Socio-Economic development in the Danube corridor
“The Danube Belt“ – An economic development axis

Annual growth rates
GDP/capita at PPP 2000-2015

<table>
<thead>
<tr>
<th>Country</th>
<th>% p. a.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2.0</td>
</tr>
<tr>
<td>Poland</td>
<td>3.8</td>
</tr>
<tr>
<td>Czech Rep.</td>
<td>3.3</td>
</tr>
<tr>
<td>Austria</td>
<td>2.0</td>
</tr>
<tr>
<td>Slovenia</td>
<td>2.8</td>
</tr>
<tr>
<td>Slovakia</td>
<td>3.9</td>
</tr>
<tr>
<td>Hungary</td>
<td>3.3</td>
</tr>
<tr>
<td>Croatia</td>
<td>4.2</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>2.8</td>
</tr>
<tr>
<td>Romania</td>
<td>3.5</td>
</tr>
<tr>
<td>Ukraine</td>
<td>3.3</td>
</tr>
<tr>
<td>Turkey</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Source: Asumption of OIR based on forecasts of BMVIT, EC, WIIW
Cumulated direct foreign investment (FDI) [in billion €]

Source: Austrian Institute for Regional Studies and Spatial Planning

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Development of transport volume between Austria and CEECs [in 1,000 t]

Source: Austrian Institute for Regional Studies and Spatial Planning
Development of the Container transshipment in Constantza

Source: Port of Constantza
Increasing Container transport…

Source: Hulocon 2005

Source: Containerisation International, ISL, BRS, respective port authorities

* TEU (Twenty-Foot-Equivalent Unit)
Example: Automotive production sites in the Danube region

Source: via donau
Development of transport and transport forecasts for the Danube region
Volumes 2004

Source: NEA
Forecast: Volumes 2020

Source: NEA
Forecast: Relative development of volumes 2004-2020

% development of volumes 2004-2020:

Source: NEA
Forecast: Development of rail and road transport 2004-2020

Source: NEA
Forecast: Development of inland waterways transport on the Danube 2004-2020

Source: NEA
Forecast: Development of inland waterways transport on the Danube 2004-2020

Source: NEA
A national example:
Development of transport and transport forecasts in the Austrian Danube corridor
Traffic Increase Austrian Danube Corridor
Export, Import and Transit 1994-2005

Source: Austrian Institute for Regional Studies and Spatial Planning
Traffic Increase Austrian Danube Corridor
Transit relation 1994-2005

Source: Austrian Institute for Regional Studies and Spatial Planning
Transport forecast for the Austrian Danube 2015 (in million tons)

Source: Austrian Institute for Regional Studies and Spatial Planning
Conclusions for the development of inland waterway transport on the Danube
Current Transport volumes and transport forecasts for the Danube navigation

• The current annual transport volume on the Danube amounts **about 30 mln. tons**

• A **doubling** of the transport volume on the Danube **until 2015-2020** up to **60 mln. tons** seems to be a realistic scenario and would correspond with the overall economic development of the Danube area

• Reality check: In the year **1980** already **60 mln. tons** have been transported on the Danube – under other political and socio-economic framework conditions
Development of transport volume and performance on the Rhine and on the Danube

<table>
<thead>
<tr>
<th>Year</th>
<th>Danube [mln tons]</th>
<th>Rhine [mln tons]</th>
<th>Danube [bn tkm]</th>
<th>Rhine [bn tkm]</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>30</td>
<td>300</td>
<td>17</td>
<td>90</td>
</tr>
<tr>
<td>2015-2020</td>
<td>60</td>
<td>350</td>
<td>34</td>
<td>105</td>
</tr>
</tbody>
</table>
Need for active IWT policy of Danube countries

To cope with the growing traffic volume in the Danube corridor in a social and environmental sound way:

• Free capacities of the Danube river should be better employed
• Waterway transport should be integrated into high-quality logistics chains
• Waterway transport should be modernised and made more attractive, following the objectives of the European action programme for inland waterway transport NAIADES