

INE 10 years

# ANNUAL REPORT 2010



Inland Navigation Europe

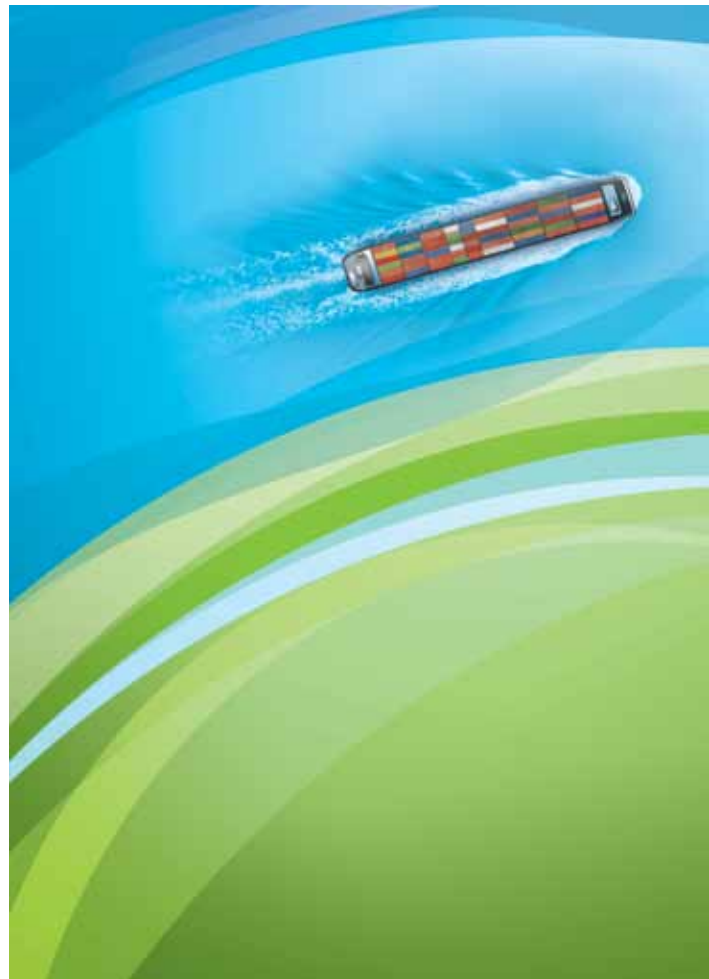
# A changing world

## Long term thinking

Despite the doomsday scenarios in the direct aftermath of the financial crisis, the recovery of the real economy was pretty strong in 2010. There was no better indicator of this than transport volumes which almost picked up to pre-crisis levels again. Nevertheless, uncertainty over the EU economy did not clear up. Transport operation costs are soaring and freight rates have not reached pre-crisis levels again. Moreover, a slight dip after the strong recovery in the first half of the year shows that trade and consequently transport volumes will follow a slower growth path. The Euro crisis may mean a bumpy road forward and the stabilisation of public finances requires austerity and government spending cuts, which is very likely to further undermine growth in the short term. Behind this economic outlook hide fundamental global developments which are changing our world for good.

With the EU2020 strategy, the ageing Union is trying to come to terms with these deep-rooted alterations and places its bets on decarbonisation and resource efficiency for transport. To effectively reach this goal, we cannot afford to lose more time and **INE's vision is straightforward. Low-carbon and congestion free transport growth cannot be realised without the strong involvement of inland waterways in transport and distribution.**

*“Recovery under clouds  
of uncertainty hints  
at a turning point  
for our EU economy and  
way of life”*



## Bold steps are needed

For instance, the long lifetime of infrastructure requires a trend break now if we want to radically change our transport system by 2050. Future-oriented networks rely on an effective quality upgrade and interconnection of the existing “hardware and software” to enable a smart planning and follow-up of freight flows across modes. Efficient physical and data nodes will determine whether transport users and operators can make the modal merge happen to save costs, energy and carbon.



*“A financially sound masterplan must be developed for inland waterway transport to ensure sustainable transport growth for all modes”*

Decarbonisation requires a sound investment climate for innovation of transport and logistics operations. At the same time, a future-oriented network must enable operators to tank and bunker alternative fuels at economic costs. Without a decent distribution network for all modes, it will be hard to generalise renewables in transport. The initial investment costs may be high, but the cost of failing to act will be higher, for jobs and growth in the Union and its competitiveness on the global scene.

Promotion of inland waterway transport will not be enough. Transport growth will stop at the limits of overloaded land infrastructure networks. The inland waterway system is the only existing asset which has free capacity and allows sustainable transport growth. We will need a real Masterplan with financial resources to develop inland waterway transport and to connect it to other modes to ensure seamless flows between ports and their hinterlands and to create continental solution between waterborne city regions.

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**Inland Navigation Europe (INE)** is the European platform of national & regional waterway managers and promotion bureaux, established in 2000 with the support of the European Commission. INE sees major opportunities to contribute to long-term strategies for sustainable transportation by moving more goods by water in EU regions and cities with accessible and navigable rivers and canals. INE is a neutral platform without commercial interests.



# Inland Navigation Europe celebrates its 10 year anniversary



## The start

INE was established in 2000 by 5 bodies entrusted with the promotion of inland waterways in their countries, Bureau Voorlichting Binnenvaart, Promotie Binnenvaart Vlaanderen, Service Public de Wallonie, via donau and Voies navigables de France and opened a Brussels' office in 2001 with the support of the European Commission.

## INE activities

INE was created to promote the use of inland navigation at European level in order to improve the cost-effectiveness and sustainability of transport in Europe. It provides a strong networking platform for its members and actively disseminates information about inland waterway transport. Most essentially, INE lobbies for more effective policy development and implementation to enable inland waterway transport to effectively leverage its place in the supply chain.

While much has been achieved, the work is far from done. INE will continue to actively campaign with its partners for long-term strategies that enable the growth and development of inland waterway transport in EU regions and cities with accessible and navigable rivers and canals.

## INE changes its looks

On the occasion of INE's 10 years anniversary, the organisation is launching a new website focusing even more on concrete information, innovation and testimonials giving a quick overview of the advantages, developments and trends in inland waterway transport. INE also offers its members a brand new members' service via the intranet website providing a timetable for all inland waterway relevant EU initiatives with regular information updates.



## INE's policy priorities established in 2001

1. Measures facilitating more maritime hinterland and continental flows by waterway transport
2. Improve the entire infrastructure system for waterborne logistics: waterways, ports and ITS
3. Strengthen the environmental and safety performance of the fleet and the infrastructure
4. Reduction of red tape and creation of a level playing field to create an attractive business environment
5. Enhance information and networking to foster awareness & cooperation to let people know about the opportunities

## Some of INE's achievements over 10 years

- A dedicated EU waterway transport action plan: Naiades
- Two large waterway projects in the priority list of trans-European networks
- Increased TEN-T co-financing for waterway cross-border projects
- Appointment of EU waterway coordinator
- Harmonised cross-border RIS deployment via framework directive to avoid different technology supports and increased costs
- EU co-financing budget for RIS deployment
- Better access to EU Marco Polo programme for inland waterway transport
- Low-sulphur fuel for waterway vessels



# Our plans for the future

## 1. Growing inland waterway transport cooperation

The cooperation between the main European organisations for inland navigation is growing, resulting in an increasing number of common statements. It is our aim to further strengthen together the voice of inland waterway transport in Europe. The constantly evolving inland navigation sector is to play a key role in enabling congestion-free and sustainable transport growth when land networks are increasingly saturated and public budgets lack to build new infrastructure.



**EBU - European Barge Union:**

*"Inland Waterway Transport has a huge potential which can substantially contribute to the future mobility in Europe. The energy efficiency, cost effectiveness and environmental friendliness of the sector offer numerous possibilities to cope with the challenges ahead. To advocate and to fully exploit these advantages we need a strong positioning in the overall European policy. To make our voice better heard we have successfully worked together in the past on a number of joint issues to benefit the whole industry. We congratulate INE with its 10th anniversary and look forward to a close cooperation in the coming decade."*



**ESO:** *"European policymakers and politicians are becoming increasingly aware of the opportunities inland navigation offers for solving the harmful effects of transport, just by turning them into a sustainable solution. We are very pleased with this result which*

*we were able to achieve in recent years together with INE and EBU. With pleasure we will continue to provide our tribute to keep everyone focused and to ensure an even stronger position of inland navigation in the future. To make this possible no one should forget that in the end it are the entrepreneurs who have to deliver. Together we can and have to make it work.*

*INE, cheers to the next ten years!"*



**INE:** *"Notwithstanding our organisations' different backgrounds, we enjoy actively working together for a common goal: a better use of the existing asset inland waterways for efficient and sustainable transport in Europe.*

*Respecting each other's identity and differences, we will build in the coming years even more on a strong inland waterway transport alliance with a common message to policy makers that inland waterway transport makes the difference in the future transport system."*

## 2. Creating logistics step in

Thanks to our general promotion efforts over the past ten years, we have seen more interest and commitment from industry to exploring and exploiting sustainable options in all areas of their business, including logistics and supply chain management. As part of facilitating this logical next step, we will reach out to interested users and develop specific information packages about how to integrate inland navigation within their supply chains.

## 3. Establishing integrated partnerships

Rivers and canals do much more than transport goods and people. Many different kinds of activities happily co-exist along waterways including regional and environmental development, water supply and flood defence and they support leisure and tourism. This turns waterways into lifelines for the regional economy. INE will be working towards creating strong partnerships for fostering multi-purpose and integrated river landscapes.







# Preparing for the future

## Sustainable thinking

The finite nature of oil reserves, coupled with increasing demand from rapidly developing countries means that the current transport patterns in Europe are unsustainable. There is no space or public acceptance for new infrastructure development, meaning that we need different solutions for congestion. Innovative solutions are not only about technology but also about developing different ways to make transporting goods and people efficient and sustainable.

By 2020, 80 percent of EU citizens will live in congested urban areas. Particularly in the densely populated areas of western Europe, road transport will be at a standstill. There will be no room nor public acceptance for constructing more roads. Those cities which were originally settled along waterways will rediscover this historical advantage and turn an existing asset in their favour. Inbound and outbound goods will be shipped with smart, clean and modular barges along the existing waterways. Multimodal terminals at strategic points of the network will have been modernised and equipped with intelligent logistics systems. The traffic of major seaports will continue to grow, thus securing the supplies of important urban centres such as Rhein-Ruhr, Paris, Budapest and Vienna without adding to congestion or pollution, since there is still free space on rivers and canals.

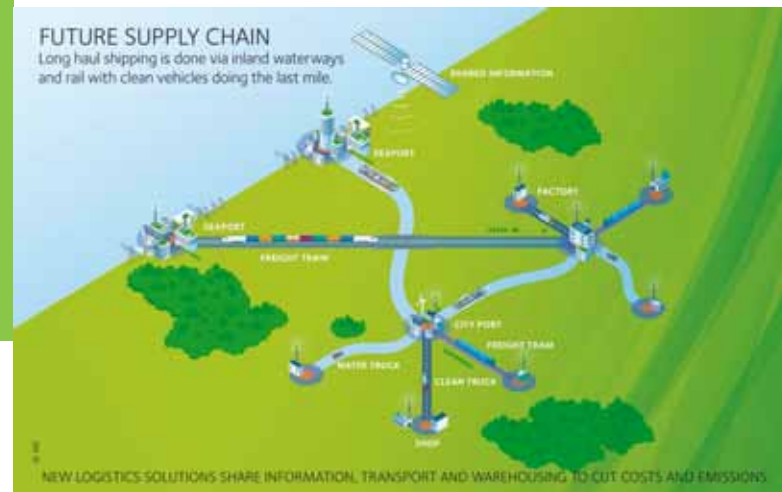
*“The two major benefits of inland navigation for Europe's future are a low energy and carbon footprint and plenty of capacity to grow”*

## Transport patterns at a turning point – the new EU white paper

In the framework of the EU 2020 strategy for more competitiveness, innovation and resource efficiency, the European Commission is reviewing its transport strategy. 57 percent of Europe's oil consumption goes to transport, which is not economically nor environmentally sustainable. On top of that, Europe's economic zones such as the main port regions and the metropolitan regions are heavily congested which compromises further traffic growth.

## The natural option

INE, together with its colleagues from EBU (the European Barge Union) and ESO (the European Skippers Organisation) pointed out the two major benefits of inland waterway transport: a low energy and carbon footprint and plenty of capacity for



growth. With 50 percent of European citizens living close to the coast and in the river valleys of the 15 largest rivers, inland shipping is a natural link between Europe's main seaports and the inland hearts of production and consumption.

To increase the usage of inland waterway transport, the three European inland navigation organisations



have called for two packages of measures. The organisations have stressed the importance of general measures such as giving policy and funding priority to low carbon solutions in order to effectively integrate waterways into transport networks through ports and intelligent transport systems. They have also called for a stronger action plan containing measures and resources that will support the efficiency and development of inland waterway transport itself.

### The design of the core EU transport network

The European Union is laying the basis for the future trans-European networks which will be able to handle the forthcoming major economic and environmental challenges, while trying to keep costs low with national budgets under strain. But the EU will have to live for a long time with the transport decisions it is about to take. Fortunately, Europe's navigable waterways are a particular asset which should not be overlooked. The main waterways in the EU already form an existing natural core network and are the only land transport infrastructure which is congestion free. Inland waterways can keep Europe's main port and city hubs accessible in a sustainable way and at low investment costs.



“The main waterways form an existing natural core network which offer a powerful and low-cost answer to expensive traffic jams and infrastructure capacity shortages in and around Europe's main port and city hubs”

#### INE advocates

- the inclusion of the main waterways in the core network,
- the upgrading of Europe's waterway infrastructure and
- a quality interface of core waterways with sea and inland ports to allow seamless multi-modal solutions.

Together with integrating intelligent information systems across modes, this is key to achieving the European 2020 strategic objectives of competitiveness, energy independence, resource efficiency and improved quality of life. The success of the Rhine River shows how a multi-modal and low-impact link provides maximum benefits at low costs to both industry and society.





# Naiades to continue

## For the entire transport system

Important European main ports are preparing plans to maintain fluid logistics movements inland. Ports located on waterways plan a higher share for waterway transport by 2020 up to 45 percent to ensure growth. To make this happen, general measures will be necessary, but inland navigation also needs to become more efficient, offering more ships, more people and more quality. But there is no way back, if we want to keep transport congestion free and sustainable.

## Naiades future

The current EU action plan for the development of inland shipping, NAIADES, is at the half way mark. Replacing the cut and paste measures of the past, the first EU comprehensive inland navigation programme was launched in 2006 to bolster the advantages of inland waterway transport. Notwithstanding some noteworthy achievements of NAIADES I, there are important lessons to be learnt. The lack of dedicated resources has been a barrier to implementation, as has the lack of integration of the action plan into the overall EU policy agenda.

## Inland navigation needs more than just promotion

INE, together with its colleagues from EBU (the European Barge Union) and ESO (the European

Skippers Organisation), calls for a permanent EU inland waterway development policy and for more ambition to increase the share of inland waterways to keep ports and cities accessible in a sustainable way. That means measures which support the innovative growth of a clean fleet in a business friendly climate, an increase of high quality personnel, the deployment of next generation multi-modal river information services and integration into transport networks.

**PLATINA** (the platform for the implementation of NAIADES) is a consortium of 22 partners from 9 European countries and is scheduled to run until 2012, including INE.

- A constantly updated portal, [www.naiades.com](http://www.naiades.com), provides information and news about inland navigation, regularly updated information on funding and good practises.
- A strategic agenda mapping the needs and directions of future research activities and a collaborative innovation database, based on wiki-technology enabling innovators to learn from and share with one another.
- A European network of inland navigation schools (Education Inland Navigation) assists with creating harmonised education and training standards and developing a European wide recruitment strategy.
- The organisation of the trademark conference Barge to Business.
- A list of inland waterway bottlenecks which should be solved by 2025 has been finalized, and an up-to-date inventory of the current condition of inland waterways in Europe is being created.
- Input for the EU inland waterway structure development plan and support for RIS initiatives.
- A good practice manual on sustainable waterway planning has been published.

“Lessons learnt: the next Naiades action plan needs more European ambition and dedicated resources to make implementation a success in order to benefit the entire EU transport system”



At **Barge to Business**, Europe's premier inland navigation event (30 November and 1 December 2010), trendsetters, logistics decision makers and opinion makers met and discussed how to multiply successful business cases for competitive, clean and innovative shipping in the coming years. A unique meeting place for over 600 visitors from 20 countries.

More info [www.bargetobusiness.eu](http://www.bargetobusiness.eu)



Pallet ships, hybrid vessels, full electric city freight boats, hydrogen propulsion, the first examples are already on the market. Policy makers can make or break multiplication.

In a panel debate Corien Wortmann-Kool, Silvia-Adriana Ticău and Peter van Dalen of the European



Parliament gave their full support to prepare a follow-up to the EU NAIADES programme.

Riverdating, organised by INE member Voies navigables de France, facilitated business-to-business meetings during the conference to bring together inland waterway transport service operators with (potential) users. Companies such as Ikea, H&M, Flora Holland, Holcim, Airbus en Procter & Gamble took part.



Barge to Business was opened by European Commission Vice President Siim Kallas "I am convinced that inland waterway transport can be a valuable partner in logistics and supply chains and make an environmental difference. This conference

is a unique opportunity to demonstrate exactly how. I look forward to the exchange of experiences and ideas on innovative solutions, technologies and services". He announced that his office is working on a proposal for a continuation programme of NAIADES. Etienne Schouppe, Belgian Transport Secretary of Transport and Mobility presiding the EU council of transport ministers added that the Belgian EU presidency prepared the follow-up of the current inland navigation programme which ends in 2013.



Several speakers described inland waterway transport as a key partner in the modal mix to combat congestion and achieve sustainable growth. Realising the full potential however requires a masterplan to facilitate, with infrastructure, start-up support and a lean business environment, the seamless hinterland transport of maritime containers and the development of continental flows.



The Flemish Minister of Mobility, Hilde Crevits, hosted the evening network event at which the Hungarian Transport State Secretary presiding the EU council of transport ministers, Pál Völner, announced the promotion of inland navigation as one of the priorities of the Hungarian Presidency programme. A NAIADES Conference will take place from 6 to 8 April 2011 in Esztergom and the main objective is to contribute to the future of NAIADES by adopting Council Conclusions at the Transport Council on 16 June 2011 in Luxembourg.

# Towards integrated development

On rivers and canals, there are bursts of activities that happily co-exist. This turns waterways into life-lines for the regional economy. Besides transport and logistics, investments in rivers and canals serve many purposes at once: water supply and management, leisure and tourism, energy production, protection of wildlife and biodiversity.

## **A European strategy for the Danube**

Following the example of the Baltic Strategy, in December 2010 the European Commission published the strategy for the Danube region to be adopted by the European council at the start of 2011. The Danube river basin covers a fifth of the EU surface and the region is home to 100 million people. An integrated strategy has more chance of reinforcing major EU policy initiatives, especially the Europe 2020 strategy, and supporting the overall development of this macro-region than the current patchwork of measures.

INE and its regional member via donau participated in the regional consultation conferences during 2010, successfully advocating a better use of waterway transport in harmony with the other river functions. European Commission President Barroso confirmed at the Danube Summit in November 2010 in Bucharest the importance of mobility and multi-modality, with a particular need for investment in navigability, interconnections, intermodal ports and new technologies in order to make the Danube River a green waterway, and to speed up efforts in tackling bottlenecks which impede the free flow of shipping.

*“Innovative processes and measures are needed to prove that it is indeed possible to create win-win solutions for environment, transport and other river uses.”*





## RIVERS: ARTERIES FOR DEVELOPMENT TOWARDS A 2020 LANDSCAPE



### Is it only public transport that makes city transport green?

Cities are central to climate change mitigation. The 2009 action plan of European Commission on urban mobility was still very much geared to public transport. The EU conference on urban freight transport and logistics of November 2010 finally recognised that sustainable supplies of goods supplies are as important as passenger transport to make urban transport green. Rather than permanently handing over key strategic sites to residential property development, it is recognised that cities can tackle congestion and greenhouse gases by embracing innovative and clean waterway concepts to bring more freight into cities and to shorten the last mile, which is the most expensive for business and society. This means sharing the waterfront.

### Guidance for sustainable waterway planning

After a year's hiatus the European Commission has resumed the activities of the rivers expert working group. The group helps in developing guidance on how best to ensure that activities related to the management and development of inland waterways development are compatible with and benefit from the EU's nature conservation requirements. In the group, INE expressed its hopes that the era of isolated approaches will make room for cross-sectoral thinking and that the resulting guidance will support project management which combines early stage consultation with evolving river engineering techniques that help to foster living waterways and cost-efficient clean transport.

# INE members in action

## Austria

### Life Nature

In 2009, the Thurnhaufen bank restoration project within the Danube Floodplain national park, a via Donau project, was awarded the title best LIFE-Nature Project 2007-2008. This project is the first river bank restoration ever undertaken for a navigable river the size of the Danube and the excavation work, represented a significant intrusion into the natural habitat. Both the national park's flora and fauna and flood water protection are benefitting.

### Energy Globe 2010

via donau was awarded this year's Energy Globe Award in the category "Water" for its project to

develop a waste separation system for navigation. In order to facilitate waste separation along the Austrian stretch of the Danube, via donau has developed uniform symbols and markings to distinguish waste collection and residential waste bins. A guide provides information on environmentally-friendly

waste management as well as all waste collection points along the Austrian Danube.



## Belgium

### Integrated waste management site

The Wallonian waterway authorities have opened a new loading platform for domestic waste service in Floriffoux, along the Lower Sambre. This new integrated waste management site also has a facility that allows transfer into river barges. A waste barge service will remove 40 to 50 trucks per week from the congested road network.

### Dredging has begun on Wallonian waterways

For a number of reasons, including budgetary, technical and administrative difficulties, the Wallonian waterways have not been dredged since 1995 but now solutions have been found and dredging began on May 4, 2010. Over the next four years, 1,354,000 m<sup>3</sup> of sediment will be collected.

Dredged material that is polluted will be treated at a new treatment unit or via a mobile processing unit. Two thirds of the polluted sludge will be shipped by barge for treatment and will be recycled in the construction industry.



### Outreach efforts

Promotie Binnenvaart Vlaanderen (PBV) has intensified its contacts with a great variety of transport and logistics managers. Within this framework information sessions were organised to explain how to use inland navigation, a shippers brochure has been published and an advertising campaign is ongoing. In addition, the programme for fleet modernization has intensified, with more than 25 percent of the target group investing in modernization.

### RIS portal Flanders

In 2010, the RIS portal Flanders went online. This portal is primarily aimed at inland shipping entrepreneurs – the end users. With a single click, visitors will get immediate access to all RIS services – both in Flanders and, through hyperlinks, to similar services abroad. From now on, free electronic navigational charts (ECDIS) of Flemish waterways can be downloaded from this site. The portal indicates where you can report electronically, and how to obtain the necessary software. In addition, 'Notices to skippers' can now be received via this portal. For more information: [ris.vlaanderen.be/](http://ris.vlaanderen.be/)





## Croatia

### Agreement on cooperation in intermodal transport in Croatia

An "Agreement on cooperation in intermodal transport in Croatia" was signed between Inland Navigation Development Centre (CRUP), Shortsea Shipping Promoting Centre Croatia, Union for Railways, Association of Croatian Road Hauliers and Association of Ship Brokers and Agents of Croatia announcing the foundation of a Cluster of intermodal transport.

### River Information services made in Croatia

In the last year, CRUP won the tender for the development and implementation of River Information Services in Bulgaria. CRUP was also part of an international consortium who are implementing the project "Detailed Design and Prototype for the River Information Services (RIS) on the Sava River". The project, an initiative of the International Sava River Basin Commission (ISRBC) started in September 2009 and lasted until May 2010.

### Danube-Sava canal investment project

At the end of September the Croatian government officially included the Danube-Sava Canal in the gov-

ernmental investment plans, declaring it one of 30 important investment projects. Construction of the Danube-Sava canal is a part of the Strategy of transport development, the Strategy for development of inland waterway

transport and the Mid-term development plan for inland waterways and ports, which were adopted by the Croatian parliament in 2008.

## France

### The Seine-Scheldt European Economic Interest Grouping (EEIG)

As part of coordinating the implementation of the large scale Seine-Scheldt European inland waterway, Voies navigables de France, the French waterways

managers, the Wallonian Waterway Authority and Waterwegen en Zeekanaal NV, recently created the Seine-Scheldt European Economic Interest Grouping (EEIG). The Seine-Scheldt project will link the Seine basin to the North European inland waterway network, removing a major bottleneck.

### Green commitment

Voies navigables de France has signed a framework agreement dealing with the limitation of herbicides use in non-agricultural areas. For 10 years, VNF has been integrating the protection of biodiversity in all its activities. This year Mr. Alain Gest, chairman of the board of VNF, received the "Marianne d'or du développement durable" (Golden Marianne for sustainable development) prize in the institution category.

## The Netherlands

### "Custom-made Information on Inland Navigation"

A new project of the Dutch Inland Shipping Information Agency (Bureau Voorlichting Binnenvaart – BVB) – Custom-made Information on Inland Navigation ('Maatwerk Voorlichting Binnenvaart') – aims to convince companies about the advantages and possibilities of IWT and tangible hand-tailored logistic advice to facilitate a modal shift from road to water.

### National Monument for Inland Shipping

On one of the islands of Schokland, a World Heritage site, a National Monument has been erected to honour the 160 years of history of inland shipping, and the 160 years of existence of Koninklijke Schuttevaer. Schokland was chosen because for centuries it has been a "safe harbour". The monument was unveiled by Queen Beatrix.



# 2009 in figures



Since the second half of 2008, the dry cargo market has experienced a sharp decrease in freight volumes due to the financial and economic crisis. However, the impacts of the crisis became more evident in the year 2009. For instance, the total transported volume by inland shipping in 2009 in Western-Europe decreased by 13.2 percent with different rates per market segment.

The *agribulk sector* (cereals, seeds, fertilizers, ingredients for feed, etc.) was not affected by the crisis as much as other dry cargo market segments. The year 2009 was an excellent year for the harvest (e.g. grain products) in Europe, especially in France.

The *construction sector* (sand & gravel) had already shown a decline since the start of 2008. However, the biggest impact will be experienced in 2010.

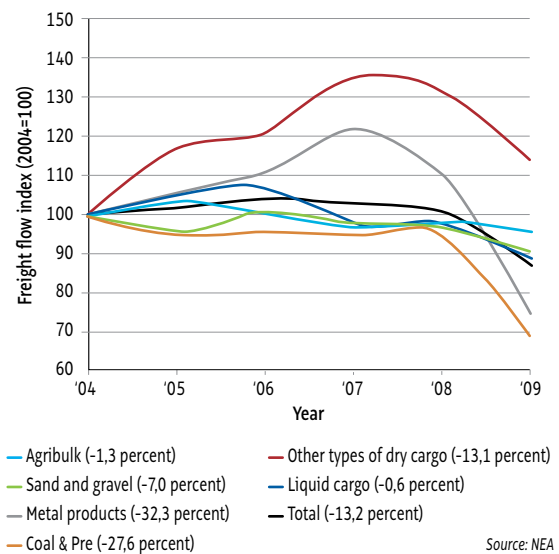
The transport of *metal products* suffered the most from the crisis. Final demand for steel is determined above all by the building and automobile industries. Especially the automobile industries experienced a substantial fall in the first three quarters of 2009. The transport of *coal* also experienced a drop, nevertheless not as much as ore products which are closely related to the production of steel. On the one hand, imports of coal for the production of energy increased in the particularly cold months of February and March 2009. On the other hand, there was a decline during the other months, especially due to the decrease in the demand for coking coal in the iron and steel industry.

The decrease in the transport of *other types of dry cargo* (containers) on IWT was of approximately -13 percent in 2009 compared to 2008. During the recession, when the level of international trade declined, the transport of containers by sea also fell back sharply. This also affected the transport of other types of dry cargo by waterway transport.

The *liquid cargo* sector did not suffer as much as the dry cargo market, at least until the beginning of 2009. The transported volume of liquid cargo increased extremely in the second half of 2008 and the first quarter of 2009, mainly due to the dramatic drop in the oil price in the summer of 2008.

## Inland waterway transport development in 2009 per country.

FIGURE 1 IWT FREIGHT FLOW DEVELOPMENT IN WESTERN EUROPE (2004=100) AND DEVELOPMENT (in %) for 2009 compared to 2008



### Austria

The total tonnage transported over waterways in 2009 was 9.3 million tonnes which represents a decrease of 16.8 percent. The most significant decrease was in the domestic transport market, which declined by 34.4 percent. In t-km, there was also a reduction of 18.5 percent to 9.6 billion t-km. Compared to 2008, nearly all commodity groups faced losses in transport volumes on the Austrian Danube due to the unfavourable economic situation. While agricultural and forestry products recorded an increase of close to 30 percent, ores and metal waste, the commodity group accounting for the largest transport volume on the Austrian Danube, recorded a decrease of about 16 percent. Not only the production output level fell, but weather conditions also significantly affected the development of transhipped cargo volumes at Austrian Danube ports and transshipment sites.

### Belgium

In t-km inland waterway traffic declined by 15.5 percent. The transport performance reduced to 3.8 billion t-km and volumes were also lower at around 61 million tonnes, a decrease of 14.1 percent as compared to 2008. In 2009 Wallonia reported a total

of 37 million tonnes, a decrease of 16.5 percent as compared to 2008. This decrease was attributed to the significant traffic decreases in ores and solid fuels, related to losses in the steel industry due to the economic crisis.

### Croatia

The total tonnage transported over the waterways in 2009 was 257,000 tonnes, which is a reduction of 4.1 percent as compared to 2008. However, the t-km reflected a 5.1 percent growth as compared to 2008, and climbed to 191 million. International transport also reflected an increase of 2.4 percent in tonnes and 8.7 percent in t-km. The most common type of cargos transported on inland waterways in Croatia were agricultural products, metal ores and other mining products.

### France

The total tonnage transported over French waterways in 2009 was 56 million tonnes which is a decline of 6.82 percent compared to 2008. The total t-km transported in 2009 were 7.42 billion t-km which is 1.1 percent less than 2008. In spite of the overall decrease in freight traffic during 2009 the market share of inland waterway transport grew from 3.1 percent to 3.5 percent. This growth is due to an even bigger decrease in the other transport modes because of the declining economy. The decreases from the sectors most impacted by the economical crisis such as the metallurgical segment (-26.8 percent) and the chemical segment (-28 percent) was compensated for by the record growth rates in other freight segments.

### Germany

Transport demand in Germany experienced a significant decrease in transported volume: from 245.7 million tonnes in 2008 to 203.9 million tonnes in 2009 (-17 percent). The transport performance declined by 13 percent compared to 2008. With regard to the container market, Germany experienced a decrease of 8 percent in 2009 compared to a year before (measured in TEUs). Only the transportation of agricultural products experienced an increase in volume of 9 percent.

### The Netherlands

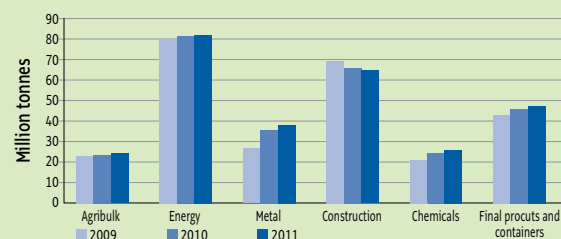
The transported goods on Dutch inland waterways was around 328.9 million tonnes in 2009, which is a

decrease of 13.2 percent compared to a year before. The smallest decrease in 2009 was experienced in the transportation of sand and gravel (-4.7 percent). The impacts of the crisis on this sector will be experienced especially in 2010. This sector reacts rather late in the economic cycle due to the lead-time of construction projects in the commercial and industrial building sector. The consumers are currently more reluctant to purchase new houses and banks are stricter about providing mortgages, resulting in a slowing down in the housing projects. The transportation of liquid cargo fell by 9.3 percent and in the agribulk sector by 6.7 percent.

### Forecasts 2010

The global and European economies have recovered slowly since their lowest point in the first half of 2009. Short term forecasts indicate that the dry cargo transport sector has started the recovery process since the second semester of 2009. NEA short-term forecast for the Dutch transportation sector is presented in figure 2 for 2010 and 2011 per market segment.

FIGURE 2 Total expected IWT transport volume in the Netherlands (in mln tonnes) per market segment per year



Short term forecasts for the Netherlands and Germany indicate that the transported goods on Dutch inland waterways is expected to grow by more or less 5 percent in 2010 compared to 2009. For the year 2010, the transport of construction products is the only market segment for which a decrease is forecast. The transport of metal products is expected to grow the most in 2010. The increase in transport volume in 2010 is expected to be also two digits for the transportation of chemicals and single digits for final products/containers. Meanwhile the recovery will differ per segment, which will depend amongst others on the repletion of stocks and the impacts of government cuts on the demand for goods.

# Structure & membership

## FULL MEMBERS

### Bureau Voorlichting Binnenvaart (BVB) & Koninklijke Schuttevaer

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[www.koninklijkeschuttevaer.nl](http://www.koninklijkeschuttevaer.nl)  
[info@ksvschuttevaer.nl](mailto:info@ksvschuttevaer.nl)



BVB has been established in 1989 by the Dutch inland navigation organisations co-financed by the Dutch government. Its main activity consists of presenting the advantages and possibilities of waterways transportation to the different players in the field. Promotion actions and lobby activities are mainly directed at policy makers and industry. Koninklijke Schuttevaer is a Dutch organisation of barge-owners/inland shipping entrepreneurs with well over 3,000 members and 23 regional departments.

### Centar za razvoj unutarnje plovidbe (CRUP)

Trnjanska cesta 37, HR - 10000 Zagreb  
T: +385 1 539 2991  
[www.crup.hr](http://www.crup.hr)  
[info@crup.hr](mailto:info@crup.hr)



CRUP was founded in 2003 by Croatian inland port authorities, port operators and shippers and forwarders in order to motivate and enhance the development of inland navigation in Croatia. CRUP's main task is the development and implementation of RIS (River Information Services) and the promotion of inland navigation in Croatia. Other activities include project management, software & hardware production, and research & development.

### Service Public de Wallonie Direction de la Promotion des Voies Navigables et de l'Intermodalité (DPVNI)

Rue Forgeur 2, B - 4000 Liège  
T : +32 4 220 87 50  
[voies-hydrauliques.wallonie.be](http://voies-hydrauliques.wallonie.be)  
[dpvni@spw.wallonie.be](mailto:dpvni@spw.wallonie.be)



The Directorate General for Inland Waterways and Mobility of the Service public de Wallonie has a main task to enhance the economic and recreational use of inland waterways in Wallonia, Belgium through distribution of information, the organisation of promotion activities, policy measures in favour of the sector's development and through contacts with economic decision makers, shippers, logistics services providers, local port authorities, etc.

### Promotie Binnenvaart Vlaanderen (PBV)

Armand Hertzstraat 23, B - 3500 Hasselt  
T : +32 11 23 06 06  
[www.binnenvaart.be](http://www.binnenvaart.be)  
[pbv@binnenvaart.be](mailto:pbv@binnenvaart.be)



PBV is a non-profit association founded in 1992 by the Flemish Government. Its mission is to increase the economic and recreational use of inland waterways in Flanders. PBV is a platform for consultation representing all private and public inland navigation interests groups. PBV has no commercial interests. It is an independent partner for the industry and public authorities.



### Voies Navigables de France (VNF)

Rue Ludovic Boutleux, 175, F - 62408 Béthune

T: +33 3 21 63 24 50

[www.vnf.fr](http://www.vnf.fr)

[developpement@vnf.fr](mailto:developpement@vnf.fr)



VNF is a public company created in 1991 by the French state. VNF has the mission to manage, to maintain and to develop 6700 km of the French waterway network. VNF aims at developing activities around the waterways, at promoting the interests of transport by water and at stimulating inland shipping and waterway tourism.

### Via donau (VD) Österreichische Wasserstraßen - Gesellschaft mbH

Donau-City-Straße 1, A - 1220 Wien

T: +43 50 4321 1000

[www.via-donau](http://www.via-donau)

[office@via-donau.org](mailto:office@via-donau.org)

**viadonau** via donau – Österreichische Wasserstraßen-Gesellschaft mbH is the Austrian waterway management company which provides competitive transportation infrastructure on the Danube and works together with the inland navigation sector to come up with innovative logistics solutions to increase the utilisation of the Danube. Furthermore, via donau accomplishes the Federal Government's responsibilities in terms of planning, awarding and monitoring work on the river, collecting and administering fundamental data required for water management and carries out development projects for inland navigation.

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Haven van Brussel – Port de Bruxelles.

### SUPPORTING MEMBERS

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