discussion and Q&A

12:30 Site Visit and Vehicle Walkaround / Lunch

14:30 End

Introduction

Tim Griffen, Zemo Partnership

Introduction

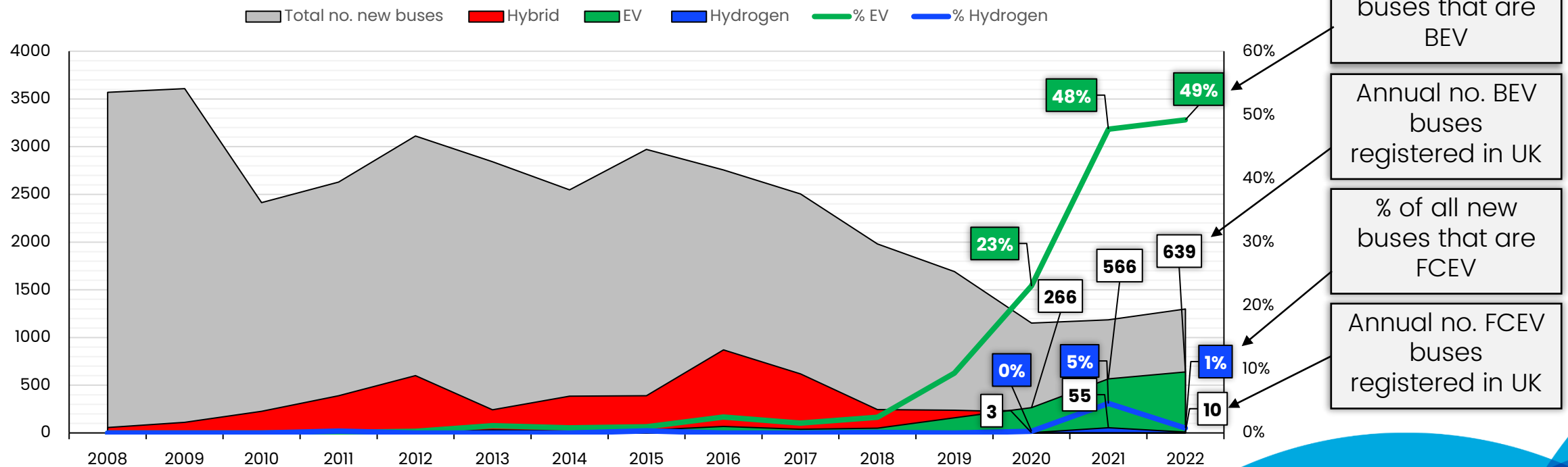
UK Market Overview

- ④ Historic average of 2,000–3,000 bus and coach registered annually but **market shrinking since 2015 – just over 1,000 registrations in 2021 and 2022.**
- ④ **Major uncertainty** around passenger numbers post-Covid combined with inflationary pressures makes **investment planning challenging** for operators.
- ④ Operators have begun decarbonising fleets despite these challenges, **supported by significant grant funding schemes** provided by UK Government and devolved administrations.
- ④ **UK bus industry is now leading the adoption of zero emission buses** across Europe – 50% of buses registered in 2022 and 2021 were zero emission (expected to be 50% – 60% in 2023).
- ④ **Zero emission is now the standard** for many operators, with **battery electric technology** currently accounting for the vast majority of vehicles.

UK Zero Emission Bus Uptake

- ⌚ For the second year running, equated to **around 50% of total bus uptake** in the UK.
- ⌚ Zemo Partnership expect zero-emission registrations to account for **between 50-60% of total bus uptake** in 2023, with **battery electric vehicles continuing to make up the majority** of these vehicles.

New Bus Registrations inc. Hybrid, EV and Hydrogen



*Up to January 1st 2023

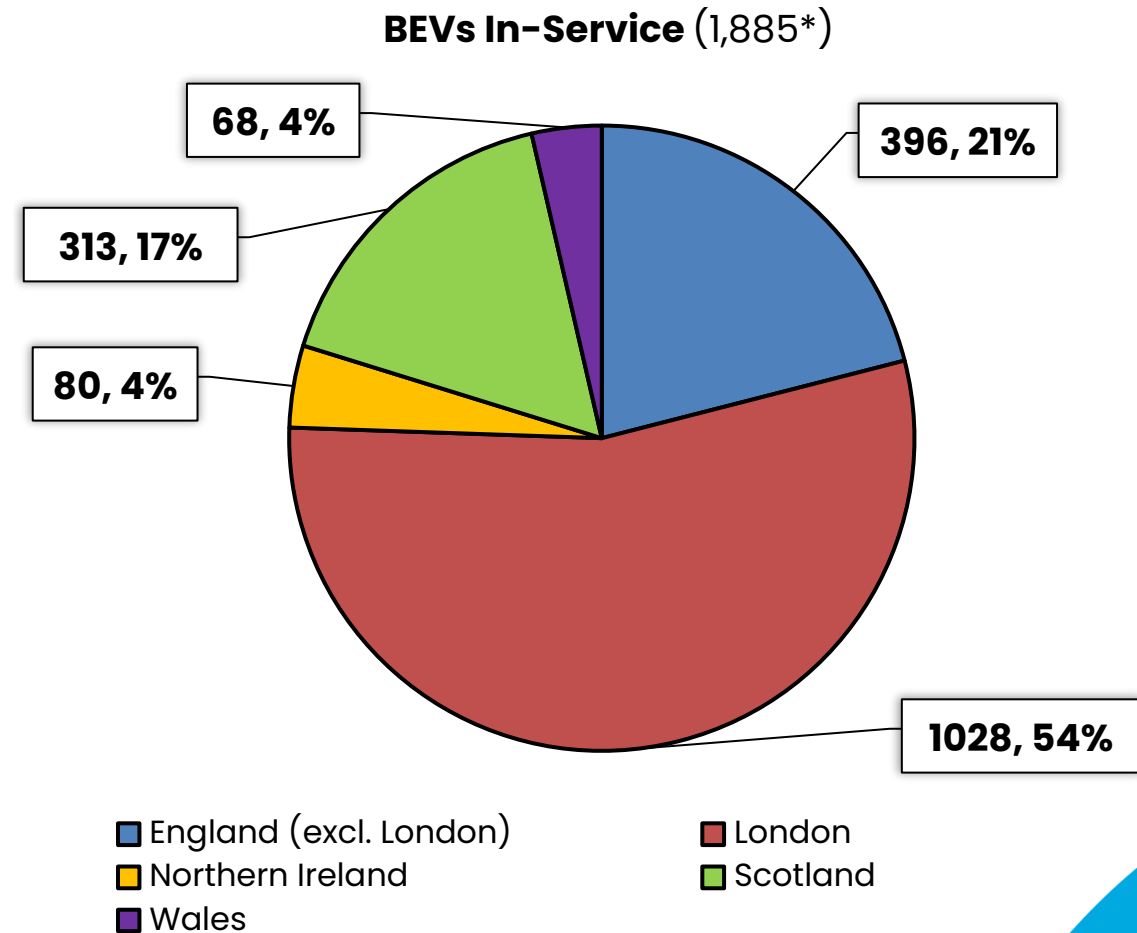
Battery Electric Buses In-Service by Region

Nearly 2,000 ZEBs in-service across the UK

- BEVs account for **nearly 97% of all ZEBs** in-service today.
- Over **900 in-service in London, almost 50% of UK BEV total**. (Equates to over 10% of TfL fleet).
- As early adopters of ZEBs, Transport for London and operators have been key to **driving uptake and technology development**.
- Adoption of BEVs continues to grow in other areas of the UK too thanks to schemes like:
 - Zero Emission Bus Regional Areas (ZEBRA) Scheme** in England
 - All Electric Bus City** in England
 - ScotZEB Challenge Funds** in Scotland
 - Welsh and Northern Ireland Assembly funding

*Up to January 1st 2023

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Panel Discussion

Site Visit and Lunch

Site Visit



Group 1	Group 2
12:30 – 13:30	12:30 – 13:30
Networking lunch in the Shannon Conference Suite.	Guided site visit to the depot and vehicle walkaround.
13:30 – 14:30	13:30 – 14:30
Guided site visit to the depot and vehicle walkaround.	Networking lunch in the Shannon Conference Suite.

Zemo 20:Zero

Zemo's 20th Anniversary Conference

A live conference and 20th anniversary celebration uniting government, local authorities, industry, expert stakeholders – and you – to ensure we deliver a sustainable zero emission transport future for all.

- **Date:** 15th June 2023 (Clean Air Day)
- **Time:** 10:30 – 20:00, including a celebratory evening reception.
- **Where:** London City Hall

Please Visit the Zemo webpage for further details at:
[Zemo.org.uk/Zemo20Zero](https://zemo.org.uk/Zemo20Zero)



Exclusive Zemo Member Offer – only £49 per ticket until June 5th!

Upcoming Events

Zemo Working Group Meetings

🔌 **Commercial Vehicle Working Group**

- 14:00 – 16:00, 6th June
- Online via Microsoft Teams

🔌 **Bus and Coach Working Group**

- 11:00 – 13:00, 20th June
- Online via Microsoft Teams

🔌 **Fuels Working Group**

- 14:00 – 17:00, 27th June
- One Birdcage Walk and Online via Microsoft Teams (Hybrid)

Please Visit the Zemo webpage for further details and to register at:
[Zemo.org.uk/news-events](https://zemo.org.uk/news-events)

Industry Events

🔌 **Innovation Zero Congress**

- 24th – 25th May
- Olympia, London

🔌 **Road Transport Expo**

- 28th – 30th June
- NAEC Stoneleigh

🔌 **CENEX Low Carbon Vehicle Show**

- 6th – 7th September
- UTAC Millbrook

🔌 **Coach & Bus UK Show**

- 8th – 9th November
- NEC Birmingham



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Thank you for attending!

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Thank you

Any questions? Please get in touch

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Interested in joining the Partnership?

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