



Market Consultation Summary: Concession for a collective transport system for the Port of Rotterdam

Contracting authority: Stichting Zuid-Holland Bereikbaar

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Chapter 1 Introduction

1.1 Restatement of the purpose of the market consultation

The following objectives were set prior to this market consultation:

- to validate whether the collective transport system is financially feasible;
- to gain insight into available solutions in the market;
- to gain insight into operational risks and mitigating measures;
- to prevent the tender from including unrealistic requirements.
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1.2 Market consultation process

On 3 June 2026, the market consultation document, including its annexes, was published on TenderNed. Seven responses were received. Individual meetings were held with six parties on 2, 8 and 9 July. The next steps in the project are set out in Chapter 3.

Chapter 2 Summary and conclusions

All responses and individual sessions have been anonymised and summarised. Confidential business information and competition-sensitive information have not been included.

2.1 Summary of responses received

General impression

The consulted parties support the ambition to establish a financially sustainable, scalable and future-proof transport system. They emphasise the importance of improving access to work locations, reducing dependence on individual car use, supporting sustainability objectives and increasing the attractiveness of the labour market in the port area.

It is recommended to offer a range of transport options. Many parties see added value in cooperation between different types of market parties in order to realise a comprehensive offer. A clear division of roles and governance structure are essential for the successful operation of the system.

Critical mass and employers

The parties emphasise that a phased implementation is recommended. A critical mass is needed to build sufficient use and reliable service provision. Almost all parties also stress the role of employers. Active employer involvement is widely regarded as a prerequisite for a sustainable system, particularly for user recruitment, behavioural change, communication, financial contribution and securing stable transport demand.

Funding

The parties mainly indicate that a future-proof system should be funded through a combination of user contributions, employer contributions and public contributions. Achieving full financial self-sufficiency takes time and strongly depends on scale, usage and occupancy rates. According to the parties, relying solely on passenger contributions is in principle not sufficient to guarantee sustainable operation.

User-friendliness

It is emphasised that user-friendliness and seamless integration with existing mobility services are important points of attention. From the traveller's perspective, one digital platform is preferable to separate systems. The various mobility solutions must complement one another in order to meet different travel needs.

Sustainability and innovation

For vanpooling, the importance of electric vehicles is emphasised. Attention is also drawn to the availability of charging infrastructure, as this is crucial for the deployment of electric vehicles. Several parties share the vision of autonomous vehicles. This will not be feasible in the short term, but the data from the potential collective transport system could be used to develop smart routes for autonomous vehicles. The market also expresses a strong need for flexibility in the tender, so that the system can easily incorporate future innovations without requiring an entirely new tender procedure.

Risks and points of attention

According to the market parties, Zuid-Holland Bereikbaar should take several risks and points of attention into account in the tender. These mainly concern compliance with laws and regulations, privacy and data protection, tax aspects of mobility allowances, allocation of liability, and ownership, exchange and use of data. With regard to KPIs, the parties consider it important that KPIs are linked to factors that the implementing party can influence.

Success factors

According to the consulted parties, the most important success factors are active employer involvement, a phased and data-driven rollout, an integrated traveller experience, strong cooperation between public and private parties, a robust financial model with shared responsibility, sufficient flexibility to incorporate future developments and innovations, and achieving critical mass in each sub-area before recruitment and rollout take place in the next sub-area.

Conclusion

The market supports the ambition to establish a sustainable and scalable collective transport system for the Port of Rotterdam. Respondents see the greatest chance of success in an integrated mobility solution, supported by digital services, strong employer involvement, phased growth and cooperation between multiple parties. At the same time, they draw attention to financial feasibility, legal frameworks, data management and a clear governance structure.

2.2 Summary of individual meetings

Constructive discussions were held with the consulted parties. Similar themes emerged during the meetings. Some concerns were also raised about the feasibility of the proposed approach. Several parties indicated that employer involvement is essential and that the characteristics of employees in the port area should be taken into account. The financial position and working conditions of this target group differ from those in other business parks, as does the need for collective transport. For both carpooling and vanpooling, the presence of larger companies with their own premises should also be considered, as this may make shared travel between employees of different companies more challenging.

The importance of financial incentives was also emphasised. Such incentives are important for retaining users on a platform and encouraging continued use of collective transport. Critical mass can only be achieved if users actively use the collective transport platform, where their trips are visible to other users. Rewards for shared travel should therefore be provided exclusively, or as far as possible, through the platform.

Furthermore, several parties considered the available budget insufficient for the intended collective transport solution. The stated budget and contribution appear to be relatively limited in relation to the successful implementation of the system.

Finally, the user experience is also important. If users have poor experiences, they quickly drop out and are unlikely to try the system again.

Chapter 3 Next steps

3.1 Market consultation

Following this market consultation, and in preparation for the anticipated tender procedure, the project team has determined that the next step will be to organise a session with employers from the Port of Rotterdam. The aim is to identify employer needs, so that the transport system can be aligned as closely as possible with the needs of both employers and employees. This session is expected to take place in September 2026.

On the basis of the outcomes of that session and this market consultation, the next steps in the process will be determined. If it becomes clear that additional input from the market is required, a second round and/or a new market consultation may be organised.