

ANNUAL REPORT



INE

Shaping policy for more & better waterway transport

2014

The new normal or at a turning point

Fragile EU growth

Growth in the EU remains vulnerable after the down period 2012-2013 and at a much slower pace than before the crisis. Existing debt levels keep public investment low while uncertainty and difficult access to credits don't help to encourage private investment. The eurozone malaise is dearly felt by the transport sector as

derived demand. Investment is a key instrument to drive recovery in all economic sectors, but it is too early to judge if Juncker's 315 billion euro investment package can have a positive impact to foster private and public investment in transport and sustainable mobility.

Energy Union taking the road to Paris

Plunging oil prices on the other hand sound like good news for industry and consumers including inland waterway operators. The sector saw its costs decrease in 2014 thanks to a combination of lower interest rates and falling oil prices. In any case, the IEA and the World Bank warn it could also encourage an increased use of fossil fuels putting us on course to a 4°C increase in global temperatures, instead of the «safe» 2°C limit advised by the IPCC.

labour taxes. The EEA found that there may be multiple benefits - countries with the highest environmental taxes also seem to rank very high for eco-innovations and competitiveness.

Knowing that the technical solutions or investments are not lacking but appropriate policies and institutions are required to provide a solid direction and framework for investment, new Commission president Juncker pleaded in July 2014 in the Parliament for establishing an Energy Union, an ambitious EU policy for energy security and efficiency without climate risk while giving a boost to the clean energy business ensuring economic growth and job creation.

The IEA strongly recommends that policymakers don't miss the opportunity of cheaper oil now to transform the energy system by eliminating subsidies to fossil-fuel consumption, step up investment in renewables and introduce carbon pricing and taxes while lowering

EU energy and climate targets 2030

Share of renewable energy to at least



Increasing energy efficiency by at least

27%



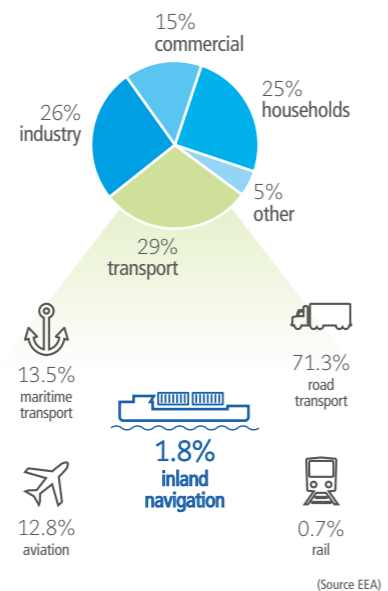
Domestic greenhouse emissions

40% LOW by 2030

below the 1990 level

80% LOW by 2050

GHG from energy sources



Transport



depends on oil and oil products for



≥94% of its energy needs,

of which 90% is imported

(Source European Commission & Eurostat)

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Future transport for industrial growth

Largely dependent on oil and taking a high share in greenhouse gases, transport is a crucial element in the new EU energy strategy. Currently, transport takes 30% of the final energy consumption in the EU. Will a 60% cut in transport emissions by 2050 be sufficient? And how to get there if transport emissions are today actually 20% higher than in 1990? The latest drop was mainly due to the economic crisis.

The Commission argues that the cheapest, safest and most secure energy is the one not consumed. **Inland waterway has a natural advantage due to its scale effect.** Three times more carbon efficient than road transport mode, it is a **cheap, carbon-low and congestion-free way to move raw materials and increasingly consumer goods.** With many cities located on waterways, no wonder local authorities are increasingly interested to supply their urban centres by water because the infrastructure exists already.

It should be no surprise either that a location on the waterfront makes sense for major raw material and recycling industries in Europe. **The low price of transporting by water at the beginning of the chain has a positive effect throughout the entire production chain resulting in competitive pricing of end products.** It illustrates the crucial role land use planning plays in building competitive

and sustainable transport systems to support industrial growth. All this makes taking away the barriers for waterway transport so important, not just within the mode but also at the interconnection with other modes and to ensure industry and society can benefit from optimal land use and transport planning.

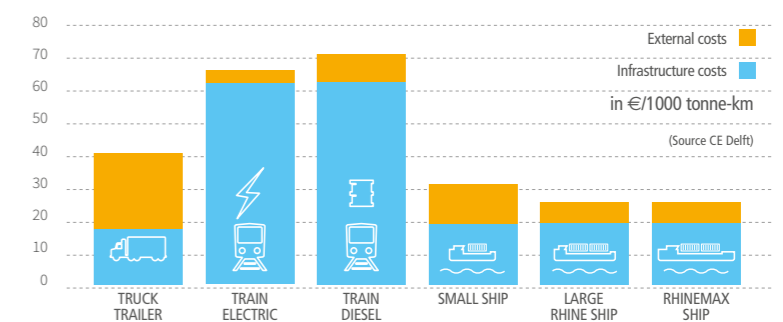
What Naiades should deliver

The worldwide greentech market is worth 2,536 billion EUR and expected to double by 2025. It leaves no doubt that inland waterway

transport will benefit from new clean and smart tech solutions in the quest for zero-emission solutions and intelligent services.

When, in addition, the waterway network is gradually upgraded, quality infrastructure will no longer be a remote dream. There will be clean refuelling options and RIS logistics will as a truly cooperative information system bundle, plan and monitor traffic between water and land. **If we can ensure Naiades helps to deliver just that with the correct mix of demand and supply measures, it will have been a great success by 2020 and provide a strong tool for future-oriented industrial development.**

Infrastructure and external costs in freight transport

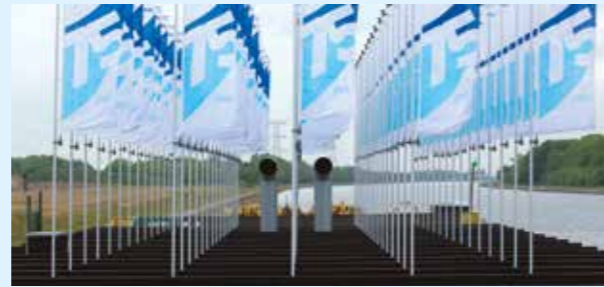


The year in pictures

APRIL

75 years Albert canal

In 2014 it was exactly 75 years since the Albert Canal was inaugurated. Today it has become Belgium's main waterway, handling over 40 million tonnes incl. 400,000 containers. Traditionally a connection for the mine and steel industry between the Limburg coal mines, the industrial basin and port of Antwerp, today the companies along the canal generate most of the traffic to escape from the increasing mobility problems on the roads. The Albert canal creates 50,000 direct and indirect jobs. Besides transport, the canal provides water supply, recreation opportunities and green energy production.



JUNE

Use of LNG on the rise

The Danser Group decided to refit the existing barge, Eiger Nordwand, with LNG as first of its kind. The engines are 99% powered by LNG but given the fact that currently the LNG refueling options are still limited, a dual-fuel concept ensures operations everywhere. The expected emission reductions are 40% less CO₂, 90% less NOx and particulate matter. Together with the LNG tank vessel Sirocco, it is part of the EU supported LNG Masterplan Rhine-Danube project which aims to promote LNG as a fuel and cargo for the inland navigation industry.



JUNE



50 years of large vessel shipping on the Moselle

June marked the 50th anniversary of the opening of the Moselle as a large-vessel waterway. For this special occasion, the Moselle Commission organised celebrations in the three countries through which the Moselle flows. In addition to an inaugural ceremony with high-ranking officials from the worlds of politics, business and public administration, a business congress and a colloquium on environmental challenges were organised. The Moselle Commission's general remit is to promote the interests of shipping on the Moselle and to ensure that the best interests of waterway users, whether involved in cargo shipping, passenger transport or recreational boating, are taken into account. In 2013, more than 14 million tonnes of goods were registered at the Koblenz lock, requiring an upgrade of the locks to meet capacity needs.

SEPTEMBER

Seine-Scheldt sails ahead

French Prime Minister Manuel Valls confirmed in Arras the determination of the government to launch the construction of the Seine-Nord canal. As part of the Seine-Scheldt connection, the new canal of 106 kilometres will allow to link the Paris region and two seaports, Rouen and Le Havre, the Scheldt and beyond, to the 20,000 km of river network of Northern Europe.

The building costs which amount to some 4.5-4.8 billion EUR are likely to be co-financed by the EU for up to 40%. The goal is for construction to start in 2017 and end in 2023 with the potential to create 12,000 to 14,000 direct and indirect jobs. Convoys passing the new waterway connection will be able to carry up to 4,400 tonnes, the equivalent of about 180 trucks, relieving the heavily congested A1 motorway by 500,000 trucks a year.



SEPTEMBER

Crane ships become mainstream but ever more innovative

Shipit and Blue Line Logistics launched two new crane ships, a further sign that cranes aboard are in demand as they do not require onshore loading equipment. This also reduces costs because the skipper can do the transshipment himself. Their size is adapted to the decreasing volumes. Crane ships transport pallets, and provide more flexibility, making them suitable for transport on small waterways and city logistics.



SEPTEMBER

European Commission wants stricter engine emission standards

Inland shipping emission standards are regulated under the regulation for non-road mobile machinery. The European Commission proposes that new ship engines placed on the market respect the same emission values as EURO6 trucks, and this as of 2017.

NOVEMBER

Welcome to the new transport commissioner Violeta Bulc

After clearing by the European Parliament, Violeta Bulc started as new Commissioner for transport. During her hearing, she showed to be a strong supporter of innovative, inclusive and sustainable transport. She emphasised Naiades should support innovation in the sector as a priority. We look forward to working with the new commissioner and her team.



NOVEMBER

BargetoBusiness & Riverdating meet in Luxembourg

Over 400 logistics players and transport officials participated in the event. It marked the end of the EU ELAN project where logistics consultants assisted inland promotion organisations to scan a number of shippers' supply chain and mapped realistic solutions to ship cargo by water.



DECEMBER

EU coordinators present corridor work plans

Throughout 2014, EU coordinators prepared implementation plans for each transport corridor in consultation with member states and infrastructure managers. The work plans identify the critical sections and bottlenecks of each corridor and the priority projects to remove them. The coordinators will facilitate where problems occur. It is now time for the implementation to begin.



DECEMBER

Danube countries commit to rehabilitation of Danube infrastructure

The current lack of fairway maintenance on the Danube is a pressing issue for the inland waterway sector and the industry using it. The EU has championed the Danube for years as a promising sustainable transport artery but unreliable navigation due to postponed maintenance investment wrecked a better use which increasingly frustrates industry. With the endorsement of the Fairway Rehabilitation and Maintenance Master Plan by the Danube Ministerial Meeting, a new milestone was reached in the coordinated cross-border effort to reach a common level of service and economic performance on the entire course of the Danube with EU support.



Building the future

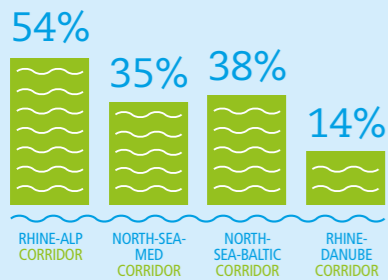
Why waterways matter

Tool for industrial development: major raw material and recycling industries in Europe heavily rely on cost-effective inbound and outbound shipments of raw materials by waterways leading to a more competitive pricing of end products.

Tool for economic growth: in densely populated corridors with strong industry presence, inland waterways keep goods moving by being the only mode of transport with spare capacity and inland ports contribute to job creation and regional development.

Tool for sustainable development: waterway transport reduces negative externalities in hinterland and urban logistics. Investments in waterborne infrastructure offer the opportunity to serve biodiversity, integrated water management, energy generation, tourism and recreation too.

Share inland waterway transport in cross-border freight flows



There is still plenty of capacity to expand traffic on the waterway.

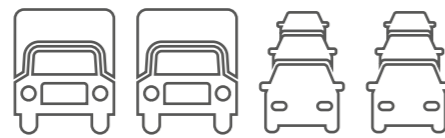
(Source EC corridor studies)

Higher co-financing boosts countries' waterway plans

If we want to make multimodal transport an obvious choice, a seamless multimodal infrastructure is the backbone so services can develop. INE lobbied hard for higher inland navigation quality criteria and co-financing rates in the new TEN and CEF regulations to make sure governments would draft a more ambitious list for inland waterway infrastructure upgrades and its integration with other modes.

Our bet was correct. During a busy year of corridor studies and consultation forums, Member States listed more waterway projects than ever which are important to the realisation of the core network creating perspectives for a better connected network.

Why we need to achieve the EU core network by 2030



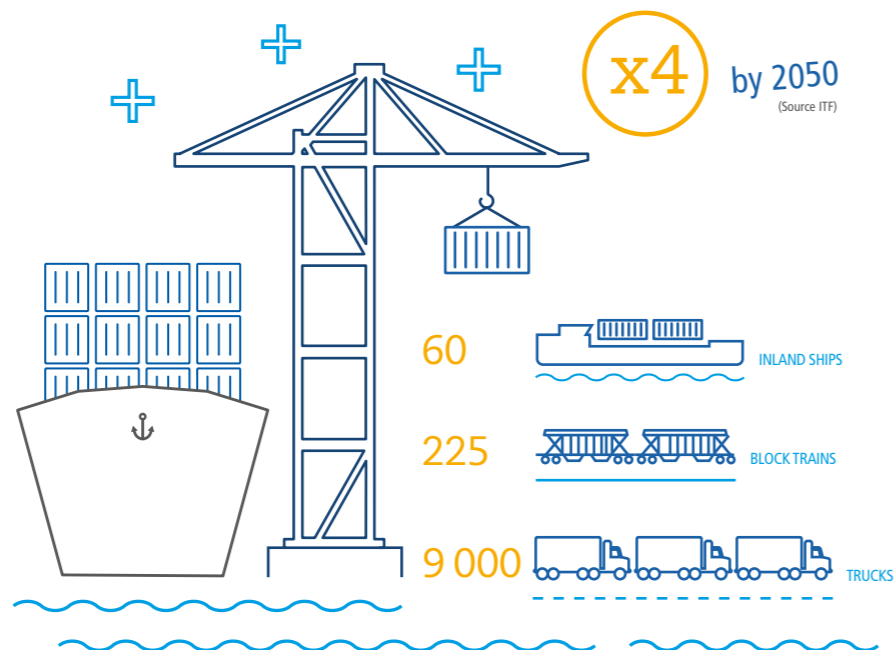
Congestion

Congestion in EU costs about 1% of GDP every year or 130 BEUR

(Source TREMOVE)

Seaport volumes are projected to increase

Seaports located on waterways will be best equipped to absorb growth. The carrying capacity of ocean ships is growing which requires an efficient hinterland system. Today's largest container carriers are 20x larger than in the 60ies and carry the equivalent of:



How to achieve the core network by 2030

WATERWAY TRANSPORT

- Fluid network cleared of bottlenecks
- International waterways meet international standards for fairway, locks, bridge clearance
- Well maintained (good navigation status)

LINKING UP TRANSPORT MODES

- Good connections to seaports
- Good connections to road and rail in inland ports
- Non-discriminatory freight access to terminals

INTRODUCING NEW TECHNOLOGIES

- Full deployment of River Information Services (RIS)
- Availability of alternative clean fuels

Attention points for implementation

Now the real work starts for the implementation towards 2020. The budget has increased from 8 BEUR in 2007-2013 to 23.5 BEUR in 2014-2020 but remains very tight for grants, hence choices have to be made. There are 3 major points of attention to prevent system breaks in the waterway network:

- The max. **co-financing rate of 40 %** is a must to avoid priority waterway projects that improve the overall functioning of the corridors are delayed or cancelled.
- Longstanding underinvestment threatens the reliability of the network with a risk of unforeseen shutdowns due to underinvestment and without available bypass. Renovation works are paramount to ensure a **good navigation status**.
- Where **longstanding critical bottlenecks** present a system break affecting the continuity of long-distance or cross-border flows but a solution is on hold, professional mediation and facilitation should take place to allow a win-win solution.

The Juncker Plan

The 2014 CEF call is likely the first and the last to cofinance a significant number of waterway infrastructure projects in the period 2014-2020. For the remaining projects there are some small leftovers, while over 18% of CEF transport money may be transferred to the EU Fund for Strategic Investments (EFSI). We have to be very careful that cutting into the grants budget does not undermine the leverage potential of financial instruments. The Juncker plan aims at projects that generate revenue. **How we all make sure that public goods projects such as waterway infrastructure get funded and financed, is a tough task from 2015 onwards.** After all, Council and Parliament decided to create multimodal corridors linking up ports with industrial and urban centres in the hinterland.



« We need to fix the infrastructure first, business will follow. »

Gerd Deimel, Lanxess Germany



Changing course



Do you know?

Freight transport activity is projected to increase by around 80% by 2050

(Source TREMOVE)



The EU aims at shifting freight transport to rail and waterborne transport from 20% today to 30% in 2030 and 50% in 2050 and reducing emissions

Inland waterway transport is

- 3x carbon efficient than road transport
- congestion-free
- enters into the heart of EU cities
- very safe
- reliable
- 500 mln tonnes annually = 5x traffic jam around the earth
- Inland ports poles of regional development

The EU programme **NAIADES 2** (2014-2020) outlines a list of measures for inland navigation transport to increase its share by becoming a quality mode of transport with the support of the EU, Member States, River Commissions and sector.

PLATINA 2 (2014-2016) is the European project assisting the European Commission with the implementation of Naiades 2. www.naiades.info

IMPLEMENTING NAIADES

Adopted in 2013, the implementation of the 2nd Naiades action plan is ongoing to increase quality in the domains of governance, education and training as well as innovation. Quality inland waterway transport which is well connected to other modes creates better opportunities for users and operators to increase the use of waterway transport to the benefit of society.

INNOVATION POWER

INE strongly believes in the innovation power of waterway transport, both in terms of organisation and technology. There are many interesting examples around, such as **the introduction of hubs and spokes, city logistics solutions, pallet transports. The use of crane vessels starts to reshape**

the market for small vessels. Next to optimized propulsion and dual fuel LNG vessels, we see the first vessels emerging that run on hydrogen and electricity, and RIS applications. We are convinced these developments will accelerate up to 2020 as part of an overall development of a greening and connected transport sector. Actually, the sustainable mobility market segment grows fastest of all the global lead markets for environmental technology and resource efficiency. All of this without talking about the Internet of Things and M2M technology that are changing the world at a rapid pace with new challenges and opportunities of big data and automation.

CONSISTENT AND LONG-TERM POLICY

Success can only be ensured when the public sector has a sustained vision and strategy. Innovation is a path full of uncertainty and commercial risk. INE advocates the EU and all member states provide clear market demand signals and support clean & smart tech growth by reducing investment risks with stable long-term policy, while clearing barriers. There is a public role as launching customer and in procurement to help support small emerging markets working towards the EU energy and climate goals for 2030. The public sector also has the horizontal network for information dissemination and partner brokering, funding and financing with strings to

get projects to the stage of commercial viability. The amount of 23 billion euro in external cost savings alone largely justifies a consistent and long-term policy to overcome the uncertainty and commercial risk to help green the fleet.

INDUSTRY AND GOVERNMENT STRONG PARTNERS FOR SUCCESS

INE believes in a supportive public role to make innovation a success. INE's members work on national and regional demand and support measures. It is good to see that a start has been made to create an EU framework too. **A stable framework is a must to overcome the commercial uncertainty for the growing green & smart tech business to develop a new niche market and for the end users to purchase competitive solutions.** All this will increase the attractiveness of waterway transport in the supply chain, which is ultimately good for society.



Digital agenda

To reap the full benefits of Intelligent Transport Systems, they have to be cooperative within and across modes. INE calls for a swift review of the River Information Services Directive to help make it happen.



« Pallet transport by inland waterways is our investment today to be prepared for tomorrow's distribution. »

Antoon Desmet, Knauf Isolava



clean ships

- Diesel electric**
up to -67% NOx
up to -98% PM
up to -32% CO₂
- After treatment & optimised design**
-80/90% NOx
-90/95% PM
- LNG ship**
-80/90% NOx
-90% PM
-40% CO₂
- Electric**
0% emissions
- H₂** Hydrogen
0% emissions

19 & 20 November in Luxembourg

At the **BargetoBusiness** conference, companies share their innovative business experiences and present why and how they use transport by water in supply chains. **Riverdating** organises business speed dating sessions between service providers and potential clients from all over Europe about all-in logistics solutions involving waterway transport.

Customers searching alternative transport options

Michael Braungart, Scientific Director EPEA and Co-Founder CradletoCradle «There are many CradletoCradle producers looking for CradletoCradle transport options for their products. This creates business opportunities for quality inland waterway transport which will allow for higher profit margins than bulk or scrap. It gives logistics a central role in the process.»

Why we need multimodality and how to create it

«The multimodal approach has to speed up. Roads cannot cope with the increasing transport needs anymore. If we want to move more to inland waterway transport, canals should be deepened, locks upgraded, intermodal hubs created, bridges raised,... we need to fix the infrastructure first before business will follow.»
 With **Arcelor Mittal, Lanxess, NPRC, Port of Antwerp, Shipit**



Good access to waterways crucial for developing new container markets

«If we want more goods on inland waterways, we need to make sure that the shippers have access to the waterways. This reduces the need for truck drivers to deliver the containers. The closer you are to the port, the cheaper you are. Transport from port to warehouse counts for 30% of the value of the product.»
 With **Bosch Siemens, MSC, DP World, Am Zehnhoff-Söns, M2O**



The renaissance of small ships and innovation opportunities

There is an increasing containerisation trend and the demand for smaller volumes is on the rise creating a huge demand for new types of shipments. Crane ships for instance allow the ship operator or skipper to do the transshipment himself, which reduces the costs of inland waterway transport. Smaller barges with palletised goods can be loaded by crane ships so that smaller waterways become accessible.
 With **Arcelor Mittal, Lanxess, Port of Antwerp, Shipit, NPRC**



How to connect information systems and support cargo bundling

«Information systems should be able to exchange data between them. The final aim is that data are only entered once and reused along the supply chain, but in a secure environment. Governments need to set the standards to make this possible. Improved data will also make bundling of cargo easier.»
 With **51Biz, Brayton Global, CFL Multimodal, CLECAT, SRS Auchan**



Sound investment climate crucial

Philippe Ledent, Senior Economist ING
 «Uncertainty and lack of credits slow down private investment. Juncker's 315 billion euro investment package could have a positive impact if invested strategically.»

We thank our sponsors: European Commission, Luxembourg Ministry for Sustainable Development and Infrastructure, ING, Port of Antwerp, Port of Mertert.

Award winners

Danser Group was awarded the Riverdating innovation award for operators as a frontrunner in logistics and technology. With its partners it developed the hub-and-spokes system for container transport by waterway to combine maritime and continental cargo. And Danser is the first to refit an existing vessel in its fleet to run on LNG.

Steelcase won the Riverdating innovation award for shippers. Together with the Paris Urban Logistics Cluster, the company set up a multimodal road-waterway service to supply the Paris urban area with manufactured goods, reducing handling, truck hauls and carbon. The development of a foldable and flexible swapbody allows an optimal loading of truck and ship. Steelcase is an early adopter of CradletoCradle production.

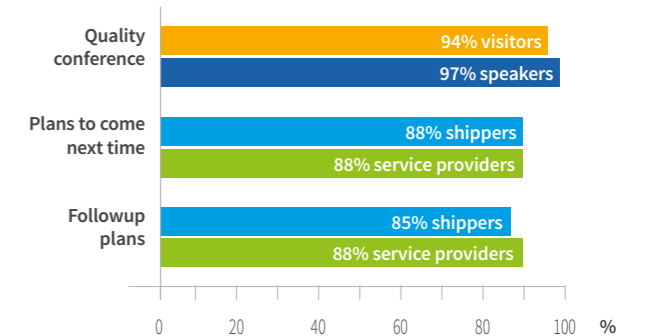


The event in figures

ATTENDANCE

Over **400** people attended

SATISFACTION SURVEY



PARTNERS AND SPONSORS

Under the EU ELAN projects, 4 logistics experts worked with shippers to explain the possibilities of shifting transport to waterways and provided assistance with the development of business cases. The experts convinced 28 shippers and the first cases are being implemented. With its focus on raising awareness and making logistics expertise available, ELAN covers a clear need to pave the way for multimodal logistics.

ELAN is a European project without commercial interest that brings together waterway operators and promotion agencies: Voies navigables de France (VNF), Inland Navigation Europe (INE), PANTEIA/NEA, Promotie Binnenvaart Vlaanderen (PBV), Stichting Bureau Voorlichting Binnenvaart (BVB), Service Public de Wallonie (SPW), Ministère du Développement Durable et Infrastructures au Luxembourg and via donau Österreichische Wasserstraßen-Gesellschaft mbH.

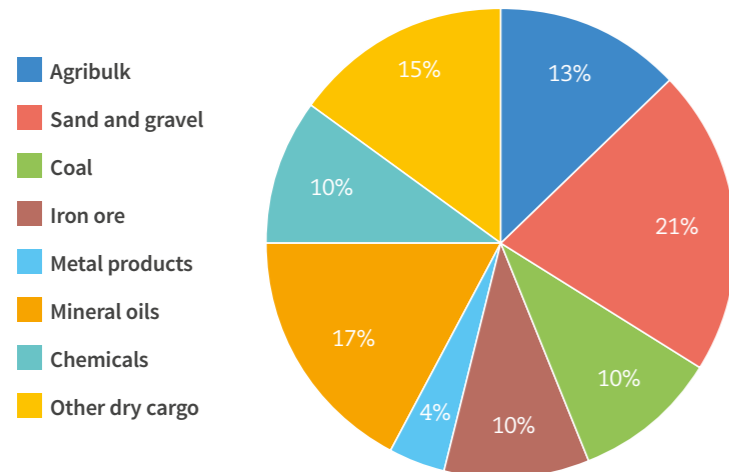
The year in figures

COUNTRY OVERVIEW

	THOUSANDS OF TONNES			MILLIONS OF TONNE-KM		
	2012	2013	%	2012	2013	%
EU28	531,452	532,075	0.1%	149,988	152,715	1.8%
Austria	10,714	10,624	-0.8%	2,191	2,406	9.8%
Belgium	190,288	187,404	-1.5%	10,420	10,365	-0.5%
Croatia	5,934	5,823	-1.9%	772	771	0.1%
Czech Republic	838	608	-27.4%	38	25	-34.2%
France	68,710	68,926	0.3%	8,916	9,213	3.3%
Germany	223,170	226,864	1.7%	58,488	60,070	2.7%
Hungary	8,135	7,857	-3.4%	1,982	1,924	-2.9%
Italy	1,700	1,695	-0.29%	133	132	-0.77%
Luxembourg	8,506	8,987	5.7%	290	313	7.9%
Netherlands	350,069	356,062	1.7%	47,533	48,627	2.3%
Poland	2,574	3,185	23.7%	131	91	-30.5%
Romania	27,946	26,858	-3.9%	12,520	12,242	-2.2%
Slovakia	8,242	8,107	-1.6%	986	1,006	2.0%

Source Eurostat & countries

TYPE OF GOODS TRANSPORTED BY WATERWAY IN 2013 (IN TONNE-KM)



2013 IN WESTERN EUROPEAN NETWORK

AGRIBULK

2013 ↑ 3.2% mainly due to the increasing role of renewable energies in the total energy consumption. Also, the total harvest in Germany has increased over the last 3 years and exports from France peaked
2014-2015 stabilisation expected

SAND AND GRAVEL

2013 ↓ 3.9% reflects economic situation in the construction sector and the lack of public investments in new infrastructure or buildings
2014-2015 small ↑ expected (+0.4%)

METAL PRODUCTS

2013 ↑ 0.7% the general increase of the total European GDP has led to a slightly larger demand for steel
2014-2015 stagnation expected

ORES AND METAL WASTE

2013 ↑ 4.7%
2014 ↑ 3.5% expected
2015 ↑ 3.5% in the transport of ores and metal waste expected

COALS

2013 ↑ 4.7% The demand for coals and ores grew due to the shutdown of the German nuclear plants and shale gas, that resulted in lower prices for coal
2014 ↑ 6.2% expected
2015 ↑ 2.5% expected

CHEMICALS

2013 ↑ 3.8% as result of an increasing demand. Waterway transport benefits from high safety and quality standards
2014-2015 ↑ 3.4% and **4.6%** expected

MINERAL OILS

2013 ↓ small decline in mineral oil products
2014 further ↓ up to 5% expected
2015 stabilisation

OTHER TYPES OF CARGO

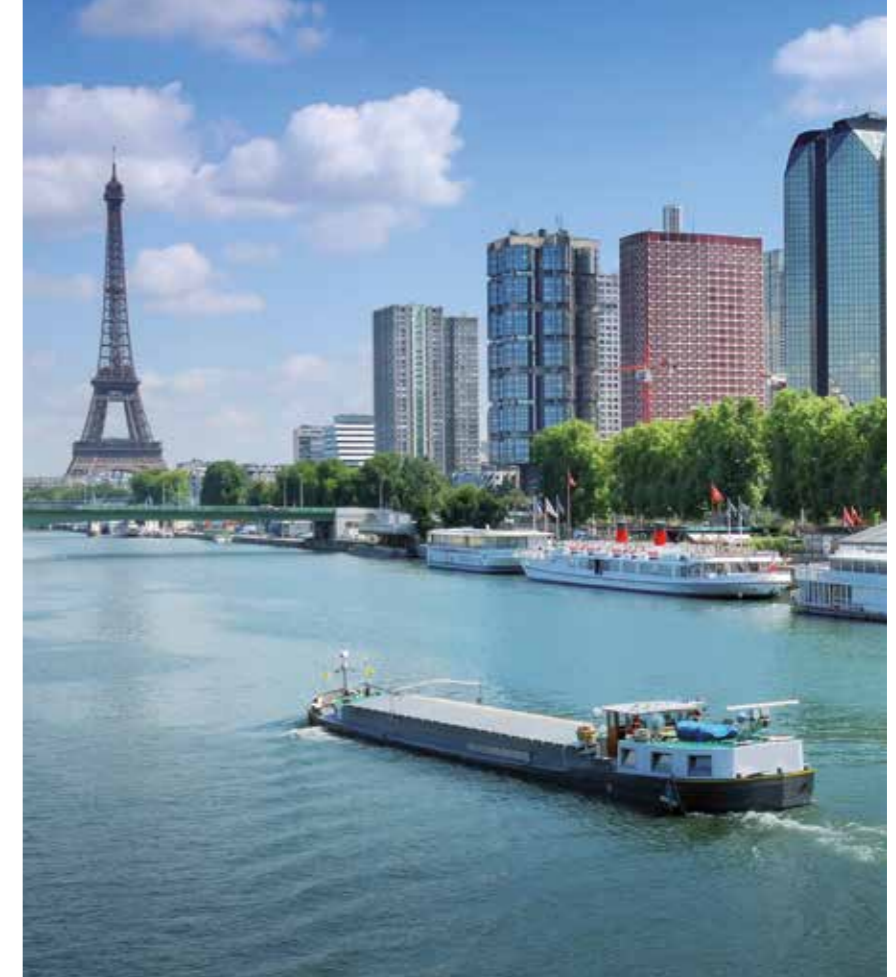
2013 ↓ 1.6% for containers
2014-2015 ↑ 1.3% and **2.5%** expected

SEINE AND RHÔNE IN FRANCE

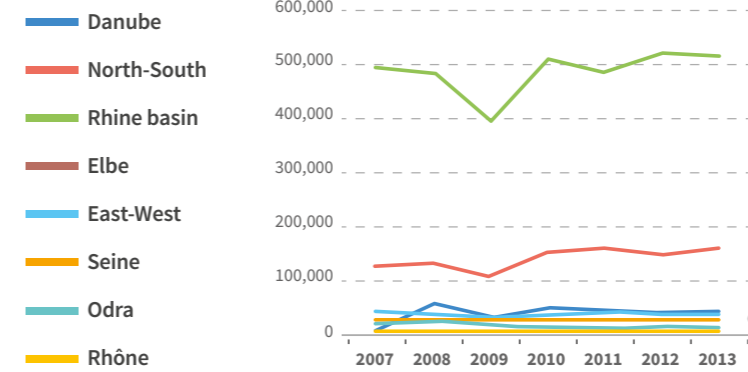
In France, transported volumes dropped in 2013 by 4.4% for the Seine river basin and 5.7% for the RhôneSaône basin. This is mainly the result of a lower demand for sand and gravel.

DANUBE WATERWAY

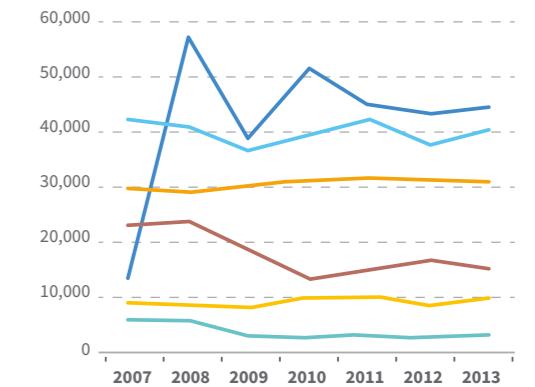
Navigation on the Middle and Upper Danube was interrupted in June due to flooding. This did not affect transport volumes on a yearly basis, crossborder imports and exports achieved roughly the same level as in 2012, while transit traffic rose. For the Lower Danube, there has been a decline in transport volumes due to lower demand for raw materials and goods that can be associated to the steel industry. In 2012, 37.2 million tonnes of goods were carried on the Danube waterway and its tributaries.



RIVER BASINS



SMALL BASINS



INE Members' highlights

AUSTRIA - VIADONAU

- Preparation Danube Masterplan for modernising Danube navigation
- Further step 2014 in TEN-T Integrated River Engineering Project East of Vienna with the successful completion of construction work at Bad Deutsch-Altenburg
- Launch of MOVE IT, the innovative Danube vessel and the NAWARO initiative for renewable resources on inland waterways



FRANCE - VOIES NAVIGABLES DE FRANCE

- Inauguration of the new Chatou lock gate to allow all year-round 24/7 passage of large-gauge vessels on the Seine up to Paris
- Finalisation of the first part of the modernisation of the canal du Rhône à Sète, including widening the canal, lifting bridges and creating waiting and crossing zones for vessels to allow increase of freight demand



BELGIUM FLANDERS - DE SCHEEPVAART – PROMOTIE BINNENVAART VLAANDEREN - WATERWEGEN & ZEEKANAAL

- Further upgrade of waterways through dredging works in the Brussels Scheldt canal, lifting and replacing of bridges on the Albert canal, widening of the Lys near Ghent and the construction of new quaywalls
- 11 business ambassadors together with chambers of commerce inform other companies about the use of waterway logistics in a three-year campaign launched to increase knowledge about inland shipping, and to provide advice



BELGIUM WALLONIA - SERVICE PUBLIC DE WALLONIE

- Works finalising the new Lanaye lock at the border with the Netherlands and at the junction with the Albert canal to open in spring 2015 followed by the new lock at Ivoz-Ramet, upstream from Liège, in autumn 2015 to allow passage for larger ships and push-convoys
- New inland navigation aid scheme (2014-2020) for waterborne transshipment equipment, regular river container services and modernisation/innovation in the fleet with up to 50% for green propulsion



CROATIA - INLAND NAVIGATION DEVELOPMENT CENTRE

- Integration inland waterway transport in the Croatian Operational programme Competitiveness and Cohesion 2014-2020 including the improvement of port infrastructure and waterways navigability
- Maintenance of Croatian and Bulgarian RIS system plus upgrade of the national ePort system (IT system for port management) and development of the water-level application for the Agency for Inland Waterways
- Organisation of 1st Logistic and Intermodal Summer School for the Danube in Novi Sad for logistics students from all over Eastern Europe



ITALY - AGENZIA INTERREGIONALE PER IL FIUME PO

- A global project for the development of the Northern Italy Waterway System to improve connections and multimodal links with existing road, rail and Motorways of the Sea axis is ongoing, as well as a study to upgrade the capacity of the Po, co-financed by EC. As the Po is a free stream river subject to low water level conditions, AIPo seeks to implement both short and long-term solutions to navigability problems by studying the impact of river regulation, linked with the project of a new Milan Cremona canal.



GERMANY - KAMMERUNION ELBE / ODER

- Call on the federal government to include the Elbe in the long-term federal transport plan, so that funding can be provided in 2016 in the Waterway Expansion Act during the 5th Capital Conference in Berlin by invitation of the Transport Committee of the German Bundestag
- Set-up of study group on the Oder in the Bundestag



LUXEMBOURG - MINISTÈRE DU DÉVELOPPEMENT DURABLE ET DES INFRASTRUCTURES

- 50th anniversary of the opening of the Moselle as a large-vessel waterway by its canalisation and the construction of several locks was celebrated with the participation of the Arch Dukes of Luxembourg and organization of economic and environmental symposia in the three countries through which the Moselle flows
- Christening of the LNG vessel Sirocco in September 2014



NETHERLANDS - KONINKLIJKE SCHUTTEVAER & BUREAU VOORLICHTING BINNENVAART

- Celebration of Bureau Voorlichting Binnenvaart's 25th anniversary
- Logistics advice to shippers in Overijssel province and launch of online routeplanner The Blue Road Map
- Koninklijke Schuttevaer focused on working with national waterway manager on construction of new chambers for the Eefde and Beatrix locks, widening the Twente canals incl. the route Delden - Hengelo, refurbishment of the locks in Driel, Amerongen and Hagestein, the second Juliana lock in Gouda, extra mooring near the Lemmer lock and the AR canal



HUNGARY - RÁDIÓS SEGÉLYHÍVÓ ÉS INFOKOMMUNIKÁCIÓS ORSZÁGOS EGYESÜLET

- Launch new Danube FIS Portal (www.danubeportal.com), which provides online fairway related information such as water level, bottleneck, notices to skippers and ice information
- Launch of DUNAPROMO campaign (www.dunapromo.hu) with the Budapest Technical University to raise awareness among two thousand students on inland navigation and its job opportunities



INE Membership

FULL MEMBERS

Agenzia Interregionale per il fiume Po (AIPo)

 Via Garibaldi 75
IT- 43121 Parma
T +39 0521 7971
www.agenziapo.it

The Interregional Agency for the Po River (AIPo), is a public body that provides engineering and environmental services across the full spectrum of operations in support of interests of the Italian regions crossed by the Po river: Piemonte, Lombardia, Emilia – Romagna and Veneto. The Basin is home to Italy's major industries, providing 46% of jobs, about 55% of livestock in only 5 provinces and 35% of the country's agricultural production. Electricity consumption accounts for 48% of the national total, thus making the Po River Basin a crucial area in the Italian economy.

Centar za razvoj unutarnje plovidbe (CRUP)

 Nova cesta 180
HR-10000 Zagreb
T +385 1 631 4445
info@crup.hr
www.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.

Koninklijke Schuttevaer (KS) - Bureau Voorlichting Binnenvaart (BVB)

 Postbus 23322
NL-3001 KH Rotterdam
T +31 10 206 06 01
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www.bln.nl

The Dutch Promotion Council for Inland Navigation (BVB) is committed to advocate

the benefits and possibilities of waterway transport to allow its target audience to see it as an attractive transportation option. Communicating the benefits and potential of the inland waterways is our core business with more waterway transport and a positive image as the final goal. Koninklijke Schuttevaer is a Dutch organisation of barge-owners/inland shipping entrepreneurs with well over 2,500 members and 19 regional and 1 international departments.

Promotie Binnenvaart Vlaanderen (PBV)

 Havenstraat 44
B-3500 Hasselt
T +32 11 23 06 06
pbv@binnenvaart.be
www.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.

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
dpvni@spw.wallonie.be
www.voies-hydrauliques.wallonie.be

The Directorate General for Mobility and Waterways of the Wallonia Public Service is responsible for managing, exploiting, maintaining and developing the Walloon inland waterways network. Within DG Mobility and Waterways, the inland waterways and intermodality promotion service has as main task to enhance the economic and recreational use of inland waterways in Wallonia, through distribution of information, organisation of promotion activities, policy measures in favour of the sector's development and contacts with economic decision makers, shippers, logistic services providers, local port authorities, etc.

via donau Österreichische Wasserstraßen-Gesellschaft mbH

 Donau-City-Straße 1
A-1220 Wien
T +43 50 4321 1000
office@viadonau.org
www.viadonau.org

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, viadonau 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.

Voies Navigables de France (VNF)

 Rue Ludovic Bouteux 175
F-62 408 Béthune
T +33 3 21 63 24 50
developpement@vnf.fr
www.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 6,700 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.

CORRESPONDING MEMBERS

- Haven van Brussel – Port de Bruxelles
- RSOE - Hungarian Association of Radio Distress-Signalling and Infocommunications
- Kammerunion Elbe/Oder

SUPPORTING MEMBERS

- Flemish Waterway Managers
- Ministère du Développement durable et des Infrastructures du Luxembourg, Département des transports

INE Structure 2013-2014

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Ivan Šuker, Centar za razvoj unutarnje plovidbe (CRUP)
Marcello Moretti, Agenzia Interregionale per il fiume Po (AIPo)

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Max Nilles, Ministère du Développement durable et des Infrastructures du Luxembourg

BRUSSELS' OFFICE

Karin De Schepper, general management
Caroline van de Leur, office management





About INE

WHO ARE WE

Inland Navigation Europe (INE) is a European platform of national & regional waterway managers and promotion bureaux actively advocating within EU institutions to promote policies which make waterways more attractive and easier to use.

WHY WE PROMOTE WATERWAYS

Europe's network of navigable rivers and canals offers access to the continent's urban and industrial centres, allowing for the more efficient, cleaner, quieter, and safer transport of goods - large and small.

That's why it is our purpose to promote waterway transport in Europe. After all, why get stuck in a traffic jam and miss deadlines when you can cut costs and deliver on time on the waterways? Increased waterway traffic is so important because it is not only cost-effective, it also cuts carbon.

WHAT WE DO

We act as a European platform

- we actively exchange knowledge & best practice among members and mount common projects
- we reach out to all players interested in multimodal transport involving waterways

We campaigned for and achieved:

- a dedicated & multi-annual EU waterway transport policy setting out policy goals and actions for market, fleet, infrastructure and qualifications (Naiades)
- all EU international waterways designated as EU core infrastructure to ensure their maintenance and upgrade where necessary by 2030
- progressively higher EU co-financing up to 40% for waterway infrastructure works of EU interest
- a framework directive to harmonise the cross-border deployment of River Information Services (RIS)
- progressively higher EU co-financing up to 50% to ensure implementation of RIS
- introduction of low-sulphur fuel for waterway vessels
- extension of 'de minimis' rule to inland waterway transport to facilitate state aid

OUR AGENDA

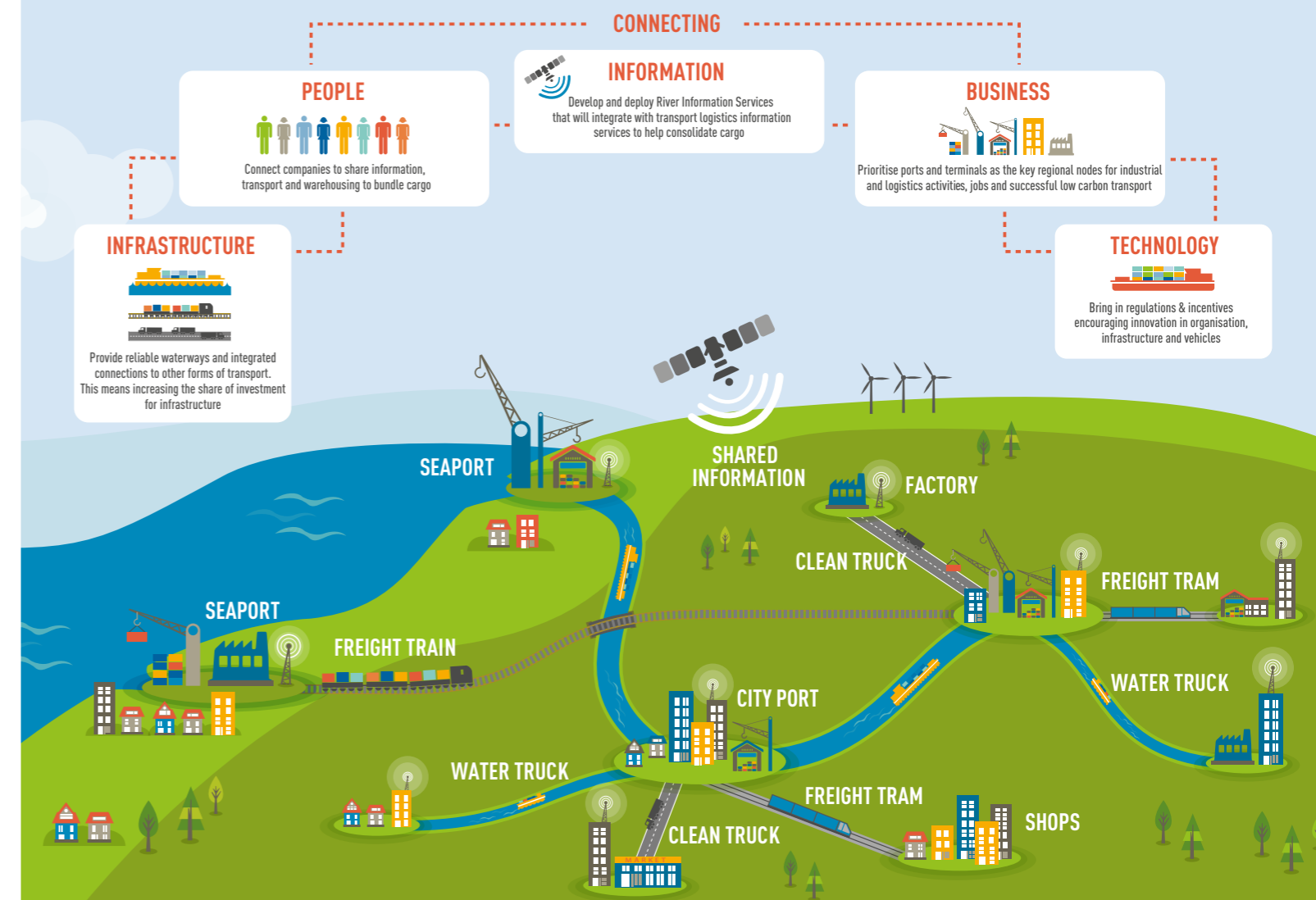
We strongly believe in a multimodal Europe to make transport & logistics more effective and less carbon-intensive at the service of European industry and society.

- a quality cross-border waterway infrastructure network with good multi-modal access
- effective cross-border River Information Services (RIS) connecting with other Cooperative Intelligent Transport Systems
- innovation policy rewarding future-oriented innovators

HOW WE GET EUROPE'S CARGO FLOWING

We live in a world of rapidly advancing technology and customer expectations. At the same time there are macroeconomic challenges including an ageing population, climate change and scarcer resources.

The key to a more sustainable supply chain is sharing. Companies who share information, transport and warehousing can bundle cargo, escape congestion and cut energy & carbon. It's a smart solution, everyone wins, business & society.





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 Inland Navigation Europe



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