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Report on the NAIADES dialogue meetings

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1 EXECUTIVE SUMMARY

The 5th work package of the PLATINA 2 project is aiming not only at the efficient management of the project activities and reporting towards the European Commission, but also at dissemination of the results towards a broad audience.

The web portal www.NAIADES.info was restructured and in course of the redesign, social media were integrated. Furthermore, PLATINA 2 opted for a more stakeholder-oriented strategy that would help communicate on PLATINA 2 to a broader circle. NAIADES dialogue events, so-called “NAIADES dialogue meetings” have been established as to bridge the gap often left in classical project communication between the end user and the higher and highest level policy makers and create an open dialogue between all stakeholders. At NAIADES dialogue meetings Stakeholders are invited to contribute their point of view as regards research and innovation topics and priorities as well as proper vehicles for implementation.

Such meetings have been held in the framework of the following IWT-related events:

- EDINNA General Assembly (Brussels, February 2014)
- Danube Business Talks (Vienna, 19 March 2014)
- Barge to Business (Luxemburg, 20 November 2014) and the
- CCNR Plenary Session (Strasburg, 4 December 2014).

One of the most important findings the NAIADES dialogue meetings have brought is that the benefits of such events are manifold; IWT promotion and umbrella-organizations see it as an opportunity to integrate NAIADES Dialogue in their IWT-related events, thus raising awareness and message-scope and the participative approach is facilitating acceptance and ownership for relevant PLATINA 2 results among a wider audience.

In other words, NAIADES dialogue meetings are bridging the gap between policy-makers and users, between the European Commission and external audience of potential end users, freight forwarders, authorities, fleet and terminal operators, potential shippers, different players from the ports sector.

The open dialogue that characterises this inclusive approach is welcoming feedback on intermediate steps and fostering guidance on next steps which obviously has a positive impact on the sector as a whole.

2 BACKGROUND

2.1 About this document

This document is about NAIADES Dialogues, a working area and a new communication mechanism of the PLATINA 2 project. It is a core element of the participatory approach of the inland navigation policy of the European Commission. It is “cross the borders” of the PLATINA 2 work packages since it offers a platform for exchange between high-level policy-makers and key actors as well as representatives of the sector.

Inland navigation has always been known as a sustainable mode of transport. However, because of the enormous progress the road sector is making, this advantage is eroding. If inland waterway transport wants to keep a place between road and rail as a viable alternative, new communication channels have to be found, and it needs to open to new means of communication that will help obtain more community support and enhance its good reputation beyond the sector. In this document first the methodology and mechanism behind the NAIADES Dialogue meetings will be addressed by summarising the events and their benefits for PLATINA 2.

Secondly, the lessons that can be learned from such meetings will be presented, the results of which will enhance further communication measures of this nature.

2.2 Introduction

Stakeholder engagement has been increasingly gaining importance in public policy decision-making and delivery. Being used as a means to improve communications, it allows projects to obtain wider support and buy-in, helps gather useful data and ideas, enhances a project’s reputation and really enhances the transparency of decision-making processes, making those more sustainable. Just like many other projects PLATINA 2 also needs to engage with a wide range of stakeholder groups, each with their own concerns, needs, conflicts of interest and levels of influence. For this purpose, understanding who stakeholder groups are, their issues and what motivates them is mandatory. Being a follow-up project of its predecessor PLATINA, PLATINA 2 has already identified stakeholder groups. The work that has started with PLATINA 2 is to make sure to keep the communication with the various stakeholder groups, open to help those serve as multipliers with rollover effect.

In the framework of the PLATINA 2 project, mass media channels are intensively used to inform the general audience on PLATINA 2 project results and further developments on European inland waterway transport. The NAIADES dialogue though, takes the initiative one step further with a personal and face-to-face approach by organising a series of NAIADES dialogue Meetings with key stakeholders.

Whereas the project’s dissemination activities primarily involve ‘internal’ IWT experts, the NAIADES dialogue explicitly aims at reaching out to an external audience of potential end users, freight forwarders, authorities, fleet and terminal operators, potential shippers, different players from the ports sector etc.

Through the organisation of such meetings for this ‘external’ audience on a regional and sometimes European level, PLATINA 2 has been purposefully focusing on a participative approach which can facilitate acceptance and ownership for relevant PLATINA 2 results among a wide audience. In this context, synergies with other workshops and seminars have been successfully sought.

As a general rule, NAIADES dialogue meetings cover a general part providing information and collecting input on the overall work of PLATINA 2 and then include a theme setting which depends on emerging developments and topical relevance, but will in any case be comprehensive, that is, cross the borders of the PLATINA 2 work packages and therefore will reflect selected subsets of results from different work packages of the project.

The NAIADES dialogue is thus assuring that the development of PLATINA 2 reaches not only operators and logistical decision-makers but also their representatives. The **following topics have been on the agenda of the NAIADES Dialogue Meetings presented in this outline:**

- Workshops on potential new markets for inland waterway transport (e.g. biomass, high and heavy products)
- Market take-up of innovations

- Harmonisation in the field of education and training and a closer look at the requirements of operators for the IWT personnel of the future
- Innovations in waterway maintenance including possible effects on the fairway parameters

NAIADES dialogue meetings focus on the regional or European scale and have a strategic mission. They address players directly from the field and their representatives and ensure an inclusive approach to the implementation of PLATINA 2 while keeping an open dissemination channel on NAIADES for the sector and beyond.

The NAIADES dialogue meetings are typically scheduled in combination other meetings/conferences as well as with meetings of national organisations related to inland navigation. Through this, a broad number of yet specific players being present can be exploited and information can be efficiently transmitted.

3 NAIADES DIALOGUE MEETINGS METHODOLOGY

3.1 What are NAIADES Dialogue Meetings

NAIADES Dialogue is a working area and a new communication mechanism of the PLATINA 2 project. It is a core element of the participatory approach of the inland navigation policy of the European Commission. It is “cross the borders” of the PLATINA 2 work packages because it offers a platform for exchange between high-level policy-makers and key actors as well as representatives of the sector. NAIADES Dialogue meetings focus on the support activities of the 7th Research Framework project PLATINA 2 to the implementation of NAIADES II.

NAIADES meetings present an opportunity to speak openly in a networking setting, thus enabling a direct exchange between key players on selected topics related to the latest developments in the field of inland navigation in Europe. This initiative focusses on specific topics and/or corridors. Usually with local – i.e. “Corridor” - focus the meetings also do go to pan-European level. In general, they reflect the nature of the PLATINA 2 project, namely to serve as an exchange, discussion and promotion platform with practical relevance. Such meetings focus on the support activities of the 7th Research Framework project PLATINA 2 to the implementation of NAIADES II.

A proper involvement as foreseen in NAIADES dialogue meetings includes the following benefits:

- “added value” and greater sustainability for the project’s agenda
- better co-ordinated stakeholder consultation
- establishment of a clear trail of engagement for the issues presented in PLATINA 2

3.2 What is their purpose?

NAIADES dialogue meetings explicitly aim at reaching out to an external audience of potential end users, freight forwarders, authorities, fleet and terminal operators, potential shippers, different players from the ports sector etc. Such meetings involve a broader audience and a larger group of stakeholders who bring background and context knowledge across and collect viewpoints of external stakeholders that turns into input for PLATINA 2 validation.

Through the organization of NAIADES dialogue meetings for an external audience on a regional and European level, PLATINA 2 focuses on a participative approach increasingly facilitating acceptance and ownership for relevant PLATINA 2 results among a wide audience and enabling the integration of feedback from practice in which requirements and feedback are integrated into policy design.

They are an opportunity to inform and to be informed about the PLATINA 2 project activities, to learn about the progress that has been made and to give input on the project’s activities. Such meetings bring fresh news from the market, provide an appropriate setting and atmosphere for a broad variety of participants to present topics and give their feedback on the project in a less formal yet effective setting. Such meetings clearly increase the involvement of stakeholders and the exchange of observations and recommendations from the outside.

Below is the approach NAIADES Dialogue has developed with its level of participation goals

NAIADES Dialogue level of participation goals	
Inform	In order to provide the sector with balanced and objective information to assist them in understanding the situation, alternatives, opportunities and/or solutions
Consult	In order to obtain public feedback for decision-makers on analysis, alternatives and/or decisions.
Involve	So that we can work directly with the our stakeholders and an interested public throughout the process to ensure that public concerns and aspirations are consistently understood and considered in decision making processes.

Collaborate	To partner with the stakeholders and include them in the development of alternatives and the identification of the new horizons for exploration.
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3.3 Who are the persons involved?

The NAIADES dialogue assures that the development of PLATINA 2 reaches the operators and logistic decision-makers and their representatives. It is both an opportunity for policy makers to communicate their strategies and policy instruments as well as a chance for practitioners to place their point of views and ideas. A great opportunity to be informed about the PLATINA 2 project activities, to learn about the progress made until now and to give input on the project's activities, become more familiar with the thematic focal points, NAIADES Dialogue offers an opportunity for a large number of interested key actors to communicate the background, concerns and context in which the sector is evolving. This broad involvement of existing and potential stakeholders helps get first-hand insights into the sector as well as feedback for steering and validation of the NAIADES II goals. In general, NAIADES Dialogue events are combined with thematically linked umbrella events in order to find synergies with both topics and participants. Such meetings are never solitary events; they are always combined with events already taking place where relevant players from the sector are invited to participate in order to achieve joint and stable results.

4 NAIADES DIALOGUE MEETINGS IN PRACTICE

This chapter offers a **chronology of NAIADES Dialogue Meetings that took place between project launch in 2013 and December 2014.**

Table 1 Overview NAIADES Dialogue Meetings

	NAIADES Dialogue Meeting back to back with ...	Organisors	Date
1	EDINNA General Assembly	STC	11 February 2014
2	Danube Business Talks	viadonau	19 March 2014
3.	Barge to Business	INE, VNF, PBV, Luxembourg Ministry, Panteia, BVB	20 November 2014
4.	CCNR Plenary Meeting	CCNR	17. December 2014

4.1 EDINNA Conference

On the 11th of February 2014, the first NAIADES Dialogue was organised back-to-back with the celebration of the first lustrum of EDINNA – Education in Inland Navigation Education and Training. Participants to the NAIADES Dialogue consisted of DG Move – European Commission, CCNR, Promotion Agencies for Inland Navigation, EU Social Partners as well as members of the Educational network EDINNA, where the discussions focussed on the ongoing process of modernisation and harmonisation of professional qualifications in inland navigation.

- **Main theme:** Professional Qualifications in Inland Navigation
- **Date and Venue:** 11.2.2014 in Brussels, Belgium
- **Target audience:** 89 participants
- **Organization:** STC

The link with the celebration of the first lustrum of EDINNA was established to discuss in a different group of experts the (pan)European efforts to modernize and harmonize the professional qualifications in inland navigation. During the day, the general goals of PLATINA-II and especially WP3 have been discussed, and the following topics were debated in depth:

- Ongoing initiatives of DG Move in the area of professional qualifications in inland navigation;
- Ongoing initiatives of the CCNR in the area of professional qualifications in inland navigation;
- Ongoing initiatives of EDINNA and an outlook to 2020

The discussion resulted in tangible actions for the educational institutes to be prepared for a new legal framework to come, where in addition the future activities of cooperation between the industry, competent authorities as well as educational institutes were discussed. Due to the number of stakeholders involved, the work programme of PLATINA II could be disseminated further.



4.2 Danube Business Talks



A clear illustration of the NAIADES Dialogue meeting layout was the first of the series of NAIADES Dialogue Meetings, which took place in the framework of Danube Business Talks in March 2014 in Vienna.

On this occasion, key players from the business sector and IWT stakeholders had an opportunity to meet with the Director of the European Mobility Network, Olivier Onidi, as well as with the European Coordinator of the Rhine-Danube corridor, Karla Peijs and discussed on a more casual basis the development of new markets for inland navigation in Europe.

- **Main theme:** New Markets for the Rhine-Danube Corridor
- **Date and Venue:** 19.3.2014 in Vienna, Austria
- **Target audience:** 138 participants (mainly shippers, logistics service providers and ports)
- **Web:** <http://www.viadonau.org/newsroom/events/talks/>
- **Organization:** viadonau

Danube Business Talks (also known as DBT) was introduced in March 2014 in Vienna as a new conference format for the Inland Waterway Transport (IWT) sector of the Danube Corridor. The purpose of DBT is to bring together the broad variety of IWT service providers on the Danube, link them to their existing and potential clients and facilitate contact with European transport policy makers. While the focus of the conference lies in the Danube region, many aspects are of interest for the IWT sector all over Europe.

Danube Business Talks 2014 offered the possibility to discuss innovative logistics solutions for IWT, to create new business relations on the Danube corridor, to debate European IWT transport policy for opening up new markets (i.e. "NAIADES dialogue") and to exchange ideas and develop networks.

Beyond the promotion of the project and of PLATINA 2, this Meeting brought the following benefits for the project:

- ✓ Opportunity of exchange between European decision makers, the sector (and national authorities)
- ✓ Promotion of Inland waterway transport in two promising market segments in the Rhine-Danube corridor among shippers (Siemens, Cargill, Bulmarket, etc.), ports (Danube Ports, Constanta, Rotterdam, Duisburg, etc.) and logistics service providers (e.g. Imperial Shipping, Fluvius, etc.)
- ✓ Collection of input for PLATINA 2 Tasks 1.1.3 (Market Transfer Conditions) and 1.1.4 (Market Transfer Roadmap)
- ✓ Latest information and market trends (e.g. presentation of France AgriMer, Port of Rotterdam, Imperial Shipping) and on issues that matter to the sector, such as infrastructure maintenance (PLATINA 2SWP 4.3)

- ✓ Detailed information on practical issues that need to be overcome for market transfer (e.g. different certification schemes as mentioned by Port of Rotterdam)
- ✓ Inputs for additional market segments that could be investigated further.



For further details on the outcomes of the meeting, reference is made to Annex 2.

4.1 Barge to Business

// Barge to Business

Your Waterway Transport Solution

Barge to Business are annual Business to Business events offering a stimulating and creative mix of formal and informal, structured and spontaneous, stimulating food for thought for all, as well as providing unrivalled networking opportunities and a New Business focused speed-dating event. Exclusive events for logistics decision makers that provide concrete and useful information about how to use the inland waterway transport supply chain, Barge to Business help companies share their innovative business experiences and generate new business opportunities and allow recent users to present why and how they made the move to transport by water.

- **Main themes:** Market Organisation & Innovation & financing - the ship of the future
- **Date and Venue:** 20 November 2014, Palais des Congrès, Luxembourg
- **Target audience:** 138 participants (mainly shippers, logistics service providers and ports)
- **Web:** www.bargetobusiness.eu
- **Organization:** INE, VNF, PBV, Luxembourg Ministry, Panteia, BVB, MINIENM

Divided-up into 2 sessions, **Innovation & financing: the ship of the future and Market organization**, this NAIADES Dialogue meeting was formatted as an open debate with all stakeholders based on an introduction by policy and business thoughts. On the basis of an introduction by policy and business thought leaders, an open debate with all stakeholders attending was launched.



Beyond the promotion of the project and of PLATINA 2, this NAIADES Dialogue brought the following benefits for the project:

- ✓ Opportunity of exchange between European decision makers and the sector
- ✓ Information platform on existing incentives and instruments to support infrastructure development, innovation and new services
- ✓ Inputs for additional market segments that could be investigated further.
- ✓ Inputs on the sector's views and challenges as regards to innovation.

For further details on the outcomes of the meeting, reference is made to Annex 1.

4.2 CCNR Plenary Session



Dating back to the Congress of Vienna (1815), the Central Commission for Navigation on the Rhine (CCNR) is the oldest international organization in modern history. It is an up-to-date international institution with an administration that enables it to address effectively all the issues concerning inland navigation. The CCNR promotes the development of close cooperation with river commissions as well as other international organizations working in the field of European transport policy and with non-governmental organizations active in the field of inland navigation.

This NAIADES Dialogue was held in conjunction with CCNR Plenary Session in Strasbourg on 9 December 2014. Market strengthening, the Inland Navigation Innovation agenda and forecast, the possibilities for an Electronic service record book and Good practices on waterway maintenance were the topics of the four presentations on the agenda of this NAIADES Dialogue.

- **Main theme:** actual developments of PLATINA II - Governance, Legislative implementation of NAIADES II and Innovation and financing)
- **Date and Venue:** 4 December 2014, Strasbourg
- **Target audience:** 50 participants (authorities, river commissions and logistics decision-makers)
- **Web:** www.ccr-zkr.org
- **Organization:** WVL

Beyond the promotion of the project and of PLATINA II, this Meeting brought the following benefits for the project:

Valuable feedback on intermediate results regarding the following activities:

- ✓ Identification new markets (PLATINA 2 SWP 1.1)
- ✓ Logistics decision support tool (PLATINA 2 SWP 1.2)
- ✓ Greening tool (PLATINA 2 SWP 2.1)
- ✓ Electronic service record book (PLATINA 2 SWP 3.2)
- ✓ Good practices inland waterway maintenance (PLATINA 2 SWP 4.3)

For further details on the outcomes of the meeting, reference is made to Annex 3.

5 LESSONS LEARNED

In a project, a lack of effective communication amongst interest groups can limit opportunities for shared learning and the development of participatory theory and practice. PLATINA 2 has designed a communication strategy based on direct communication and stakeholder participation that has brought technical and organisational support for policy actions as well as a strong interrelation with existing initiatives. One of the most important findings the NAIADES dialogue meetings have brought is that the benefits of such events are manifold; IWT promotion and umbrella-organizations see it as a great opportunity to integrate NAIADES Dialogue in their IWT-related events and the participative approach is facilitating acceptance and ownership for relevant PLATINA 2 results among a wider audience.

In other words, NAIADES dialogue meetings are bridging the gap between policy-makers and users, between the European Commission and external audience of potential end users, freight forwarders, authorities, fleet and terminal operators, potential shippers, different players from the ports sector. The open dialogue that characterises this inclusive approach and the welcomed feedback on intermediate steps and fostering guidance on next steps have obviously been having a positive impact on the sector as a whole. With the request for contribution from their side, the fresh approach and less formal meeting setting are all important elements of a new orientation towards stakeholder management and practice-oriented results research and information innovation topics, all these elements make NAIADES dialogue meetings a new and unique vehicle for progress and innovation in the IWT sector.

Throughout the period surveyed here, stakeholder engagement has been increasing steadily, direct dissemination increased and the transparency and visibility of the project and its results in the sector increased.

In conclusion, the following lessons can be learned from NAIADES dialogue meetings:

- ✓ Inland navigation needs innovative communication
- ✓ Joint initiatives can bear fruit
- ✓ Define messages adapted to your stakeholders
- ✓ Key stakeholders need direct communication
- ✓ A different stakeholder management channel adapted to the project needs does working
- ✓ Keep progressively monitoring communication activity and outcome - anyone can get involved:
www.naiades.info
- ✓ Stakeholders are not interested in source information, project information needs to be re-modeled and re-formatted to tie in with the receivers' concerns, needs and questions.

6 ANNEX 1: SUMMARY OF THE NAIADES DIALOGUE WITHIN BARGE TO BUSINESS (PREPARED BY INE)

Session Market organisation

The **session “Innovation & financing: the ship of the future”** introduced competitiveness and regulation as important drivers for innovation.

How to stay competitive and invest in times of crisis, how to deal with overcapacities and uncertainty? What new possibilities are available and should be made available to give SME better investment potential? were among the questions that were discussed.

The session “Strengthening market organisation” focussed on all-in supply solutions. These are indeed crucial to attracting more cargo on inland waterways.

“Can such logistics services be delivered by single ship-owners and how?”, “What market models contribute to structural strengthening and professionalization of barge owners to offer services that are well adapted to market demand and strengthen multi-modal waterway transport solutions?”, were among the questions discussed during the meeting.

Presentation

“Learning from Best Practices” by Henk-Erik Sierink, Dutch Ministry of Infrastructure and Environment

We need a business model that allows for innovation to take place. The Platina 2 consortium helps to implement the Naiades policy package to enhance quality and sustainability in inland waterway transport. It facilitates sector initiatives to strengthen the fragmented inland waterway transport sector and foster synergies between market players. We need to cooperate in these difficult times.

How can we better integrate inland waterway transport in the logistics supply chain? We studied the market structure of inland waterway services and investigated best practices in and outside the inland navigation sector, to learn from them and expand some of these collaborative models across the sector.

In Western Europe, there is a high fragmentation in inland waterway transport. Many operators only own one vessel. We see a clear imbalance in number of forwarders and brokers on one the side (85), and barge owners and operators on the other (5700). Volatility is high: operators have contacts with multiple brokers. Only 20% of the companies are active in commercial cooperatives, representing only 8% of the capacity in tonnes.

The high level individualism and fragmentation makes it difficult to adapt capacity to fluctuating market demands. It causes a lack of information and leads to fragmented investment decisions, thus leading to overcapacity. This individualism often leads to increased working hours of operators to compensate for lower revenue.

We had a look at other sectors and transport modes that face similar challenges e.g. deep sea and air transport. There are initiatives such as slow steaming and code-sharing that can inspire inland waterway transport. Within the inland waterway transport sector, cooperatives also exist. They allow for a more efficient multimodal focus with a higher service level. They create more stable relationships with shippers, higher efficiency and hence a more stable revenue.

In container transport, some operators already optimise their planning and resource utilisation. They integrate their offer better with terminal and rail services. They cooperate to do green marketing, offer new services, increase frequencies,... Cooperatives have many advantages: better services, higher reliability, productivity and flexibility as a group. So why don't we see more cooperatives? There are a number of barriers such as a culture of individualism, lack of information and awareness, entry and exit barriers for cooperatives,...

Let me end with some recommendations:

- We need to bring parties together in specific market segments to create win-win situations.
- It is important to share information about opportunities and impacts.
- Further analysis of the economic impact of cooperatives would be beneficial.
- We need to provide clear guidelines on legal possibilities to collaborate in inland waterway transport.

Panel Discussion

- Philip Maugé, Development Director, SCAT
- Henk Schipper, Co-founder and Manager, ELV
- Martin Quispel, Partner, STC-Nestra
- Jan Vogelaar, Director, Centraal Bureau voor Rijn- en Binnenvaart
- Marc Vanderhaegen, Team Leader Inland Waterway Transport, European Commission DG MOVE

Henk Schipper (ELV)

ELV is a Co-operation of 170 inland vessels based on the idea that we can be stronger and better together. We cooperate on logistics (e.g. cranes), equipment to bring cargo to destination,... Our Co-operation works with same size (small) ships, as they have same interest. It is important for cooperatives to structure themselves around a common element e.g. the type of cargo, the routes of navigation,...

When it comes to the independence of skippers, when joining a cooperative you need to give up some of your independence (there is a board of ship owners in ELV that takes strategic decisions for the Co-operation), but a cooperative also gives you many advantages, as the previous speaker listed. Also, it becomes easier to take holidays, for instance, because colleagues from the cooperative can take over the cargo. **Philip Maugé (SCAT)**

SCAT is a cooperative of 90 ship owners, who together have a transport capacity of 120 000 tonnes. In 2013 we transported 4 million tonnes and 65 000 TEU, good for 30 million euro turnover. Our main markets are gravel/sand and cereals, recycled goods, containers and oversized cargo, which we transport on the Seine bassin and the Canal du Nord.

We offer competitive prices and quality service to our customers. The board sets out the strategy and drives the cooperative. They dispatch the transport requests over the members in function of the size of the boats. That way we make sure everybody gets a decent revenue. The cooperative also has helped boat owners to obtain loans for new boats and push barges.

Jan Vogelaar (Centraal Bureau voor Rijn- en Binnenvaart)

The Central Bureau for Rhine and Inland Navigation is a branch organisation with 250 members of different sizes. Our biggest members own 300 ships, but there are equally single ship members. But also other stakeholders are part of our organisation, besides ship owners, e.g. operators, brokers, passenger transport,... As a central bureau for inland navigation, we have the capacity to be part of European projects and actions that benefit inland navigation.

Martin Quispel (STC-Nestra)

Martin Quispel agrees with the previous speaker. Cooperation has a lot of potential, not only amongst ship owners and operators, but also with brokers and forwarders. This will strengthen the position of the inland waterway transport sector. We can see similarities with the maritime sector. They have set up larger alliances, they share vessels, they do anything that is possible within the regulations. This is not only good for themselves but also beneficial for their clients.

To Cooperate or Not to Cooperate?

Henk Schipper points out that groups or cooperatives can specialise in certain cargo, types of vessels or routes, however they need to keep some flexibility. The cooperation should create synergies rather than pose limitations. Jan Vogelaar agrees. Even though increased cooperation is a solution for the fragmentation in the inland waterway transport sector, it remains a free market. We cannot interfere in what individual companies do.

Cooperatives and alliances make it easier to set decent price, adds Philip Maugé. They can ensure that certain minimum price levels are respected, which is positive for the working conditions. Jan Vogelaar continues this point: together we can increase professionalism and equip our members to react more efficiently to the market. However, we can only coach them. The decision remains theirs.

Marc Vanderhaegen (European Commission DG MOVE)

We can clearly see that the inland waterway transport sector is scattered. This has some disadvantages and weakens the sector to play a prominent role in the modal shift. Therefore, the Platina 2 project aims to support the inland waterway transport sector to overcome these challenges. But of course it is up to the market players to act on our suggestions.

We also need innovation in skills and raise the quality of training in the sector. Young people who leave school today are not up to speed with the practice, tools and technology currently used in sector. From a policy perspective, our legislation and standards date back from beginning of 90s. They need to be updated and modernised. That's why the European Commission is preparing a new legislative framework to support the development and recognition of qualifications. We hope this will make inland navigation professions more attractive, safer and more efficient.

More Cooperatives & Cooperation

Cooperatives account for 10% of the Inland Navigation sector. Would it be good to have more cooperatives? If there are so many advantages, why are these cooperatives not more successful?

Philip Maugé shares that his organisation is trying to enlarge its member base to increase its competitive position. Together we can provide more services to our customers. We also need to support new skippers to enter the market. Cooperatives, for example, can help to obtain initial investment and cargo.

Martin Quispel points out that it is important to have a critical mass (a sufficient number of vessels). This will give the cooperative more power to negotiate with terminals, for transshipping, etc. Cooperatives are particularly useful for small vessels to combine forces. Jan Vogelaar presented their 'Maatwerk programme' (Tailormade Logistics Solutions programme) that shows barge owners, operators and broker the advantages of cooperation. Together we develop an offer clients can't refuse.

The Chicken and the Egg

How do you start and expand cooperatives? Henk Schipper made the point that they can only sell the volumes the ships can carry. We started with 40 skippers and developed a stable offer throughout the years. When there is an attractive offer, the cargo will follow.

Philip Maugé confirms. The markets are there. Our cooperative has successfully taken advantage of them. We adjust our capacity to the market demand with new boats and members. They join our alliance for a one year trial period, to make sure there will be sufficient cargo, before they become full members.

Henk Schipper says that cooperatives are more followers on the market, rather than actively steering the market demand and organisation. We reply to the demands of our customers. But surely, the fact that we are a Co-operation, gives us more flexibility in how we reply to that demand.

Jan Vogelaar complements that single ship owners also have their commercial networks. Brokers also cooperate more structurally with a number of barges etc. So there is quite some informal structural cooperation too, be it in more fluid compositions than a formal cooperative.

The following benefits were identified as outcome of this session:

- ✓ Opportunity of exchange between European decision makers and the sector
- ✓ Information platform on existing incentives and instruments to support infrastructure development, innovation and new services
- ✓ Promotion of Inland waterway transport as a global market with focus on all-in supply solutions
- ✓ Inputs for additional market segments that could be investigated further.

Presentation

The Need for Greener Vessels, by Gert Mensink, coordinating policy advisor, Dutch Ministry of Infrastructure and Environment

Inland navigation has always been known as a sustainable mode of transport. However, because of the enormous progress the road sector is making, this advantage is eroding. If inland waterway transport wants to keep a place between road and rail as a viable alternative, it is important that the vessels reduce their emissions.

Inland navigation is using engines with a long life span. As a result, the fleet does not keep up with new technology to reduce emissions. We need to start a process to green the fleet. LNG, for instance, is a clean and low-cost fuel suitable for inland navigation. However, due to the high investment cost, retrofitting LNG installations is not suited for all vessels.

All vessels will have to reduce their emission. For an emission reduction policy to be effective, efficient and realistic, we should target all energy sources on board the vessels and not only the propulsion engines. There are alternative measures to reduce emissions, e.g. on the level of auxiliary engines, cargo heating, hybrid propulsions, propeller enhancements, slow steaming,

Ship owners should make their own choices. For each vessel, we need to find the measures that fit best. Platina 2 developed a web-based 'greening tool' that evaluates the effectiveness of measures in both cost and emission reduction potential, based on the specific technical and financial characteristics of a particular vessel. Moreover, the tool gives links to suppliers that can implement the proposed measures.

Besides the technical side of innovation, ship owners also need to be able to finance emission reductions. Therefore a wide range of financial instruments are needed. Platina 2 has updated the funding database this year, which you can find at www.naiades.info/funding. On the EU level, a working group is analysing the financial instruments to see how they can be better tailored to inland navigation. But also the Members States' financial instruments need to tie into that.

In the Netherlands and Belgium some organisations act as intermediaries between all involved parties to help ship owners find the right measures, choose dealers, find grants and assist with financing. Should we have a similar structure on European level?

Panel Discussion

- Lucia Luijten, Head of Unit Inland Shipping and Waterways, Ministry of Infrastructure and Environment (NL)
- Bernard Jehin, Member of the Executive Committee, Sowalfin
- Ben Maelissa, Group Director & Co-Owner, Danser Group
- Patrick Steenacker, General Manager, Pegasus Shipping
- Manfred Seitz, Coordinator, LNG Masterplan

Ben Maelissa (Danser)

Danser was the first operator to refit LNG on an inland vessel. Because of the lack of space, we had to put the LNG tank in the cargo hold. We custom built a tank room, so that we can put containers on top of it. That way we managed to limit the loss of cargo space to 6 TEU.

Our pilot LNG vessel “Eiger-Norwand” now carries out between 26 and 32 roundtrips from Antwerp or Rotterdam to Basel (CH) yearly and does so between 90-95% on LNG. This makes transport 20-25% cheaper because of lower fuel costs compared to diesel. The huge investment will pay itself back in 7 years, also thanks to an EU grant we received for the LNG installation.

Another challenge was training. Sailing a ship on LNG is completely different from a diesel propelled boat, so we had to invest as well in personnel development. Some other advantages of LNG are that LNG produces less noise and bunkering, which took half a day previously, now only takes 3 hours.

Manfred Seitz (LNG Masterplan)

In 2012, we came up with the idea to support the implementation of LNG as a fuel and as a cargo for inland navigation. The IWT industry was interested because of the price gap with diesel. Also the forthcoming stricter regulations on emissions created momentum for the beginning of a shift to LNG, as this could help inland navigation to meet the request for greener modes of transport.

If we would like to make use of LNG as a fuel, it became clear that we needed to bring authorities and the private sector together to create a legal framework for it and to provide the needed funding. It was a long procedure to allow gas as a standard propulsion mode. We also needed to develop supply options, quantify pioneer markets and elaborate technical standards.

The main purpose now is to come up with technical concepts for retrofitting vessels and terminals with LNG and implement those solutions. We are currently also preparing a feasibility study to build LNG stations along the Rhine/Meuse-Main-Danube. We need to cooperate with other sectors for that, because there are currently not enough LNG vessels to make those stations viable.

Lucia Luijten (Dutch Ministry of Infrastructure and Environment)

Greening inland waterway transport is important. But it is up to ship operators to do the investments. We as a government only set out the objectives. We also create a level playing field in Europe, together with the CCNR and the European Commission, because transport is an international business.

As regards to the LNG network, we have to organise fuelling stations along the Core Network and the Corridors. We have contacts with firms that want to start fuelling points, so I foresee this to happen in the next few years.

Patrick Steenacker (Pegasus Shipping)

Financing for innovation are mostly only accessible for bigger players in IWT. For example, retrofitting vessels with LNG is a big investment, which is not feasible for smaller barges. Furthermore, strict environmental regulations are more difficult to comply with for small barges than for bigger companies.

Finances are certainly an obstacle for innovation, but there are also other challenges we need to deal with. Training, for instance, has to be modernised. Skippers who leave school today know very little about all these new systems. Schools/training should teach the new generation operators about the possibilities of the future.

Bernard Jehin (Sowalfin)

Skippers are suffering quite a lot since the crisis. Instead of thinking about green investments, they are struggling to survive. We try to facilitate access to finances, but since 2008 investments have dried up. Our business model is based on the cooperation with banks. They are vital to provide funding to SME. Sowalfin does not do direct lending, we only grant subordinate loans or guarantees.

The last years we only had one application per year for the acquisition of new boats, however there were some more requests for support for the modernisation of vessels. We offer operators in Wallonia an automatic guarantee of 75% for credits of up to 25 000€, which can be combined with a subordinated loan for half the amount of the bank credit. With this support, skippers can acquire new equipment, radar systems, a new engine,...

We also see that the access to business for new shipmen is very difficult. The young people are not interested to enter the inland navigation sector. They might have concerns about the quality of life on a boat, but the lack of

financing also plays a role. If young persons do not have a skipper in the family who passes on the trade, they have no chance.

We need to make inland navigation more attractive and promote it to a new generation of skippers. Otherwise we will run into problems to renew the fleet and stimulate young people to work in the sector

Intermediary Support Structures

Ben Maelissa (Danser)

Maybe we don't need to start from scratch to create intermediary support structures on European level. In Belgium and the Netherlands such intermediary structures already exists (e.g. Innovation Centre Binnenvaart, NL). Why don't we upgrade them to become European support centres?

Lucia Luijten (Dutch Ministry of Infrastructure and Environment)

We are aware of the fact that it is difficult to reach the many SMEs in the inland waterway transport sector. Ministries talk to the bigger players. That is why we see an important role in this debate for intermediary structures and organisations representing smaller shippers.

7 ANNEX 1: SUMMARY OF THE NAIADES DIALOGUE WITHIN THE DANUBE BUSINESS TALKS (PREPARED BY VIADONAU)

“NAIADES dialogue” is designed as a exchange and discussion platform for IWT policy among all relevant stakeholders. This part of the Danube Business Talks brings practitioners (logistics service providers, ship brokers, customers etc.), policy makers (e.g. European Commission, Chamber of Commerce), sector representatives (e.g. European Federation of Inland Ports) and any other interested parties together, in order to enable strategic debates on how policies can support the development of new markets for IWT in Europe. The “NAIADES dialogue” is both an opportunity for policy makers to communicate their strategies and policy instruments as well as a chance for practitioners to place their feedback and ideas.

Programme “NAIADES dialogue”:

The morning session addressed general, strategic issues of European policy for the promotion of IWT. The speakers were:

- Hans-Peter Hasenbichler, Managing Director, viadonau
- Olivier Onidi, Director European Mobility Network, European Commission
- Kathrin Obst, Director European Federation of Inland Ports
- Simon Hartl, Head of Team Transport Developments, viadonau



The moderator, Mr. Steve Chaid, welcomed the audience and the special guests of honour, continuing with a brief programme overview and asking Mr. Hasenbichler to welcome the participants on behalf of viadonau.

After the opening words Mr. Hasenbichler introduced viadonau, its responsibilities and goals. He pointed out that the two EU-funded programmes PLATINA II and INWAPO enabled viadonau to host the DBT and offer a platform for ideas exchange. He mentioned that the event focuses on, high&heavy cargo and biomass and wished everyone a successful event.



Mr. Onidi was invited to hold his speech. He stated that the EUROPE 2020 Strategy and the 2011 White Paper “Roadmap towards a single European transport area” which includes the shift to more environmentally-friendly modes of transport, sets the overall framework. The conditions for the shift were set in the NAIADES II programme, as he said. Mr. Onidi continued with an explanation of the EU instruments and policy network. Firstly, he introduced TEN-T/CEF Policy with a total budget of €26 bill. and mentioned that not only member state authorities but also private business can apply and ensure funds for e.g. sustainable transport services. Also important, he said, were Cohesion funds which can be used for the improvement of administrative and technical capacity for project development. Mr. Onidi stated that promoting IWT was a priority for the EC and that NAIADES II was adopted in order to make better use of IWT. At the end, he presented the six key interventions of the programme in detail (infrastructure, market functioning, innovation, professional qualifications, emission standards, integration of IWT into the multimodal chain).

The next presentation was held by Ms. Obst. She started with a brief introduction of the European Federation of Inland Ports (EFIP) and presented transport volumes on EU waterways. She stressed out that in 2013 growth can be expected for liquid bulk, in particular chemical products. Ms. Obst pointed out that due to the expected growth of EU population living in urban areas, the increase of freight transport, cost of congestion and EU’s aims to have CO2-free city logistics by 2030, inland waterways transport presents as a sustainable and efficient distribution mode of transport within the city. Finally, she presented two market trends namely, biomass and high&heavy cargo which are predestined for waterway transport.



The last speaker in this session was Mr. Hartl from viadonau. He presented the existing potentials for the Danube region, referring especially to the industrial, agricultural and forestry areas and the corresponded products along the river. He continued with the results of the INWAPO market review analysis (output 5.2.2), where nine types of cargo for a modal shift were identified.

He focused on biomass and high&heavy cargo and showed the Danube ports and transshipment sites with available equipment for the two cargo types.

Mr. Hartl ended his presentation with an overview of the two viadonau initiatives for biomass and high&heavy which included experts' workshops, information exchange and positioning of the subject in the context of trade fairs and events.

The afternoon featured two parallel sessions on developing new markets for IWT in Europe:

1. Transport of High&Heavy goods

The session was moderated by Ms. Gudrun Maierbrugger, Project Manager at viadonau.

The speakers were experienced in handling high and heavy transports and gave detailed insights in the potentials and challenges:



- Wolfgang Draaf, Managing director and member of the board, Heavy Transport and Rigging Association of Germany
- Patrick Schäffer, Managing Director, Rhenus Logistics Austria GmbH
- Friedrich Weigert, Managing Director, Kühne + Nagel Euroshipping GmbH
- Horst Felbermayr, CEO, Felbermayr Holding GmbH
- Markus Bangen, Member of the Board, Duisburger Hafen AG

After the presentations a questions and answers session followed.

The moderator started the session by asking the panel, how we could get more public funds and involvement of the political decision makers, when talking about infrastructure.

Mr. Weigert replied that the money was there, the problem was however the lack of political commitment. The number of involved parties and interests is too high; at the end it's the same status as before; The problem is the regional authorities. The EU should be more active in her role as pusher?

The projects take too long and are too theoretical; what is needed is more practical work on the waterway – We need centimeters!

Mr. Sasa Jovanovic from iC Consulanten emphasized that in the multiannual TEN-T calls, only about 3% are from Danube countries and that the initiative from the Member States is missing!

Mr. Weigert responded that private companies and industries should be the engine of the change to have better infrastructure. "We need to create demand in terms of tons transported in order to get the Member States investing".

Mr. Bangen added that the transport operators always argue for infrastructure; an **alliance** with customers was needed to approach the regional authorities and raise awareness that jobs are at risk in their area if they do not care for the waterway infrastructure.

Mr. Hasenbichler made clear that the main challenge and goal was to ensure 2.5 meters fairway depth in the next years. There are so many critical stretches on the Danube - all countries should have common/minimum standards. Industry in her role as customer should put pressure on the national governments to improve infrastructure.

Mr. Onidi agreed that the Infrastructure was vital to economy and EU knew that very well. In the crisis years, the transport budget was the only one that was increased; numerous parties approached the EU with wish lists and the EU established an efficient selection in the core network; the advice was not to wait with projects; nevertheless, local and regional authorities need to be involved, as only a part of the funding is provided by EU. Even if many Danube countries have other problems than caring about waterway infrastructure, they should invest in it.

2. Transport of Renewable Resources and Biomass:

The second parallel session in transport of renewable resources and biomass was moderated by Mrs. Bettina Matzner, Project Manager at viadonau.

The panel members were:

- Xavier Rousselin, Senior economist, FranceAgriMer
- Mihai Csabai, Manager Trading Division, RodBun Grup SRL
- Jürgen Helten, Managing Director, Imperial Shipping Group
- Botond Szalma, Managing Director, Plimsoll Ltd and Fluvius Ltd
- Hugo du Mez, Business Developer Dry Bulk & Energy, Port of Rotterdam Authority



After the presentations the moderator asked the audience to comment and/or ask questions.

Ms. Sanja Bajic from the Technical University of Novi Sad pointed out that biomass is the future market, having in mind that all EU countries signed to reach the goal of 20% biomass. She stressed out the Serbia should be considered as a partner for calls and cooperation.

Mr. Peter de Kiewit from Damen Shipyards raised the question to Mr. Szalma, if there was enough cargo for IWT. The response was a clear yes, clarifying that the railway was a great competition and that railway draws off cargo from the river. The unstable water level was a great problem too. He pointed out, that in the year 1999 due to the war in Serbia, 80% of the IWT disappeared, however only 60% returned and 20% was shifted on trucks and that the IWT wants its piece of the cake.

Mr. Marc Vanderhaegen from the EU Commission pointed out that the Commission was committed to develop waterways; however the EC has its limitation. The most inputs and tasks must come from national agencies e.g. waterway maintenance. The EU can help, although with limited funds (€27 bill. for 7 years). For that reason projects have to be very well prepared and co-financed. If there are sufficiently good projects, the EC will push them forward.

Mr. Botond Szalma responded that the EC is the strongest party and someone had to do something, since there are 51 bottlenecks only in Hungary and since 2 weeks the fairway depth amounts only 1.7-1.8 dm.

Finally, Mr. Markus Simoner, Head of Team Waterway Management at viadonau and responsible for the maintenance, stressed out that the EC's role is to support but the countries have to do their homework. He informs the audience that there will be a Danube Master plan for Maintenance finalised in summer 2014, where all the relevant figures regarding funds are stated. The ultimate goal is that the document will be ratified by the transport ministers. It will include a clear statement what will be financed by the countries and what by the EU.

The moderator Mrs. Matzner thanked the speakers and the audience for the informative presentations and lively discussion.

8 ANNEX 3: NAIADES DIALOGUE IN CONJUNCTION WITH THE CCNR PLENARY SESSION

Mr. Mensink (Dutch Ministry of Transport and the Infrastructure) opened the meeting and thanked the CCNR secretariat for their hospitality, explained the outline of PLATINA II and presented the 4 main topics of the afternoon:

- Market strengthening
- Innovation agenda and forecast
- Electronic service record book
- Good practices on waterway maintenance

Mr. Theologitis (European Commission) stressed important role of NAIADES II in developing the inland navigation further at European level, he valued the active involvement of the Member States, River Commissions, professional organizations but also PLATINA and PLATINA 2.

Mr. Quispel (STC) presented the PLATINA II's work on market mechanisms and transparency.

Mr. van Dijk (BLN) appreciated the study and asked if a prognosis until 2020 is made as regards to the dry and wet cargo.

Mr Kreidl (CCNR Secretariat) referred to the market observation and invited Mr. Quispel to double-check the findings-

Mr. van der Werf (CCNR Secretariat) pointed out the development of specialization, which might be leading towards the need for vessels in specific niches, despite the overall low growth rates of the sector.

Mr. ten Broeke (Dutch Rhine Commissioners) remarked that the study so far is only a desk-research, while the input from customers was hardly taken into account.

Mr. Quispel (STC) amended that the customer demands are included in the study.

Mr. Nilles (Luxembourg Ministry of Transport) asked on the source of the market potential (37 Mil.t) and if the detailed results are available for the various basins.

Mr. Quispel answered that ETIS plus was the source of the analysis.

Mr. Mensink asked who will take this up

Mr. Theologitis pointed out that the European Commission that a seminar on this topic is currently under discussion.

Mr. Sierink (Dutch Ministry of Transport and the Infrastructure) presented the Innovation Agenda.

Mr. Theologitis (European Commission) outlined the EU's role in sponsoring innovation projects (via the Connecting Europe Facility or the H2020 facility) and called upon the various actors to continue with a coherent approach for research. He pointed out that the new Commission focus on the "optimal size" for each project.

Mr. van Dijk (BLN) confirmed the need to harmonize the approaches towards the financial institutions.

Mr. Mensink (Dutch Ministry of Transport and the Environment) states that the branch organizations should become more active in this. This was confirmed by several member states.

Mr. van Reem (STC) presented PLATINA II's activities as regards to the Electronic Service Record Book.

Mr. van Dijk (BLN) appreciated the initiative towards less administration on the vessel. If the cost of such systems are known, they should be communicated and compared with the benefits.

Mr. van Reem (STC) pointed out, that a clearly positive cost/benefit ratio exists and amended that a digital tachograph is not necessarily needed in all options.

Mr. Mensink (Dutch Ministry of transport and the Environment) stated that some centralization would be required.

Mr. Pauli (CCNR Secretariat) asked if a legal analysis has been done.

Mr. van Reem (STC) pointed out that this has not yet done.

Mr. Mensink (Dutch Ministry of transport and the Environment) stated that the concept develop in PLATINA 2 focused on the technical feasibility, the follow-up project should more include the organization, legal and privacy-sensitive issues.

Ms. Maierbrugger (viadonau) presented PLATINA II's activities in relation to the waterway maintenance expert group.

Mr. van Dijk (BLN) suggested the lower Ems as an additional area to be investigated.

Didier Beaurain (French Ministry of Transport) suggested that waste regulations should also be within the scope.

It was remarked that the Flemish Government has started on a working group on the good navigation status with all concerned stakeholders.

Mr. van Dijk appreciated the initiative of a NAIADES Dialogue in order to learn on the PLATINA project.

Mr. Mensink referred to www.naiades.info, where all information is available and contact persons are listed and closed the meeting.