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Item 4 of the provisional agenda

**STUDY OF THE CURRENT SITUATION AND TRENDS
IN INLAND WATER TRANSPORT IN MEMBER COUNTRIES**

Transmitted by the European Commission (EC)

Note: The secretariat reproduces below the Communication from the European Commission on the promotion of inland waterway transport (NAIADES): Integrated European Action Programme for Inland Waterway Transport.

COMMUNICATION FROM THE COMMISSION ON THE PROMOTION OF INLAND WATERWAY TRANSPORT (NAIADES)

An Integrated European Action Programme for Inland Waterway Transport

I. INTRODUCTION

1. Europe's freight transport system has much room for improvement. Congestion, capacity problems and delays affect mobility and economic competitiveness and are detrimental to the environment and quality of life. The EU has committed itself to pursue the goal of shifting transport to less energy-intensive, cleaner and safer transport modes. Inland waterway transport is an obvious choice to play a more prominent role in reaching these targets.

2. Concrete actions are needed to fully exploit the market potential of inland navigation and to make its use more attractive. Given that inland navigation is often a cross-border transport mode, action at both national and Community level is required.

3. This Communication sets out an integrated action programme. In order to attain its objectives, the European Commission invites Member States to play an active role in the implementation of the action programme.

II. MOTIVATION

Re-balancing the freight transport system

4. The Commission's White Paper on the "European Transport Policy for 2010: time to decide" sets out a series of targets to ensure competitiveness and sustainable mobility by 2010. The importance of these goals is underlined by the Lisbon Strategy aiming at economic growth and job creation, as well as by the Gothenburg Council (2001) on a sustainable development strategy.

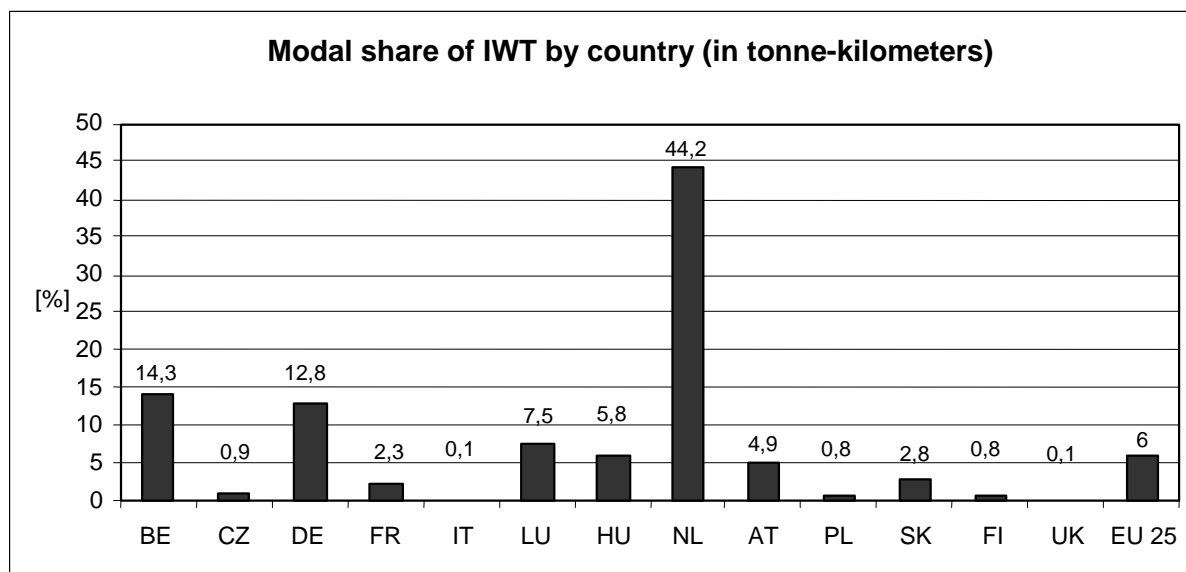
5. As a result of growing overseas trade and EU enlargement towards Central and Eastern Europe, freight transport volumes in Europe are expected to increase by one third until 2015. Present patterns of transport growth and its reliance on road transport have become a synonym for congestion and pollution, the costs of which are expected to double to 1% of Europe's annual GDP by 2010.

6. Together with rail and short sea shipping, inland waterway transport can contribute to the sustainability of the transport system, as recommended by the White Paper. In the context of a liberalised inland navigation market, the European Commission aims at promoting and strengthening the competitive position of inland waterway transport, in particular by enhancing its integration into multi-modal supply chains.

The growth potential of inland waterway transport

7. Traditionally, inland shipping has a strong position in the long-distance haulage of bulk transport. In the last two decades inland shipping has also successfully entered new markets such as the hinterland transport of maritime containers, experiencing a two-digit annual growth rate. Its expansion into the transport of continental general cargo and short distance traffic also unlocks the potential for new distribution solutions, responding better to modern logistic requirements.

8. In some regions inland shipping has already conquered a modal share of more than 40% (e.g. in catchment areas of major seaports). Moreover, between 1997 and 2004 impressive traffic growth rates (in tonne-km) in Belgium of more than 50% and in France of more than 35% have been achieved. Today the sector is made of some 12 500 vessels, corresponding to a loading capacity of 440 000 trucks. Inland navigation has the best performance in terms of external costs, in particular pollution and safety (2 ½ times better than road), and has a huge capacity to deploy. Today only 10% of the capacity of the Danube is utilised. Modal share accounts for 6% whereas in the United States navigation on the Mississippi alone accounts for 12% of the modal share in the US.



Contributing to economic growth and sustainability

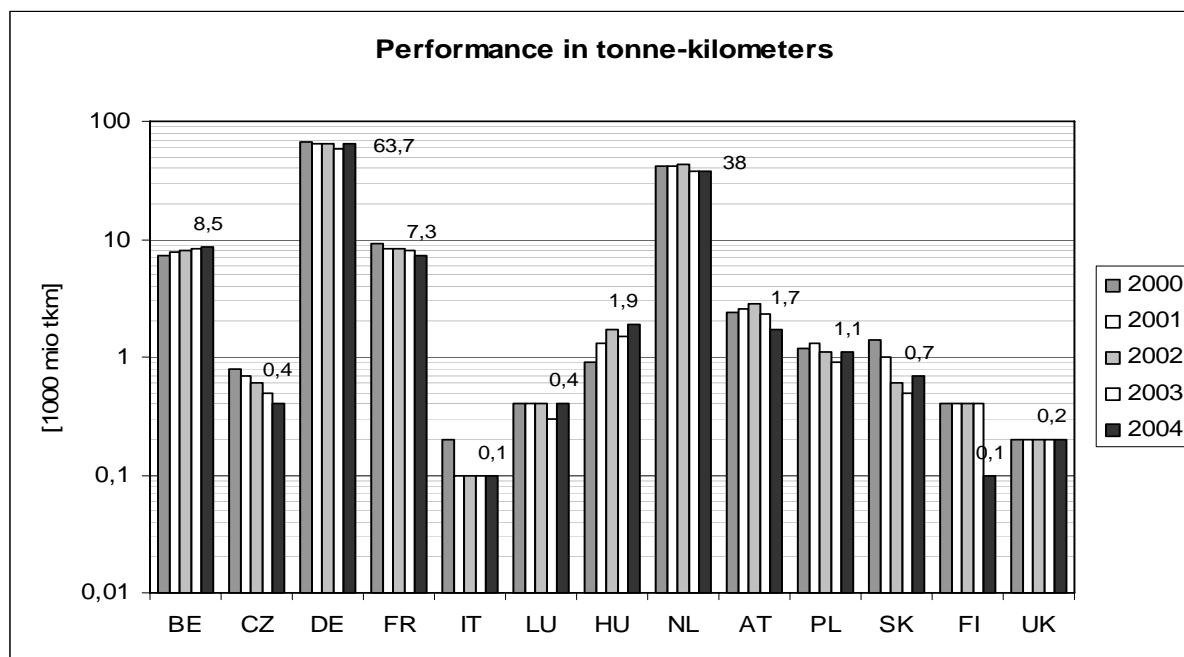
9. An increase in inland navigation can lead to significant transport cost reductions. The availability of low-cost inland waterway transport services proves to be a decisive location factor for European industry. It significantly contributes to the preservation of Europe's industrial employment. In Germany alone some 400 000 jobs directly or indirectly depend on the inland waterway sector and related companies. ^{1/}

10. Europe's waterway infrastructure has a large free capacity. Increasing transport volumes by water will usually not be as dependent on public investment and availability of land for infrastructure as with other modes. Moreover, inland waterway transport is by far safer than other modes. The number of yearly fatalities caused by accidents in the Netherlands, which has the highest density of inland waterway traffic in Europe, is next to zero.

11. Inland navigation has also been shown to be the most environmentally friendly land transport mode with total external costs currently calculated at 10 Euro per 1 000 tonne-kilometres (by comparison: 35 Euro for road and 15 Euro for rail transport). ^{2/} If inland navigation cargoes were carried by road, emissions to air in Europe would be at least 10% higher.

^{1/} Forum Binnenschifffahrt und Logistik, Handlungskonzept, Berlin, January 2005.

^{2/} COM(2002) 54.



The challenges ahead

12. With this Communication, the Commission aims at bolstering the advantages of inland waterway transport and to tackle a number of obstacles that may deprive it of certain opportunities. Inland navigation has experienced success as mentioned above but a number of hurdles still have to be overcome if it is to tap its full potential.

13. The fragmented market structure and strong competition have resulted in limited re-investment ability. Combined with the longevity of vessels, this forms a high threshold for the modernisation of vessels. Because working conditions on board and career perspectives may not seem as attractive as in other areas, the sector faces a lack of skilled labour. Public authorities and even the transport and logistics industry are often unaware of the advantages of inland waterway transport. It is often not reflected in local and regional planning processes. The inland waterway and transshipment infrastructure still faces a limited number of strategic bottlenecks and suffers from a backlog of maintenance. Construction measures meet growing environmental concerns. Information and Communication technologies such as used in River Information Services still require further development.

14. Finally, the institutional framework for inland navigation in Europe is fragmented. This leads to an ineffective use of administrative resources and a lack of political attention, which ultimately results in a complex business environment.

The need for co-ordinated action

15. This calls clearly for coordinated efforts on a medium and long-term basis by all actors involved, the industry, the European Community, Member States and other responsible parties.

III. ACTION PROGRAMME

16. The following action programme has been called “NAIADES” – **N**avigation **A**nd **I**nland Waterway **A**ction and **D**evelopment in **E**urope.^{3/} It is based on a thorough assessment and an extensive consultation with Member States and Industry.^{4/} It focuses on five strategic inter-dependent areas for a comprehensive Inland Waterway Transport (IWT) policy: Market, Fleet, Jobs and skills, Image, Infrastructure. It includes recommendations for action to be taken between 2006-2013 by the European Community, Member States and other parties concerned. They can be classified in legislative, coordination, and support measures (see Appendix 1). The implementation of the programme shall be carried out in close co-operation with national and regional authorities, River Commissions, as well as European industry.

1. MARKETS

17. Beyond its traditional strength in bulk transport, inland waterway transport has successfully expanded into high-value markets of containerised cargo in Western Europe. However, developments in the continental cargo market and in Central and Eastern Europe, though promising, are still in their infancy. New market niches have developed in the areas of waste and recycling, dangerous goods, and in the transport of vehicles and very big indivisible loads as well as in River-Sea-Shipping. The aim is to expand reliable door-to-door inland navigation services to these growth markets whilst better integrating inland navigation within the transport logistics chain.

Attract new markets

18. New multi-modal services require strong synergies and critical mass to penetrate into the market. This calls for close cooperation with freight forwarders, shipping industry and ports. Difficult access to capital hinders the establishment of new services. Solutions should be sought to overcome start-up barriers. They should facilitate co-operation between modes and foster alliances within the sector.

Encourage entrepreneurship

19. The full potential of the inland waterway transport sector’s tradition of entrepreneurship should be harnessed. High investment costs and difficult access to finance, due to the atomised character of the sector (cf. table in Appendix 2), hamper the expansion and renewal of the sector. To attract newcomers and to enable existing businesses to expand it needs better access to capital especially for SMEs. Fiscal incentives should stimulate re-investment of operational profits. State aid guidelines could provide Member States with a clear and predictable framework for subsidies in this field. An extension of the de minimis rules could also be envisaged in the context of ongoing work on state aid rules in the transport sector.

^{3/} The Naiades were the fresh water nymphs in Greek mythology. They presided over rivers, brooks, springs, lakes and marshes.

^{4/} Study “Prospects of Inland Navigation within the Enlarged Europe” (PINE), September 2004; Stakeholder workshop on 25/02/2005, Public consultation from 15/07 to 31/08/2005, Consultation meetings with stakeholders and Member States in September 2005.

Improve administrative and regulatory framework

20. The general administrative and regulatory framework should be supportive of a prosperous inland waterway sector. In line with the Lisbon objectives, administrative procedures should be assessed to consider simplification or removal and to establish a level playing-field between Member States and between modes of transport. A better coordination of all relevant public services and policies should streamline necessary formalities.

| Instruments | Responsible actors |
|--|--------------------|
| ▪ State aid guidelines for support schemes and possibly de minimis rules | EC |
| ▪ Support programmes to promote modal shift and facilitate investment (incl. research and fiscal incentives) | MS |
| ▪ EU RTD and support programmes (FP7, Marco Polo, CIP, INTERREG) | EU/MS/Industry |
| ▪ Funding Handbook for IWT | EC |
| ▪ Administrative one-stop-shops and IWT focal points | EC/MS |
| ▪ Screening for barriers in existing and new European and national legislation | EC/MS/Industry |
| ▪ Harmonisation of manning requirements, vessels and boatmasters' certificates, intermodal documentation, liability, and loading units (ILU) | EC/EU |

EC: European Commission, EU: European Union, MS: Member States

2. FLEET

21. Inland navigation is an efficient, safe and environmentally friendly mode of transport. Its increased use complies with the objectives of transport and environment policy. However, continuous investments in modernisation and innovation are still needed to maintain its head start in these fields.

Improve logistics efficiency, environmental and safety performance of IWT

22. Efficient technology usually results in higher logistics efficiency and lower operating costs. These can be achieved by targeted fleet innovations, e.g. vessel design, further automation, including ICT. Innovative concepts for operations and transshipment of large and small vessels should be investigated and facilitated.

23. The introduction of technologies to further reduce fuel consumption and harmful emissions from new and existing vessels, e.g. hydrodynamics, improved propulsion, fuel-efficiency, filtering, will allow inland shipping to maintain its high standards. Research into commercially viable non-carbon fuels, e.g. hydrogen fuel cells, and zero-emission engines should also be pursued. The use of biofuels, especially biodiesel, should be exploited.^{5/} Adapting vessels' design and standards to the conditions of particular rivers should be considered.

^{5/} Cf. Directive 2003/30/EC.

24. The safety record of inland shipping, though exemplary, can be further improved by on-board and on-shore information technology (River Information Services), navigational equipment, vessel design, as well as by training and education.

25. Innovation can take place both through the construction of new vessels (long-term) and the refit of existing vessels (short- and mid-term). To facilitate rapid market transfer of new technology, the legal framework for environmental and safety standards (engine emissions, fuel quality, waste disposal, dangerous goods transport) should be reinforced. R&D activities should concentrate on the development of refit concepts accompanied by support programmes (including pilot tests), fiscal incentives and training. The potential of the Inland Waterway Reserve Fund, created under Council Regulation (EC) No 718/1999 and financed by the profession, could also be reassessed in order to improve its use and to examine the possibility of additional sources of financing.

| Instruments | Responsible actors |
|--|--------------------|
| <ul style="list-style-type: none"> ▪ State aid guidelines for support schemes and possibly de minimis rules | EC |
| <ul style="list-style-type: none"> ▪ Support programme to facilitate efficiency, environment and safety-enhancing technologies (incl. research and fiscal incentives) | MS |
| <ul style="list-style-type: none"> ▪ EU RTD and support programmes (FP 7, lead projects for sector innovation) | EU/Industry |
| <ul style="list-style-type: none"> ▪ European IWT Reserve Fund (Regulation (EC) No 718/1999) | EU/MS/Industry |
| <ul style="list-style-type: none"> ▪ Funding Handbook for IWT | EC |
| <ul style="list-style-type: none"> ▪ Improvement of environmental and safety legislation (incl. engine and cargo emissions, waste disposal, fuel quality, transport of dangerous goods) | EU |

3. JOBS AND SKILLS

26. Staff and entrepreneurial shortage has become a major problem. In the 1990s this could partly be counterbalanced by technological innovations and enhanced mobility of crew members from countries inside and outside the EU.

Attract workforce

27. Improving working and social conditions through a constructive social dialogue at European level must be at the heart of such a strategy. The definition of EU-wide professional qualification requirements through greater mutual recognition of qualifications, e.g. via the European Qualifications Framework (EQF), will enhance labour mobility. Additionally, recruitment initiatives could create awareness beyond the sector on the job and career opportunities in inland shipping.

Invest in human capital

28. A functioning education and training system is a fundamental condition for a sound and competitive labour market. The existence of education and training institutions in the sector has to be secured and their curricula adapted to current managerial, technological, linguistic and

nautical needs. Conversely, knowledge on inland navigation should also be included in logistics education programmes. Modern learning tools such as simulators for navigation in unknown and critical areas need to be introduced in curricula. Life-long-learning should be encouraged.

| Instruments | Responsible actors |
|--|--|
| <ul style="list-style-type: none"> ▪ Social dialogue within sector (working conditions, working time arrangements, definition of EU-wide professional qualification requirements, etc.) ▪ Recruitment campaigns ▪ Funding Handbook for IWT ▪ EU support for projects in the area of education and training (e.g. the Community Education and Training or RTD programmes - FP 7) ▪ European Social Fund (ESF) ▪ European IWT Reserve Fund ▪ Specific training programmes for IWT needs ▪ Common framework for education and training standards ▪ Harmonisation of manning requirements and boatmasters' certificates | <p>Social partners (Sectoral Dialogue Committee) MS/Industry EC EU/Industry/education & training institutes EU/MS EU/MS/Industry EU/education & training institutes EU/MS EU</p> |

4. IMAGE

29. The image of the inland navigation sector has not kept pace with the logistics and technological performance achieved. General awareness and knowledge of the real potential of the sector in terms of quality and reliability need to be improved.

Promote inland navigation as a successful partner in business

30. Improving the image of inland navigation is a joint responsibility of the industry, politics and administrations at national and European level. Promotion activities aimed at logistics decision-makers could be supported and co-ordinated to establish a consistent and positive image of inland navigation and to pave the way for a re-balanced transport system.

Set up and expand European IWT promotion and development network

31. Some Member States have set up promotion structures providing up-to-date information to industry on the opportunities, and assisting in the development, of inland navigation. The establishment of promotion centres combined with the appointment of national focal points will generate smooth interfaces between authorities and industry and facilitate result-oriented policy. This is demonstrated by comparing growth statistics of countries with and without such structures. A Europe-wide network of national promotion and development centres should be set up or expanded, including candidate and associated countries.

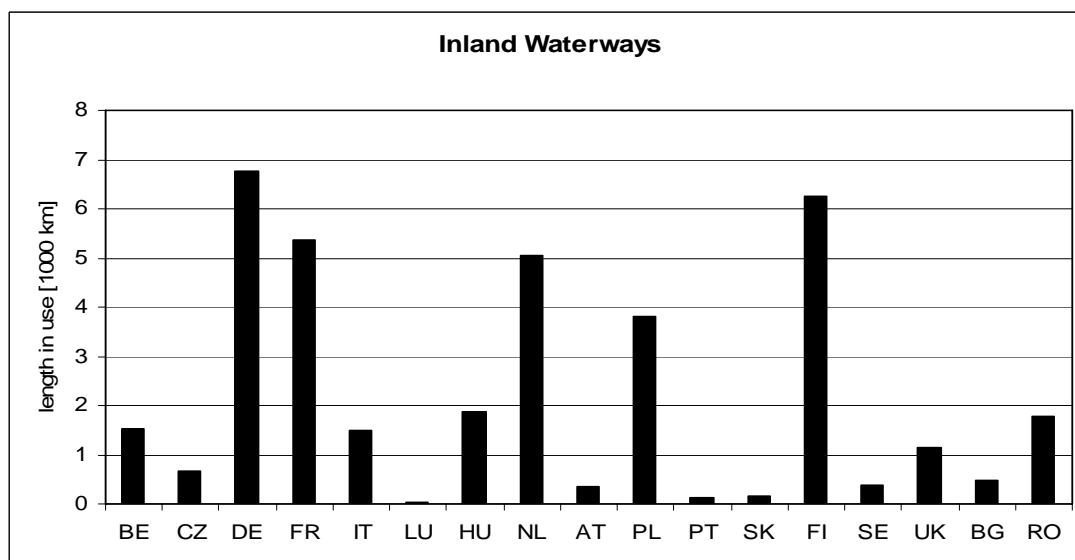
Monitor trends and developments within the IWT market

32. Permanent observation of relevant economic and social parameters is crucial for business, policy-makers and authorities in order to anticipate market trends. Current statistics are not detailed enough for this purpose. A pre-condition for any market observation is the availability of comparable and compatible source data. National administrations should be encouraged to provide this data. An updated EU regulation on statistics of goods transport by inland waterways, currently in the legislative procedure, can contribute to this objective. A European Market Observation System involving the CCNR, the European Commission and the professional organisations is currently being established and in due time will have to be re-assessed and adapted. It should include economic and social parameters.

| Instruments | Responsible actors |
|--|--|
| <ul style="list-style-type: none"> ▪ Support programmes for national promotion and development organisations and their network ▪ Regulation on statistics of goods transport by inland waterways ▪ IWT Market observation | <p>EU/MS/ Industry</p> <p>EU</p> <p>EC</p> |

5. INFRASTRUCTURE

33. More than 36 000 kilometres of waterways and hundreds of inland ports connect many important economic areas in Europe. Even though the larger part of the waterway network has ample free capacities, several bottlenecks caused by limited draught, bridge clearance and lock dimensions hinder its full utilisation and reduce the competitiveness of inland waterway transport.



Improve multi-modal network

34. A European Development Plan for improvement and maintenance of waterway infrastructures and transshipment facilities should be initiated to make trans-European waterway transport more efficient while respecting environmental requirements. It should provide guidance

for financing and prioritise improvement and maintenance of waterway infrastructures, transshipment facilities and eliminate bottlenecks while reconciling different policy objectives, e.g. transport, energy, environment, and sustainable mobility. Such a plan should be oriented along the TEN-T network,^{6/} but also include smaller networks. A European Coordinator could facilitate its implementation.

35. A framework for infrastructure charging for all transport modes, which would internalise external costs such as accidents, air pollution, noise and congestion, could contribute to funding opportunities. In addition, if fully applied across all modes, such a framework would favour the use of inland navigation. The Commission will launch a consultation process linked to the issue of infrastructure charging.

36. Given existing backlog for the development of transshipment facilities and access to waterways, support is required, especially in new Member States and accession countries. Support should concentrate on growing market segments. Innovative strategies and significant investments are also required to better accommodate inland vessels in seaports. Spatial planning and economic policies are needed at federal, regional and local levels to safeguard waterside sites for logistics purposes.

Implement River Information Services

37. River Information Services (RIS) support the planning and management of traffic and transport operations. They contribute to a more efficient and safer use of waterways, locks, bridges and terminals by optimising electronic data interchange and logistics operations. It is invaluable for waterway authorities in supporting traffic management tasks and dangerous goods monitoring, and will become of great use for commercial actors. RIS will lead to increased competitiveness and improved safety, and needs to be implemented and further developed in a coordinated way within the trans-European networks.

| Instruments | Responsible actors |
|---|---------------------------|
| <ul style="list-style-type: none"> ▪ European Development Plan for improvement and maintenance of waterway infrastructures and transshipment facilities | EU/MS |
| <ul style="list-style-type: none"> ▪ European Coordinator | EC |
| <ul style="list-style-type: none"> ▪ TEN-T funding for Priority projects No 18 and No 30, other projects of common interest, port and terminal development | EU/MS |
| <ul style="list-style-type: none"> ▪ RIS Directive and projects (TEN-T MIP) | EU/MS |
| <ul style="list-style-type: none"> ▪ EU RTD and support programmes (FP 7, PHARE, ISPA, CARDS, INTERREG) | EU |
| <ul style="list-style-type: none"> ▪ National funding schemes for infrastructure improvement and maintenance | MS |
| <ul style="list-style-type: none"> ▪ Framework for infrastructure charging | EU |
| <ul style="list-style-type: none"> ▪ Spatial planning giving higher priority to (re-)developing industrial zones nearby waterways | MS |
| <ul style="list-style-type: none"> ▪ Interdisciplinary dialogue on planning and project level | EC/MS |

^{6/} Cf. Decision No 884/2004/EC of the European Parliament and of the Council.

IV. MODERNISATION OF THE ORGANISATIONAL STRUCTURE

38. The proposed Action Programme foresees actions as diverse as regulatory harmonisation, strategic promotion, and specific support and coordination measures. It can only develop its full potential if it is implemented in a coherent way.

39. The present organisational structure, however, is characterised by fragmentation of resources and efforts at different levels. Today a skipper is faced with coexisting sets of rules stemming from the European or National legislator, from the Central Commission for Navigation on the Rhine (CCNR) or the Danube Commission.^{7/} This results in an overall lack of efficiency and political impact.

40. There is agreement that the current framework has to be modernised. The process has already started.^{8/} To be viable, any changes should on the one hand respect current achievements and on the other hand offer added value in terms of efficiency, legitimacy, political strategy, cost-effectiveness, and bring forward regulatory harmonisation in a pan-European perspective. Any changes should also take into account existing obligations under international agreements connected with Rhine and Danube, and other waterways to which Member States, and third countries, are signatories. Different options are currently under discussion:

- a. Further increasing the cooperation between the international river commissions and the European Commission, sustained by “Memoranda of Understanding”, would maintain the existing framework and working methods but require increased coordination between the works of these organisations.

Such cooperation can already be observed in the area of technical requirements for vessels. Other areas are being explored. However, it maintains the fragmented legal bases for IWT and the different sets of rules for different geographical areas within the single market.

- b. The adhesion of the European Community to the Rhine and the Danube Commissions^{9/} would strengthen the Community’s participation beyond its current observer status. However, it was not yet possible to reach a political agreement on this approach. Such an accession would more truly reflect the fact that the Community already today has exclusive competence in a number of areas.
- c. The creation of an intergovernmental Pan-European Inland Navigation Organisation, on the basis of a new international convention, would aim to involve all European countries and organisations interested in IWT in a single coordinating body.

While raising IWT’s political attention and strategic policy profile, it would not avoid the labours of rendering coherent different sets of rules. It would also add a new institutional

^{7/} The Central Commission for Navigation on the Rhine is based on the revised Mannheim Convention of 1968. Its members are Belgium, France, Germany, the Netherlands and Switzerland. The Danube Commission is based on the Belgrade Convention of 1948. Its members are Germany, Austria, Slovakia, Hungary, Croatia, Serbia and Montenegro, Romania, Bulgaria, Moldavia, Ukraine and Russia.

^{8/} Cf. Recommendation of 1 August 2003 from the Commission to the Council in order to authorise the Commission to open and conduct negotiations on the conditions and arrangements for the European Community’s membership of the CCNR and of the Danube Commission - SEC(2003) 897; Report of the “EFIN Group”: A new institutional framework for the European Inland Navigation, October 2004.

^{9/} As proposed by the Commission in 2003 (see footnote 8 above).

layer, beyond existing legal frameworks, which may take a long time, as it will require signature and ratification of all parties concerned.

d. Another option would be to entrust the Community to strategically address the development of IWT in Europe. Among the current actors, the Community is the only one empowered to adopt a single set of rules encompassing the whole territory of the Union. On that basis, it is in a position to develop a strategic and comprehensive IWT policy for the single market. However, the EU inland waterway market has connections with third countries (Switzerland, Croatia, Serbia and Montenegro, Romania, Bulgaria, Moldavia, Ukraine, Russia), the interest of which must be taken into account. Furthermore, due account must be taken of the fact that, historically, the international river commissions have acquired important knowledge and expertise that should be utilised.

41. On the basis of further discussions with all stakeholders and taking into account progress in the implementation of this Action Programme, the Commission will come forward with a proposal for stimulating the process of modernising the organisational structure of Inland Waterway Transport.

V. CONCLUSION

42. In order to enable inland waterway transport to fully exploit its potential and to make its full contribution to the transport policy objectives, a number of framework conditions need to be improved.

43. In this Communication, the Commission sets out an integrated action programme focusing on five strategic areas that are fundamental for the further development of the inland waterway transport sector. These key areas are rounded off by considerations for modernising the organisational structure. Such modernisation is deemed necessary to assist the implementation of the programme.

44. The various actions and measures indicated in the programme shall be further elaborated following deliberation in Council and Parliament. On this basis, the Commission will present, if appropriate, legislative proposals and implement the policy measures. Each of these proposals will be preceded by a thorough impact assessment. The time frame for the implementation of the plan is the period 2006 – 2013.

45. According to the principle of subsidiarity, the programme is addressed to all levels responsible for inland waterway transport, the industry itself including the social partners, the Member States having the responsibility for the infrastructure networks, the European Commission and the other institutions. In cooperation with these actors, the Commission will regularly monitor the progress of the implementation of the Action Programme.

46. The Commission invites the European Parliament and the Council to endorse this Communication and to support the Action programme.

Appendix 1

« NAIADES » Action Programme Overview

A. LEGISLATIVE INSTRUMENTS

| | |
|---|---------|
| HARMONISATION OF: | |
| ▪ technical requirements for vessels | Ongoing |
| ▪ intermodal loading units (ILU) | 2006 |
| ▪ statistics of goods transport by inland waterways | 2007 |
| State aid guidelines for support schemes and possibly de minimise rules for IWT | 2007 |
| Harmonisation of: | |
| ▪ transport of dangerous goods | 2007 |
| ▪ engine emissions | 2007 |
| Reinforcement of position and normative framework of IWT | 2008 |
| Harmonisation of: | |
| ▪ boatmasters' certificates | 2008 |
| ▪ intermodal liability | 2008 |
| ▪ manning requirements | 2009 |
| ▪ waste disposal | 2009 |
| ▪ education and training standards | 2009 |
| ▪ intermodal documentation | 2010 |
| ▪ infrastructure charging | 2013 |
| ▪ fuel quality | |

B. POLICY INSTRUMENTS

| | |
|--|--------|
| TEN COORDINATOR INLAND WATERWAYS | 2006 |
| Funding Handbook for IWT industry | 2006/7 |
| Screening for barriers in existing and new European and national legislation | 2006/7 |
| Administrative one-stop-shops and IWT focal points | 2006/7 |
| Social dialogue within sector | 2006/7 |
| IWT Market observation | 2008 |
| European Development Plan for waterway infrastructures and transshipment facilities | 2009 |
| Recruitment campaigns | |
| Spatial planning giving higher priority to (re-)developing industrial zones nearby waterways | |
| Interdisciplinary dialogue on project level | |

C. SUPPORT INSTRUMENTS

| | |
|--|--------|
| EUROPEAN IWT RESERVE FUND | 2007/8 |
| National support programmes | |
| ▪ Promote modal shift, facilitate investment | |
| ▪ Efficiency, environment and safety technologies | |
| ▪ Promotion and development organisations | |
| ▪ Infrastructure improvement & maintenance | |
| European RTD and support programmes | |
| ▪ Services: Marco Polo, CIP, INTERREG, etc. | |
| ▪ Fleet: RTD programmes (FP 7), etc. | |
| ▪ Jobs and skills: SOCRATES, LEONARDO DA VINCI, etc. | |
| ▪ Infrastructure | |
| - TEN-T Priority projects 18&30 | 2013 |
| - RIS (TEN-T MIP) | |
| - PHARE, ISPA, CARDS, INTERREG, etc. | |

Appendix 2**Inland Waterway Transport Enterprises**

2002

| | Country | Number of Enterprises | Turnover million € | Number of persons employed |
|----|-----------------|-----------------------|--------------------|----------------------------|
| 1 | Belgium* | 235 | 163.1 | 735 |
| 2 | Czech Republic | | | |
| 3 | Germany | 1257 | 1690.7 | 11223 |
| 4 | France | 1176 | 476.7 | |
| 5 | Italy | 711 | 211.9 | 2959 |
| 6 | Luxembourg | 103 | 42.7 | 1212 |
| 7 | Hungary | 105 | 66.1 | 1920 |
| 8 | Netherlands | 3510 | 1374.0 | 9207 |
| 9 | Austria | 59 | 83.0 | 330 |
| 10 | Poland | | | |
| 11 | Portugal | 26 | 23.4 | 838 |
| 12 | Slovenia | 20 | 0.4 | 26 |
| 13 | Slovakia | | | |
| 14 | Finland | 85 | 21.6 | 252 |
| 15 | Sweden | 393 | 69.5 | 1021 |
| 16 | United Kingdom | 217 | 165.5 | 1921 |
| | EU 25 | 7662 | 4225.5 | 30909 |
| 17 | Bulgaria | 12 | | |
| 18 | Romania | 102 | 77.8 | 4123 |

*2001

Source: Eurostat (economic activity according to NACE Rev. 1 classification)

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