

**Economic and Social Council**Distr.: General  
29 September 2017

Original: English

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**Economic Commission for Europe****Inland Transport Committee****Working Party on Inland Water Transport****Sixty-first session**

Geneva, 4-6 October 2017

Item 4 of the provisional agenda

**Exchange of information on measures aimed  
at promoting transport by inland waterway****Current situation and trends in inland water transport****Note by the secretariat\*****I. Mandate**

1. This document is submitted in line with Cluster 5: Inland Waterway Transport, paragraph 5.1 of the programme of work 2016-2017 (ECE/TRANS/2016/28/Add.1) adopted by the Inland Transport Committee at its seventy-eighth session on 26 February 2016.

2. The Working Party on Inland Water Transport may wish to exchange information on the current situation and trends in inland navigation in the UNECE region based on the information below, which was prepared by the secretariat on the basis of the data available.<sup>1</sup>

**II. Performance: Market observations made by the Central  
Commission for the Navigation of the Rhine**

3. Market observations on European inland navigation are regularly prepared by the Central Commission for the Navigation of the Rhine (CCNR), in close collaboration with the European Commission (EC). These are available on the CCNR website at <http://ccr-zkr.org/13020800-en.html#04> in English, French, German and Dutch.

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\* The present report was submitted after the deadline in order to reflect the most recent information.

<sup>1</sup> Unless otherwise indicated, the information was received by the secretariat in communications from the Governments of the countries.

The annual report of 2016 provides a complete overview of the market situation and of developments in European inland navigation in 2016 and a detailed analysis of the transport volumes on major European waterways and in principal European inland ports. A summary is reproduced below.<sup>2</sup>

4. Since 2013, the European Union (EU) has enjoyed a rather limited but steady economic growth that has positively influenced inland navigation activity and the activities of the transport industry as a whole. The improved economic growth has been improved as compared to 2013 and is expected to continue in the coming years. In 2016, goods transport on inland waterways in the EU region totalled almost 145 billion tonne-kilometres, with 85 per cent as an ongoing important share in the Rhine countries (of Belgium, France, Germany, Netherlands and Switzerland).

5. The 145 billion tonne-kilometres transported in 2016 represents a decrease of 1 per cent from 2015. The greatest decline was in eight main European countries in terms of inland navigation, led by Luxembourg, France and Germany, with 19, 2.5 and 1.7 per cent respectively.

6. In Luxembourg and France, inland navigation activity is largely the transport of agricultural products. Thus, the poor harvests in 2016 significantly affected traffic in both countries.

7. Transport performance in Germany and in the Netherlands was significantly affected by two periods of low water in the Rhine region at the end of 2015 and of 2016.

8. Container transport in the EU increased by 4.6 per cent to reach 15 billion tonne-kilometres; the distribution of container transport on inland waterways in the EU shows that more than 99 per cent of total container transport on EU inland waterways currently takes place in four countries: Belgium, France, Germany and the Netherlands.

9. Performance of passenger transport is also increased, due to the segment of river cruises, and reached a total of 1.36 million passengers.

10. In 2016, freight transport by EU inland waterways continued to maintain a modal share of 6 per cent of all freight transport (by inland navigation, road, rail and pipeline). This modal share rises to nearly 40 per cent in countries with dense waterways networks, such as the Netherlands.

11. However, inland navigation activity in 2016 showed a dependency on the overall economic context, though also on external factors, such as low water conditions that had an impact on the Rhine traffic at the end of 2015 and of 2016, and on the Danube navigation in 2015.

12. On the other hand, the transport of goods on inland waterways benefited from the dynamism of container transport, waste transport and chemical transport. On the Rhine, all three experienced growth rates of between 3 and 5 per cent in 2016 compared to 2015. Likewise, the dynamic steel industry activity in the Upper Danube area significantly boosted the transport of ores and metal products on the Danube.

13. The inland navigation fleet structure evolved slowly in Europe; the EU fleet size decreased by 2.8 per cent. However, the overall fleet remains rather old; dry cargo and tanker cargo vessels are an average of 50 and 39 years old, respectively. The utilization rate of the fleet remains between 55 and 85 per cent depending on the vessel types, which is below the pre-economic crisis levels. Sector turnover is, therefore, very much dependent on freight rate fluctuations.

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<sup>2</sup> [www.inland-navigation-market.org/en/2159-2/](http://www.inland-navigation-market.org/en/2159-2/).

14. Inland ports are vital in developing inland shipping. Good quality infrastructure in ports and the promotion of inland waterway traffic by the port, can have an important positive influence on the development of this transport mode. A detailed analysis of inland port activity enables one to identify individual port trends and specializations and to highlight port initiatives to promote inland navigation.

15. Innovative projects emerged locally and the sector of new vessel construction saw a partial shift towards greening. This is particularly true for river cruises, where approximately one quarter of the new vessels entering into service in 2016 were powered by diesel-electric engines. However, one of the main challenges of inland navigation in the coming years will be to expand innovations to a larger scale in the market. Today it remains limited to specific examples. This is, for example, the case for all innovative measures aimed at reducing emissions from inland navigation transport.

### **III. Measures for promoting the development of the inland waterway infrastructure**

#### **A. International events**

16. The ministerial conference “Promoting Connectivity in the CEI<sup>3</sup> Region: Bridging the Gap between Europe and Asia” took place in Minsk on 8-9 June 2017. The thematic panel discussions focused on the modernization of the transport and logistics infrastructure in the context of EU strategies for developing the TEN-T corridors<sup>4</sup> with the involvement of international financial institutions, the facilitation of trade through the harmonization of customs, rules of origin and value appraisal procedures, tariff and non-tariff regulation, industrial, sanitary and phytosanitary standards. The participants also discussed the promotion of the concept of so-called digital transport corridors through the development of paperless trade systems, mutual recognition of electronic shipping documents, online sales platforms for small and medium-sized businesses and cross-border digital services.

17. The Memorandum on the preparation of the proposal for the water corridor Danube-Oder-Elbe was signed by the Czech Republic, Poland and Slovakia on 31 January 2017 in Warsaw. The purpose of this Memorandum is to continue developing and expanding the framework of cooperation among the Parties within the framework of the Working Group on the water corridor Danube-Oder-Elbe. The participants expressed the intention to launch a working platform on navigation on the Oder river within the existing Working Group on the water corridor Danube-Oder-Elbe for the further cooperation among other interested countries.

18. The twenty-first Oder-Havel Colloquium (3 September 2017, Schwedt (Oder, Germany)), organized by the Verein zur Förderung des Stromgebietes Oder/Havel e.V.<sup>5</sup> in cooperation with the Interreg Baltic Sea Region Project EMMA,<sup>6</sup> was dedicated to container transport and the regional development on the Havel, the Oder and the Vistula rivers. The following topics were addressed: (a) promoting the expansion of ports to multimodal logistics nodes; (b) digitalizing inland water transport; (c) developing inland water transport infrastructure and bottlenecks; and (d) constructing special types of container vessels for

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<sup>3</sup> The Central European Initiative.

<sup>4</sup> Trans-European Transport Network set out by Regulation (EU) No. 1315/2013 of the European Parliament and of the Council of 11 December 2013.

<sup>5</sup> Association for the Promotion of the Oder-Havel river basin; for details, see <http://oderverein.de>.

<sup>6</sup> Interreg Europe programme; for details, see [www.interreurope.eu](http://www.interreurope.eu).

rivers and canals. The potential and promotion of container transport was emphasized for increasing the modal share of inland water transport, and for seaport hinterland traffic. Positive examples included container transportation on inland waterways in Sweden and a pilot project on container transport from the port of Gdansk to Warsaw on the Vistula river.

## **B. Inland waterways infrastructure projects in the core network corridor Rhine-Danube and national projects in Slovakia**

19. Studies and works for a cross-border bridge connecting Komárom to Komárno, a CEF<sup>7</sup>-funded project in accordance with Directive (EU) No. 1315/2013,<sup>8</sup> are under way at the stage of public procurement.

20. The national project to upgrade the Gabčíkovo locks (2016-2020) should increase lock capacity, decrease waiting times, and modernize the vessel traffic management system. Specifically envisaged are: replacement of the upper and lower gates, upgrade of the system to fill and empty the lock, stabilize the subsoil, and replace the control system.

21. The international project FAIRway Danube (2015-2020) is ongoing, and is a follow-up of the Fairway Rehabilitation and Maintenance Master Plan of the Danube and its tributaries. A detailed proposal will maintain and restore the Danube fairway, modernize the waterways, ensure stable or improved navigation conditions, and increase vessel capacity. Currently, public procurement is under way.

22. A contract for has been concluded for a feasibility study of the navigability of the lower Váh from Komárno to Piešťany.

23. A national project to modernize the port of Komárno includes a Master plan and a feasibility study for developing port infrastructure in terms of new commodity flows and new loading/unloading capacities. The overall objective of the project is to ensure the appropriate functioning of the port as an element of the TEN-T Core network.

24. The Operational Programme for Integrated Infrastructure (2016 -2020) includes:

(a) A national project on technical measures to ensure the required fairway parameters of the Danube at rkm<sup>9</sup> 1880.260-1708.200: the project aims to obtain and evaluate factual data on navigability of the Danube; propose actions for ensuring and improving, where necessary, the fairway parameters taking into account the economic, social and environmental aspects;

(b) Creation of a database for management and planning: currently, the contract is in preparation;

(c) Modernization of infrastructure at the public port of Bratislava to meet the requirements for a passenger port: currently, the contract is in preparation;

(d) Construction of a terminal for liquefied natural gas at the public port of Bratislava: a feasibility study shall identify the most suitable technology for producing and distributing liquefied natural gas at the port. These shall follow the European requirements for the implementation of alternative fuels. Market research and preparation of public procurement are scheduled for the end of 2018, and construction should being in 2019.

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<sup>7</sup> Connecting Europe Facility; for details, see <https://ec.europa.eu/inea/en/connecting-europe-facility>.

<sup>8</sup> <http://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32013R1315&from=EN>.

<sup>9</sup> River kilometre.