



# Interreg



## Danube Transnational Programme

### DIONYSUS

**Integrating Danube Region into Smart & Sustainable  
Multi-modal & Intermodal Transport Chains**

## National Recommendations and Consolidated Strategy Plan

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### 3. Abbreviations

Abbreviation	Explanation
<b>EU</b>	European Union
<b>ÖREK</b>	Österreichisches Raumordnungskonzept (Austrian Spatial Development Concept)
<b>ÖROK</b>	Österreichische Raumordnungskonferenz (Austrian Conference on Spatial Planning)
<b>SVP</b>	Slovenský vodohospodársky podnik (Slovak Water Management Enterprise)
<b>VV</b>	Vodohospodárska výstavba, š.p. (Water management construction, state enterprise)
<b>VPAS</b>	Verejné prístavy, a.s. the project partner PP5
<b>SR</b>	Slovak republic
<b>NDSRC</b>	National Development Strategy of Republic of Croatia until 2030
<b>NRRP</b>	National Recovery and Resilience Plan 2021-2026
<b>MSTI</b>	Ministry of the Sea, Transport and Infrastructure
<b>SPDS</b>	Spatial Development Strategy
<b>WMS</b>	Water Management Strategy
<b>EDS</b>	Energetic Development Strategy
<b>VSCDS</b>	Vukovar-Srijem County Development Strategy
<b>ACS</b>	Agricultural Strategy
<b>PGA</b>	Port Governance Agency
<b>IWT</b>	Inland Waterway Transport
<b>RS</b>	The Republic of Serbia
<b>BSO</b>	Business support organisations

<b>IRBP</b>	Interreg VI-A Romania-Bulgaria Programme
<b>ITDS</b>	Integrated Territorial Development strategy
<b>ITS</b>	Integrated Transport Strategy
<b>NCR</b>	North Central region
<b>NDPB</b>	National Development Programme BULGARIA
<b>NRRP</b>	National Recovery and Resilience Plan
<b>NSSME</b>	National Strategy for Small and Medium-sized Enterprises
<b>NWR</b>	North West region
<b>SME</b>	Small and medium-sized enterprises



## 4. Executive summary

This report summarizes the findings of the three deliverables: Deliverable D.T3.1.1, Analysis of regional economic development strategies, policies and programmes with regard to Danube ports, Deliverable D.T3.1.2 Analysis of European & National Transport Policies, Strategies & Programs with regard to the Danube Ports and Deliverable D.T3.1.3 Assessment of existing gaps in Regional Development and Transport Policies.

This document identifies gaps in economic and transport development strategies in the Danube countries (national level) and in the EU (supranational level). It also delivers a set of recommendations for the bridging of identified gaps in order to reach the desired state of each strategic document analysed in the report.

In *Austria*, a number of economic development strategies and transport development strategies were analysed and there were some findings on gaps that are listed in this report.

In *Slovakia*, identified gaps in the analysed strategies have demonstrated, inter alia, less than sufficient awareness of importance of ports in the national development and a set of reasonable mitigating recommendations were given.

In *Hungary*, economy development strategies were identified which aim at different port related sectors of the economic system. The National Clean Development Strategy 2020-2050 is the key document in Hungary for reaching climate neutrality through investing in green economy while minimalizing greenhouse gas emissions. The sustainable and climate resilient economy development is the pathway of the future, where ports are needed to find their own role and benefits. National Development and Spatial Development Concept 2014-2030 sets out a common direction for policies in terms of national and regional development which serves as a basis for the partnership agreement between the EU and Hungary, thus contribute to the creation of the 2014-2020 Operational Programmes. While the Concept outlines the main development goals of Hungary, specific areas are not covered for instance innovation and policy harmonising of transportation systems.

The most related document to the port development is the National Port Development Master Plan Strategy 2020-2030. The Master Plan outlines the necessary steps to the development of the existing services and making the ports ready to deal with the increased trade volumes while on the other hand it does not mention the changing role of ports in the pathway toward industry 4.0 and climate neutrality.

These economic development strategies were analysed focusing on the current and willing to achieve state in order to the development gaps could be identified and recommendations were proposed for closing them.

Within the transport development strategies in Hungary, the common denominators among the recommendations for identified gaps were an open, adaptable, dynamic economy based on competition and innovation, in which environmental protection plays a key role. This is reflected on the one hand, in the greater use of water transport, which is less polluting than other modes of transport, and on the other hand, in the replacement of technically obsolete and more greenhouse gas-emitting vehicles and the increased use of alternative fuels. An equivalent task to increasing competitiveness

is to ensure the preservation of natural and human values and resources, the conditions for sustainable growth, and the coordination of environmental and economic, national and EU objectives that may conflict with each other.

In *Croatia*, different economic strategic documents were analysed and the main identified gaps are lack of cross-sector harmonization in the sense of validity of the strategic documents that is not aligned, and there is no methodology for sector specific projects. Sometimes projects overlap so one is obstacle to another. That should be avoided by cross-sector cooperation and by involving all relevant subjects in strategic documents preparation. It is also important to recognize significance of the inland navigation and inland transport as of importance for the overall economy development of the Republic of Croatia. It could be of importance for the agricultural sector, as agricultural products transport is in the close connection to inland transport, at least it should be. Same is with spatial planning, where port development should have the back up and documents of such level should not be an obstacle for the development. Tourism on rivers, especially river cruising and nautical tourism are of the great perspective and that should be considered when preparing strategic documents.

It has also been found that many of the strategic documents for transport development expire long before new issues are prepared and adopted by the relevant bodies, causing problems when preparing the specific projects for financing, because they do not have necessary background in strategic documents. Moreover, priority projects and criteria for defining priorities are not clearly defined. Mid-term strategic documents do not foresee some of the projects risks and non-realization and they are not allowed to be adjusted/changed in line with real needs and market demands. Some projects from different transport sectors, which are all within the same Ministry, overlap and are obstacle to one another, which calls for much higher level of coordination.

In *Serbia*, the analysis of strategic development documents revealed the insufficient integration between the individual transport modes, lack of information on the availability of transshipment capacities in ports and insufficient information on the benefits of water transport, lack of harmonised international administrative procedures, including border crossing, and corresponding national/international IWW regulations for implementation of the digitalisation of these processes, lack of awareness that inland ports are crucially important elements of the transport network, lack of intersectoral coordination and cooperation in port and spatial planning, lack of intersectoral coordination between strategies in water and railway transport and lack of attention to automation in inland port operations. Recommendations on how to bridge the gaps were given taking into account the necessity to provide mutual benefits for both ports and other elements of the transport network and country's economy.

In *Romania*, the national transport policies, strategies & programs with regard to the Danube ports are established by the central authority – the Ministry of Transport and Infrastructure. The main strategic document for transport infrastructure is the General Transport Master Plan (modified at the end of 2021) and will be the basis for 2021 – 2027 EU financing period. For ports, the document will be supplemented with a naval transport strategy. The naval transport strategy will be prepared within a project financed from the Large Infrastructure Sectorial Program 2014 – 2020 and will provide

a deep analysis on the current situation of infrastructure and cargo flows, on the institutional system and tariffs. The Strategy for Development of the Naval Transport in Romania aims to achieve a correct and concrete planning of investments necessary to be supported in Romanian ports, a resizing of tariff and customs policies, the creation of strategic alliances with the states on the Caspian and Black Sea corridor. The possibility of local authorities along the Danube to become eligible for funding for new commercial and tourist port infrastructure will also be considered.

The naval transport strategy is mentioned in the Recovery and Resilience national plan as basis for future reforms in the field.

The Government Program 2021 – 2024 is a short-term strategy of national significance. It defines the priorities of the Government during its mandate. The actual Government Program contains general directions, but also mention concrete projects to be implemented and stress the importance of the development of the Port of Constanta.

All the national strategies take into consideration the European priorities established under TEN-T Regulation 1315/2013 defining the core and comprehensive networks of ports and inland waterways and their components and CEF Regulation 1316/2013 defining the multimodal core corridors with focus on inland waterways and rail, as environmentally friendly modes of transport.

In *Bulgaria*, several economic development strategies were analysed and various gaps were identified together with the set of recommendations to bridge the gaps. The first examined document is the National Recovery and Resilience Plan. The most significant gaps in the plan are the lack of focus on port development and insufficient attention to road infrastructure in port areas. The gaps identified in the National Strategy for Small and Medium-sized Enterprises 2021-2027, which sets the government's vision for support and development of small and medium-sized companies, are related to the lack of measures to improve transportation and storage services and insufficient financial support for export-orientated SMEs. Recommended measures include construction of storage areas, development of logistics software tools for warehouse management, allocation of a larger share of the strategy's budget for investments in support of export activities, etc.

The Interreg VI-A Romania-Bulgaria Programme is found to have a lack of incentives to reduce air pollution caused by ships and lack of measures in support of cruise industry, while mitigating measures included development of projects for implementation of regulations on shipping emissions, development of charging infrastructure for alternative fuels, investments in the improvement of road infrastructure in the area of tourist sites, development of health protocols, and others.

Integrated Territorial Development strategies – North West and North Central regions (NUTS 2) 2021-2027 lacks incentives in support of cruise industry, for which the mitigating measures encompass the construction of dedicated river cruise terminals and modernisation of the existing ones, promotion of cruise tourism and popularisation of tourist sites in the area of port cities.

When Bulgarian transport development strategies are concerned, the Integrated Transport Strategy for the period until 2030 and the Transport Connectivity programme 2021 – 2027 are selected for more detailed examination based on their

scope, horizon, and significant relevance to port activities. The most significant gaps in the Integrated Transport Strategy are the lack of incentives for construction and development of river port facilities, and insufficient measures in support of road and railroad infrastructure in the areas of ports. Moreover, the gaps identified in the Transport Connectivity Programme were insufficient support for the development of road and railroad infrastructure in river port areas. Mitigating measures included modernization and rehabilitation of railway stations in port cities and of the relevant rail lines.

On the *European Union* level, the EU transport policy helps keep the European economy moving by developing a modern infrastructure network allowing the transport of people and goods to be quicker and safer, while at the same time promoting sustainable and digital solutions.

Transport policy of the EU is largely based on a 2011 White Paper, comprising 40 initiatives designed to generate growth, jobs, reduce dependence on imported oil, and cut the sector's carbon emissions by 60% by 2050. Many other specific strategies and policy documents for different means of transportation have been based on the 2011 White Paper.

However, although having the same origin, many European transport related policy documents are not always fully aligned with other existing documents or legislation and many of them do not take into account the implications of their own provisions on the functioning and development of other related transport modes or initiatives and activities.

A selection of five out of fifteen reviewed transport policy documents was made, and screened for possible gaps that could have a negative impact on ports in various aspects. In this view, gaps were identified and analysed in the 2011 White Paper: Roadmap to a single European transport area, Trans-European Transport Network Policy (TEN-T Guidelines, Regulation 1315/2016 with the proposal for the revision of the TEN-T Guidelines - COM(2021) 812 final), Sustainable and Smart Mobility Strategy, NAIADES III Action plan and the European Rail Network for Competitive Freight (Regulation EU 913/2010).

Identified gaps vary in their scope and nature from one policy document to another. They range from lack of awareness that inland ports are crucially important elements of transport network and lack of market access regulation for inland ports, through lack of recognition of inland ports as cross-border sections of the transport network and lack of recognition of inland ports as poly sectoral hubs of transport, industry, logistics and energy where sustainable production and cargo operations take place, to missing specification of the quality of inland port infrastructure and no criteria and appropriate KPIs are identified to assess the quality of inland port infrastructure.

Based on the analysis of the current states, objectives that need to be achieved with the desired state, various recommendations are given, along with the brief suggested implementation strategy and a general timeline of recommended actions. All recommended actions are designed in such way to provide multiple win-win situations for all involved stakeholders, as well as to call for significantly more transparency, awareness raising, cooperation and coordination in policy making.

Finally, the number and the characteristics of identified gaps demonstrated that there are huge gaps not only in intersectoral cooperation, but also between different transport modes within the transport sector itself. In connection with that, virtually every strategic document that was analysed was found to have various levels of influence on ports (existing or potential). Each participating project partner proposed a set of recommendations on how to close the identified gaps along with the proposed time frame for such actions.

The main message of the National Recommendations and Consolidated Strategy Plan is that both sectoral and intersectoral cooperation needs serious improvement for the benefit of the strategic national interests and for the transport network of the Danube region as a whole. Fortunately, all the gaps that were identified are possible to be bridged and a myriad of very useful, realistic, concrete and achievable recommendations are given.

## 5. Regional and national economic development strategies with existing or potential influence on ports, existing gaps and recommendations to close them

A detailed analysis of regional economic development strategies, policies and programmes regarding the Danube Region ports, was elaborated country by country, for a harmonized approach for optimal multi-modal integration of Danube ports in the economic infrastructure of the Region.

### 5.1 Economic development strategies of Danube countries with existing or potential influence on ports

The following table summarizes the identified economic development strategies of Danube countries with existing or potential influence on ports.

Economic development strategies, policies and programmes	Country	Mentioning ports	Not mentioning ports, but could affect	Low influence on ports	Medium influence on ports	Strong influence on ports
Austria's Recovery & Resilience Plan	AT	-	x		x	
Austrian Spatial Development Concept 2030(ÖREK 2030)	AT	-	x	x		
Vienna 2030 – Economy & Innovation	AT	-	x		x	
Financial administration development strategy 2014-2020	SK		x		x	
National Investment Plan of the Slovak Republic for the years 2018 - 2030 PILOT VERSION	SK	x				x
Economic Policy Strategy of the Slovak Republic until 2030	SK		x		x	



Strategy of the Environmental Policy of the Slovak Republic until 2030	SK		x		x	
Concept for the development of urban public transport in Bratislava for the years 2013-2025	SK	x		X		
Tourism development strategy until 2020	SK	x		x		
Smart concept of regional development of the Nitra self-governing region until 2027	SK	x			x	
National Clean Development Strategy 2020-2050 <sup>1</sup>	HU	X				X
National Development and Territorial (Spatial) Development Concept 2014-2030 <sup>2</sup>	HU	X			X	
National Port Development Master Plan Strategy 2020-2030	HU	X				X
National plan for Recovery and Resilience 2021-2026	HR	X				
Water Management Strategy until 2038	HR	X				
Agricultural Strategy 2020-2030 (draft)	HR				X	
Strategy for Spatial Development until 2030	HR	X				
Tourism Strategy until 2020	HR		X		X	

<sup>1</sup> Complete document (HUN):

<https://cdn.kormany.hu/uploads/document/5/54/54e/54e01bf45e08607b21906196f75d836de9d6cc47.pdf>

Executive summary (ENG):

<https://cdn.kormany.hu/uploads/document/6/66/666/666e0310ef20606fba9f96f4fbf0d74bbaa1638e.pdf>

<sup>2</sup> [http://www.terport.hu/webfm\\_send/4616](http://www.terport.hu/webfm_send/4616)

Energetic Development Strategy until 2030 looking to 2050	HR		X			
Waste Management Strategy until 2025	HR		X			
Master Plan for the Functional Region East Croatia - draft	HR		X			
Vukovar-Srijem County Development Strategy until 2020	HR	X				
Strategy for Reconstruction and Development of the City of Vukovar 2014-2020	HR	X				
Draft of Spatial plan of the Republic of Serbia from 2021 to 2035	RS	X				
The Strategy for Agriculture and Rural Development of the Republic of Serbia from 2014 to 2024	RS		x			
Industrial policy strategy of the Republic of Serbia from 2021 to 2030	RS		x			
National Recovery and Resilience Plan	BG	X			X	
National Strategy for Small and Medium-sized Enterprises 2021-2027	BG	X		X		
Interreg VI-A Romania – Bulgaria Programme	BG	X				X
Integrated Territorial Development strategies – NorthWest and North Central regions (NUTS 2) 2021-2027	BG	X				X
Strategy on the National Policy Framework for the development of the market regarding alternative fuels in	RO	X (Constanta and Galati)			x	



the transport sector and for the installation of the relevant infrastructure in Romania						
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**Table 1: Summary of analysed economic development strategies and their influence on ports**

## 5.2 Identified gaps in the economic development strategies, actions (recommendations) to close the gaps

The table below summarizes the gaps in economic development strategies and recommended actions to close the identified gaps.

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
	AT	<b><u>Document: Austria's Recovery &amp; Resilience Plan</u></b>		
2	AT	Lack of mentioning inland waterways/inland ports in the chapter on environmentally-friendly mobility	Inclusion of inland waterways/inland ports in the field of environmentally-friendly mobility	Action 1: 2020 - 2026
3	AT	Focus on passenger transport, but no mentioning of freight transport	Funding of initiatives that focus on freight transport, such as modernisation of terminals or ports	Action 2: 2020 – 2026
4	AT	No reference to sustainable supply chains and how inland ports can contribute to it	Adding Initiatives that address the importance of inland ports for the development of sustainable supply chains.	Action 3: 2020 - 2026
	AT	<b><u>Document: Austrian Spatial Development Concept 2030(ÖREK 2030)</u></b>		
2	AT	Lack of mentioning inland waterways/inland ports in order to increase the capacity and quality of transport hubs	Adding the importance of inland waterways/inland ports in the call of action for increasing the capacity and quality of transport hubs.	Action 1: 01/2022 – 12/2030 (Revision of ÖREK)
3	AT	Focus on rail connections for business areas, but no comment on port connection	Promoting the development of business areas well-connected to ports resp. in port areas	Action 2: 01/2022 – 12/2030 (Revision of ÖREK)

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
3	AT	No reference to the potential role of ports within the urban logistics system	Including the importance of well-developed and sustainable ports to the call of action on climate-neutral, environmentally and urban friendly transport logistics.	Action 3: 01/2022 – 12/2030 (Revision of ÖREK)
	AT	<b><u>Document: Vienna 2030 – Economy &amp; Innovation</u></b>		
3	AT	Lack of specification of objective on CO2-neutral transport of goods with regard to modes of transport	More precise description of the objective on CO2-neutral transport of goods with regard to modes of transport	Action 1: 01/2022 – 12/2030 (Revision of strategy Vienna 2030)
2	AT	Lack of specification of objective on top-class and climate-friendly transport infrastructure with regard to modes of transport	More precise description of top-class and climate-friendly transport infrastructure with regard to modes of transport	Action 2: 01/2022 – 12/2030 (Revision of strategy Vienna 2030)
1	AT	No flagship project focussing on ports	Flagship project with focus on digitalisation or decarbonisation of the port of Vienna	Action 1: 01/2022 – 12/2030 (Revision of strategy Vienna 2030)
	SK	<b><u>National Investment Plan of the Slovak Republic for the years 2018 - 2030 Pilot Version</u></b>		
5	SK	Low share of water transport on the market	Action 1: Improve navigation parameters and eliminate bottlenecks on the Danube River  Action 2: Modernize the public ports of Bratislava and Komárno  Action 3: Complete the Váh waterway	<u>Action 1:</u> 2030  <u>Action 2:</u> 2030  <u>Action 3:</u> 2030

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
	SK	<b><u>Economic Policy Strategy of the Slovak Republic until 2030</u></b>		
4	SK	Lack of human capital in waterway transport	<p>Streamline and simplify the education</p> <p>Simplify the dual education system</p> <p>Improve the quality of higher education</p> <p>Reassess conditions for managed labor immigration</p>	<p><u>Action 1</u>: 2030</p> <p><u>Action 2</u>: 2030</p> <p><u>Action 3</u>: 2030</p>
5	SK	Underutilized potential of water transport	<p>Diversify sources and transport routes for natural gas, oil and electricity where necessary in terms of energy security, economic efficiency and competitiveness of energy consumers</p> <p>To support the use of domestic renewable energy sources, biomass and hydropower potential of the Slovak Republic, taking into account the requirements of air quality (especially in the case of the use of biomass).</p> <p>Strengthen the construction, development and efficiency of transport infrastructure, public passenger transport, non-motorized transport and electrified public transport in order to reduce energy efficiency and reduce emissions and improve air quality.</p> <p>Stimulate the development of technologies and infrastructure using alternative forms of fuels in passenger motor transport to a competitive and affordable level e.g. in the field of electromobility.</p>	<p>Action 1: 2030</p> <p>Action 2: 2030</p> <p>Action 3: 2030</p> <p>Action 4: 2030</p>
	SK	<b><u>Strategy of the Environmental Policy of the Slovak Republic until 2030</u></b>		
3	SK	Gaps in Climate change and air protection	Implement sustainable transport solutions	<u>Action 1</u> : 2030

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
			Build green infrastructure	<u>Action 2</u> : 2030
2	SK	Gap in Flood protection	Increase the use of green measures Not allowing construction in areas at risk of floods	<u>Action 1</u> : 2030 <u>Action 2</u> : 2030
4	SK	Gap in Clean air policy	Gradually reduce electricity production from coal Increase the share of low-emission transport	<u>Action 1</u> : 2030 <u>Action 2</u> : 2030
	SK	<b><u>Smart concept of regional development of the Nitra self-governing region until 2027</u></b>		
5	SK	Use of the Danube waterway (as a cross-border link) including smart tourism	Transformation of the port of Komárno - smart logistics centre Komárno	<u>Action 1</u> : 2027
	HU	<b><u>National Clean Development Strategy 2020-2050<sup>3</sup></u></b>		
2	HU	Technology readiness	Technology assessments, prototyping and trainings.	<u>Action 1</u> : 2023-2024 elaborating assessments – 2025-2030 prototyping
1	HU	Financial support	Assessment of investment needs, creation of an innovation fund.	<u>Action 2</u> : In 2023 assessment of investment needs and in 2024-2030 establishing an innovation fund.
3	HU	Cooperation between ports	Online platform for experience, best practice sharing, study trips.	<u>Action 3</u> : Creation and operation of the online

<sup>3</sup> Complete document (HUN):

<https://cdn.kormany.hu/uploads/document/5/54/54e/54e01bf45e08607b21906196f75d836de9d6cc47.pdf>

Executive summary (ENG):

<https://cdn.kormany.hu/uploads/document/6/66/666/666e0310ef20606fba9f96f4fbf0d74bbaa1638e.pdf>

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
				platform in 2023-2030, study trips in 2023-2024
	HU	<b><u>National Development and Territorial(Spatial) Development Concept 2014-2030<sup>4</sup></u></b>		
4	HU	Environment friendly transport infrastructure development	Creation of an environment impact assessment and technological assessments, then introduction of new technologies.	<u>Action 1:</u> 2023-2024 elaborating assessments – 2025-2030 prototyping
2	HU	Innovation and technology in transport infrastructure	The port related future technologies should be analysed, prototypes and experimental developments should be implemented.	<u>Action 2:</u> 2023-2024 elaborating assessments – 2025-2030 prototyping
1	HU	Harmonising the transportation policies	Creation/review of waterborne transportation-oriented masterplan and project generation accordingly	<u>Action 3:</u> 2023-2024 creation/review strategies and in 2025-2030 project generation and implementation
	HU	<b><u>National Port Development Master Plan Strategy 2020-2030</u></b>		
2	HU	Ports in favour of climate neutrality	Revision of the Master Plan and prototyping	Action: 2023-2024 revision of the Master Plan and in 2025-2030 implementation of prototypes and experimental systems
	HR	<b><u>Water Management Strategy until 2038</u></b>		
3	HR	Cross sector strategic documents validity period harmonization	Harmonization of the strategic documents of the same level that could influence one another and	2031-2032

<sup>4</sup> [http://www.terport.hu/webfm\\_send/4616](http://www.terport.hu/webfm_send/4616)

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
			harmonization of their validity period.	
1	HR	Methodology for sector specific projects coordination	Active involvement of all sectors during the strategic documents preparation to avoid specific projects overlapping.	For all further documents
	HR	<b><u>Agricultural Strategy 2020-2030</u></b>		
3	HR	Foster the development by using the more environmentally friendly and the cheapest modes of transport	Include and stimulate agricultural sector development to encourage development of the logistic hubs in ports, to use the most eco-friendly mode of transport. Plan and include within objectives B1 - Backing of the agricultural solutions that are acceptable for environment, climate & animal welfare; C4 - Development of the agricultural food logistic centres and E1 - Increase of the rural areas' connection with market.	During its preparation
	HR	<b><u>Strategy for Spatial Development until 2030</u></b>		
1	HR	Lack of cross-sector harmonization	Update the strategic projects list and harmonize all strategic documents that have cross-sector impact	2028-2030 - expected new SPDS and Transport Strategy preparation
	HR	<b><u>Tourism Strategy until 2020</u></b>		
1	HR	Defining river cruising and river nautical tourism as touristic potentials	when preparing the new Tourism Strategy reconsider other touristic potentials connected with inland navigation and rivers as a potential	2022
	HR	<b><u>Vukovar-Srijem County Development Strategy until 2020</u></b>		
2	HR	Lack of state and regional harmonization	Update the strategic projects of relevance for the County and harmonize all strategic documents that have cross-sectoral impact	2022-2023

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
	RS	<b><u>Draft of Spatial plan of the Republic of Serbia from 2021 to 2035</u></b>		
1	RS	Insufficient and uneven connection, accessibility and equipment of parts of the territory with traffic, communal and social infrastructure	Further development of transport infrastructure – roads, railways, inland waterways.	2025-2030
2	RS	Great regional differences in the level of industrial development, there is a spatial polarization and dominant concentration of industry in the metropolitan areas	Stronger regional competitiveness and regional economic development, more balanced regional economic and social development, reduced share of underdeveloped areas	2025-2030
	RS	<b><u>The Strategy for Agriculture and Rural Development of the Republic of Serbia from 2014 to 2024</u></b>		
1	RS	The document does not cover the subject of transport of agricultural goods by inland waterways	Include the chapter regarding the possibilities of transport of agricultural goods by inland waterway transport.	2024
2	RS	Lagging in technological development compared to the competing countries	Improving the competitiveness of the agri-food sector requires support for restructuring, development and innovation along the entire food chain. Modernization and technological development of the sector (except capital investments in resources, physical capital and knowledge transfer), implies the application of modern production technologies in the processing sector. Of special importance for the agriculture of the Republic of Serbia is the improvement of the competitiveness of the processing sector, which should be based as much as possible on domestic raw materials and achieving as much added value as possible, to increase export competitiveness.	2024
3	RS	Inefficient confrontation of the agricultural sector with the effects of climate change	Operational objectives that should help more efficiently facing food production with this challenge are monitoring climate change, creating adaptation measures and adequate measures aimed at reducing	2024

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
			greenhouse gas emissions from agricultural production; improvement and adaptation of production technology; technical improvements of land, facilities and equipment; raising awareness of climate change, its consequences and needs for their solution.	
4	RS	The need to increase the efficiency of the food chain and competitiveness of the agri-food sector	Operational goals leading to the realization of this priority are: development of new services in the food chain and strengthening of logistics food production infrastructure; increasing the capacity of agricultural holdings to join global market chains (supply trade chains); strengthening the motivation of producers for various forms of association; strengthening the capacity of cooperatives to become financial, market and advisory service of cooperatives; strengthening the visibility and recognizability of domestic products on the market; strengthening the export performance of the agricultural sector; strengthening horizontal and vertical links in the production chain, based on market principles; reducing the presence of the gray economy; strengthening and development of market organizations.	2024
	RS	<b><u>Industrial policy strategy of the Republic of Serbia from 2021 to 2030</u></b>		
1	RS	The document does not cover the subject of ports (i.e. establishment of industrial zones in the hinterland of ports)	Include the chapter regarding the establishment of industrial zones in the hinterland of ports	2030
2	RS	Present infrastructure gaps	Support to development and improvement of production processes via industrial institutional infrastructure projects. Support programme for development of infrastructure for the needs of industrial zones	2030



Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
3	RS	Major imbalance in the development level of different regions	Balancing regional industrial development.	2030
4	RS	Total volume of industrial investments, accompanied by the improved quality of investments	Incentive programme for investments in industrial production. Adjusting the criteria for attracting industrial investments aimed at increasing the share of domestic gross value added.	2030
5	RS	High share of low value-added products in exports	Identifying and stimulating export-oriented industrial sectors entailing higher stages of processing. Promotion of the Republic of Serbia as an investment destination open to new investments of domestic and foreign companies with higher value added.	2030
6	RS	Technological structure of exports	Identifying and stimulating export-oriented industrial sectors entailing higher stages of processing. Support programme for industrial companies to enter supplier chains of multinational companies.	2030
	<b>BG</b>	<b>National Recovery and Resilience Plan</b>		
1	BG	Lack of focus on port development	Plan amendments in subchapters <i>Transport Connectivity</i> and <i>Digital Connectivity</i> . Target the gap in the process of updating the strategic framework for the development of the transport sector.	<u>Short-term actions</u> (amendments in the plan): in the first quarter of 2022 or before the plan is officially approved by the EU.
4	BG	Insufficient attention to road infrastructure in port areas	Suggesting investments for the completion of the Hemus motorway, and for the improvement of the	<u>Long-term actions</u> (updating existing

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
			network of lower class roads in the region.	transport strategies); throughout the period of implementation of the plan.
	BG	<b><u>National Strategy for Small and Medium-sized Enterprises 2021-2027</u></b>		
1	BG	Lack of measures to improve transportation and storage services	Construction of storage areas, development of logistics software tools for warehouse management, development of goods packaging equipment.	<u>Short-term actions</u> (through annual implementation programmes); within 2022.
4	BG	Insufficient financial support for investments in export activities	Allocation of a larger share of the budget of the NSSME for investment in activities related to export. Promotion of international trade in annual implementation programmes.	<u>Long-term actions</u> (next programming period); beyond 2027.
	BG	<b><u>Interreg VI-A Romania – Bulgaria Programme</u></b>		
4	BG	Lack of incentives to reduce air pollution caused by ships	Implementation of regulations and investments in the development of charging infrastructure for alternative fuels.	<u>Short-term actions</u> (implementation of regulations and health protocols); throughout 2022.
1	BG	Lack of measures in support of cruise industry	Development of superstructure, waste treatment and disposal systems, road infrastructure in the area of tourist sites, and development of health protocols.	<u>Long-term actions</u> (modernization of river ships; development of charging systems, waste

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
				disposal facilities and road infrastructure): throughout the programming period (2021 – 2027).
	BG	<b><u>Integrated Territorial Development strategies – NorthWest and North Central regions (NUTS 2) 2021-2027</u></b>		
2	BG	Lack of incentives in support of cruise industry	Building river cruise exclusively dedicated terminals and modernisation of the existing ones; promotion of cruise tourism; popularisation of tourist sites in the area of port cities etc.;	<p><u>Short-term actions</u> (promotion of cruise tourism and popularisation of tourist sites in the area of port cities): within the next tourist season.</p> <p><u>Long-term actions</u> (building and modernisation of river cruise dedicated terminals): throughout the programming period (2021 – 2027)</p>
	RO	Alternative fuels infrastructure deployment (AFID)	<p>Action 1: research in order to establish the cost effective solution for the ships with lower emission</p> <p>Action 2: research in order to establish the requirements for the port related infrastructure</p>	<p><u>Action 1:</u> 2022 - 2030</p> <p><u>Action 2:</u> 2022 - 2030</p>

**Table 2: Gap analysis summary for the Danube region**

## 6. National Transport Policies, Strategies and Programmes with existing or potential influence on ports, existing gaps and actions (recommendations) to close them

The Analysis of European & National Transport Policies, Strategies & Programs with regard to the Danube Ports, contains an in-depth insight of national transport strategies and is based on national reports delivered by project partners.

### 6.1 Transport strategies of Danube countries with existing or potential influence on ports

Transport development strategies, policies and programmes identified to have substantial or more than marginal influence on ports are listed in the following table.

Transport development strategies, policies and programmes	Country	Mentioning ports	Not mentioning ports, but could or should affect ports	Low influence on ports	Medium influence on ports	Strong influence on ports
Austria's 2030 Mobility Master Plan	AT		X			x
RTI Strategy Mobility	AT		X		x	
Danube Action Programme by Bmvit until 2022	AT	X				x
Strategic plan for the development of transport in the Slovak Republic until 2030	SK					
Program Statement of the Government of the Slovak Republic for 2021 – 2024	SK	X				X
Water transport development concept of the Slovak republic (2000) updated version (2004)	SK		X			

National Port Development Master Plan (Országos Kikötőfejlesztési Főterv) 2019	HU	X				X
National Transport Infrastructure Development Strategy (Nemzeti Közlekedési Infrastruktúra-fejlesztési Stratégia) 2014	HU	X		X		
National Danube Water Transport Strategic Plan (Nemzeti dunai vízi közlekedési stratégiai terv) 2013	HU	X		X		
National Shipping Strategy (Nemzeti Hajózási Stratégia) 2012	HU	X			X	
Hungarian shipping and the Danube Strategy, and the Széchenyi Plan (A magyar hajózás és a Duna Stratégia, valamint a Széchenyi terv) 2010	HU	X			X	
Budapest Agglomeration Railway Strategy (Budapesti Agglomerációs Vasúti Stratégia) 2020	HU					
Mid-term Logistics Strategy (Középtávú Logisztikai Stratégia) 2013	HU					
River Transport Development Strategy 2008-2018	HR	X				
Mid-term Development Plan for Inland Waterways and Ports 2009-2016	HR	X				
National Program for the Railway Infrastructure 2016-2020	HR					X
Construction and Maintenance of Public Roads Program 2017-2020	HR		X			
Air Transport National Safety Program	HR			X		
Transport Master Plan of the East Croatia Functional Region	HR	X				X
Strategy of railway, road, inland waterway, air and intermodal	RS	X				X

transport development in the Republic of Serbia 2008-2015						
Strategy on Waterborne Transport Development of the Republic of Serbia, 2015 -2025	RS		X			
Railway Master Plan	RS	X				X
Integrated Transport Strategy for the period until 2030	BG	X				X
Transport Connectivity programme 2021 – 2027	BG	X			X	
The Government Program 2021 - 2024	RO	X			X	
General Transport Master Plan 2020 - 2030	RO	X			X	
Institutional Strategic Plan	RO	X				X
Naval Transport Strategy	RO	X		X		

**Table 3: National Transport Policies, Strategies and Programmes in Austria, Slovakia, Hungary, Croatia, Serbia, Bulgaria and Romania**

## 6.2 Identified gaps in the transport development strategies, actions (recommendations) to close the gaps

The following table summarizes the gaps and actions to close the identified gaps, for each transport strategy identified by the Danube countries.

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
	<b>AT</b>	<b>Austria's 2030 Mobility Master Plan</b>		
1	AT	<p>Gap 1: Lack of recognition of inland ports as crucial aspects for improving inland waterway transport (level 1).</p> <p>Gap 2: No reference to the role of ports in providing green energy to vessels (level 2).</p> <p>Gap 3: Lack of recognition of ports for achieving climate-neutral supply chains (level 3).</p>	<p>Recognition of ports as central multimodal transport hubs that are crucial for increasing the share of inland waterways in freight transport in the plan</p> <p>Reference to the potential of ports as facilitators of clean energy and alternative fuel provision</p> <p>Underlining the benefits of ports regarding climate-neutral supply chains</p>	<p>Action 1: 09/2022 – 12/2030</p> <p>Action 2: 09/2022 – 12/2030</p> <p>Action 3: 09/2022 – 12/2030</p>
	<b>AT</b>	<b>RTI-Strategy Mobility – (Research, Technology, Innovation)</b>		
1	AT	<p>Gap 1: Lack of recognition of the role of inland ports for the increased integration of inland waterway transport (level 1).</p> <p>Gap 2: Lack of recognition of inland ports for a climate-neutral urban logistics network (level 2).</p> <p>Gap 3: No recognition of inland ports as experimental spaces for innovation and research activities (level 3).</p>	<p>Recognition of ports as central multimodal transport hubs that are crucial for increasing environmentally friendly transport modes, such as inland waterways</p> <p>Emphasising the potential role of ports in the mission field in making urban mobility climate neutral</p> <p>Identifying the benefits of ports as experimental spaces for innovation and research activities, as they combine different modes of transport, they are embedded in the urban logistics network and thus connect various stakeholders and also act as key interface of international and regional transport</p>	<p>Action 1-3: 09/2022 – 12/2030</p>
	<b>SK</b>	<b>Strategic plan for the development of transport in the Slovak Republic until 2030</b>		
2	SK	Minimum level of investment in the development and modernization of	Investments in the development and modernization of waterway infrastructure and their components have recently been made to a minimal	2030

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
		waterway infrastructure and its components	extent, mainly due to insufficient financial resources and due to ambiguities regarding competencies in the field of waterway development and modernization.	
2	SK	Insufficiently completed parts of waterways	Part of the waterway are considered to be the places where vessels stand in or out of ports, huts, locks, lanes, docks, port mooring facilities, bank fortifications, regulatory structures, signal signs, waterways, waterway protection zones, water parts, shore modifications and waterfront ports. However, the construction of only basic and necessary components has been solved in this area for a long time and it is necessary to complete it, also with connection to the consumption of electricity and drinking water where it is desirable and appropriate. Those parts of the waterways that are built should be reconstructed and a maintained access road provided.	2030
1	SK	Inadequate operational condition of the Váh Waterway	<p>Setting the principles of sustainable financing of the transport sector</p> <p>Periodic preparation of transport infrastructure maintenance plans</p> <p>The process of preparation and implementation of development projects, including related activities</p> <p>Completion and ongoing maintenance of databases of individual subsectors Regular updates of strategic and development documents</p>	2030
5	SK	<p>Improving the Slovak public ports system</p> <p>Modernization in progress, however not completed</p> <p>Property and administrative relations not yet settled</p>	<p>By 2030, it is planned to modernize two TEN-T ports on the Danube River: Bratislava and Komárno. The priority project is the modernization of the port of Bratislava</p> <p>Continue with initiated activities (feasibility studies, clarification of property and administrative relations) according to agreed schedule and actions</p>	2023



Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
		Reconstruction and modernization of the locks of the Gabčíkovo waterworks	The right lock of the Gabčíkovo Waterworks has been modernized since 2019 and is in operation. The modernization of the left lock is planned.	2022
1	HU	<b>National Port Development Master Plan</b> low utilization of port capacity	Education training, Technological modernization, Financing, Investment promotion, industrial establishment, Legislation, concepts, Infrastructure development, Career model, Digitalization, automation, Sustainability, Market research, innovation	12/2030
	HU	<b>National Transport Infrastructure Development Strategy (2014 – 2050)</b>		
1	HU	low-level navigation conditions on the Danube	<p>Ro-La transport - Long-distance, international road traffic can be diverted to rail and waterways, only if the cost levels of the latter modes over the entire supply chain, the reliability, delivery time and flexibility of the service chain approach the road</p> <p>Increase the size of port areas with infrastructure for multimodality by 8,000 m<sup>2</sup> in 2030 and 15,000 m<sup>2</sup> in 2050.</p> <p>Increase the length of water infrastructure equipped with intelligent transport system to 378 km in 2030.</p>	12/2050
	HU	<b>National Danube Water Transport Strategic Plan (2019)</b>		
1	HU	No meaningful dialogue between sectors, interest groups. Based on the economic and transport policy ideas and the resolutions of the professional organizations and enterprises of inland waterway transport, despite the efforts to develop the Danube waterway is being expressed in contradictory opinions in other fields (primarily in the field of environmental protection).	<p>Action: open conferences, public data</p> <p>Implementation strategy: common planning with all the stakeholders</p> <p>Timeline: no exact time horizon within the strategy</p> <p>Participants: NGOs, freight forwarders, ministries, citizens, environment protecting activists, port owners and operators</p>	no exact time horizon within the strategy

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
	HU	<b>National Shipping Strategy (2012)</b>		
4	HU	Very few logistics centres settled by the Danube	<p>Construction and modernization of berths</p> <p>Cargo ports:</p> <ul style="list-style-type: none"> <li>• Trimodal ports with logistics centre (rail and road connection)</li> <li>• Transshipping ports (road connection)</li> </ul> <p>Intermittent loading bays (mainly for agricultural products)</p>	no exact time horizon defined in the strategy
	HU	<b>Budapest Agglomeration Railway Strategy (2020 - 2040)</b>		
1	HU	Budapest-centric network, but no more physical capacity	<p>The expansion of the southern ring railway is the first step to solve the bottleneck with a frequency of 10-15 minutes per direction, new transit connections, direct, cross-Danube, diameter suburban services.</p> <p>Tunnel connecting Kelenföld, Déli and Nyugati railway stations</p> <p>Suburban and urban railway network – rail service crossing Budapest</p> <p>Long-distance network – Budapest is not a terminus, long-distance trains can cross the country</p>	2040
	HU	<b>Mid-term Logistics Strategy (2013 – 2020)</b>		
1	HU	<p>a) weakness of HR</p> <p>b) weakness of stakeholders</p> <p>c) weakness of node infrastructure</p> <p>d) weakness of IT infrastructure</p> <p>e) weakness of international relations</p> <p>f) weakness of networking and cooperation</p> <p>g) weakness of R&amp;D</p>	<p>a) high-quality, practical, interdependent, and interoperable educational activities in secondary and higher education and vocational training tailored to company needs</p> <p>b) developing the logistics role and culture of Hungarian SMEs and contribute to the success of the sector through a coordinated effort by the private and civil sectors and the public administration</p>	2020

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
			<p>c) Addressing the Budapest-centric nature of node infrastructure</p> <p>d) Facilitate in-house IT developments to reduce logistics transaction costs in the SME sector</p> <p>e) Substantially promote the development of networking and cooperation in the logistics service sector</p> <p>f) Development of logistics knowledge bases, flow and use of knowledge – support of less common but essential forms of innovation for rationalization of logistics processes (process and organizational innovation solutions) – harmonization of research supply and corporate innovation needs (R&amp;D gap), support for innovation networking.</p>	
	<b>HR</b>	<b>River Transport Development Strategy 2008-2018</b>		
1	HR	Gap 1: lack of continuity of strategic documents	Ensure that strategic documents are prepared on time in order not to have a few years gap between them.	one year before expiration of the actual strategy
1	HR	Gap 2: lack of project defining and financing sources availability due to strategy missing	Ensure that strategic documents are up to date in order to enable financing background of the specific projects.	one year before expiration of the actual strategy
	<b>HR</b>	<b>Mid-term Development Plan for Inland Waterways and Ports (2009 – 2016)</b>		
2	HR	Gap 1: Avoid projects that are obstacle to one another or many other projects	Define priority projects and try to define are any of those projects and their implementation uncertain and how (risk defining).	2022
2	HR	Gap 2: Mid-term strategic documents should be adjustable to real needs	Foresee the risks for each project/objective realization, measures to prevent them.	2022
	<b>HR</b>	<b>National Program for the Railway Infrastructure for the Period 2009 - 2016</b>		

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
1	HR	Gap 1: overlap of the strategic projects from different transport sectors	To strictly define which project are priorities.	2022
	<b>HR</b>	<b>Construction and Maintenance of Public Roads Program 2017-2020</b>		
2	HR	Long periods for significant road connections realization	To recognize the priorities and significance of specific projects which have the influence on multimodal chains	2022
2	HR	Transport Master Plan of the East Croatia Functional Region Wrong information regarding inland navigation sector	When preparing such documents consult authorities from each specific transport field for correct information	when new version is being prepared
	<b>RS</b>	<b>Strategy of railway, road, inland waterway, air and intermodal transport development in the Republic of Serbia 2008 - 2015</b>		
1	RS	Gap 1: Lack of coherent and relevant policy or strategy to guide the development of the transport sector in Serbia (outdated Strategy) - Level 1	The Republic of Serbia needs to develop and adopt a new transport Strategy.	2023
1	RS	Gap 2: Insufficient integration between the individual transport modes (railway, road, inland waterway) - Level 1	Form a cooperation committee, intersectoral coordination board or any other formal cooperation body in order to avoid any conflict of interests and to coordinate strategies and actions and acknowledge this need in relevant legislation.	2023
2	RS	Gap 3: Non harmonised national and international (EU) legal framework - Level 2	Suitable framework must be established to take care of European tasks for traffic and transport.	2023
2	RS	Gap 4: There is no concept of regional development and connection with trading partner countries - Level 2	Create a concept of regional development and connect with trading partner countries.	2023
	<b>RS</b>	<b>Strategy on Development of Waterborne Transport of the Republic of Serbia for the period from 2015 to 2025</b>		
2	RS	Gap 1: lack of information on the availability of transshipment capacities in ports and insufficient	Present and promote ports on inland waterways in the Republic of Serbia on	2023

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
		information on the benefits of water transport - Level: 2	international level and educate potential domestic economic entities.	
1	RS	Gap 2: lack of harmonised international administrative procedures, including border crossing, and corresponding national/international IWW regulations for implementation of the digitalisation of these processes - Level: 1	Organise experts from different transport models which make analysis relevant to the EU legal framework and give recommendations for harmonisation of national IWW regulations by implementing simplified administrative procedures.	2023
1	RS	Gap 3: lack of awareness that inland ports are crucially important elements of the transport network - Level: 1	Lobbying for interests of ports with relevant institutions of the EU, supported by various impact assessments and other supportive studies on inland ports.	2023
1	RS	Gap 4: lack of intersectoral coordination and cooperation in port and spatial planning - Level 1	Form a permanent body/commission/board of relevant decision-making organisations that will coordinate their activities and safeguard mutual interests in spatial planning and strategic economic/industrial planning in relevant transport strategies and policies.	2023
2	RS	Gap 5: lack of attention to automation in inland port operations - Level: 2	Establish an appropriate funding mechanism or adapt the existing ones so as to include and prioritise research and innovation activities in the automation of port operations and get involved in policy making processes.	2023
	<b>RS</b>	<b>National Program for public rail infrastructure</b>		
2	RS	Gap 1: The National Program for the Development of Railway Infrastructure is outdated - Level: 2	Republic of Serbia needs to develop and adopt a new National Program for the Development of Railway Infrastructure	
1	RS	Gap 2: Lack of intersectoral coordination between strategies in water and railway transport - Level: 1	Secure that inland ports are clearly identified and mentioned in the new regulation for railway transport.	
1	RS	Gap 3: Lack of connections or rail infrastructure capacities in river	Get involved in the elaboration of the new transport strategies in the early	

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
		ports in the Republic of Serbia - Level: 1	phase and/or during the public consultations.	
	<b>BG</b>	<b>Integrated Transport Strategy for the period until 2030</b>		
1	BG	Gap 1: Lack of investments in construction and development of river port facilities - Level: 1	Concrete measures for the development of facilities in the ports of Vidin and Silistra	Modernization and development of the network of lower class roads could be achieved in the short term (by the end of 2023).
1	BG	Gap 2: Insufficient measures in support of road infrastructure in port areas - Level: 1	Modernization and development of the network of lower-class roads in all regions along the Danube River and construction of the Ruse – Veliko Tarnovo motorway.	All other actions are to be implemented throughout the horizon of the strategy (until 2030).
2	BG	Gap 3: Insufficient measures in support of railroad infrastructure and intermodality in port areas - Level: 2	Construction of a railway connection with the town of Tutrakan.	
	<b>BG</b>	<b>Transport Connectivity programme 2021 – 2027</b>		
3	BG	Gap 1: Insufficient investments for the development of railroad infrastructure in river port areas - Level: 3	Modernization and rehabilitation of railway stations in port cities and of the rail lines Vidin – Sofia, Ruse – Gorna Oryahovitsa and Ruse – Varna.	Rehabilitation of first, second and third class roads in the regions of Vidin, Montana and Vratsa could be achieved in the short term (by the end of 2023).
4	BG	Gap 2: Insufficient investments for the development of road	Rehabilitation of first, second and third class roads in the provinces of Vidin, Montana and Vratsa.	Modernization and rehabilitation of railway

Gap level	Country	Gap	Action (recommendation) to close the gap	Timeline for actions
		infrastructure in river port areas - Level: 4		lines and stations should be considered for completion throughout the programming period (2021 – 2027).
	<b>RO</b>	<b>The Government Program for the period 2021 – 2024</b>		
3	RO	More focus on the maintenance of the IWT infrastructure	Maintenance plans approved at the level at the companies responsible for the administration of transport infrastructure and the Strategic institutional plan at the level of MTI	continuously
	<b>RO</b>	<b>General Transport Master Plan</b>		
1	RO	Naval Transport Strategy	Elaboration of the Naval Transport Strategy	Action 1: 2022 - 2023
1	RO	Implementation of strategies through development projects	<p>Action 1: institutional capacity to be improved and stability in management and staff</p> <p>Action 2: improvement of the process of obtaining all necessary approvals</p> <p>Action 3: Contacting companies which are able to finalize the works in time</p>	<p>Action 1: continuously</p> <p>Action 2: applyingmDirective (EU)</p> <p>2021/1187 ("Smart TEN-T") – 10.08.2023</p> <p>Action 3: during the public procurement procedure for technical designs and works</p>

**Table 4: National transport gap analysis summary for the Danube region**

## 7. European Transport Policies, Strategies and Programmes with existing or potential influence on ports, identified gaps and actions (recommendations) to close them

EU transport policy helps keep the European economy moving by developing a modern infrastructure network allowing the transport of people and goods to be quicker and safer, while at the same time promoting sustainable and digital solutions. Although having the same origin, many European transport related policy documents are not always fully aligned with other existing documents or legislation and many of them do not take into account the implications of their own provisions on the functioning and development of other related transport modes or initiatives and activities.

### 7.1 European transport development strategies with potential influence on ports

European transport development strategies, policies and programmes identified to have substantial or more than marginal influence on ports are listed in the following table.

European transport policies, strategies and programmes	Mentioning ports	Not mentioning ports, but could or should affect ports	Low influence on ports	Medium influence on ports	Strong influence on ports
White Paper 2011 – Roadmaps to a single European transport area	X				X
Trans-European Transport Network Policy	X				X
The Sustainable and Smart Mobility Strategy	X				X
NAIADES III Action plan	X				X
The European Rail Network for Competitive Freight	X			X	

**Table 5: Listing of EU transport development strategies and their influence on ports**



## 7.2 Gaps in European transport development strategies, actions (recommendations) to close the gaps

Below table summarizes the gaps and actions to close the identified gaps.

Gap level	Country	Gap	Recommendation to close the gap	Timeline for actions
	<b>EU</b>	<b>2011 - White Paper on transport – Roadmap to a single European transport area</b>		
1	EU	Gap 1: lack of awareness that inland ports are crucially important elements of transport network - Level: 1	Lobbying for interests of ports with relevant institutions of EU, supported by various impact assessments and other supportive studies on inland ports.	09/2022 – 12/2030 or until fulfilled.
2	EU	Gap 2: lack of market access regulation for inland ports. - Level: 2	Get involved in the elaboration of the new transport policy/roadmap in the early phase and/or during the public consultations.	
1	EU	Gap 3: lack of intersectoral coordination and cooperation in port and spatial planning - Level: 1	Form permanent body/commission/board of relevant decision-making organizations that will coordinate their activities and safeguard mutual interests in spatial planning and strategic economic/industrial planning in relevant transport strategies and policies.	
2	EU	Gap 4: lack of attention to automation and automation in inland port operations. - Level: 2	Establish an appropriate funding mechanism or adapt the existing ones so as to include and prioritize research and innovation activities in the automation of port operations and get involved in policy making processes.	
	<b>EU</b>	<b>Trans-European Transport Network [TEN-T] policy</b>		
1	EU	Gap 1: lack of recognition of inland ports as cross-border sections of the transport network - Level: 1	Secure full recognition of inland ports as cross-border sections of the inland waterway transport network to obtain prioritization in transport infrastructure development.	09/2022 – 12/2030 or until fulfilled.

Gap level	Country	Gap	Recommendation to close the gap	Timeline for actions
1	EU	Gap 2: lack of recognition of inland ports as poly sectoral hubs of transport, industry, logistics and energy where sustainable production and cargo operations take place. - Level: 1	Include inland ports in the new TEN-T policy as poly sectoral hubs, like for maritime ports, in an appropriate and unambiguous article of the new regulation.	
1	EU	Gap 3: lack of focus on development of inland ports as decarbonization hubs. - Level 1	Secure clear mentioning of inland ports in the new regulation acknowledging the exact same role of inland ports in inland waterway transport and short sea shipping as maritime ports have in short sea shipping.	
	<b>EU</b>	<b>Sustainable and Smart Mobility Strategy</b>		
1	EU	Gap 1: inland ports are not fully treated as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and alternative fuels supply - Level: 1	Pursue full endorsement of inland ports, on policy and regulatory levels, as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and alternative fuels supply.	09/2022 – 12/2030 or until fulfilled.
2	EU	Gap 2: incentive schemes for greening of inland ports are scarce and insufficient - Level: 2	Analyse the regulatory framework for all types of similar incentives, existing and potential, design and propose different incentive schemes for different levels of greening activities in ports.	
	<b>EU</b>	<b>NAIADES III Action plan</b>		
2	EU	Gap 1: Priority in projects given to undefined “dedicated terminals” - Level: 2	Clearly define the term “dedicated terminals” to neutralize any ambiguous interpretations and misleading of potential project proponents.	09/2022 – 12/2023
1	EU	Gap 2: Quality of inland port infrastructure is not specified and no criteria and appropriate KPIs are	Clearly define the quality of inland port infrastructure, the criteria for quality and design appropriate KPIs to measure the compliance of ports’	

Gap level	Country	Gap	Recommendation to close the gap	Timeline for actions
		identified to assess the quality of inland port infrastructure - Level: 1	infrastructure with the targeted quality criteria/levels.	
3	EU	Gap 3: No harmonized European inland waterways rules on preventing pollution from ships - Level: 3	Commence work on common regulatory framework for rules on prevention of pollution of inland waterways by ships.	
2	EU	Gap 4: Lack of recognition of inland ports' role in creating "Smart inland waterway transport" and adequate financial instruments or call topics - Level: 2	Secure full and unambiguous recognition of inland ports' role in creating "Smart inland waterway transport" and provide relevant funding instruments and schemes for appropriate project and initiatives.	
	<b>EU</b>	<b>The European Rail Network for Competitive Freight</b>		
3	EU	Gap 1: lack of coordination between the national rail infrastructure managers and port authorities in terms of rail connections and port internal rail infrastructure and recognition of the need for such coordination in the Regulation. - Level: 3	Form a cooperation committee, intersectoral coordination board or any other formal cooperation body in order to avoid any conflicting interests and to coordinate strategies and actions and acknowledge this need in relevant legislation.	09/2022 – 12/2023
		Gap 2: determined port rail infrastructure is in danger of being left out of the scope of EU legislation. - Level: 2	Ensure that the port rail infrastructure remains an integral part of the TEN-T rail network and that it remains within the scope of EU legislation and thus preserve its importance.	
		Gap 3: Specific position of port rail infrastructure in terms of charging is not recognized. - Level: 1	Ensure that the autonomy of charging for port infrastructure, including the port's rail infrastructure is respected as laid out in Port Services Regulation (PSR).	

**Table 6: Gap analysis summary for selected European Union transport policies**

## **8. Overview of the analysed development strategies, policies and programmes on national and supranational (EU) level identified to have determined influence on ports**

Below table summarizes the gaps and actions to close the identified gaps.

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
	<b>Gaps summary and recommendations on the basis of economic development related strategies</b>					
Recovery and Resilience Plan 2020 – 2026 / AT	N/A	N/A	N/A	No gaps. <sup>5</sup>	N/A	N/A

<sup>5</sup> At the specific request of the Project Partner EHO.

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Spatial Development Concept 2030 / AT	N/A	N/A	N/A	No gaps. <sup>6</sup>	N/A	N/A
Vienna 2030 – Economy & Environment	N/A	N/A	N/A	No gaps. <sup>7</sup>	N/A	N/A

<sup>6</sup> At the specific request of the Project Partner EHOÖ.

<sup>7</sup> Ibid.

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Investment Plan of the Slovak Republic for the years 2018 - 2030 Pilot Version / SK	Market share increase	The share of water transport in the total volume of traffic has been low for a long time, and there is no gradual improvement in this unfavourable situation.	4.5% market share for water transport	Low share of water transport on the market	<p><u>Action 1:</u> Improve navigation parameters and eliminate bottlenecks on the Danube River.</p> <p><u>Action 2:</u> Modernize the public ports of Bratislava and Komárno</p> <p><u>Action 3:</u> Complete the Váh waterway</p>	<p><u>Action 1:</u> 2030</p> <p><u>Action 2:</u> 2030</p> <p><u>Action 3:</u> 2030</p>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Economic Policy Strategy of the Slovak Republic until 2030 / SK	Human Capital Development	Key Area 1 - Human Capital Development: Shortage of skilled workers, many retiring in near future, lack of professional learning opportunities	- Efficient ties between education and labour market	Gap 1: Lack of human capital in waterway transport	<p><u>Action 1:</u> Streamline and simplify the vocational education and training system in regional education.</p> <p><u>Action 2:</u> Take measures to improve the quality of higher education and increase its relevance to market needs</p> <p><u>Action 3:</u> Reassess the effectiveness of conditions for managed labour immigration from abroad with their subsequent adjustment to the next period in a way that suits the economic interest of the Slovak Republic and its population</p>	<p><u>Action 1:</u> 2030</p> <p><u>Action 2:</u> 2030</p> <p><u>Action 3:</u> 2030</p>



	Environmental and Energy Efficiency of the Economy	Key Area 3 - Environmental and Energy Efficiency of the Economy: Slow progress in the implementation of eco-innovations, most of the vessels, facilities and objects in the port are obsolete and in technically unsuitable state.	- Economy policy bringing more value than GDP	Gap 2: Underutilized potential of water transport	<p><u>Action 1:</u> Diversify sources and transport routes for natural gas, oil and electricity where necessary in terms of energy security, economic efficiency and competitiveness of energy consumers</p> <p><u>Action 2:</u> To support the use of domestic renewable energy sources, biomass and hydropower potential of the Slovak Republic, taking into account the requirements of air quality (especially in the case of the use of biomass).</p> <p><u>Action 3:</u> Strengthen the construction, development and efficiency of transport infrastructure, public passenger transport, non-motorized transport and electrified public transport in order to reduce energy efficiency and reduce emissions and improve air quality.</p> <p><u>Action 4:</u> Stimulate the development of technologies and infrastructure using alternative forms of fuels in passenger motor transport to a competitive and affordable level e.g. in the field of electromobility.</p>	<p><u>Action 1:</u> 2030</p> <p><u>Action 2:</u> 2030</p> <p><u>Action 3:</u> 2030</p> <p><u>Action 4:</u> 2030</p>
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Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Strategy of the Environmental Policy of the Slovak Republic until 2030 / SK	Mitigation of climate change impact and strengthening of air protection	Issues with waste management, air quality and protection of habitats and species, especially in forest, meadow and wetland ecosystems.  Lowered air quality for long period of time.  High concentrations of nitrogen dioxide and benzo pyrene.	Reduction of greenhouse gas emissions, protection and revitalization of ecosystems, reduction, and mitigation of risk of floods and soil erosion	Gaps in Climate change and air protection	<u>Action 1:</u> Implement sustainable transport solutions  <u>Action 2:</u> Build green infrastructure	<u>Action 1:</u> 2030  <u>Action 2:</u> 2030
	Strengthening flood protection	Same as above	Protection of life and health of people, their property, the environment, cultural heritage and economic activities against floods, drought and water scarcity	Gap in Flood protection	<u>Action 1:</u> Increase the use of green measures  <u>Action 2:</u> Not allowing construction in areas at risk of floods	<u>Action 1:</u> 2030  <u>Action 2:</u> 2030
	Strengthening clean air policy	Same as above	Emission reduction compared to 2005 - SO <sub>2</sub> by 82%, NO <sub>x</sub> by 50%, NMVOC by 32%, NH <sub>3</sub> by 30% and PM <sub>2.5</sub> by 49%	Gap in Clean air policy	<u>Action 1:</u> Gradually reduce electricity production from coal  <u>Action 2:</u> Increase the share of low-emission transport	<u>Action 1:</u> 2030  <u>Action 2:</u> 2030

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Smart concept of regional development of the Nitra self-governing region until 2027 / SK	Implementation of innovative smart approaches, methods, technologies	n/a	<ul style="list-style-type: none"> <li>-Increased intensity of the use of freight shipping</li> <li>-increased number of businesses located</li> <li>-increased number of visitors</li> <li>-improving infrastructure for passenger and freight transport</li> <li>-better connection of shipping to other modes of transport</li> <li>-improving the quality-of-life environment.</li> </ul>	Use of the Danube waterway (as a cross-border link), including smart tourism	<u>Action 1</u> (recommendation to close the gap): Transformation of the port of Komárno - smart logistics center Komárno	<u>Action 1:</u> 2027

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Clean Development Strategy 2020-2050 / HU	Reaching climate neutrality by 2050	The existing economy system is unsustainable, economic development leads to the increasing greenhouse gas emissions which contributes to the global climate change.	The green economy development preserves natural resources, creates new jobs, while does not contribute to climate change.	<u>Gap 1:</u> The readiness of green technologies <u>Gap 2:</u> Who pays the transition? <u>Gap 3:</u> Cooperation between ports.	<u>Action 1:</u> Assessing and financing future technologies <u>Action 2:</u> Creation of an Innovation Fund for ports: <u>Action 3:</u> Best practice sharing and creation of an online platform	<u>Action 1:</u> 2023-2024 elaborating assessments – 2025-2030 prototyping <u>Action 2:</u> In 2023 assessment of investment needs and in 2024-2030 establishing an innovation fund. <u>Action 3:</u> Creation and operation of the online platform in 2023-2030, study trips in 2023-2024

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Development and Territorial (Spatial) Development Concept 2014-2030 / HU	Hungary is one of the leading economic and intellectual centres in Europe	Worsening demographic status, the challenged health and education infrastructure while Hungary faced economic crisis in 2008-2009.	Increasing the employment rate, securing economic growth without overusing our natural resources	<p><u>Gap 1:</u> How can infrastructural development be more (environment) efficient</p> <p><u>Gap 2:</u> What path should be followed in technology development?</p> <p><u>Gap 3:</u> Unharmonized port development</p>	<p><u>Action 1:</u> Creation of an environment impact assessment and feasibility on market ready new technologies</p> <p><u>Action 2:</u> future technologies should be analysed, prototyped</p> <p><u>Action 3:</u> Harmonising port development</p>	<p><u>Action 1:</u> 2023-2024 elaborating assessments – 2025-2030 prototyping</p> <p><u>Action 2:</u> 2023-2024 elaborating assessments – 2025-2030 prototyping</p> <p><u>Action 3:</u> 2023-2024 creation/review strategies and in 2025-2030 project generation and implementation</p>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Port Development Master / Plan Strategy 2020-2030 / HU	Increased share of ports in the transportation sector	Infrastructural, human resource and legal obstacles in front of a comprehensive port development	Increase the economic weight of waterborne transportation and ports.	<u>Gap 1</u> : Undescribed role of ports in climate neutrality	<u>Action 1</u> : Defining the place of ports in the future green economy by revising the master plan and prototyping.	2023-2024 revision of the Master Plan and in 2025-2030 implementation of prototypes and experimental systems
Water Management Strategy until 2038 / HR	List the objectives	Water Management Strategy (Official Gazette 91/2008) (further: WMS) was prepared in 2009 and it covers period until 2038. It is a long-term strategic document which gives the vision, mission, goals, and assignments of the State policy in the field of water management. It gives strategic commitments and directions towards water management development. It gives the	Strategic documents from water and inland sector should be harmonized in the period of their validity. Projects that are of interest for both, water and inland navigation sector should be up to date and coordinated.	Cross sectoral strategic documents validity period harmonization	Harmonization of the strategic documents of the same level that could influence one another and harmonization of their validity period.	2031-2032

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
		framework for strategies and zoning plans preparation, environmental protection, nature protection and other sectors which depend on waters. Water management relates to socio-economic environment.				
		Water Management Strategy (Official Gazette 91/2008) (further: WMS) was prepared in 2009 and it covers period until 2038. It is a long-term strategic document which gives the vision, mission, goals, and assignments of the State policy in the field of water management. It gives strategic commitments and directions towards water management development. It gives the framework for strategies and zoning plans preparation, environmental protection, nature protection and other sectors which depend on waters. Water management relates to	Strategic documents from water and inland sector should be harmonized in the period of their validity. Projects that are of interest for both, water and inland navigation sector should be up to date and coordinated.	Methodology for sector specific coordination projects	Active involvement of all sectors during the strategic documents preparation to avoid specific projects overlapping.	For all further documents

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
		socio-economic environment.				



Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Agricultural Strategy 2020-2030 / HR	B1 - Backing of the agricultural solutions that are acceptable for environment, climate & animal welfare; C4 - Development of the agricultural food logistic centres and E1 - Increase of the rural areas' connection with market.	<p>Strategy is still under preparation, procedure is ongoing.</p> <p>Agricultural Strategy (further: ACS) is based on four basic objectives: increase of productivity and climate change resistance of agricultural production; competitiveness of agricultural and food sector; renewal of the natural economy and improvement of the life conditions in rural areas and investments encouragement within the agricultural and food sectors.</p> <p>The common vision for the agricultural sector is to: increase the production of the higher amounts of the nutritious and high-quality food on competitive prices, sustainable management of the natural resources in changeable climate conditions and to contribute to employment growth in rural areas.</p>	ACS in its objectives should foresee development in the connection with the transport sector to use the most eco-friendly and the cheapest modes of transport. It should make the preconditions for state-of-the-art infrastructure for agricultural products and logistic centres within the ports building in the close connection with environmental welfare.	Foster the development by using the more environmentally friendly and the cheapest modes of transport	Include and stimulate agricultural sector development to encourage development of the logistic hubs in ports, to use the most eco-friendly mode of transport. Plan and include within objectives B1; C4; E1 -	During the preparation

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Strategy for Spatial Development until 2030 / HR	international legal border system implementation; diverting cargo to rivers; future Danube-Sava Canal start to be foreseen; enable touristic navigation on rivers.	Main projects of the river sector are also named in the SPDS: renewal of the international waterways; New Port East Vukovar I phase; research of the inland navigation development on Sava, Kupa and Drava.	SPDS should be the basis for the spatial planning documents on national and regional level. It should define main objectives for each sector and for each specific field of the State interest - that public river ports areas are - which is stated by the Inland Navigation and Ports Act.	Lack of cross-sector harmonization	update the strategic projects list and harmonize all strategic documents that have cross-sector impact	2028-2030 - expected new SPDS and Transport Strategy preparation
Tourism Strategy until 2020 / HR	Objectives??	Tourism Strategy (Official Gazette 55/13) represents the basic development document for tourism. It gives the status quo analysis with key development principles defining, gives the vision and strategic goals and assignments which are to be reached until 2020. In the chapter that refers to transport infrastructure inland navigation or passenger ports infrastructure is not mentioned	To recognize river cruising and river nautical tourism as a potential and to prepare the basis for their development in strategic documents.	Defining river cruising and river nautical tourism as touristic potentials	when preparing the new Tourism Strategy reconsider other touristic potentials connected with inland navigation and rivers as a potential	2022

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Vukovar-Srijem County Development Strategy until 2020 / HR	3.2.3	<p>Within the strategic objective Modern infrastructure and environmental protection one of the projects identified is 3.2. Integration and Modernization of the Transport Infrastructure. Two separate measures have been identified as part of this objective: 3.2.3 Maintenance, building and modernization of the inland waterways and water transport development and 3.2.4 Development of the multimodal infrastructure and transport.</p> <p>As part of the 3.2.3 Measure project of the Upgrade and Reconstruction of the Infrastructure for the Vukovar Port - New Port East. This project is no longer valid, at least not in that form.</p>	To have updated County strategic development documents with updated list of projects.	lack of state and regional harmonization	update the strategic projects of relevance for the County and harmonize all strategic documents that have cross-sector impact	2022-2023

<p><b>Draft of Spatial plan of the Republic of Serbia from 2021 to 2035 / RS</b></p>	<p>reducing territorial disparities in the level of development,</p> <p>mitigating negative demographic trends;</p> <p>prevention of fragmentation and disintegration of space,</p> <p>integration of less developed environment, in parallel with further development of the most developed areas;</p> <p>traffic, infrastructure, economic and cultural connection of Serbia with the neighbouring / Balkan, European and wider environment;</p> <p>encouraging the development of more promising rural areas;</p> <p>stopping and legalizing illegal construction wherever possible;</p> <p>limiting the expansion of construction areas / lands of urban settlements and centres;</p> <p>reassignment of brownfield sites;</p> <p>preservation of regional, urban and rural identity;</p> <p>development and gradual application of circular production / economy; protection of cultural and natural heritage and natural resources (agricultural land, forests, water resources, biodiversity).</p>	<p>The Spatial Plan of the Republic of Serbia from 2021 to 2035 is the main planning document of spatial planning and development in the state, which determines a long-term strategic framework for the directing and management of spatial development. It is carried out through regional spatial plans, spatial plans for special purpose areas and urban plans. The time horizon is 2035, but the long-term strategy, conception and certain planning solutions of spatial development are planned in the long term and not limited to the time horizon of the planning document.</p>	<p>The vision of long-term spatial development of the Republic of Serbia is more balanced developed territory of the Republic of Serbia on the principles of economic, social and territorial cohesion, with a higher and more uniform quality of life and environment, preserved identity and diversity of the space that is adapted to climate change. The general goal is sustainable and more balanced spatial development, mitigation of regional differences and greater degree of territorial cohesion in order to improve the quality of life, slow down unfavourable demographic processes and create conditions for young people to stay in the country, while improving competitiveness, accessibility, strengthening territorial capital and preserving activities in space and settlements on climate change.</p>	<p><u>Gap 1:</u> Insufficient and uneven connection, accessibility and equipment of parts of the territory with traffic, communal and social infrastructure</p> <p><u>Gap 2:</u> Great regional differences in the level of industrial development, there is a spatial polarization and dominant concentration of industry in the metropolitan areas</p>	<p><u>Action 1:</u> Further development of transport infrastructure – roads, railways, inland waterways.</p> <p><u>Action 2:</u> Stronger regional competitiveness and regional economic development, more balanced regional economic and social development, reduced share of underdeveloped areas;</p>	<p>2025-2030</p>
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<p><b>The Strategy for Agriculture and Rural Development of the Republic of Serbia from 2014 to 2024 / RS</b></p>	<p>In an effort to trace the direction of future reforms as clearly as possible of the agricultural sector as part of the external and internal challenges it faces, as well as to define measures and activities for the reconstruction and activation of development potential of rural areas, the Ministry of Agriculture of the Republic of Serbia initiated the development of a strategic document. The result is the Strategy of Agriculture and Rural Development of the Republic of Serbia for the period 2014 - 2024, which as a basic and long-term strategic document which defines the goals, priorities and frameworks of political and institutional reforms in the field of agriculture and rural development</p>	<p>This document will be established the foundations of the new agricultural policy, defined in accordance with the principles of modern public policy management and on the line of a clear commitment of the Ministry of Agriculture, Forestry and Water Management to gradually adopt the model of European support for agriculture.</p>	<p>To successfully address many challenges, the Strategy aims to define directions of future development of agriculture and food industry, based on the concept of sustainable development, which affirms the preservation of the environment and sustainable management of natural resources;</p>	<p><u>Gap 1:</u> The document does not cover the subject of transport of agricultural goods by inland waterway transport</p> <p><u>Gap 2:</u> Lagging in technological development compared to the competing countries</p> <p><u>Gap 3:</u> Inefficient confrontation of the agricultural sector with the effects of climate change</p> <p><u>Gap 4:</u> The need to increase the efficiency of the food chain and competitiveness of the agri-food sector</p>	<p><u>Action 1:</u> Include the chapter regarding the possibilities of transport of agricultural goods by inland waterway transport.</p> <p><u>Action 2:</u> Improving the competitiveness of the agri-food sector requires support for restructuring, development and innovation along the entire food chain.</p> <p><u>Action 3:</u> monitoring climate change, creating adaptation measures and adequate measures aimed at reducing greenhouse gas emissions from agricultural production; improvement and adaptation of production technology; technical improvements of land, facilities and equipment; raising awareness of climate change, its consequences and needs for their solution.</p> <p><u>Action 4:</u> Operational goals leading to the realization of this priority are: development of new services in the food chain and strengthening of logistics food production infrastructure; increasing the capacity of agricultural holdings to join global market chains (supply trade chains); strengthening the motivation of producers for various forms of association; strengthening the capacity of cooperatives to become financial, market and advisory service of cooperatives; strengthening the visibility and recognizability of domestic products on the market; strengthening the export performance of the agricultural sector; strengthening horizontal and vertical links in the production chain, based on market principles; reducing the presence of the gray economy; strengthening and development of market organizations.</p>	<p>2024</p>
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Industrial policy strategy of the Republic of Serbia from 2021 to 2030 / RS	<p>The implementation of the Strategy will allow for raising the technological level of the industry and its transformation towards digitalisation and automatization, raising the contribution of scientific-technical and innovative solutions, as well as the total volume of investments in industry, while securing balance in the structure and quality of the investments.</p>	<p>Implementation of strategic goals pertaining to the industrial development of the Republic of Serbia by 2020 encompassed delivery of numerous measures, with key measures being focused on the institutional framework building, business climate improvement, reduction in administrative and other barriers, formation of the national financial institution for industrial development, development of the knowledge-based society and lifelong learning, implementation of innovation, research and development and ICT application, aimed at strengthening the competitiveness of the economy, accelerated development of entrepreneurship, attracting foreign direct investments, sustainable regional development, faster implementation of restructuring and privatisation processes.</p> <p>Many products found in the market are the lower value-added products, which reduced the total value of industrial export. Export restructuring in direction of increasing the share of high domestic value-added products could have a positive effect on export and thus also on ports.</p> <p>The factors limiting certain sectors to use maximum export potentials also affect sector share in the total export value. These are often import duties on components, inadequate legislation and access to raw material in the export domain. Insufficient export subsidies.</p> <p>The existing infrastructure is not sufficiently developed to support economic model transformation, primarily current energy and utility infrastructure, unreliable and outdated infrastructure; industrial zones are often at a dissatisfactory</p>	<p>The overall goal of industrial policy is to raise the competitiveness of Serbian industry. This goal directly supports the achievement of the previously defined vision. Specifically, competitive Serbian industry significantly contributes to high sustainable economic growth, measured by the national GDP growth rate and better living standard of Serbian citizens, measured by the GDP level per capita.</p>	<p><u>Gap 1:</u> The document does not cover the subject of ports (i.e. establishing industrial zones in the hinterland of ports)</p> <p><u>Gap 1:</u> Still present infrastructure gaps</p> <p><u>Gap 2:</u> Major imbalance in the development level of different regions</p> <p><u>Gap 3:</u> Total volume of industrial investments, accompanied by the improved quality of investments</p> <p><u>Gap 4:</u> High share of low value-added products in exports</p> <p><u>Gap 5:</u> Technological structure of exports</p>	<p><u>Action 1:</u> Include the chapter regarding the establishment of industrial zones in the hinterland of ports</p> <p><u>Action 2:</u> Support to development and improvement of production processes via industrial institutional infrastructure projects. Support programme for development of infrastructure for the needs of industrial zones</p> <p><u>Action 3:</u> Balancing regional industrial development.</p> <p><u>Action 4:</u> Incentive programme for investments in industrial production. Adjusting the criteria for attracting industrial investments aimed at increasing the share of domestic gross value added.</p> <p><u>Action 5:</u> Identifying and stimulating export-oriented industrial sectors entailing higher stages of processing.</p> <p>Promotion of the Republic of Serbia as an investment destination open to new investments of domestic and foreign companies with higher value added.</p> <p><u>Action 6:</u> Identifying and stimulating export-oriented industrial sectors entailing higher stages of processing.</p> <p>Support programme for industrial companies to enter</p>	2030
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Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
		level of utility infrastructure development.			supplier chains of multinational companies.	
National Recovery and Resilience Plan/ BG	To facilitate economic and social recovery from the crisis caused by the COVID-19 pandemic and at the same time to lay the foundations for a green and digital transformation of the economy.	The plan includes a set of measures and reforms in the areas of innovations, connectivity, social inclusion and management of natural resources.	The plan should bring attention to the need of investments in the development and modernisation of river port facilities and in the development of road and railroad infrastructure in the area of ports.	<p><u>Gap 1 (level 1)</u>: Lack of focus on port development</p> <p><u>Gap 2 (level 4)</u>: Insufficient attention to road infrastructure in port areas.</p>	<p><u>Action 1</u>: Amendments in subchapters Transport Connectivity and Digital Connectivity. Use the plan as an opportunity to update other strategies.</p> <p><u>Action 2</u>: Plan investments for the completion of the Hemus motorway, and for the improvement of the network of lower class roads in the Danube region.</p>	<p><u>Short-term actions</u> (amendments in the plan): in the first quarter of 2022 or before the plan is officially approved by the EU.</p> <p><u>Long-term actions</u> (updating existing transport strategies): throughout the period of implementation of the plan.</p>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Strategy for Small and Medium-sized Enterprises 2021-2027/BG	The strategy sets out the government's vision for supporting small and medium-sized companies.	The strategy achieves its goals for support of SME through six areas of impact: entrepreneurship, market access, digitalization, access to finance and skills, better regulation and business climate, environment.	The strategy should explicitly and effectively support export-orientated small and medium-sized enterprises which would enhance international trade, including through the use of inland waterway transport.	<u>Gap 1 (level 1)</u> : Lack of measures to improve transportation and storage services.  <u>Gap 2 (level 4)</u> : Insufficient financial support for investments in export activities.	<u>Actions 1</u> : Construction of storage areas, development of logistics software tools for warehouse management, development of goods packaging equipment  <u>Actions 2</u> : Allocation of a larger share of the budget for investments in export activities. Promotion of international trade in annual implementation programmes.	<u>Short-term actions</u> (through annual implementation programmes): within 2022.  <u>Long-term actions</u> (next programming period): beyond 2027.
Interreg VI-A Romania-Bulgaria Programme/BG	The programme aims to stimulate cross-border cooperation by investing in projects that help improve the social and economic conditions of the border region between the two countries.	The programme determines several areas of joint challenges which are described in the chapters Regional economy, Connectivity, Climate change mitigation and environment protection, Human capital, Integrated territorial development, and safety and security.	The programme should recognise the importance of ports for the development of the region and should address the need to increase investments in port infrastructure modernisation, improvements of road and railroad infrastructure in ports' areas, and establishment of	<u>Gap 1 (level 4)</u> : Lack of incentives to reduce air pollution caused by ships.  <u>Gap 2 (level 1)</u> : Lack of measures in support of cruise industry.	<u>Actions 1</u> : Implementation of regulations and investments in development of charging infrastructure for alternative fuels.  <u>Actions 2</u> : Development of superstructure, waste treatment and disposal systems, road infrastructure in the area of tourist sites, and	<u>Short-term actions</u> (implementation of regulations and health protocols): throughout 2022.  <u>Long-term actions</u> (modernization of



Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
			intermodal systems of transportation.		development of health protocols.	river ships; development of charging systems, waste disposal facilities and road infrastructure); throughout the programming period (2021 – 2027).
<b>Integrated Territorial Development strategies – North</b>	The strategies are part of Bulgaria's system of strategic documents for spatial planning and regional development.	The strategies consist of two main parts - analysis of the economic, social and ecological situation in the respective regions, and the vision and strategic priorities of the government for their development.	The strategies should bring attention to the importance of river port activities for the overall socio-economic development of the regions, and examine the opportunities for growth, provided by inland waterway transport.	<u>Gap 1 (level 2):</u> Lack of incentives in support of cruise industry	<u>Actions 1:</u> Building river cruise exclusively dedicated terminals and modernisation of the existing ones; promotion of cruise tourism; popularisation of tourist sites in the area of port cities etc.;	<u>Short-term actions</u> (promotion of cruise tourism and popularisation of tourist sites in the area of port cities): within the next

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
						tourist season. <u>Long-term actions</u> (building and modernisation of river cruise dedicated terminals): throughout the programming period (2021 – 2027)

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Strategy on the National Policy Framework for the development of the market regarding alternative fuels in the transport sector and for the installation of the relevant infrastructure / RO	Alternative fuels infrastructure deployment (AFID)	RO has a strategy for 2020 – 2025, aligned to the EU objectives	Implementing facilities for alternative fuels in ports	<u>Gap 1:</u> Cost effective solution for the ships with lower emission  <u>Gap 2:</u> Technical requirements for AFID	<u>Action 1:</u> Research in order to establish the cost effective solution for the ships with lower emission  <u>Action 2:</u> Research in order to establish the requirements for the port related infrastructure	<u>Action 1:</u> 2022 - 2030  <u>Action 2:</u> 2022 - 2030
	<b>Gaps summary and recommendations on the basis of transport development related strategies</b>					

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
2030 Mobility	N/A	N/A	N/A	No gaps. <sup>8</sup>	N/A	N/A
RTI-Strategy Mobility / AT	N/A	N/A	N/A	No gaps. <sup>9</sup>	N/A	N/A
Danube Action	N/A	N/A	N/A	No gaps. <sup>10</sup>	N/A	N/A

<sup>8</sup> At the specific request of the Project Partner EHOO.

<sup>9</sup> At the specific request of the Project Partner EHOO.

<sup>10</sup> At the specific request of the Project Partner EHOO.

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Strategic plan for the development of transport in the Slovak Republic until 2030 / SK	Improve navigation conditions on the Danube were provided as reasonable and implementable	low water level preventing navigation during seasons	<ul style="list-style-type: none"> <li>modernization of technical equipment and the reconstruction of current technology to ensure and rehabilitate the prescribed parameters of the waterway</li> <li>increase the safety and traffic performance of the waterway</li> </ul>	<p>Gap 1: Minimum level of investment in the development and modernization of waterway infrastructure and its components</p> <p>Gap 2: Insufficiently completed parts of waterways</p> <p>Gap 3: Inadequate operational condition of the Váh Waterway</p>	<p>Action 1: Implement technical measures to improve the navigability of the Danube waterway</p> <p>Action 2: Setting the principles of sustainable financing of the transport sector</p> <p>Action 3: The process of preparation and implementation of development projects, including related activities</p>	
	Improving the Slovak public ports system – ports Bratislava and Komarno	Ports are operated by independent private operator on lands leased from VPAS based on contractual relationship that is coming to an end. This situation reduces the operator's motivation to invest in new equipment while investment by VPAS would be considered as illegal state aid.	<ul style="list-style-type: none"> <li>Modernize public ports in Slovakia and ensure their subsequent regular maintenance</li> <li>Setting the principles of sustainable financing of the transport sector</li> <li>Periodic preparation of transport infrastructure maintenance plans</li> </ul>	<p>Gap 1: Modernization in progress, however not completed.</p> <p>Gap 2: Property and administrative relations not yet settled</p>	<p>Action 1: Continue with initiated activities according to agreed schedule and actions</p> <p>Action 2: Continue with initiated activities according to agreed schedule and actions</p>	
	Determination of eligibility and conditions for development, modernization and	<ul style="list-style-type: none"> <li>Commercial navigation in Slovakia is linked exclusively to the Danube River</li> </ul>	<ul style="list-style-type: none"> <li>unrestricted traffic and navigability on Danube River</li> </ul>	Gap 1: Unsatisfactory cooperation /	Action 1: Increased cooperation between stakeholders	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
	reconstruction of other monitored waterways in the Slovak republic	<ul style="list-style-type: none"> <li>• navigability of the river Váh not ensured</li> </ul>	<ul style="list-style-type: none"> <li>• navigability and implementing RIS on Váh waterway</li> </ul>	communication between stakeholders  Gap 2: Lack of monitoring  Gap 3: Elimination of Gabčíkovo bottleneck	Action 2: Improved monitoring  Action 3: Modernization of Gabčíkovo waterworks	
	Development and modernization of transport infrastructure	Transport infrastructure is currently owned and operated by independent private operator on lands leased from VPAS based on contractual relationship that is coming to an end. This situation reduces the operator's motivation to invest in new equipment while investment by VPAS would be considered as illegal state aid.	Modernization of existing / acquirement of new infrastructure based on settlement of ownership relation as defined in existing strategic documentation	Gap 1: Modernization in progress, however not completed.  Gap 2: Property and administrative relations not yet settled	Action 1: Continue with initiated activities according to agreed schedule and actions  Action 2: Continue with initiated activities according to agreed schedule and actions	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Port Development Master Plan / HU	<p>Encourage mode change</p> <p>Generate additional demand</p> <p>Establishment of a financing system</p> <p>Human resource development</p> <p>Creating a sustainable regulatory environment</p>	<p>Danube ports have transformed into logistics hubs</p> <p>They more fit into their regional economy, contribute to economic growth and job creation</p> <p>53 inland ports, within which 3 are national public ports and 1 public port</p> <p>Capacities are much higher than utilized</p>	<p>Danube inland ports become determinant and efficient multimodal hubs in their regional transport system to carry 10% of domestic cargo traffic on eco-friendly inland waterways</p>	<p>Low utilization of port capacity</p>	<p>Education training, Technological modernization, Financing, Investment promotion, industrial establishment, Legislation, concepts, Infrastructure development, Career model, Digitalization, automation, Sustainability, Market research, innovation</p>	
National Transport Infrastructure Development Strategy (2014 – 2050) / ...	<p>Improvement of health and property safety</p> <p>Reduction of territorial inequalities</p> <p>Strengthening international relations</p> <p>Strengthening resource-efficient modes of transport</p> <p>Increase the quality and efficiency of transport services</p> <p>Repair of physical components</p>	<p>The volume of freight transport on water – 5-6 million tonnes per year and it exclusively means Danube ports – decreases in terms of loading and shows a slow increase in terms of unloading year by year.</p>	<p>an equivalent task to increasing competitiveness is to ensure the preservation of natural and human values and resources, the conditions for sustainable growth, and the coordination of environmental and economic, national and EU objectives that may conflict with each other.</p>	<p>low-level navigation conditions on the Danube</p>	<p>Ro-La transport</p> <p>Increase the size of port areas with infrastructure for multimodality by 8,000 m<sup>2</sup> in 2030 and 15,000 m<sup>2</sup> in 2050</p> <p>Increase the length of water infrastructure equipped with intelligent transport system to 378 km in 2030.</p>	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Danube Water Transport Strategic Plan (2019) / HU	<ul style="list-style-type: none"> <li>market exploration and exploitation of explored markets</li> <li>development of infrastructure (shipping lanes, ports)</li> <li>fleet modernization</li> <li>job creation and vocational training</li> <li>the image of waterborne transport</li> <li>institutions with efficient and sufficient capacity</li> </ul>	despite the efforts to develop the Danube waterway is being expressed in contradictory opinions in other fields (primarily in the field of environmental protection).	an open, adaptable, dynamic economy based on competition and innovation, in which environmental protection plays a key role. This is reflected on the one hand, in the greater use of water transport, which is less polluting than other modes of transport, and on the other hand, in the replacement of technically obsolete and more greenhouse gas-emitting vehicles and the increased use of alternative fuels.	no meaningful dialogue between sectors, interest groups	<ul style="list-style-type: none"> <li>open conferences, public data and information</li> <li>common planning with all the stakeholders</li> </ul>	



Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Shipping Strategy (2012) / HU	<p>Mobility needs between and within Member States continue to increase</p> <p>Emissions regulations are becoming stricter</p> <p>CO2 emissions from the combustion of coal-based fuels are directly proportional to the amount of fuel used</p> <p>Individual modes of transport are becoming more valuable in the settlement environment</p>	<p>the huge increase in traffic between Europe and the Far East will lead to an increase in traffic to the EU's eastern seaports.</p> <p>The rapid growth of road transport is causing an environmental burden due to the important international road corridors passing through the country, and the infrastructural development of alternative routes bypassing</p>	<p>Hungary is able to stop the current transit traffic with an adequate transport network, junctions and intermodal and multifunctional logistics centers, i.e. ports, and associated industrial parks, and provide added value. Further large increases in turnover can be achieved by diverting containerized goods by water.</p>	<p>very few logistics centres settled by the Danube</p>	<p>Construction and modernization of berths</p> <p>Cargo ports:</p> <p>Trimodal ports with logistics center (rail and road connection)</p> <p>Transshipping ports (road connection)</p> <p>Intermittent loading bays (mainly for agricultural products)</p>	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Budapest Agglomeration Railway Strategy (2020 - 2040) / HU	increase the number of passengers on suburban railways by 80% till 2040 through the implementation of interdependent, complex investments	<p>523 000 journeys are made daily on the railway lines running to Budapest, 89% of which are suburban journeys.</p> <p>In suburban traffic, following time is 30 minutes in passenger trains.</p>	<p>Commuters would like to have a railway that is reliable, fast and more connected to the city. With a suitable alternative, people are reluctant to give up driving.</p> <p>A new connection across the Danube provides the railway a new role in the capital</p> <p>93 trains per hour crossing the borders of Budapest</p>	Budapest-centric network, but no more capacity	<p>The expansion of the southern ring railway is the first step to solve the bottleneck with a frequency of 10-15 minutes per direction, new transit connections, direct, cross-Danube, diameter suburban services.</p> <p>Tunnel connecting Kelenföld, Déli and Nyugati railway stations</p> <p>Suburban and urban railway network – rail service crossing Budapest</p> <p>Long-distance network – Budapest is not a terminus, long-distance trains can cross the country</p>	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Mid-term Logistics Strategy (2013 – 2020) / HU	managing logistics according to its economic weight which could make a significant contribution to employment and to expand investments and improve Hungary's competitiveness	Hungary's logistics performance is ranked in the middle within the EU member states.	Companies organize their internal logistics processes more and more efficiently.  Increased competitiveness  Hungary becomes a logistics service center in the region	weakness of HR, of stakeholders, of node infrastructure, of IT infrastructure, of international relations, of networking and cooperation, of R&D	<p>high-quality, practical, interdependent, and interoperable educational activities in secondary and higher education and vocational training tailored to company needs</p> <p>developing the logistics role and culture of Hungarian SMEs and</p> <p>contribute to the success of the sector through a coordinated effort by the private and civil sectors and the public administration</p> <p>Addressing the Budapest-centric nature of node infrastructure</p> <p>Facilitate in-house IT developments to reduce logistics transaction costs in the SME sector</p> <p>Ensuring more favourable conditions for cross-border logistics, make Hungary a more attractive logistics investment destination.</p> <p>Substantially promote the development of networking and cooperation in the logistics service sector</p> <p>Development of logistics knowledge bases, flow and use of knowledge – support of less common but essential forms of innovation for rationalization of logistics processes (process and organizational innovation solutions) – harmonization of research supply and corporate innovation needs (R&amp;D gap), support for innovation networking.</p>	

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
River Transport Development Strategy (RTDS) / HR	Development of inland navigation, water transport, waterways and ports	RTDS is a document which was valid for the period between 2008-2018 (Official Gazette 65/08). From 2018 and until today, new Strategy has not been adopted. From 2019 all strategic documents considering river transport and ports are under preparation.	It is important for the documents as RTDS to be up to date, not to have such a long gap between one and other for the next period of time. This is important, first of all, from the aspect of financing the projects from the inland navigation sector, projects that are of importance for the inland waterways and ports.	Lack of continuity of strategic documents  Lack of project defining and financing sources availability due to strategy missing	Ensure that strategic documents are prepared on time in order not to have a few years gap between them  Ensure that strategic documents are up to date in order to enable financing background of the specific projects	<u>2022</u>
Mid-term Development Plan for Inland Waterways and	Development of inland navigation, water transport, waterways and ports	MTDP was valid in the period between 2009-2016. The document was adopted by the Croatian Parliament and it was the basis for inland waterways and ports projects generation and financing. New version of the MTDP is under preparation and should be done by the end of the 2022.	MTDP should be up to date all the time and adjustable in accordance with needs. It should foresee if some of the projects could not be realized in the future period of time and such projects should not be obstacle to other projects.	Avoid projects that are obstacle to one another or many other projects  Mid term strategic documents should be adjustable to real needs	Define priority projects and try to define are any of those projects and their implementation uncertain and how (risk defining)  Foresee the risks for each project/objective realization, measures to prevent them	<u>2022</u>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Program for the Railway Infrastructure for the	Development and upgrade railway infrastructure	National Program for the Railway Infrastructure for the Period 2016-2020 (Official Gazette 103/2015) (further: NPRI) is the basic document which defines development priorities, construction, modernization, renewal and maintenance of the railway infrastructure system. NPRI has been adopted in line with TDS.	This Program should prepare the basis for the future railways modernization and construction. It should be in line with other transport strategies especially when project from different transport sectors are based partially or in total on the same location.	Overlap of the strategic projects from different transport sectors	To strictly define which project are priorities	<u>2022-2030</u>
Planning and construction of the public roads in Republic of Croatia / HR	Development and upgrade road infrastructure	Planning and construction of the public roads in Republic of Croatia is regulated by the Road Law (Official Gazette 84/11, 22/13, 54/13, 148/13, 92/14, 110/19, 144/21) and it is implemented through three levels: long-term - TDS; mid-term: four year Program adopted by the Government and yearly: construction and maintenance plans that should be adopted by the companies which manage road networks.	To have efficient road infrastructure as connection to the port of Vukovar.	Long periods for significant road connections realization	To recognize the priorities and significance of specific projects which have the influence on multimodal chains	<u>2022-2030</u>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
A Common Master Plan for the Eastern Counties / HR	Achieving an efficient and sustainable transport system that will meet the needs of the economy and residents in the functional region of Eastern Croatia	Common Master plan is prepared for following Counties in the eastern part of Republic of Croatia: Virovitičko-Podravska, Osijek-Baranja, Brodsko-Posavska, Požeško-Slavonska and Vukovarsko-Srijemska County. Final version of the document is from 2020.	To have a Master Plan that is a good basis for development and financing transport projects and infrastructure.	Wrong information regarding inland navigation sector	When preparing such documents consult authorities from each specific transport field for correct information	<u>2022-2030</u>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Strategy of railway, road, inland waterway, air and intermodal transport development in the Republic of Serbia 2008-2015 / RS	<p>The primary objective is sustainable, well-functioning transport systems aiming to contribute to expanded, improved and safer transport networks, which will enhance transport services, attract new investments</p> <p>More efficient implementation of investments in development projects and more intensive development of multimodal transport;</p> <p>Faster integration of RS into the EU and fulfilment of conditions from the progress report of the European Commission for Serbia 2019</p>	<p>Strategy is outdated</p> <p>Strategy of railway, road, inland waterway, air and intermodal transport development in the Republic of Serbia is not harmonized with national and international (EU) legal framework</p>	<p>Develop and adopt a new transport Strategy</p> <p>All types of transport models and infrastructure projects will be related</p> <p>Harmonization with national and international (EU) legal framework</p>	<p>Gap 1</p> <p>Lack of coherent and relevant policy or strategy to guide the development of the transport sector in Serbia</p> <p>Gap 2</p> <p>Insufficient integration between the individual transport modes</p> <p>Gap 3</p> <p>Non harmonized national and international (EU) legal framework</p> <p>Gap 4</p> <p>There is no concept of regional development and connection with trading partner countries</p>	<p>The Republic of Serbia needs to develop and adopt a new transport Strategy</p> <p>Form a cooperation committee, intersectoral coordination board or any other formal cooperation body in order to avoid any conflict of interests and to coordinate strategies and actions and acknowledge this need in relevant legislation</p> <p>Suitable framework must be established to take care of European tasks for traffic and transport</p> <p>Create a concept of regional development and connect with trading partner countries</p>	<p><u>2023</u></p>

<p><b>Strategy on Development of Waterborne Transport of the Republic of Serbia / RS for the period from 2015 to 2025</b></p>	<p>Increased volume of traffic on rivers and thus better utilisation of port transshipment capacities and rapid return of invested funds in the modernization of port infrastructure;</p> <p>Simplified administrative procedures, safe navigation without unnecessary delays;</p> <p>Final recognition of inland ports as efficient and reliable transport network elements where not only various transport modes meet, but where value is added not just to cargo but to overall supply chains;</p> <p>Facilitation of the spatial concentration of port related activities, logistic activities and industrial activities wherever physically possible;</p> <p>Increase the uptake of innovations in traditionally novelty-reluctant inland ports for the purposes of increase of reliability and efficiency of planning and operations.</p>	<p>The strategy deals with the development of the economic potential of Serbian ports and the development of navigation standards for international and national inland waterways.</p> <p>Intensive development of water transport in RS from 2015 until today indicates the need to harmonize international and national IVV regulations, implement joint administrative procedures, recognise inland ports as transport network modes that have major roles as logistic centres of Serbia and intra-European and international supply chains.</p> <p>There is no development initiative on smart ports, more digitization and automation are needed in inland ports.</p>	<p>Increase the traffic of local and foreign vessels (including transit, import and export) through the IWW network of Serbia;</p> <p>Harmonise international and national IWW regulations by implementing simplified administrative procedures (including border crossings), ensuring the safety of navigation through compliance with internationally applicable laws and standards by providing a network of IWW and ports of the highest quality;</p> <p>Duly recognise Inland port as transport network modes that have major roles as logistic centres of Serbia and intra-European and international supply chains;</p> <p>Harvest the benefits of synergies between ports and logistic and/industrial zones by locating the latter within the existing port areas or in their immediate vicinity;</p> <p>Focus further port development initiative on smart ports and more digitization and automation of port management, port infrastructure and port operations.</p>	<p>Gap 1</p> <p>Lack of information on the availability of transshipment capacities in ports and insufficient information on the benefits of water transport;</p> <p>Gap 2</p> <p>Lack of harmonized international and national IWW regulations by implementing simplified administrative procedures</p> <p>Gap 3</p> <p>lack of awareness that inland ports are crucially important elements of transport network</p> <p>Gap 4</p> <p>Lack of intersectoral coordination and cooperation in port and spatial planning</p> <p>Gap 5</p> <p>Lack of attention to automation in inland port operations</p>	<p>Present and promote ports on inland waterways in the Republic of Serbia on international level and educate potential domestic economic entities;</p> <p>Organize experts from different transport models which make analysis to the relevant EU legal framework and give recommendations for harmonization of national IWW regulations by implementing simplified administrative procedures;</p> <p>Lobbying for interests of ports with relevant institutions of the EU, supported by various impact assessments and other supportive studies on inland ports</p> <p>Form a permanent body/commission/board of relevant decision-making organisations that will coordinate their activities and safeguard mutual interests in spatial planning and strategic economic/industrial planning in relevant transport strategies and policies;</p> <p>Establish an appropriate funding mechanism or adapt the existing ones so as to include and prioritise research and innovation activities in the automation of port operations and get involved in policy making processes.</p>	<p><u>2023-2025</u></p>
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Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
National Program for public rail infrastructure / RS	<p>All river ports in RS to be connected to the national railway network;</p> <p>Develop and modernize railway infrastructure in ports;</p>	<p>In the National Railway Infrastructure Program, ports are not mentioned, regardless of the extremely great importance of the connection between the port and railway infrastructure.</p> <p>The National Railway Infrastructure Program does not take into account the forecasted increase of cargo volumes in Serbian ports, which may create bottlenecks</p>	<p>Ensure functional and operational coordination between development strategies for railway infrastructure and port strategy;</p> <p>Ensure sufficient capacity of rail links to river ports in the Republic of Serbia;</p> <p>Development plans for railway infrastructure will be focused on connecting ports to the railway network.</p>	<p>Gap 1</p> <p>The Outdated National Program for the Development of Railway Infrastructure;</p> <p>Gap 2</p> <p>Lack of intersectoral coordination between strategies in water and railway transport</p> <p>Gap 3</p> <p>Lack of connections or rail infrastructures capacities in river ports in the Republic of Serbia</p>	<p>Republic of Serbia needs to develop and adopt a new National Program for the Development of Railway Infrastructure;</p> <p>Secure that inland ports are clearly identified and mentioned in the new regulation for railway transport.</p> <p>Get involved in the elaboration of the new transport strategies in the early phase and/or during the public consultations.</p>	<u>2023</u>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Integrated Transport Strategy for the period until 2020 / BG	To provide a plan for sustainable development of Bulgaria's transport system and a framework for investments in the sector; to define the country's contribution to the Single European Transport Area, including priorities for investments in primary and extended TEN-T network and in secondary connectivity.	The strategy determines the infrastructure, organizational and operational measures required to achieve its strategic objectives through a list of concrete projects for investments in railway, road, water, and intermodal transport.	The ITS should provide financial incentives in support of port development in several main directions: construction of new port infrastructure and modernization of the existing one; improvement of intermodality and connectivity with local and transnational road and railroad networks; enhancement of digitalization and sustainability of ports.	<p>Gap 1 (Level 1): Lack of investments in construction and development of river port facilities.</p> <p>Gap 2 (Level 1): Insufficient measures in support of road infrastructure in port areas</p> <p>Gap 3 (Level 2): Insufficient measures in support of railroad infrastructure and intermodality in port areas.</p>	<p>Actions to close gap 1: concrete measures for the development of facilities in the ports of Vidin and Silistra.</p> <p>Actions to close gap 2: modernization and development of the network of lower class roads in all regions along the Danube river and construction of the Ruse – Veliko Tarnovo motorway.</p> <p>Action to close gap 3: Construction of a railway connection with the town of Tutrakan.</p>	?

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Transport Connectivity programme 2021 – 2027 / BG	To determine Bulgaria's policies regarding the usage of EU budget for investments in improvement of the transport sector; to increase the effectiveness and competitiveness of the sector; to improve transport connectivity and access; to limit the negative effects on the environment and people's health, caused by transport sector development activities.	The programme determines five strategic priorities for the development of the transport system, including improvements in road and railroad infrastructure, intermodality, innovations and technical assistance. Each of them suggests concrete projects for investments.	The TCP should include projects for investments in port infrastructure rehabilitation and development; facilitation of ports' regional connectivity through improvements of road and railway connections; construction and modernization of intermodal terminals and digitalization.	Gap 1 (Level 3): Insufficient investments for the development of railroad infrastructure in river port areas.  Gap 2 (Level 4): Insufficient investments for the development of road infrastructure in river port areas.	Actions to close gap 1: Modernization and rehabilitation of railway stations in port cities and of the rail lines Vidin – Sofia, Ruse – Gorna Oryahovitsa and Ruse – Varna.  Actions to close gap 2: Rehabilitation of first, second and third class roads in the regions of Vidin, Montana and Vratsa.	?
Government Programme 2021 – 2024 / RO	More focus on the maintenance of the IWT infrastructure	Maintenance works in port infrastructure and in the Danube fairway are not performed at a level in order which guarantee the high level of services provided by the private sector	Port infrastructure that ensures the safety of operation and high quality of services  Fairway with minimum navigation depths all over the year	Plans for maintenance that are put in practice by the ports administrations.  Plans for the maintenance to be put in practice	Action 1: elaboration of plans with responsibility and ensure the proper financing  Action 2: Ensure the financing as requested, according to maintenance plans	?

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
The General Transport	Development of naval transport infrastructure	The General Transport Master Plan list all the Romania ports as necessary to be improved	Prioritisation of investments related to ports development	Naval Transport Strategy	Action 1: Elaboration of the Naval Transport Strategy	?
RO / 1	Implementation of strategies through development projects	Strategies and financing sources identified	Resilient and efficient infrastructure	Implementation in time of infrastructure projects	Action 1: institutional capacity to be improved and stability in management and staff Action 2: improvement of the process of obtaining all necessary approvals Action 3: Contacting companies which are able to finalize the works in time	?

<p><b>White Paper 2011: Roadmap to a single European transport area / EU</b></p>	<ul style="list-style-type: none"> <li>Final recognition of inland ports as efficient and reliable transport network elements where not only various transport modes meet, but where value is added not just to cargo but to overall supply chains.</li> <li>Efficient usage of the scarce of space near waterways (coastal areas, river banks) through promotion of common user terminals rather than dedicated terminals.</li> <li>Facilitation of the spatial concentration of port related activities, logistic activities and industrial activities wherever physically possible. Increase the uptake of innovations in traditionally novelty-reluctant inland ports for the purposes of increase of reliability and efficiency of planning and operations.</li> </ul>	<ul style="list-style-type: none"> <li>White paper recognizes that only seaports have a major role as logistics centres and require efficient hinterland connections, while it recognizes the potential only in inland waterways, without referring to inland ports even implicitly.</li> <li>Request for an improvement of market access to ports refers only to seaports.</li> <li>White paper calls for the development of multimodal terminals at sea and inland ports, without mentioning activities related to attraction of logistic and/or industrial zones in or near port areas for the harvesting of synergies between transshipment, logistic and production activities.</li> </ul> <p>White paper does not recognize the importance of further digitization and automation and autonomation of port operations neither in seaport nor in inland ports.</p>	<ul style="list-style-type: none"> <li>Inland ports are duly recognized as transport network nodes that have major roles as logistic centres of intra-European and international supply chains;</li> <li>Market access is improved for inland ports as well;</li> <li>Initiatives to harvest the benefits of synergies between ports and logistic and/industrial zones by locating the latter within the existing port areas or in their immediate vicinity;</li> </ul> <p>Further port development initiatives should be more focused on smart ports and more digitization, automation and autonomation of port management, port infrastructure and port operations.</p>	<p>Gap 1: lack of awareness that inland ports are crucially important elements of transport network.</p> <p>Level: 1</p> <p>Gap 2: lack of market access regulation for inland ports.</p> <p>Level: 2</p> <p>Gap 3: lack of intersectoral coordination and cooperation in port and spatial planning.</p> <p>Level: 1</p>	<p>Lobbying for interests of ports with relevant institutions of EU, supported by various impact assessments and other supportive studies on inland ports.</p> <p>Get involved in the elaboration of the new transport policy/roadmap in the early phase and/or during the public consultations.</p> <p>Form permanent body/commission/board of relevant decision-making organizations that will coordinate their activities and safeguard mutual interests in spatial planning and strategic economic/industrial planning in relevant transport strategies and policies.</p> <p>Establish an appropriate funding mechanism or adapt the existing ones so as to include and prioritize research and innovation activities in the automation of port operations and get involved in policy making processes.</p>	<p><u>2023-2030</u></p>
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Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Trans-European Transport Network Policy / EU	<ul style="list-style-type: none"> <li>Secure the high priority in transport infrastructure development equal to land-based cross-border projects.</li> <li>Recognition of inland ports as logistic hubs, trade gateways, industrial clusters and energy hubs. Recognition of inland ports as sustainable poly sectoral hubs where sustainable integration with other modes is provided.</li> </ul>	<ul style="list-style-type: none"> <li>Inland ports are not recognized as cross-border projects.</li> <li>Inland ports are not treated as cross-border multimodal nodes, trade gateways, industrial clusters and energy hubs. The role of inland ports is not recognized neither in inland waterway transportation nor in short-sea shipping routes, unlike seaports, where the need of their development, as well as their hinterland connections is fully recognized and supported.</li> </ul>	<ul style="list-style-type: none"> <li>Secure the high priority in transport infrastructure development equal to land-based cross-border projects.</li> <li>Recognition of inland ports as logistic hubs, trade gateways, industrial clusters and energy hubs.</li> <li>Recognition of inland ports as sustainable poly sectoral hubs where sustainable integration with other modes is provided.</li> </ul>	<p>Lack of recognition of inland ports as cross-border sections of the transport network.</p> <p>Level: 1</p> <p>Lack of recognition of inland ports as poly sectoral hubs of transport, industry, logistics and energy where sustainable production and cargo operations take place.</p> <p>Level: 1</p> <p>Lack of focus on development of inland ports as decarbonization hubs.</p> <p>Level: 1</p>	<ul style="list-style-type: none"> <li>Secure full recognition of inland ports as cross-border sections of the inland waterway transport network to obtain prioritization in transport infrastructure development.</li> <li>Include inland ports in the new TEN-T policy as poly sectoral hubs, like for maritime ports, in an appropriate and unambiguous article of the new regulation. Secure clear mentioning of inland ports in the new regulation acknowledging the exact same role of inland ports in inland waterway transport and short sea shipping as maritime ports have in short sea shipping.</li> </ul>	<u>2023-2030</u>

Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
Sustainable and Smart Mobility Strategy / EU	<ul style="list-style-type: none"> <li>Achieved awareness of importance of inland ports as threefold green energy hubs – in supply, production and facilitation of green solutions. Secure significant financial means to inland ports so as to help them achieve and maintain the status of green hubs and engines of sustainable growth.</li> </ul>	Inland ports are recognized as green energy hubs, only in terms of provision of alternative fuels or greening of port operations, and testbeds for waste reuse and the circular economy.	<ul style="list-style-type: none"> <li>Full recognition of inland ports as energy hubs not only in provision of green energy but also in production of green energy for vessels and own functioning. In order to achieve the full capacity of green energy hubs, inland ports should be incentivized for their transition efforts.</li> </ul>	<p>Gap 1: inland ports are not fully treated as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and alternative fuels supply</p> <p>Level: 1</p> <p>Gap 2: incentive schemes for greening of inland ports are scarce and insufficient.</p> <p>Level: 2</p>	<ul style="list-style-type: none"> <li>Pursue full endorsement of inland ports, on policy and regulatory levels, as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and alternative fuels supply. Analyse the regulatory framework for all types of similar incentives, existing and potential, design and propose different incentive schemes for different levels of greening activities in ports.</li> </ul>	<u>2023-2030</u>

<p><b>NAIADES III Action plan / EU</b></p>	<ul style="list-style-type: none"> <li>• Funding the appropriate projects aiming at improving the quality of inland ports infrastructure.</li> <li>• Provide measurable compliance criteria for improving the quality of inland ports' infrastructure.</li> <li>• Contribute to the prevention of pollution from inland ships and provide guidelines for ships and ports for implementing the new legislative framework. Provide adequate funding schemes for inland projects contributing to the creation of "Smart inland waterway transport".</li> </ul>	<ul style="list-style-type: none"> <li>• Confusion around the statement of the Commission that it will give more support for projects aimed at improving the quality of inland ports infrastructure and their multimodal connections to rail, road and sea through dedicated terminals.</li> <li>• The "quality of inland ports infrastructure" is not defined and no KPIs measuring the level of quality are identified.</li> <li>• Time for common European inland waterways rules on preventing pollution from ships – an inland waterways version of MARPOL.</li> <li>• The initiative of creating "Smart inland waterway transport" appears to be focused on waterways and vessels and it apparently leaves inland ports out of the scope.</li> </ul>	<ul style="list-style-type: none"> <li>• "Dedicated terminals" are clearly defined while the focus of the Commission's support is set on the projects aimed at improving the quality of inland ports infrastructure and their multimodal connections to rail, road and sea.</li> <li>• Quality of inland port infrastructure is clearly defined along with the criteria of quality to be fulfilled and a set of tailor-made KPIs are identified for the measurement of the quality achievement.</li> <li>• Initiative is made for Europe wide inland waterways rules on preventing pollution from ships – an inland waterways version of MARPOL.</li> </ul> <p>The role of inland ports in achieving "Smart inland waterway transport" is recognized and clearly defined, while "smartening" of inland ports is financially supported by relevant funding instruments of the EU.</p>	<p>Gap 1: Priority in projects given to undefined "dedicated terminals".</p> <p>Level: 2</p> <p>Gap 2: Quality of inland port infrastructure is not specified and no criteria and appropriate KPIs are identified to assess the quality of inland port infrastructure.</p> <p>Level: 1</p> <p>Gap 3: No harmonized European inland waterways rules on preventing pollution from ships.</p> <p>Level: 3</p> <p>Gap 4: Lack of recognition of inland ports' role in creating "Smart inland waterway transport" and adequate financial instruments or call topics.</p> <p>Level: 2</p>	<ul style="list-style-type: none"> <li>• Clearly define the term "dedicated terminals" to neutralize any ambiguous interpretations and misleading of potential project proponents.</li> <li>• Clearly define the quality of inland port infrastructure, the criteria for quality and design appropriate KPIs to measure the compliance of ports' infrastructure with the targeted quality criteria/levels.</li> <li>• Commence work on common regulatory framework for rules on prevention of pollution of inland waterways by ships. Secure full and unambiguous recognition of inland ports' role in creating "Smart inland waterway transport" and provide relevant funding instruments and schemes for appropriate project and initiatives.</li> </ul>	<p><u>2023-2030</u></p>
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Strategy / Country	Objectives	Current state	Desired state	Gap	Actions to close the gap	Timeline for actions
The European Rail Network for Competitive Freight / EU	<ul style="list-style-type: none"> <li>Avoidance of conflicting interests between different infrastructure managers.</li> <li>Maintain the ports' rail infrastructure an integral part of the TEN-T rail network.</li> </ul> <p>Maintain the given level of charging autonomy for port authorities managing port's internal rail infrastructure and avoid inconsistencies in different regulations.</p>	<ul style="list-style-type: none"> <li>Railway governance in European inland ports is extremely complex and diverse in terms of rail infrastructure development and maintenance, railway infrastructure charging, operation of rail related services and trains.</li> <li>Due to the Directive 2012/34, Member States are allowed to exclude local railway infrastructures which do not have any strategic importance from the European legislation on rail infrastructure, which may hamper the interests of some port authorities (managing and/or operating port railways) to fulfill the overall greening of transport chains and to obtain funding for railway connections.</li> </ul> <p>Directive 2012/34 and Commission Implementing Regulation 2015/909 on infrastructure and service charges and calculation of costs do not recognize the specific situation of the port rails governed by PA.</p>	<ul style="list-style-type: none"> <li>Cooperation between the national rail infrastructure manager and port authorities, whether the latter are managing the port rail infrastructure or not.</li> <li>TEN-T Guidelines are the supreme regulation determining the port's importance and relevance in view of the EU legislation and TEN-T ports' railway infrastructure should be an integral part of the TEN-T rail network.</li> <li>Principles of autonomous charging for ports laid down in the Port Services Regulation is respected by the Directive (EU) 2012/34, for railway infrastructure managed by port authorities.</li> </ul>	<p>Gap 1: lack of coordination between the national rail infrastructure managers and port authorities in terms of rail connections and port internal rail infrastructure and recognition of the need for such coordination in the Regulation.</p> <p>Level: 3</p> <p>Gap 2: determined port rail infrastructure is in danger of being left out of the scope of EU legislation.</p> <p>Level: 2</p> <p>Gap 3: Specific position of port rail infrastructure in terms of charging is not recognized</p> <p>Level: 1</p>	<ul style="list-style-type: none"> <li>Form a cooperation committee, intersectoral coordination board or any other formal cooperation body in order to avoid any conflicting interests and to coordinate strategies and actions and acknowledge this need in relevant legislation.</li> <li>Ensure that the port rail infrastructure remains an integral part of the TEN-T rail network and that it remains within the scope of EU legislation and thus preserve its importance.</li> </ul> <p>Ensure that the autonomy of charging for port infrastructure, including the port's rail infrastructure is respected as laid out in Port Services Regulation (PSR).</p>	<u>2023-2030</u>

**Table 7: Summary of gap analysis and recommendations for the Danube region**

## 9. Conclusions

The number of analysed strategies and policies is limited and conditioned by scope, available time, financial and human resources. Nevertheless, even this limited scope of strategies taken into account in this report, showed considerable room for improvement of these strategies and policies for the benefit of all. It also proves that the future work on European transport and climate policies, which are closely related, requires much more coordination of different actors and, if necessary, longer consultation periods so as to allow for deep and more thorough analysis and potential impacts on various actors and stakeholders. In particular, a wide range of cooperation networks between relevant supranational, national, regional and local authorities, but also between other organisations such as research funding organisations and academic institutions, port, intermodal and rail sector associations and environmental groups should be either extended or created, all for the common benefit.

Finally, the results shown in this National Recommendations and Consolidated Strategy Plan proved that wider impact assessment needs to be performed even during the public consultation process, mid-term and at the end of the time horizon foreseen for the policy document under analysis. Moreover, impact assessment studies should also involve more actors, while public consultation processes should find a different format allowing them to compulsory (not just voluntarily) include the opinions and positioning of various sectoral and/or expert groups and organisations.

This strategy plan has demonstrated that there are huge gaps not only in intersectoral cooperation, but also between different transport modes within the transport sector itself. In connection with that, virtually every strategic document that was analysed was found to have various levels of influence on ports (existing or potential). Each participating project partner proposed a set of recommendations on how to close the identified gaps along with the proposed time frame for such actions.

The main message of the output is that both sectoral and intersectoral cooperation needs serious improvement for the benefit of the strategic national interests and for the transport network of the Danube region as a whole. Fortunately, all the gaps that were identified are possible to be bridged and a myriad of very useful, realistic, concrete and achievable recommendations are given.