



Ministry of Infrastructure
and Water Management

HGVC in the Netherlands

EETS-track

Frédéric Koeman, Manager EETS involvement

Martin Blokland, Advisor EETS involvement



Program EETS-track

15.00 Introduction

15.10 Building blocks for a viable
EETS Business Case

15.40 How do we expect to realise
our EETS-ambition?

16.10 The way forward

16.15 Questions



Heavy goods vehicle charge EETS-track

Introduction



Scope for today

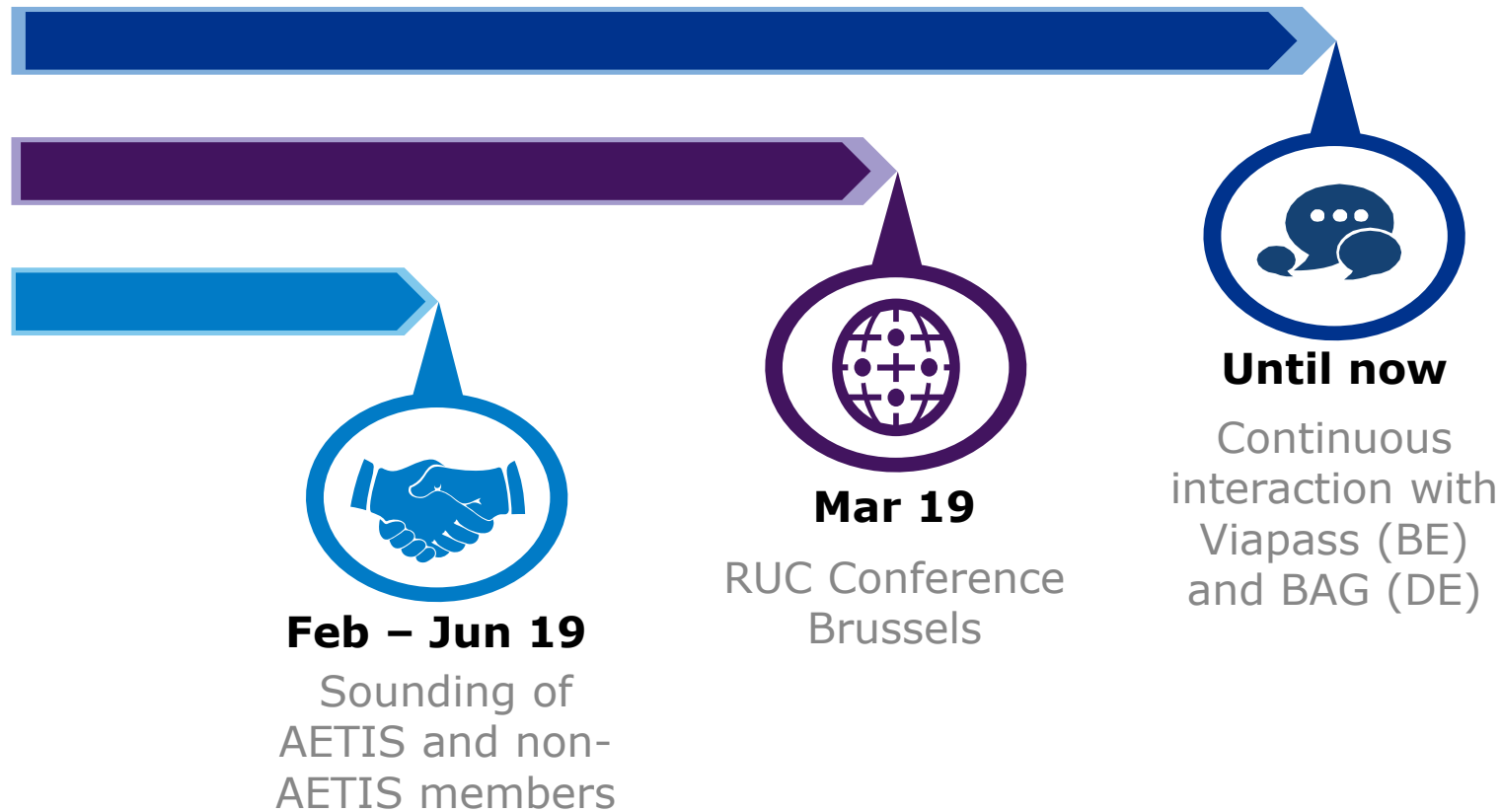
Continuing and renewing interaction by:

- Sharing progress and planning
- Sharing thoughts on EETS in the Netherlands
- Anticipating on further interaction





What have we done since 2017?





What are we doing now?

Currently working on:

- Architecture
- Draft EETS Domain Statement, including:
 - Structure of remuneration
 - Accreditation procedure

We are on schedule!





Coalition Agreement 2017 and policy framework

- No extra equipment
- Use independent private toll service providers as much as possible for the collection
- Possibility to pay in multiple European countries





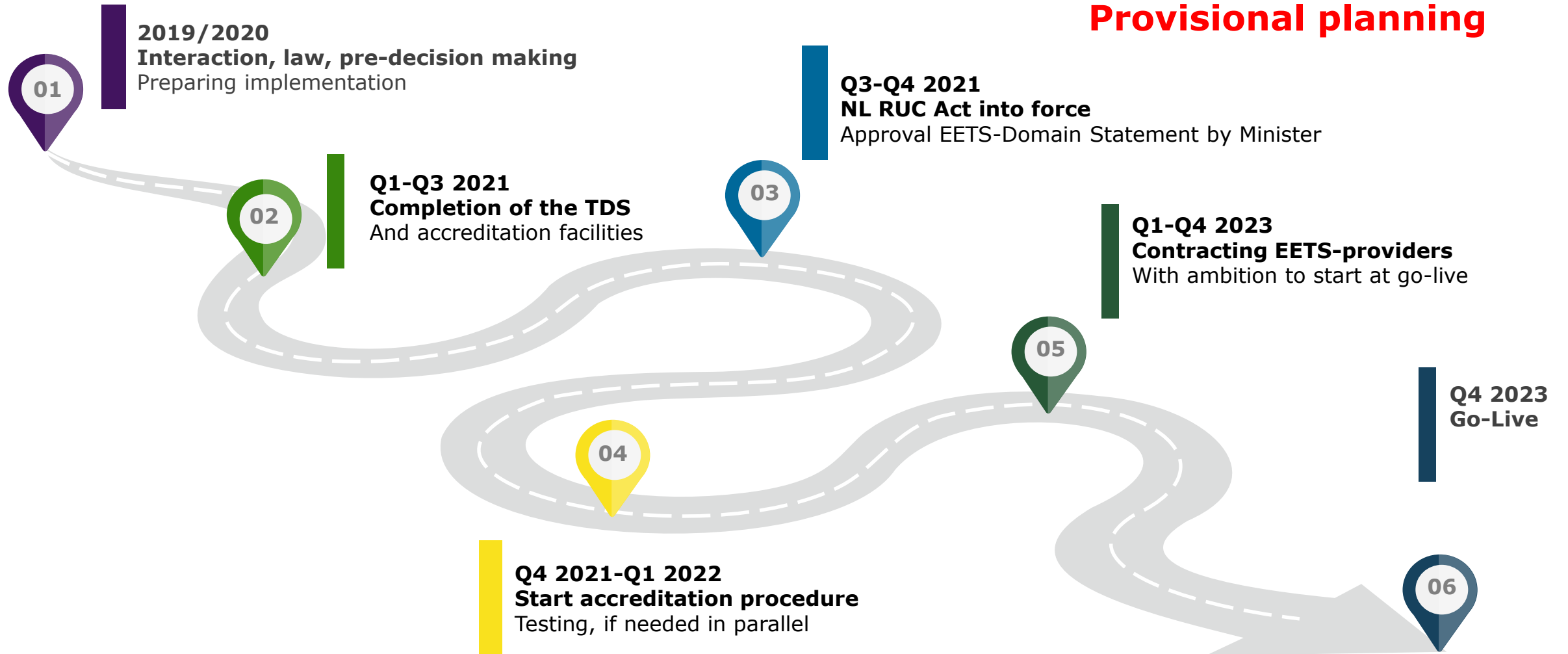
Asks for

- Working together in dialogue to build trust
- Mutual sharing of information
- Facilitating your smooth and early access to the Dutch toll domain





Towards go-live together





Facts & figures

Building blocks for a viable
EETS Business case

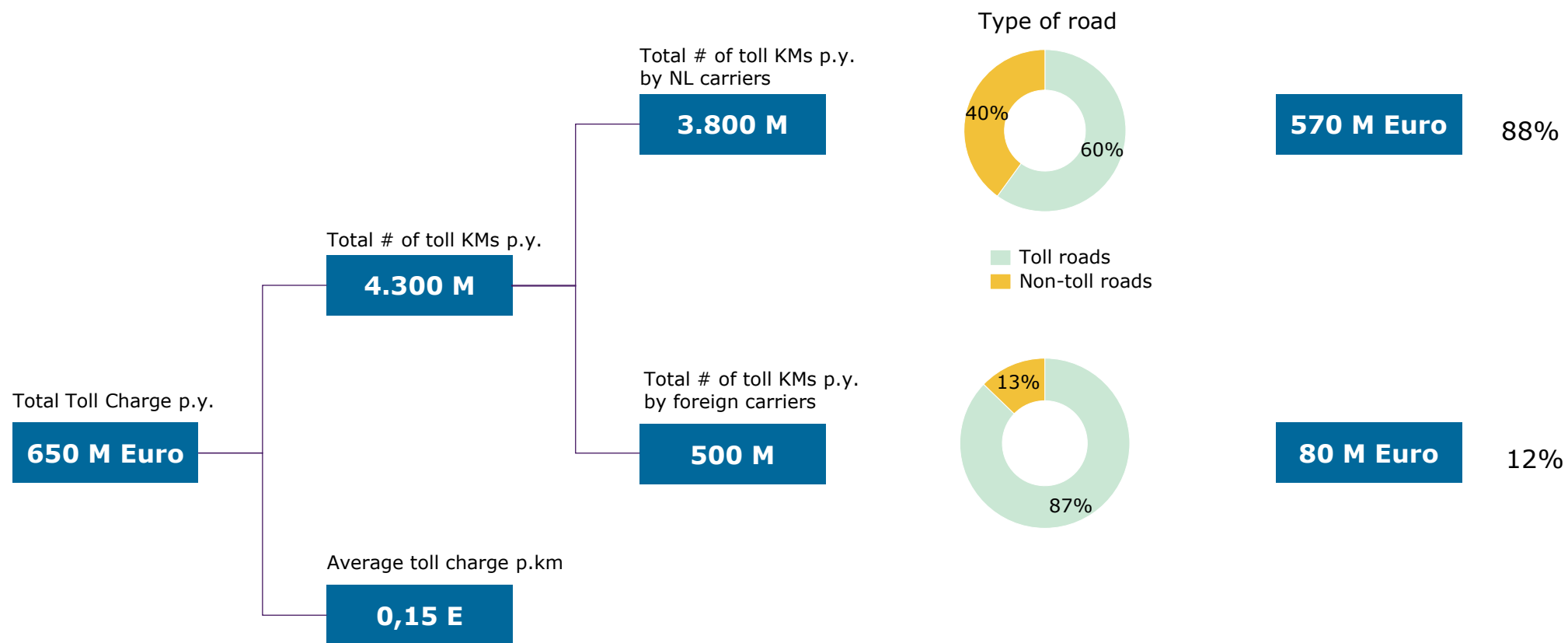


Towards an attractive market proposition

- **International economy:** 400-500 Billion Euro in-& export
- **Geographical position:** largest European (container) port
- **Infrastructure road quality:** rated #3 in world (WEF)
- **Transport volume:** > 1 billion of tonnes (70% road)
- **Market size:** over 500 - 700 M Euro Toll Revenue



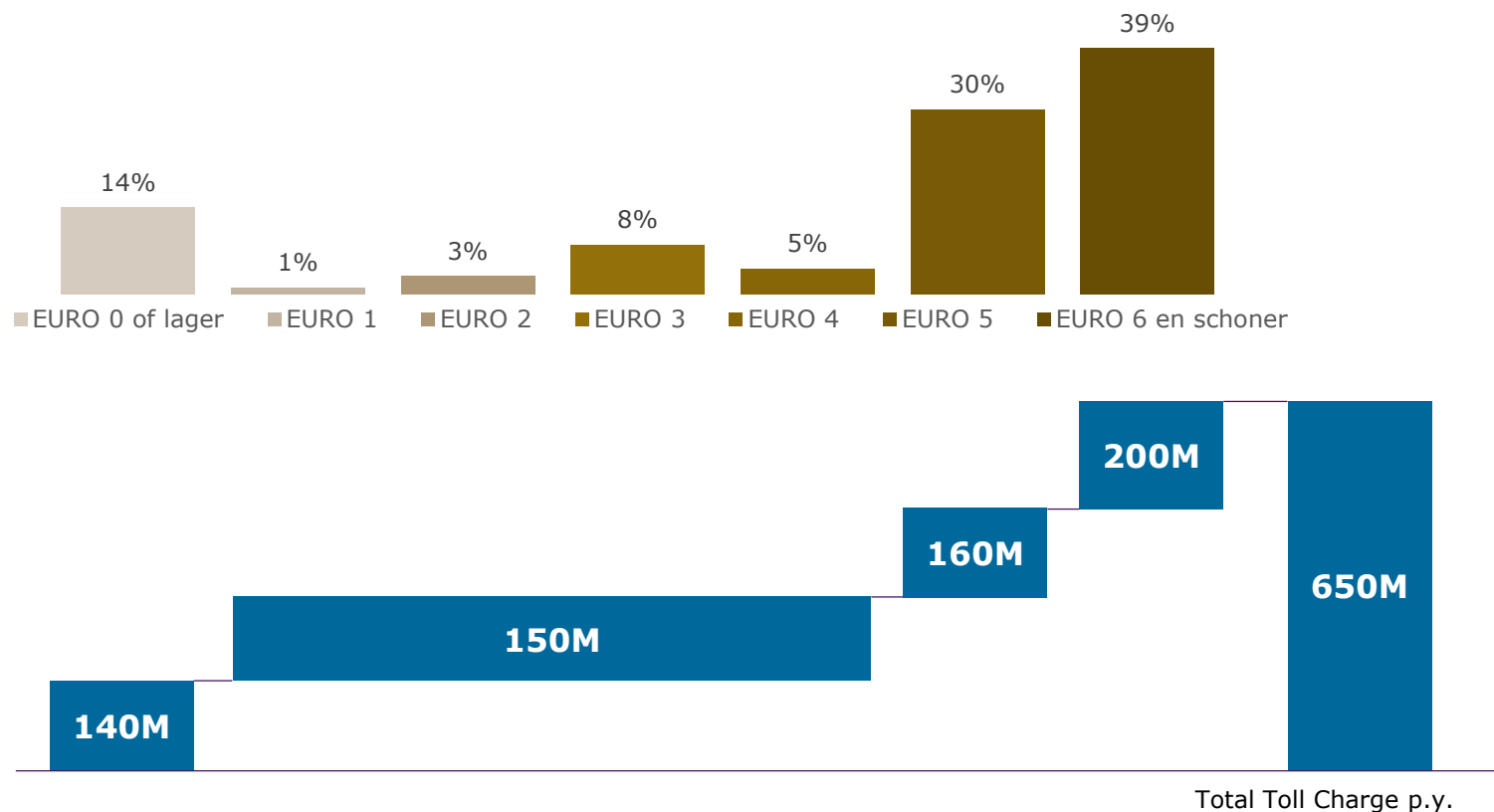
Breakdown yearly toll charge 650 M Euro





Breakdown toll charge per Euro emission class

active HGV per Euro class in NL: total number of 125.000



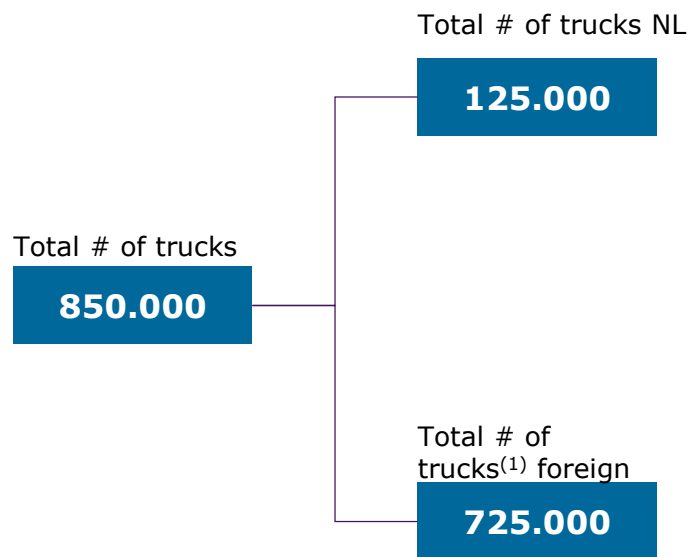
Assume distribution applies to total market,

Leads to distribution of toll charges per emission class

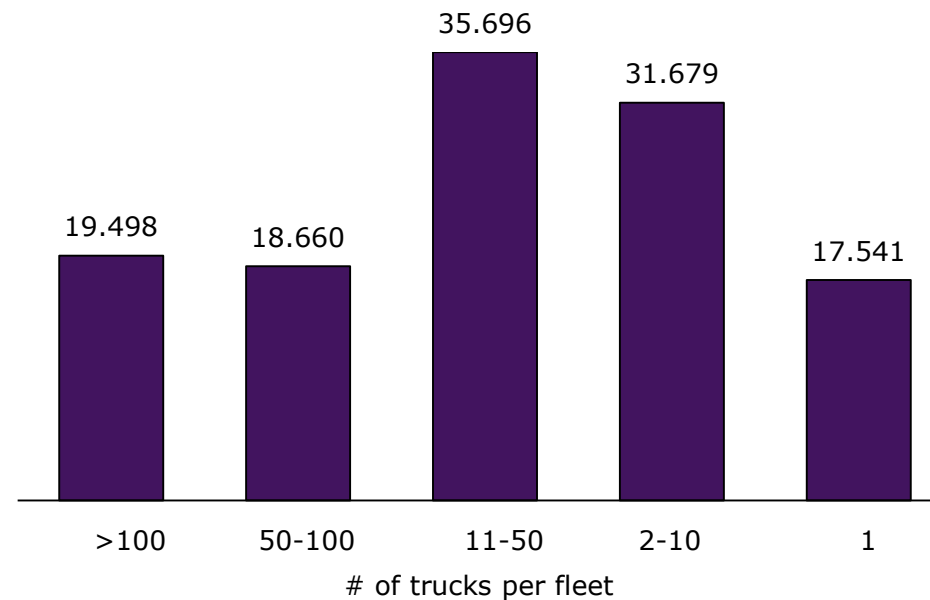


Breakdown of # trucks: indication of # OBE

Key figures – Trucks



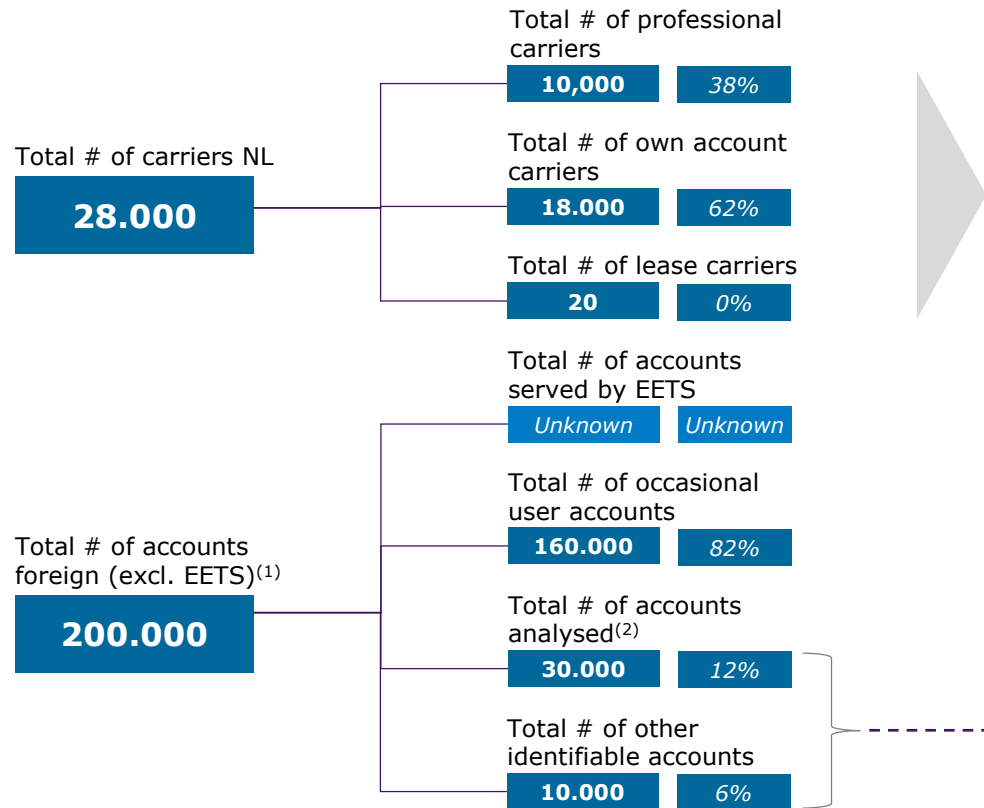
Number of trucks per fleet size segment-NL



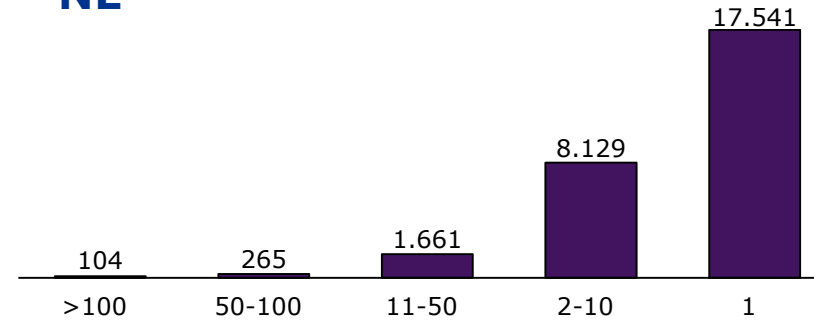


Breakdown of #carriers

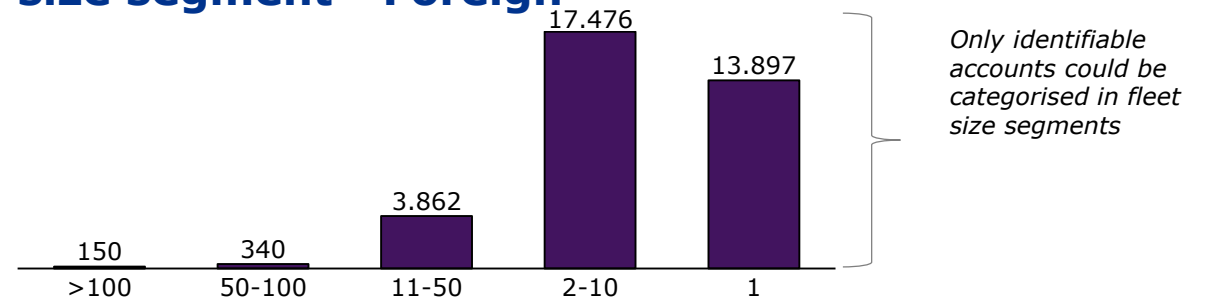
Key figures – Carriers



Distribution of carriers per fleet size segment – NL



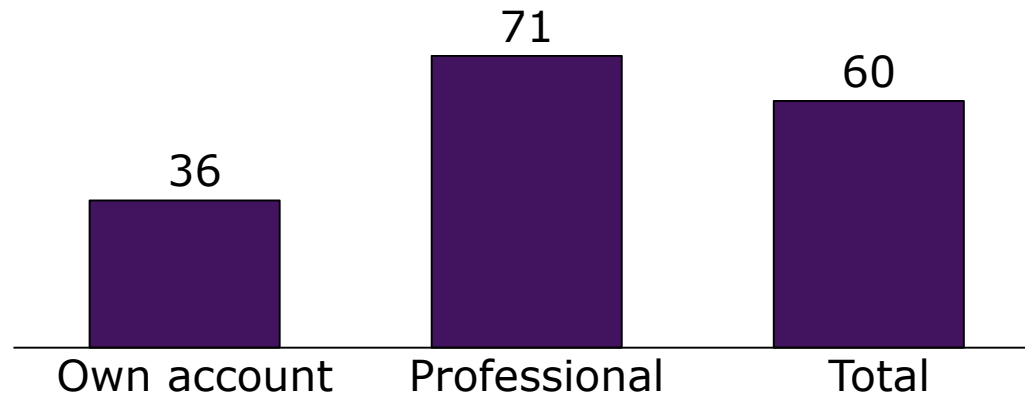
Distribution of identifiable accounts per fleet size segment - Foreign





Mileage in KMs per truck per carrier

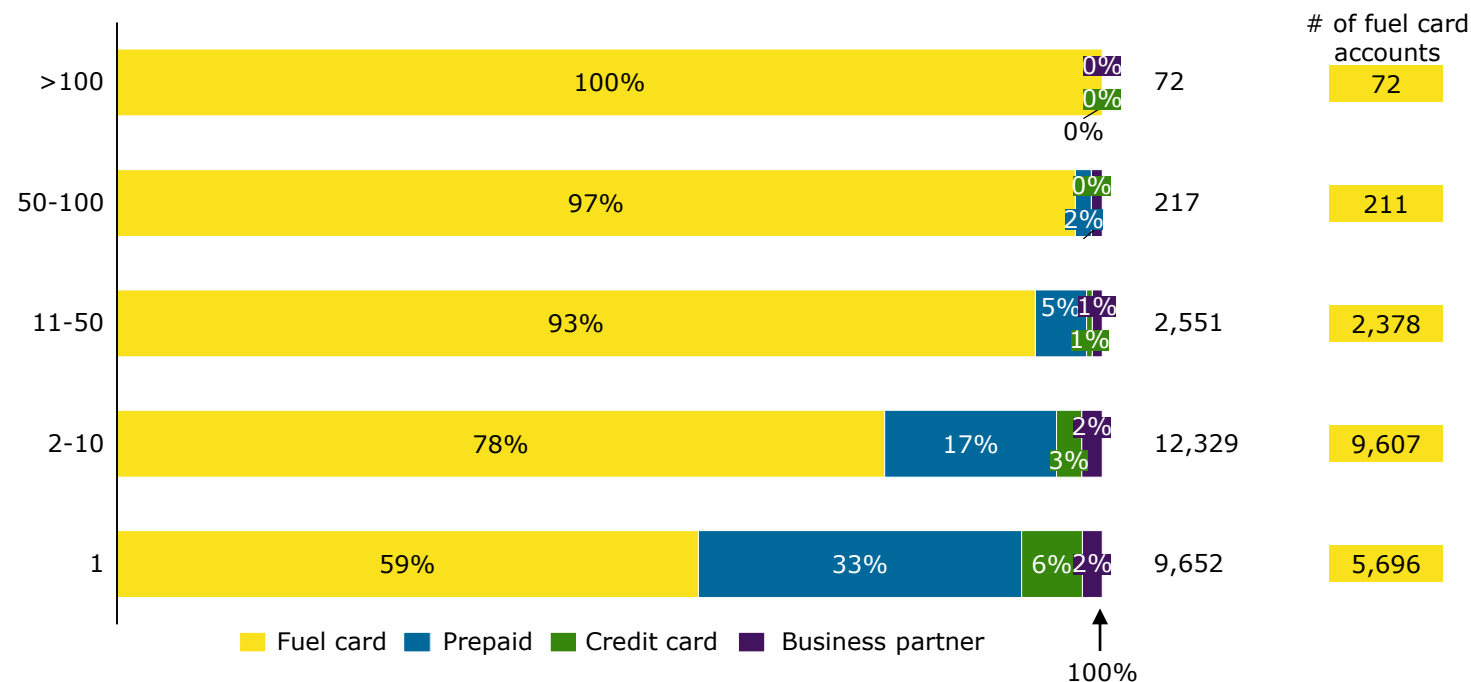
Average annual mileage per truck ('000 KMs) – Dutch trucks per type of carrier, 2018





Dominant position of fuel cards

Share of identifiable accounts⁽¹⁾ per payment method – Foreign carriers (Germany, Poland, Romania) per fleet size segment, 2018

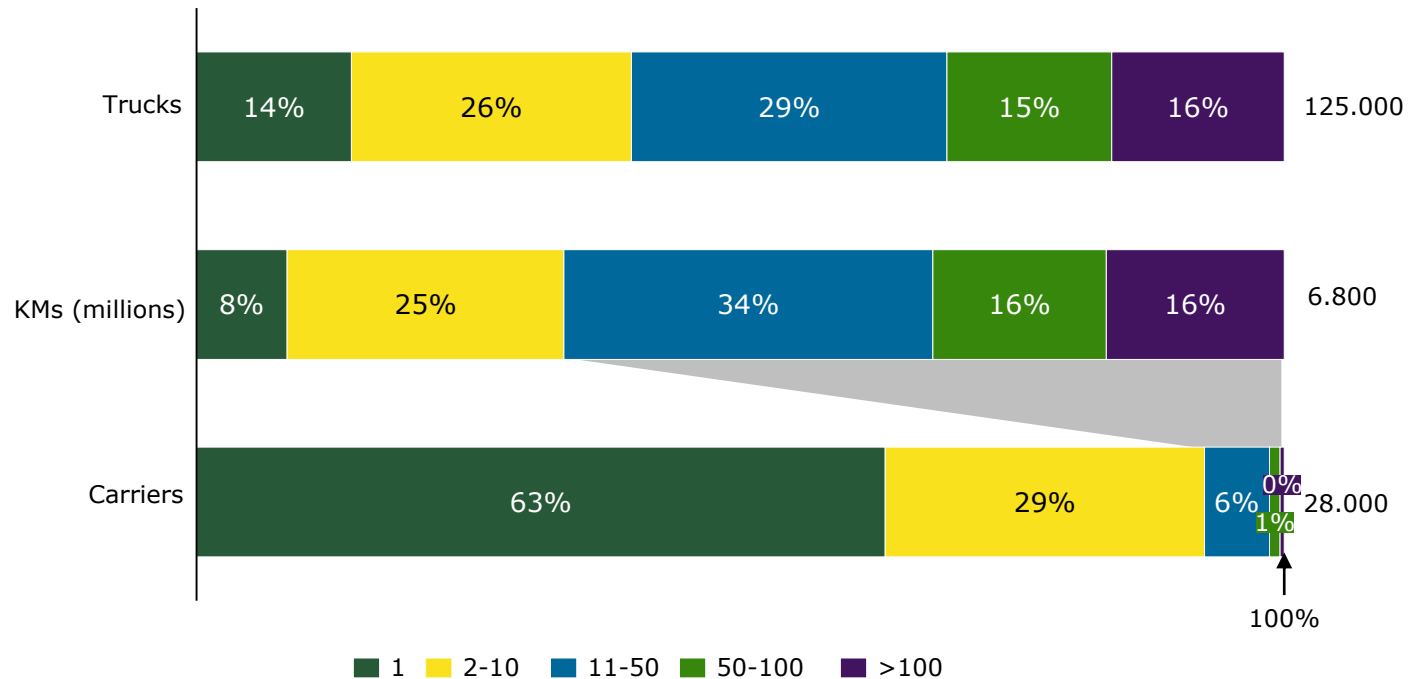


Note: 1 Trucks are OBUs in the Belgian market applied to the Dutch market.
Source: CBS, RDW, NIWO, Data on Belgian OBUs, KPMG



7% of Dutch carriers produce 67% of all Dutch mileage in KMs

% of Dutch trucks, KMs⁽¹⁾ and carriers per fleet size segment, 2018

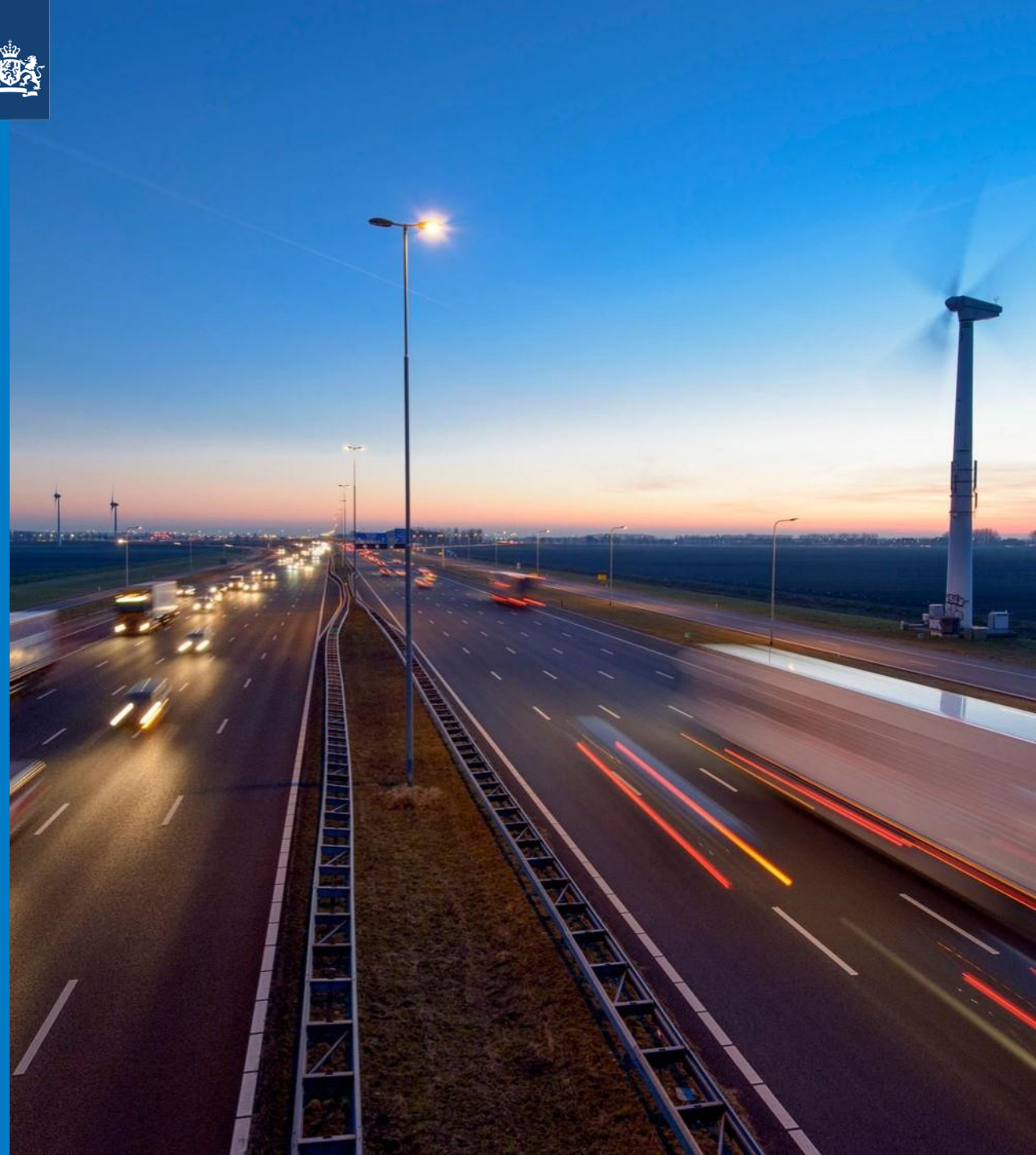


Note: 1 Trucks are OBUs in the Belgian market applied to the Dutch market.
Source: CBS, RDW, NIWO, Data on Belgian OBUs



Facts & figures

**It is your
businesscase**





Heavy goods vehicle charge
EETS-track

How do we expect to
realise our EETS-
ambition?



The way to go

- What you are familiar with
- Supplemented with lessons learned
- Specifics for the Dutch scheme, e.g.;

 - The Main Service Provider
 - Accreditation
 - Remuneration





Main service provider

Coverage of 100% of users by EETS providers at go-live is unrealistic

- Scaling and scoping MSP relates to your 'appetite'

The Dutch MSP will not:

- be responsible for enforcement
- build the TC's back office, enforcement equipment, etc.





Accreditation (1)

Aim to facilitate smooth accreditation of EETS-providers to be ready at go-live

- Parallel testing if needed
- Strive to read across results of verifications (and tests) of other EETS-domains (BE)
- Pilot-phase
 - Getting used/problem solving





Accreditation (2)

Importance of sharing your technical and commercial concepts and realistic ambitions!

- We will be looking at this closely before and after go-live

Information timely before go-live about the number of users you entered into contract with

- We are interested to learn how to make this work

Both will help scaling and scoping the MSP





Remuneration principles

- Fair for you and fair for us
- Ambition is to align with Belgium
 - Variable and fixed components are investigated
 - Revenue drivers investigated: toll quantum and active OBU's
 - Analyses of cost structure EETS-providers
 - Fine and reward system and KPIs are foreseen





Moving forward together





Bilateral meetings

- For those who have signed in
- Opportunity to share your views
- Opportunity to ask additional informative questions
- Joint input will be shared





Next steps

- EETS facilitation Platform (next week)
- RUC Conference Brussels (March 2020)
- Market consultation e.g. MSP
- Further interaction with EETS-market regarding specific topics of EETS domain statement

