



**Infrastructure**

# Working group approach and governance



Workstream 2.2  
Infrastructure



**CONDOR**  
zero emission inland shipping

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# 1. Introduction and objective

Based on our analysis, as described in the Plan of Action Infrastructure and earlier studies, the transition to zero-emission inland shipping requires a system approach. Many barriers to scaling up arise at the intersection of market, government and financing, and require structured collaboration. Condor therefore proposes an execution-oriented approach that facilitates the step from insight to investment decisions.

To support this, Condor has developed a working group structure. Through the **operational working groups**, we work concretely towards investment ready infrastructure, while in the **validation group** we address overarching themes that need to be solved collectively, such as policy, regulation and standards. The central question throughout is how to move from individual projects to scalable infrastructure.



# 2. Structure of the working group approach

Infrastructure development for zero-emission inland shipping requires simultaneous attention to system conditions and concrete locations. In practice, these two levels are often mixed. Policy-related conditions such as grid capacity, permitting and subsidy schemes are discussed in broad forums, while individual projects struggle with specific technical, financial and organisational questions. As a result, system issues remain at an abstract level and projects at location level stall without structural solutions. This slows down the transition.

Condor therefore works with a two-level working group structure that connects project development and system conditions: operational working groups per location or corridor, and a strategic validation group.

**Operational working groups per selected location or corridor:**  
The working groups focus on the development of individual locations, including demand aggregation, business cases, financing and decision-making.

**A strategic validation group (Working Group Investable Infrastructure):**  
The validation group focuses on the breadth of the system: policy frameworks, system conditions, public instruments and alignment. This is where coherence is organised.



## 3. Operational working groups

*The steps below form the starting point but can be adapted per case.*

1. Problem definition – We identify the specific bottleneck that is preventing the location from progressing. A clear distinction is made between technical constraints and risks arising from market or financing uncertainty.
2. Demand aggregation – We translate concrete demand into volumes, usage profiles and contract duration. The aim is to create utilisation certainty that matches the requirements of financiers and investors.
3. Further development of business cases – We develop an integrated business model in which investment costs, operational costs, utilisation rates and revenues are set out transparently. The business case is tested for robustness through scenario analysis and sensitivity analysis, including energy price, utilisation and subsidy dependency.
4. Financing structure – We explore suitable financing structures, including the possible use of public instruments such as the SPUK scheme.
5. Next steps – Based on the developed business case and financing structure, an explicit investment decision is prepared. The aim is clarity: either proceed towards realisation with commitments in place, or reorient based on transparent arguments.

### Relationship with the SPUK scheme and public instruments

Operational working groups may, but do not have to, be linked to the SPUK scheme. In both cases, Condor can play a role in carrying out or supporting feasibility studies, structuring consortia and strengthening bankability.

### Concrete approach per location

Condor aims, through its working group approach, to build on CEH-identified locations and develop them into concrete investment decisions. Each case working group focuses on one specific location or cluster of locations. The objective is always to arrive at a investment ready business case or, where relevant, a clear go/no-go decision.

The composition of participating companies differs per location and is pragmatic: only those parties needed to move the project forward are involved. Participants are parties with a direct interest in the location, including but not limited to:

- Ports and terminals
- Vessel owners and logistics service providers
- Energy companies or operators
- Financiers
- Relevant public authorities



## 4. Validation group

At strategic level, a validation group is established. The purpose of this group is to guide the prioritisation of locations, ensure alignment with policy and regulation, and improve coordination between public instruments and market initiatives. The validation group acts as a sounding board and sparring partner for Condor. Participants validate the insights emerging from the operational working groups and advise the Condor project leadership.

The validation group is the place where system issues are discussed that are critical to the success of investment cases, such as permitting procedures, grid capacity, subsidy schemes and standardisation. These themes are discussed here at policy and system level; in the operational working groups, standards are also addressed at project level.

Under Condor's lead, this group can engage parties such as the Ministry of Infrastructure and Water Management in these types of system issues. Topics that may be addressed include:

- Prioritisation of locations based on market potential and corridor logic
- Conditions around grid capacity and energy system planning
- Permitting procedures and spatial bottlenecks
- Use and operation of subsidy schemes (including SPUK)
- Standardisation at policy and system level
- Signals from the operational working groups

### **Suggested participants:**

- Public parties – Clean Energy Hubs (CEH), one or two provinces, Rijkswaterstaat, and the Ministry of Infrastructure and Water Management
- Sector-specific parties – VITO, Bestuurlijk Overleg Zeehavens (BoZ), international corridor partners, the Port of Duisburg and the Port of Antwerp

### **Relationship with CEH and the SPUK scheme:**

The validation group builds on the work of CEH and others. It is the overarching forum where locations are brought into development and where the effective use of public instruments – including the SPUK Inland Shipping scheme once published – is discussed.



## 5. Role of Condor

The strength of Condor lies in organising and accelerating. We provide process management, substantive support and collaboration across the chain. Within the working group structure, Condor fulfils a role at two levels.

### At strategic level

- Condor initiates and organises working groups and monitors progress
- Condor safeguards alignment between strategic and operational level
- Condor facilitates knowledge transfer between locations
- Condor addresses system bottlenecks

### At operational level (working groups)

- Condor helps combine public and private instruments
- Condor supports consortium formation
- Condor helps structure analyses and business cases
- Condor monitors progress and prepares decision-making
- Condor translates lessons learned to subsequent locations

*Condor acts as an initiator of infrastructure projects and brings parties together to accelerate realisation. Condor itself does not take investment decisions; responsibility for realisation lies with market parties and public owners.*

## 6. Expected results

The working group approach is aimed at delivering concrete projects and investment decisions as part of a broader systematic roll-out. The objective is to develop locations that are still in an exploratory phase into investment ready projects, step by step. The focus is on realisation. The first phase therefore aims at:

- selection and active development of 2–3 priority locations in the first phase
- at least one location that reaches an investment decision within the programme period
- structural use of public instruments in at least one case
- establishment



