

New white paper and future mobility:

Sailing the new course



European Barge Union (EBU) is the European association of barge owners and barge operators. Established in 2001, EBU meanwhile represents the interests of barge owners and barge operators in eight European countries.

EBU's main objective is to represent the interests of inland shipping at a European and international level and to contribute to the development of a European inland navigation policy. EBU thus promotes the development of inland shipping and of the transport by inland navigation vessels.

Sailing the new course!

The release of a new White Paper, the works on the Revision of the TEN-T, the Danube Strategy and an expected renewal of NAIADES are in a nutshell the milestones of the actual political framework. They aim to cope with the challenges of future mobility in Europe where inland navigation plays a vital role.

As newly elected president I will have to deal with a number of challenges. The main focus remains with the economic recovery of the industry, where in the past years it has been suffering from the consequences of the economic crisis which was of an unprecedented intensity. We are aware that it will take another couple of years before the industry will fully recover. On top of this difficult situation our members had to face the consequences of a severe accident on the river Rhine which led to a 23 days blockade of the navigation.

Recently many newly built vessels came on the market as an answer to the increased transport demands. This led to a renewal of the fleet in order to meet with ecological demands of a sustainable European transport policy. During the economic crisis this however led to a serious overcapacity of vessels. Finding sustainable solutions for this problem remains a major challenge.

At the same time I am confident that inland navigation with its benefits will deliver a major contribution to the realisation of the ambitious goals of the new European Transport Policy. Therefore I will continue to support all efforts to implement this transport policy which aims to focus on cleaner modes of transport and less congested infrastructures such as waterways.

EBU in the past period has contributed to the Commission's consultations to set a new course as regards the future mobility and the new TEN-T policy and I am happy to see the preparation work of a new EU framework for inland waterway transport confirmed. With our recently - together with INE and ESO - published vision **document "Setting the course"**, concrete recommendations as regards the transport challenges and future solutions have been released to the policy makers.

Finally, my personal keyword governing my two years presidency is "Cooperation"! Only if all of us - national and international organizations, international institutions and all parties involved - join forces, we will succeed in getting the best conditions the future inland navigation deserves!

The release of the actual Annual Report, which follows the release of the new White Paper, is to be seen as the starting shot to **sail the new course!**

André Auderset
President



Breakthrough in Social Dialogue and Rhine Boatmen Treaty

Working time negotiations

Recently the negotiating parties involved in the sectoral Social Dialogue Committee in inland navigation achieved a sectoral agreement regarding the organisation of working time. They have also succeeded in formulating adequate provisions with regard to seasonal work in the passenger transport industry, a major step forward! While the draft text for the working time agreement is currently under juridical examination it is expected to be adopted shortly.

Rhine boatmen treaty / Regulation 883/2004

On December 23rd 2010 the EU member States participating in CASS reached an agreement based on Article 16 of the regulation. This Agreement determines the applicable social security law on the basis of the residence of the operator of a ship and will continue to apply in the Rhine Riparian States which is crucial to barge owners and operators in terms of legal security.

Manning requirements and recognition of boatmasters' licenses

After the breakthrough in the above mentioned areas the harmonisation of manning requirements is tabled as the next priority of the social partners at European level.

With regard to the constantly growing need for qualified personnel, mobility of crewmembers and boatmasters throughout Europe has been improved by the recognition of boatmasters' licenses and service books for crewmembers from several EU member States by the Central Commission for Navigation on the Rhine.

Harmonisation of professional qualifications

Beyond our effort for more flexibility of personnel based on practical experience, EBU is actively supporting the development of **Standards for Training and Certification in Inland Navigation (STCIN)**. This concept would allow for international standards in professional qualifications and aims at establishing quality standards in training.

Following the professional competencies that were specified at operational and management level EDINNA is now elaborating them and submitting its proposals to the Joint Working Group. A result is to be expected towards the end of the current year.



"The use of sulphur free fuel in Inland Waterway transport on EU Waterways as from 1st January 2011 has already contributed largely to a better environmental performance of the inland fleet."

Ongoing European harmonisation of IWT rules

Technical requirements of Inland Waterway vessels are currently reviewed in the field of accommodation on board, relings, wheelhouses and the protection of crew members from noise and vibration. EBU has called upon the CCNR and the European Commission for early and constant consultation in the ongoing discussion which - according to EBU - still needs an impact assessment and alignment with European rules.

In terms of future emission standards, the European Commission still has not tabled a proposal for even stricter emission standards which are likely to apply from 2016. In non-road mobile machineries, Inland Waterway vessels will possibly face emission limits that are similar to the US Environmental Protection

Agency's standards which would allow for a bigger market for specific engines. However, the use of sulphur free fuel in Inland Waterway transport on EU Waterways as from 1st January 2011 has already contributed largely to a better environmental performance of the inland fleet.

More harmonisation is not only needed for technical requirements on European rivers. Also an alignment of river basin based navigation rules and the Code Européen des Voies de la Navigation Intérieure (the French European Code for Inland Waterways - CEVNI) is an important work from the sector's perspective.



Safety above all

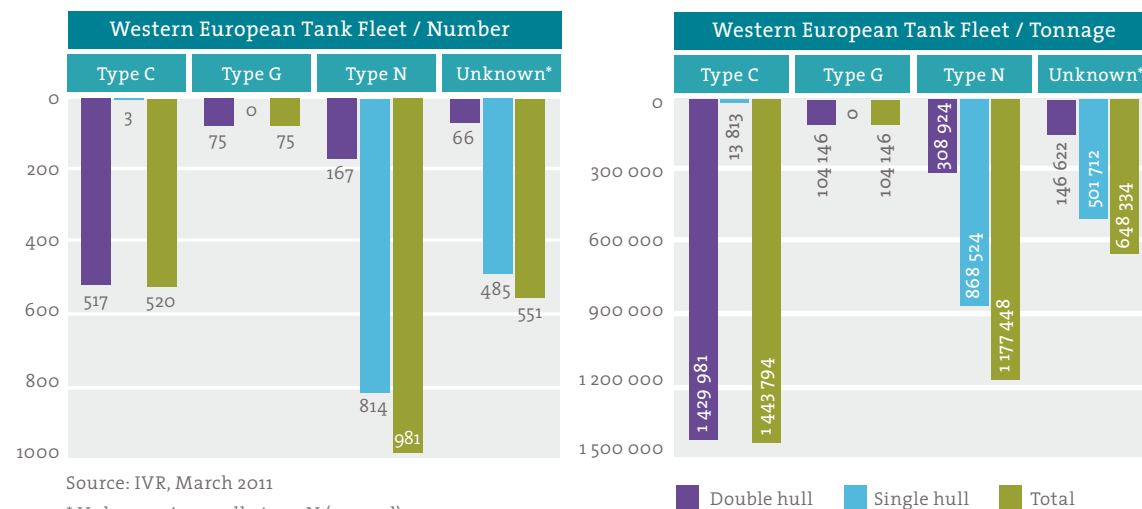
Inland waterway transport is known as the safest and securest mode of transporting dangerous goods due to highly advanced and internationally recognized standards. Reason why it is the supplier of the major petrochemical industries all over Europe. Meanwhile a majority of the tank vessels is equipped with double hull, guaranteeing protection of the environment in case of accidents like in the recent case. One of the highest profile changes in the inland waterways industry was the completion of a proposal to phase out the majority of single hull tankers in three steps starting as of 2013 and followed by a group in 2016 and 2019.

The inland waterways network in the European Union is made up of 29,500 km of canals, rivers and lakes, of which around 20,000 km is concentrated primarily in the zone with the busiest waterways; the Netherlands, France, Germany, Belgium and Austria. These waterways form part of a multimodal melting pot. Nowhere else in the world is the flow of goods more concentrated than on the Rhine. Where already today the majority of dangerous goods is transported on inland waterways it is expected to increase by between 15 and 40% in the coming years.

No concessions on safety and the environment – striving for total safety during the transport of hazardous goods on waterways.

The transport of hazardous materials is an important link in the manufacture of plastics, fertilizers, medicines and the distribution of fuels. In 2009, international legislation became effective stating that, in time, single hull tankers would no longer be permitted. The so-called phasing out will commence in 2013. Step by step, an increasing number of products will no longer be permitted to be transported in single hull tankers. As things stand now, only a very limited number of hazardous materials will be permitted to be transported in single hull tankers as from 2019.

Inland shipping has strongly anticipated this. The double hull tonnage that was required to replace the single-walled fleet in due time pretty much made its way to the market between 2005 and 2009. The inland shipping companies concerned made considerable investments to effect this.



Inland navigation sailing on new energy

Alternative fuels high on the agenda

Inland navigation is already the most energy efficient and low carbon form of transport (3 times less carbon per ton-kilometre in comparison to road). However different measures need to be taken in order to maintain this leading position in the field of sustainability. Therefore the sector is also actively working to make an even greater contribution to cutting down on global warming and reducing pollution.

Liquefied Natural Gas (LNG) is one of the alternative fuels that could have a promising future in the sector. In different countries various partners have joined forces and are currently working on a short term implementation which could result in the first LNG vessels being operational at the end of 2011. In order to be able to consider LNG as a serious option, a number of legal and practical obstacles will have to be overcome. To remove these barriers, governmental authorities are supporting local experimental initiatives to apply LNG as fuel for transport.

In return, experience gained in pilot projects will promote alignment in the field of LNG application. Although the support of several single projects turns out to be very practical, it does not cover legal issues. And, solving legal barriers is a prerequisite to justify investments in LNG supply infrastructure. The objective of an international project involving various partners from the IWT sector, engine manufacturers, port authorities, standardisation commissions, classification societies and oil companies is to develop a roadmap (with different options to consider) towards an optimal small scale LNG supply chain from a safety, commercial, technical and legal point of view based on the long term vision of relevant stakeholders. At the same time possible barriers for LNG in the international guidelines, governmental legislation and technology will be outlined. The environmental coordinator of the EBU monitors the relevant discussions to further clear the field of possible obstructions for this new possible fuel.

“Various reports of the United States Energy department show that in 35 year fossil fuels will be exhausted unless new oil fields are discovered. It is estimated that prices will increase significantly due to the scarcity of these fuels. Since inland vessels use engines with a life span ranging from 15 to 30 years it is time to seriously start thinking about alternative fuels from a Return of Investment point of view and at the same time reduce the emissions.”

Robert Tieman, environmental coordinator



Sailing the new course: passenger transport will sail along!



environment as mentioned above, the inland passenger sector proves itself to be a reliable partner in delivering a major contribution to the realisation of the ambitious goals of the new European transport policy of the new White Paper.

Rights of passengers

In the second half of 2010, the discussion on the “Regulation concerning the rights of passengers when travelling by sea and inland waterway” finally came to an end by the Regulation being adopted. The EBU-plead resulted in daytrip and sightseeing excursions, and smaller passenger transport services (no more than three crew members or less than 500 m one way distance), being excluded from the scope of this Regulation. The scope of the Regulation is therefore limited to hotel cruise services and (large) ferry services.

The Regulation will enter into force end of December 2012. In the meantime the sector will have to implement, in collaboration with the respective national governments, the necessary measures in an adequate way. This involves a.o. setting up proper and accessible complaint-handling mechanisms for rights and obligations covered by this Regulation, the training and education of personnel with regard to disabled passengers, and the installation of national enforcement bodies.

Waste treaty and environmental protection

One of the key issues in 2010 as regards the environmental protection was the waste treaty in general, and the grey water discharge in particular. Although the majority of ships are ready for the prohibition to discharge grey water over board, by having installed either grey water collection tanks or water treatment systems, an adequate infrastructure of shore installations for the collection and discharge of grey water is still lacking.

Sailing the new course? The passenger transport will sail along!

New White Paper on future mobility

Although the passenger transport segment was not hit as hard by the economic crisis as the freight transport, it was nevertheless affected and is now recovering from the effects of it. Especially the daytrip ships active in the market of professional charterers (unlike private charterers) were confronted by a considerable decrease in turnover.

Notwithstanding the economic dip, the potential of waterways for passenger transport is enormous. Passenger transport on the European inland waterways not only plays an important role in the wide range of touristic and leisure services with various sightseeing, day trip and river cruise ships, but also in respect to regional and urban mobility, with several ferry services providing swift, efficient and reliable mobility to numerous commuters.

Taking into consideration the enormous underutilised potential of waterways for passenger transport, and by complying with the latest regulations and legislation with regard to a.o. quality and

Policy objectives for sustainable transport

Ambitious targets call for ambitions measures

The aim of the European transport policy as highlighted in the recently released new White Paper of the European Commission is to establish a sustainable transport system that meets society’s economic, social and environmental needs. Growing transport and supporting mobility while reaching the -60 % emission target is an ambitious goal.

This implies the support of cleaner modes and more intelligent and efficient use of less congested infrastructure. The new policy calls for new approaches.

Therefore a **stimulation policy** is needed in favour of those modes that contribute most to the realisation of this policy. The waterways in Europe, which are mostly (existing) natural rivers, have a capacity to absorb a much higher volume of transports. In connection with the positive effects in terms of **safety, energy efficiency and external costs** a switch to inland navigation offers a triple advantage.

The EU transport patterns are at a turning point. The adequate policy framework will make or break the course towards a competitive and sustainable economy. Moving inland navigation higher on the

political agenda through establishing a **permanent inland navigation policy** by a successor of NAIADES with **adequate financial support** will be one of the main elements to realise the overall European policy goals. Besides, the outcome of the recent TEN-T revision and proper maintenance of the existing waterways will be crucial to the future development of inland waterway transport.

Inland navigation a major part of the core infrastructure-network

Infrastructure and the TEN-T policy in economic terms are crucial to the development of Europe. Stimulation of the competitive position of Europe in a sustainable way needs to take on board transport and infrastructure demands. Transport and cargo volumes follow the economic development and trade patterns. According to the recent White Paper transport volumes will increase by 80 % until 2050. This calls for a proper infrastructure to guarantee the smooth transport of cargo and passengers in the future with a special focus on

- **interconnectivity** of modes within the transport and logistic chain.
- making the best and most efficient use of the existing infrastructure.

Danube strategy

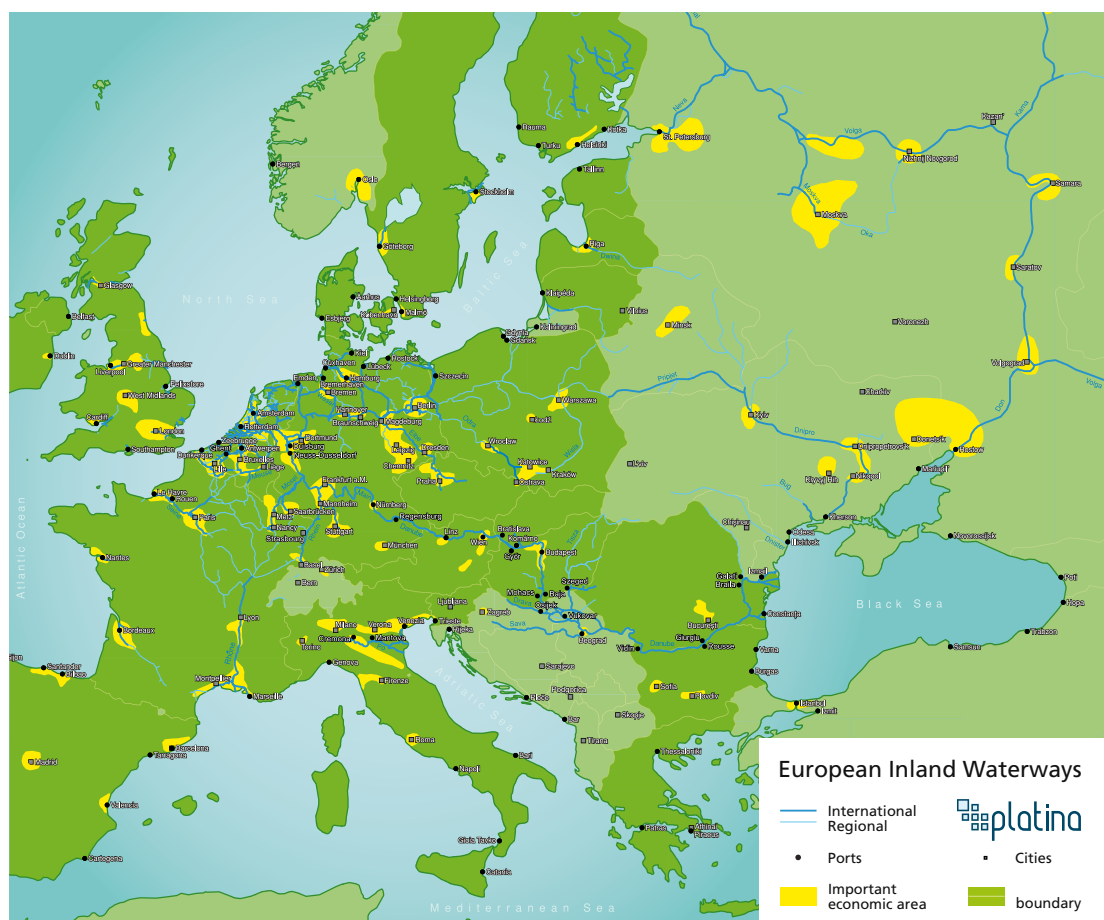
In order to develop the huge economic potential of the Danube river, the European Commission has end 2010 proposed an overarching Strategy for the Danube Region. This Strategy will focus on concrete priority action areas, such as the improvement of navigability, water quality, security cooperation and the opportunities for tourism.

EBU strongly welcomes and supports this strategy, which a.o. aims to increase the freight transport on the Danube by 20 % by 2020 compared to 2010. The Strategy therefore is focusing on reliably waterway conditions and a better integration of inland waterway transport into the overall transport system and the region. The Danube river basin has a huge potential for sustainable inland navigation.



Inland Waterways as major part of the core network are linking East and West, old and new Member States. To fully exploit the potential of the waterways - mainly existing and natural infrastructure - the necessary financial support must be increased to remove the bottlenecks and realise the missing links.

A review of the existing TEN-T policy must be based upon solid financial perspectives, criteria and support where at least 20 % of the TEN-T budget should be dedicated to the navigable waterway network.



Naiades follow up

The untapped potential in Inland Waterway Transport is recognised in the new White Paper. To make full use of the potential of Inland Waterway Transport an appropriate and supportive framework is required.

Having recognised the benefits of the existing NAIADES programme this calls for a permanent follow up. EBU welcomes the recognition of the benefits of inland navigation in the recent White Paper of the European Commission by ensuring the continuity of the implementing measures and addressing new challenges through a comprehensive approach.

In its second Mid-term progress report the European Commission concluded that NAIADES for the first time established a comprehensive European inland waterway transport policy framework and created a universally acknowledged momentum in the sector to raise it high on the political agenda of all stakeholders. Where on an operational level a wide range of valuable and tangible results has been delivered it is however widely acknowledged that the lack of dedicated resources turned out as disadvantage for the implementation of the programme. Therefore a follow up programme of NAIADES needs to be supported by sufficient financial means.

Taking into account the suitable framework for inland navigation that the European Commission is setting out in the White Paper this needs to be ensured by concrete actions and support such as outlined in the REGINA report:

- intensified cooperation between all stakeholders through the establishment of a permanent, structured and intensive cooperation between the competent institutions;
- a permanent European IWT policy by setting up a comprehensive European IWT strategy and programme as a permanent follow-up of the current Action Programme NAIADES;
- sufficient financial and human resources by providing the financial support of the Community level required to implement a permanent European IWT programme;
- a seamless transition of the ongoing NAIADES actions by securing continuity between the present and future actions.

So, let's sail the new course!

"It is widely acknowledged that the lack of dedicated resources turned out as disadvantage for the implementation of the programme. Therefore a follow up programme of NAIADES needs to be supported by sufficient financial means".
Mid-term progress report NAIADES.

The Association EBU members



Austria

**Berufsgruppe Schifffahrt /
Wirtschaftskammer Österreich**
Wiedner Hauptstr. 63
1040 Wien



The “Berufsgruppe Schifffahrt” is the legal representation of more than 450 members with a total fleet of some 100 vessels. It is located in Vienna and part of the Austrian Chamber of Commerce. The members represent all marketsegments of inland navigation.

Its aim is to keep and improve the market and competitive position of the Austrian inland navigation industry. Moreover it is aimed at integrating inland navigation into modern logistic chains and to accelerate the intermodal development of the Austrian ports.

Berufsgruppe Schifffahrt/Wirtschaftskammer Österreich is a founding member of the European Barge Union.



Belgium

Unie der Continentale Vaart v.z.w.
Kleindokkai 3-5
B-9000 Gent

UCV is an association of Shipowners (companies) and Freight Forwarders, in charge of the interests of the members in all matters of inland waterway transport, representing the members in Belgium and Europe at all levels.

UCV is also a representative association of employers recognized by the Belgian government. UCV is a founding member of the European Barge Union

**Algemeen Aktiecomité der Belgische
Binnenscheep-Vaartorganisaties**
Dokseinde 14
B-2930 Brasschaat

**Association de Maitres Bateliers des Regions
de Liege, Limbourg et Charleroi**
24, Quai de Coronmeuse
B-4000 Liege

A.M.B. was officially founded on 7 February 1927. It is an association recognized by the Belgian and Walloon authorities where it is duly represented in several committees, institutions and organizations. Its aim is the promotion, protection and defense of all navigational and professionals interests of its members.

The members are mostly single barge owners, registered mostly in the southern part of Belgium. Some are owners of more than one vessel.

A.M.B. is a founding member of the European Barge Union



Czech Republic

AVP-CZ Czech Barge Union
K. Capka 211/1
CZ-40591 Decin 1



The Czech River-Barge Union was established in 2003 and represents ca 95 % of the Czech river fleet. The mission of the Association is to establish the conditions for the development of inland navigation in the Czech Republic, to represent, formulate, support and promote justified and common interests of its members with the goal to support inland navigation.

On satisfying its mission the Association is particularly aiming at

- improving the economic position of its members
- promoting the propoper maintenance of the waterways as well as realising the missing links.



France

Comité des Armateurs Fluviaux (CAF)
8, rue Saint Florentin
D-75001 Paris



The Comité des Armateurs Fluviaux (CAF) is the professional representation of the French inland navigation enterprises as well as the sectors that are linked with the inland navigation industry. Today some eighty enterprises represent the industry in the following way:

- Nearly the total of the inland shipping companies, a consortium of single barge owners and some small fleets for the sector of industrial transport. These enterprises realize some 40 % of the inland traffic in ton-kilometers on the national waterways. They are also active internationally.
- Some forty enterprises of the Inland Waterway Tourism sector who offer tours and cruises with overnight stay to French and foreign passengers in all the regions of France on rivers or lakes with a great range of possibilities.

CAF is a founding member of the European Barge Union.



Germany

German Association of Inland Navigation (BDB)

Dammstrasse 15-17
D-47119 Duisburg



Bundesverband der Deutschen
Binnenschiffahrt e.V. (BDB)

The German Association of Inland Navigation, founded in 1974, is a national professional organisation representing the majority of the German inland navigation fleet. It was formed by the merger of regional associations. BDB is headquartered in Duisburg, a few steps from Europe's most important inland port. In addition, a permanent representation is located in Berlin which enables an active substantial exchange on national infrastructure and industrial policy with the ministries and other stakeholders. BDB's members come from all market segments of cargo and passenger shipping. BDB is the sole national organisation that represents both shipping companies and owner operators.

BDB's objective is to strengthen the competitive position of inland barge operators and to represent their interests. For this reason the association pursues activities on national and international level. It actively supports issues of the industry in various fields such as infrastructure, fiscal and legal policy or nautical and technical conditions of vessel operation.

BDB is a founding member of the European Barge Union.



Netherlands

Central Bureau for inland Barging (CBRB)

Vasteland 12 E
3011 BL Rotterdam



The Central Bureau for Inland Barging (CBRB) is an employers' organisation for companies operating on the river Rhine and other inland waterways. It represents the interests of its (400) members in national and international organisations and governments, and participates in the various consultation platforms in the world of business. The annual turnover of the members is about 1000 mio., which is about 2/3 of the total turnover of inland shipping sector in the Netherlands.

The Bureau takes an interest in the fields of transport policy, labour issues, legal matters, the environment and nautical affairs. Its members are drawn from inland transport enterprises from all market segments – from the tanker and dry-cargo industries to container and roll-on-roll-off transport, from towage and push-towing to passenger transportation.

CBRB is a founding member of the European Barge Union.



Switzerland

Schweizerische Vereinigung für Schifffahrt und Hafenwirtschaft (SVS)

Südquaistrasse 14
CH-4019 BASEL



The Swiss Association of inland navigation and ports (SVS) represents the interests of the inland navigation industry and its stakeholders towards authorities and other associations. The association is a member of various national and international organisations and holds the secretariat of the 'Inland Navigation' parliamentary group. By the end of 2009 SVS counts some 276 members in the categories individual members (138), companies (71), partners of the inland navigation (37) as well as authorities, associations and organisations (30). The SVS is directed by a Board consisting of ten members. The director is responsible for the daily business.

SVS is a founding member of the European Barge Union.



Romania

Romanian Association of Inland Ship Owners and Port Operators (AAOPFR)

+ St. Albatrosului 2,
RO-800029 GALATI



Founded in April 1993, the "Romanian Association of Inland Ship Owners and Port Operators" represents almost 90% of the Romanian inland navigation fleet capacity and 90% of the Romanian inland port operators.

Originally named "Romanian Association of Inland Ship Owners", the membership was extended to include port operators, shipping companies, brokers, insurance companies etc that are acting in the Romanian inland navigation field.

AAOPFR has its head office in Galati, the biggest inland port in Romania, hosting the largest inland navigation fleet. The members of the Board of Directors are usually elected in such a manner that a large area of Romanian inland navigation waterways and ports (Galati, Braila, Constanta, Drobeta-Turnu Severin etc) is covered.

The main objective of the association is to promote, nationally and internationally, the interest of our/ their members.

AAOPFR has been an observer member of EBU since 2007 and in 2008 applied for full membership.



Structure (as per april 2011)

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- Vice-President, L. Fojitu (CZ)
- Secretary General, T. Hacksteiner

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- Dipl. Ing. W. Mosser, Brandner Wasserbau ambH, Wallsee

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- W. Pierre De Grave Antverpia, Herstal (A.M.B.)
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- O. Parmentier (Alternate member), Aktiecomite - Comité d'Action, Antwerpen

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- J. Schwanen, Bundesverband der Deutschen Binnenschifffahrt e.V., Duisburg

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- J. Vogelaar, Centraal Bureau voor de Rijn- en Binnenvaart, Rotterdam

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- L. Cotiga, AAOPF, Galati

Switzerland

- A. Auderset (President), SVS, Basel
- B. Heydrich, Ultra-Brag AG, Basel

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- E. van den Poel, Merksem
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- S. Tlustos, Ceskeprístavy, Praha

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- J.M. Meyer, Compagnie Française de la Navigation Rhénane, Strasbourg

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- H. Rüffer, (DTG) MS "Otrate", Boffzen
- W. Schröder, Deutsche Binnenreederei AG, Berlin
- J. Zöllner, DST, Duisburg

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- J. Kruisinga (Vice-chair), CBOB, Rotterdam
- L. van Toorenburg, KSV, Rotterdam
- H.J. van der Velde, CBOB, Rotterdam

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- St. Fortrye, CFT, Le Havre Cedex

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- R. Versloot, Vof Commander, Zwijndrecht

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- R. van Westenbrugge, Schweiz. Ver. für Schifffahrt & Hafenwirtschaft, Basel

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- K.H. Meier, Reederei Jaegers GmbH, Duisburg

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- D. van Kempen, Chemgas B.V., Rotterdam
- R. Tieman, Centraal Bureau voor de Rijn-en Binnenvaart, Rotterdam

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- G. Baumgartner, Stetrag AG für Schiffsbefrachtung, Basel

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- W. Thie, Neckar Personenschiffahrt Berta Eppe GmbH & Co. KG, Stuttgart
- J. Rusche, Bundesverband der Deutschen Binnenschiffahrt e.V., Duisburg

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- W. B. de Zeeuw (chair), De Zeeuw Reederei Management, Basel

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- J.V. Schumacher, Dettmer Gruppe, Duisburg
- K. Wenkel, Bundesverband der Deutschen Binnenschiffahrt e.V., Duisburg

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- J.F. Dalaise, Comité des Armateurs Fluviaux, Paris

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- M. Koning (chair), Centraal Bureau voor de Rijn- en Binnenvaart, Rotterdam
- J. Naaborgh, Chemgas Shipping, Rotterdam

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- V. Stancu, AAOPF, Galati

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