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**Mid-term progress report
on the implementation of the NAIADES Action Programme
for the promotion of inland waterway transport**

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1. INTRODUCTION

1.1. BACKGROUND

In January 2006 the Commission presented the Communication (COM (2006) 6) which set out the action programme on the Promotion of Inland Waterway Transport “NAIADES”.

The Programme, covering the time frame from 2006 to 2013, focuses on five strategic areas which are basic for the development of inland waterway transport in the EU: *improving market conditions, modernising the fleet, developing human resources, raising image and awareness as well as enhancing infrastructure*. The programme is addressed to all stakeholders of inland waterway transport, the EU and its institutions, the Member States and the sector itself. The European Parliament¹ and the Council of Ministers² have welcomed the initiative and endorsed the programme; the industry³ has confirmed its broad consent.

This report is the second progress report on the implementation of the programme⁴. It covers the period as from 2006 until now. The report gives an overview on the achievements reached so far, the measures still underway or to be tackled and outlines the next steps until 2013 (see the table in the annex). It is structured along the five action fields and subdivided in the categories *legislation, policy measures, funding* and *Member States*. For each action field the main issues are recapitulated.

In the following section the economic context is depicted.

1.2. ECONOMIC DEVELOPMENTS 2006 - 2010

During the last five years growth development in inland waterway transport⁵ was heavily obstructed by the economic and financial crisis. Whereas transported volumes still increased during 2006 and 2007 by 1 %, they fell 2008/9 tremendously by – 21 % in the dry cargo sector and by – 7 % in the liquid cargo sector (which benefited still from the low oil prices in 2008). On the Rhine, volumes decreased by -18%, on the Austrian Danube by -14 %, on the Elbe by – 6% and on the French waterways by – 4%. The most affected products were iron & steel, chemicals and mineral oil products, building materials and fertilisers. Container transport declined by -13 %. Since the second half of 2009 transport demand started to recover. In the wake of the crisis, which revealed an alarming overcapacity in the dry cargo and in the tanker fleet, freight rates fell up to 50% and remain since then at a low level. The consequence is that many enterprises operate at negative margins or live from their capital reserves, which also results in the currently low propensity to invest. Despite the crisis which also affected the other modes of transport in a similar way, the

¹ A 6-0299/2006.

² On 8/9 June 2006.

³ High Level Meeting of 15 February 2006, Vienna.

⁴ First progress report: COM (2007) 770 of 5.12.2007

⁵ Market Observation Inland Navigation in Europe 2009/ 1 and 2, 2010/ 1 and 2

<http://www.ccr-zkr.org/>

modal share of inland waterway transport accounted for 5.4 % and thus remained relatively stable over the last five years.

2. IMPLEMENTATION OF THE NAIADES PROGRAMME

PLATINA

In order to support the implementation of the NAIADES programme, the Commission established 2008 a platform of interested inland waterway transport stakeholders, Member States, River commissions and industry representatives. PLATINA (Platform for the implementation of NAIADES), is a coordination action for inland waterway transport, which brings together 22 partners from 9 European countries. It is funded with 8.35 million from the "Seventh Framework Programme of the European Community for research, technological development and demonstration activities" (2007 to 2013) and is assisting in the implementation of the NAIADES programme since June 2008. The project provides effective support in the five policy areas of the programme.

2.1 MARKET

As one priority, the NAIADES programme identified the improvement of the market framework conditions as vital for a prosperous business climate and economic development of inland waterway transport. In order to keep, or even to increase its market share, the inland waterway transport sector must continuously respond to new market requirements and the opening up of new markets. The characteristics of inland waterway transport as point-to-point transports require a better integration into the entire supply chain. This entails the continuous adaptation and use of new logistics concepts. Given the high capital costs, the creation of new, and the expansion of existing businesses require easy access to finance. Furthermore, the administrative and regulatory framework needs to be reassessed to facilitate entrepreneurial initiatives.

Legislation

- Intermodal Loading Unit (ILU)

On 7 April 2003 the Commission introduced a proposal for a Directive of the European Parliament and of the Council on Intermodal Loading Units which aimed at standardising containers and swap bodies for inland transport on rail road and inland waterways⁶. However, due to the lack of support from the Member States, the initiative, which would have been beneficial for transport by inland waterways, was withdrawn on 23 March 2009.

- Single Transport Document

The introduction of a single transport document and liability regime for all carriage of goods, irrespective of mode, is one of the measures that have been taken up in the Logistics Action Plan of 2007 (COM (2007)607) final with the aim to facilitate

⁶ (COM(2003) 155 final - OJ C 76, 25.3.2004, p. 10).

multimodal transport including inland waterway transport. The possible development of the measure must however be considered in conjunction with the most recent United Nations Convention on Contracts for the International Carriage of Goods Wholly or Partly by Sea (also known as "Rotterdam Rules"), adopted by the UN General Assembly in December 2008, which has been ratified by a number of contracting parties, and which has great potential. The Commission is analysing how this potential can be used for achieving the desired simplification of multimodal transport chains, as well as the possible repercussions the eventual enforcement of this Convention would have on the European plans for harmonisation of multimodal documents and liability.

Policy measures

- Market observation

The continuous monitoring of the inland waterway transport market is particularly crucial for assessing trends and developments in the sector. In this respect, the market observation carried out for the last five years by the Central Rhine Commission on behalf of the Commission has proven a useful tool (<http://www.ccr-zkr.org/>). It includes periodic reporting on inland waterway transport in terms of volumes transported, services provided in the various market sectors and segments, fleet capacity, fluctuations in prices and costs, employment as well as demand forecasts. The current system will run until 2012 and will then be reviewed.

- Online information portal

PLATINA has created an online information portal on inland waterway transport (www.naiades.info). The contents of the website includes all relevant information, events and news regarding a wide range of IWT topics, from new logistics solutions and technical innovations to topical information on infrastructure projects and political initiatives. The website also brings together, in one place, several information sources for the inland waterway sector and other interested parties. The web portal aims at stimulating innovative transport solutions and increasing the awareness of shippers and a broader audience for inland waterway transport. It raises the awareness as well as the visibility of the sector and the opportunities it offers. Since its launch on 1st October 2008, 19,000 unique visitors were registered on this website (status 1st December 2010).

- Screening and monitoring of administrative and regulatory barriers

With a view to reduce administrative and regulatory burden, the Commission launched in 2008 a survey on administrative and regulatory barriers in the field of inland waterway transport which revealed around 180 barriers across all inland waterway countries. Many of the barriers identified relate to the fleet, in particular the vessel certification and ship inspections, the crews, e.g. differences in Boat Master certificates, or to the cargo for which burdensome requirements have to be fulfilled or to waste transport. In the field of infrastructure, regulatory and administrative barriers relate to problems with local or port authorities such as different port dues, canal fees, or limited opening times of ports and locks. Most of these regulatory and administrative barriers originate from national, regional, and local authorities or are imposed by the industry itself. They are being further

evaluated and followed up in the framework of PLATINA in cooperation with the competent national authorities. In the monitoring report 2010⁷, the findings and mitigation measures were re-assessed and further up-dated. According to the report, around 20 problems at national level were solved. They relate to restrictive use of certificates, employment of foreign work-force, security rules, minimum manning requirements, VAT refunding, operating times of locks, etc. Currently the work concentrates on 25 crucial barriers of European relevance and possible solutions.

- Multimodal information and data exchange

The concept of e-Freight includes the ability to track and trace freight along its journey across transport modes and to automate the exchange of content-related data for regulatory or commercial purposes. In January 2010, the e-Freight research project started aiming at developing solutions for information exchange in six real-life business cases of which one addresses the inland waterway transport mode. Moreover, the European Parliament and the Council adopted in 2010 Directive 2010/65/EU on reporting formalities⁸, which stipulates that Member States shall ensure that administrative formalities are carried on through an electronic single window at the latest on 1st June 2015. In line with the requirements of this Directive, the compatibility of the River Information Services (RIS) with the electronic data transmission process referred to in the Directive will be studied and necessary conclusions been drawn.

Funding

- Funding Handbook

The Commission published in August 2008 a comprehensive Funding Guide for Inland Waterway Transport in Europe. The guide gives detailed information about funding programmes and financial aid schemes available for the inland navigation sector across Europe. PLATINA extended the information services by creating an online European Funding Database for IWT (www.naiades.info/funding). This user-friendly service is available in four languages (English, Dutch, French and German) and provides detailed and up-to-date information on almost 50 specific funding programmes available for Europe's inland navigation sector, be it in the field of company start-ups, intermodal transport, fleet modernisation, personnel and human resources or logistics innovations. The online services encourage entrepreneurship among owner-operators as well as small and medium-sized enterprises throughout Europe. Since the release of the digital Funding Database on 31st March 2009, 4,500 unique visitors were registered on the website (status 1st December 2010).

- *De minimis* rules

In order to facilitate access to Public funding, the Commission adopted in December 2006 Regulation (EC) No 1998/2006 on the application of Articles 87 and 88 of the Treaty to *de minimis* aid. It provides that State aids, which amount to max. EUR 200 000 over period of three fiscal years, can be granted to an individual undertaking

⁷ PLATINA D 1.7, Annual monitoring report I, May 2010

⁸ Directive 2010/65/EU of the European Parliament and the Council on reporting formalities for ships arriving in and/or departing from ports of the Member States and repealing Directive 2002/6/EC

without notification to the Commission. This provision which would also benefit small and medium-sized enterprises in the inland waterway transport sector applies from 1 January 2007 until 31 December 2013.

In response to the economic downturn, the Commission adopted on 17 December 2008 as part of the European Economic Recovery Plan (EERP) a Temporary framework for State aid measures to support access to finance in the current financial and economic crisis. The framework allows Member States to grant under certain conditions a lump sum of aid up to EUR 500.000 per company for two years to relieve them from financial difficulties. The framework was valid until 31 December 2010. Since the *de minimis* aid does not need to be notified to the Commission, the Commission services have no overview of their use.

- Marco Polo II

In the framework of the Marco Polo programme which applies to environmental friendly transport modes such as rail, short sea shipping and inland waterway transport, around EUR 10.2 Mio have been allocated from 2006 to 2009 in four calls to six Modal shift, Catalyst and Common learning actions in the inland waterway transport sector.

As part of the revision of Regulation (EC) No 1692/2006 establishing the second Marco Polo programme to improve the environmental performance of the freight transport system, the funding criteria have been revised, *inter alia*, with the objective to better accommodate the specificities of inland waterway transport. Thus, in the call of 2010, 14 applications have been submitted, some combined with other transport modes, of which five were successful. The grant awarded to these projects will be around EUR 3.7 Mio.

- Research and Technological Development

The research project RISING, which started on 01.02.2009 and co-funded under the 7th Framework Programme for Research and Technological Development develops innovative solutions to facilitate the integration of inland waterway into logistics and supply chains. RISING defines services based on River Information Services (RIS) which serve transport and logistic purposes. These are services supporting voyage planning, fleet and port and terminal management as well as event (deviation) management.

Member States

- State aid

Boosting the market position of inland navigation in emerging markets such as intermodal container transport is the target of a series of specific funding programmes at national level. Apart from the general company start-up support services, which are offered in almost all Member States, several Member States pursue also a targeted approach towards promoting inland waterway transport. Some countries grant subsidies to support the creation of new market initiatives in inland waterway transport, such as combined transport and container liner services. Start-up aids for such services take the form of a subsidy for each container or intermodal

loading unit transhipped; in some cases also market studies and the development of intermodal concepts are supported. In addition, national funding programmes assist investments in intermodal and port facilities in order to facilitate new market initiatives. Currently, 13 national support programmes are available for the construction, extension, and modernisation of combined transport terminals, terminal equipment, etc., though not all of these programmes are dedicated to inland waterways alone. The majority of these national programmes can be found in Western Europe.

- State aid guidelines

Until now the Commission has approved state aid schemes for inland waterway transport in accordance with Article 107 TFEU on a case-by-case basis. It has ensured that the same rules are applied to comparable state aids given in different Member States and that by this a level playing field has been maintained. In its Communication of January 2006, the Commission had considered the possibility of adopting specific State aid guidelines for the sector which however has not materialised, in particular due to the economic and financial crisis, which required a different approach.

2.2 FLEET

The second focus of the programme lies on the modernisation of the fleet. In order to maintain its assets as an efficient, safe and environment friendly mode of transport, the sector must constantly adapt and improve its logistics efficiency, safety, and environmental performance to new technological developments and market requirements. The following measures have been taken:

Legislation

- Directive 2006/87/EC laying down technical requirements for inland waterway vessels and repealing 25 years old Directive 82/714/EEC was adopted on 12 December 2006. It aims at the harmonization of technical standards of vessels and is designed to lay down a high level of safety on EU inland waterways and to establish equivalency with the corresponding standards on the Rhine. The Directive including its various technical annexes has been transposed by the Member States into national law by 30 December 2008.
- Directive 2008/68/EC on transport of dangerous goods seeks compliance with international safety standards and establishes a common regime for all aspects of transport of dangerous goods, by road, rail, and inland waterways. It aligns with the European Agreement concerning the International Carriage of Dangerous Goods by Inland Waterways (ADN) which sets out the conditions under which dangerous goods can be transported. On this basis, the single hull vessels in inland waterway transport shall gradually be replaced until 2019 by double hull vessels and thus increase the safety and environmental protection of inland waterway transport further.
- Directive 2004/26/EC relates to measures against the emission of gaseous and particulate pollutants from internal combustion engines installed in non-road mobile machinery (NRMM) in line with the EU environmental policy it aims at

progressively reducing the emissions and to phase out polluting equipment. The Directive also includes engines for inland vessels in its scope which sets gradually more stringent limits for exhaust emissions. Since 2007, thus, engines for inland vessels have to meet the criteria of emission stage III. Currently, a revision of the Directive is underway to introduce by 2012 emission stage IV which will also apply to inland vessels. The different emission stages regulate the type approval of engines according to power output and swept volume.

- Directive 2009/30/EC introduced a mechanism to monitor and reduce greenhouse gas emissions. In this connection Council Directive 1999/32/EC was amended as regards the specification of fuel used by inland waterway vessels. By this, fuels for inland vessels have to meet certain criteria concerning the emission of greenhouse gases. In addition, as from 1 January 2011 diesel for inland vessels has to meet the same criteria on low sulphur as road diesel (EN 590). This means that the amount of sulphur in ships diesel will be limited to 10 mg/kg.

Policy measures

- Preparatory work for 'European Hull Data base'

In a majority of European inland navigation countries, national databases for vessel-related data are already operational, covering the requirements of authorities responsible for the certification of vessels. These national databases vary in their set-up, both regarding their technology as well as potential interfaces to external systems, inhibiting seamless international exchange of vessel data on a European level. On the basis of an agreed functional specification, PLATINA facilitated the establishment of a pilot system for a European Hull Database. The preparatory work will enable a smooth transition towards full blown implementation and operation.

- Online 'Innovation Data base'

In order to accompany technological innovation in inland waterway transport, PLATINA has established a dedicated innovation expert group to identify promising and state-of-the-art technologies and innovations that can make the waterway transport system more competitive, safer and more sustainable. Results of the work are consolidated in an interactive online innovation database based on wiki technology (www.naiades.info/innovations). The continuously evolving database contains already over 45 state-of-the-art innovations in the fields of hull improvements, cargo equipment, machinery, ship common systems, and improvement of environmental technology. The database enables all interested stakeholders to share information on innovative techniques and practices in an efficient way and thereby enhances their multiplication.

- Strategic Research Agenda

The PLATINA innovation expert group deals not only with the current state-of-the-art technologies, but is also analysing the main challenges which the sector will face in the next decades. The identified challenges range from climate change impacts, changing requirements on personnel to future shortages of fossil fuels. The findings of the expert group have been summarised in a Strategic Research Agenda for inland waterway transport (IWT-SRA) (www.naiades.info/downloads) for further

consideration by the sector, Member States and the European Union when developing and implementing research and technological development strategies and programmes. It includes a technology forecast and suggests ideas and directions for future research and developments activities. Concrete recommendations so far have been made in the fields of ship building, simulators, regulation, logistics, hydrodynamics, propulsion and alternative propulsion systems (including fuel cells), high speed engines and traffic management.

Funding

- Innovation Fund

As incentive to investment in particular into the modernisation of the fleet, the NAIADES Programme suggested considering *inter alia* the use of the Inland Waterway Reserve Fund, created under Council Regulation (EC) 718/1999⁹ and financed by the profession. In this regard, the European Parliament called upon in its Resolution of October 2006 that such an Innovation fund, "(...) *should be financed as to one third by the sector (the existing Inland Waterway [reserve] Fund), for another third by the EU and the remaining third by the Member States*". The Commission services have undertaken exploratory work with the professional organisations and the Member States in this regard. The concept of a tripartite fund however did not materialise due to inherent insurmountable funding issues such as the definition of a generally accepted contribution and distribution key among the contributors and beneficiaries of the fund. In the course of the financial and economic crisis the professional organisations are now considering a proposal on how to use the Reserve fund to alleviate the impacts of the downturn on the industry.

- Research and technological development

Under the Seventh Framework Programme of the European Community for research, technological development and demonstration activities" (2007 to 2013), research activities related to inland navigation can be funded under the Transport Theme. In 2010, the Transport Work Programme included a specific topic on "Competitive continental shipping including port operations", while in the 2011 Transport Work Programme a topic was dedicated to the "Cost effective modernization of the inland fleet for freight transport.

Member States

- State aid

Several countries have created and implemented dedicated funding programmes to help modernise the European fleet. To date, almost 20 national funding programmes are available across Europe that support measures to modernise the inland fleet. The majority of these programmes concern direct grants which typically provide financial incentives for measures to reduce fuel consumption and emissions (e.g. diesel particulate filters and nitrogen reduction systems), retrofit of engines, improvements of hull design, alternative propulsion systems, on-board transshipment cranes, but also on-board information and communication technologies (including River Information

⁹ OJ L 90, 2.4.1999, p. 1-5.

Services). Such modernisation programmes are however concentrated in Western and Central Europe (Austria, Belgium, Czech Republic, Germany, France, Netherlands). With one exception of Croatia, dedicated support measures to achieve fleet modernisation are lacking in the countries along the Middle and Lower Danube.

2.3 JOBS AND SKILLS

A major concern in the inland navigation sector is the shortage of qualified crews and an increasing lack of entrepreneurial successors. The work profile and conditions on board – long working hours, extended periods away from home – are often considered as less attractive as in other professions. In order to attract and maintain qualified people in the sector, NAIADES emphasises the improvement of working and social conditions on board, but also career development and vocational education and training. The Sectoral Social Dialogue at European level plays a supportive role in this respect.

Legislation

- Proposal for an Amendment of Directive 96/50/EC on Boatmaster certificates

The legislative initiative aims at the harmonisation and simplification of the legal framework for the issuance and recognition of boatmasters' certificates across the European Union. Currently, national boatmasters certificates issued pursuant to EU law are not recognised as valid for the navigation on the Rhine. The harmonisation with the Rhine system would therefore facilitate the free movement of boat masters across Europe. A proposal for an amendment of Directive 96/50/EC in this sense is currently subject to an impact assessment.

Social Dialogue in the inland waterway transport sector

- In the Sectoral Social Dialogue Committee established in inland waterway transport, the social partners officially started negotiations in January 2008 on specific working time arrangements in the inland waterway transport sector. The provisions shall take account of the specific needs of the sector. A social partners' agreement is likely to be concluded. Other topics on the agenda of the Social Dialogue are the establishment of EU job profiles for all functions in inland waterway transport, the harmonisation of manning requirements, the development of social partner's recommendations for the improvement of on-board working and living conditions as well as on fair competition on inland waterways.

Policy measures

- IWT Educational network

In order to improve the effectiveness and efficiency of the educational system in inland waterway transport stronger cooperation and coordination between the specialised educational institutions in Europe are needed. The transfer of knowledge between all relevant parties by collecting, translating and exchanging learning material, providing start-up support for student and teacher exchanges, and the organisation of joint projects are important elements of a strategy for the development of harmonised education and training standards in the inland waterway transport sector. For this purpose, a European network of inland navigation schools –

EDINNA (Education Inland Navigation) was founded in February 2009 with the technical support of PLATINA. The network fosters the harmonisation of education and training curricula and provides a platform for experts enabling exchange of know-how and a concerted approach towards the development of professional competencies in an inland waterway transport.

- Preparatory work for education and training standards

Concerning the development of European standards for education and training a joint working group of PLATINA and EDINNA undertook preparatory work on the harmonisation of professional competencies and job profiles for the operational and management level. At a later stage, this process could lead to “Standards of Training and Certification Inland Navigation” (STCIN), similar to the international STCW Code in the maritime sector.

- Development of recruitment strategy

The reasons for the shortage of qualified IWT personnel vary depending on the situation in the different Member States. Recruitment campaigns to attract interested people should therefore be adapted to national or regional conditions and needs. PLATINA is currently working on the development of a recruitment strategy by defining the target groups, the communication objectives, and the design of an easy-to-apply campaign toolbox. Progress monitoring procedures and evaluation loops will complement the strategy and its tools.

Member States

- Education and training allowances

In order to foster inland navigation personnel several Member States are granting aid for vocational training and education of boatmen. In most cases the supported training schemes relate to the use of new technologies, safety, management, and IT skills. For example, in Germany the funding volume of the training programme for young people aboard of a vessel has increased since 2007 to 2.5 Mio EUR/year thus allowing the support of ca. 100 apprenticeships per year.

- Simulators

Navigation simulators prove to be an indispensable tool for training and education also in inland navigation. Simulators have been established in Belgium (2009), France, Germany (2008), the Netherlands and Romania. They are primarily used for training and education purposes, allowing students to gain practical experience and proficiency in different traffic situations and navigation areas. They also support the refinement of other skills (e.g. the use of communication or manoeuvring instruments, radar) and are used for exams. In this regard the further technical harmonisation of the simulator technology and their integration into the educational programmes should be considered.

2.4 IMAGE & AWARENESS

The choice of the transport modes lies first and foremost with the market actors. Better knowledge and awareness of the freight forwarder and logistics industry

regarding the potential of inland waterway transports is therefore decisive. Freight forwarder and logistics decision-makers are often not aware of the advantages of inland waterway transport and privilege their usual logistics patterns. Greater visualisation of inland waterway transport and the creation of awareness of the main target groups, the logistics decision-makers, freight forwarders, policy-makers and the public can help to increase the interests of customers to use inland waterway transport.

Legislation

Regulation (EC) No 1365/2006 on statistics of goods transport by inland waterways repealed Directive 80/1119/EEC which presented a number of shortcomings with regard to reporting and monitoring of this transport mode. The Regulation addresses the shortcomings and defines a set of common rules for inland waterways transport statistics. Its objective is to provide the Commission, other EU Institutions, national governments and the general public with comparable, reliable, harmonised, regular, and comprehensive statistical data on the development of goods transport on inland waterways in the European Union. It applies in the 13 Member States with significant inland waterway transport. The Regulation was amended by Commission Regulation (EC) No 1304/2007 of the European Parliament and of the Council with respect to the establishment of NST 2007 as unique classification for transported goods and is implemented by Commission Regulation (EC) No 425/2007.

Policy measures

- Communication and Promotion strategy

To promote inland waterway transport as an attractive transport mode, PLATINA has set up a network of promotion and development experts for the exchange of good promotion practices. In this framework, an in-depth analysis of the current image of inland waterway transport has been undertaken with the objective to elaborate an effective and consolidated communication strategy and an agenda aimed at streamlining the three main activities of promotion and development structures: informing and communicating with target groups to improve the image of inland navigation, providing support to inland waterway policy makers and advising and encouraging transport users to use inland navigation. Results are made available on www.naiades.info. This coordinated action shall raise the efficiency and effectiveness of the various communication initiatives.

- Benchmarks and best practices

Another way to raise awareness of inland waterway transport is to collect and disseminate success stories and good practices from the sector. In this regard PLATINA produced Good Practice Manuals in 2009 and 2010, containing more than 70 success stories. These manuals are not limited to new or innovative market services, but also include good practices and benchmarks in fleet modernisation, image building, new financing models, and the practice of infrastructure planning. They are described and presented for all European countries with inland navigation with a view to demonstrate innovative aspects, economic implications, and possible transferability to other countries or markets. As of 2011 main results will be

disseminated further through the creation of an online good practice database, which will support the communication strategy on the promotion of inland navigation.

- Promotion conference

Only few regular conferences on inland waterway transport are held at European level. PLATINA established the concept for a leading, recurrent, and recognisable IWT event at European scale which is capable of attracting a broad audience of users as well as logistics and policy decision makers. A first trademark conference called "Barge2Business" was organised in Brussels on 30 November and 1 December 2010 with potential customers, politicians, logistics service providers and the sector (www.bargetobusiness.eu).

Funding

- IWT Promotion centres

In order to raise the attention of users to transport by inland waterways, the NAIADES programme suggests the setup of a European network of promotion centres. Such promotion centres already exist in a few Member States with good success and should also be set up in other Member States with a potential of inland waterway transports. The main function of the promotion centres is to advice and to encourage customers at local level to use inland waterways. In the last years, the Commission granted financial incentives for the start-up of promotion centres on the River Elbe, the River Po and on the Danube (Hungary).

2.5 INFRASTRUCTURE

The shape and quality of inland waterway infrastructure are the decisive factor for the performance of inland waterway transports. Efficiency and competitiveness of transport by inland waterways depend largely on the conditions of the waterway network and ports. In order to enable inland navigation to provide its services in a competitive and efficient manner, it is crucial that the waterway and port infrastructures comply with the needs. The maintenance and improvement of the network as well as the removal of the bottlenecks is in the first place the responsibility of the Member States. The EU contributes to it through various programmes, in particular the Trans-European Transport networks (TEN-T) and the Regional funds.

Legislation

- TEN-T Guidelines

The main European inland waterways and ports form an integral part of the trans-European transport network (TEN-T) which is defined in the TEN-T guidelines. In order to assess future infrastructural needs for the European transport system as a whole, and to develop appropriate and forward-looking solutions, the Commission has launched a fundamental review of the TEN-T policy in 2009¹⁰ with the objective

¹⁰ COM(2009) 44 final

to establish new TEN-T Guidelines. The intention of the new Guidelines is to put emphasis on issues such as: climate change objectives, better connection between the Union's network, neighbouring countries, and other parts of the world, innovation, intelligence, and efficiency of the network planning and operation. The intention is that they will include a dual layer planning approach with a comprehensive and a core network that takes account of the infrastructure with high strategic importance for the European transport system as a whole. Inland waterways shall occupy an important place in this approach. The new guidelines are planned to be adopted in summer 2011.

Policy measures

- TEN-T Coordinator

In order to facilitate the implementation of the TEN-T Priority projects in the inland waterway network, i.e. the Rhine/Meuse-Main-Danube axis (N° 18) and the Seine-Scheldt link (N° 30), the Commission appointed Mrs Karla Peijs, former Dutch Transport Minister, on 27 September 2007 as European coordinator for these projects. As regards the projects on the Danube, the focus of the activity of the coordinator was laying on the mediation between economic and environmental interests regarding the bottleneck between Straubing and Vilshofen. Regarding the Seine-Scheldt connection, endeavours lead to the creation of the Intergovernmental Committee between the French government and the Belgian regions with the view to coordinate the realisation of the Seine-Nord Europe canal and the upgrading of the corresponding Belgian fluvial routes¹¹.

- Preparatory work for infrastructure policy

To ensure that the European inland waterways system offers sufficient capacities and a multi-modal quality network enabling seamless transport with efficient connections to other transport modes, adequate infrastructures are of vital importance. With reference to the UNECE's revised "Blue Book" (2006) as well as the existing national and European plans and programmes, PLATINA has established a comprehensive inventory of infrastructure development measures. On the basis of a freight flow analysis and a systematic status report on the various ongoing or planned waterway infrastructure projects, the main bottlenecks in the European inland waterway network have been identified. After validation and consolidation reconciling the data, the survey will provide a knowledge base on which further initiatives with regard to the EU IWT infrastructure policy can be developed.

- Manual of good practice for sustainable waterway planning 2010

Infrastructure planning has to take due account of ecological and economic interests. In order to help to reconcile different policy objectives such as transport, environment, climate change and sustainable mobility, PLATINA supported an interdisciplinary dialogue of stakeholders and experts with the publication of a manual on sustainable waterway planning, which serves as a reference for inland waterway planning authorities and other interested parties. The manual contains

¹¹ European Coordinators Annual Reports 2009/2010
(http://ec.europa.eu/transport/infrastructure/european_coordinators/2010_en.htm)

international good practice examples demonstrating how general planning principles can be turned into practice. It describes innovative measures and approaches of ecological river engineering, such as the re-connection of side arms, the riverbank restoration, the optimisation of groins, and the granulometric river bed improvement.

Funding

- TEN-T

Annual and multi-annual programs

For the TEN Priority Project Nr. 18, the Rhine/Meuse-Main-Danube axis around 69 Mio EUR from the TEN budget and the Structural funds have been spent since 2007 and for the Priority Project Nr. 30, the Seine-Scheldt connection, ca. 66 Mio EUR.

In the framework of the annual TEN-T programme ca. 23.5 Mio EUR have been granted between 2007 and 2009 for studies and works, e.g. for lock modernisation and up-grading, the heightening of bridges, weirs or conceptual studies.

- Cohesion Policy

In the framework of the Cohesion Policy above 880 Mio EUR are foreseen from the Structural and Cohesion Funds in the programming period 2007 – 2013 for inland waterways. As the relevant operational programmes are multiannual and managed at national or regional level, there is no detailed information on individual projects. Moreover, many projects concerning inland waterway transport are also co-funded in the framework of multimodal transport schemes, e.g. ports, where it is not always possible to segregate the investments for each transport mode.

- River Information Services (RIS)

The multi-annual TEN-T programme had programmed 50 Mio EUR for the period from 2006-2013 for the deployment of River Information Services (RIS). RIS is an innovative concept for enhanced traffic and transport management in inland shipping facilitating electronic in-advance and real-time data transfer. The legal basis, the RIS Directive and the technical specifications, provide a European-wide framework for the harmonised implementation of the RIS concept. RIS applications shall be interoperable and compatible on a national as well as European level in order to allow continuous cross border traffic without technical obstacles. RIS data exchange and communication need to be harmonised on a European level in order to facilitate the interoperability of the overall system. The RIS concept and legal framework foresee also the interoperability with other modal and in particular maritime traffic management systems. Their real-life interconnection is becoming however more important and will be increasingly focused upon in the future.

A first TEN-T call for proposals took place in 2008 resulting in the implementation of six RIS projects with a granted EU contribution of 16.3 Mio EUR. A second successful call for proposals closed end August 2010, five proposals passed the evaluation process and are currently subject to the required administrative procedures. Experiences gained during the implementation of the TEN-T projects

will be transferred back into the maintenance and further development of the legal basis for RIS as well as into the RIS concept in general.

In the framework of the Structural and Cohesion Funds, financial support is granted to Romania and Bulgaria for the setting-up of RIS, approximately 8.5 Mio EUR and 13 Mio EUR respectively. Current initiatives are running between 2010 and 2013.

With the financial support from the Instrument for Pre-Accession (IPA) the programme for the introduction of RIS on the Serbian Danube started in 2009 and will lead to full-scale implementation of RIS in Serbia in 2012. EU funding amounts to approximately 10.5 Mio EUR. The setting-up of RIS in all Danube riparian countries is considered key from a corridor perspective.

- Member States

No information is available from the Member States on the expenditure spent on the maintenance and improvement of the inland waterway networks and infrastructures in the period in question.

2.6 ORGANISATIONAL STRUCTURE

With a view to the implementation of the programme, the NAIADES Communication also addressed the organisational structure in inland waterway transport which is dispersed over different actors and levels at European, international and national level as well as River Commissions. In 2008, the Commission services carried out an impact assessment on the organisational framework and examined four different options of an organisational set-up (SEC (2008) 23). The impact assessment concluded that increased coordination of the existing institutional actors, combined with a EU membership in the Danube Commission, would offer the best advantages, and the Commission should play a stronger part within the existing organisational framework as requested by the stakeholders. In a reflection group (“REGINA”) including experts from the Member States and the industry, the experts identified around 60 IWT related tasks which should be coordinated on European level.

As regards the membership of the EU in the Danube Commission, the Council of Ministers authorised the Commission on 7 June 2007 to negotiate the accession of the EU to the Belgrade Convention. Due to a dispute related to the revision of the Belgrade Convention, which takes place at the same time as the accession, the signature process of the amending protocol to the Belgrade Convention came however to a halt. The Commission is committed to an early conclusion of the Convention.

3. CONCLUSION

NAIADES established for the first time a comprehensive European inland waterway transport policy framework. It has initiated concrete legislative, policy and coordination actions in five essential areas - market development, fleet modernisation, jobs and skills, awareness building and infrastructure - but is not meant as a financial support programme as it is not endowed with proper own financial resources.

NAIADES plays an important strategic role: it created for the first time a universally acknowledged European momentum in the inland waterway transport sector and raised it high on the political agenda of all stakeholders. It turned into the reference point for the inland waterway transport sector and policy makers at national and EU level.

On an operational level, the NAIADES programme has delivered, and is delivering - despite the lack of own financial resources - a wide range of valuable and tangible results.

For example the technical requirements for vessels and the rules for transport of dangerous goods have been recast. In a screening exercise regulatory and administrative barriers have been investigated and their removal tackled, The application of de minimis rules also to small and medium sized enterprises in the inland waterway sector as well as the publication of a regularly up-dated funding handbook contributes to facilitating access to financing. The recast of the directive on statistics of the transport of goods by inland waterways and the setting up of various online data bases improve the access to information about inland waterway transport related issues. Preparatory work on the harmonisation of education and training standards advanced, and the sectoral social dialogue is about to conclude on specific working time arrangements in inland waterway transport. In the field of infrastructure a comprehensive inventory of waterway related measures and a manual of good practices for sustainable waterway planning have been established, whereas financial support has been given to some extent to inland waterway projects, e.g. on the Rhine/Meuse-Main-Danube corridor and for the Seine/Scheldt connection and to the deployment of Information Services on the waterways (RIS) by the TEN T programme and the structural funds.

The implementation of the programme would however not have been possible without PLATINA, a co-ordination and support action funded by the EU research programme, and the enthusiasm and commitment of the stakeholders involved in and associated with PLATINA – the sector associations, promotion offices, knowledge centres, authorities and the river commissions.

This being said, there are remaining measures which need to be re-assessed in the light of new developments, others are on their way as in the case of the harmonisation of education and training standards or are of a permanent nature such as market observation.

It became also clear that the programme cannot be pursued at EU level alone but together with the Member States and the inland navigation sector itself. The definition of the five priority areas was an important step forward but it is crucial that they are also implemented in all Member States with inland waterway transport.

A number of measures cannot be accomplished "on their own" as they are interrelated with other policies such as intermodality with other transport modes or the internalisation of external costs, which go beyond a modal sectoral approach.

The NAIADES programme is not equipped with a dedicated EU budget. Out of the five areas - market development, fleet modernisation, jobs and skills, awareness building and infrastructure, only 'infrastructure' can make use of already existing

funding programmes such as the TEN-T programme. In addition the framework programme for research and technological development can be used, but it has its limits. There are no financial means for e.g. market incentives, support to fleet modernisation or promotion and awareness campaigns or to activities which require European co-ordination, harmonised solutions and a permanent follow-up.

It is widely acknowledged that the lack of dedicated resources turned out as disadvantage for the implementation of the programme, which could only to a limited extent be compensated for by PLATINA. PLATINA is limited in time and will expire before the end of the NAIADES programme. In addition, the financial and economic crisis played a determining role. It is only now that the sector is showing some signs of recovery from the setback.

In order to ensure the continuity of the measures and to keep the momentum created, the programme to support inland waterway transport needs to be continued after the running out of the current programme.

Current and future tasks in IWT policy are originating from EU policies, from the existing IWT regulatory framework requiring continuous efforts in implementation and maintenance and from new legislative proposals requiring preparatory work.

The overall objectives of the current NAIADES programme - competitiveness, intermodal integration, awareness raising; energy-efficiency and environmentally-friendliness of the fleet; removal of infrastructure bottlenecks; research and technological development; technology and innovation transfer into the sector and last but not least employment, education and training and working conditions - remain valid in the future.

In order to further exploit the potential of inland waterway transport, the strengthening of its market position, its integration into co-modal transport chains, enhanced nodal interoperability, the deployment of new technologies including River Information Services (RIS) and their interoperability with other intelligent transport systems will gain increasing importance.

Even if inland waterway transport has a good environmental record, efforts will be needed to maintain and further improve its environmental performance, also with a view to climate change and mitigation strategies such as decarbonisation. As other transport modes, inland waterway transport may be concerned by climate change effects and efforts may be required to implement suitable adaptation strategies of a technical or operational nature.

Further reflections may be also needed in order to see how the current complex organisational structure of the sector could be further improved to facilitate decision-making.

In order to ensure the long-term development and successful implementation of a European inland waterway transport policy also in the wider strategic transport policy framework, the programme needs to be continued possibly supported by existing funds such as infrastructure, research and structural funds. Last but not least adequate implementation mechanism would also need to be defined.

The importance of the financing of common actions at EU level within agreed current and future resources, as well as that the modernisation of the fleet and infrastructure are important elements for the development of inland waterway transport have been also recognised in the Council conclusions on full integration of waterborne transport into the EU transport and logistics chains of 2/3 December 2010.

"NAIADES" Action Programme Overview state of play – December 2010

A. LEGISLATIVE INSTRUMENTS

INSTRUMENT	STATUS/ COMMENT
Harmonisation of:	
§ technical requirements for vessels	- Directive 2006/87 et al.
§ intermodal loading units (ILU)	- withdrawn
§ statistics of goods transport by inland waterways	- Regulation 1365/2006
State aid guidelines for support schemes and	- postponed
de minimis rules for IWT	- Regulation 1998/2006/2008
Harmonisation of:	
§ transport of dangerous goods	- Directive 2008/68
§ engine emissions	- Stage IV planned 2012
Reinforcement of position and normative framework of IWT	- Impact assessment 2008: no initiative
Harmonisation of:	
§ boatmasters' certificates	- Proposal in preparation
§ intermodal liability	Subject to Assessment /Ratification of Rotterdam Rules
§ manning requirements	- IA negative - secondary priority
§ waste disposal	- postponed – subject to experience with Convention on the collection, transport and disposal of waste in the Rhine and Inland Navigation
§ education and training standards	- To be developed into STCIN
§ intermodal documentation	- Subject to Assessment /Ratification of Rotterdam Rules
§ infrastructure charging	- Subject to ongoing Whitepaper process
§ fuel quality	- Directive 2009/30

B. POLICY INSTRUMENTS

INSTRUMENT	STATUS/ COMMENT
TEN Coordinator inland waterways	Ms Peijs (9/2007)
Funding Handbook for IWT industry	Published 9/2008
Screening for barriers in existing and new European and national legislation	Published 9/2008, Follow-up with Platina
Administrative one-stop-shops and IWT focal points	Member States
Social dialogue within sector	<u>Autonomous</u> process - Working time (2011) - Qualification
IWT Market observation	ongoing
European Development Plan for waterway infrastructures and transshipment facilities	Renamed into Inventory of Inland Waterway Bottlenecks (2011)
Recruitment campaigns	Concept prepared in PLATINA (2011)
Spatial planning: higher priority to (re-)developing industrial zones nearby waterways	MS responsibility
Interdisciplinary dialogue on project level	Environmental Guidance IWT (2011)

C. SUPPORT INSTRUMENTS

INSTRUMENT	STATUS/ COMMENT
European IWT Reserve Fund	Tri-Partite Fund (MS / Sector / EC) failed.
National support programmes	Notified 2007/08:
§ Promote modal shift, facilitate investment	AT, FR, BE, CZ
§ Efficiency, environment and safety technologies	AT, CZ, DE, FR, NL
§ Promotion and development organisations	AT, BE, DE, FR, NL, IT
§ Infrastructure improvement & maintenance	
European RTD and support programmes	
§ Services: Marco Polo, INTERREG, etc.	
§ Fleet: RTD programmes (FP 7), etc.	PLATINA (8,5 M€) RISING (5,3 M€) ECONET (1,6 M€)
§ Jobs and skills: SOCRATES, LEONARDO, etc.	Not specific
§ Infrastructure:	
- TEN-T Priority projects 18&30	PP 18&30: 2007-2010: 135 M € Annual programme: 2007-2009: 7 projects (ca. 23.5 M€);
- RIS (TEN-T MIP)	RIS: 6 projects (16 M€)
- PHARE, ISPA, CARDS, INTERREG, etc.	REGIO Operat. prog. 2007-2013: amount not known