

Welcome Address – Willem Vuylsteke

Ladies and gentlemen,

As IWT director at the Flemish department of Mobility and Public Works and Belgian commissioner to the Central Commission for the navigation of the Rhine (CCNR), it is a great pleasure to welcome you today at this workshop on the market opportunities for inland waterway transport (IWT) in Europe's energy and circular transition.

Belgium is blessed with more than 1,500 kilometres of navigable waterways, more than half of which are part of the European TEN-T network, and we occupy a central position within the European inland waterway system. Our waterways connect Belgian ports to the hinterland and to major European logistics corridors.

Although the Rhine does not flow through Belgium, Belgium is a proud member state of the CCNR and a major player in Rhine shipping. The Rhine is of great importance for the Belgian economy, especially for our ports such as the port of Antwerp-Bruges and the Port of Liège. Belgium is also home to a strong industrial and logistics base, with major sectors such as chemicals, petrochemicals, steel, construction, energy and agri-food. These sectors generate large and regular transport flows. Many of them are located close to waterways or within port-industrial clusters, which makes inland navigation a suitable transport mode to directly serve these production sites, distribution hubs and the broader international logistics chains. Inland navigation is therefore a strategic part of our freight transport system and of our vision for a sustainable transport system.

So that is why we are honoured to host this workshop here in Brussels, a city that is not only the capital of Belgium, but also a place where European policy is shaped every day. It is therefore a fitting location for a discussion on the future of inland navigation, a sector that is deeply connected with European cooperation, cross-border transport and shared policy objectives.

First and foremost, I would like to thank all of you for taking the time to participate in this workshop. Your presence matters. The challenges and opportunities we will discuss today cannot be addressed by one actor alone. Inland navigation is part of a wider logistics system. It links sea ports, inland ports, terminals, warehouses and industries. That is why it is so important that we have people around the table from across the full supply chain.

My gratitude goes also to the two actors who brought us together: the European Commission (EC) who launched the idea of this workshop and the CCNR that organized the workshop and demonstrated again their role as centre of knowledge in inland navigation in Europe besides their role as regulator and platform for cooperation between the Rhine countries. When the CCNR and EC join – in full respect of their competences - their forces inland navigation benefits. A pragmatic and results-oriented approach delivers. So this workshop shows that cooperation between the river commissions and the EC strengthens the policy making process on inland navigation in Europe and is needed to address the challenges we are facing.

One of these challenges is the declining transport volumes in inland water transport and the faltering modal shift towards IWT. A modal shift towards inland waterways remains nevertheless a key policy objective, both at European and national level. But progress has proven difficult and slower than anticipated. The CCNR market observations show that traffic volumes have generally stabilised since the Covid-19 period, but they remain lower than before the pandemic.

If we want to bring the modal shift back on track, we need to address both structural challenges and the changing dynamics of the market.

We need to identify new markets, anticipate new logistics needs, and understand how new cargo flows can be integrated into IWT. On the demand side, the outlook for some traditional

goods segments points to saturation or even decline, for example in relation to coal. A possible structural slowdown in world trade also creates uncertainty. At the same time, the energy transition is changing the product portfolio of inland navigation. It may reduce some flows, but it can also create new markets and new opportunities. The sector will need to adapt in order to capture those opportunities.

On the supply side, inland vessels are increasingly confronted with difficult navigation conditions due to low-water periods which are expected to intensify as a consequence of climate change. This affects loading capacity, reliability and ultimately the competitiveness of IWT. It also shows the importance of resilience, diversification and innovation in the sector. Innovation will be one of the elements which we will need to tackle our challenges. Inland navigation must be prepared for the future, and that requires for example embracing new technologies. In Belgium, this transition is already underway, notably through the development of automated navigation. Flanders has taken a leading role by establishing a few months ago the first permanent legislative framework to support this evolution but additional steps are necessary to further facilitate cross-border automated navigation.

But innovation in itself will not be enough. It is also a question of a smoother organization and cooperation to be prepared for the future. Effective cooperation between all actors—ports, operators, shippers, industries and authorities—is needed to ensure efficient flows, reliable planning and smooth operations across the chain.

That is why I am pleased to see such a rich programme today. It combines industrial perspectives, operational experience, and port and logistics points of view. This diversity is valuable. It reflects the reality of inland navigation as a multimodal logistics system and it creates the conditions for a practical, results-oriented discussion.

Today's workshop is an opportunity to contribute to a future-proof inland navigation. Sharing knowledge, identifying barriers, exploring new markets and developing innovative ideas will be necessary to tackle our challenges.

Let me conclude by wishing you all a productive, open and engaging discussion. I hope today's exchange will lead to concrete ideas, useful insights and a renewed sense of common purpose. Inland navigation has a strong future, but that future will depend on our ability to adapt and our ability to work together across borders, across sectors and across the full logistics chain.

Thank you, and I wish you a very successful workshop.