

# EETS-Facilitation Platform

## **24<sup>th</sup> Progress Report**

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## 1 Introduction

The EETS Facilitation Platform (EFP) aims at the facilitation of EETS by coordination and communication. The platform has two key elements:

- The EETS Information Sharing Platform (<https://eetsinfoplatform.eu/>)
- EETS Implementation Facilitation: Facilitation of cross-border implementation activities.

As one instrument to document the progress and activities with the implementation of the EETS, the members of the EETS Facilitation Platform (EFP) decided to inform about major activities in form of half-yearly progress reports. This report covers the period from 30.06.2025 – 31.12.2025 and provides an overview of:

- Activities within the EFP Platform (Chapter 2)
- EETS Developments and Outlook (Chapter 3)
- Progress reports by EFP Toll Chargers (Chapter 4)
- Progress reports by EFP EETS- and Service Providers (Chapter 5)

Whereas the EFP Secretariat has prepared chapters 1 - 3, the respective Toll Chargers and EETS-/ Service Providers have prepared contributions to chapter 4 and 5.

## 2 EETS Facilitation Platform

### 2.1 Members of the EFP Platform: Status

The basis of the cooperation within EFP is a Memorandum of Understanding. As of 31.12.2025, the MoU (Version 2.0) has been signed by 48 Toll Chargers, Member States, EETS Providers, Service Providers or Associations.

The following organisations are members of the EFP Platform:

Organisation	Country	Role (TC, EP/SP, Member State)
Association of European Toll and Interoperable Services (AETIS)	N/A	Association
Association Européenne des Concessionnaires d'Autoroutes et d'Ouvrages à Péage (ASECAP)	N/A	Association
Bundesministerium für Verkehr (BMV)	Germany	Member State
Bundesministerium für Innovation, Mobilität und Infrastruktur (BMIMI)	Austria	Member State
Ministero delle infrastrutture e dei trasporti of the Republic of Italy (MIT)	Italy	Member State
Ministère de la Transition écologique et de la cohésion des territoires	France	Member State
Ministerio de Transportes y Movilidad Sostenible of the Kingdom of Spain (MITMS)	Spain	Member State
Ministerstwo Infrastruktury of the Republic of Poland	Poland	Member State
Ministry of Infrastructure and Water Management of the Netherlands	Netherlands	Member State
Transportministeriet	Denmark	Member State
Associazione Italiana Società Concessionarie Autostrade e Trafori (AISCAT)	Italy	TC
Associação Portuguesa das Sociedades Concessionárias de Auto-Estradas ou Pontes com Portagens (APCAP)	Portugal	TC

Association professionnelle des Sociétés Françaises concessionnaires ou exploitantes d'Autoroutes et d'ouvrages routiers (ASFA)	France	TC
Autobahnen- und Schnellstraßen-Finanzierungs-Aktiengesellschaft (ASFINAG)	Austria	TC
Bundesamt für Logistik und Mobilität (Federal Office for Logistics and Mobility) (BALM)	Germany	TC
Bundesamt für Zoll und Grenzsicherheit (Federal Office for Customs and Border Security) (BAZG)	Switzerland	TC
Družba za avtoceste v Republiki Sloveniji (DARS)	Slovenia	TC
ΕΛΛΗΝΙΚΕΣ ΥΠΟΔΟΜΕΣ και ΟΔΟΙ ΜΕ ΔΙΟΔΙΑ, known also as Hellenic Association of Toll Road Network (HELLASTRON)	Greece	TC
Krajowa Administracja Skarbową (KAS)	Poland	TC
Narodna dialnicna spolocnost (NDS)	Slovakia	TC
Nemzeti Útdíjfizetési Szolgáltató Zrt. (NÚSZ Zrt.)	Hungary	TC
Øresundsbron	Sweden	TC
Dienst Wegverkeer (RDW)	Netherlands	TC
Ředitelství silnic a dálnic s. p. (ŘSD)	Czech Republic	TC
Asociación de Empresas Constructoras y Concesionarias de Infraestructuras (SEOPAN)	Spain	TC
Sund & Bælt Holding A/S	Denmark	TC
Via Lietuva	Lithuania	TC
Viapass	Belgium	TC
Axxès SAS	France	EP
BroBizz A/S	Denmark	EP
DKV Euro Service GmbH + Co. KG	Germany	EP
Øresundsbro Konsortiet (ØresundPAY)	Sweden	EP
Pagatelia (Verra Mobility)	Spain	EP

Telepass S.p.A.	Italy	EP
Toll4Europe GmbH	Germany	EP
tolltickets GmbH	Germany	EP
TotalEnergies Marketing Services SA	France	EP
UnipolTech S.p.A.	Italy	EP
W.A.G. Payment Solutions a.s. (Eurowag)	Czech Republic	EP
E100 International Trade Sp. z o.o	Poland	SP
Egis Easytrip Services SA	France	SP
euroShell Deutschland GmbH & Co. KG	Germany	SP
Eurotoll SAS	France	SP
MS Europe B.V.	Netherlands	SP
Satellic NV	Belgium	SP
Trafineo GmbH & Co KG	Germany	SP
Union Tank Eckstein GmbH & Co. KG (UTA)	Germany	SP
Via Verde Portugal – Gestão de Sistemas Electrónicos de Cobrança S.A	Portugal	SP

## 2.2 EFP Executive Board

The EFP Executive Board held two meetings in the reporting period. The meetings focused in particular on the following topics:

- Preparing for the Working Group meeting in Copenhagen (DK, October 2025)
- Membership issues
- Organisational issues

## 2.3 EFP Working Group Meeting in Copenhagen

On 28.10.2025 and 29.10.2025, the EFP held a Working Group Meeting in Copenhagen. The meeting focused in particular on the following topics:

- Artificial Intelligence: Challenges and perspectives in tolling and road operation
- EETS Accreditation and possibilities for harmonization
- Information on new tolling systems (Switzerland and Region Grand EST)
- Updates from EFP Members (Tour de Table)

In addition to that a common EFP Statement concerning the proposal for CO2-based tolling for trailers was developed during the meeting and sent to the European Commission and the European Parliament afterwards. The Statement shall reflect the concerns of the EFP Members regarding the proposal submitted by the European Commission.

The feedback was that the meeting was well received by the EETS community, the content was informative and also provided possibilities for discussion and informal talks among participants. The next Working Group meeting is scheduled for 1.4.2026 – 2.4.2026 in Brussels (BE).

## 2.4 EFP Website (EETS Info Platform)

The EETS Info Platform is a unique point of access on the internet regarding comprehensive EETS-related information (<http://www.eetsinfoplatform.eu/>).

Members are invited to check the website regularly and provide the EFP Secretariat with updates or current news that can be posted on the website.

The EFP Secretariat and the ASECAP Secretariat works together to maintain the EETS Info Platform website with updates received from the EFP Members.

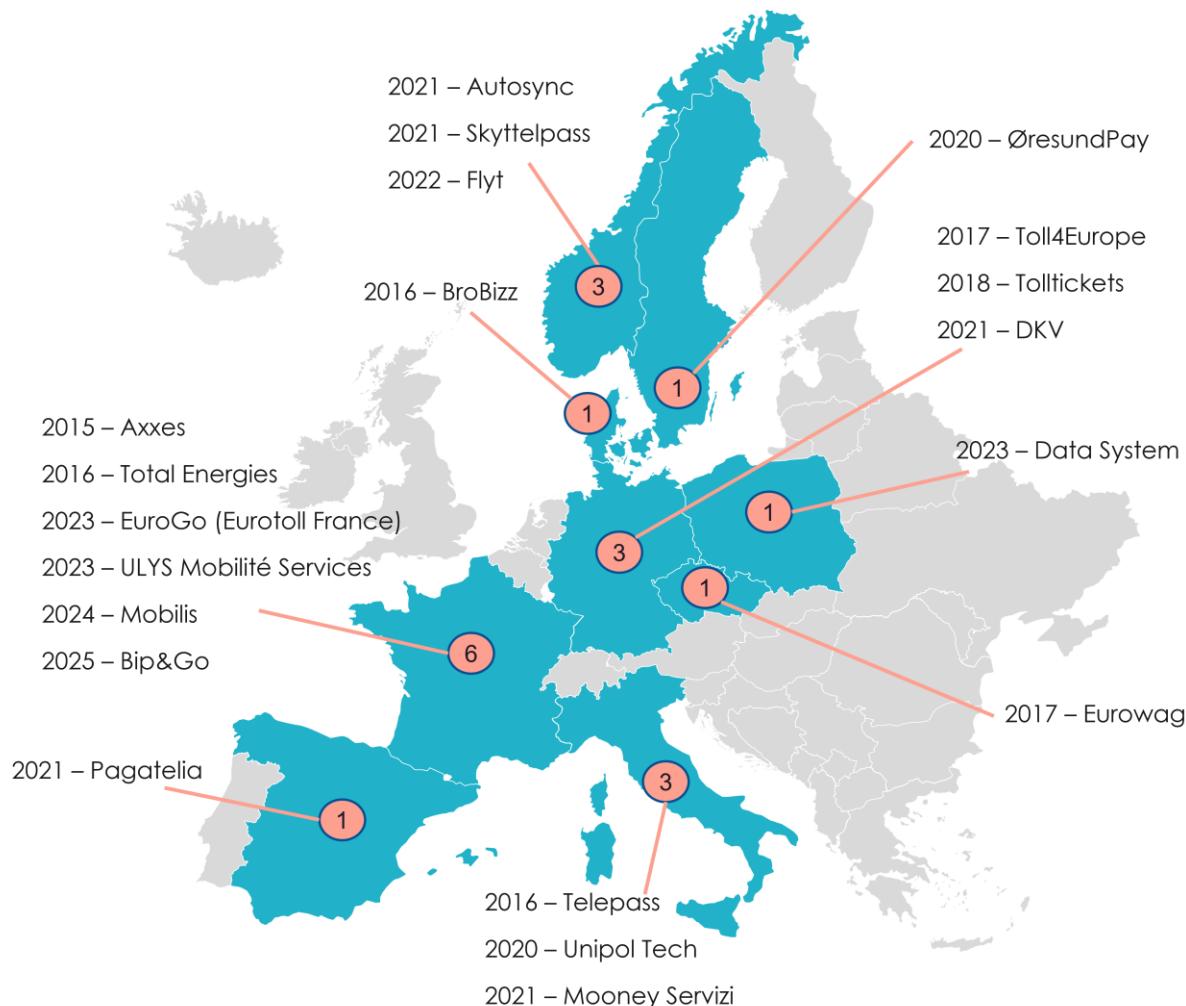
## 3 EETS Developments and Outlook

### 3.1 EETS Providers

As far as the EFP Secretariat is informed there are currently 20 registered EETS Providers across Europe which are the following:

- Autosync
- Axxès
- Bip&Go
- BroBizz
- Data System
- DKV Euroservice
- Eurotoll France
- Flyt
- Mobilis
- Mooney Servizi
- Øresundsbro Konsortiet (ØresundPAY)
- Pagatelia (Verra Mobility)
- Skyttelpass
- Telepass
- Toll4Europe
- Tolltickets
- TotalEnergies Marketing Services
- ULYS Mobilité Services
- Unipol Tech
- W.A.G Payment Services (Eurowag)

The following map illustrates in which countries and since when the EETS Providers are registered:



The above overview of registered EETS Providers in Europe reflects the information available to the EFP Secretariat. It seems correct to say that all EETS Providers with established international operations are included in this report, but newly established EETS Providers or EETS Providers acting only locally / regionally could be missing. EFP Members are invited to give feedback on this map if necessary.

## 3.2 Market Developments and Outlook

### EETS or local contract(s)?

When the EETS concept was introduced more than 20 years ago, it was presented as an alternative to local contracts, and it was directed towards hauliers in international (cross-border) traffic.

In most toll domains the electronic tolling was introduced with a main service provider, who offered electronic tolling services for one toll domain. The role of main service provider was fulfilled by the Toll Charger organisation or through a separate company. Only later Service Providers /EETS Providers got access to the toll domain and offered their services in competition to the main service provider.

The competition between main service providers and EETS Providers is an uneven competition. The main service provider can only offer tolling services in the one toll domain, where he has been appointed or contracted as main service provider. In addition, he has the obligation to accept every customer.

The EETS Providers – offering tolling services for several toll domains and countries – have strong selling arguments when promoting the cross-border tolling services with one OBU, one contract and one invoice to the road users. The effect is an increasing market share for EETS Providers when road users cancel their contracts with main service providers.

The advantage of the main service provider is that his solutions only have to fulfil the requirements for a single toll domain. This might allow smart and relatively simple solutions.

The EETS Providers must fulfil a combination of complex and different requirements from several Toll Chargers, so also in this respect there is an uneven competition.

What does this uneven competition mean for a Toll Charger? Needless to say, the Toll Charger can only set requirements and allow options for his own toll domain. The question is currently on the agenda in Germany, where the main service provider Toll Collect introduces a mobile app for tolling. The EETS Providers claim that they must also be allowed to introduce a mobile app for the German toll domain, to avoid distortion of competition. Is the claim from the EETS Providers reasonable? The answer depends on who you ask. No matter how the German Toll Charger proceeds on this specific matter, there will be an uneven competition between main service provider and EETS Providers.

The road users do not have to care whether there is an uneven competition between main service providers and EETS Providers. They can select the offer that suits them for fulfilling the toll payment obligations. The development shows that the cross-border EETS service is attractive, but somewhere there is a limit to the EETS market share. The next years will give the answers where that limit is for a toll domain.

Starting from completely different positions, Denmark with the KmToll toll domain and France with the concessions have achieved a status where electronic tolling is offered to 100% from EETS Providers. In Denmark the alternative to EETS is single route tickets and in France the alternative is manual payments at the toll plazas (or elsewhere in case of free-flow).

## **Outlook and changes**

### Changes:

There is a never-ending flow of changes in electronic tolling. Some of the recently completed changes include

- Germany: Migration to central map matching and tariff calculation (MED) is completed.
- Switzerland: the 3<sup>rd</sup> generation system (LSVA III) is in full operation and all EETS Providers with certification from the previous system are certified for LSVA III.
- CO2 tolling: introduced in Slovakia and Slovenia.

Ongoing changes are

- Italy: migration to new back-office interfaces between Toll Chargers and EETS Providers.
- CO2 tolling: in preparation in Bulgaria, Poland and Belgium.

Upcoming changes include

- Slovakia: new tolling system with changed EETS back-office interfaces in first half of 2027.
- Austria, Slovenia, Øresund and Storebælt: Replacement of EasyGo Hub with peer-to-peer connections and new back-office interfaces based on a common EasyGo interface specification.
- Belgium: preparation of a tender for the next generation of the tolling system.

Changes in liability for paying toll:

- Hungary: since 01.01.2026 recreational vehicles / motorhomes are not liable to pay distance-based toll anymore. Instead, an e-vignette is required.
- Germany: Zero-emission vehicles are exempted from toll until 30.06.2031.
- Denmark KmToll: extension to trucks/vans above 3,5 tons from 01.01.2027.

The changes represent investments and efforts for the Toll Chargers. It also has to be repeated that one consequence of all the changes is that the EETS Providers must spend an increasing share of their resources to maintain their existing interoperable toll service, and that means reduced capacity for expanding to further toll domains. This effect increases year by year.

### Expansion with new tolling systems

New tolling systems, where the implementation project is ongoing and EETS is a core element of the solution, include:

- Netherlands: HGVC from 01.07.2026.
- France: region Alsace from 01.01.2027 and region Grand Est from 01.07.2027.

Romania has adopted a law which foresees introduction of electronic tolling from 01.07.2026, but there is no mentioning of EETS in that context. The expectation in the market is that the date cannot be met. Whether an EETS compliant solution can be achieved is open.

Lithuania has in the past announced the intention to base their new electronic tolling system on EETS. With a legally defined start date of 01.01.2027, it is very challenging to implement a full-scale tolling solution with a broad integration of EETS Providers.

### Legal changes

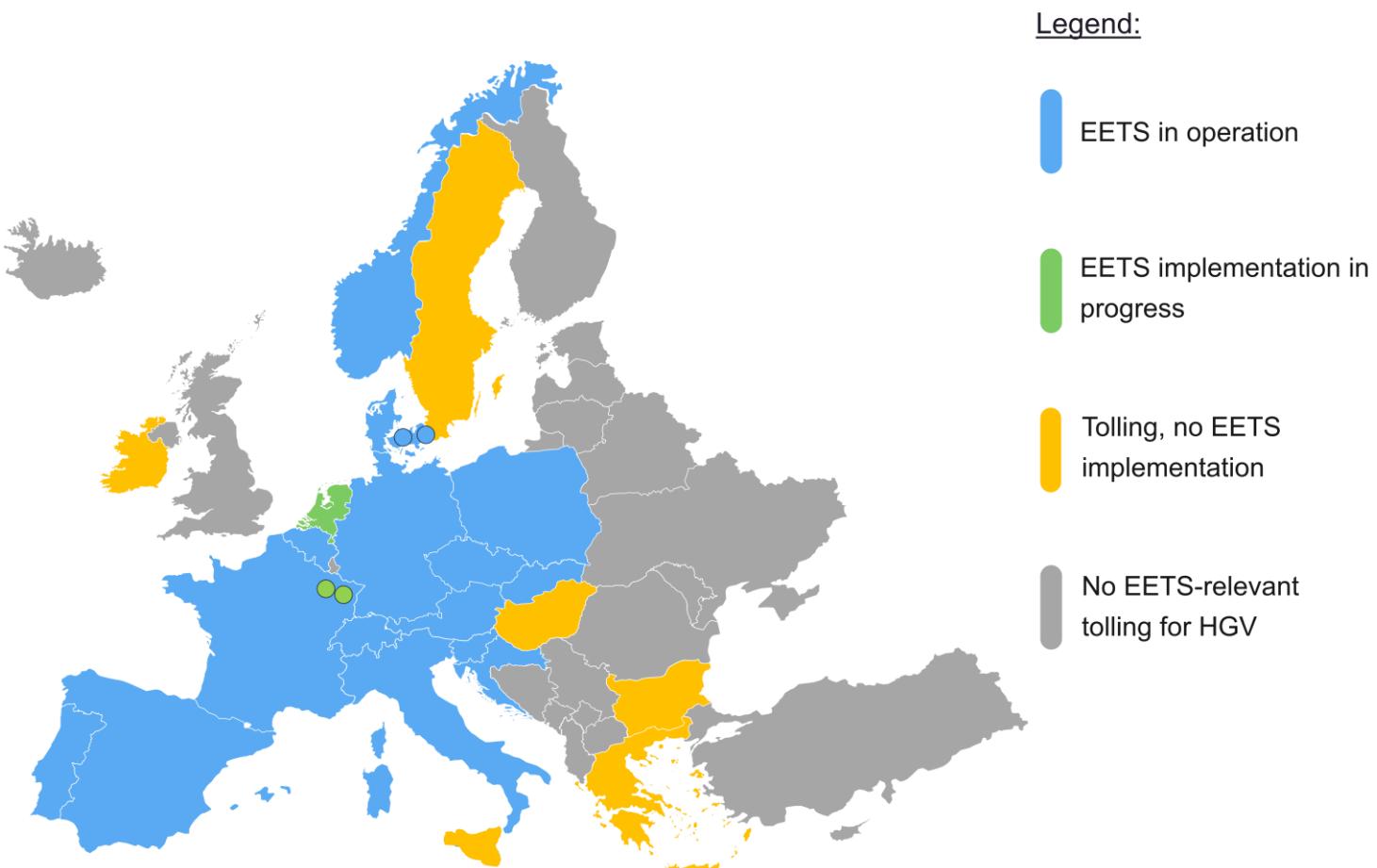
There is no date set for the next revision of the EETS Directive, but previously it has been indicated by DG Move that a revision could be prepared for 2027 / 2028. There are certainly clauses which should be adapted based upon the experiences with EETS until now. For the remuneration topic the guideline was issued last year, and it could be useful to adopt some main principles from the guideline into the EETS Directive.

Article 4 and especially Article 5 (1) of the EETS Directive (EU) 2019/520 define the rules for registration of EETS Providers and the criteria for keeping a registration. EETS Providers have the obligation to conclude EETS contracts covering all EETS domains on the territories of at least 4 Member States within the 36 months following their registration. How will the Member States interpret this rule? Does concluding an EETS contract mean direct contract with a Toll Charger, or could it also be through a partner? Is there any room for extension of the 36 months deadline? Is this rule generally too strict and should it be softened? What are the consequences if the requirement for coverage of at least 4 Member States is not met?

It would be critical if several EETS Providers would lose their registration due to these rules. There will in any case be a certain concentration on the EETS Provider market, simply due to the high complexity of providing EETS services and the economies of scale. If the articles on EETS registration are handled strictly, the market concentration will be reinforced.

### 3.3 Overview of EETS in Europe

The map below provides a quick overview of the status of EETS in Europe. The input to the map basically comes from the individual reports on the toll domains, as well as general market knowledge.



A remark to the map is that it generally contains high-level information on the country-level. Please also note that the map focuses on whether EETS is practically in operation, implementation is in progress or not available from a market perspective. This map contains no information on whether the EETS Directive 2019/520 has been transposed into national legislation or not.

Further remarks are:

- Italy: The Sicilian Toll Charger (CAS) does not support EETS.
- Sweden is marked with no EETS implementation due to that neither the local city rings nor the toll bridges (Motala / Skuru / Sundsvall) support any EETS solutions. Øresund, which from a tolling perspective is a part of Sweden, fully supports EETS and is marked with a dot in "blue".

- Denmark's nationwide "KmToll" toll domain and the Storebælt bridge fully support EETS. Storebælt is illustrated with a dot in "blue".
- Netherlands is the only nationwide tolling scheme where EETS implementation is in progress.
- In France the regions Alsace and Grand Est have also started the implementation of their tolling schemes, including EETS. They are illustrated with dots in "green".

## 4 EFP Toll Charger: Progress Report

### 4.1 AISCAT / Italy

#### 4.1.1 Name of National Provider/Issuer OBUs

Legacy service: Telepass S.p.A.

#### 4.1.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
i. AXXÈS	i. IN OPERATION	i. 2021/05/10
ii. UNIPOLTECH	ii. IN OPERATION	ii. 2021/12/06
iii. DKV EURO SERVICE	iii. IN OPERATION	iii. 2023/05/02
iv. TOLLTICKETS	iv. IN OPERATION	iv. 2023/08/04
v. AS24 ITALIA <sup>1</sup>	v. IN OPERATION	v. 2024/02/19
vi. TELEPASS	vi. IN ACCREDITATION	vi. Not applicable

#### 4.1.3 List of accredited OBU of EP/SP

In Italy, the accreditation procedure refers to EP/SP, therefore a list of accredited OBUs is not available. However, the table below reports a list of the OBUs in operation for each EP/SP.

Name of EP/SP	OBUs (in operation)	Version
DKV	Norbit VTR850-B	V.2.19.4
DKV <sup>1</sup>	Norbit VTR850-B	V.2.19.4
DKV <sup>1</sup>	Yunex C3080 T4E	GoMa 4.9
Axxès <sup>1</sup>	Kapsch TRP 4010-20B	
Axxès	Kapsch TRP 4010-20B	
Axxès	Kapsch 5310-00A	V.4.7.48
Axxès	Yunex C3081 (pilot)	
UnipolTech	Norbit VTR850-B	V.2.26.11
UnipolTech	Norbit VTR850-UB	DSRC: v2.32.0 - BLE: version 02.00
UnipolTech <sup>1</sup>	Norbit VTR850-B	V.2.26.11

<sup>1</sup> Interoperable national service

TollTickets	Kapsch 5310-00A (pilot)	V.01.03.01
TollTickets	Kapsch TRP 4010-20B	
TollTickets	Kapsch 5310-22A (pilot)	V.02.04.00
AS24 Italia <sup>1</sup>	Yunex C3081	V.3.2.4
AS24 Italia <sup>1</sup>	Kapsch TRP 4010-20B (pilot)	

#### 4.1.4 Legal and contractual status

- Implementation of EETS Directive 2019/520/EU: The EETS Directive 2019/520/EU was transposed in the Italian law by the Legislative Decree (DLGS) nr. 153/2021 (no changes since the last progress report). Referring to the service contract between TC and EP, the Italian motorway sector finalized an updated contractual scheme, preliminarily discussed with the EPs who have signed a contract to provide the service in Italy. The new contractual template, compliant to the Italian Competition Authority provisions (ref. investigation nr. A553), is aimed at updating the communication flows to the provisions of EU Dir. 520/2019 and to the revisions of the technical standard ISO 12855, as well as at meeting the operational requirements to improve the service provided to the users.
- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling): the application period will start on 25 March 2026; the Italian Ministry of Infrastructure and Transport is working on the transposition: the Italian TCs are evaluating the potential impacts due to the application of this directive.
- Update on EETS Domain Statements and tolling regulations: Toll Domain Statements are regularly updated, by the end of each year, or according to specific needs. During the last 6 months of 2025 no changes have been reported by TCs.

#### 4.1.5 EETS market development

Considering both heavy goods vehicles and light vehicles, at the end of 2025 the EETS service covers approximately 15% of total ETC transactions. Compared to 2024, the penetration of the EETS service has increased by approximately 5% of total ETC transactions.

#### 4.1.6 Outlook for the next 12 Months

- Ongoing accreditations: 1 new OBE accreditation procedure is currently ongoing with an EP in operation. Furthermore, VRS (pilot) phase is currently in progress for 4 OBUs with accredited operators.
- Ongoing re-accreditations: 2 OBE re-accreditation procedures are currently on going, one of which with the National Service Provider (OBE without GNSS/Mobile network).

- Expected accreditations: 1 new OBU accreditation from EP/SP currently in service, 2 OBEs will conclude the running accreditation process.
- Planned OBE re-accreditation: 3 planned OBE re-accreditations and at least another re-accreditation over 2026 are foreseeable.
- Relevant changes in toll domain: No updates since the last progress report.

#### 4.1.7 Other Issues and Developments

- About the adoption of the last version of the back-office electronic fee collection protocol (ISO EN 12855:2022, application profile of the CET/TS 16986), 2 EP are using the new back-office standard (while testing the messages for advance services - like the ones for managing user complaint or charging RMPP); another EP will start in early 2026 the test to implement the new interfaces and another one is developing the interfaces, which will be tested with the Italian TCs in the second half of 2026. The Italian TCs look forward to introducing the new back-office standard with all the EP/SP in order to improve the service level towards the users.
- During the 2025, the Italian TCs with the coordination of AISCAT are continuing the work inside the ETC coordination structure (*Struttura Coordinamento Telepedaggio*). The committee brought common issues and solutions to improve the EETS service (e.g. update of the ETTS contract template, improvement in blacklist management, management of special clients such as voluntary associations/ambulances and police in the ETTS, etc.).
- During the 2025, the Italian TCs with the coordination of AISCAT are still scheduling the bi-monthly meetings with the EPs focusing on the monitoring the ETC services and on the EETS service improvement.
- During the second half of 2025, a working group AISCAT-AETIS was set up by the Ministry of Infrastructures and Transport to assess the DG Move Remuneration Study (published in May 2025) and the following “Commission Notice on interpretative guidelines concerning Articles 6 and 7 of Directive (EU) 2019/520 on the interoperability of electronic road toll systems and facilitating cross-border exchange of information on the failure to pay road fees in the Union” published in December 2025.

## 4.2 APCAP / Portugal

### 4.2.1 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Via Verde Portugal	In Operation	n/a
CTT Portugal	In Operation	n/a

Via Verde acts as the hub for Portuguese Toll Chargers. Via Verde set its priorities towards concluding full interoperability with Spain and continues to develop efforts towards a strategic definition on how to move towards France and other countries.

Regarding Spain, efforts continue in order to solve technical issues related with Road Side limitations, mainly black list length, on the Toll Charges involved in Basque Country and other small operator.

For France and other countries, Via Verde kept the effort to discuss scenarios with multiple stakeholders, in order to define a proper strategy to address French interoperability aspects, for both Heavy Goods and Light Vehicles. Indirect model has been defined and is looking for partners.

Regarding foreign acceptance, with the implementation of the transposition of the interoperability law the products available through CTT for foreign drivers, based on ALPR – vehicles without OBU, are now available in all Toll Domains in Portugal (Traditional tolling and MLFF).

Currently, through Via Verde, the OBU's from these issuers are accepted in the Portuguese electronic toll network:

Issuer	Representant
ANDBANK	NGB
BANCO CAMINOS	NGB
BANCO CEISS	NGB
BANCO COOPERATIVO ESPAÑOL S.A.	NGB
Banco Espírito Santo	NGB
Banco Mediolanum	NGB

Banco Mare Nostrum	NGB
Banco Pastor	NGB
Banco Popular	NGB
Banco Sabadell	NGB
Banco Santander	NGB
Banesto/Openbank	NGB
Bankia	NGB
Bankinter	NGB
BANKOA	NGB
BBK/Kutxabank	NGB
BBVA	NGB
CAIXA ONTINYENT	NGB
Caixabank	NGB
Caja Almendralejo	NGB
Caja de Arquitectos	NGB
CAJA DE INGENIEROS	NGB
Caja Duero	NGB
Caja España	NGB
Caja3	NGB
Cajas Rurales Unidas, S.C.C.	NGB
Cajasur/Kutxabank	NGB
CatalunyaCaixa	NGB
Cecabank	NGB
Echeverria	NGB
Eurocaja Rural	NGB
EVO Banco	NGB
Ibercaja	NGB
Kutxa/Kutxabank	NGB
Laboral Kutxa	NGB
Liberbank	NGB
Novagalicia Banco	NGB
Unicaja	NGB
Vital Kutxa/Kutxabank	NGB
Bip&Drive	Bip&Drive

Bip&Go	Bip&Drive
CEPSA	RESSA
DKV	RESSA
Ingenico	Ingenico
Pagatelia	Pagatelia
RESSA	RESSA
SERVISA	RESSA
Solred	Solred
Telepass	Bip&Drive
Telepass	Pagatelia
Tolltickets	Tolltickets
Vinci	Pagatelia
Easytrip	Pagatelia
AS24	RESSA
EuroWag	Pagatelia

#### 4.2.2 List of accredited OBU of EP/SP

- OBU 610, 615F, 615S and 615R – Q-Free
- OBU VTR850-B - Norbit
- OBU TRP4010-01A – Kapsch
- OBU TS3203/11D – Kapsch

#### 4.2.3 Legal and contractual status

The adjustments to the DL nº84-C/2022, Portuguese transposition of the interoperability directive, entered in force in January 8<sup>th</sup> 2025.

Revision off the Domain Statements and development of the regulations expected with the transposition of the Directive to National legislation. New Domain Statements from TC in evaluation at National Sector regulator authority (AMT), still pending approval from the regulator.

Development of cross border enforcement by facilitation of access to the DMV database (via Eucaris) – still not available, the national public Entity had started, at the end of the year, to make some few inquiries to some operators about contracts amendments and designated users.

Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling) transposed to national law by DL nº 38/2025 at March 2025, but with no impact on current concession contracts.

No CO<sub>2</sub> based tolling initiatives known.

#### **4.2.4 EETS market development**

N/A

#### **4.2.5 Outlook for the next 12 Months**

For the next 12 months we expect to continue the implementation of the adjustments defined by the law DL 84-C/2022, with adjustments on the toll domains (updated domain statement, technical and processual adjustments in the toll systems (MLFF and Traditional)).

Approval and or requests for clarifications expected from AMT (Public Entity - Regulator).

Other existing local service providers (CTT) have its Toll products available in all toll domains.

#### **4.2.6 Other Issues and Developments**

On 3 May 2024, the Portuguese Parliament approved legislation to terminate toll charging on a set of "interior" motorway sections (former SCUT corridors and routes deemed to lack adequate alternatives), affecting 7 concession contracts and 2 State motorways operated under service contracts, all equipped with MLFF tolling. The measure entered into force on 1 January 2025, abolishing toll collection across an affected network of approximately 889 km; as of 31 December 2025, this toll-abolition regime remained in effect throughout 2025.

In addition, the State Budget Law for 2026 (Law no. 73-A/2025, published on 30 December 2025; effective from 1 January 2026) introduced further measures impacting tolling. Under Article 203, residents/locally established entities within defined "areas of influence" benefit from toll exemptions on specific tolled corridors: A6 between the A2/A6/A13 node and Caia (Marateca–Caia corridor is ~158 km, of which ~140 km are tolled) and A2 between the A2/A6/A13 node and Almodôvar (~156 km). Under Article 204, the Government must complete studies by end-2026 on (i) traffic flows in the Porto Metropolitan Area (including potential tolling changes for congestion management) and (ii) traffic impacts near the Monastery of Batalha; pending those studies, tolls are temporarily suspended for heavy goods vehicles on the A41 (entire CREP, ~62 km) and on the A19 São Jorge–Leiria Sul (approx. 14 km) plus A8 Leiria Sul–Pousos (approx. 6 km).

## 4.3 ASFA / France

### 4.3.1 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Axxès	In operation (HGV domains)	02/01/2007
Eurotoll	In operation (HGV domains)	15/01/2007
TotalEnergies	In operation (HGV domains)	22/01/2007
DKV	In operation (HGV domains)	10/03/2008
Telepass	In operation (HGV domains)	22/02/2013
UMS	In operation (LV domains)	21/01/2025
Mobilis	In accreditation (LV domains)	Pilot Phase on going

### 4.3.2 List of accredited OBU of EP/SP

Autotrade Tech	EECOTS01
Autotrade Tech	EECOTS02
Autotrade Tech	ETOLL2ST-HE
Autotrade Tech	TLPDM02
Autotrade Tech	TLPDM03 and TLPDM03-HE
Autotrade Tech	TLPV5 and TLPV5-HE
CSSI	MELODHY 2 CS150 (without buzzer)
CSSI	MELODHY 2 CS151 (with buzzer)
CSSI	MELODHY 2 CS161
EFKON	FZ2358 (Standard OBU)
EFKON	FZ3458 (GoBox OBU)
GEA	XG 5000
Kapsch TrafficCom	OBÜ 5310-22A
Kapsch TrafficCom	OBÜ-5310-00A
Kapsch TrafficCom	PREMID TS3203/10B
Kapsch TrafficCom	PREMID TS3203/10B RAM Firmware
Kapsch TrafficCom	TR 4030-01A Bluetooth
Kapsch TrafficCom	TRP 4010/00A and TRP4010/10A (and 01A and 11A)

Kapsch TrafficCom	TRP 4010-20B/21B and TRP4010-30B/31B
Kapsch TrafficCom	TS 3203/10D
Kapsch TrafficCom	TS 3290-00A and TS 3290-00B
Masternaut	TRIBOX.R1
Movyon	TLPV5.1
NORBIT ITS AS	VTR 850-B and VTR850-T
Princip	OBU U850
Q-Free	MD 5884
Q-Free	OBU 615
Q-Free	OBU 615-U
Q-Free	OBU 610
SIEMENS	SSU C3080 (OBU-C3080-T4E)
SIEMENS Austria	SSU C3077 (SITRAFFIC SENSUS UNIT)
TELEPASS	ETOLLK1TL
Thalès GEA	TG 4400
TollNet	Billien OBU5050
Yunex	SSU C3081
Aumovio	OBU5+
Aumovio	VDO-Link Tolling Solution

#### 4.3.3 Legal and contractual status

##### Implementation of EETS Directive 2019/520/EU

- The EETS Directive has been implemented in national legislation.
- ASFA has led the drafting of a new contractual framework, the TIS SET VL/ PL (which stands for “toll interoperable system EETS heavy vehicles / light vehicles”), covering both heavy and light vehicles, that replaces TIS-PL. The structure is the same: a contract between all the French concessionaires and a “framework contract template” to be concluded between each toll charger and each EETS provider. The framework contract is supplemented by specific conditions negotiated bilaterally between each concessionaire and each EETS provider. ASFA answered to questions raised by the EETS providers on the “framework contract template”, took into account some of the suggestions for amendments and organised bilateral meetings with the EETS providers, if requested. The negotiations on the “framework contract template” with EETS providers have come to an end. The latest version of the contract was approved in Autumn 2024, by all the toll chargers and EETS provided, reunited in the “Comité TIS SET”, a new institution, with decision-

making powers, within which toll collectors and EETS providers, registered and active in France, cooperate to ensure the implementation of the EETS Directive and the interoperability of electronic toll collection in Europe.

The EETS providers are signing the agreement (framework contract and specific conditions).

Implementation of Eurovignette Directive 2022/362/EU (including CO2 based tolling)

The legal and regulatory provisions implementing the Directive will apply as concession contracts are renewed.

- **The Law of 9 March 2023** containing various provisions for adapting to European Union law in the fields of the economy, health, labour, transport and agriculture, transposes some of Eurovignette Directive's provisions. This law provides for tolls to be modulated according to the carbon dioxide emissions of heavy goods vehicles. It provides for toll exemptions and reductions, under conditions defined by decree.

Tolls are also increased by an external cost charge linked to air pollution caused by traffic.

- A **Decree of 27 December 2023** is intended to specify the conditions of application of the modulation by dividing vehicles into carbon dioxide emission classes in accordance with the provisions of paragraph 2 of Article 7gbis of Directive (EU) 1999/62. The methods for calculating the financial neutrality of the modulation, as well as the extent to which the toll varies according to the vehicle's carbon dioxide emission class, are specified in the concession agreements.
- An **Order of 9 January 2024** from the Minister responsible for national roads specifies the maximum reference values for external cost charge. These values are set according to the environmental performance of the vehicle, its technical characteristics and the suburban or interurban nature of the road section used. Where a road section has a non-homogeneous suburban or interurban character, the reference value taken into account is that relating to the character of which the length is in the majority and applies indiscriminately to the entire section, as specified in the specifications of the concession agreement. Where a driver is unable to certify the vehicle's emissions class, the maximum charge payable is applied.

Update on EETS Domain Statements and tolling regulations

- Upcoming opening of EETS domain for all vehicle categories.

- Updated toll domain statements have been published by the ART.  
<https://www.autorite-transports.fr/les-autoroutes/service-europeen-telepeage/>

#### 4.3.4 EETS market development

##### **tis-pl**

###### **LE TÉLÉPÉAGE DES POIDS LOURDS**

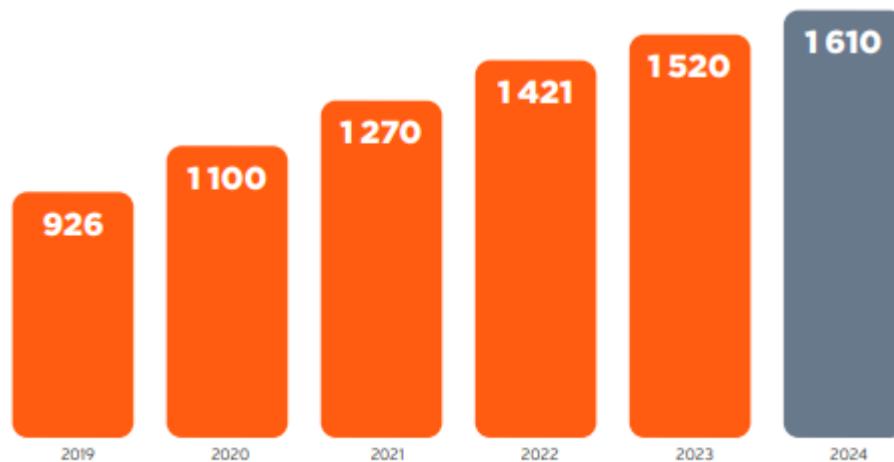
Electronic toll collection for trucks



###### **ÉVOLUTION DU NOMBRE D'ABONNÉS *tis-pl***

Evolution of subscribers numbers

En milliers / In thousands



#### 4.3.5 Outlook for the next 12 Months

- The deployment of free flow solutions will continue.
- Framework contract template toll charger – EETS provider: the signature procedure is coming to an end; this contract replaces TIS-PL.
- Accreditations under TIS SET framework:
  - For TIS SET PL: EuroGo, DKV, Telepass, TotalEnergies
  - For TIS SET VL: UMS
  - Mobilis to continue pilot phase in order to be accredited for TIS SET VL

- Expected accreditations for TIS SET VL:
  - EuroGo: suitability for use is ongoing
  - Bip&Go has submitted its application
- Planned re-certifications:
  - Estimated number of OBE certifications and re-certifications: 5 -10

#### 4.3.6 Other Issues and Developments

Two new toll chargers are expected to start their operations in France in 2027: CeA and Région Grand Est. They will operate GNSS domains tolled only for vehicles above 3.5t.

The commissioning of the free flow A69 motorway, between Castres and A680 motorway (Atosca concession), is planned in autumn 2026. The future A412 motorway, 15km between Machilly and Thonon-les-Bains, will be operated in free flow by Amedea. It is planned to be in operation in 2029.

Both Atosca and Amedea will be CEN DSRC toll domains for all categories of vehicle.

## 4.4 ASFINAG / Austria

### 4.4.1 Name of National Provider/Issuer OBUs

ASFINAG Maut Service GmbH

### 4.4.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
BroBizz	In operation	2013
Telepass	In operation	2017
DKV	In operation	2017
Axxès	In operation	2018
Total/AS24	In operation	2018
Tolltickets	In operation	2019
Eurowag	In operation	2021
Toll4Europe	In operation	2022
ØresundPAY	In operation	2024

### 4.4.3 List of accredited OBU of EP/SP

In alphabetic order:

Autostrade Tech	TLPDM03-HE	In Operation
Autostrade Tech	ETOLL2ST-1HE	In Operation
Autostrade Tech	TLPV05-HE	In Operation
Kapsch SE	TS3290-00A	In Operation
Kapsch SE	TS3290-00B	In Operation
Kapsch SE	OBÜ-5310-00A	In Operation
Kapsch SE	OBÜ-4040-00A	In Operation
Kapsch SE	OBÜ-4040-10A	In Operation
NORBIT	VTP-1425	In Pilot Operation
Princip	Princip U850	In Operation
YUNEX	SSU C3077	In Operation
YUNEX	SSU C3080-T4E	In Operation
YUNEX	SSU C3081	In Operation
Telepass	ETOLLK1TL	In Operation

#### 4.4.4 Legal and contractual status

- Implementation of EETS Directive 2019/520/EU:  
 Directive 2019/520/EU was implemented in Austria on 19<sup>th</sup> of October 2021.  
 No change since the last report.
- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling):  
 Directive 2022/362/EU was implemented in Austria on 1<sup>st</sup> of January 2024.  
 No change since the last report.
- EETS Domain Statements and Tolling Regulations:
  - EETS Domain Statement:  
 Valid Version: V. 1.0/2023 from 1<sup>st</sup> of December 2023  
 No change since the last report.
  - Tolling Regulations:  
 Valid Version: V.87 from 1<sup>st</sup> of January 2026
- EUCARIS:  
 The implementation of the information exchange took place on 9<sup>th</sup> of December 2021.  
 No change since the last report.

#### 4.4.5 EETS market development

N/A

#### 4.4.6 Outlook for the next 12 Months

- Expected accreditations (EETS Provider)
  - No new accreditations currently planned (or requested)
- Planned re-certifications (OBE)
  - Estimated number of OBE certifications and re-certifications: 5-10
- Relevant changes in toll domain
  - The new (peer-to-peer) interface: The first migration of an EETS provider to the new interface is planned for Q1/2026.
  - CO<sub>2</sub> Tolling: The extension of the scope of application (currently: 4, 5, 9 and 10) to vehicle subgroups 1, 2, 3, 11, 12 and 16 has been prepared and can be implemented.

## 4.5 Bundesamt für Logistik und Mobilität (BALM) / Germany

### 4.5.1 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Telepass S.p.A.	In operation	April 2019
Toll4Europe GmbH	In operation	May 2019
TotalEnergies Marketing Services SAS	In operation	July 2020
Axxès SAS	In operation	September 2020
w.a.g. payment solutions, a.s. (Eurowag)	In operation	August 2022
Tolltickets GmbH	In operation	November 2022
Brobizz	In accreditation	

### 4.5.2 List of accredited OBU of EP/SP

Autotrade Tech, ETOLL2ST-1HEB (Arianna 2)

Siemens, Sitraffic Sensus Unit C3080

Siemens, Sitraffic Sensus Unit C3077

Siemens, Sitraffic Sensus Unit C3081

Kapsch, TS3290/00B (until end of 2025)

Kapsch, TS3290/00A (until end of 2025)

Eurowag/Princip U850

Movyon, ETOLLK1TL (K1 Telepass SAT)

Kapsch 5310\_22A

Norbit VTP-1425 (in pilot operation)

#### 4.5.3 Legal and contractual status

The implementation of Directive (EU) 2019/520 was completed in October 2021. It included legislative acts to change the relevant laws and decrees as well as changes to the toll domain statement.

The implementation of the new provisions of the Directive (EU) 2022/362 amending the Directive 1999/62/EC was completed in November 2023. The law implementing the Directive was published on 24 November 2023. CO2 tolling was introduced on 1 December 2023. The law also includes the extension of the toll obligation to vehicles over 3.5 t technically permissible maximum laden mass since 1 July 2024 with an exception for craftsmen.

On September 1, 2024, one element of the remuneration of EETS Providers - the usage and payment commission - was adjusted due to corresponding changes in the remuneration of the main service provider. Due to conciliation procedures some adjustments to the remuneration regulations were made. The corresponding EETS accreditation ordinance came into force in October 2025. The current remuneration period ends on 31 December 2027.

Germany has made use of the option provided for in Directive (EU) 2025/2459 and extended the toll exemption for zero-emission vehicles with a technically permissible maximum laden mass over 4.25 tons until June 30, 2031. Vehicles with a technically permissible maximum laden mass of up to 4.25 tons will continue to be permanently exempt from tolls.

#### 4.5.4 EETS market development

The 6 EETS providers accredited for the toll domain BFStrMG now generate about 40% of toll revenue in Germany. Further growth is also expected in the coming months.

#### 4.5.5 Outlook for the next 12 Months

Six EETS providers have full accreditation and are in full operation.

One more EETS provider has started the accreditation process, but it is currently paused (upon request of the provider).

#### 4.5.6 Other Issues and Developments

BALM has introduced a Toll Detection and Tariffing Service (MED) for EETS providers. The service is provided by state-owned Toll Collect GmbH on behalf of the BALM and is mandatory since 1 January 2026. The five EETS providers, who still carried out the detection and tariffing themselves, have successfully migrated their fleet to the MED by end of 2025 so that the migration to the new service was completed for all of them by the end of the year 2025.

## 4.6 Bundesamt für Zoll und Grenzsicherheit (BAZG/ FOCBS) / Switzerland

### 4.6.1 Name of National Provider/Issuer OBUs

As from June 2025, the new national provider NATRAS (<https://natras.ch/en/about-us/>) has started full operations for the **National Electronic Toll Service (NETS)** according to the revised legislation for LSVA III. NATRAS is a joint venture consisting of Kapsch TrafficCom AG and LOSTnFOUND AG, established exclusively for the purpose of providing the national service.

By the end of 2025, the emotach® service provided by the Federal Office for Customs and Border Security (FOCBS) has been stopped completely. The FOCBS has no longer the role of service provider for OBUs.

### 4.6.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger. Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Axxès	in operation	20.03.2023 (LSVA II) 20.06.2025 (LSVA III)
Eurowag (W.A.G Payment Solutions a.s.)	in operation	26.06.2025 (LSVA III)
Telepass	in operation	14.01.2021 (LSVA II) 15.04.2025 (LSVA III)
T4E	in operation	20.08.2021 (LSVA II) 28.11.2025 (LSVA III)
TotalEnergies Marketing Services (TEMS)	in operation	11.12.2025 (LSVA III)
tolltickets	in accreditation pilot phase for LSVA III	

### 4.6.3 List of accredited OBU of EP/SP

- Autostrade Tech S.p.A. ETOLL2ST (accreditation will expire on 30 June 2026)
- Siemens Sitraffic Sensus Unit C3080 (accreditation will expire on 30 June 2026)

- BMoov' - KAPSCH 5310, Firmware 4.07.48 (accreditation will expire on 30 June 2026)
- Telepass S.p.A. ETOLLK1TL
- Yunex Sensus C3081
- Princip a.s. U850 in combination with the communication modul U890
- Norbit VTP-1425

#### 4.6.4 Legal and contractual status

- EETS Directive 2019/520 is not implemented in Switzerland.
- Eurovignette Directive 2022/362 (including CO<sub>2</sub> based tolling) is not implemented in Switzerland, CO<sub>2</sub>-dependent tariffication is not expected before 2030.
- The connection to EUCARIS Toll-EETS is not possible as Switzerland has not adopted the EETS Directive 2019/520.
- No changes in the EETS Domain Statement as well as in the tolling regulations.
- Legal basis for EETS in Switzerland: Schwerverkehrsabgabegesetz (SVAG; [SR 641.81](#)) / Schwerverkehrsabgabeverordnung (SVAV; [SR 641.811](#)).

#### 4.6.5 EETS market development

More than 90% of journeys carried out by foreign vehicles are charged via EETS. As a result of TotalEnergies' accreditation before end of 2025, the FOCBS expects that their fuel card users will migrate from the manual service NMTS to EETS, thereby further increasing the EETS share.

On the other hand, the proportion of domestic vehicles (CH/LI) using EETS under LSVA III is, as expected, low, at just under 2% of the vehicles subject to charge.

#### 4.6.6 Outlook for the next 12 Months

- tolltickets approval

#### 4.6.7 Other Issues and Developments

The opening of the national service to accredited providers alongside the mandated national provider has been a complete success. Approximately 20% of national NETS users have opted for an accredited provider, from which they usually already obtain services other than toll services.

In parallel with NATRAS, the following providers have already passed the NETS accreditation process by the end of 2025 and are approved to provide the national service NETS:

- adnexo GmbH
- EPS Software Engineering AG
- LOSTnFOUND AG
- Mapon AS (CH: mibleObjects GmbH)
- Mobatime AG
- Samsara
- TIS GmbH
- Traceon AG
- Traconiq AG
- Xmatik AG

Further providers are currently undergoing the accreditation process.

## 4.7 DARS / Slovenia

### 4.7.1 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Telepass S.p.A.	In unlimited production operation	1.2.2024
Toll4Europe GmbH	In unlimited production operation	1.8.2024
Toll Tickets GmbH	In accreditation	Unlimited production planned for Q3 2026

### 4.7.2 List of accredited OBU of EP/SP

Name of EP/SP	OBUs Manufacturer/Type	Phase
Telepass S.p.A.	Telepass/ETOLLK1TL	In unlimited production operation
Toll4Europe GmbH	Siemens/Sitraffic Sensus Unit C3080	In unlimited production operation
Toll4Europe GmbH	Norbit VTP-1425	In finalization of pilot phase

### 4.7.3 Legal and contractual status

- Implementation of EETS Directive 2019/520/EU: the legislation was aligned with EETS Directive 2019/520/EU in November 2020.

- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling): the legislation was aligned with EETS Directive 2022/362/EU in December 2024. The Tolling Act entered into force on 18. 12. 2024.
- Update on EETS Domain Statements and tolling regulations: Toll domain statement is harmonized with EETS directive. Changes for CO<sub>2</sub> based tolling have been included in Toll Domain Statement version 4 which was published on 24. 10. 2025.
- With 1. 11. 2025 we successfully introduced CO<sub>2</sub> emission classes for toll charging in DarsGo system based on Directive (EU) 2022/362 and have concluded 9 months project. Customer selfcare portal with new functionalities has been available already on 6. 10. 2025. First invoicing period after the upgrade shows no issues with new CO<sub>2</sub> differentiation so based on that we can confirm that the upgrade was successful including EETS services.
- Update on EUCARIS: DARS enforcement system for vehicles up to 3.5T is connected to the EUCARIS system. For vehicles over 3.5T and for the Karavanke tunnel system is connected to the EUCARIS system for offence procedures (via Toll Offence application).

#### 4.7.4 EETS market development

In DarsGo domain there are two TSPs accredited in full production use with three different OBUs, the third TSP is in implementation phase. The share of transactions from EETS users compared to DarsGo transactions is growing during the period from the implementation of EETS services.

#### 4.7.5 Outlook for the next 12 Months

- Expected accreditations:
  - Finalizing the pilot phase with T4E (and switch to unlimited production phase) for NORBIT VTP-1425 (expected in Q2 2026).
  - Finalizing the accreditation with 3<sup>rd</sup> TSP – Toll Tickets GmbH (unlimited production phase expected in Q3 2026).

#### 4.7.6 Other Issues and Developments

- For 2026 it is planned that the new DARS data exchange hub will be established for EETS with purpose of replacing the current EasyGo Hub solution (migration of all certified EETS partners in DarsGo system is planned to be concluded latest till the end of Q1 2027).
- Technical solution will be like ASFINAG and will be based on EIS - EasyGo interface specification.

## 4.8 HELLASTRON / Greece

### 4.8.1 Name of National Provider/Issuer OBUs

No National Provider

### 4.8.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
N / A	N / A	N / A

### 4.8.3 List of accredited OBU of EP/SP

N/A

### 4.8.4 Legal and contractual status

- EETS Directive 2019/520/EU has been transposed in Greek Legislation with Presidential Decree 96 of 2021 (27 Nov. 2021)
- Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling) has been transposed to Greek Legislation with Presidential Decree 104 of 2025 (5 Dec. 2025)

### 4.8.5 EETS market development

- No EETS Providers Operate in Greece

### 4.8.6 Outlook for the next 12 Months

- N/A

### 4.8.7 Other Issues and Developments

- The expansion of Olympia Odos motorway (connecting today Athens to Pyrgos in Peloponnese via Patras) with the 75 km new section of Patras to Pyrgos in the western Peloponnese, was completed and fully commenced operation on Dec. 4<sup>th</sup> 2025. Thanks to the integration of Patras-Pyrgos Motorway in the Concession Project, Olympia Odos becomes the third longest motorway in operation in Greece, with a total length of 277 km.  
For more information, visit <https://www.olympiaodos.gr/>

- E65 (Central Greece Motorway) construction is planned for completion within 2026, with the connection to Egnatia Odos towards the north via the last 70,5 km section currently under construction. For more information, visit <https://www.kentrikiodos.gr/highways/information/?lang=en>
- Egnatia Odos motorway in northern Greece, the last state operated and the longest (877 km) motorway in Greece, officially commenced operation under the Concessionaire "Nea Egnatia Odos Concession S.A." (consortium between the GEK TERNA and Egis Projects) on Dec. 31<sup>st</sup> 2025. The concession agreement has a duration of 35 years, with the Concessionaire undertaking the operation, maintenance exploitation, and significant investments towards the modernization of the motorway that was constructed between 1995 and 2014. For more information, visit <https://neodos.gr/>
- The concession for North Road Axis of Crete, a new 157km motorway to be constructed on the island of Crete under the concession model, is expected to commence in early 2026, under the concessionaire "Diktaion Concession", by GEK TERNA. In terms of electronic toll collection, the new motorway will be interoperable with the other existing Greek motorways, and will be compliant with EU Directive 2019/520 (EETS Directive). For more information, visit <https://www.gekterna.com/motorway/?lang=en>

## 4.9 National Revenue Administration (KAS) / Poland

### 4.9.1 E-Toll

### 4.9.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Telepass	In operation	17.10.2022
Toll4 Europe	In operation	1.08.2024
Data System	In accreditation	
Eurowag	In accreditation	

### 4.9.3 List of accredited OBU of EP/SP

Telepass:

- Arianna 2 - Autostrade Tech S.p.A.
- K1 - Telepass S.p.A.

Toll4Europe:

- Sitraffic Sensus Unit C3080
- Norbit VTP-1425

### 4.9.4 Legal and contractual status

- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling)

Ministry of Infrastructure is responsible for implementation of Eurovignette Directive.

28th October 2024 Committee for Programming the Government's Work accepted the draft legislation implementing the directive 1999/62 and launch the government legislative process.

The project was assigned the number UC74 and is publicly available on the government website:

<https://legislacja.rcl.gov.pl/projekt/12392002/katalog/13097044#13097044>

The project is only available in Polish. From 28th November 2024 the inter-ministerial arrangements and public consultations devoted to the project have been carried out.

These consultations are not yet complete. The legislative process is expected to proceed to the next stage in the first quarter of 2026.

### 4.9.5 EETS market development

Although no new EETS providers were launched in Poland in 2025, the EETS market in Poland continues to develop in technical terms, as well as through the maintenance and implementation of new technical solutions and adaptation to horizontal changes. In 2026, further accreditations (two) and further development of the service are expected. In the 3Q of 2025, an agreement was signed with a new EETS provider, Data System, and the technical and commercial concept for the provision of services presented by Eurowag was approved. The agreement between the NRA and Eurowag is currently being finalized prior to signing.

## 4.9.6 Outlook for the next 12 Months

For the next 12 months we are planning:

- 1) Expected accreditations:
  - Data System – accreditation tests to begin in Q1 2026.
  - EUROWAG – agreement to be signed in Q1 2026 and accreditation tests to begin at the end of Q2 2026.
- 2) changes in the area of toll collection:

From 1 February 2026, on the basis of the *Regulation of the Council of Ministers changing the regulation on national roads or sections thereof on which electronic tolls are collected, and the rates of electronic tolls*, the following changes will be implemented in the toll road network:

- the toll road network in Poland will be extended by 645 km. After this extension, the total toll road network in Poland will be approximately 5,870 km.
- the rates of electronic tolls will change (increased).

## 4.10 NDS / Slovakia

### 4.10.1 Národná diaľničná spoločnosť, a.s., Slovakia

National toll system Operator      SkyToll, a.s.

### 4.10.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Telepass S.p.A.	In operation	15/03/2024
Toll4Europe GmbH	In operation	15/03/2024
ITIS Holding a.s.	In operation	15/03/2024
W.A.G. Payment solutions a.s.	In operation	15/03/2024

#### **4.10.3 List of accredited OBU of EP/SP**

ITIS Holding a.s.

Billien OBU 5050

Telepass S.p.A.

Telepass ETOLLK1TL

Autostrade tech S.p.A ETOLL2ST

Toll4Europe GmbH

Sitraffic Sensus Unit C3080

W.A.G. Payment solutions a.s.

OBU U850 Cortex M4

#### **4.10.4 Legal and contractual status**

- Implementation of EETS Directive 2019/520/EU
  - Implemented, and since 15 March 2024 in operation.
- Implementation of the Eurovignette Directive 2022/362/EU (including CO2-based tolling).
  - Implemented, and since 1 July 2025 in operation.
- Update on EETS Domain Statements and tolling regulations.
  - Last update covering the implementation of the CO2 tolling was on 1 July 2025, currently no major changes are expected.

#### **4.10.5 EETS market development**

Since 15 March 2024, the share of toll collected via EETS has progressively increased to the current value for the 4th quarter of 2025, which is approximately 52% of the total toll collection in the Slovak Republic.

#### **4.10.6 Outlook for the next 12 Months**

- Finalizing the ongoing accreditation process of new OBE from Toll4Europe - Norbit, which started in 2025.
- Start of accreditation process with AS 24 as a new applicant for the provision of EETS in Slovakia – documentation and testing.

- Preparation to launch new National Toll System, including a new EETS Interface, from 1 January 2027, with an impact on EETS Providers within the first half of 2027 - switch to the new EETS interface.

#### **4.10.7 Other Issues and Developments**

N/A

### **4.11 National Toll Payment Service Plc / Hungary**

#### **4.11.1 Name of National Provider/Issuer OBUs**

National Toll Payment Service Plc

#### **4.11.2 EP/SP in Operation**

There are no EP/SPs in operation in accordance with the EETS directive.

#### **4.11.3 List of accredited OBU of EP/SP**

There are no EP/SPs OBU in operation.

#### **4.11.4 Legal and contractual status**

- Toll collection and road operation functions are being merged into one state-owned organization starting 1 January 2026. This means that the tasks of collecting tolls and managing the toll system are now part of Magyar Közút Nonprofit Zrt. (Hungarian Public Roads Nonprofit Ltd.).
- Historic heavy vehicles exempted (over 3.5 t with museum/“OT” plate): they will be toll-free for HU-GO tolls from 1 January 2026, once they are registered in a special exemption registry.
- From 1 January 2026, all RVs/motorhomes (especially those with maximum authorized mass over 3.5 t) will no longer use the distance-based HU-GO toll system (e-toll with on-board unit or route ticket) for toll roads in Hungary. Instead, they must use the *e-vignette (time-based)* system like passenger cars do. That means buying an e-vignette before using motorways and main toll roads. (Act LXVII of 2013 on Distance-Based Tolls Payable for the Use of Motorways, Expressways and Main Roads)
- Infrastructure charges will be raised by the inflation rate (4,3%) on January 1, 2026. (46/2025. (XII. 23.) ÉKM of the Minister of Construction and Transport on the amendment of certain ministerial decrees on toll payment)

- Gov. Decree No. 375/2025 (XI. 30.) increases the amount of the fine to be imposed for offences under Section 14(a), (b) and (c) of the ED Act for vehicle categories J2, J3, J4 and J5 in the case of unauthorized road use in the case of detection in the first time band.
- The General Terms and Conditions for specific contracts applicable to entities providing European Electronic Toll Services and the Domain Statement were also updated from 1. January 2026.

#### **4.11.5 EETS market development**

There are no registered EETS provider.

#### **4.11.6 Outlook for the next 12 Months**

- Infrastructure charges for main roads will be raised by an additional 35% (based on the charges on 2025.12.31.) on March 1, 2026. (46/2025. (XII. 23.) ÉKM of the Minister of Construction and Transport on the amendment of certain ministerial decrees on toll payment)
- External-cost charges remain unchanged.

#### **4.11.7 Other Issues and Developments**

N/A

### **4.12 Øresundsbron / Sweden**

#### **4.12.1 Name of National Provider/Issuer OBUs**

N/A

#### **4.12.2 EP/SP in Operation**

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

<b>Name of EP/SP</b>	<b>Status (in accreditation / in operation)</b>	<b>Start of operation (if applicable)</b>
Brobizz	In operation	
ØresundPAY	In operation	
Total/AS24	In operation	
Axxès	In operation	
SkyttelPASS	In operation	

Autosync	In operation	
Flyt	In operation	
DKV	In operation	
Toll4Europe	In operation	
Tolltickets	In operation	
Eurowag	In operation	
UnipolTech	Approved but not in operation	

#### 4.12.3 List of accredited OBU of EP/SP

Kapsch	TRP-4010-00A
Kapsch	TRP-4040-00A
Kapsch	OBU-5310-22A
Kapsch	TS3203/10B
Norbit	VTR850
Norbit	VTP-1425
Q-Free	OBE6154
Yunex (Siemens)	C3081
Yunex (Siemens)	C3077
Yunex (Siemens)	C3080
Telepass	ETOLLK1TL (K1)
Telepass	ETOLL2ST (SAT1)

#### 4.12.4 Legal and contractual status

N/A

#### 4.12.5 EETS market development

No major changes regarding market shares.

## 4.12.6 Outlook for the next 12 Months

New EETS Providers have expressed interest in collaboration. Due to the transition from the EasyGo HUB to bilateral APIs, operations are not expected to commence before 2027 at the earliest.

## 4.12.7 Other Issues and Developments

N/A

## 4.13 RDW / Netherlands

### 4.13.1 E-TOL - [www.e-tol.nl](http://www.e-tol.nl)

### 4.13.2 EP/SP in Operation for e-TOL / Blankenburg tunnel

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
National service provider: Move IZI	In Operation	7 <sup>th</sup> dec 2024
24Toll	In Operation	7 <sup>th</sup> dec 2024
Flitsmeister/Be Mobile	In Operation	7 <sup>th</sup> dec 2024

The accredited ETS-providers are continuously working on expanding their connections with business partners such as MSTs, Maut1, ANWB and possibly also EETS-SPs etc. Also these partners are mentioned on the website of e-tol:

### Partners of Providers

Some providers have partners that offer automatic toll payment services.

- 4411
 

For private individuals and business customers. More info and registration: [4411.be](http://4411.be).
- Maut1
 

For private individuals and business customers. More info and registration: [maut1.de](http://maut1.de).
- MSTs Tolls
 

For business customers. More info and registration: [mststolls.com](http://mststolls.com).
- Travelcard.nl
 

For business customers. More info and registration: [travelcard.nl](http://travelcard.nl).

#### **4.13.3 List of accredited OBU of EP/SP**

N/A (the scheme is ANPR-only)

#### **4.13.4 Legal and contractual status**

- Implementation of EETS Directive 2019/520/EU
- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling)
- Update on EETS Domain Statements and tolling regulations

There was the recent processing of the annual indexation of the tolltariffs. Furthermore since the start of the scheme users (who were not paying through a service provider) were not charged the regular €9.00 administration fees when receiving a payment reminder. From December 2025 the regular fee is applicable. This received media-attention.

#### **4.13.5 EETS market development**

No EETS SPs accredited yet. They could however (also) connect through the platforms of the already accredited SPs.

#### **4.13.6 Outlook for the next 12 Months**

No fundamental changes expected.

#### **4.13.7 Other Issues and Developments**

N/A

### **4.14 [Netherlands / RDW] Truck Toll – [www.trucktol.nl](http://www.trucktol.nl)**

#### **4.14.1 EP/SP in Operation for HGVC**

The following EETS SPs have signed contracts with the Toll Charger(s). Their status is as follows:

(see also [www.trucktol.nl](http://www.trucktol.nl) )

EETS provider	EETS agreement signed	Test phase A	Test phase B	Test phase C	Proof of accreditation
↗ <a href="#">Toll4Europe</a>	Yes, 03/03/2025	In progress	In progress	Pending	Not available
↗ <a href="#">Telepass</a>	Yes, 13/03/2025	In progress	In progress	Pending	Not available
↗ <a href="#">Axxès</a>	Yes, 01/05/2025	In progress	In progress	Pending	Not available
↗ <a href="#">AS24 affiliate of TotalEnergies</a>	Yes, 06/05/2025	In progress	Finalised	In progress	Not available
↗ <a href="#">Tolltickets</a>	Yes, 09/10/2025	In progress	In progress	Pending	Not available
↗ <a href="#">Eurowag</a>	Yes, 05/12/2025	In progress	Pending	Pending	Not available

#### 4.14.2 List of accredited OBU of EP/SP

N/A (process of accreditation pending for all EETS SPs mentioned)

#### 4.14.3 Legal and contractual status

- Implementation of EETS Directive 2019/520/EU
- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling)
- Update on EETS Domain Statements and tolling regulations

➤ Height of the fines is published, to be found here: [Staatscourant 2026, 1089 | Overheid.nl > Officiële bekendmakingen](#) .

Next to the height of the fines, the following is important as part of the enforcement setup:

- A maximum number of 1 fine per 24h will be issued
- In case of multiple, distinctive offenses within **24** hours, the offense carrying the highest fine will be penalized.

- The first 6 months will be a grace period in the sense that the amount of the fines is reduced by 50%. After those 6 months it will be the regular 100%.
- The general enforcement plan will be made publicly available in the coming weeks.

**Abstract:**

Grondslag	Overtreding (art. 13, eerste lid, van de wet)	Boetebedrag
Art. 4, tweede lid, aanhef en onder a, van de wet	De boordapparatuur van een vrachtwagen werkt niet naar behoren tijdens het rijden over de weg.	€ 500,00
Art. 4, tweede lid, aanhef en onder b, van de wet	De boordapparatuur van een vrachtwagen is tijdens het rijden over de weg niet ingeschakeld.	€ 500,00
Art. 4, tweede lid, aanhef en onder c, van de wet	Tijdens het rijden over de weg blijkt de boordapparatuur van een vrachtwagen niet te horen bij de vrachtwagen waarvoor een geldige dienstverleningsovereenkomst is gesloten.	€ 500,00
Art. 8, eerste lid, van de wet	De houder van een vrachtwagen die op de weg rijdt heeft geen geldige dienstverleningsovereenkomst voor deze vrachtwagen afgesloten, en de houder heeft geen vrijstelling of ontheffing als bedoeld in artikel 3, eerste of tweede lid, van de wet.	€ 800,00

- Letter from Minister dating the 10th December 2025 to parliament confirming go live date set to 1st of July 2026 and providing information on the progress of the realization of TruckToll: [7e voortgangsbrief invoering vrachtwagenheffing | Kamerstuk | Rijksoverheid.nl](https://www.rijksoverheid.nl/voortgangsbrief-invoering-vrachtwagenheffing)
- On November 18 2025 the legislative proposal for the Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling) was adopted by the Dutch Senate. Now that the adoption of the legislative proposal by parliament has been completed, the rates for the truckToll that had already been made public (as proposed rates) are final.

#### 4.14.4 EETS market development

No EETS SPs accredited yet. Progress according to plan. RDW trusts the EETS SPs to be ready before the 1<sup>st</sup> of July.

RDW has done company visits to the EETS SPs; last ones to be visited in Q1 2026.

#### 4.14.5 Outlook for the next 12 Months

No significant items here other then focus on go live on the 1st of July.

#### 4.14.6 Other Issues and Developments

- General: after the elections in 2025 there are now three parties (center-rightwing) in the process of government formation.
- All Dutch Users who are under the obligation for HGVC received a letter from RDW to inform them about the upcoming charge and the importance to be ready timely.

### 4.15 Ředitelství silnic a dálnic s. p. (ŘSD) / Czech Republic

#### 4.15.1 Name of National Provider/Issuer OBUs

National provider = consortium of:

**CzechToll s.r.o.**

Argentinská 1610/4, Holešovice, 170 00 Praha 7, Czech Republic

ID: 06315160, VAT ID: CZ06315160

and

**SkyToll, a.s.**

Lamačská cesta 3/B, 841 04 Bratislava, Slovak Republic

ID: 44 500 734, VAT ID: 2022712153 / SK2022712153

National OBU provided by CzechToll:

Billien OBU 5051

#### 4.15.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
W.A.G. payment solutions, a.s. (Eurowag)	<b>in operation</b>	Jan 9, 2023
ITIS holding a.s. (ITIS)	<b>on hold</b> since March 2025	Mar 1, 2023
Telepass S.p.A.	<b>in operation</b> (EETS Contract signed & executed as of 4 <sup>th</sup> October 2024)	Oct 31, 2025
Toll4Europe GmbH.	<b>in operation</b>	Sep 19, 2025

	(EETS Contract signed & executed as of 24 <sup>th</sup> March 2025)	
TotalEnergies SAS & Axxès SAS	potentially <b>in accreditation</b> NDA signed (both)	

#### 4.15.3 List of accredited OBU of EP/SP

- Eurowag - EW OBU (U850)
- ITIS - Billien OBU 5050
- Toll4Europe – Siemens C3080 (Yunex), Norbit VTP-1425
- Telepass – Telepass SAT K1

#### 4.15.4 Legal and contractual status

- Implementation of EETS Directive 2019/520/EU
  - **Implemented.**
- Implementation of Eurovignette Directive 2022/362/EU (including CO<sub>2</sub> based tolling)
  - **Implemented - CO<sub>2</sub> based tolling in operation since Mar 1, 2024.**

**Re CO2:**

- **(EU) 2019/1242 – fully implemented**
- **(EU) 2024/1610 - being evaluated, some inputs expected from the EU (especially reference values for new vehicle subgroups).**
- Update on EETS Domain Statements and tolling regulations
  - **EETS Domain Statement - no change expected in near future**
- Update on EUCARIS
  - **Some modules implemented and being used (for example CBE, PRÜM, RE-SPER, ERRU, eCALL, VAT),**
  - **Some are being implemented (for example finalization (the second way) of TOLL/eETS).**

## 4.15.5 Outlook for the next 12 Months

- Expected accreditations
  - **TotalEnergies – 1<sup>st</sup> phase in progress.**
- Relevant changes in toll domain (e.g. new tariff scheme, rules for electric vehicles, enforcement...)
  - **New Toll Tariffs (no structural change, just values) - Update of toll rates for 2026 (no impact on EETS, valuation is carried out by NPS).**
  - **Remuneration Scheme for EETS Providers within the CZ Domain (2026): 2.36%**

## 4.15.6 Other Issues and Developments

N/A

## 4.16 SEOPAN / Spain

No report was sent to the EFP Secretariat.

## 4.17 Sund & Bælt / Denmark

Denmark has two Toll Domains. The first one is the Storebælt Bridge operated by A/S Storebælt under Sund & Bælt which is a DSRC, barrier-based domain.

The second is KmToll, a GNSS-based Toll Domain operated by Sund & Bælt Holding A/S on behalf of the Danish Ministry of Taxation, encompassing appr. 10.900 km of the Danish road network), thus making the toll a tax which accrues to the Danish state.

### 4.17.1 Name of National Provider/Issuer OBUs

There is only one issuer of OBE's in Denmark – Brobizz A/S which has the status as EETS Provider.

There is no appointed national issuer in Denmark.

## 4.17.2 EP/SP in Operation, Storebælt

The following EP/SP have signed contracts with A/S Storebælt as Toll Charger on the Storebælt Toll Domain. Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)	EETS Domain
Telepass*	In operation	2017	Storebælt
DKV	In operation	2017	Storebælt
Total Energies / AS 24	In operation	2020	Storebælt
ØresundPAY	In operation	2021	Storebælt
Brobizz A/S	In operation	2016	Storebælt
Fremtind Service AS	In operation	2021	Storebælt
SkyttelPASS AS	In operation	2021	Storebælt
Axxés	In operation	2022	Storebælt
W.A.G. payment solutions, a.s.	In operation	2023	Storebælt
tolltickets GmbH	In Operation	2022	Storebælt
Toll4Europe GmbH	In Operation	2022	Storebælt
Flyt AS	In operation	2023	Storebælt
Unipoltech	In accreditation	3 <sup>rd</sup> quarter 2026	Storebælt

\*As subcontractor via SkyttelPASS AS

## 4.17.3 List of accredited OBU of EP/SP, Storebælt

The following EP/SP OBU's are in operation for Storebælt. (Only DSRC 15509).

- Kapsch - 4201 01 K, OBU-4040-00A, OBU-5310-00A, 5310-22A and OBU-4010-21B
- Autostrada Tech TLPOM03-HE, ETOLL2ST-1HEB V2 (Arianna 2) and ETOLLK1TL
- Siemens C3077, C3080
- Q-free OBU615
- Norbit VTR850, VTM 475

## 4.17.4 Legal and contractual status, Storebælt

- The Danish implementation of the EETS Directive 2019/520/EU has been carried out with "BEK nr. 1379 af 04/12/2024".
- Storebælt will update the EETS Domain Statement ultimo Q1 including the new specifications.
- EUCARIS has been in use since 1st quarter 2023 on the Storebælt Toll Domain.

## 4.17.5 Outlook for the next 12 Months

For Storebælt:

- Storebælt have informed all EETS Providers they have an agreement with about the decision to replace the current communication procedures, which utilize the centralized data exchange platform EasyGo HUB, with peer-to-peer communication between EasyGo Toll Chargers and EETS Providers no later than 1. Quarter 2028. This change aligns with the standards ISO 12855 and EN 16986 in their up-coming versions. January 14<sup>th</sup>, 2026, version 1.2 of the EasyGo interface specification (EIS) has been issued to all connected EETS providers. EIS version 1.2 is so stable that it can be used for developing specifications for the new solution. As we do not foresee major change when 16986 is approved, we expect to establish a plan for replacement during Q2 and Q3.
- As a consequence of the replacement no new EETS provider is expected to be accredited during 2026.

## 4.17.6 EP/SP in Operation, KmToll

The following EP/SP have signed contracts with Sund & Bælt Holding A/S as Toll Charger on the Danish KmToll domain. Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)	EETS Domain
BroBizz A/S	In operation	1 Jan. 2025	KmToll
Telepass	In operation	1 Jan. 2025	KmToll
ØresundPAY	In operation	1 Jan. 2025	KmToll
SkyttelPASS AS*	In operation	1 Jan. 2025	KmToll

\*As subcontractor via Telepass

## 4.17.7 List of accredited OBU of EP/SP, KmToll

The following EP/SP OBU's are in operation for KmToll.

- Kapsch 5310-22A
- Autotrade Tech ETOLL2ST-1HEB V2 (Arianna 2)
- Telepass ETOLLK1TL
- Brobizz Toll App (Neology GNSS tolling app for IOS)

#### 4.17.8 Legal and contractual status, KmToll

- The Danish implementation of the EETS Directive 2019/520/EU has been updated where “BEK nr. 1863 af 27. September 2021” has been replaced by “BEK nr. 1379 af 04/12/2024”.
- Implementation of Euro-vignette Directive 2022/362/EU (including CO2 based tolling) has been introduced with KmToll entering into force on 1 January 2025
- Update on EETS Domain Statements and tolling regulations. The EETS Domain Statement for KmToll has been updated on 7 November 2025.

#### 4.17.9 Outlook for the next 12 Months, KmToll

For the Danish KmToll Scheme:

- The application process for the next accreditation round has expired on 15 December.
- We expect a bill to be passed by parliament for expanding the scheme to include HGV above 3,5 tonnes starting 1 January 2027.

#### 4.17.10 Other Issues and Developments

N/A

### 4.18 Via Lietuva / Lithuania

#### 4.18.1 Name of National Provider/Issuer OBUs

AB “Via Lietuva” shall be operating as the main service provider, when the e-tolling starts operating.

#### 4.18.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
-	-	-

#### 4.18.3 List of accredited OBU of EP/SP

No e-tolling system in operation.

#### 4.18.4 Legal and contractual status

The amendments to law were made implementing the Directive 2022/362/EU and establishing toll rates based on infrastructure costs and CO2 emissions, when e-tolling system starts operating. The Government of the Republic of Lithuania adopted the methodology for setting toll rates on December 3, 2025.

#### 4.18.5 EETS market development

No e-tolling system in operation.

#### 4.18.6 Outlook for the next 12 Months

It is established by the law that the e-tolling system shall start to operate on January 1, 2027. According to the decision of the government of the Republic of Lithuania, Lithuanian Transport Safety Administration (LTSA) shall approve the toll rates till June 30, 2026. LTSA shall set the rates based on the methodology for setting toll rates.

#### 4.18.7 Other Issues and Developments

N/A

### 4.19 Viapass / Belgium

#### 4.19.1 Name of National Provider/Issuer OBUs

Satellie NV

#### 4.19.2 EP/SP in Operation

The following EP/SP have signed contracts with the Toll Charger(s). Their status is as follows:

Name of EP/SP	Status (in accreditation / in operation)	Start of operation (if applicable)
Axxès	In operation	01/04/2016
Eurotoll	Stopped operations	2017
TotalEnergies Marketing Service	In operation	2017
Telepass	In operation	2018
Toll4Europe	In operation	2018
EuroWAG	In operation	2022
Toll Tickets	In accreditation	N/A

### 4.19.3 List of accredited OBU of EP/SP

Provider	Manufacturer	OBUs
Satellic	Continental	1372
Axxès	Yunex	C3081
EuroWAG	Prinzip	U850
Telepass	Autostrade	Ariana 2
	Telepass	K1
Toll4Europe	Yunex	C3080
	Norbit	VTP-1425
Toll Tickets	Kapsch	5310-00A/22A
TotalEnergies Marketing Services	Yunex	C3077
	Yunex	C3081

### 4.19.4 Legal and contractual status

Viapass presented new Data Processor Agreements with all SP (EETS and National) under the format as foreseen by the EU model (GDPR). The legal framework needs to be adapted in 2026, to be able to proceed with the implementation of the route ticket, as well as the CO2 Tolling (see further)

### 4.19.5 EETS market development

The EETS providers account for more than two-third of the active On-Board Units on a daily basis, but their market share remained essentially stable over the last 12 months (with only some movements between EETS providers).

### 4.19.6 Outlook for the next 12 Months

- Expected accreditations

Toll Tickets

- Planned re-certifications

We received release notes and requests for certification of new OBU devices from two different accredited EETS providers and we expect that all certification activities will be complete before the end of 2026.

- Relevant changes in toll domain

Implementation of a CO2 tariff scheme as of July 1<sup>st</sup>, 2026, in Flanders. Brussels and Wallonia are expected to follow as of January 1<sup>st</sup>, 2027, but this timeline depends on the completion of the corresponding legal changes in those 2 Regions

#### **4.19.7 Other Issues and Developments**

The contract with our current National Service Provider is nearing completion. Viapass expects to publish the tender(s) for the renewal of the system during the summer of 2026. Anyhow, the tolling sector will be consulted upfront during market consultation previously to publication of the tender.

## 5 EETS Provider / Service Provider: Progress Report

### 5.1 EETS Provider

#### 5.1.1 Axxès SAS

##### 5.1.1.1 Provider status

Name of Company	Status: EETS Provider or Service Provider	Registered as EP since (if applicable), country of registration
Axxès	EETS Provider	21st December 2015, France

##### 5.1.1.2 Toll Domain Coverage

Please describe your current toll domain coverage:

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Austria LKW Maut	Direct	
Belgium PKB	Direct	
Belgium Liefkens-hoek	Direct	
Denmark Oresund	Direct	
Denmark Storebaelt	Direct	
France TIS - PL	Direct	
Germany LkW Maut	Direct	
Hungary	Partner	
Italy SIT-MP	Direct	
Italy SET	Direct	
Poland e-Toll	Partner	
Poland A1	Partner	
Poland A2	Partner	
Poland A4	Partner	
Portugal Viaverde	Partner	
Spain Via-T	Partner	
Switzerland LSVA	Direct	

### 5.1.1.3 OBUs in Operation

Axxès is using Yunex devices for GPS/DSRC embedded functions and Kapsch for only DSRC capabilities.

Manufacturer	Type
Yunex	C3081
Kapsch	4010/20B and older generations

### 5.1.1.4 Outlook for the next 12 Months

- expected accreditations:
  - Czech Republic, Denmark, Netherlands, CeA, Slovakia are in evaluation
  - Germany migration to MED
- planned re-certifications: n/a
- relevant changes: deployment of the 4G C'Moov OBU successfully completed.

### 5.1.1.5 Other Issues and Developments

For the first year since the development of EETS, most resources will be dedicated to updating existing EETS toll domains rather than developing new ones.

- This focus on updates will likely slow down the rollout and expansion of the EETS concept across Europe in the short term.
- Overlapping system rollouts, CO<sub>2</sub>-based tolling, and regulatory changes without a shared timeline could create serious bottlenecks and resource strain - potentially threatening business continuity and slowing EETS development.

## 5.1.2 BroBizz A/S

No report was sent to the EFP Secretariat.

## 5.1.3 DKV EURO SERVICE GmbH & Co. KG

No report was sent to the EFP Secretariat.

## 5.1.4 Øresundsbro Konsortiet/ ØresundPAY

### 5.1.4.1 Provider status

Name of Company	Status:	Registered as EP since, country of registration
Øresundsbro Konsortiet/ØresundPAY	EETS Provider	2020-08-26, Sweden

### 5.1.4.2 Toll Domain Coverage

Please describe your current toll domain coverage:

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Øresundsbron	direct	Sweden
Storebæltsbroen	direct	Denmark
The Danish Kilometer Tolling Scheme	direct	Denmark
AutoPASS	direct	Norway (5 Regional TC and 6 ferry companies)
Asfinag	direct	Austria

### 5.1.4.3 OBUs in Operation

Norbit VTR850-B

Q-free OBU615

Kapsch TRP-4010-00A

Kapsch OBU-4040-00A

Kapsch OBU-5310-22A

### 5.1.4.4 Outlook for the next 12 Months

N/A

### 5.1.4.5 Other Issues and Developments

N/A

## 5.1.5 Pagatelia (Verra Mobility)

No report was sent to the EFP Secretariat.

## 5.1.6 Telepass S.p.A.

### 5.1.6.1 Provider status

Name of Company	Status:	Registered as EP since, country of registration
TELEPASS	EETS Provider	ITALY

### 5.1.6.2 Toll Domain Coverage

Please describe your current toll domain coverage:

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Austria	Direct	Including CO2
Belgium	Direct	
Bulgaria	Partner (National Service)	
Croatia (HAC)	Direct	HV and LV
Czech Republic	Direct	Including CO2
Denmark (Gnss & Bridges)	Direct & Partner (Bridges)	Including CO2 (Gnss network)
France	Direct	HV and LV
Germany	Direct	Including CO2
Hungary	Partner (National Service)	
Italy	Direct (National Service)	HV and LV
Norway	Partner	
Poland (EETS+A4+A1)	Direct	
Portugal	Partner	
Slovak Republic	Direct	Including CO2 (since July 1 <sup>st</sup> , 2025)
Slovenia	Direct	
Spain	Partner	
Sweden	Partner	

Switzerland	Direct	
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#### 5.1.6.3 OBUs in Operation

- DM03 – Movyon (formerly Autotrade Tech)
- DM03-HE – Movyon (formerly Autotrade Tech)
- ETOLL2ST – Movyon (formerly Autotrade Tech)
- TLPV5-HE – Movyon (formerly Autotrade Tech)
- ETOLLK1TL – Telepass
- TLPV5 – Movyon (formerly Autotrade Tech)
- TLPV5.1 – Movyon (formerly Autotrade Tech)
- VTR850-T – Norbit

#### 5.1.6.4 Outlook for the next 12 Months

- expected accreditations:
  - The Netherlands
  - Alsace
  - Slovak Republic (re-certification for the new national toll system that will be introduced without clear timeline).
- relevant changes

#### 5.1.6.5 Other Issues and Developments

##### Czech Republic

- Czech Republic opened to EETS Providers, but remuneration was quite far from standards, and several players were discouraged by submitting application.
- On July 1st, 2024, remuneration was updated, but not yet in line with standards, in addition costs requested by RSD/RMD were raised.
- On January 2<sup>nd</sup>, 2025, remuneration was decreased, effective on January 1<sup>st</sup>, 2025. Only generic explanations, lack of transparency.
- On June 1<sup>st</sup>, 2025, RSD added a new KPI on correctness of OBE parameters with extremely high penalty. It is unclear whether the same KPI is applied to National Toll Service Provider too.
- Since January 1<sup>st</sup>, 2026, remuneration had been slightly moved to 2.36% from previous 2.35%.

## Germany

- The conciliation started in 2025 because of the change in the EETS remuneration that the BALM applied unilaterally from 01.09.2024 was settled.
- By end of 2025 the obligatory introduction of the central map-matching was successfully completed.
- In December 2025 a modification in the law became effective that allows exclusively to the national toll operator Toll Collect to collect the toll with an app. This discriminates all EETS Providers that need to provide an (expensive) OBU with DSRC interface, perform certification tests and respect contractual KPIs. The official launch of the app is planned for January 2026.

## Italy

- The Targa Go video tolling project on the Naples urban motorway remains in a pilot phase; the Italian Ministry of Infrastructure and Transport (MIT) has halted any extension due to technical and EETS-compliance concerns.
- MIT has launched a working group with AISCAT and AETIS to define a national video tolling technology standard aligned with the EU EETS framework; the work is at an early stage.
- The EETS remuneration working group continues, supported by MIT and based on the DG MOVE study.
- Discussions remain open on roadside equipment certification and interoperability issues affecting the Italian motorway network.
- The Eurovignette working group has been put on hold.

## Eurovignette - CO2

As already mentioned in various EFP Working Group Meetings and other occasions, the obligatory introduction of the Eurovignette requirements (CO2 emission classes) in already existing toll domains puts additional costs on EETS Providers (not only for the system/interface modifications but also on operational level). Up to now, only one Toll Charger (Germany) was willing to (at least partially) reimburse accredited EETS Providers. The risk is high that also in upcoming Eurovignette introductions Toll Chargers will not reimburse these costs to accredited EETS Providers, although DG Move recommend that such costs should be reimbursed to EETS Providers in their guidelines released in 2025.

## France

In France the situation is getting more complicated for EETS Providers. Apart from the high number of concessionaires in the TIS-PL (DSRC system), now Alsace (as first region) is introducing

a regional GNSS system (starting in 01/2027). Also, Region Grand Est has the intention to introduce a GNSS system and will officially release the TDS soon.

Assuming that the GNSS systems will not be the same, when an EETS Provider wants to provide a full coverage in France, it must cope not only with the DSRC concessions but – even in the same region – also with (more or less) different GNSS systems.

## 5.1.7 Toll4Europe GmbH

### 5.1.7.1 Provider status

Name of Company	Status:	Registered as EP since, country of registration
Toll4Europe GmbH	EETS Provider	Feb 22, 2017, Germany

### 5.1.7.2 Toll Domain Coverage

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Austria (Asfinag)	direct	
Belgium (Liefkenshoek Tunnel)	partner	
Belgium (Viapass)	direct	
Bulgaria	partner	
Czech Republic	direct	
Denmark (Storebælt)	direct	
France	partner	
Germany (BALM)	direct	
Germany (Herrentunnel)	partner	
Germany (Warnow Crossing)	partner	
Hungary	partner	
Italy	partner	
Poland	direct	
Portugal	partner	
Spain	partner	
Sweden (Øresund)	direct	
Switzerland	direct	
Slovakia	direct	

### 5.1.7.3 OBUs in Operation

Toll4Europe's On Board Units:

- 1) Siemens Sitraffic Sensus Unit C3080
- 2) Norbit VTP-1425

#### 5.1.7.4 Outlook for the next 12 Months

- Enhancement toll domain coverage: certification for NL, DK, Alsace, HR, RO are in evaluation.
- Completing certification of 4G OBU in Q1 2026
- Enhancement and development of service features and VAS ongoing
- Compliance with CO2 regulations based on introduction in EU countries (BE, BG), yearly reclassification

#### 5.1.7.5 Other Issues and Developments

N/A

### 5.1.8 Tolltickets GmbH

#### 5.1.8.1 Provider status

Name of Company	Status:	Registered as EP since, country of registration
tolltickets GmbH	EETS Provider	16.02.2018, Germany

#### 5.1.8.2 Toll Domain Coverage

Please describe your current toll domain coverage:

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Austria	direct	
Hungary	partner	
Bulgaria	partner	
Spain	direct	
Portugal	direct	
Sweden / Denmark Oresund	direct	
Denmark Storebaelt	direct	
Norway	direct	

Germany - BALM	direct	
Germany - Herrentunnel	direct	
Germany - Warnowquerung	direct	
Belgium - Liefkenshoek Tunnel	direct	
Belgium - Viapass	direct	
Switzerland	direct	
Italy	direct	
France	partner	

#### 5.1.8.3 OBUs in Operation

OBUs Type	Manufacturer	Technology
OBU5310	Kapsch TrafficCom AG	Full EETS 2G/4G
TRP4010	Kapsch TrafficCom AG	DSRC

#### 5.1.8.4 Outlook for the next 12 Months

- expected accreditations
  - Slovenia direct (accreditation ongoing)
  - Netherlands direct (accreditation ongoing)
  - Alsace direct (accreditation ongoing)
  - Grand Est direct (accreditation planned)
- planned re-certifications
  - None.
- relevant changes
  - Italy: migration to Aiscat 2.0 interfaces)
  - EasyGo domains Austria, Oresund, Storebaelt: migration to EIS interfaces)

#### 5.1.8.5 Other Issues and Developments

N/A

### 5.1.9 TotalEnergies Marketing Services

No report was sent to the EFP Secretariat.

### 5.1.10 UnipolTech S.p.A.

No report was sent to the EFP Secretariat.

## 5.1.11 W.A.G Payment Solutions a.s. (Eurowag)

### 5.1.11.1 Provider status

Name of Company	Status:	Registered as EP since, country of registration
EUROWAG - W.A.G. payment solutions a.s.	EETS Provider	February 16, 2017, Czech Republic

### 5.1.11.2 Toll Domain Coverage

Please describe your current toll domain coverage:

Toll Domain	Contract type (direct with TC / through partners)	Additional comments (if relevant)
Germany	direct	
Belgium	direct	
Austria	direct	
Sweden	direct	Oresund bridge
Denmark	direct	Storebaelt bridge
Slovakia	direct	
Czech Republic	direct	
Switzerland	direct	
Hungary	partner	
Bulgaria	partner	
Spain	partner	
Portugal	partner	
PL eToll	partner	
PL Private highways	partner	

### 5.1.11.3 OBUs in Operation

OBE U850

Manufacturer: Princip

#### 5.1.11.4 Outlook for the next 12 Months

- expected accreditations
  - EETS Poland
  - EETS Netherlands
- New EW OBU 2.0 introduction

#### 5.1.11.5 Other Issues and Developments

- Switch to EUR currency in Bulgaria 1 January 2026
- CO2 implementation in Bulgaria
- CO2 implementation in Belgium (1st phase)
- EasyGoHub decommissioning in Austria, Denmark and Sweden