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Working Party on Inland Water Transport  
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agenda item 4)

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

**Note by the secretariat**

At its forty-sixth session, the Working Party invited Governments and River Commissions to transmit information on the latest developments regarding: (i) inland navigation infrastructure; (ii) movement of goods; and (iii) policy issues with a view to enabling the secretariat to prepare a succinct report on this item by its forty-seventh session (TRANS/SC.3/158, para. 12).

Reproduced below is a summary of information on the three above-mentioned subjects prepared by the secretariat on the basis of information available.

## I. INLAND NAVIGATION INFRASTRUCTURE DEVELOPMENT

1. A major event which took place in European inland waterway infrastructure development was the inauguration on 30 August 2002 of the formal opening and putting into operation of a 27 km section of the Canal du Centre in Belgium. The upgrading of the Canal from Class I to Class IV took 20 years and was achieved through the realization of a number of exceptional hydraulic works, such as the Strépy-Tieu shiplift (73.15 m high), the Sart canal bridge of 500 m and the White Bread guard gate at La Louvière which prevents the accidental draining of the 40 km reach connecting the Strépy-Tieu shiplift (Canal du Centre), the inclined plane at Ranquières and the lock at Viesville (Charleroi-Brussels Canal). The Canal du Centre represents an important inter-basin water link connecting two great rivers, the Schelde and the Meuse, providing for a direct high-capacity navigation route from northern France to Belgium, the Netherlands and Germany.

### **Belarus**

2. In accordance with the "Programme for the development of transport by inland waterway and sea for the period up to 2010", the reconstruction of dams on the Dnieper-Bug Canal at Novosady, Trishin, Vygoda and Vetly has been accomplished. The reconstruction of the Novosady navigable lock is currently approaching completion.

### **Belgium**

3. The construction of a second lock chamber at Evergem on the Gent Circular Canal is to be completed in mid-2007. The dimensions of the new lock chamber will be 230 x 25 m (class VIb). The existing Evergem Lock, built in 1965 (136 x 16 m), is not capable of coping with the ever growing volume of traffic (more than 13 million t in 2001) on this important artery linking the Gent-Terneusen Canal with the Upper Schelde, representing a part of the future Seine-Nord Europe Waterway.<sup>1/</sup>

### **Bulgaria**

4. The Ministry of Transport and Communications of Bulgaria envisages the following projects within the Port of Lom, the western-most Danubian port that can be reached by sea-going ships from the Black Sea:

- (i) Rehabilitation of the existing infrastructure;
- (ii) Concessioning of a multi-purpose terminal, a grain terminal and a general cargo terminal;
- (iii) Concessioning of a dry-bulk terminal.

5. The preliminary cost of the project is 27 M euro, of which 17 M is secured by a European Investment Bank (EIB) loan.

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<sup>1/</sup> Navigation, ports et industries, 30 June 2002.

## **Czech Republic**

6. During the last two years a "Programme for the promotion of transport by inland waterway for the period up to 2005" has been being implemented through: (i) the reconstruction of high-capacity locks on the canalized section of the River Elbe with a view to achieving new target parameters for the channel; and (ii) extension of the navigable part of the River Elbe up to Pardubice including a section of the river between Chvaletice and Prelouc. At the same time, preparations are under way for the improvement of navigable conditions on the regularized section of the Elbe from Usti nad Labem to the State border. Meanwhile, the programme of assistance to ports development and improvement of inland waterways used for recreational navigation has been carried out. Following the catastrophic results of the 2002 flood on the Elbe and Vltava Rivers, the Ministry of Transport had to undertake a special anti-flooding programme preparing ports and inland waterways for floods and restoring damaged hydraulic works.

7. The Ministry of Transport of the Czech Republic is preparing a feasibility study for stage 1a of the future Danube-Oder-Elbe Connection. This stage envisages in particular, the construction of a multimodal transport terminal (freight village) in Breclav. The study is to be completed by 2004. The Ministry is currently in consultation with neighbouring States (Austria, Slovakia), as well as with relevant authorities of the EU.<sup>2/</sup>

## **Finland**

8. The new Tahko waterway with two new locks was opened to traffic in June 2002. Situated in eastern Finland's north-east of city of Kuopio, this new waterway serves mainly passenger traffic and recreational navigation.

## **France**

9. The increase in inland waterway traffic by 22% over the last five years demonstrates the great potential of this alternative mode of transport, the development of which is based first of all on modernizing the network, optimizing its operation and improving its interface with other modes of transport.

10. Modernization of the inland waterway network ensuring the carriage of goods is being carried out within the plan of contracts for the period 2000-2006 between the State and the regions. For the first time, the plan includes an important section on inland waterways. The State and the French Inland Waterways (VNF) have thus contracted more than 350 million euros with the regions concerned.

11. This programme co-financed with 800 million euros is aimed at the development of outlets on the waterway link Seine – Nord Europe (the basins of Pas-de-Calais and Seine-Oise) which should be accompanied by a high-performance inland navigation service at Port 2000 in Le

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<sup>2/</sup> Presentation by Mr. J. Kubec, Director of the Danube-Oder-Elbe Association, at the European Inland Waterway Navigation Conference (Győr, 11-13 June 2003).

Havre, currently under study. Progress in the performance of this contracted programme and in the restoration of the priority network for the transport of goods is expected to reach 40% by the end of 2003.

12. A recent debate on major infrastructure projects in Parliament has allowed deputies to express their views on all rail, road or inland waterway projects, financed or not since many years.

13. In this framework, the Government has reaffirmed that if the priority for inland water transport continues to be the restoration of the network, the lock of the Port of Le Havre, given its current state, is nevertheless relevant in the framework of the 2000 Port project and the project Seine-Nord Europe is planned to head the list of the waterway related projects to be realized in the European context.

14. It is recalled that among the findings of the Van Miert High-Level Group on trans-European transport networks, the Seine-Nord Europe project has been listed as a special priority project. At the same time, the abandonment of the high-capacity water connection Rhine-Rhône remains justified, given the importance of its direct and irreversible impact on the lifestyle in the regions concerned. Finally, as far as the high-capacity water connections Saône-Moselle (currently under study) and Seine-Est (between the Seine and the Moselle) are concerned, the development of rail transport represents a more immediate alternative to road transport on these axes.

### **Germany**

15. The Federal Traffic Infrastructure Plan 2003, which encompasses long-term planning up until the year 2015, is currently being drafted.

16. The current draft section of the Plan on inland waterways includes as priority, investment into four new projects as follows (in addition to a number of running projects and projects under confirmed engagement (which are either pending from earlier Federal Traffic Infrastructure Plans or included in the Investment Programme)):

- (i) the deepening to 3.30 m of the navigable channel in the lower River Main between its confluence with the River Rhine and Aschaffenburg;
- (ii) the improvement of navigable conditions on the River Danube between Straubing and Vilshoven as per Variant A through river-engineering measures excluding barrages;
- (iii) the improvement of navigable conditions on the River Saal in the form of a lock canal (without a weir);
- (iv) the construction of parallel lock chambers along the River Moselle.

**Lithuania**

17. In addition to the inland waterways of international importance, E 41 (Klaipeda-Kaunas), E 70 (Curonian Lagoon-Klaipeda) and E 60 (coastal waterway), the following inland waterways have been rated by the Lithuanian Government as being of State importance: Rivers Nemunas, Neris, Minija, Nevezis, Curonian Lagoon, King Wilhelm and Mituva Channels. The following rivers and water basins have been given the status of inland waterways of local importance in a Decree of the Minister of Transport: Neris, Skirvyte, Dane, Shysha, Trakai lakes, etc.

**Republic of Moldova**

18. The future of the inland navigation industry is dependent mainly on the development of the shore-based infrastructure at Giurgiulesti. Currently, negotiations are underway to find an investor to complete construction of the oil terminal on the Danube and construction of a cargo and passenger complex at the mouth of the Prut River.

**Russian Federation**

19. On inland waterways of international importance in the Russian Federation, only three sections remain which decrease significantly the efficiency of use of the fleet of inland navigation vessels:

- (i) the Kochetovski Hydroelectric Complex, due to insufficient depth at the sill of the existing lock (E90);
- (ii) Section Gorodets-Balakhna on the Volga River, due to extremely low water depth; and
- (iii) insufficient traffic capacity of the Volga-Baltic waterway (E 50).

20. The existing Kochetovski Lock, built in 1919, no longer satisfies the needs of navigation since its parameters are insufficient for ensuring safe passage and does not allow high-tonnage vessels, especially tankers, to pass the lock at full load using to the utmost the parameters of the rest of the waterway.

21. The investment project "Reconstruction of the Kochetovski Hydroelectric Complex on the River Don including the construction of a parallel lock" envisages two stages:

- (i) First stage - reconstruction of the existing works of the Kochetovski Complex; and
- (ii) Second stage - construction of a parallel lock.

22. The first stage, to be financed by the Federal budget, is aimed at preventing the deterioration of the walls of the lock chamber, safe operation of the lock and shortening the locking time.

23. The second stage of the project is aimed at enhancing of the competitiveness of transport of foreign trade goods between the Azov Sea and the Tsimlinskoe Reservoir, as well as the upgrading of traffic capacity on the whole of the waterway.

24. On the River Volga between Gorodets and Balakhna, the depth of the channel has resulted in an extremely difficult situation during the navigational period.

25. Given the existing depth limitations on that section, dredging works have been carried out there since the operation of the Gorky Hydroelectric Complex in 1956. Together with a natural watering down of the river bed, the water level in the lower reach of the lock complex has decreased by 90 cm. This has resulted in significant idling time of vessels waiting for locking at the Gorki Hydroelectric Complex, the need to operate vessels significantly under-loaded and, practically, a complete standstill for large passenger vessels.

26. Forecasts suggest that without relevant measures, in 2005-2007 the depth just downstream of the locks will decline to 1.4 m during the navigational period. Vessels with a draught of 2.8 m will be able to pass through the locks during 8 hours a day up to the end of May and during 2 hours a day in July-November period.

27. A reasonable solution to this problem could be the construction on this section of the Volga River of a low step transport hydraulic complex combined with a road bridge just upstream of Nizhniy Novgorod.

28. From 1997 to 2001, the volume of goods traffic on the Volga-Baltic Waterway (VBW) grew 2.5 times. The majority of goods carried (more than 60%) represent transit foreign trade. In 2002, 15 million t were carried on the VBW. During peak load periods, the capacity of the Lower Svir Lock is used to the limit.

29. To increase the traffic capacity of the VBW by 20 million t per year, the following urgent measures should be taken:

- (i) completion of the fairway enlargement of Canals Nos. 61 and 62;
- (ii) completion of reconstruction of a mooring wall on the upper approaching canal (UAC) of Lock No. 5;
- (iii) construction of a mooring and guiding wall in the upper reach of Lock No. 5;
- (iv) increase in dredging works on the watershed canal.

30. The subsequent stages should be: (i) the reconstruction of moorings of UAC to Locks Nos. 1 and 2; (ii) the construction of a mooring on the canal between Locks Nos. 4 and 5; (iii) the enlargement up to 80 m of a lower approaching canal (LAC) for Lock No. 2; (iv) the enlargement of a canal between Locks Nos. 3 and 4 combined with the construction of an embankment on the left bank of the River.

31. Further increases in traffic capacity on this waterway will only be possible through the construction of parallel locks.

32. The elimination of bottlenecks on inland waterways of international importance in the Russian Federation will increase the safety of navigation and the efficiency of the use of inland navigation vessels. It will also create conditions for establishing international navigation.

## **Slovakia**

33. In view of the decisions of the Pan-European Conference on Inland Water Transport (Rotterdam, 5 and 6 September 2001) and the Memorandum of Understanding on the Pan-European Transport Corridor VII (Danube) and with due regard to Decree No. 469 of 31 June 2000 of the Slovak Government concerning the Concept for the development of transport by inland waterway, the bodies concerned should pay special attention to the elimination of limiting sections of the Danube waterway.

34. Within Slovakia, the Danube (E 80) continues to limit navigation on the following sections: (i) from the mouth of the Morava River (1872.7 km) to Bratislava (1869.1 km); (ii) the section just downstream of the Gabčíkovo hydroelectric Complex (1811.0 km) to the mouth of the Ipel River (1708.2 km). These sections do not meet the requirements of the European Agreement on Main Inland Waterways of International Importance (AGN).

35. The experience of hydrotechnical works in the bed of large rivers shows that to achieve the recommended parameters of the fairway in accordance with the decisions of the Danube Commission and to ensure the reliable functioning of Pan-European transport corridor VII, a final solution can not be found without the construction of hydraulic works creating water steps.

36. Creation of a water step just downstream of the Morava would put an end to all the limitations to navigation on the joint Austrian/Slovak section of the Danube. It would also contribute to the construction of a water connection Danube-Morava-Oder (-Elbe) (E 20 and E 30). The construction of a water step just downstream of the Ipel would create navigable conditions at the mouth of the Vah River (E 81) and would allow the reconstruction of this waterway including the creation of the Vah-Oder navigable canal.

37. The Slovak Republic also supports the recent initiative of the Republic of Hungary to resume work on the Tisza River aimed at creating navigable conditions. This would extend navigation to the rivers Bodrog, Laborec and Latorica in the eastern part of Slovakia.

## **Switzerland**

38. In the Ports of Basel (access to port basin No. 2), the height under the rail bridge has been increased to 7.00 m, allowing container-carrying vessels to pass under the bridge with three layers of containers loaded.

39. Thirty million Swiss francs are to be invested in basin No. 2 of the Ports of Basel by Rhénus-Alpina for the development of a new container terminal combined with a logistical center. The new terminal will extend to 10,000 m<sup>2</sup> and is expected to enter into operation in autumn 2003. Another terminal is also under construction in the Port of Birsfelden (Bale-Campagne). Upon completion, the Ports of Basel will have four container terminals.

## Ukraine

40. The total length of navigable inland waterways in the Ukraine in 2003 amounted to 2,084 km, which is 178 km less than in 2000. Waterways with a guaranteed depth of the channel of 3.65 m constitute 934 km. 979 km of waterways are temporarily closed for navigation. As to infrastructure development plans, the most important continue to be: (i) a project to create a navigable connection between the Kilia Arm of the Danube and the Black Sea; and (ii) ensuring appropriate navigable conditions on the Dnieper River, including in particular, the repair of locks; as well as (iii) establishment jointly with Belarus and Latvia of a navigable waterway Dnieper-Daugava.

## United Kingdom

41. British Waterways has, together with its partners, initiated a 10-year programme to create new and restore old inland waterways. The programme has so far succeeded in opening 200 miles of inland waterways.<sup>3/</sup>

## II. MOVEMENT OF GOODS

42. Global economic developments were disappointing in 2002. Hopes for the beginning of a sustainable recovery from the recession of 2001 were frustrated. In the first quarter of 2003, overall economic activity in the euro zone stagnated following a minor increase in real GDP (0.1%) in the last quarter of 2002. At the same time, despite some slowing down of activity in eastern Europe and the CIS in 2002, rates of economic growth in these regions remained generally higher than those in western Europe. Aggregate GDP for the CIS grew by 4.8% in 2002 while the growth of aggregate GDP in eastern Europe was considerably lower (3%). In the first quarter of 2003, economic activity in the east European and CIS regions generally remained buoyant and in a number of countries, growth rates even improved.<sup>4/</sup> The situation in the inland water transport sector reflected to a certain extent, these economic developments on the continent.

### International rivers

#### *Rhine*

43. The years 2001 and 2002 saw a downturn trend in the volume of Rhine goods traffic at German/Netherlands border (- 2.5% and - 1.3%, respectively).<sup>5/</sup> It should be recalled, however, that the year 2000 represented an absolute record both in transport volume and transport performance. Transport of containers was marked in 2002 by continued growth of some 7.8% in traditional Rhine traffic, reaching 1.333 million TEU.<sup>6/</sup> Freight tariffs, for both bulk liquid and dry cargoes remained stable at a rather low level reflecting the state of demand.

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<sup>3/</sup> Inland Navigation Europe (INE), Newsletter No. 1, 1 December 2002.

<sup>4/</sup> UNECE Economic Survey of Europe 2003 and UNECE Economies in mid-2003.

<sup>5/</sup> CCNR Press releases of 30 May 2002 and 3 June 2003.

<sup>6/</sup> Navigation, ports et industries, 15 July 2003.



44. The extremely dry weather in the spring and summer of 2003 decreased the water level on the River Rhine to a level not seen in years. As a result, barge operators were restricted in the amount of cargo they were able to load on barges.

#### *Moselle*

45. Goods traffic on the Moselle, after a record 2000 level of 16 million t fell to 15.4 million t in 2001 and to 14.2 million t in 2002 at the Koblenz Lock. At the Apach Lock, the volume of traffic was maintained in the year 2001 at the level year 2000 (9.7 million t) and declined slightly to 9.6 million t in 2002.

#### *Danube*

46. After the UN sanctions against the former Yugoslavia were lifted in November 1995, traffic on the Danube started to recover having bottomed out in 1994 (19.9 million t). In 1997, the volume of goods traffic amounted already to 26.8 million tonnes showing some 9% annual growth rate. Since April 1999, however, when as a result of the Kosovo conflict, bridges were destroyed at Novi Sad in Yugoslavia, the volume of traffic fell again and was carried out mainly on the upper Danube and to/from the Main-Danube Canal. Since then, Danubian shipping companies have been bearing considerable losses due to the lack of free and regular navigation via the Yugoslav section of the river.

47. According to the latest statistics however, since 1999 (24.4 M t) the volume of goods traffic on the Danube has grown each year and reached in 2002 31.7 M t (see the table below).

Volume of goods carried on the Danube in 2001 and 2002<sup>7/</sup>  
(1,000 t)

Countries	Goods leaving the countries		Goods carried within the country (cabotage)		Total goods movement		
	2001	2002	2001	2002	2001	2002	%
Austria	1,258	1,555	1,206	561	2,464	2,116	-14.1
Bulgaria	303	392	949	1,402	1,253	1,794	+43.2
Croatia	89	96	223	12	312	108	-65.5
Germany	7,777	8,331	...	...	7,777	8,331	+7.1
Hungary	3,432	3,452	...	...	3,432	3,452	+0.5
Republic of Moldova	...	...	...	...	...	...	...
Romania	140	678	7,652	8,606	7,792	9,284	+19.1
Slovakia	1,164	...	...	...	... <sup>8/</sup>	...	...
Ukraine	3,952	5,539	548	649	4,499	6,188	+37.5
Serbia and Montenegro	342	...	2,284	...	... <sup>8/</sup>	...	...
Goods brought to the Danube from the sea					541	395	-27.0
Total <sup>8/</sup>					28,070	31,668	+12.8

<sup>7/</sup> Data received from the secretariat of the Danube Commission.

## European Union

48. Over the past 30 years, performance of freight transport by inland waterway within the European Union increased from 102 billion tonne-km in 1970 to 125 billion tonne-km in 2000. However, the share of inland waterway transport in total land transport has continuously decreased from 12% in 1970 to 7% in 2000 (road, rail and pipelines represent respectively 75%, 13% and 5%).

49. The share of inland waterway transport in total transport performance by individual member countries amounted in 2000 to 13.6% in Germany (66.5 billion t-km), 42.6% in the Netherlands (41.3 billion t-km), 2.2% in France (7.3 billion t-km), 11.9% in Belgium (6.3 billion t-km), 5.4% in Austria (2.4 billion t-km), 1.3% in Finland (0.5 billion t-km), 8.9% in Luxembourg (0.3 billion t-km), 0.1% in Italy (0.2 billion t-km) and 0.1% in the United Kingdom.

50. In 1998, the total volume of this mode of transport in the European Union was 739 M tonnes. National, international and transit transport accounted respectively for 28%, 61% and 11%.

51. Germany and the Netherlands are the two main countries contributing to the importance of this activity. In 2000, they accounted for nearly 75% of goods carried in Europe. <sup>2/</sup>

52. In the EU accession countries, the performance of transport by inland waterway amounted in 1999 in total for 8.5 billion tonne-km. The share of inland waterway transport in total transport performance by individual candidate countries amounted in 1999 for: 9.1% in Romania (2.8 billion t-km), 9.3% in Slovakia (1.66 billion t-km), 5.6% in Hungary (1.59 billion t-km), 1.7% in the Czech Republic (0.91 billion t-km), 0.7% in Poland (0.84 billion t-km), 2.8% in Bulgaria (0.72 billion t-km). <sup>10/</sup>

## Austria

53. Transport by inland waterway has been steadily growing on the Austrian section of the Danube since 1994 with the exception of 1999, seemingly, as a result of the halt of navigation at Novi Sad.

54. This is illustrated in the table below reflecting the volume of goods in 1000 t carried on the Austrian section of the Danube during 1994-2002. <sup>11/</sup>

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<sup>8/</sup> To compare data for 2001 and 2002, the total does not include data for Serbia and Montenegro nor Slovakia since they are available only for 2001.

<sup>9/</sup> Statistics in focus: Transport, Eurostat, 6 August 2002.

<sup>10/</sup> Prospects of inland navigation within the enlarged Europe. Draft deliverable 3.

<sup>11/</sup> Statistisches Jahrbuch 2003. Schifffahrt und Strom No.182, May/June 2003 (data on 2002).

Year	International traffic	Domestic traffic	Transit traffic	Total	%
1994	5,101	433	2,170	7,704	
1995	5,390	522	2,880	8,791	+14.1
1996	6,103	539	2,661	9,303	+5.8
1997	5,847	699	2,658	9,204	-1.1
1998	6,232	965	3,041	10,236	+11.2
1999	6,435	773	2,777	9,987	-2.4
2000	6,641	1,147	3,193	10,980	+9.9
2001	6,865	1,205	3,564	11,634	+6.0
2002	7,867	561	3,889	12,317	+5.9

### Belarus

55. The volume of freight transport by inland waterway amounted in 2002 to 1,610 thousand t, which was 6.3% more than in 2001. In 2003, it is expected to amount to 1,968 thousand t.

### Belgium

56. The volume of goods loaded and unloaded on inland waterways of Belgium rose steadily from 1998 to 2001 as reflected in the table below. <sup>12/</sup>

Goods loaded (1000 t)			Goods unloaded (1000 t)		%
1998	2001	2001/1998	1998	2001	2001/1998
55,754	64,295	+15.3	66,570	80,085	+20.3

57. In the Flemish Region, after an exceptional year in 2000, the performance of inland water transport increased further in 2001 by 4% and amounted to 4.2 billion t-km. Tonnage carried however, rose by just 2.13% and reached 64.7 M t in 2001. <sup>13/</sup>

58. In the Walloon Region, traffic by inland waterway continued the progress started early in the 1990s. In 2002, its performance reached 1.555 billion t-km (2.5% more than in 2001) while the tonnage of goods moved by inland waterway stayed unchanged and amounted to 42 M t, the same as in 2001. <sup>14/</sup>

### Bulgaria

59. Contrary to the decline in the performance and tonnage carried by other modes of transport (with the exception of pipeline transport), inland waterway transport demonstrated a modest but stable rise in recent years as demonstrated in the table below.

<sup>12/</sup> Navigation, ports et industries, 15 June 2002.

<sup>13/</sup> Navigation, ports et industries, 30 September 2002.

<sup>14/</sup> Navigation, ports et industries, 28 February 2003.

	1,000 000 t/km				1,000 t			
	1999	2000	2001	2002	1999	2000	2001	2002
All transport modes	88,538	88,136	81,937	76,377	135,356	96,001	95,000	111,822
Inland waterways	320	397	365	571	1,469	1,846	1,300	1,621

### Croatia

60. Croatian inland navigation also started to recover just after the end of the Kosovo conflict. In 2001, 1,123 thousand tonnes were carried by inland waterway which was 7.5% more than in 2000 (1,045 th. t) and 35% more than in 1999 (833 th. t). Nevertheless, it was still much less than the volume of goods carried in the pre-crisis year 1990 (2,713 th. t).

### Czech Republic

61. Transport performance and tonnages carried by inland waterway continued to decline, especially after the year 1995, as seen in the table below:

	1995	1997	1998	1999	2000	2001	2002
Volume of traffic 1000 t	4,440	1,828	1,856	1,890	1,906	1,594	1,512
Transport performance M t-km	1,348	783	928	914	773	606	543

62. This negative tendency persisted in the first quarter of 2003 in the volume of goods carried (-8.5%) but reversed into a positive one as far as the performance of transport by inland waterway was concerned (+23.7%), due in part to a much greater average transport distance (643 km instead of 476 km) observed in that quarter compared with the first quarter of 2002.

### Finland

63. The total volume of goods carried on Finnish inland waterways in 2002 (3.8 M t) declined in comparison with 2000 (4.4 M t) by 13.3%. At the same time, tonnage carried on the Saimaa Canal continued its dynamic growth since 1996 and amounted in 2002 to 2.1 M t compared to 1.76 M t in 2000. The main commodities carried on inland waterways were: timber, raw minerals, paper and cellulose.

### France

64. After a record year 2000, traffic by inland waterway experienced a slight downfall in 2001 and started to recover in 2002 (see the table below). The 2002 growth was due to domestic transport performance, whereas international traffic decreased (+8.6% and -2.7%, respectively). Early in 2003, traffic by inland waterway continued to be stable. It should be noted that within the five years from 1997 to 2002, inland waterway transport performance has shown a remarkable general progress of 22%.

	1993	1994	1996	1997	1998	1999	2000	2001	2002
Transport performance 1,000,000t-km	4,09	3,75	5,74	5,68	6,2	6,8	7,26 +6,3%	6,72 -7,5%	6,9 +3,3%
Transport volume 1,000 t			50,7	49,5	50,7	55	58,7 +6,7%	56,2 -4,26%	56,8 +1,1%

## Germany

65. The data in the table below was received from the Government of Germany and represents the volume of goods handled in German inland navigation ports in 2001.

Total volume of goods handled in inland navigation ports, including:	269.0 M t
Greater River Rhine area	175.3 M t
West German navigational canals area	32.0 M t
Greater River Elbe area	21.1 M t
Mittelland Canal area	14.0 M t
Greater River Weser area	12.2 M t
Greater Berlin area	4.1 M t
Greater River Danube area	6.4 M t
Brandenburg area and land-locked area of Mecklenburg-Western Pomerania	3.9 M t

66. According to the Federal Statistical Office of Germany, the dynamics of transport of goods by German inland waterway during recent years were as follows:

1999	228.9 million t (-3.1%) and 62.7 billion t-km (-2.6%);
2000	242.2 million t (+5.8%) and 66.5 billion t-km (+6.1%);
2001	236.5 million t (-2.4%) and 64.8 billion t-km (-2.5%);
2002 <sup>15/</sup>	232.7 million t (-1.4%) and 64.5 billion t-km (-0.5%).

67. The share of traffic carried by German enterprises diminished during the last decade from 44.2% to 35.2% (Rhine traffic excluded). At the same time the share of traffic carried by Dutch inland navigation operators grew during 1991-2001 from 42.2% to 49.8%. <sup>16/</sup>

68. The traffic on the Main-Danube Canal has been increasing since the opening of the Canal in 1992 and in 2002 amounted to a record 6.222 million t at the Kelheim lock (the outlet of the Canal to the Danube) and to 7.175 million t at the Viereth lock (the northern entry point of the Canal). The traffic at the Kelheim lock may be considered as genuine West-East traffic and it is very encouraging to note that the volume of this Rhine-Danube traffic grew further in 2002 by 8.1% in comparison with 2001. The share of the Canal traffic carried by vessels of different

<sup>15/</sup> Navigation, ports et industries, 15 April 2003.

<sup>16/</sup> Navigation, ports et industries, 30 May 2002.

nationalities was in 2002 as follows: Germany - 51.5%, Netherlands - 31.2%, Belgium - 6.0%, Austria - 5.7%, Hungary - 2.2%, Slovakia - 2.1%, Luxembourg - 1.0% and France – 0.1%. <sup>17/</sup>

### **Hungary**

69. The volume of goods carried on Hungarian inland waterways in 2002 amounted to 3,006 thousand t (1,461 - national traffic and 1,545 - international traffic) which represented a growth of 3.5% in comparison with the traffic volume reached in 2001 (2,903 thousand t. of which 1,248 - national traffic and 1,655 - international traffic).

### **Italy**

70. Latest available data for freight transport by inland waterway in Italy show a modest growth in volume of goods carried (+0.1%, from 1,355 thousand t in 1999 to 1,368 thousand t in 2000) and some decrease in transport performance (-2.0%, from 172,341 thousand t-km in 1999 to 168,806 thousand t-km in 2000). Nevertheless, good progress was made by the industry during decade 1990-2000, both in transport volume and performance (+84.9% and +43.0%, respectively). <sup>18/</sup>

### **Lithuania**

71. The volume of cargo carried on Lithuanian inland waterways in 2002 declined to 515 thousand t (-40%) in comparison with the volume carried in 2000 (852 thousand t). Passenger traffic, however, has grown since 2000 by 127% and reached 2,890.2 thousand passengers.

### **Netherlands**

72. Data for domestic and cross-border freight transport by inland waterway in the Netherlands are only available for 1999 and 2000 when 312.4 and 315.1 million t (+0.86%) were carried, respectively.

### **Poland**

73. The volume of transport by inland waterway in Poland has fallen continuously in recent years. Thus, in 1995 it stood at 9.3 million t, in 2001 at 6.3 million t and in 2002 at 4.8 million t. Unfortunately, this negative tendency prevailed also in the first quarter of 2003 (-3.1%). <sup>19/</sup>

### **Portugal**

74. The volume of transport of goods on Portuguese inland waterways fell dramatically from 100 million t in 2000 to 50 million t (-50%) in 2001. The main reason was the insufficient depth of the channel on the River Douro making navigation to its mouth at the Atlantic Ocean

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<sup>17/</sup> Navigation, ports et industries, 15 April 2003.

<sup>18/</sup> Conto Nazionale dei Transporti, Anno 2000.

<sup>19/</sup> Central Statistical Office of Poland.

particularly difficult. The long-awaited construction of two piers at the mouth of the river to improve navigational conditions has been postponed for years due to the lack of funding. <sup>20/</sup>

### Romania

75. The dynamics of transport by inland waterway in Romania is reflected in the table below.

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Volume Million t	12.0	8.2	6.2	7.1	9.4	14.4	14.1	16.0	14.9	14.0	13.1	11.3
Performance Million t-km	2,090	2,030	1,890	1,592	1,896	3,107	3,774	4,326	4,203	2,802	2,634	2,746

### Russian Federation

76. The volume of goods transport by inland waterway declined in 2002 on European inland waterways by 7.5 million t (-5.7%) compared to the level achieved in 2001. The performance of goods transport followed this decline from 82,992 million t-km to 81,200 million t-km (-2%). This downturn was mainly due to a decrease in demand for construction material of 14.0 million t. At the same time, the volume of traffic of oil and oil products, cement, sulphur, iron ore rose in 2002. The volume of import/export goods rose particularly in the ports of the lower Volga, the Azov Sea and Don area and the port of Ejsk. In total, the tonnage of foreign trade goods moved by sea-river vessels amounted in 2002 to 29.3 million t (25.4 million t in 2001), including 14.5 million t of oil and oil products, 3.7 million t of cereals, 2.4 million t of metals and 2.9 million t of fertilizers. It is expected that in 2003, some 130.0 million t of goods will be carried by European inland waterways of the Russian Federation.

### Serbia and Montenegro

77. In 2001, 3,336 million t of goods were carried by inland waterway which was 0.176 million t less than in 2000 (-4.8%). Inland waterway transport performance also decline in 2001 amounting to 913 million t-km (-3.5%).

### Slovakia

78. After a period of stagnation due to limitations on navigation via the territory of the former Yugoslavia, the volume of goods traffic on the Danube started to recover from 1,371 thousand t in 1998 to 1,551 thousand t in 2001. The volume of goods turnover in the ports of Bratislava and Komarno amounted in 2002 to 2,940 thousand t exceeding the volume of 2001 by 4%.

### Sweden

79. The yearly volume of goods traffic via the Trollhätte Canal to ports located in Lake Vänern amounts to some 2.9 million t a year of which 0.6 million t represent domestic traffic. The main products carried are agriculture - 15%, forestry products - 30% and mineral oil products

<sup>20/</sup> Journal pour le transport international, March/April 2003.

- 20%. The yearly volume of goods passing the Södertälje Canal to ports in Lake Mälaren amounts to some 3.3 million t a year, of which 0.9 million t represent domestic traffic. The main products carried are mineral oil products - 15%, stone, gravel and sand - 15% and containerised general cargo - 8%.

### **Switzerland**

80. The volume of goods handled in the Rhine Ports of Basel declined in 2002 by 4.4% from 2001 and reached 8,255 thousand t: loaded 852,7 thousand t and unloaded 7,401 thousand t. Traffic of containers increased by 5.4% and amounted in 2002 to 72,431 TEU.

### **Ukraine**

81. The year 2000 seemed to be a turning point in the downward tendency experienced in inland navigation of Ukraine since 1989 when a record volume of 82.8 million t was reached. For the first time since 1989, the volume of goods carried in 2000 grew by 14.1% over 1999 and reached 9,129 million t. Unfortunately, the downturn tendency continued and in 2002 only 6.23 million t of goods were carried by national operators.

## **III. GENERAL INLAND WATER TRANSPORT POLICY ISSUES**

### **European Union (EU)**

82. A High-Level Group chaired by European Commissioner Karel Van Miert has proposed a new approach to implementing the trans-European transport network. Regretting serious under-investment and inadequate Community financial support which has led to substantial delays in many of the 14 major projects identified over ten years ago in Essen, the Group is recommending to Vice-President Loyola de Palacio a change of approach to enable the new priority projects it has selected to be carried out. The Group's approach, which takes account of the revision of the Guidelines for the trans-European transport network until 2020, is based on coordinating the investment needed by means of appropriate structures and, as part of the preparation of the EU's financial perspectives, bringing the Community's financial instruments into line. This initiative fulfils the requirements of adaptation and competitiveness of the EU through an ambitious policy of infrastructure development.

83. The Group examined over 100 projects put forward by the various States. After reviewing their technical and economic aspects, it assessed how they fit in with the European transport policy proposed in the White Paper, their European added value and the realistic nature of their timetable and funding prospects. On this basis, the Group agreed on 22 new priority projects, including "motorways of the sea", in addition to five "Essen" projects still to be completed. Eighteen of the new priority projects will start before 2010. The Group also proposed a number of projects to improve network management.



84. Among the above-mentioned 22 projects, there are two priority projects concerning inland waterways:

- (i) Eliminating bottlenecks on the Rhine-Main-Danube
  - Rhine-Meuse with the Lock of Lanaye as a cross-border section;
  - Vilshofen-Straubing;
  - Wien-Bratislava cross-border section;
  - Palkovicovo-Mohacs;
  - Bottlenecks in Romania, Bulgaria.
- (ii) Inland waterway Seine-Schelde

85. Unfortunately, with regard to this latter project, the Group was not able to obtain from all countries concerned a commitment that construction would begin before 2010. The Group believes however that this project will allow substantial improvement of the connections between the three large waterway basins in France, Belgium and the Netherlands. <sup>21/</sup>

#### **Central Commission for the Navigation of the Rhine (CCNR)**

86. On 3 March 2003, the European Commission and the Central Commission for the Navigation of the Rhine (CCNR) signed an Agreement on Cooperation between the CCNR and the European Commission.

87. On 27 November 2002 in Strasbourg, an Additional Protocol No. 7 to the Revised Convention on the Navigation on the Rhine was signed by CCNR member Governments. The text of the Protocol appears in document TRANS/SC.3/2003/11/Add.1. Upon its entry into force, the Protocol will allow the recognition on the Rhine of ship's certificates and boatmasters' licences issued by third countries, provided that such certificates and licences have been issued on the basis of regulations equivalent to those of CCNR and in accordance with procedures ensuring their effective implementation.

#### **Danube Commission (DC)**

88. Preparation for the revision of the Belgrade Convention on the Regime of Navigation on the Danube of 1948 has been launched. In accordance with the decision of the Preparatory Committee (Budapest, 16-17 April 2003), the first session of the Working Group of the Whole took place in Vienna on 3 and 4 July 2003. It was agreed that the Working Group on Navigational Issues would meet in Bucharest in November 2003.

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<sup>21/</sup> European Commission press release (IP/03/914), 30 June 2003.