Netherlands Enterprise Agency

Electric transport in the Netherlands

2018 Highlights

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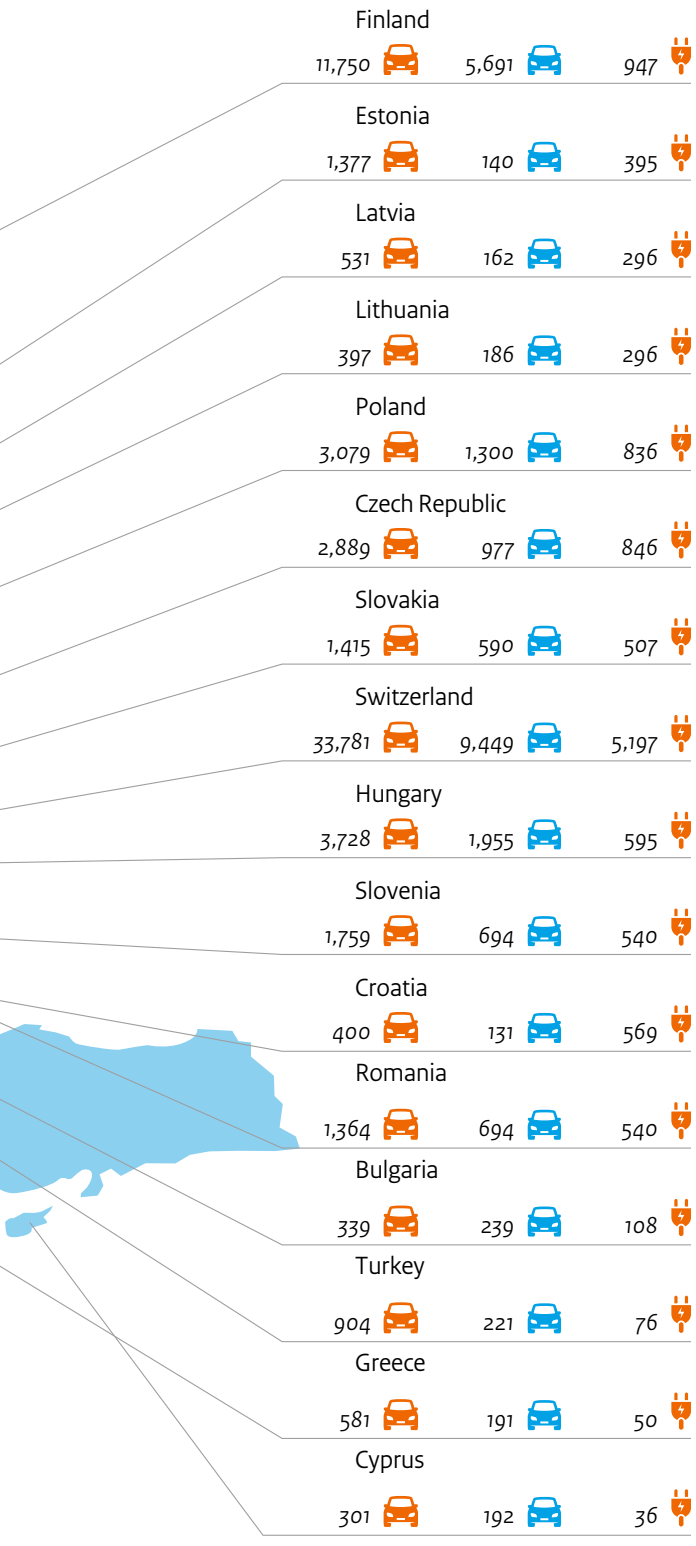
International benchmark: The Netherlands versus Europe

	EV fleet until 2018 inclusive	EV new registrations in 2018	Number of charging points (public, semi-public, normal and fast)
Sweden	78,228	28,674	6,420
Iceland	8,513	3,439	127
Norway	249,043	72,636	12,096
Denmark	15,424	4,756	2,674
The Netherlands	142,686	29,159	37,037
United Kingdom	198,048	60,144	19,076
Belgium	45,422	13,478	3,091
Ireland	5,272	1,962	1,057
Luxembourg	3,212	1,028	841
Germany	193,691	66,282	27,459
Austria	26,667	8,537	4,975
France	165,897	45,545	24,850
Portugal	16,355	8,237	1,596
Italy	23,157	9,785	3,562
Spain	28,702	11,639	5,209
Malta	328	179	100

Source: www.eafo.eu; edited by Netherlands Enterprise Agency

The vehicle numbers for both fleet and sales market percentage are the combined figures for BEVs and PHEVs



2018 Highlights E-mobility is an innovation that offers economic opportunities for Dutch businesses. Amongst others, Dutch companies are active in the field of charging infrastructure, charging services, consultancy, the manufacture of electric trucks and buses, the manufacture of components and the manufacture of light electric vehicles. In 2018, a large number of e-mobility related activities took place and significant results were achieved. This annual report contains some of the highlights from 2018. You can find the latest information at https://nederlandelektrisch.nl/gateway-to-europe

Government incentives

Rotterdam: Electric taxis, hire coaches and lorries are allowed to use the 19 dedicated bus lanes. Emission-free delivery vans and lorries will be awarded extended loading and unloading times.

Laadpaalnodig.nl: An initiative launched by Rotterdam and 8 surrounding municipalities for requesting a public street-side charging station. Developed by NKL Nederland for Dutch municipalities to improve cooperation between parties. Electric drivers can use it, for example, to request a public charging station. NKL is the Dutch independent knowledge platform for public charging of electric transport.

Amsterdam: Subsidy scheme for fully electric delivery vans: €5,500 – this in addition to the existing €5,000 subsidy – for entrepreneurs who drive at least three times a week in the city. Subsidies are also available for 100% electric taxis, with a maximum of five taxis per business.

Rijkswaterstaat: This is the first central government body to replace 100 of its diesel vehicles with electric ones. In 2030 the entire fleet must be entirely electric.

Green Deal on Car Sharing: Voluntary agreement involving 40 parties to promote car-sharing. Objective: 100,000 shared cars and 700,000 car-share users by 2021. (https://autodelen.info/greendeal-autodelen)

Innovation and Acceleration Programme for e-mobility (IAP): This comprehensive research and innovation programme has been launched to strengthen the Dutch lead in e-mobility; a Formula E-Team initiative.

General Aviation e-platform for Sustainable Aviation: This is a partnership between organisations in the aviation sector and the Ministry of Infrastructure and Water Management to promote electric aviation. Among its first achievements is the installation of charging points for electric two-seater aircraft at the airports in Breda, Teuge and Hilversum.

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Source: Statistics Netherlands, CBS, the Dutch vehicle licensing authority, RDW, and the charging point information provider, Oplaadpalen.nl; edited by Netherlands Enterprise Agency.

Electric vehicles on the road

2017: **21,115**

2018: **44,984**

2017: **98,217**

2018: **97,702**

Fast-charging points

2017: **755**

2018: **1,083**

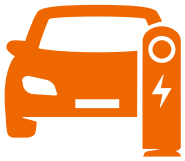
Public and semi-public charging points

2017: **32,875**

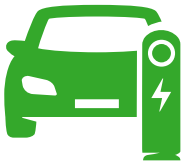
2018: **35,954**

Newly registered BEVs

2017: **8,627**

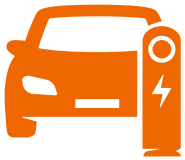


2018: **25,065**

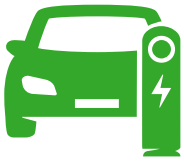


Sales market share in numbers of new registrations

2017: **2.1%**

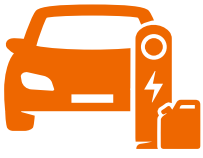


2018: **5.6%**



Newly registered PHEVs

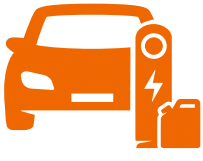
2017: **2,445**



2018: **4,094**

Sales market share in numbers of new registrations

2017: **0.6%**



2018: **0.9%**

BEV = battery electric vehicle | PHEV = plug-in hybrid electric vehicle

Presentation of the major themes of the draft Climate Agreement: Electric transport played a major role with the 2030 target of all new passenger cars being zero-emission. This entails such proposed measures as a purchase subsidy for electric cars for consumers, as well as motor vehicle circulation tax (MRB) and motor vehicle purchase tax (BPM) exemption for zero-emission cars until 2024 inclusive. The mutual aim is to create 1.8 million private and public charging stations by 2030.

National Charging Infrastructure Agenda: This agenda has been drafted under supervision of the Formula E-team and the Ministry of Infrastructure and Water Management. It is informed by the notion that lack of charging infrastructure should not obstruct the introduction of electric transport. Measures included in the agenda are intended to have such consequences as sufficient charging infrastructure coverage, decreased processing times when creating charging stations, and accessible information on charging station locations and fees.

Administrative agreement: The aim of 32 municipalities and the Ministry of Infrastructure and Water Management is for target group transport to be entirely zero-emission by 2025.

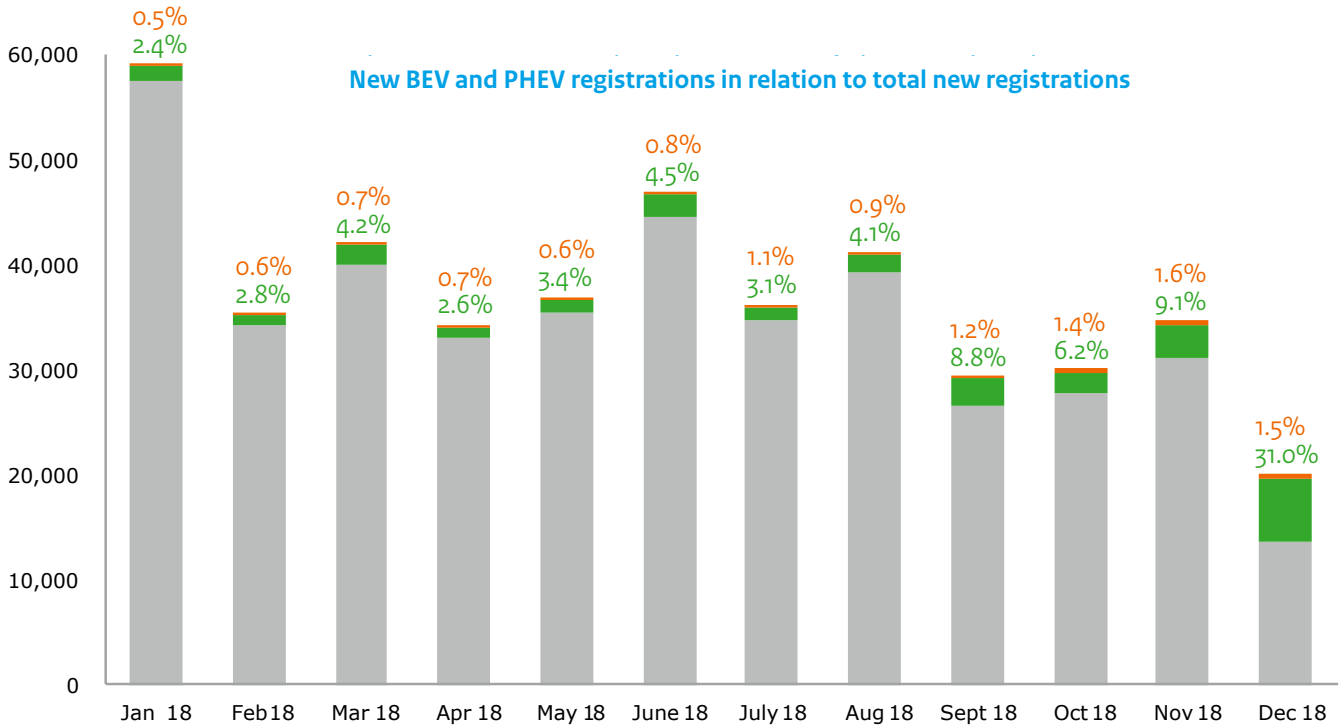
Passenger vehicles

ENGIE: Of the 250 new electric cars which have been purchased, ENGIE has deployed 110. The other vehicles are being delivered in 2019 and 2020. By 2021, the entire fleet will be electric.

200 electric shared cars in 7 cities: This was the direct consequence of the City Deal on shared electric mobility in urban area development. As part of this deal, Amsterdam, The Hague, Rotterdam, Utrecht, Amstelveen, Amersfoort and Apeldoorn will be building 5,000 new homes by 2021 that will accommodate 200 electric car shares, meaning fewer parking spaces and more affordable homes.

Heavy transport & public transport

VDL Groep and DAF Trucks: These two manufacturers have delivered the first entirely electric lorry to the Jumbo super-market chain in Veghel, to make deliveries to 80 supermarkets in the province of North Brabant. This is the first lorry the two businesses have developed together. This initiative received support from the Climate Technologies and Innovations in Transport Demonstration (DKTI) scheme and the Netherlands Enterprise Agency (RVO.nl).



01 2018	02 2018	03 2018	04 2018	05 2018	06 2018	07 2018	08 2018	09 2018	10 2018	11 2018	12 2018
300	223	293	238	247	369	397	379	357	420	562	309
1,415	989	1,762	905	1,249	2,106	1,118	1,683	2,611	1,856	3,169	6,202
57,652	34,198	40,139	33,147	35,456	44,642	34,748	39,293	26,559	27,803	31,054	13,517

PHEVs BEVs All passenger cars, except BEVs, PHEVs and FCEVs.

Source: the Dutch vehicle licensing authority, RDW, edited by Netherlands Enterprise Agency

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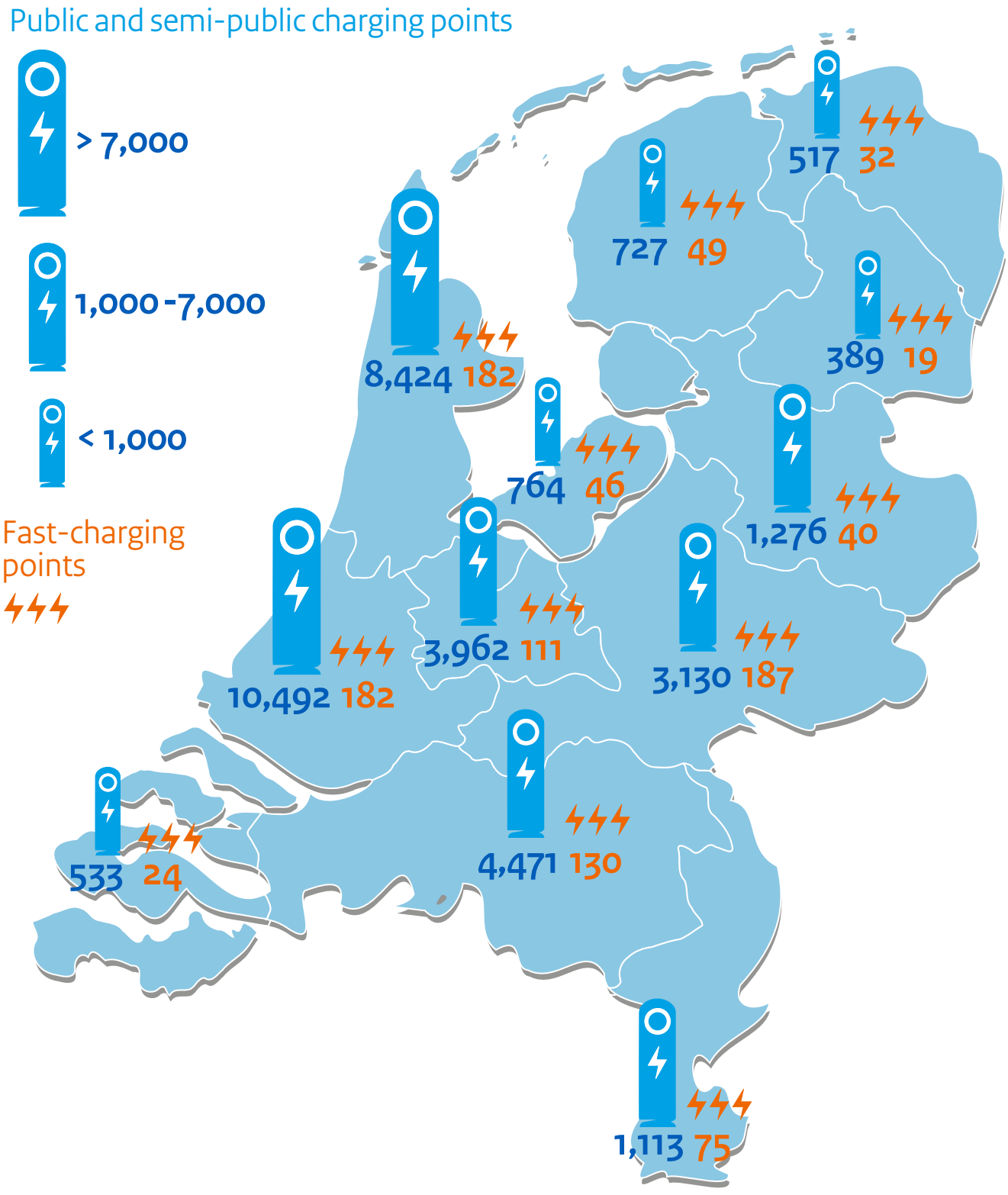

Source: Oplaadpalen.nl; edited by Netherlands Enterprise Agency

City of Groningen: This municipality has introduced two new hydrogen-electric refuse collection vehicles and a hydrogen-electric service vehicle. Groningen intends to be a CO2-neutral municipality by 2035.

Dutch organisations awarded €19.1 million subsidy: The funds came from the European programme for the Trans-European Transport Networks (TEN-T). Connexxion will receive €13.5 million for the construction of 169 charging stations for 220 new electric buses. Port-Liner will receive €5.6 million to build 9 container ships which are entirely electrically powered.

Many provinces and municipalities purchase electric buses: In 2018, many provinces and municipalities planned to purchase electric buses. Groningen and Drenthe signed a contract to see public transport company Qbuzz operate 159 battery-electric buses and 22 hydrogen-electric buses by late 2019.

Bus manufacturer VDL: The orders for electric buses VDL received in 2018 followed in quick succession. In the Netherlands, they received orders from Groningen (10 buses), Rotterdam (55) and Amsterdam (100). With their 100 vehicles, Connexxion, Vervoerregio Amsterdam (a regional public transport body) and Schiphol currently have the largest electric bus fleet in Europe. VDL also exported substantial numbers, including to Norway (40), Osnabrück in Germany (13) and Umeå in Sweden (25).

Charging infrastructure

Number of fast-charging points: In 2018 the total number rose by 328 to 1,083. All McDrives will have a fast-charging station for electric cars. Nuon began installing 168 fast-charging stations with two fast-charging points each. Fastned opened the first fast-charging station for electric cars in Germany along the A3 motorway at Limburg an der Lahn. The Fastned European network comprised 87 fast-charging stations by the end of 2018.

Amsterdam: The city has installed 52 extra fast-charging stations for electric cars as a result of agreements the municipality made with the taxi sector. In 2018, taxi business Taxicentrale Amsterdam added the 100th entirely electric taxi to its fleet.

First charging point as part of the largest European tender: The first of this largest European tender ever for charging points was installed in the municipality of Dalfsen. Ecotap and Allego will be installing a total of 4,500 in 43 municipalities in the provinces of Overijssel and Gelderland.

BENEFIC installing 46 extra fast-charging points and ultrafast-charging points and 2 extra hydrogen stations: By the end of 2020, these will have been realised as part of a European project for the development of charging and filling infrastructure for alternative fuels. In the Netherlands, the Ministry of Infrastructure and Water Management is taking the lead in this project which also involves companies such as Fastned and PitPoint. In addition, Shell has began work on a network of hydrogen filling stations in the Netherlands. By 2020 there should be four Shell stations: two in the Amsterdam region, one in The Hague and another in the province of Drenthe, in Pesse.

Dutch DSOs (Distribution System Operator): By 2023, the DSOs want smart-charging for 1 million cars. They will be investing once again in ElaadNL, the knowledge and innovation centre, to this end. In 2018, ElaadNL opened a new testlab in Arnhem, to be able to test all the various types of charging stations currently in use in the Netherlands. An ElaadNL research project in Amsterdam also showed that smart charging could improve the way the existing power network without having to install expensive extensions or cables.

Leeuwarden: This city is home to the first city centre where PostNL is operating emission-free: all packages sent by PostNL in the city centre of the Frisian capitol are delivered by electric-powered transport. By 2025, PostNL wants to be making emission-free deliveries in 25 city centres as part of the Green Deal Zero Emissie stadslogistiek (zero-emission urban logistics).

Van der Valk Hotel Eindhoven: One of the largest charging plazas in the Netherlands was opened at this location. The plaza has a total of 50 Allego charging stations, offering a combination of smart, regular, fast and ultrafast charging.

NKL Nederland introduces OCPI Management Board: Among its duties, the board will be working on drafting guidelines to ensure the professional development of the Open Charge Point Interface (OCPI)-protocol. It will also work on designing a management organisation. The roll-out of roaming services and international charging will be accelerated.

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