

Increased institutional capacity in Danube navigation by boosting joint transnational competences and skills in education and public development services



Report on Danube navigation promotion demand

Document ID:	D 4.1.2- Report on Danube navigation demand	
Act.:	4.1 Analysis of state of play in the Danube modal share promotion & Development of working programme	
Author / Project Partner:	Date:	Version:
Benedikt Grath/ VIA	21/09/2017	V.0.0
Milica Gvozdic/ VIA	29/09/2017	V.0.1
Benedikt Grath / VIA	05/10/2017	V0.2
Simon Hartl / VIA	10/10/2017	V.0.3
Benedikt Grath / VIA	10/10/2017	V0.4
Benedikt Grath, Simon Hartl / VIA	30/10/2017	V1.0

Table of Contents

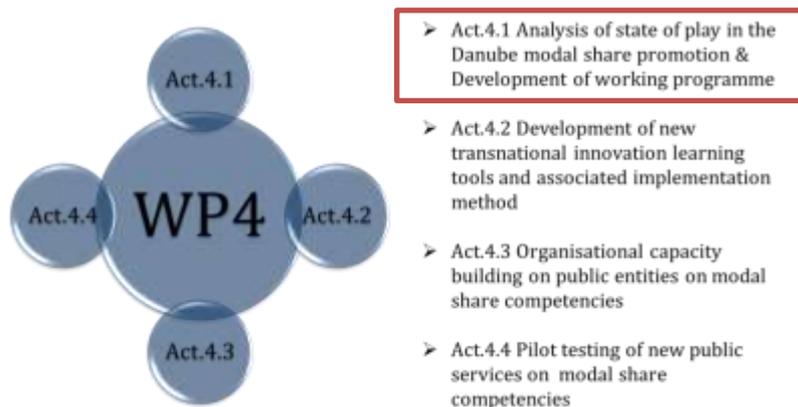
1. INTRODUCTION.....	4
2. METHODOLOGY	6
3. DESCRIPTION AND IDENTIFICATION OF TARGET GROUPS AND STAKEHOLDERS PER COUNTRY	8
4. COLLECTION OF NEEDS OF (POTENTIAL) USERS OF DANUBE NAVIGATION FOR INFORMATION, SERVICES AND TOOLS	9
4.1. Results of the online survey – Danube Logistics Service Providers.....	9
4.2. Results of the online survey – Cargo Owners.....	16
5. TRANSNATIONAL CONCLUSIONS.....	23
6. ANNEXES.....	24
6.1. Template of Survey: Demand of Logistics Service Providers for information/tools/services related to Danube navigation.....	24
6.2. Template of Survey: Demand of Cargo Owners for information/tools/services related to Danube navigation.....	34

1. INTRODUCTION

Act. 4.1. Analysis of state of play in the Danube modal share promotion & Development of working programme

Duration of Act.4.1: 01/2017 – 10/2017

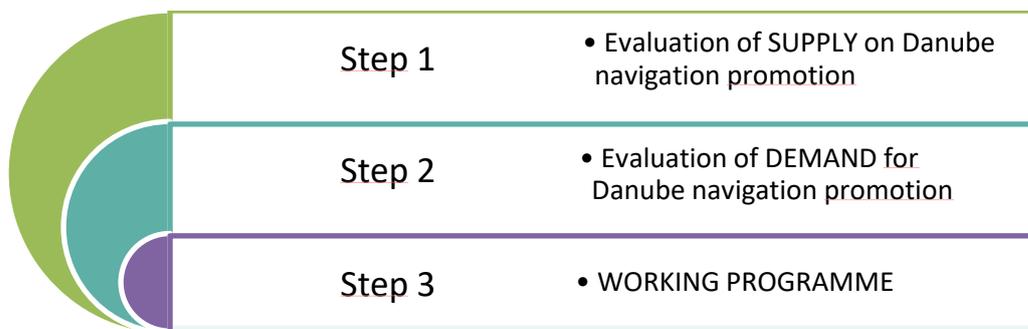
Involved partners: VIA, ARVD, CER, CRUP, DST, UT, FHO, PGA, RSOE, UPIR & ASP VBW



The analysis of state of play in the Danube modal share promotion & development of working programme is the first action in the implementation of WP4 which aims at increasing the know-how and information portfolio of responsible administrations for being capable of providing improved information & promotion services on Danube navigation (→ DANUBE LOGISTICS PROMOTION CENTRES) to interested parties such as cargo owners and logistics service providers.

One main goal is to develop a country-specific one-stop-shop that collects all relevant information of Danube navigation, meaning that there is one contact point per country. The development of such one-stop-shops according to the needs concerning inland waterway navigation requires transnational knowledge and competences in order to enable information exchange and to reach a broad market response.

Act. 4.1 consists of three steps, namely the evaluation of supply on Danube navigation promotion, the evaluation of demand for Danube navigation promotion and the working programme, based on steps 1 and 2.



The following report summarizes the results of step 2 - evaluation of the demand for Danube navigation promotion. The main goal of this report is the evaluation of demand for information in Danube navigation promotion, which will be performed by receiving feedback from market operators (industry, cargo owners, and freight forwarders). The report will point out the demand for information in order to increase transnational knowledge in inland navigation by using or developing existing services and information tools in each country (future national one-stop-shops or promotion centres).

The evaluation of the demand for Danube navigation promotion is again divided into 4 sections:

- Methodology of the interview survey
- Description and identification of target groups and stakeholders
- Collection of needs of (potential) users of Danube navigation for information, services and tools (gap analysis)
- Transnational conclusions

The last part of the evaluation of the demand for Danube navigation promotion is the identification of conclusions and findings in all Danube countries. The report points out and analyses existing gaps of Danube navigation promotion centres and information tools.

2. METHODOLOGY

The basis of this report is the evaluation of the demand on Danube navigation promotion, consisting of information, tools as well as services. The needs and requirements of the identified users of Danube navigation are evaluated by carrying out interviews. The report presents the survey results and analyses the existent gaps between the present information services and the needs of the stakeholders. The methodology of the conducted demand survey is described in the following sections.

As a first step of the demand evaluation, potential interview partners for each country were identified by each project partner and a list of potential interview partners was set up. Potential interview partners were direct beneficiaries respectively (potential) users of information and services in terms of inland navigation.

The questionnaires and the guidelines for the interviews were prepared in close collaboration by FHOO and VIA. The interviews were conducted by each project partner (DST, VIA, FHOO, ARVD, RSOE, CRUP, PGA, CER, UPIR and UT). Both questionnaires are further subdivided into following seven thematic blocks (see also interview templates in chapters 6.1 and 6.2):

1. Fairway information
2. Ports & terminals
3. Transport companies
4. Funding schemes
5. Market opportunities
6. Danube navigation promotion
7. Human resources development (education & training)

Each project partner has been encouraged to conduct at minimum one or more personal interviews per country. If face-to-face interviews could not be carried out due to time respectively staff restrictions on the interviewees side or due long distances between the interview partners, alternatively phone interviews were conducted. The interviewed company had to be located within a radius of 100 km of the Danube in order to ensure high relevance of the waterway for the company's logistics planning and the interviewed person should be in charge of logistics in the company.

The collected feedback from stakeholders (cargo owners and Danube logistics service providers) from different countries was evaluated, shared and discussed among all WP4 partners during the WP4 meeting which took place on 12 September 2017 in Vienna as well digitally in order to increase knowledge and awareness about the sectors' current and future needs.

The evaluation results of the demand for free-of-charge information and services on Danube navigation are then reflected in the working programme in order to meet the needs and to close the identified gaps.

After conducting the interviews, each project partner submitted the completed interviews into the online tool, which was set up by FHOO. The online analysis tool enables an easily statistical evaluation of all conducted interviews. During the entire work period, a regular and extensively

exchange was carried out among the project partners FHO0 and VIA, especially in terms of the status quo with regard to the quantity and quality of submitted data. The statistical analysis of the submitted interviews was carried out by FHO0. For technical reasons FHO0 inserted a dummy dataset into the survey tool in the cargo owner section (under the category “no answer”, see chapter 4.2). This is the reason why the total number of performed interviews of the cargo owner section does not correspond to the overall number stated in the diagrams in chapter 4.2 (one additional virtual interview is displayed).

The actual demand for Danube navigation promotion and the gap analysis was evaluated on basis of the statistical analysis by VIA and is summarized in this report. Due to data protection and explicit wishes from the interview partners, the interview evaluation was carried out anonymously; thus possible allocations from the evaluation to individual interview partners is not possible.

The main components of this report are as follow:

- The identification of target groups and stakeholders of existing and potential users of Danube transports per country
- Collection of needs of potential users of Danube navigation for information, services, tools & regulatory changes

3. DESCRIPTION AND IDENTIFICATION OF TARGET GROUPS AND STAKEHOLDERS PER COUNTRY

This section deals with the description and identification of the two identified target groups of potential stakeholders which were consulted during the interview period.

The first specified target group of possible interview partners consists of **Danube logistics service providers** (shipping and forwarding companies, ports, etc.) who have in general experiences in Danube navigation and have a good insight into the needs of required information services regarding to inland navigation (by using existing services and information tools).

The second specified target group especially involves stakeholders such as **cargo owners, industry or wholesalers**. Cargo owners suffer from a lack of information on the inland navigation sector and also from the lack of skilled staff with specific know-how on the integration of Danube logistics services in their supply chains. For a successful promotion and implementation of Danube navigation into their transport logistics solutions, a comprehensive consideration of the needs of cargo owners is therefore essential.

The pre-identification of possible interview partners and market operators was carried out in the month April by each project partner. Each project partner had to define at minimum five potential interview partners. After conducting the face-to-face interviews in the months April to September, in total 33 interviews were transmitted into the online tool. 24 interviews were conducted with Danube logistics service providers and 9 interviews were conducted with cargo owners. The number of the conducted interviews in each target group and per country is summarized in the following table.

Country (project partner)	Logistics service providers	Cargo owners	Interviews per country
Germany (DST)	4	0	4
Austria (VIA & FHOO)	4	2	6
Slovakia (ARVD)	1	0	1
Hungary (RSOE)	3	0	3
Croatia (CRUP)	1	0	1
Serbia (PGA)	2	3	5
Romania (CER & UPIR)	5	1	6
Bulgaria (UT)	4	3	7
TOTAL	24	9	33

4. COLLECTION OF NEEDS OF (POTENTIAL) USERS OF DANUBE NAVIGATION FOR INFORMATION, SERVICES AND TOOLS

4.1. Results of the online survey – Danube Logistics Service Providers

In total, 24 interviews with Danube logistics service providers were carried out. The key statements of the interview results are summarized in the subsequent section.

The sources of the interview partners in getting information in the area of inland waterway transport are manifold and range from in-house experience, different kind of associations to public organisations. Most of the logistics service providers have a contact person in IWT-related organisations (see Figure 1). Nevertheless, the respondents request for better and more up-to-date information to cope with future challenges in IWT more easily. In particular, the information related to IWT is needed on a daily basis, it was for example indicated that the “information on the eastern Danube is often of low quality”. These results show clearly that there is a high demand for improved and up-to-date information flows, especially in the Lower Danube regions. This shortcoming can be eliminated with the establishment of one-stop-shops in each Danube country.

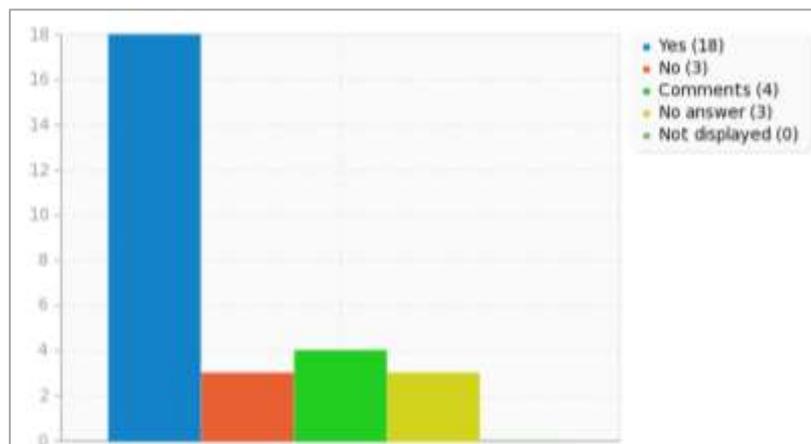


Figure 1: Results to question “Do you have a contact person in this organisations concerning inland waterway transport?”

The following table summarizes the findings of getting information via different kind of media and of different topics listed in the table and also provides an overview about the current quality of the information services (multiple answers were possible).

	😊😊	😊	😐	😞	😞😞	no answer	sum of answers	Comments
Internal Know-How	10 (55.6%)	3 (16.7%)	2 (11.1%)	3 (16.7%)	0 (0.0%)	6 (25.0%)	18 (100.0%)	Internal know-how is on high level
Personal contact	9 (50.0%)	1 (5.6%)	5 (27.8%)	3 (16.7%)	0 (0.0%)	6 (25.0%)	18 (100.0%)	Personal contact is frequently used and established
External websites	5 (31.3%)	5 (31.3%)	5 (31.3%)	1 (6.3%)	0 (0.0%)	8 (33.3%)	16 (100.0%)	Average usage of external websites, average-positive feedback (lot of n.a.)
Inquiries via phone	4 (25.0%)	4 (25.0%)	5 (31.2%)	3 (18.8%)	0 (0.0%)	8 (33.3%)	16 (100.0%)	Few inquiries via phone, poor feedback
Inquiries via mail	6 (31.6%)	7 (36.8%)	5 (26.3%)	1 (5.3%)	0 (0.0%)	5 (20.8%)	19 (100.0%)	Comp. to phone more and better inquires via mail
Mailing services	2 (16.7%)	2 (16.7%)	1 (8.3%)	1 (8.3%)	6 (50.0%)	12 (50.0%)	12 (100.0%)	Mailing services are not used, average-low quality, 50% no answer.
Print media (flyers, manuals,...)	3 (23.1%)	2 (15.4%)	2 (15.4%)	3 (23.1%)	3 (23.1%)	11 (45.8%)	13 (100.0%)	Print media are not intensively used, average to low quality, 45% no answer.

The results for each thematic block are described and concluded in following section.

1. Fairway information

There is a very high demand on current, up-to-date and reliable information about fairway conditions such as water levels or traffic related data (NtS or bridge clearances). Some countries or project partners (= designated one-stop-shops) do not offer fairway information directly on the spot, are only available in a decentralized way or provided in low quality (not up-to-date, incomplete, etc.). Since the demand for fairway information is extremely high and is needed on a daily basis by transport companies, a centralized information contact point or centrally managed website/information source is highly recommended. Some countries already offer centrally managed websites with fairway information such as PannonRis, DoRIS, RIS by CRUP or the Danube FIS Portal. Another shortcoming is the low availability of English-based information platforms and websites (such as no linking on the national websites to the FIS Portal).

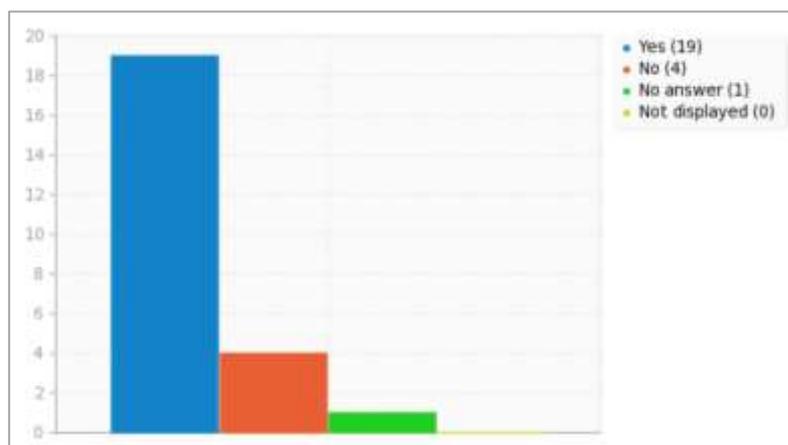


Figure 2: Results to question "Does your company/institution/organisation require information on Danube Fairway?"

2. Ports & terminals

Most logistics service providers request for a uniform database which contains information (among others) about Danube ports, infrastructure of ports, details of contact persons and port handling and storage facilities. Currently, there are only few websites or information sources available which provide data about ports and terminals in native languages for each country, and even less websites are available in English language. In some cases, the information sources are spread among several organizations or websites. This gap can be solved e.g. by using the Danube Ports platform, operated by viadonau, that provides free-of-charge information about ports and terminals located in all Danube countries in English language.

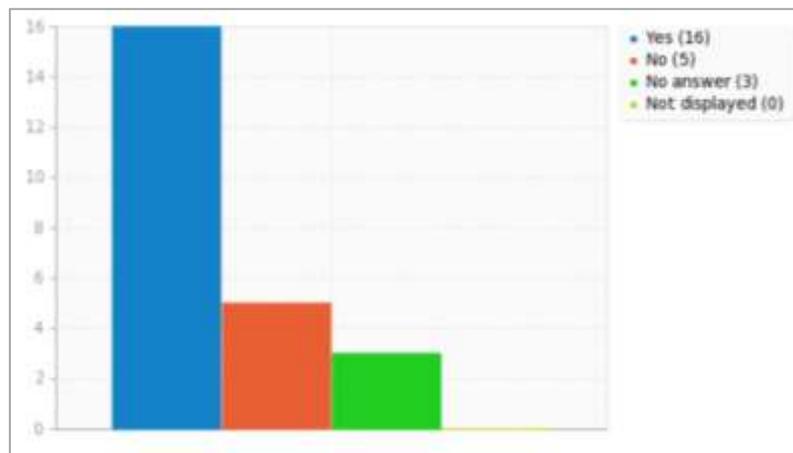


Figure 3: Results to question "Does your company/institution/organisation require information on Danube ports?"

3. Transport companies

The interview partners expressed a high need on up-to-date and easily available information about shipping and forwarding companies (Figure 4). A major gap is determined in this thematic block, as almost no project partner (=designated one-stop-shop) or country currently provides contact details of forwarding companies or information of transported cargo or served ports. At the moment, only Romania offers contact details of forwarding companies on request as well Austria (viadonau) operates the Blue Pages platform, which offers comprehensive information on forwarding companies of all Danube countries in English language.

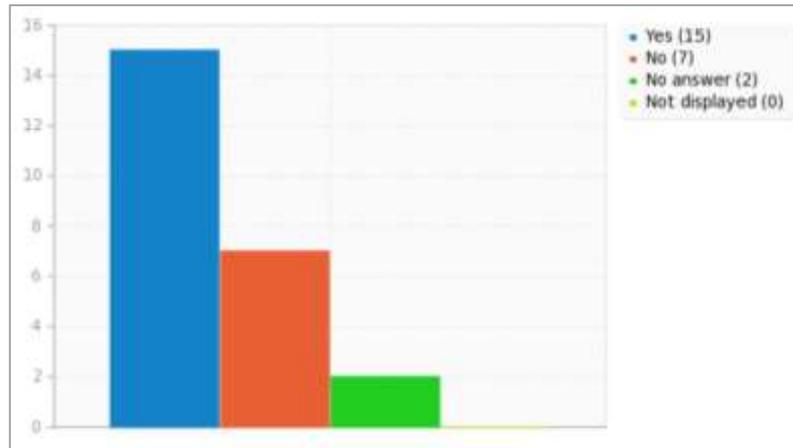


Figure 4: Results to question "Does your company/institution/organisation require information on shipping and forwarding companies?"

4. Funding schemes

Another major gap was identified in the area about advice of funding schemes: Austria and Romania are the only countries which offer information and supporting services relating to funding schemes (via their websites). In general, information on funding schemes should be provided in native and in English languages and should be easily available as most of the interview partners desire for professional advice concerning funding schemes (Figure 5). The most demanded topics are about providing information on calls for proposals, national and international funding schemes. This gap can be easily closed by providing information which is already available via transnational EIBIP (European Inland Barging Innovation Platform) funding database.

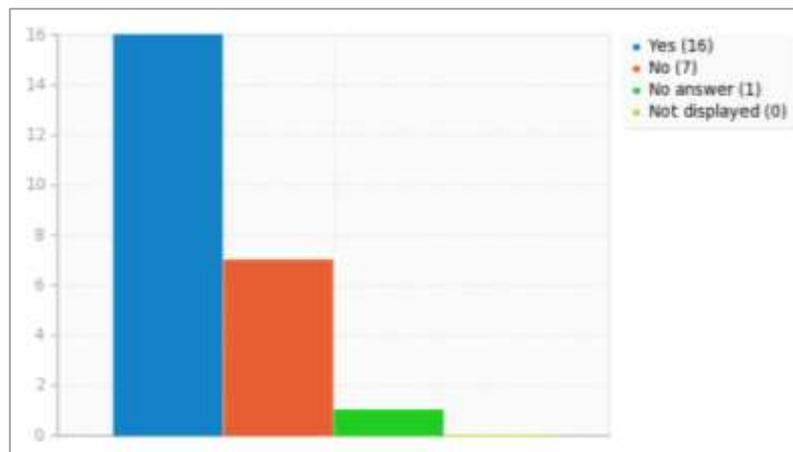


Figure 5: Results to question "Does your company/institution/organisation require information on FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.) relevant for Danube logistics?"

5. Market opportunities

About three quarters of the interview partners have expressed their need in market analysis in the Danube logistics in order to identify potential business partners/customers of the logistics services (Figure 6). At the moment, there are only two countries (Austria & Romania) which offer market analysis via their websites; all other countries respectively project partners do not publish market analysis yet. Ideally, this shortcoming is to be overcome by establishing the

designated one-stop-shops that should include analysis of promoting markets for IWT in their service portfolio.

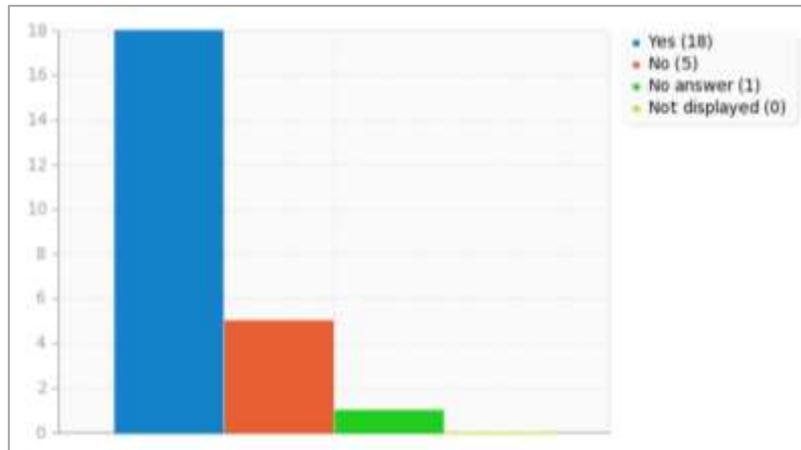


Figure 6: Results to question "Does your company/institution/organisation require information on promising markets for Danube logistics?"

6. Danube navigation promotion

A vast majority of the interviewed partner show high interest in general information on Danube navigation and Danube logistics (Figure 7). Although there are already several websites, publications, information platforms or events that promote the Danube navigation in the entire Danube region, some of the websites are not up-to-date or insufficiently maintained. Thus, and due to high expressed need, major efforts are required to provide reasonable promotion material for Danube navigation.

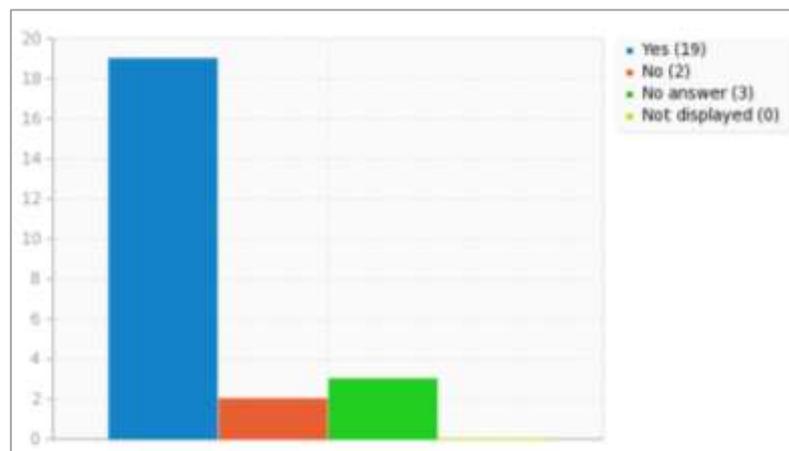


Figure 7: Results to question "Does your company/institution/organisation require general information on Danube navigation and Danube logistics on national/ international level?"

7. Human resources development (education & training)

Some interview partners claimed improved training materials and better developed education institutions to increase the quality of human resources development.

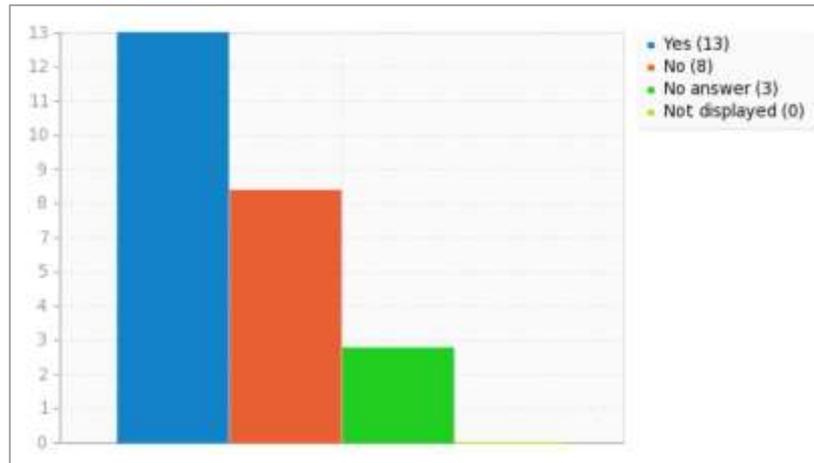


Figure 8: Results to question "Does your company/institution/organisation require information on human resources development?"

In general, a substantial majority of respondents will use the information services on a daily basis if the quality level of provided information is improved significantly. The respondents (Danube Logistics Service providers) expect from public organisations as new one-stop-shops following services (in order of significance, see also Figure 9):

- Personal information exchange on inland navigation (free of charge, events & workshops) for home country and entire Danube region
- Free of charge bundled digital information material
- Providing access to international inland navigation expert network (e.g. contact to authorities, information on national/EU projects, working groups, legal framework, etc.)
- Free of charge bundled printed information material
- Personal information exchange on inland navigation via bilateral meetings (free of charge)
- Personal information exchange on inland navigation via in-house advising (training, free of charge)

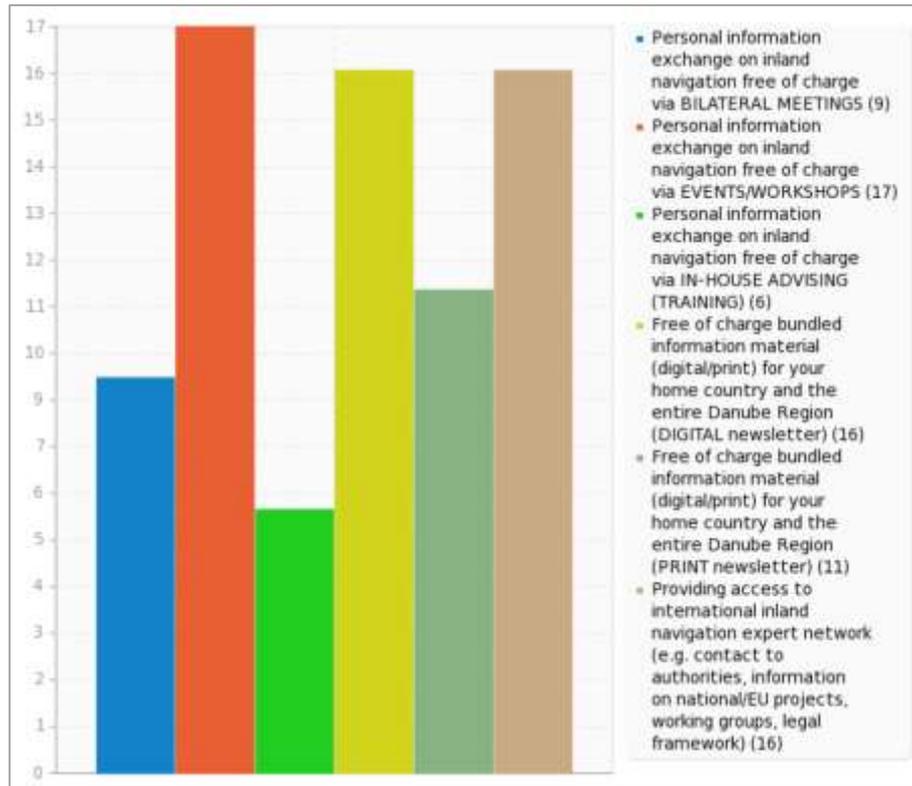


Figure 9: Results to question "What do you expect from public organisations in charge for the promotion (=one-stop-shop) of inland navigation in your country?" (Multiple answers possible)

4.2. Results of the online survey – Cargo Owners

In total, 9 interviews with cargo owners were carried out. The key statements of the interview results are summarized in the subsequent section.

The majority of the interviewed cargo owners are producing respectively selling their goods on regional, national and EU level. 70% percent of the interviewed cargo owners are currently using inland waterway transport (see Figure 10). The reasons for using inland waterway transport are manifold, including the cost factor (low costs), the cargo type (which are well-suited for IWT such as grain, oilseeds or pellets) and suitable locations along the Danube. Nevertheless the main transport for the daily business is carried out on road (next to rail and inland navigation). The core transported cargo type in inland navigation constitutes clearly the dry bulk cargo.

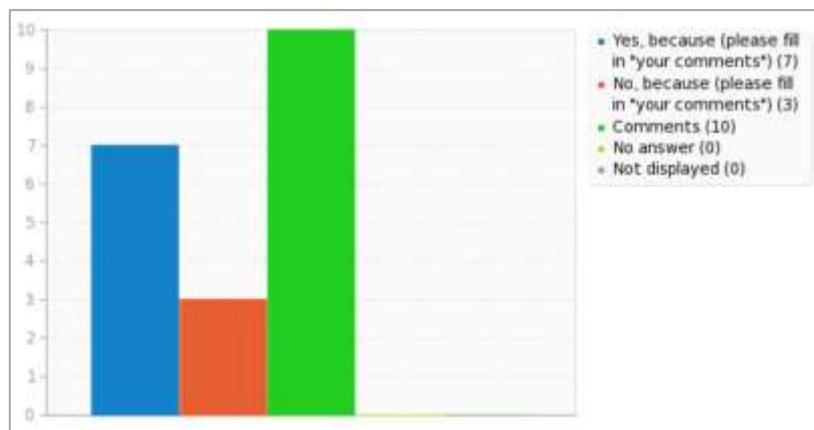


Figure 10: Results to question “Is your company/institution/organisation currently using inland waterway transport?”

Cargo owners mostly consult the chamber of commerce or the ministry of transport as information sources about inland navigation. Further information sources are in-house expertise as well as the transport companies and forwarders themselves. In general, the interviewed cargo owners believe in a positive development of inland waterway transport in future, nevertheless great efforts in the infrastructure along the Danube are essential (improvements, modernization, etc.).

Most likely cargo owners require information on shipping and on forwarding companies (including contact data, fleet, served areas, etc.). Further it was indicated that information on waterway infrastructure (fairway information, lock status, etc.), information on Danube ports (contacts, infrastructure, handling facilities, etc.) as well as B2B possibilities are strongly demanded and needed on daily basis. This shortcoming can be resolved with the establishment of one-stop-shops in each Danube country.

The following table summarizes the findings of getting information via different kind of media and of different topics listed in the table and also provides also an overview about the current quality of the information services (multiple answers were possible).

	😊😊	😊	😐	😞	😞😞	no answer	sum of answers	Comments
Internal Know-How	2 (33.3%)	0 (0.0%)	2 (33.3%)	1 (16.7%)	1 (16.7%)	4 (40.0%)	6 (100.0%)	Internal know-how is on average level
Personal contact	1 (14.3%)	4 (57.1%)	2 (28.6%)	0 (0.0%)	0 (0.0%)	3 (30.0%)	7 (100.0%)	Personal contact is used, satisfactory quality
External websites	1 (14.3%)	2 (28.6%)	2 (28.6%)	1 (14.3%)	1 (14.3%)	3 (30.0%)	7 (100.0%)	Average usage of external websites, neutral feedback
Inquiries via phone	2 (33.3%)	2 (33.3%)	2 (33.3%)	0 (0.0%)	0 (0.0%)	4 (40.0%)	6 (100.0%)	Several inquiries via phone, quite good feedback
Inquiries via mail	1 (14.3%)	2 (28.6%)	4 (57.1%)	0 (0.0%)	0 (0.0%)	3 (30.0%)	7 (100.0%)	Several inquiries via mail, quality low
Mailing services	1 (20.0%)	0 (0.0%)	3 (60.0%)	0 (0.0%)	1 (20.0%)	5 (50.0%)	5 (100.0%)	Mailing services are rarely used, average quality
Print media (flyers, manuals,...)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (20.0%)	4 (80.0%)	5 (50.0%)	5 (100.0%)	Print media are not used, very poor quality

The results for each thematic block are described and concluded in following section.

1. Fairway information

Some countries or project partners (= designated one-stop-shops) do not offer fairway information directly on the spot, are only available in a decentralized way or are provided in low quality (not up-to-date, incomplete, etc.). Figure 11 underlines the demand of some interviewed cargo owners for fairway information. Thus centralized information contact points or centrally managed websites are highly recommended. Cargo owners are interested in fairway information in order to gain a sound logistics planning basis, for example low water levels might be crucial when planning time critical transports. Up-to-date water level data are also a very essential parameter for limitations of transported cargo volumes which also affects the business of cargo owners. Due to these reasons, the interviewed cargo owners expressed a need on current, up-to-date and reliable information about fairway conditions such as water levels or traffic related data (lock status etc.).

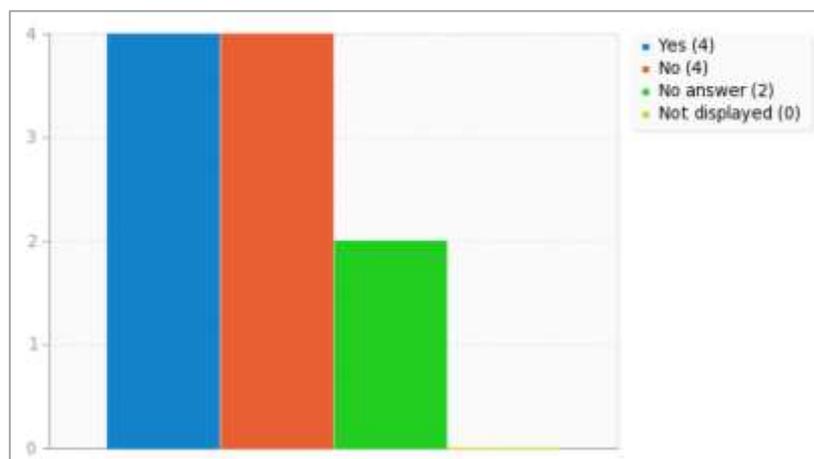


Figure 11: Results to question "Does your company/institution/organisation require information on Danube Fairway?"

2. Ports & terminals

Currently, there are only few websites or information sources available which provide data about ports and terminals in native languages for each country, and even less websites are available in English language. However, cargo owners expressed a high demand on freely available as well as up-to-date information about free or unused capacities/docks in ports/terminals in order to reduce cargo transport travel times. Possible risks (such as delays) for time-crucial transports will be reduced and the efficiency of transport planning as well as of the operation of ports and terminals will increase. Half of the interviewed cargo owners request for a uniform database that contains information about details of contact persons, port handling and storage facilities (Figure 12).

The latter gap can be resolved e.g. by using the Danube Ports platform, operated by viadonau, that provides information about ports and terminals located in all Danube countries in English language.

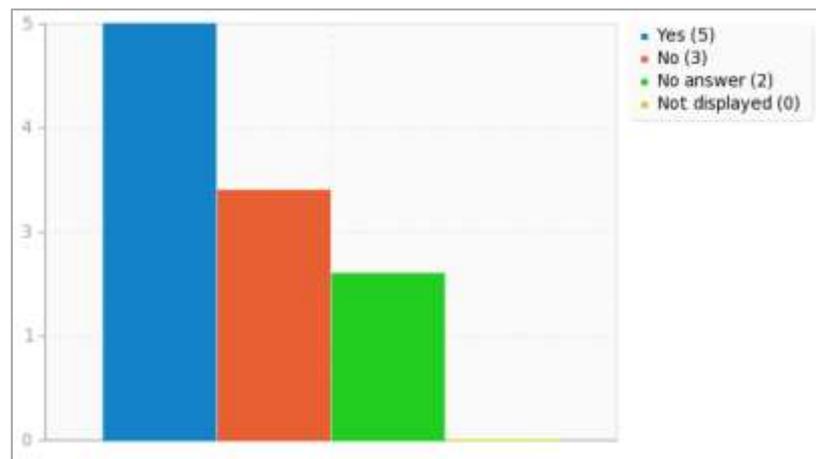


Figure 12: Results to question "Does your company/institution/organisation require information on Danube ports?"

3. Transport companies

The interviewed cargo owners appreciate a low threshold access to the Danube logistics network for easy networking and connecting with potential shipping and forwarding companies. The status quo shows a major gap in this thematic block, as almost no project partner or designated one-stop-shop currently provides contact details of forwarding companies or information of transported cargo or served ports. A standardized database/directory, such as "The Blue Pages", filled in with contact data from forwarding companies will support cargo owners in finding their shipping partner for cargo transports in the entire Danube region.

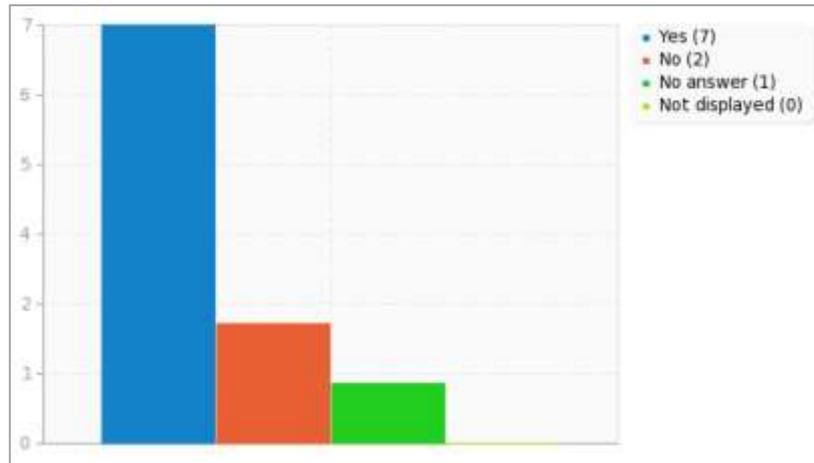


Figure 13: Results to question "Does your company/institution/organisation require information on shipping and forwarding companies?"

4. Funding schemes

Promoting the possible funding schemes to a broad public (e.g. via websites such as in Austria or Romania) will foster much needed investments in infrastructure of Danube inland waterway transport, although the demand of cargo owners for advice of funding schemes is low. Nevertheless, cargo owners and Danube logistics service providers will definitely benefit from improved infrastructure conditions (modal shift). The most demanded topics are about providing information on calls for proposals, national and international funding schemes.

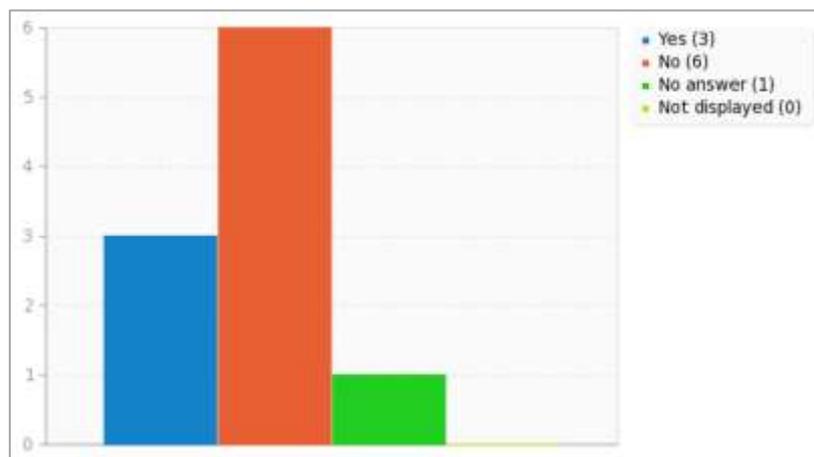


Figure 14: Results to question "Does your company/institution/organisation require information on FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.) relevant for Danube logistics?"

5. Market opportunities

Cargo owners show interest in up-to-date analysis of markets segments in the Danube region (Figure 15). Market analyses are a very useful tool for cargo owners as well as for Danube logistics service providers to recruit potential customers/clients in an efficient and targeted manner. At the moment, there are only two countries which offer market analysis via their websites; all other countries respectively project partners do not publish any market analysis. The development of market analysis in Danube logistics will be a core task of future one-stop-shops to minimize this gap.

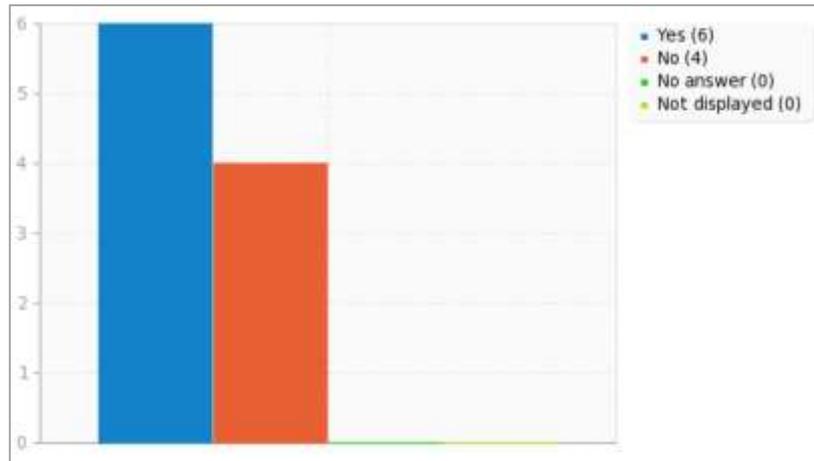


Figure 15: Results to question "Does your company/institution/organisation require information on promising markets for Danube logistics?"

6. Danube navigation promotion

At present, cargo owner rarely consider transports by Danube inland waterway in their multimodal logistics chains and there is a low awareness of Danube navigation. A promotion of Danube navigation will lead to a higher integration and acceptance of inland navigation into the logistics chains and will increase the level of potential clients for Danube navigation. Although there are several websites, publications, information platforms or events that promote the Danube navigation in the entire Danube region, some of the websites are not up-to-date or insufficiently maintained. Thus, and due to high expressed need by the interviews partners, major efforts are required to provide reasonable promotion material for Danube navigation.

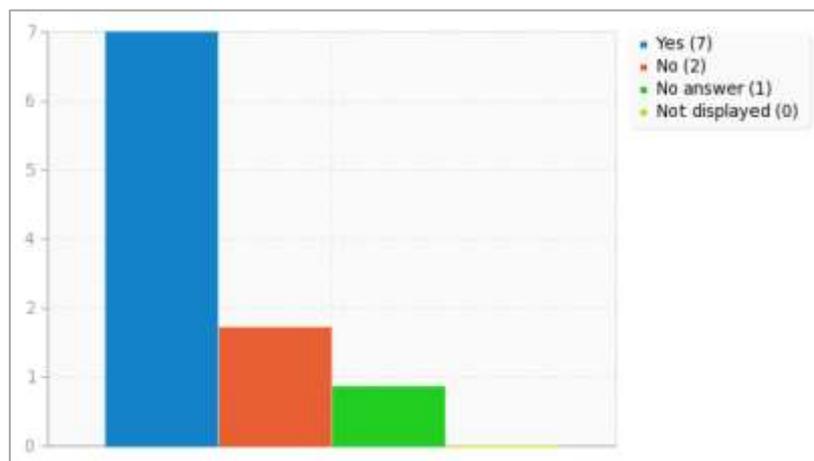


Figure 16: Results to question "Does your company/institution/organisation require general information on Danube navigation and Danube logistics on national/ international level?"

7. Human resources development (education & training)

Some interview partners claimed improved training materials and better developed education institutions to increase the quality of human resources development (Figure 17).

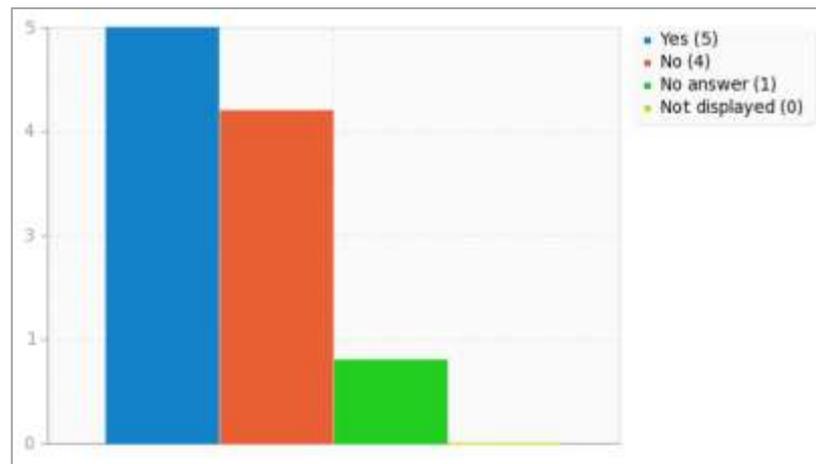


Figure 17: Results to question "Does your company/institution/organisation require information on human resources development?"

The summarized interview results show clearly that a high demand of one-stop-shops and promotions centres for inland navigation is given. Especially the quality and the usage of information channels are on quite low level. An improved and up-to-date information supply will support a greater usage and acceptance of the inland waterway navigation.

In general, a substantial majority of respondents will use the information services on a daily basis if the quality level is improved significantly. The most demanded information topics and services are related to Danube ports, shipping and forwarding companies, general information on Danube navigation and Danube logistics.

The interviewed cargo owners may benefit from time savings and new market developments if the availability of information is improved and updated in their home country languages. Further, the cargo owners expect from one-stop-shops a personal information exchange on inland navigation free of charge and access to international navigation expert networks.

The cargo owners expect from public organisations as new one-stop-shops following services (in order of significance, see also Figure 18):

- Personal information exchange on inland navigation (free of charge, events & workshops) for home country and entire Danube region
- Providing access to international inland navigation expert network (e.g. contact to authorities, information on national/EU projects, working groups, legal framework, etc.)
- Free of charge bundled digital information material
- Personal information exchange on inland navigation via bilateral meetings (free of charge)
- Free of charge bundled printed information material
- Personal information exchange on inland navigation via in-house advising (training, free of charge)

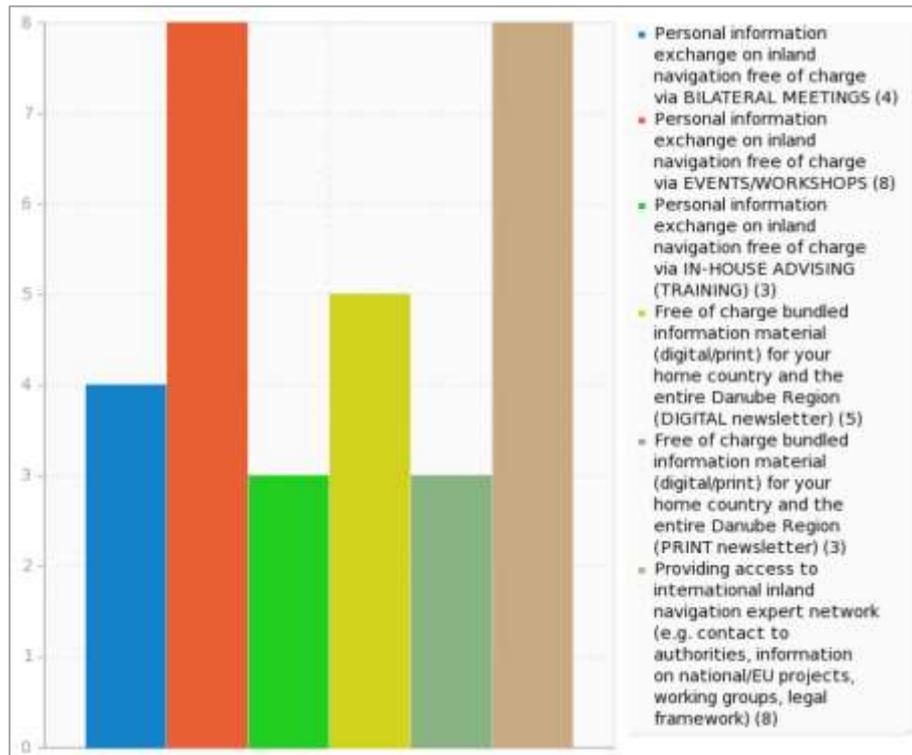


Figure 18: Results to question "What do you expect from public organisations in charge for the promotion (=one-stop-shop) of inland navigation in your country?" (Multiple answers possible)

5. TRANSNATIONAL CONCLUSIONS

The gap analysis carried out in this report forms a solid basis to develop an efficient and customer oriented information, service and tool portfolio (= one-stop-shops) in terms of Danube navigation.

One main goal is to develop a country-specific one-stop-shop that collects all relevant information of Danube navigation, meaning that there is one contact point per country. The development of such one-stop-shops according to the needs (as surveyed in the interviews) concerning inland waterway navigation requires transnational knowledge and competences in order to enable information exchange and to reach a broad market response.

The main focus of required information and services for cargo owner is on transport capacities, freely available contact details of service providers and data about served ports and routes. The surveyed demand of Danube logistics service providers lies elsewhere, namely in fairway related information (water levels, etc.) and in information about promising market segments.

The demand analysis showed that there is a wide range of different present gaps in information services which can be only resolved by implementing of one-stop-shops in every country. The evaluation of the demand has turned out to be an essential step towards a joint standard of Danube navigation promotion.

6. ANNEXES

6.1. Template of Survey: Demand of Logistics Service Providers for information/tools/services related to Danube navigation

Due to data protection and explicit wishes from the interview partners, only a blank version of the interview template is attached.

Project website: www.interreg-danube.eu/danube-skills



Increased institutional capacity in Danube navigation by boosting joint transnational competences and skills in education and public development services



Survey: Demand of **Logistics Service Providers** for information/tools/services related to Danube navigation

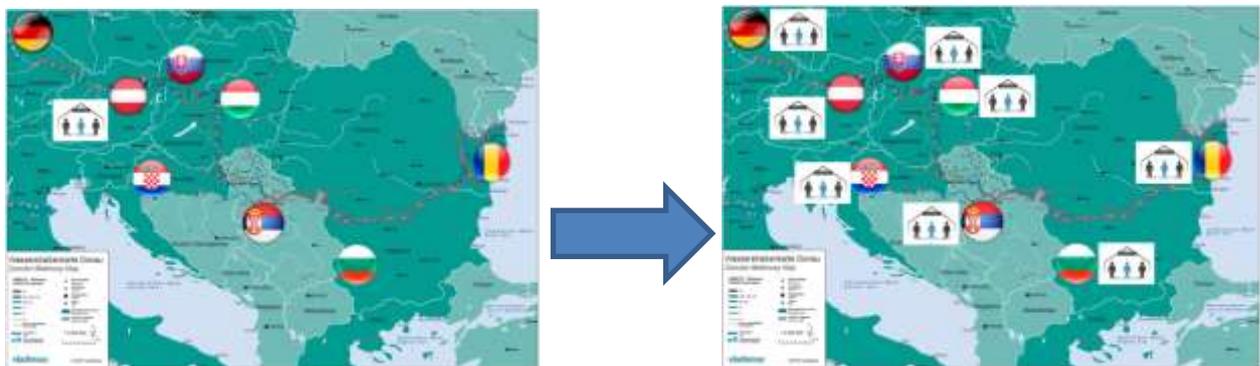
Danube SKILLS – background of the survey

Current challenges: The **integration of Danube navigation into transport logistics solutions** is currently often prevented by the lack of skilled manpower as well as **lack of information in the inland waterway transport sector for companies (cargo owners)**. The challenges identified in Danube navigation clarifies the huge discrepancy between inland waterway transport on the Rhine and on the Danube and reinforce the **necessity to increase the know-how** of responsible administrations for being capable of providing improved information & promotion services to the commercial transport and logistics market operators.

Objectives: The principal objective is to **increase transnational knowledge in inland navigation** by creating a **‘user oriented’ service portfolio** that covers up the whole Danube region. One main goal is to **develop a country-specific one-stop-shop** that collects all relevant information of Danube navigation, meaning that there is one contact point per country. The development of such one-stop-shops according to the needs concerning inland waterway navigation requires transnational knowledge and competences in order to enable information exchange and to reach a broad market response.

This evaluation and survey: The evaluation of demand for information in Danube navigation will be performed in order to receive feedback from market operators (here: Industry, Cargo owners, Freight forwarders) about the required information in order to increase transnational knowledge in inland navigation by using or developing existing services and (information-)tools.

The following **questionnaire contains questions** regarding fairway information, ports & terminals, transport companies, funding schemes, market opportunities, the promotion of Inland Waterway Transport as well as human resources (education & training).



Questionnaire:

Demand on information/tools/services related to Danube navigation of

Logistics service provider (shipping companies and ship brokers)

Name of project partner

(The personal information which you provide on these questionnaire will be stored securely and confidentially and will not be supplied to any party outside of the project. The data you provide will be treated confidentially and entirely anonymous with all personally identifying information having been removed.)

1. Information on company:

Name of company:

Name and position of interview partner

E-mail:

Does your company have more than one location?

Yes, in the following countries:

No

Which regions/countries are served by your company?

2. Logistics in your company

Which goods are predominantly transported by your company?

.....

Do you also transport goods classified as dangerous goods?

Yes No

Do you have a contact person in this organisations concerning inland waterway transport?

- Yes No

IMPORTANCE OF INLAND WATERWAY TRANSPORT

What do you think about the development of inland waterway transport in the future? (in keywords)

Which challenges do you see for inland waterway transport in the future? (in keywords)

3. Current use of information on Danube logistics

Which information do you use in order to include IWT in the company logistics

(Mark with a cross where applicable. Multiple answers possible!)

- Waterway infrastructure (fairway information, lock status, etc.)
- Information on Danube ports & terminals (contacts, infrastructure, handling facilities, etc.)
- Information on shipping & forwarding companies (contacts, fleet, served areas, etc.)
- Financial support (e.g. national & international funding schemes)
- Information on promising markets of inland navigation
- B2B possibilities
- General of information of inland navigation
- other:

How often do you use/need information concerning inland waterway transportation?

.....

Does your company have access to materials/information on the topics named above?

Yes

No

What type of media does your company use to get information about inland waterway transport? Please specify and describe the quality (actuality, form, availability) for the information you are currently using.

		excellent quality			bad quality	
		1	2	3	4	5
<input type="checkbox"/>	Internal Know-How	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via personal contact at external organisation/company	<input type="checkbox"/>				
<input type="checkbox"/>	External websites.....	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via telephone	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via mail	<input type="checkbox"/>				
<input type="checkbox"/>	Mailing services:.....	<input type="checkbox"/>				
<input type="checkbox"/>	Print media (manuals, flyers, brochures)	<input type="checkbox"/>				

If the QUALITY of information concerning inland waterway transportation would be better as you marked above, how often would you use it?

.....

4. Demand for information on Danube logistics

a. Does your company/institution/organisation require information on the DANUBE FAIRWAY?

Yes

No

Danube navigation of cargo owners

If yes, please give a quick overview which information you need on the DANUBE FAIRWAY (water levels, traffic related data, actual fairway depths, locks status, bridges clearance, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

b. Does your company/institution/organisation require Information on DANUBE PORTS?

Yes

No

If yes, please give a quick overview which information do you need on DANUBE PORTS (e.g. infrastructure of ports, contact persons of logistics service providers, port handling & storage facilities, e.g.) with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

c. Does your company/institution/organisation require Information on SHIPPING and FORWARDING COMPANIES?

Yes

No

If yes, please give a quick overview which information do you need on SHIPPING and FORWARDING COMPANIES? (e.g. contact details, transported cargo, served ports, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

Demand for information/tools/services related to

Danube navigation of cargo owners

d. Does your company/institution/organisation require information on FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.) relevant for Danube logistics?

Yes

No

If yes, please give a quick overview which information do you need and to what extent on national/international FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.)

Information required	Geographical coverage (select): regional / Danube corridor / international

e. Does your company/institution/organisation require information on PROMISING MARKETS for Danube logistics?

Yes

No

If yes, please give a quick overview which information do you need on PROMISING MARKETS (e.g. market analysis, events with thematic focuses on specific cargo groups, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

f. Does your company/institution/organisation require GENERAL INFORMATION ON THE DANUBE NAVIGATION AND DANUBE LOGISTICS on national/ international level?

Yes

No

Demand for information/tools/services related to

Danube navigation of cargo owners

If yes, please give a quick overview which **GENERAL INFORMATION ON THE DANUBE NAVIGATION and DANUBE LOGISTICS** do you need (logistics advantages, transport capacities, suitability for specific cargo types etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

g. Does your company/institution/organisation require Information on HUMAN RESOURCES DEVELOPMENT?

Yes

No

If yes, please give a quick overview which information you need about **HUMAN RESOURCES DEVELOPMENT** (e.g. training materials, educational institutions etc.), and with which geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

If all the necessary and needed information are available, updated and in your languages, what benefits for you/potential for improvement for your own logistic processes do you see?

.....
.....

What do you expect from public organisations in charge for the promotion (=one-stop-shop) of inland navigation in your country?

<input type="checkbox"/>	Personal information exchange on inland navigation free of charge via	<input type="checkbox"/> Bilateral meetings <input type="checkbox"/> Events/Workshops <input type="checkbox"/> In-house advising (Training)
<input type="checkbox"/>	Free of charge bundled information material (digital/print) for your home country and the entire Danube Region	
<input type="checkbox"/>	Providing access to international inland navigation expert network (e.g. contact to authorities, information on national/EU projects, working groups, legal framework)	
	Other:.....	
	Other:	
	Other:	
	Other:	

Project website: www.interreg-danube.eu/danube-skills

Demand for information/tools/services related to
Danube navigation of cargo owners

6.2. Template of Survey: Demand of Cargo Owners for information/tools/services related to Danube navigation

Due to data protection and explicit wishes from the interview partners, only a blank version of the interview template is attached.



Increased institutional capacity in Danube navigation by boosting joint transnational competences and skills in education and public development services



Survey: Demand of **cargo owners** for information/tools/services related to Danube navigation

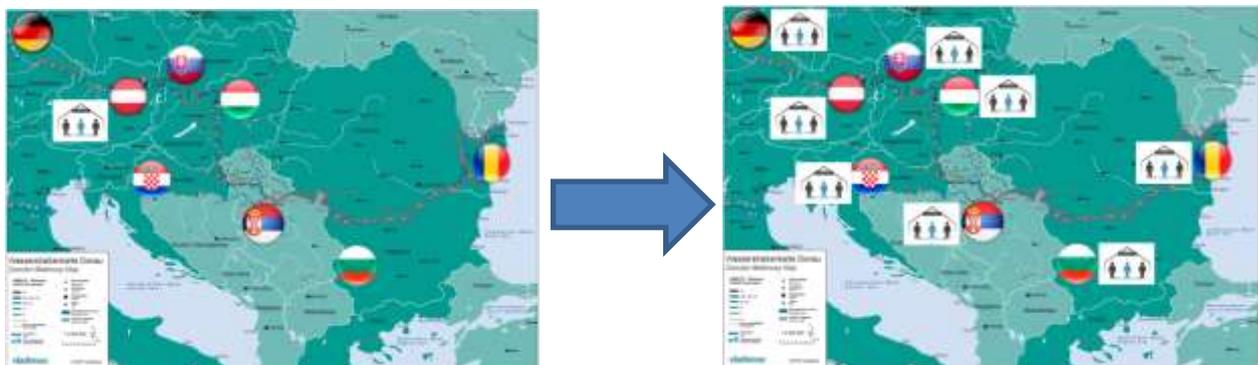
Danube SKILLS– background of the survey

Current challenges: The **integration of Danube navigation into transport logistics solutions** is currently often prevented by the lack of skilled manpower as well as **lack of information in the inland waterway transport sector for companies (cargo owners)**. The challenges identified in Danube navigation clarifies the huge discrepancy between inland waterway transport on the Rhine and on the Danube and reinforce the **necessity to increase the know-how** of responsible administrations for being capable of providing improved information & promotion services to the commercial transport and logistics market operators.

Objectives: The principal objective is to **increase transnational knowledge in inland navigation** by creating a **‘user oriented’ service portfolio** that covers up the whole Danube region. One main goal is to **develop a country-specific one-stop-shop** that collects all relevant information of Danube navigation, meaning that there is one contact point per country. The development of such one-stop-shops according to the needs concerning inland waterway navigation requires transnational knowledge and competences in order to enable information exchange and to reach a broad market response.

This evaluation and survey: The evaluation of demand for information in Danube navigation will be performed in order to receive feedback from market operators (here: Industry, Cargo owners, Freight forwarders) about the required information in order to increase transnational knowledge in inland navigation by using or developing existing services and (information-)tools.

The following **questionnaire contains questions** regarding fairway information, ports & terminals, transport companies, funding schemes, market opportunities, the promotion of Inland Waterway Transport as well as human resources (education & training).



Questionnaire:

Demand of

Cargo owners (industry, wholesalers)

for information/tools/services related to Danube navigation

Name of project partner

(The personal information which you provide on this questionnaire will be stored securely and confidentially and will not be supplied to any party outside of the project. The data you provide will be treated confidentially and entirely anonymous with all personally identifying information having been removed.)

1. Information on company:

Name of company:

Name and position of interview partner

E-mail:

Does your company have more than one location?

Yes, in the following countries:

No

Annual trade volume:

**Is your company producing or selling goods on a regional, national and/or international level?
(Multiple answers possible!)**

Regional and national Danube corridor EU Worldwide

Specify:

2. Logistics in your company

Is your company/institution/organisation currently using inland waterway transport?

Yes, because.....

No, because.....

Which means of transport are relevant for your daily business and why? (rail/road/inland navigation/maritime)

.....

Which goods are predominantly transported (by all means of transport)?

.....

Are the products transported as dry bulk/liquid bulk/ break bulk/other:

.....

How time-critical are the transports/products in most cases:

.....

Do you also transport goods classified as dangerous goods:

.....

If IWT is integrated in logistics process:

Which are your sources of information in the area of inland waterway transport (e.g. Chamber of Commerce, Associations, public organisations on IWT)?

.....

Do you have experts support in these organisations concerning inland waterway transport?

Yes

No

What do you think about the development of inland waterway transport in the future? (in keywords)

3. Current use of information on Danube logistics

How often do you use information concerning inland waterway transportation?
.....

Which information do you use in order to include IWT in the company logistics

(Please, mark with a cross where applicable. Multiple answers possible!)

- Waterway infrastructure (fairway information, lock status, etc.)
- Information on Danube ports & terminals (contacts, infrastructure, handling facilities, etc.)
- Information on shipping & forwarding companies (contacts, fleet, served areas, etc.)
- Financial support (e.g. national & international funding schemes)
- Information on promising markets of inland navigation
- B2B possibilities
- General information on inland navigation
- other:

Does your company have access to materials/information on the topics named above?

- Yes
- No

What type of media does your company use to get information about the topics named above?
Please specify and describe the quality (actuality, form, availability) for the information you are currently using.

		excellent quality			bad quality	
		1	2	3	4	5
<input type="checkbox"/>	Internal Know-How	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via personal contact at external organisation/company	<input type="checkbox"/>				
<input type="checkbox"/>	External websites.....	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via telephone	<input type="checkbox"/>				
<input type="checkbox"/>	Inquiries via mail	<input type="checkbox"/>				
<input type="checkbox"/>	Mailing services:.....	<input type="checkbox"/>				
<input type="checkbox"/>	Print media (manuals, flyers, brochures)	<input type="checkbox"/>				

If the **QUALITY** of information concerning inland waterway transportation would be better as you marked above, how often would you use it?

.....

4. Demand for information on Danube logistics

a. Does your company/institution/organisation require information on the DANUBE FAIRWAY?

- Yes No

If yes, please give a quick overview which information you need on the DANUBE FAIRWAY (water levels, traffic related data, actual fairway depths, lock status, bridge clearance, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

b. Does your company/institution/organisation require Information on DANUBE PORTS?

- Yes No

If yes, please give a quick overview which information you need on DANUBE PORTS (infrastructure in ports, contact persons of logistics service providers, port handling & storage facilities, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

Danube navigation of cargo owners

c. Does your company/institution/organisation require information on SHIPPING and FORWARDING COMPANIES?

- Yes No

If yes, please give a quick overview which information you need on SHIPPING and FORWARDING COMPANIES? (contact details, transported cargo, served ports, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

d. Does your company/institution/organisation require information on FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.) relevant for Danube logistics?

- Yes No

If yes, please give a quick overview which information you need on national/international FUNDING SCHEMES (calls for proposal, fact sheets, contact details, etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

e. Does your company/institution/organisation require information on PROMISING MARKETS for Danube logistics?

- Yes No

If yes, please give a quick overview which information you need on **PROMISING MARKETS** (e.g. market analysis, events with thematic focuses on specific cargo groups, etc.), and with which geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

f. Does your company/institution/organisation require **GENERAL INFORMATION on DANUBE NAVIGATION and DANUBE LOGISTICS on national/ international level?**

Yes

No

If yes, please give a quick overview which **GENERAL INFORMATION ON THE DANUBE NAVIGATION and DANUBE LOGISTICS** you need (logistics advantages, transport capacities, suitability for specific cargo types etc.), with geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

g. Does your company/institution/organisation require **Information on HUMAN RESOURCES DEVELOPMENT?**

Yes

No

Demand for information/tools/services related to

Danube navigation of cargo owners

If yes, please give a quick overview which information you need about HUMAN RESOURCES DEVELOPMENT (e.g. training materials, educational institutions etc.), and with which geographical coverage (regional, Danube corridor, international):

Information required	Geographical coverage (select): regional / Danube corridor / international

If all the necessary and needed information are available, updated and in your languages, what benefits and potential for improvement for your logistics processes do you see?

.....

.....

What do you expect from public organisations in charge for the promotion (=one-stop-shop) of inland navigation in your country?

<input type="checkbox"/>	Personal information exchange on inland navigation free of charge via	<input type="checkbox"/> Bilateral meetings <input type="checkbox"/> Events/Workshops <input type="checkbox"/> In-house advising (Training)
<input type="checkbox"/>	Free of charge bundled information material (digital/print) for your home country and the entire Danube Region	Digital (newsletter) Print (newsletter)
<input type="checkbox"/>	Providing access to international inland navigation expert network (e.g. contact to authorities, information on national/EU projects, working groups, legal framework)	
	Other:.....	
	Other:	
	Other:	
	Other:	

Project website: www.interreg-danube.eu/danube-skills