



KEY MESSAGES

- The North Sea-Rhine-Mediterranean corridor area is a key economic region. The corridor has a high share of inland waterway transport and offers enough capacity to absorb higher volumes to reduce increasing road congestion.
- Realising the Seine-Scheldt project is paramount, but it will only yield full network benefits if all connecting waterway projects on national territories are also implemented.
- Failure to address all bottlenecks across borders will have an adverse impact on the region's growth and ports' competitiveness in one of Europe's most economically active regions.

Corridor background

The North Sea-Rhine-Mediterranean corridor is home to Europe's most extensive waterway network. It is a densely populated economic powerhouse with the continent's largest seaports, industry production sites and logistics locations. Inland waterways have evolved into high-capacity hinterland connections driving the gateway function of maritime ports and vice versa.

In the Rhine-Alpine area, inland waterways represent a quarter of the corridor's length and carry half of all freight volumes, with a transport performance totalling 58 billion tonne-kilometres. Nearly all inland waterway containers are carried between seaports and hinterland of this area. In the North Sea-Mediterranean area, a quarter of all freight volumes are carried by inland ships. The North-South axis has a transport performance of 35 billion tonne-kilometres. But shares are uneven across the network and lower shares of inland waterway transport are also due to unsolved bottlenecks.

The corridor is also of high importance for river cruising and day trips, attracting high numbers of tourists to the beautiful regions and cities along these rivers.

Waterway infrastructure

In the Rhine-Alpine region, the improvement of the Meuse waterway and the enhancement of the fairway on the Middle Rhine are essential for improving navigation conditions and increasing the corridor's reliability. Moreover, the Low Water Action Plan for the Rhine including measures to maintain predictable transport conditions even

€18 billion

are required to make the inland waterway network of the North Sea Rhine Mediterranean corridor bottleneck-free and to increase climate resilience

in the event of frequent extreme low water periods due to climate change becomes increasingly important. Navigation resilience will be enhanced with the construction of 2nd lock chambers on the Mosel and the extension of locks for 135m vessels on the Neckar.

In the North Sea-Mediterranean area, the Seine-Scheldt project will bridge the Seine and Scheldt basins with a new waterway, the Seine-Nord Europe canal. But the project's impact will be much wider. All envisaged sub-projects in France and Belgium are aimed at unlocking the entire North Sea Rhine Mediterranean corridor by linking up the economic centres, maritime and inland ports over water. The modernisation of all existing connecting waterways and their locks in the area, including the Scheldt-Rhine canal, will ensure the network benefits across the corridor increasing the overall efficiency of waterway transport. These investments aim at shifting transport from congested roads to waterways with spare capacity, reducing externalities and preparing for climate change. The Seine-Scheldt Implementing Decision signed in June 2019 and revised in July 2024, cements the commitment by France and Belgium to realise the planned projects within the agreed 2030 timescale, but not all financing for the investments is secured yet. According to the corridor coordinator the non-completion of these projects would reduce cumulative GDP by 27% and total job creation by 30% compared to the reference case for 2030.

Inland ports

This corridor features many of the largest inland ports in the European network. Continued reliable navigation is the prerequisite to ensure the success of inland ports. The major investment challenges facing inland ports are those focusing on alternative fuel infrastructure development and the roll-out of smart and autonomous services. At the same time ports have to keep developing their multimodal service as well as new local urban mobility solutions.

50% In the Rhine-Alpine area, 50% of all the freight volumes are carried on inland waterways.

25% In the North Sea-Med area, 25% of all freight volumes are carried on inland waterways.

But the congested "Blue Banana" needs more to thrive, a single bottleneck affects the entire corridor.



"As an intermunicipal waste management company, we serve a clear social interest. We move large volumes of waste and are committed to shifting more of it from road to water to reduce congestion and meet climate targets. To achieve this, we require a well-connected waterway infrastructure and smart land use planning, including the development of more waste facilities along navigable waterways."

Paul MACKEN, CEO IOK



"IKEA is growing its business while reducing its climate and environmental impact through the use of inland shipping. For the past 2 years, we supplied over 100,000 Parisians in the centre of Paris via the Seine, removing 12,000 trucks from the road. This innovative urban logistics combines river transport and last-mile electric delivery. Thanks to the inland waterway, we have a better customer experience and a last mile in zero-emission delivery. We plan to expand this even further in the coming years."

Emilie CARPELS
Director of waterborne projects IKEA France



"As logistics service provider, we select multimodal transport solutions wherever possible. This approach has a positive impact on our environmental footprint, while road transport struggles with ever-lengthening traffic jams and driver shortages. Our multi-purpose terminal is strategically located on a canal, and we aim to deliver all goods, including general cargo and pallets, to our customers with the same or even better service. To make inland navigation a competitive choice, we must be able to rely on a reliable and extensive waterway infrastructure in Europe."

Dieter LAEBENS, CEO Laebens Logistics



Critical waterway locations



- 6 - Seine Scheldt Flanders - upgrades**
- a - Kortrijk-Bossuit canal
 - b - Hinterland connection, coastal seaports upgrade & passage via Bruges
 - c - River Lys and canal Lys-Roeselare
 - d - Upper Sea Scheldt & circular canal Ghent +stretch draught < 2.5m
 - e - Nete, bridge clearance <5.25m
 - f - Dender downstream
 - g - Brussels canal, bridge clearance <5.25m
 - h - Sea canal Brussels – Scheldt
- 7 - Seine Scheldt Wallonia - upgrades**
- a - Canal Brussels-Charleroi, bridge clearance <5.25m
 - b - Doubling Upper Scheldt locks to increase capacity
 - c - Lower Sambre improvement of crossing and turning conditions
 - d - Upgrade Walloon backbone <Va between Namur and Pommeroeul to ECMT class Va incl. locks (Marchiennes, Gosselies, Viesville and Obourg)
 - e - Resilience and adaptation to climate change
- 8 - Seine Scheldt France - missing links & upgrades**
- a - Canal Seine-Nord-Europe
 - b - Dunkirk-Scheldt Fontinette lock
 - c - Upper Seine Bray-Nogent <CEMT IV class
 - d - Lower Seine upgrade
 - e - MAGEO (Oise) capacity bottleneck
 - f - Rail bridge (Mours) reconstruction Oise
 - g - Le-Quesnoy-sur-Deûle lock extension



"Our roads are increasingly congested, and the impact of road transport on our carbon footprint is considerable. Added to this are the frequent risks of blockages and delays inherent to this mode of transport. Inland waterway transport, a high-potential development alternative, serves a threefold objective: providing a more reliable solution, partially relieving road traffic on our roads between industrial areas and our ports—gateways to international trade—and significantly reducing our CO2 emissions. All while offering a transportation cost that enhances the competitiveness of our European businesses. In this context, the reliability of the waterway network and associated development projects are essential for our sustainable economy to fully leverage these undeniable assets."

Philippe LESTRADE
Président MSC France & DG MEDLOG



"Investment in the reliability of inland waterway infrastructure represents the most expedient solution to our congestion issues and ensures the cost-effective delivery of building materials that are essential to our society."



Nick CELIS
CEO Construction materials André Celis

- 1 - Royers lock
- 2 - Albert canal - Wijnegem
- 3 - Canal Bocholt Herentals lock, bridge clearance <5.25m & CEMT class <IV
- 4 - Climate resilience Flemish waterways Sigma plan
- 5 - Remote control & automation of Flemish waterway infrastructure & upgrade for automated navigation
- 6 - Seine Scheldt Flanders - upgrades
- 7 - Seine Scheldt Wallonia - upgrades
- 8 - Seine Scheldt France - missing links & upgrades
- 9 - Rhône - Sète Canal, bridge clearance <5.25m
- 10 - Maasroute, stretch draught < 2.5m and <CEMT class IV
- 11 - Meuse modernisation weirs and locks incl. Grave
- 12 - Meuse-Waal canal modernisation Weurt lock
- 13 - Volkerak and Kreekrak locks capacity increase & modernisation
- 14 - Climate adaption plan for lower Rhine
- 15 - Rhine stretches draught <2.5m
 - Lower Rhine, fairway depth improvement Duisburg-Neuss from 2.5m to 2.8m & Neuss-Stürzelberg from 2.50m to 2.70 m at low reference water level
 - Middle Rhine Mainz-St. Goar , fairway depth improvement from 1.9m to 2.1m at low reference water level
 - Low Water Action plan for the Rhine
- 16 - Gamsheim 2nd lock chamber
- 17 - Upgrade of canalised Mosel FR: large gauge gateway for civilian-defense dual use, modernisation of locks & flood protection measures (MOMMA)
- 18 - Climate resilience programme
- 19 - Modernisation of Mosel locks DE, resilience bottleneck
- 20 - Neckar locks, capacity bottleneck
- 21 - VNF hydraulic management projects: waterway resilience through navigation dams and reservoir dams
- 22 - VNF Modernisation project: focus on structures and operational methods including remote control centers and maintenance centers

"As a trimodal port in Luxembourg, we provide our customers with an integrated logistics solution. By combining road and rail transport with inland waterway shipping, we enable a cost-effective and CO2-optimized mode of transportation. Inland navigation allows Luxembourg's industries to manufacture large and heavy goods, facilitating their export to markets across the globe."



Gilles BRAQUET, CEO LUXPORT S.A.