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2010 Theme: Opportunities and challenges for intermodal transport by inland waterways

Impact of competition, business models, infrastructure investment and public hinterland ports for the development of inland navigation

Transmitted by the German Promotion Center for Intermodal Transport (SGKV)

1. Inland waterways are a crucial part of the European transport infrastructure and support the European industry in global competition. United Nations Economic Commission for Europe (UNECE) member States as owner of inland waterways had and have an important role to guarantee fair competition and indiscriminate access to inland waterways. The development of container transport on European inland waterways in recent years proves that the competition of operators of inland ports and inland navigation is the key to use inland waterways in direct competition to road and rail transport of containers.
2. Specifically on the river Rhine, but also on other major European inland waterways, a wide range of operators of navigation and ports can be observed. They differentiate themselves by following different business and operational models. In this way they serve the needs of shippers and logistic operators to shift container transport from road to inland waterways. These different approaches to business should not be underestimated and will be an important trend in the further development of container transport on inland waterways.
3. On the other hand, inland port operators successfully integrate additional parts of the supply chain (e.g. value added services) into their portfolio to enhance the benefits for their customers and to offer them one-hand or one-stop-services.

4. The objective of transport policy should be to support these business developments and develop adequate inland waterway infrastructure. Infrastructure investments have to be provided by UNECE member States, for example, by:

- deepening waterways;
- extensions of locks;
- investments in new generations of inland vessels.

5. Improvement of infrastructure must of course be related to a real demand for inland navigation and container handling.

6. The common ownership of inland ports by municipalities, countries or regions should be seen as a great advantage. Their ownership guarantees a general business approach of inland ports that benefit from:

- simultaneous handling of containers, bulk cargo and liquid cargo;
- sustainable financial background by State authorities;
- availability of real estate for the industry (shipper) with intermodal access.

7. By supporting such ownership, UNECE member States could have direct influence on the sustainable development of transport flows.

8. On the site of the operators for inland ports, two general approaches exist:

- Stand-alone port operators that provide, mostly exclusive services for their regional intermodal transport partners;
- Networks of inland ports and inland navigation to provide synergies for productivity and efficiency.

Both approaches have their advantages and should be further developed in UNECE member States.

9. By developing professional business models, operators and inland port owners have to consider how to cooperate with European seaports and ocean carriers. Public ownership can help to develop a well balanced business relation with seaports and ocean carriers. This can result in cooperation as equal partners to protect against possible mergers and acquisitions (M&A). On the other hand, the wish to control the supply chain is evident and is pursued by dedicated terminals (e.g. Maersk in Neuss). This is also a contribution to the diversity of inland water navigation and inland port operation and can thus be seen as a positive development too.

10. Use of inland waterways could be supported by UNECE member countries by:

- improving European inland waterways according to the European Agreement on Important International Combined Transport Lines and Related Installations minimum standards
- privatizing inland port operators (not ownership);
- deregulating inland navigation operation on inland waterways;
- enhancing investments in logistics related to real estate in inland ports.
