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Market Consultation Report

Table of Contents

1	Introduction	3
1.1	Reasons and context	3
1.2	Aim of the market consultation	3
1.3	How to read this document	3
2	Market consultation findings	4
A.	Aims of the transport concessions	4
B.	Term and commencement date of transport concessions	5
C.	Certainty for island residents	6
D.	Pricing	9
E.	Obligation to take over vessels	12
F.	Improving the sustainability of vessels	13
G.	Ameland fairway	15
H.	Management of operating assets	17
I.	Social return	18
J.	Collaboration strategy	19
K.	Tender strategy	20
L.	Final questions	22
3	Market consultation procedure	23
3.1	Meetings	23
3.2	Actions following the market consultation	23

1 Introduction

1.1 Reasons and context

For Frisian Wadden Island residents and visitors, good accessibility for the Wadden Islands is highly important. Good ferry connections are extremely important for quality of life on the islands. For island residents, the ferry connections between the Frisian Wadden Islands and the mainland are a lifeline: island residents depend on the ferry connections to reach essential mainland services, such as hospitals.

The Ministry of Infrastructure and Water Management (hereinafter: I&W) is responsible for passenger transport between the mainland and the Frisian Wadden Islands. To ensure good ferry connections, two concessions have been granted for this transport: the Western Frisian Wadden Island ferry transport concession (Vlieland and Terschelling), granted to the B.V. Terschellinger Stoomboot Maatschappij of shipping company Doeksen, and the Eastern Frisian Wadden Island ferry transport concession (Ameland and Schiermonnikoog), granted to Wagenborg Passagiersdiensten B.V. These concessions went into effect in April 2014. Both concessions have a term of 15 years and will therefore expire in 2029. I&W has therefore started preparations for the tender of the next concessions.

1.2 Aim of the market consultation

I&W organised a market consultation to prepare for the planned tender procedure for the ferry service concessions to the Western and Eastern Frisian Wadden Islands (*Waddenveren West and Waddenveren Oost*). I&W values the opinion of market parties and therefore endeavours to actively involve them before the start of the tender procedure. I&W will use the results of this market consultation as input for the tender documents wherever relevant and feasible.

1.3 How to read this document

This document contains an anonymised report, in which the findings of the market consultation are summarised. The report is structured as follows. Chapter 2 contains the responses to the questions posed by I&W as part of the market consultation. Chapter 3 describes the process after the market consultation.

2 Market consultation findings

A. Aims of the transport concessions

1. What is your view on the above main aim and subsidiary aims?

As indicated in the NvU, the main aim of the tender procedure for the Eastern and Western Frisian Wadden Island ferry transport concessions is to maintain passenger transport between the Frisian mainland and the Frisian Wadden Islands in such a way as to ensure that these links are adequate for island residents and other travellers. This main aim is based on four subsidiary aims.

- Reliable, frequent and permanent: The continuity of the ferry service will be safeguarded and the ferry service will be run punctually according to a 'minimum service timetable'.
- Future-proof: The ferry services will at least meet the standards for sustainability and nature and be prepared for the dynamic nature of the Wadden Sea.
- Pleasant travel experience: Passengers will travel in sufficient comfort with an adequate level of services from and to the islands. Travel information will be comprehensive and available, it will be possible to purchase tickets easily and the combination with other modes of transport will be as attractive as possible.
- Affordable and manageable: The ferry services will be affordable for residents and visitors and the service will be coordinated by a reliable, financially healthy carrier. Relations between the contracting authority and concession holder will be well coordinated and local parties will have a say on the running of the ferry services.

For further information about the aims, please see the NvU (see [Kamerbrief 8 oktober 2024](#)).

Summary:

The market parties generally agree with the main aims of the concession. The sustainability aspects are considered important in this regard. The parties do note the tension between future-proofing (meeting environmental and sustainability standards) the ferry services, which will require investments, and keeping the services affordable and manageable. They also suggest adding a fifth objective, "local connections", to do justice to local cultural and environmental values.

B. Term and commencement date of transport concessions

1. What would your advice be concerning the term for the Eastern Frisian Wadden Island ferry transport concession?

In view of the considerable investments and development required to replace the existing fleet (partially and/or in phases), a concession term of 15 years is preferred. However, for the Eastern Frisian Wadden Island ferry transport concession in particular, some uncertainties remain, such as the Multi-Year Programme for Infrastructure, Spatial Planning and Transport (MIRT) study into the long-term accessibility of Ameland and developments with regard to the issues with the fairway (siltation and dredging policy; see part G). For this reason, I&W is considering a shorter concession term of five years (2029-2034) for the Eastern Frisian Wadden Island ferry transport concession, in which case the existing fleet will need to continue to be used until the end of the concession. As soon as there is greater clarity with regard to developments, a longer concession can be granted that is more in line with the future situation.

Summary:

The market parties acknowledge the uncertainties with regard to the Eastern Frisian Wadden Island ferry concession. At the same time, most market parties consider a short-term concession undesirable, because this is financially less attractive and may discourage long-term investments, which could compromise the development of the ferry services. A term of 15 years is considered acceptable, provided there is room for interim modifications of the concession. Some market parties suggest issuing a tender of five years for the concession, with the option of extending the term to 10 years if there is enough certainty. They also note that a five-year term may be acceptable if it is profitable, although this will probably lead to lower service standards.

2. What would your advice be concerning the commencement date for both transport concessions?

The current transport concessions took effect in April 2014 and have a 15-year term, i.e. expiring in principle in April 2029. However, the NvU states that the precise commencement and end date for the new transport concessions is still under consideration. In view of the relatively busy spring and summer period, in terms of passenger numbers, the option is being considered, in consultation with the current concession holders, of starting the new concessions earlier, e.g. in January 2029 or on the date that the public transport service schedules change in December 2028.

Summary:

In light of the relatively busy spring and summer periods, most market parties would prefer to start the concession a bit sooner than April 2029. 1 January was mentioned by some market parties as a suitable starting date for the concessions, as this would coincide with the annual planning cycles. Some market parties noted that passengers like to reserve a place on the ferry service well in advance of the last weekend of the Christmas vacation. So a logical starting time for the concession would be after the end of the Christmas vacation. In closing, it was also noted that an implementation period of two years may be (too) short for the proper evaluation and organisation of tasks like the transfer of personnel, vessels and infrastructure (on the island and the mainland).

C. Certainty for island residents

1. What is your view on the principle that car spaces must remain reserved for island residents until a certain time?

Within the relevant legislation and regulations, the concession holder will need to increase the chance of island residents obtaining a ticket to travel on busy days. As described in the NvU, I&W aims to achieve this by requiring a number of places for cars to remain reserved for island residents until a set time before the departure. This will involve creating a balance with the financial conditions for the concession. It also needs to be operationally achievable.

Summary:

Most market parties support the view that car spaces must be reserved for island residents until a certain time. However, they emphasise that such a regulation would have to be fair and efficient. They also suggest that the rule should only apply to island residents who need to go to the mainland unexpectedly and were unable to book in advance. Some market parties also suggest using a waiting list, where a vacated car space would be assigned automatically to an island resident on the waiting list. This is considered a good (partial) solution.

2. In your view, what would be a suitable number of reserved car spaces for island residents?

Summary:

Most market parties stress the importance of a balanced distribution between reserved and non-reserved spaces, noting that this should take into account the specific characteristics of the different islands. They note that the PvE [Schedule of Requirements] should take advantage of the expertise of market parties in the development of a suitable system. They also suggest using a fixed percentage and a fixed number of reserved spaces on the first departure to the mainland and the last departure to the island. These spaces can be booked by tourists and island residents alike. They also suggest introducing an "emergency rule" for island residents for situations where the ferry is completely booked.

3. What operational challenges do you envisage in keeping car spaces available for island residents and reserving these for them and how could they be resolved?

Summary:

Market parties note that it is technically possible to reserve car spaces for island residents. However, they caution that too many empty spaces may lead to lost income. They suggest making the reserved spaces available to island visitors as well, as there may be times when they have to make an unexpected trip to the mainland as well. The importance of using historical data to discover typical demand patterns was stressed as well.

4. What is your view on the principle that passenger places on express services must remain reserved for island residents until a certain time?

Similar questions apply specifically for express services to the Frisian Wadden Islands, but this relates to the number of passenger places that must be reserved for island residents up to a certain time before departure.

Summary:

In general, market parties support the view that passenger spaces should be reserved for island residents on express services as well. At the same time, they emphasise that the rule must be fair and should not lead to empty spaces, as this could lead to lost income. So they emphasise that the PvE should take advantage of the expertise of market parties. They also note that the reserved spaces should be made available to island visitors at a certain point. In closing, they suggest considering reserving spaces for island residents on the regular services as well.

5. In your view, what would be a suitable number of reserved passenger places for island residents?

Summary:

The market parties emphasise that reserved spaces should not lead to inefficiency. They note that it is important to analyse historical data to identify peak patterns. The market parties suggest working with a fixed percentage, but to keep a fixed number of spaces available as well. These spaces could be booked by island residents as well as visitors.

6. What operational challenges do you envisage in keeping passenger places available for island residents and reserving these for them and how could these challenges be resolved?

Summary:

In general, the market parties do not think that reserving passenger spaces will lead to operational challenges. The main challenge is determining the right number of spaces, as empty spaces lead to inefficiency.

7. What is your view on the principle that places for goods transport must remain reserved until a certain time?

The Maritime Cabotage Regulation, which (together with the Public Service Obligation Regulation) will be applied to the next transport concessions, makes it possible to include provisions in the concessions about goods transport without the concession holder gaining the exclusive right to goods transport. In view of the role currently played by the ferry services in the supply of cargo such as groceries and food, a provision will be included in the new transport concessions that obliges concession holders to reserve a set number of places for goods transport until a set time before departure.

Summary:

Most market parties acknowledge the importance of guaranteed freight transport to the islands. Since trucks take up a lot more space on the car deck, a careful approach is required which takes into account the specific characteristics of the islands. A few market parties suggest designating a separate lane for trucks, which could be opened up to passenger cars on a waiting list if spaces are not used. An

option would be to reserve a lane for trucks on the “quieter” early ferry services. Another option would be to include the guarantee for freight transport in the award criteria rather than the PvE. In closing, the market parties emphasise that the freight transport must continue to function as a free market.

8. In your view, what would be a suitable number of reserved places for goods transport?

Summary:

The points mentioned by the market parties in question C7 are reiterated here. The market parties also suggest using a permanent designation every year, with specific times reserved for freight transport. Truck drivers would pay in advance. The market parties also suggest introducing an “exception rule” for cases where a truck is delayed, so transport to the islands is not disrupted. Another suggestion is to work with a fixed percentage.

9. What operational challenges do you envisage in keeping places available for goods transport and how could they be resolved?

Summary:

In general, the market parties do not foresee major operational challenges. However, they reiterate that an excess number of unused spaces will lead to inefficiency and lost income.

D. Pricing

1. What is your view on reducing the number of prescribed price categories?

The current transport concessions includes a long list of price categories applied by the concession holders (see [Vervoerconcessie Waddenveren West](#) and [Vervoerconcessie Waddenveren Oost](#)). This means that if the concession holder wishes to introduce a new price category or no longer wishes to offer a price category, this will constitute a change to the transport concession. For this reason, the option is being considered of only including core price categories in the transport concession that reflect the public role played by the ferry services for island residents and visitors, such as prices for an adult, a car and a bicycle.

Summary:

In general, market parties are positive about the proposal to reduce the number of different prescribed price categories. However, they emphasise that market parties must remain free to introduce alternative categories. They note that some market parties would appreciate the opportunity to discuss this issue further during the consultation on the PvE draft. They also point out that the NvU includes the option to use prices and price categories as award criteria, so bidders can offer lower prices and additional price categories compared than those listed in the PvE. However, sustainability ambitions, which require investments on the part of market parties, may have a negative effect on the affordability of the ferry services.

2. Of the existing price categories, which do you consider to be core price categories that must therefore be prescribed in the transport concessions?

Summary:

Most market parties suggest the use of passenger rates, with different prices for children and adults. They note that children up to 4 years old should travel for free. The most common means of transportation, like bikes, motorbikes, cars and campers, should be included in the core price categories. An additional fee should be charged for car deck meters. They also suggest including large luggage and (less common) vehicles like mopeds, cargo bikes and tandems in the core price categories. Another suggestion is to include a special student rate in the core price categories. A truck rate was mentioned as well.

3. In your view, how can the group of “island residents” be best defined? In other words, what criterion/which criteria will someone need to meet in order to be eligible for the discount for island residents?

The ferry connection serve as a lifeline for island residents. Often this is the only possibility to reach family, friends and services on the mainland. I&W considers an affordable crossing to be important. For this reason, the NvU states that island residents must be entitled to a discount on the crossing. The PvE will need to define who is eligible for this discount (i.e. what the definition of an island resident is) and how much the discount should be.

Summary:

Most market parties note that in order to qualify for a discount, a passenger must be officially registered at an island address that is used as a permanent residence. The market parties note that the person must live on the island at least six months per year. They also recommend making (seasonal) workers eligible for a discount, on the condition that they can show a work permit. The market parties emphasise that the specific characteristics of the islands need to be studied to cover the most common situations.

Most market parties also note that verification is very important. They suggest the following means of verification: random checks, via an automated verification process in the reservation system, or at every booking at the reservation counter. Another idea is to use monthly or annual passes for island residents, offering residents unlimited travel for a fixed price (for passenger tickets only). Most parties are also of the opinion that students who go to school on the mainland but whose parents live on the island should also be included in this criterion. Verification could be based on registration at the school in question and the parents’ address.

4. What discount on the full price do you believe would be appropriate? Should this be a percentage discount on the full price or a set reduced price that applies for several islands?

Summary:

Most market parties suggest using a percentage discount compared to the full price. The reasons they mention are that this offers more clarity and more flexibility to respond to variations in different connections. They note that future prices for island residents should be related to what is expected from the concession holders in the context of the PvE, such as minimum service schedule, sustainability and other additional services.

5. What is your view on the indexation of ferry service prices based on the national price index for regional public transport?

In the new concession period, I&W aims to be as transparent as possible about the annual price increase. The basic principle is that the annual increase in price should as far as possible reflect increases in costs. In the current transport concessions, the price index is based on several different indicators, i.e. a weighted average of the increase in sector wage costs (65%), the IMOC (price of government consumption, net material; 27.8%) and the fuel costs trend (7.2%). An alternative would be to apply the national price index (*Landelijke tariefindex*, LTI) for regional public transport. The LTI is also based on several indicators, i.e. a weighted average of trend in wages (61.58%), the price of diesel (5.17%), the price of electricity (2.78%), the price of gas (1.63%) and the Consumer Price Index (CPI) (28.85%) with the stated percentages applying to the 2024 LTI and being updated annually.

Summary:

All the market parties advised against using the national price index for regional public transport, because this does not take into account specific costs for ferry services such as fuel and maintenance costs.

6. Do you suggest any other alternative methods for determining the annual price increase in an even more transparent way?

Summary:

Almost all market parties note that a customised index is most suitable, because this reflects relevant cost factors for the specific ferry services (such as fuel and the collective bargaining agreement) and inflation. They note that the indexes for the Eastern and Western Frisian Wadden Island ferries may differ from each other. The market parties also note that the use of more sustainable fuels must be reflected in the prices. It also needs to be guaranteed that the indexation will be applied without delay. To prevent volatile pricing as a result of large fluctuations in fuel prices, the market parties suggest using the average fuel price over three years, for example, or to specify an agreed-upon method in the concession.

Some market parties note that a hybrid index which combines components from the LTI with ferry-specific factors could be used as an alternative to a customised index.

Several market parties note that a revision clause should be included in the PvE, so the price index structure can be revised for example in the event of fleet changes, so the index will continue to reflect the actual situation.

E. Obligation to take over vessels

1. What information about the vessels will you definitely need in order to draw up a good bid and what additional information would also be desirable?

The current transport concessions include a provision requiring the vessels to be taken over from the current concession holders. This therefore means that the new concession holders will also be required to take over these vessels.

Summary:

Standard data that are usually provided at the transfer of a vessel are considered essential by the market parties. A distinction can be made between necessary and desired data. Necessary data include in any case the technical specifications, proof of regulatory compliance, financial data, legal aspects and insurance. This also includes the dock where the vessel was built, the delivery date, a class certificate with expiration date, last maintenance service, inspection of the hull, propulsion of the ship and last motor inspection. Desired information includes data on personnel, operational performance and fuel efficiency. The market parties note that assessing the market value of a vessel is complicated, because Wadden Sea vessels are often modified specifically to the circumstances of the Wadden Sea.

F. Improving the sustainability of vessels

1. What is your view on the reduction pathway indicated? What operational challenges do you envisage in achieving this reduction pathway?

In the NvU, I&W has outlined its intention for the new concessions to require at least a minimum percentage reduction in emissions, which will increase over the course of the years. This indicates the potential (excessively) ambitious reduction pathway that might be considered:

- At the start of the concession, in 2029, a minimum reduction of around 55% in greenhouse gas emissions;
- Midway through the term of the concession, in around 2036-2037 (also taking account of the time required to build the electric charging infrastructure), a minimum reduction of around 70% in greenhouse gas emissions;
- At the end of the term of the concession, in 2044, a minimum reduction of around 85% in greenhouse gas emissions, on the pathway towards climate-neutral ferry services by 2050.

Summary:

The market parties note that a reduction pathway without electrification is feasible only with the use of biofuels such as HVO or bio-LNG. This will require modification of the vessels, but that is generally considered a simple process. It is advisable to convert to biofuels in stages, however. The market parties also note that the above reduction pathway will be challenging in some ways. For example, it is difficult to set emission targets for the future, because new technologies may be developed. The market parties also note that it is important to pay attention to how the emissions are measured. Most market parties are of the opinion that the total emissions for the entire concession should be calculated to prevent negative side effects. Other options are reporting CO₂ emission per kilometre, per passenger, per operational hour or per nautical mile. The shipping company could also consider publishing these environmental reports to promote transparency. The market parties point out that the realisation of the suggested reduction pathway requires investment in fuel and in the fleet, which will increase the cost of operating the connections. Using 2019 as the reference years also has disadvantages, because fuel in 2019 is a lot cleaner compared to 1990 (the reference year for the reduction of CO₂ emissions) and the service schedules are different as well. This is why the suggestion was made to use a recent service year and calculate the CO₂ emissions for that year on the basis of the fuel specifications for 1990. In closing, the market parties mention the possibility that current technologies (electric, hydrogen, hybrid) may not meet the operational requirements of ferry services. This applies primarily to vessels that also transport cars. Slow regulatory and approval processes may delay implementation as well. Moreover, the transition may cause disruptions in the ferry services.

2. What is your view on battery-electric propulsion being made a requirement if the necessary infrastructure is realised by central government to enable this to happen?

In addition, I&W is considering stipulating in the PvE that it must be possible for new vessels to be converted (at any time) to electric propulsion.

Summary:

All the market parties are positive about battery-electric propulsion being mandatory if the necessary charging infrastructure is realised by central government. The market parties emphasise the importance of the central government specifying a clear timeline, with a hard deadline for the realisation of the charging infrastructure and a functioning power supply. If the final deadline is communicated in a timely manner, the market parties will have enough time to purchase battery-powered vessels or convert existing vessels. Something to keep in mind here is that not all vessels can be converted at the same time, because that would disrupt part of all of the ferry services.

3. What is your view on battery-electric propulsion being made a requirement if it is uncertain whether the infrastructure will be realised?

Summary:

All the market parties emphasise that mandating battery-powered propulsion without a guarantee that the necessary charging infrastructure will be available would be unwise and undesirable, as this would lead to considerable financial and operational risks. According to the market parties, the only correct approach is for the central government to be responsible for the realisation of the charging infrastructure and sufficient network capacity.

4. Is there anything else you would like to share with I&W relating to emission reductions and battery-electric propulsion?

Summary:

A few market parties advise I&W to consider a subsidy for the cost of transition to electric vessels, in part to ensure that the ferry services remain affordable. They also note that the Wadden Sea is a more complex area because its depth is different than in Scandinavia, for example. They also mention that hybrid propulsion or other alternative systems could be a practical interim solution until the infrastructure is complete. I&W is advised to decide as soon as possible that the Wadden ferries have to operate on electricity in the future and to start building the necessary charging infrastructure immediately. They also suggest requiring concession holders to deploy electric vessels as soon as the infrastructure is available. A point for attention with regard to the transition to electric vessels is the price of energy. The market parties suggest lowering the investment costs for the infrastructure by opting for long-term financing in combination with low rates (€/KWh) as long-term compensation for the costs.

G. Ameland fairway

1. In your view, how can the new transport concession deal most effectively with the uncertainties around the ferry link to Ameland without burdening I&W as the contracting authority with all of the risks involved?

Because of the natural dynamism of the Wadden Sea, the fairways are continually subject to change. In recent years the sea bed has risen by several millimetres per year. In order to keep the islands as accessible as possible for ferry boats, the Directorate-General for Public Works and Water Management (*Rijkswaterstaat*, RWS) dredges the fairways on an almost daily basis. In the future concessions, the carriers will be expected to anticipate the natural dynamism of the Wadden Sea and its consequences for the fairways, for example by opting for a transport concept with relatively limited susceptibility to the dynamism of the Wadden Sea and/or one that can respond flexibly to any changes.

The fairway problem particularly affects the Holwert – Ameland ferry link. The challenge here involves reducing the amount of dredging in order to ensure that the impact on nature and environment is minimised. In that context, the Follow-up study on Accessible Ameland 2030 (*Vervolgonderzoek Bereikbaar Ameland*, VBA) investigated two potential solutions: (1) optimisation of the existing ferry dam in Holwert and (2) relocating the ferry dam to Ferwert. Within each main potential solution, different alternatives were developed, including fairways of different dimensions (100%, 80% and 60% diameter) and different types of vessels. Partly based on the results of the VBA 2030, the decision was made to launch the Accessible Ameland MIRT study (*MIRT-Verkenning Bereikbaarheid Ameland*, see [Kamerbrief 14 november 2024](#)). In view of the time it takes to complete an MIRT study, the results will not be known until the transport concession has been granted. The approach being adopted by the Ministry of I&W is to include as much flexibility as possible within the new transport concession to enable parties making bids to take account of the possible results of the MIRT study in their plans.

Summary:

Most market parties emphasise that the concession must offer a certain amount of flexibility, contain a clear procedure and be adaptable in a transparent manner during the concession term, and that responsibilities must be shared. They note that the adaptability of the concession should not only apply to the Eastern Wadden Island ferries, but to the Western Wadden Island ferries as well because that service is subject to uncertainties such as the realisation of charging infrastructure as well. They also suggest issuing a call for tenders for five years, with an option to extend on the basis of the current transport draft, until the results of the MIRT explorations offer more certainty. Another suggestion is to explicitly specify in the PvE what the basic criterion will be with regard to the fairway and for I&W to provide a chart with updated information about the conditions of each fairway. In closing, they note that the fairways must be maintained in good condition. If this is not entirely possible, another option is to modify the timetable or build new vessels that are suitable for smaller fairways.

2. In your view, during the tender procedure what will be the best way for I&W to assess the flexibility of market parties in dealing with these uncertainties?

Summary:

The importance of adaptability of the concession was reiterated. It is stated that the best way for I&W to assess the flexibility of market parties is to request documentation, such as detailed plans on how the market parties will deal with different situations and proof of relevant experience. At the same time, the market parties note that flexibility is not always possible, in particular with regard to fairways and timetables. If a fleet is designed on the basis of specific fairway dimensions, these vessels will not be suitable for different fairway dimensions.

H. Management of operating assets

1. What is your view on the proposed division of the day-to-day management of operating assets?

The new concessions offer the opportunity to reconsider the day-to-day management and maintenance of the ferry ports (concession site). In principle, the current plan is to assign the day-to-day management of the wet operating assets to RWS and the day-to-day management of all dry operating assets to the concession holders. Wet operating assets include:

- Dam walls, quay structures, capping beams;
- Mechanical and electrical equipment;
- Vehicular and pedestrian bridges;
- Cables and pipes, incl. Public utilities, except for the charging stations for battery-powered vessels.

Dry operating assets include:

- Surfacing of waiting area;
- Paving (not including access roads into the concession site, such as the Grandyk);
- Pavement markings;
- Fences;
- Lights on the concession site;
- Other structures on the concession site;
- Benches, flags, signs, lights, cameras, etc.; Waste bins.

Summary:

All the parties agree in principle with the proposal. Almost all the market parties note that the division needs to be described in more specific detail to create more clarity. They also indicate that if concession holders have to pay for investments, it would be useful to include a regulation to provide compensation for those investments at the end of the concession. There should also be sufficient incentives for RWS to keep the fairways in good condition.

2. Do you have any suggestions for optimising the coordination of the maintenance by RWS and the maintenance by the concession holder?

Summary:

All market parties emphasise the importance of good communication between RWS and the concession holder. They suggest meeting twice a year or considering a shared communication platform for planning, tracking, and addressing issues. They also urge I&W to keep communication simple by limiting the number of contact persons, emphasising that cooperation and consultation will be more effective if the parties are held directly accountable. This can be promoted for example through sanctions imposed by the contracting authority on the maintenance party. They also suggest setting up joint maintenance schedules and making detailed agreements that clearly specify responsibilities. In closing, they emphasise that operational security of essential basic services for the ferries, such as the fairway and vehicular and pedestrian bridges, are crucially important and that the central government should offer guarantees with regard to those services.

I. Social return

1. What in your view would be the best way of meeting the social return obligation?

The NvU stipulates that the concession holder must endeavour to make a social contribution to the region by means of a "social return". I&W is looking into concrete ways to incorporate this in the PVE, for example by imposing requirements with regard to hiring people with poor job prospects, organising social activities, or taking social aspects into account when selecting suppliers.

Summary:

Most market parties emphasise the importance of the region in working out the details of the "social return" obligation. They therefore propose giving the concession holder freedom in this regard. Some market parties suggest implementing this requirement through proven regional partnerships and by promoting regional job opportunities, allocating budgets for local community goals, organising community activities and prioritising local businesses. They note that retraining personnel can be a good way to fulfil this obligation that will help solve labour shortages at the same time. With regard to SROI assessment, they note that the "classic" forms, which are based on national performance ladders and general standards, are not a good fit for the specific characteristics of the Wadden Islands. They are also of the opinion that it would be good to include certain solutions in contracts with the concession holders by means of Critical Performance Indicators.

J. Collaboration strategy

1. What is your view on drawing up a collaboration strategy with consumer organisations and local and regional authorities?

I&W is investigating various ways to increase the involvement of consumer organisations and local and regional authorities in the operation of the concessions. The purpose of this is to encourage more intensive collaboration on the transport plans beyond the prescribed occasions for input and recommendations. One option is to make the concession holders responsible for communication with consumer organisations and local and regional authorities. Carriers may be asked to prepare a collaboration strategy as part of their tender bid. In that case, I&W will specify which parties the concession holders will (at a minimum) be required to communicate with, about which topics, and how often. During the concession, I&W will keep an eye on the communication, but it will not impose specific requirements. I&W will be able to redirect the parties as it deems necessary, however.

Summary:

All market parties take a positive view of drawing up a collaboration strategy with consumer organisations and local and regional authorities. A few market parties emphasise that I&W needs to define and safeguard the division of responsibilities and the scope of the input of local and regional authorities and consumer organisations.

K. Tender strategy

1. What is your view on the above tender procedures? In addition, will the choice of tender procedure determine your decision whether or not to participate in the tender?

I&W wants to be able to talk to market parties during the tender procedure about various (development) topics with regard to the two transport concessions. A public procedure with negotiations or a competitive procedure with negotiations appear to be the options that will best meet this need.

- Public procedure with negotiations: Any interested market party may submit an initial bid in this procedure. This is followed by a round of negotiations with these parties, after which the parties submit their final bids.
- Competitive procedure with negotiations: In this procedure, any interested party may submit a request to participate in the tender. Only those parties that are selected by the contracting authority may submit an initial bid, and this is followed by negotiations with one or more of these parties to work towards a final bid.

Both tender procedures offer room through dialogue/negotiation to ensure that the proposed measures/solutions are better aligned with the requirements and preferences of I&W. The purpose of the negotiation round is to improve the quality of the bids. These procedures offer more flexibility than a regular (non-)public tender procedure, because it allows for correction/improvement of the bids. The difference between the two procedures is the separation of the selection and award phase in the competitive procedure with negotiations.

Summary:

Market parties generally take a positive view of both tender procedures (public procedure with negotiation and competitive procedure with negotiation) and they note that the final choice of procedure is not a determining factor in their decision on whether or not to submit a bid.

2. What reasons might make you decide whether or not to participate in the tender?

Since there are no examples of tenders for similar ferry services, (increasing) interest from the market is an important point for attention. I&W is therefore considering measures to make submitting a bid a more attractive proposition for market parties.

Summary:

Market parties are generally of the opinion that attractive terms, a transparent process, and a healthy balance between risks, rights and expected returns are important factors in deciding to participate in the tender. They point out that there needs to be enough room to adjust agreements during the concession term. The market parties also mention the level of uncertainty and the importance of removing these uncertainties and the related financial risks as a reason to participate or not. They also note that a lack of data on market conditions, unclear tender documents and language barriers make participation in the tenders less attractive. With regard to the last issue, it was suggested to provide clear instructions in English on TenderNed at least, and to provide a clear overview of all the documents. A possible translation of tender documents by IenW is appreciated, although market parties indicate that they are capable of handling this themselves if desired.

3. What measures could I&W take to make bidding in the tender more attractive for you?

Summary:

Market parties mention several factors, like direction from I&W by means of Critical Performance Indicators, allowing the concession holder to decide how to implement certain requirements, selecting a manageable reduction pathway, providing an innovation subsidy, including agreements on minimum fairway dimensions, and introducing a "safety net scheme" that would guarantee a minimum return.

L. Final questions

1. Are there any other points of note that you would like to share with regard to the inclusion of stipulations from the NvU in the tender documents?

Summary:

The market parties mentioned the following points for attention:

- The transfer scheme;
- An error in the NvU in the table on the transport demand for the islands Ameland and Schiermonnikoog;
- A clear definition of the term back-up vessels and the sustainability requirements imposed on back-up vessels, with a comment that all vessels are normally deployed for the operation of the service schedule during the high season.
- The impact of different widths and depths of the fairways on the vessels and operations;
- The impact of a revised mobility policy on the islands;
- The principle of budget neutrality in relation to certain elements that will increase costs, as is clear from the NvU;
- The cost of leasing mainland infrastructure;
- The dialogue about sustainability should include themes like frequency and travel speed, as well as clarity about who is responsible for the realisation of the charging infrastructure;
- Standards for arrival times in relation to safety;
- Being required to operate in virtually all weather conditions should not lead to unsafe practices;
- Standards for the duration of the crossing in relation to sustainability (slower speeds result in significantly lower CO₂ emissions);
- The ISM certification of the vessels, not the businesses as stated in the NvU;
- The tourist tax and definition of the responsibility of the shipping company in the PvE;
- Don't start the tender process right before or during the summer vacation in the Northern region;
- Requirements with regard to (fire) safety, which must be required by law as well.

2. Do you have any other ideas, suggestions or comments or do you envisage further risks or challenges for I&W with regard to the planned tender?

Summary:

Most market parties did not have any additional comments other than those mentioned above.

3 Market consultation procedure

The procedure for this market consultation consists of the following steps

Activity	Date and time
Publication of MCD	28 November 2024
Final deadline for asking questions	13 December 2024
Deadline for publication of Information Notice (<i>Nota van inlichtingen</i>)	20 December 2024
Final deadline for submitting the MID	17 January 2025
Date of possible explanatory meetings	13 February – 11 April 2025
End of procedure	30 April 2025

3.1 Meetings

I&W invited the market parties for individual meetings. These meetings took place from 13 February to 11 April.

3.2 Actions following the market consultation

I&W prepared this anonymised report, which provides a summary of the findings. Confidential business information from participating market parties will not be published, unless I&W is required to do so pursuant to laws or regulations or a court ruling.

After this market consultation, I&W will continue with the preparations for the tender for the Eastern And Western Wadden Island ferry concessions. The findings of the market consultation provide input for the Schedule of Requirements draft and the other tender documents. I&W will organise another market consultation in the context of the publication of the Schedule of Requirements draft. The following is an outline of the schedule for the tender procedure.

Activity	Date
Second market consultation	19 May – 14 July 2025
Publication of tender documents	Q4 2025
Submission of initial bid	Q2 2026

Submission of final bid	Q3 2026
Award	Q4 2026