

**ASECAP DAYS**



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# **EXPANSION OF FREE-FLOW TOLLING IN CONTINENTAL EUROPE**

**And what's next ?**

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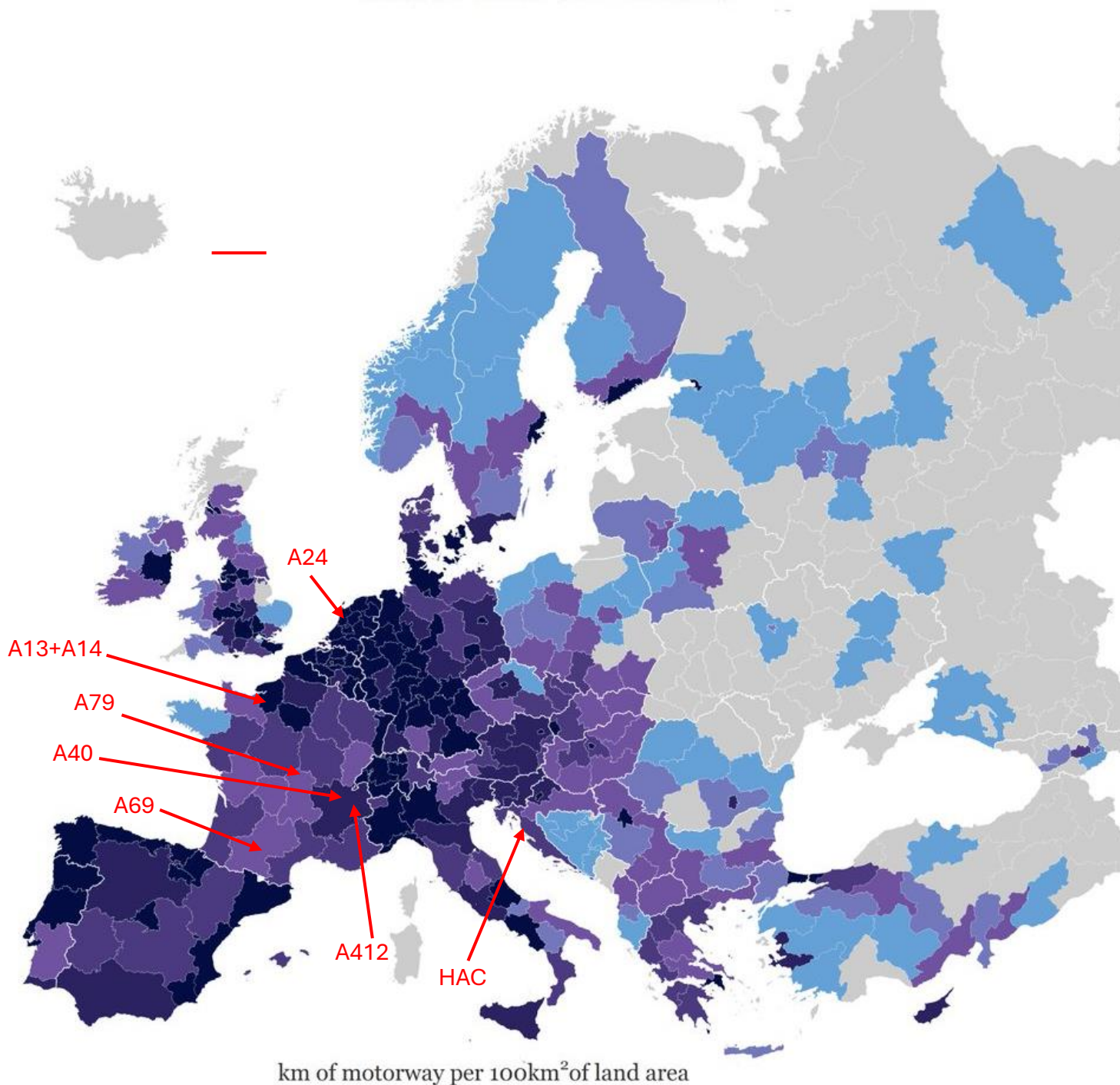
## GLOBAL TREND

Spreading of free-flow tolling across continental Europe:

- > **Conversion** to free-flow
- > **Direct** jump into free-flow (new infrastructures)

## DRIVERS & ENABLERS

- Congested infrastructures
- Physical constraints
- Environmental considerations
- European regulatory framework





## FOCUS ON THE NETHERLANDS

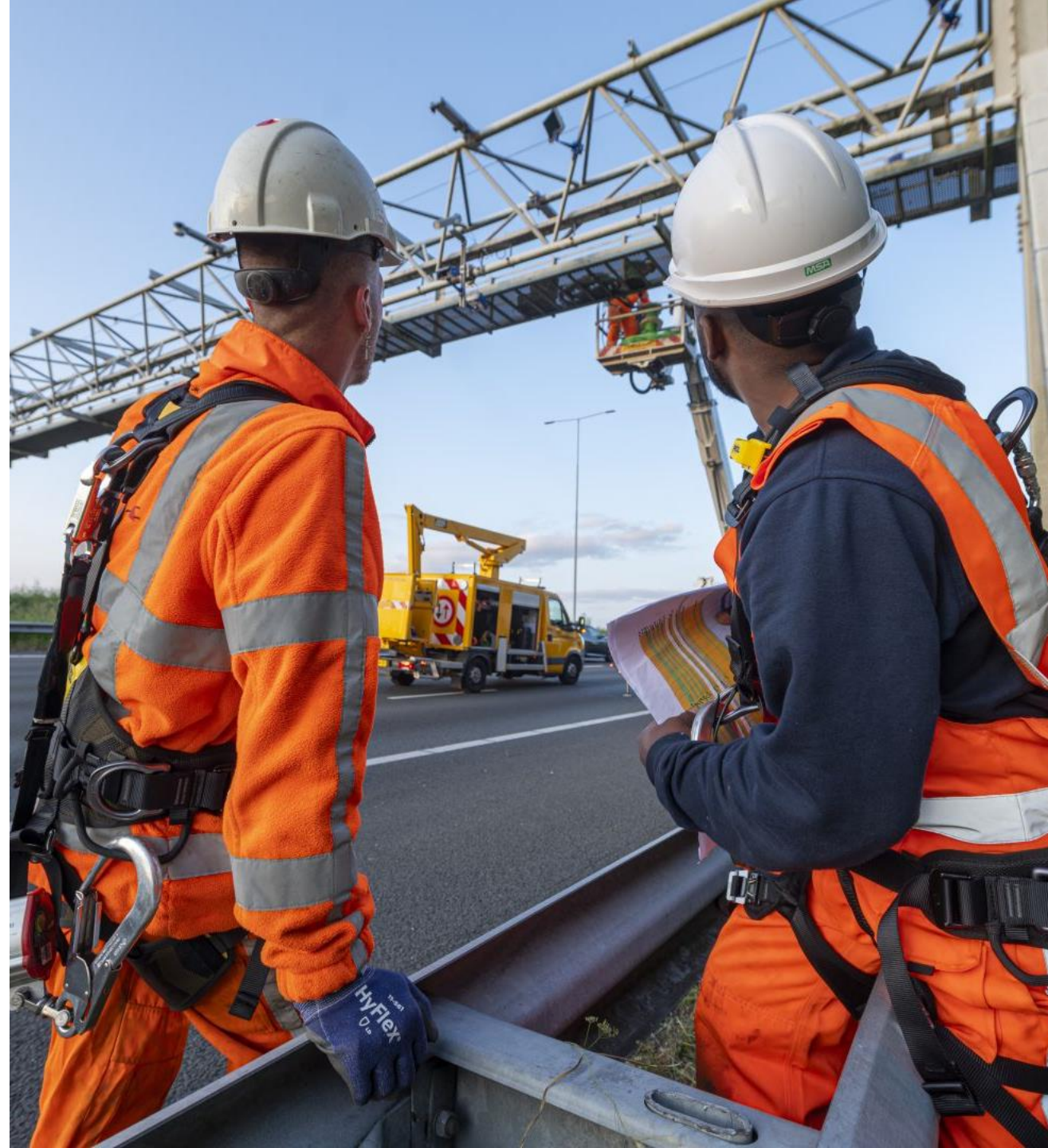
- > Two major new infrastructures
  - Tunnel near Rotterdam [BBV]
  - Bridge [ViA15]
- > 1b€ investment funded through toll
- > Free-flow tolling





## KEY FEATURES

- > Opening : **December 2024**
- > 1 back-office for 2 infrastructures
- > Cloud-based tolling
- > Tolling as a Service contract
- > Multiple Toll Service Providers
  - Toll Charger
  - Main Service Provider
  - ETS & EETS

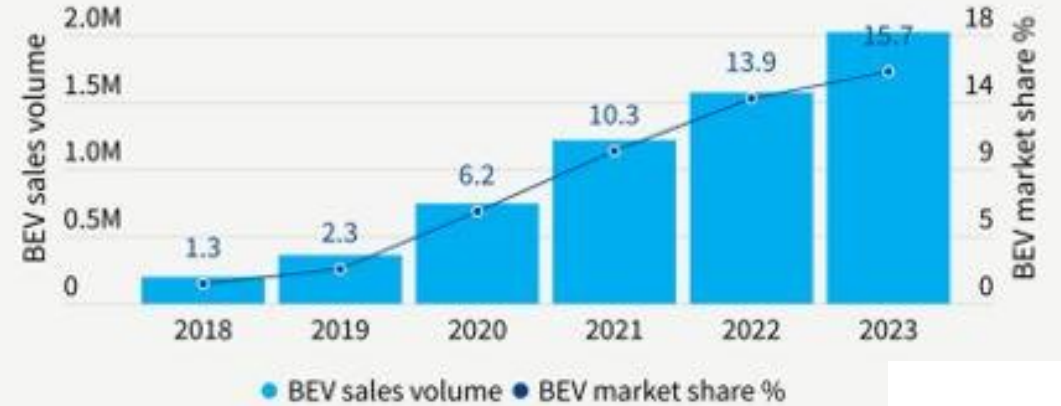


# THE FUTURE OF TOLLING

## Rise of Electrical Vehicles in Europe

- > Market share to reach **60%** by 2030 [HSBC Global Research] in the EU.
- > Fuel-tax revenues dropped by **50%** in the last 15 years in Europe [OECD]
- > Major challenge to EU Treasuries
- > Future of the Pay-Per-Use principle ?

## European BEV sales continue to grow



Scope: EU+EFTA+UK  
Source: ACEA registration data

## Bloomberg

Live TV Markets Economics Industries Tech Politics Businessweek Opinion More

Opinion | Javier Blas, Columnist

### You'll Have to Pay to Use the Highway. Blame EVs.

If governments succeed with their green plans, the fuel tax revenue they rely on will disappear. It's time to devise an alternative system.

29 janvier 2024 at 06:00 UTC+1



# THE FUTURE OF TOLLING

## Rise of Electrical Vehicles in Europe

- > Average car weight is increasing
- > Wear & tear predicted to **x 4!** [McKinsey]
- > How to fund the upkeep of road network ?

Average Curb Weight of the vehicles sold in Europe



McKinsey & Company

## Road wear will increase fourfold by 2050, largely driven by vehicle electrification



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# THANK YOU

**GRAZIE**

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