ebu

european barge union

Annual Report 06/07

TIME TO SHIFT

ANNUAL REPORT

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5 YEARS OF EBU

The European Barge Union EBU has recently celebrated its 5th anniversary. In December 2001 EBU was founded as a European association in which the national organizations of barge owners and operators are represented. Since then EBU has actively contributed to the development of the European transport policy and more specifically to the introduction of a European inland navigation policy.

In the year of our foundation the European Commission launched its White Paper on European Transport Policy, announcing a new policy regarding the transport of freights in Europe. In January 2006 the Commission introduced its first communication on the promotion of inland navigation and proposed an action plan, called 'NAIADES".
Meanwhile the European Commission came up with a Mid-term review of its White Paper on European transport policies in order to examine its initial objectives. It concluded that its originally intended modal shift approach did not show the expected results and therefore introduced a change of paradigm. Co-modality was born with a new focus on making best use of all modes of transport and mainly the environmentally friendly alternatives to road transport.

Five years after its foundation EBU celebrated its first lustrum with the slogan **"Time to shift" -CHALLENGES FOR INLAND NAVIGATION". Why?**

Over the past years, EBU has worked on creating awareness of the potential of inland waterway transport. The transport sector in general occupies an important position within the European Union, but when it comes to getting freight off road and onto water – despite all new policies – inland waterways still handle too little of the total amount of freight transported in Europe.

- Although inland navigation in Europe carries more than 500 million tons a year and realizes an annual transport performance of some 130 billion tons kilometers the potential of this mode of transport is still often underestimated.
- Since the introduction of the White Paper the modal split of inland waterway transport in the EU-25 has even increased[1].
- According to the forecasts freight transport in Europe will grow by some 50 % until 2020, the share of inland waterway transport in absolute terms is estimated at 28 %. The estimated modal split in 2020 however will remain the same as in 2010.

The recent initiative by the European Commission to promote inland waterway transport is intended to stimulate its general transport policy. In the EU 27, inland navigation can play a far more important role. The intended action programme of NAIADES covers a wide range of measures, for which the Commission itself, the Member States, the River Commissions and the industry should undertake concrete and if necessary concerted efforts. This coherent approach aims to contribute to a development of inland waterway transport which itself contributes to a sustainable development of the European Transport policy.
Both the European Parliament and the Council of Ministers of Transport called upon the European Commission to come up with concrete actions within this concept. In the past year EBU therefore has worked together with the European Commission on further elaboration of this action plan.

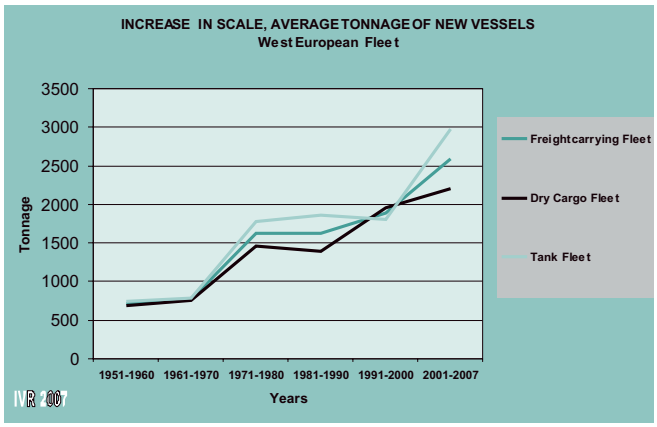
[1] *EU Energy and Transport in figures, Statistical pocketbook 2006*

BUILDING ON OUR STRENGTHS

SCALE

The natural advantages offered by inland waterway transport are tremendous.

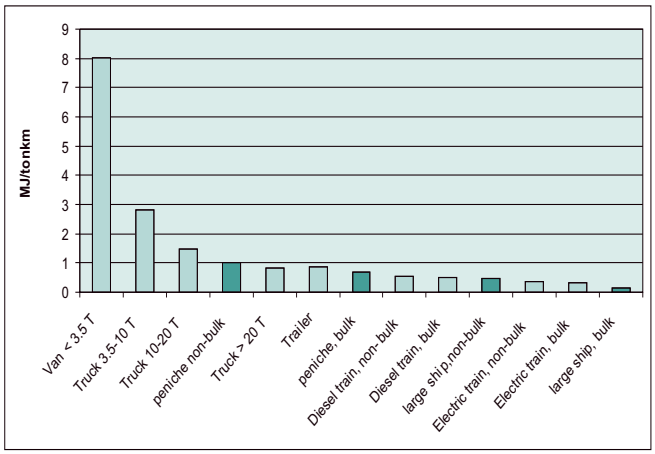
Thanks to its **scale**, inland waterway transport is the cheapest and most efficient way of moving products in bulk and in containers. An average container vessel carries some 200 containers; the new type of container vessels carries more than 500 containers and replaces 500 lorries. The average tank vessel meanwhile replaces 380 lorries. Over the past years there has been a considerable increase in scale of the inland fleet which leads to an increasingly effective modal shift.



ENERGY

By making **efficient use of energy**, inland waterway transport reduces the emission of pollutants into the atmosphere. Energy efficiency goes hand in hand with environmental protection. The future scarcity of energy and the development of sustainable mobility ask for environmentally friendly solutions. According to recent publications[2] the share of inland navigation in the total energy consumption is 0.5 %. Inland navigation is an environmentally sound mode of transport. EBU and its members are committed to protecting the environment and tightening standards for the operation and construction of vessels.

[2] *midterm review of the White Paper*



Energy consumption per ton/km "To shift or not to shift", CE Delft, 2003

SAFETY

Due to highly advanced and internationally recognized **safety standards**, inland waterway transport is by far the most safe and secure mode of transporting dangerous goods.

At present these regulations for the transportation of dangerous goods on inland waterways are laid down in the ADNR (Accord européen relatif au transport international des marchandises Dangereuses par voie de Navigation sur le Rhin). The ADNR was developed and is guarded by the Central Commission for Navigation on the Rhine (CCNR).

This situation will probably last until the end of the year 2010. At that time the ADNR will be replaced by the ADN (Accord européen relatif au transport international des marchandises Dangereuses par voie de Navigation), guarded by the United Nations-Economic Commission for Europe (UN-ECE) in Geneva. The ADN will be set into force according to a framework directive of the EU after at least seven of the states have finished the ratification process of the ADN.

The difference between ADNR and ADN is not only "R". The CCR has created structures and procedures to improve the regulations wherever demanded by the state of the art and allowed by technical progress. Thus the CCNR managed to create a high-level safety-standard for the transportation of dangerous goods on

inland waterways - the ADNR has created the highest safety-standard in the world.
UNECE already has experience with the transportation of dangerous goods on roads (ADR) and on rails (RID). There is no doubt that the UNECE will also provide a platform to discuss and decide on developments of the regulations for the transportation of dangerous goods in the sector of Inland Waterway transport. However, it has to be guaranteed that there are no significant material differences between ADN and the ADNR. Furthermore it has to be checked that the process of dissolving the ADNR out of the entity of the CCNR regulations will not lead to any unexpected gaps. EBU is aware to take part in this work to contribute to the preservation and improvement of the high-level safety and security standard on the Rhine under the ADN.
With its next and probably last edition - i.e. starting on 1 January 2009 - the ADNR will set into force the results of the long and difficult discussion on rules for the transportation of goods with water spoiling attributes. This last edition of the ADNR will indicate that for almost any liquid cargo a double hull vessel must be chosen. But such a milestone – which covers almost 80 % of the whole tanker market – cannot be reached from one day to the next.
Considering economical and political aspects this aim could approximately technically be reached in a period of 12 years – i.e. 2018. The whole transition processes will be divided - according to a proposal of the EBU – in three parts (until 2012, 2015 and 2018) each for a specific group of goods. These proposals of the inland waterway sector are expected to be accepted by the CCNR.

EBU experts are participating in another CCNR project, the improvement of the ship/shore interface. Following the standard of the ISGOTT (International Safety Guide for Tankers and Terminals) an ISGINTT (International Safety Guide for Inland Navigation Tankers and Terminals) will be developed. In 2008 the ISGINTT will be ready to point out the best practical examples for improving safety during loading and unloading activities of tankers as a common process in landside and shipside responsibility.

In order to maintain and to improve the safety standard EBU has released a new proposal to the Central Commission for the Navigation on the Rhine for the change from single hull to double hull vessels.
In 2005 the CCNR has decided that new criteria for potentially water polluting liquid cargo, transported by inland tanker barges, were unavoidable. In effect those new criteria should lead to – and were meant to – exclude single hull ships from the transport of dangerous and potentially water polluting cargo. The only possibility left when the new criteria are incorporated in legislation is transport with double hull ships. This legislation should come into force in 2009.
EBU has sought for a solution the different stakeholders in inland tank barging as well politics and public opinion and the government could live with. Trying to cope with the new developments EBU undertook the effort to consider the interests of single ship owners, the possibilities and capacities of shipbuilders, which were approximately 50 new ships a year, the financial means of the potential principal of the newly built ship, the customers, clients and the views of all stakeholders.
EBU succeeded in reaching a conclusive decision about the possible path of conversion regarding the proposed legislation being as from 31 December 2012 water polluting cargo, as from 31 December 2015 gasoline and similar products, as from 31 December 2018 gas oil and similar products, should be transported in double hull ships.
This advice however is accompanied with several assumptions, which have to be fulfilled.

KEEPING EUROPE MOVING

Development and growth of economy consequently result in an increase of transport. To cope with this, an integrated approach of economics and transport is needed. The objective of the new European transport policy is to realize sustainable mobility. Within this new context innovative solutions are needed taking into account both best practices of the various modes as well as new logistic concepts.

INTERMODALITY AND LOGISTICS

EBU welcomes the Commission's initiative to promote freight logistics in Europe as a key to sustainable mobility. As pointed out in the mid-term review of the 2001 White Paper, transport and freight logistics play a key role when referring to future developments of society, recognizing that the effect of imbalance between modes lead to situations which are not favourable by the Community. While Europe suffers from severe congestion problems solutions have been defined and partly implemented in order to find a new balance between transport volume and sustainable development of the society towards the background of an enlarged European Union.
Logistics as such however cannot be considered as a goal but as a means to better integrate the different modes of transport within the whole transport chain. Within this concept inland navigation can pay a major contribution to realize the goal.

Choices of transport modes are often based on traditional patterns. To make full use of accessible capacities, the alternatives to the traditional transport systems need support mainly in terms of information, education and training. The improvement of awareness in this field is an important starting point. Operators and barge owners can par excellence offer logistic solutions, integrating the waterway transport in the intermodal transport chain. Recent studies have shown that new cargo flows can be encouraged to shift to inland waterway transport[3]. Although innovative projects within the logistic chain may have a long lead time, they can lead to substantial cost reductions.

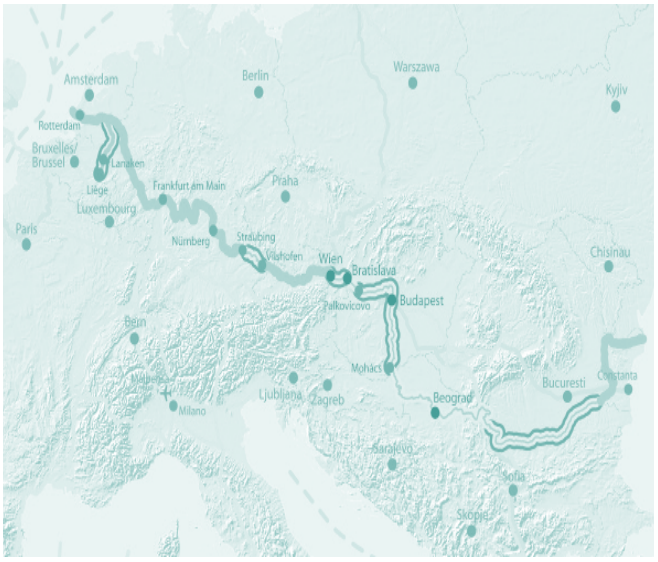
INFRASTRUCTURE

The quality of infrastructure is a key to logistics in freight transport. Optimization of the current infrastructure depends on the proper maintenance of infrastructure as well as the removal of the major bottlenecks and the realization of the missing links. One of EBU's main concerns is the improvement and proper maintenance of existing infrastructure and removal of bottlenecks which enables an optimal use of existing capacities.

Economically important areas are situated around ports and along rivers. Their interconnectability depends on the infrastructure. Bearing in mind that the trans-European transport network is a key element in the relaunched Lisbon Strategy, the European Union identified a series of transnational axes and projects, amongst which two related to inland waterways, the Rhine/Meuse-Main-Danube inland waterway axis and the Inland waterway Seine-Scheldt.

[2] *CREATING NEWS January 2007: periodical newsletter of CREATING, a European project which aims at stimulating waterborne transport within logistic chains, paying attention to both economical, environmental and safety aspects.*

Rhine/Meuse–Main–Danube



One of the major bottlenecks on this axe, the so called Straubing Vilshofen section, causes severe obstacles to transport efficiency. Due to insufficient depth of the waterway in this section, inland navigation lost some 4,5 mio t in the past five years, which is a loss of 15.7% of freight passing this section. The loss of income as a result of this situation amounts some 60 mio EUR in the past years. Additionally some 20 mio EUR had to be paid for the carriage of these goods to alternative solutions.

Inland waterway Seine-Scheldt

This project for example would connect 6 big Western European seaports to the hinterland in France and Belgium and would realize a unique transport system in this area.

Both projects – together with numerous other infrastructure projects all over Europe which are not on the priority list - are extremely important to the development of inland waterway transport and the ability to shift cargo from road to water.

Therefore EBU called upon Vice-President and Commissioner BARROT to appoint a coordinator for these inland waterway projects to overcome the initial problems and to start the removal of the bottlenecks and the realization of the missing links without delay. EBU welcomes Mr. BARROT's announcement to appoint a coordinator and is ready to support the coordinator with its experience and know how.

ENERGY EFFICIENCY AND ENVIRONMENT PROTECTION

Inland navigation has to protect its reputation as an environmentally sound mode of transport. Emission standards, fuel quality, noise protection and treatment of ship waste have always been a major concern of EBU. Currently, new methods to further reduce emissions even in the next decade are being discussed by ship operators, engine producers and authorities.

Inland shipping holds a positive record regarding environmental performance compared to other modes of transport and aims to keep this position. The inland navigation industry is committed to move forward on emission-low concepts in order to maintain its environmentally friendly image.

Emissions

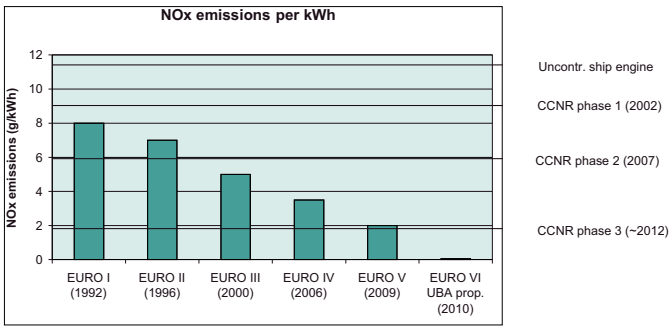
The European Commission recently launched the proposal for a Directive amending a.o. the existing Council Directive as regards the specification of fuel used by inland waterway vessels. The existing emission limits for inland vessels are based on marine engines and therefore are felt to be less stringent for inland engines.

EBU therefore in general welcomes the recent initiative of the European Commission to reduce the maximum sulphur content in non-road gas-oil. EBU however is arguing against a two step approach as proposed by the Commission. In the Round Table organized by the Central Commission for the Navigation on the Rhine

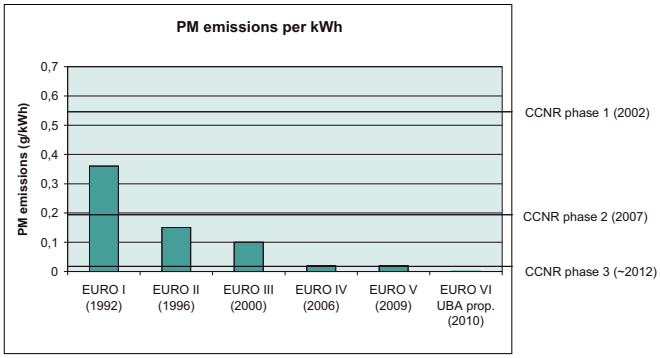
CCNR EBU called for a European-wide reduction in the sulphur content of inland shipping fuel to 10 ppm in one single step and quality requirements in line with EN 590 applicable in road transport in order to protect the environment and to ensure that inland waterway transport remains the leading mode of transport in ecological terms, given

- the availability of fuel according to this standard all over Europe
- the compatibility of older engines with new fuel parameters and
- a feasible solution for biogene blendings of fuel.

These aspects are under investigation for which studies are carried out. Within CREATING, a European project which aims at stimulating waterborne transport within the logistic chain, extensive research has been done into this topic and demonstration projects are envisaged in 2007 to prove the effectiveness of various measures.



CREATING News October 2006: Maximum NOx emissions according EURO (truck) and CCNR (ship) standards



CREATING News October 2006: Maximum PM emissions according EURO (truck) and CCNR (ship) standards

Water Framework Directive

EBU plays an active role in supporting EU-Member States and Commission to develop a common implementation strategy for the WFD. This work is carried out in close cooperation with other organizations of the maritime sector such as ESPO, EFIP, INE and PIANC. A structured dialogue with Commissions for the protection of certain river basins such as the Rhine and the Danube has been established.

NAIADES

The European Union aims to develop an integrated transport policy in order to promote the movement of goods and persons quickly, efficiently and cheaply. This is central towards the background of EU's goal of a dynamic and competitive economy as referred to in the Lisbon Strategy.

The transport sector occupies an important position in the EU, generating 7 per cent of total employment, 40 per cent of investment and 30 per cent of energy consumption. Alternative and environmentally safe modes of transport have to be encouraged and better integrated into the traditional transport systems, which brings about a sustainable balance in the transport sector that would be better for the economy and environment in Europe.

Within the enlarged European Union, inland waterway transport plays a more important role in the internal market. Many of the new Member States have navigable waterways which are used for freight transport.

It is for this reason that the European Commission understood the need to promote inland waterway transport by setting out an integrated action programme, focusing on concrete actions which are needed to fully exploit the market potential of this mode of transport and to make it more attractive to the users.

EBU welcomes the Commission's initiative and in the past year has intensively worked on the definition of concrete measures to be supported and promoted under the action programme.

1. MARKETS
2. FLEETS
3. JOBS AND SKILLS
4. IMAGE
5. INFRASTRUCTURE

Together with the European Commission EBU is working on the implementation of the programme. Both the Member States and the European Parliament will play an important role within this process.

Conclusion

It is necessary to strengthen the position of IWT by formulating a European inland navigation policy. The creation of a level playing field, the removal of the existing infrastructural and institutional bottlenecks and the necessary political support are a precondition for the future development of this mode of transport.

The proposed integrated action programme can be considered as a solid basis for the further development of inland waterway transport. The measures as proposed under the programme need to be implemented without delay in order to use the full potential of this sector.

THE ASSOCIATION

EUROPEAN BARGE UNION (EBU) is the European association of barge owners and barge operators. Since her establishment in 2001 EBU has represented the interests of her members. Main objective is to defend the interests of inland shipping at the European and international level. She deals with all the subjects that promote the development of the trade of inland shipping and of the transport by inland navigation vessels.

This includes *inter alia* the following tasks:

- following and contributing to the development of a sustainable European transport policy;
- controlling and promoting all measures intended to reach, through international cooperation, improvement of the productive capacity and cost-effectiveness of inland shipping;
- cooperating with all authorities
  - which take decisions about the general conditions under which inland shipping carries out her activities,
  - which are charged with the maintenance, extension and financing of the waterways and which are responsible for traffic safety;
- supporting an extensive exchange of information and experience and a fruitful cooperation between the members.

Members of the European Barge Union EBU

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Secretary
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EBU - UENF
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