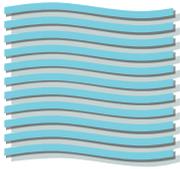




25 YEARS
BSPC
BALTIC SEA PARLIAMENTARY CONFERENCE

The Rapporteurs on Integrated Maritime Policy

Report 2015/2016



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The Baltic Sea Parliamentary Conference (BSPC) was established in 1991 as a forum for political dialogue between parliamentarians from the Baltic Sea Region. BSPC aims at raising awareness and opinion on issues of current political interest and relevance for the Baltic Sea Region. It promotes and drives various initiatives and efforts to support a sustainable environmental, social and economic development of the Baltic Sea Region. It strives at enhancing the visibility of the Baltic Sea Region and its issues in a wider European context.

BSPC gathers parliamentarians from 11 national parliaments, 11 regional parliaments and 5 parliamentary organisations around the Baltic Sea. The BSPC thus constitutes a unique parliamentary bridge between all the EU- and non-EU countries of the Baltic Sea Region.

BSPC external interfaces include parliamentary, governmental, sub-regional and other organizations in the Baltic Sea Region and the Northern Dimension area, among them CBSS, HELCOM, the Northern Dimension Partnership in Health and Social Well-Being (NDPHS), the Baltic Sea Labour Forum (BSLF), the Baltic Sea States Sub-regional Cooperation (BSSSC) and the Baltic Development Forum.

BSPC shall initiate and guide political activities in the region; support and strengthen democratic institutions in the participating states; improve dialogue between governments, parliaments and civil society; strengthen the common identity of the Baltic Sea Region by means of close co-operation between national and regional parliaments on the basis of equality; and initiate and guide political activities in the Baltic Sea Region, endowing them with additional democratic legitimacy and parliamentary authority.

The political recommendations of the annual Parliamentary Conferences are expressed in a Conference Resolution adopted by consensus by the Conference. The adopted Resolution shall be submitted to the governments of the Baltic Sea Region, the CBSS and the EU, and disseminated to other relevant national, regional and local stakeholders in the Baltic Sea Region and its neighbourhood.

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Preface

This report summarizes the developments in the Integrated Maritime Policy (IMP) field since the renewed appointment of MP Jochen Schulte (Mecklenburg-Vorpommern) and of MP Jörgen Pettersson (Åland Islands) as BSPC Maritime Rapporteurs by the Standing Committee at the conference in Rostock.

A number of interesting conferences have taken place throughout the past year, such as the Åland Maritime Day, the European Maritime Day in Turku, or the Vasco da Gama Final Conference in Brussels. For further information on the conferences please refer to the first part of the report. One of the striking developments has been the great push from all levels of governance in Europe to greatly invest in skills development in the Blue Economy. This can only be seen as a positive development and should receive the full support of the Baltic Sea Parliamentary Conference, also bearing in mind its Work Programme 2015-2016. For the transformation of the Blue Economy is driven by skilled people. Industry and education providers must be connected to plug the skills gap and to ensure that a new generation of marine scientists, professionals, technicians and entrepreneurs is trained.

Aside from the information on what is done to promote skills development in the Blue Economy we have included a number of other important legislative developments at the international level in the second part of our report, which are going to affect our own industries and those of third countries operating in the Baltic Sea. Among others, HELCOM has finally agreed on a Roadmap for a Baltic Sea NO_x Emission Control Area (NECA). In this part of our report we also provide a brief update on shipping companies' experiences with the stricter Sulphur Emission Control Area (SECA) regulations, which went into effect on 1 January 2015. Further, we update on a number of other legislative acts that were the subject of previous report. Other updates concern passenger ship sewage discharges, support for "Blue Projects" in education, research and innovation, state aid rules, and the third Port Package.

We call upon stakeholders to realize that sustainability can help drive the growth of a sector that already represents €550bn of gross value added and provides 5 million jobs. But policymakers must also push for improved ocean governance that safeguards the marine ecosystem and biodiversity, while simultaneously providing legal certainty and providing markets for sustainable blue investments.



Jochen Schulte



Jörgen Pettersson

In the third part of this report we included a conference summary by MP Jörgen Pettersson about this year's Shippax Conference. The article includes a detailed summary of current trends in shipping.

Riga 28 August 2016

Jochen Schulte
Maritime Rapporteur

Jörgen Pettersson
Maritime Rapporteur

A – Activities of the Maritime Rapporteurs

European Maritime Day (EMD) in Turku and follow-up

Since the end of the BSPC Working Group on Integrated Maritime Policy, the BSPC has been represented at the European Maritime Days through its Maritime Rapporteurs. This year, MP Jörgen Pettersson from the Åland Islands participated in the EMD 2016, which took place on 18-19 May in Turku, Finland.

All of the workshops of this year's edition ran under the dictum to innovate, learn and adapt, driven by the need for greater sustainability in the Blue Economy.

The European Commissioner for Environment, Maritime Affairs and Fisheries, Mr Karmenu Vella, underlined that the drive for greater sustainability is opening up new global business opportunities. For instance, renewable energy from the sea has a huge global potential. The Carbon Trust – an independent expert organization dealing with carbon reduction, resource efficiency strategies and commercializing low carbon technologies – estimated a total of €525bn cumulative market value by 2015. The growth of offshore renewable energy has far outstripped that of more traditional maritime sectors. 90% of wind turbines are located in European waters. Employment in the European offshore industry has now reached half that in fishing.

In order to ensure the sector's future, the Commissioner deemed it necessary to encourage investors to back smart and sustainable solutions. Accordingly, Blue Growth should be encouraged more systematically than in the past. To do so, the Commissioner outlined 3 fields of action:

Firstly, the Commission works closely with the industry, Member States and regions to produce a strategic roadmap for the ocean energy sector by the end of 2016 as part of the Ocean Energy Forum. The Commissioner explained that initially, solar and wind power had benefitted from electricity prices that had reflected the costs associated with their novelty. Without this support they would not have taken off. As they moved to mass production, costs had plummeted. Lessons should be drawn for tidal and wave energy.

Secondly, the Commission has launched three calls over €7.5m to promote innovation and investment in the Blue Economy. This is in line with the BSPC's Work Programme, which has identified the labor market in the Baltic Sea Region and labor mobility – among others – as key priorities of its work in 2015/2016.

Specifically, the European Commission posits that the transformation of the Blue Economy can only be driven by skilled people. However, the industry repeatedly points out that qualified professionals are in short supply. Therefore, the Commission has launched a Blue Careers initiative, aiming to connect industry and education providers, close the skills gap and train a new generation of marine scientists, professionals, technicians and entrepreneurs. The BSPC will address similar challenges at its Silver Jubilee edition at the end of this month in Riga.

The Commission has also launched a Blue Labs call, encouraging partnerships between young researchers and the business community, and a Blue Tech call, aiming to develop a pipeline of bankable, ready-to-invest demonstration projects in order to help make the leap from research results to business ventures.

But skills development in the Blue Economy is also driven by the regions. Please refer to the following section on the Final Conference of the Vasca da Gama project for more information on the subject.

Thirdly, investments should be encouraged by reducing the perceived risk in the Blue Economy. Financial institutions need to look more favorably on the risk that inevitably comes with innovation. Therefore, the Commission has launched the European Fund for Strategic Investment (EFSI). About €315bn has already been mobilized by the EFSI and has been used towards large Blue Economy projects. The Commissioner cited Denmark as a best practice example for a country that invests in innovation. As such, the country set up a fund worth €2bn to invest in large energy projects, including offshore wind. Denmark is using the EFSI guarantee to convince private investors to contribute to this fund. In addition, the Commission also set up a European Investment Project Portal (EIPP), which serves as a bridge between EU project promoters and investors worldwide thereby catalyzing and accelerating the fruition of more EU investment opportunities. It is part of the “Investment Plan for Europe” and is one of multiple strands pursued by the Commission with the goal to revive EU investment activity. The minimum EIPP project size is €10mn.

Lastly, the Commissioner highlighted the need of improved international ocean governance. The current framework would not ensure a level playing field, provide enough legal certainty and safeguard marine ecosystems and biodiversity. The issue was also raised G7 Environment Ministers' Meeting on 15-16 May in Toyama, where it was included in the conclusions of the summit.

Further key messages emerging from the two intense days of debate include:

- Clusters are enablers that can connect good ideas – of SMEs and others – to industry partners and finance providers and help drive transitions to new Blue Growth activities.
- Sectors such as ocean energy provide massive opportunities for growth, jobs and global environmental gains; we should not be discouraged by the challenges that are still outstanding, but should tackle them gradually and keep a long term focus.
- Ocean Energy also shows how important it is to prioritize strategic investments that provide returns not only in economic terms but also in terms of climate and environmental benefits.
- Access to finance continues to be a challenge. Policy makers have a huge responsibility to strengthen risk guarantees, cut red tape and ensure stable regulatory environments.
- Action at regional level has a huge role to play in boosting Blue Growth. The most advanced regions are systematically developing their transnational partnerships to maximize their potential and bundle strengths. This could be further facilitated through wider Blue Growth platforms that could turn the ambitions of these actors into concrete and joint investments.
- If we are to get a return from all the investments in innovation and infrastructure, developing skills is critical. It is hard to predict what future jobs will entail, so it is important to educate also for the 'unknown'.
- The element to emphasize when attracting capable and motivated young people to maritime careers is not just the purely technical interest of the profession but also the role of 'steward of the oceans'.

- Blue Growth can only thrive within a strong and reliable international ocean governance system, for which intense cooperation and stricter implementation and enforcement globally are needed.

One of the most interesting topics at the Conference were the use of autonomous vessels in the future. Some of the conclusions were that the regulators should:

- Support research, technology development and standards for autonomous vessels.
- Take the lead and coordinate development of a new regulations framework for autonomous vessels with the aim to make proposals to IMO.
- Promote a goal/performance based regulatory framework that does not rely heavily on prescriptive requirements and legacy technologies.
- Facilitate trials and piloting efforts by making exemptions from current regulations and establish designated test areas for unmanned vessels.
- Support research and standardization within cyber security, with focus on maritime context and applications.
- Realize the importance of standards for quality assurance and to achieve interoperability, competition and economies of scale.
- Foster data governance in order to enable a fair and fertile environment for new data-driven services that will capitalize on EUs technology excellence and trigger high skill job creation.

Vasco da Gama Final Conference in Brussels

The issue of skills development in the maritime economy was the core of the project “Vasco da Gama – Training for Greener and Safer Maritime Transport”. Jochen Schulte attended the Final Conference of the project on 1 March in Brussels.

The aim of the project was to contribute to achieving the development of high professional skills and the development of Education and Training within the EU. In particular, it focused on improving the skills of persons employed in European shipping with a view to addressing specific challenges such as maritime safety and the reduction of environmental damage. It also aimed to lay the foundations for mobility within Europe, involving education and training institutions. The project was led by the Conference of Peripheral and Maritime Regions of Europe (CPMR), an organization that brings together some 150 regional authorities.

The main drivers of the project – the French region of Bretagne and Mecklenburg-Vorpommern – emphasized the importance of maritime professions at the regional level. Jochen Schulte praised the project’s character as an incubator for projects covering a variety of topics and geographical areas, all focused on promoting mobility and the key role given to regional authorities, while at the same time developing partnerships with other professional and academic stakeholders from the sector. Jochen Schulte underlined the activities of the BSPC in this respect, not least against the background of the current BSPC Work Programme.

The Maritime Rapporteur recapitulated the lessons-learned from the project.

- 1) The importance of exchange programs: The first Vasco da Gama Summer School was held on 24-29 August 2015. It was organized jointly by the CPMR and Kalmar Maritime Academy. Participants from the Atlantic, Baltic, Black Sea and North Sea benefited from briefings and discussion time with high-level speakers on the issues of maritime safety and security, integration of the human element and cultural influences in these areas, and greening of maritime transport. A series of case studies and exercises gave an operational dimension to the training course. All parties involved had agreed that this first Summer School had been a great success and that it is worth repeating in the future. It is the stated goal of the organizers that the lessons learned from this first edition will help to develop the content of future Vasco da Gama Summer Schools. This important milestone should be further developed.

- 2) The contribution to the networking of the stakeholders: For instance, cadets from the involved academies can participate in experimental pilot training sessions that will be organized in 2 different maritime basins. A high-quality cross-national master program in Sustainable Shipping at an advanced level has been developed, which ran from January to June 2015, with the participation of close to 50 people: students and seafarers from Sweden, France and Germany. Various professionals from across the shipping supply chain have been brought together in the development of a course module. The project has thus contributed to a network of partners, which extends from the Black Sea over other sea basins all the way to the Baltic Sea, and which constitutes the nucleus for exchange and cooperation in this region.
- 3) The necessity of the input from the involved regions: The regions are key actors in the improvement of the attractiveness and internalization of maritime professions, as they are responsible for education and training, as they are drivers of regional economies and economic sectors, and as they are the ones best equipped with knowledge about the local and regional situations and needs. The difficulty – and the objective of this project – lies in combining these strengths and insights in a mutually beneficial manner.

Jochen Schulte concluded by urging stakeholders to continue and build upon the “Vasco da Gama” label even after its formal conclusion. The project could be continued in the framework of the separate sea basins, for instance with support from Interreg. GD MARE distinguishes its Blue Growth initiative among others based on sea basins, and the education and training in maritime professions should be an integral part of any growth strategy. The regions could offer their know-how to the Commission and its GDs in so far as personnel and quality needs are concerned, for instance in the areas of sea traffic or the “Blue Economy”.

To do so, CPMR should mind the EU context. It must turn to respective priorities and initiatives to complete them, to develop technical synergies with them and, to participate in them as appropriate. Special attention should be paid to the initiatives such as the Blue Careers Initiative. The CPMR is already working on sectors such as maritime transport, port logistics, and shipbuilding as part of discussions on the implementation of technical partnerships that should ensure the design and development of European cooperation projects.

The regions play an equally important role in this regard. A concept catalogue should be developed based on the experiences gained so far and together with the CPMR General Secretariat interregional projects should be designed and implemented by the regions.

Ferry Shipping Conference

On 13-14 April Jörgen Pettersson participated in the fourteenth edition of the Ferry Shipping Conference that took place on board Silja Symphony, trafficking between Stockholm and Helsinki. Over forty different speakers shared their knowledge, experiences, and analyses during these intense days. After the moderator Bo-Lennart Thorbjörnsson and Tallink Group's CEO Janek Stalmeister opened the conference by tradition; hitting the ship's bell, the floor and opening speech belonged to the main sponsor Anders Rundberg, CEO of Carus:

“It looks brighter in many ways, but we must never be complacent. It is important to continue to work to attract new customers on board, not just those that are recurring. The UK has been successful with joint ventures – such as National Ferry Fortnight, for people to choose the ferries – which we should do in the Baltic Sea as well.”

Bo-Lennart Thorbjörnsson went on to set the tone for the two days with the heading “Where is the industry now?” He highlighted the fact that many of the world's shipping companies made very good results last year. DFDS outperformed all time high while the other major actors, i.e. Viking Line, Rederi Ab Eckerö and Tallink Group raised its earnings significantly: “We look positively on the future and we have strengthened our office organization to keep developing our service and fleet.”

Åland Maritime Day in Mariehamn

On 12 May Jörgen Pettersson attended the Maritime day in Mariehamn. At the event there were both company presentations and seminars. One of the interesting seminars addressed the question of how to install scrubbers and methanol installations without malfunctions. The CEO of Godby Shipping Dan Mikkola said in his presentation that until 2014 the company concentrated on running its ships as efficiently as possible: “Today we are looking for good second hand vessels. From 2017 and forward we will be looking at next generation ships.”

Per Stefenson, Marine Standards Advisor, Stena Teknik talked about fast and smooth installations of scrubbers on existing ships. Everything is loaded during normal harbor time and installations are made by a team at sea. He also talked about methanol fuel. Stena Germanica is the world’s first methanol ship. Wärtsilä has developed the technique to convert existing engines. Methanol leads the way to the zero vision it is therefore a sustainable fuel for global shipping.

Tommy Mattila, Sales and Marketing Director, at Skangas talked about LNG as a fuel for the future. LNG fulfills all coming emission regulations as such without any extra systems. There is no oil spill risk. The price development of LNG is foreseen to be more stable than that of oil. However the LNG supply chain is more expensive than that of oil especially in the startup phase when the volumes are small. There are currently 165 confirmed LNG projects. He stated that:

- Environmental restrictions will get stricter – natural gas /LNG is a part of the solution for Industry, Marine and Traffic segments.
- Significant resources of gas and increased infrastructure ensure availability and competitiveness.
- LNG will be a major fuel for shipping.

B – Legislative Developments at the EU level with regard to all BSPC members

Stricter SECA regulations as of 1 January 2015

One ongoing theme of our work has been the challenge of vessels being subject to stricter regulations both at global or regional level for 10 years since the creation of the first Emission

Control Area in the Baltic Sea. Since, ECAs have been enlarged to The Channel and North Sea, as well as North America and the maximum sulphur content has been reduced gradually from 4.5% to 1.5% and 1% up to this date, while the regulations set new limits in 2015 at 0.1% sulphur, which presents significant challenges for the industry including oil majors, shipping lines and shippers.

Already in our previous reports we informed extensively about SECA and its potential impact. Now that shipping companies have had some time to evaluate the situation it must be concluded that the impact on shipping companies has not been as severe as predicted and that a modal shift from sea to land has not taken place to the degree that could be expected. This conclusion is based both on our talks with shipping companies throughout the past two years, as well as on statements made by shipping companies in the context of the European Maritime Day 2016 in Turku (see also Section A above).

However, the reason for the good news is also due to the fact that the context in which shipping companies operate has been more favorable than could be expected. Most importantly, oil prices are at a long-time low. Fuel prices went down with the global reduction of the crude oil price from close to \$ 100/barrel to \$ 30/barrel (Q3 2014 vs. Q1 2016).

Therefore, despite of the fact than shipping companies had to retrofit ships and/or order new builds, the additional costs due to the stricter SECA regulations did not have to be borne by the customers, nor did shipping routes on a larger scale have to be abandoned. However, this may well still change, depending on the economic context.

As was pointed out by us in last year's report, we therefore continue to urge to investigate, if and how a modal shift from sea to land has taken place since the introduction of the stricter SECA regulations on 1 January 2015. Should such a modal shift have indeed taken place it would then be in order to evaluate how counter-measures could be initiated and how the affected sector can be supported, bearing in mind EU state aid rules.

We will continue to monitor the development and inform the BSPC accordingly.

HELCOM agrees on a Roadmap for a Baltic Sea NECA

On 10 March 2016 the Annual Meeting of the Helsinki Commission (HELCOM), consisting of the Baltic coastal countries and the EU, agreed on a Roadmap, which includes a commitment to submit to IMO a proposal for a Baltic Sea NO_x Emission Control Area (NECA) - according to the IMO MARPOL Convention Annex VI - in parallel with the North Sea. According to the Roadmap it will be submitted to the IMO MEPC 70 meeting, scheduled for next autumn.

Nitrogen Oxide (NO_x) emissions from shipping is a major source of airborne deposition of Nitrogen, aggravating the serious eutrophication of the Baltic Sea. According to estimates, Baltic Sea NECA has potential to cost-efficiently and significantly - around 7 kilotons - reduce Nitrogen input to the Baltic Sea annually after a time lag needed for fleet renewal as the regulation addresses only new ships.

The initiative for a Baltic Sea NECA emerges from the HELCOM Baltic Sea Action Plan, agreed by the nine coastal countries and the EU in 2007.

Beginning tomorrow the coastal countries and the HELCOM Secretariat will prepare for a submission to the MEPC 70 Meeting, scheduled to take place in October 2016. This Baltic Sea NECA submission is planned to take place parallel to a similar NECA submission from the North Sea countries.

Passenger ship sewage discharges into the Baltic Sea will be banned

In April 2016 the International Maritime Organization (IMO) agreed that the Baltic Sea special area for sewage discharges from passenger ships under Annex IV or the MARPOL Convention will take effect by latest 2021 for IMO registered passenger vessels. However, in certain cases of direct passages between St. Petersburg area and the North Sea there is a two-year extension to the deadline, until 2023.

The decision means that by 2021 all IMO registered passenger vessels sailing in the Baltic Sea, as the first region in the world, must discharge all sewage at port reception facilities, or treat it with an on-board treatment plant certified to meet stringent special area requirements. For new ships built on or later than 2019, these requirements will apply earlier.

By the IMO meeting in April, all Baltic coastal countries had sent confirmation of adequate reception facilities in Baltic ports, as a result of substantial work on port reception facilities for sewage and their use in the Baltic Sea area by national administrations, ports and the passenger ship industry (see also last year's IMP report).

The Baltic Sea parliamentarians have always supported the notion of bringing economic and ecological aspects together, as much as possible. Especially for the tourism sector, the good ecological state is an indispensable pre-condition in the competition with other regions. And for this reason, we also have to bear in mind economic aspects when devising strategies for the protection of the Baltic Sea. Against the background of these challenges we will continue to call for the implementation of an EU-wide concept for the set-up of port reception facilities.

Research and innovation in the Blue Economy to create jobs and growth

On 8 September 2015 the European Parliament adopted a resolution on untapping the potential of research and innovation in the Blue Economy to create jobs and growth. It refers to a Commission communication of 8 May 2014 entitled 'Innovation in the Blue Economy: realizing the potential of our seas and oceans for jobs and growth'. The Commission regards aquaculture, coastal and

maritime tourism, blue biotechnology, ocean energy and deep sea mining as economic sector with special economic potential. The European Parliament regards this definition and approach as too narrow, as it does not cover all important aspects of Blue Growth, and demands a comprehensive action plan. The EP especially considers maritime research and good vocation training and education an important basis for the Blue Economy. The precautionary principle and the eco system approach should form the basis of the Blue Economy. Regarding the financing of the Blue Economy the different EU financial instruments should be better integrated, among others also a knowledge and information community.

Support for “Blue Projects” in education, research and innovation

On 13 September 2016 the EP Intergroup ‘Seas, Rivers, Islands and Coastal Areas’ discussed prospects for Blue Growth in the Baltic Sea Region. DG MARE announced a call for blue technologies for the spring of 2016, which has now been launched. €2.5m shall be made available for the different European sea basins. The gained insights shall form the basis for a European master plan “Blue Technology” and support Blue Growth in the European sea basins.

The call is part of a larger initiative that the Commission announced on 2 February 2016, which with “Blue Projects” in education, research and innovation are supposed to be funded. The call “Blue Careers in Europe” aims at contributing to fill existing skills’ gaps by supporting activities that will increase the employability of various target groups in Blue Economy sectors (e.g. students, workers, unemployed people etc.). It is intended to contribute to training a new generation of students, scientists, professionals, technicians and entrepreneurs equipped with the appropriate skills to match the needs of the industry and to provide people already working in the field with the new skills required.

On 5 April 2016 the Commission formally launched the aforementioned calls for the Blue Economy. With over €7.5m projects in the following areas will be supported: “Blue Jobs” (€3.45m for up to 7 projects), “Blue Labs” (€1.7m for up to 6 projects), and “Blue Technology” (€2.52m for up to 4 projects). For further information on the Blue Careers initiative, please refer to the summary of Commissioner Vella’s speech in the context of the European Maritime Day 2016 in Turku under Section A of this report.

Targeted review of the General Block Exemption Regulation: extension to ports

On 10 February 2016 DG COMP passed a roadmap, which intends to simplify the scope of EU state aid rules, codify the existing decision-making practice, abolish reporting obligations, and yield cost savings. To this end, the Commission intends to include ports in the general block exemption within the EU competition laws. The prerequisite for a corresponding change of the general block exemption would be a sufficient case practice.

According to EU competition laws Member State are obliged to have state aids approved by the Commission in advance. Certain infrastructural investments in ports can be affected by this. With the inclusion of ports in the general block exemption could be exempt from notification, given certain prerequisites. If implemented, port projects could be implemented faster and cheaper. The Commission announced two public consultations, including the Member States. However, the roadmap did not contain details regarding concrete changes to the general block exemption, nor regarding the concrete timing.

On 7 March 2016 DG COMP then opened a public consultation to adapt the general block exemption Regulation. It proposes exemptions from the notification obligations for ports. The consultation ended on 30 May 2016. Investment aid in ports for projects up to €100m (€120m for TEN-T ports) shall be exempt from the notification obligations. State aid should under no circumstance exceed the funding gap of a project. Furthermore, the infrastructure has to be available to all users in a non-discriminatory fashion. The following aid intensities are envisaged:

- *Projects up to €20m: 100% aid intensity*
- *Projects between €20m and €50m: 80% aid intensity*
- *Projects between €50m and €100m (€120m for TEN-T ports): 50% aid intensity.*

On the basis of the results of the consultation the Commission will re-write its proposal and launch a second consultation, most likely this fall, before the final EU regulation will be passed.

Port Package III

On 25 January 2016 the Transport Committee of the European Parliament approved the draft report regarding the third port package. Key elements of the report include the financial transparency in ports, as well as rules regarding education and training of port employees and the strengthening of social dialogue (see also previous IMP reports).

In the same vein as the Council, the committee significantly eased proposed rules, for instance regarding piloting and dredging services, which were exempt. With a view to state aid law the EP asks of the Commission to clarify the notion of State aid with regard to the financing of port infrastructures, and to include port infrastructures in the general block exemption regulation with adequate threshold values.

On 8 March 2016 the plenary of the European Parliament submitted its position regarding the proposal for a regulation of the European Parliament and of the Council establishing a framework on market access to port services and financial transparency of ports, and followed the vote of the EP Transport Committee from January.

Safety Rules and Standards for Passenger Ships

On 6 June 2016 the Commission adopted a number of legislative proposals to simplify and improve the common rules on safety of ships carrying passengers in EU waters. The update is a response to lessons learnt, including from accidents, and technological developments.

The revision aims to simplify and streamline the existing EU passenger ship safety regulatory framework, in order to maintain EU rules where necessary and proportionate; ensure their correct implementation; and eliminate potential overlap of obligations and inconsistencies between related pieces of legislation.

An overarching objective is to provide for a clear, simple and up-to-date legal framework that is easier to implement, monitor and enforce, increasing thus the overall safety level.

Commission proposal amending Directive 2009/45/EC on safety rules and standards for passenger ships – Among others, it is proposed to clarify and simplify the safety rules and standards for

passenger ships so that they are, in line with the Commission's REFIT program, easier to update, monitor and enforce. In view of increasing legal clarity and certainty, the proposal also intends to remove a number of outdated, redundant and inconsistent legal references.

The proposal amends the corresponding definitions and requirements of Directive 2009/45/EC.

In addition, the proposal provides for the alignment of Directive 2009/45/EC with the changes brought about by the Treaty of Lisbon in regard of the powers of the Commission to adopt delegated and implementing acts.

Commission proposal on a system of inspections for the safe operation of ro-ro ferry and high-speed passenger craft in regular service – Council Directive 1999/35/EC provides for a number of types of inspection addressing particular safety characteristics of ro-ro ferries and high-speed craft (HSC). These address specific risks related to undivided vehicle decks giving rise to stability and fire vulnerabilities, very intense activity, the risks of cargo shift, water-tightness issues, hoistable ramps and wear & tear.

The requirements of this Directive no longer match the realities and will therefore have to be adopted.

It is therefore proposed to update, clarify and simplify the existing survey requirements for ro-ro ferries and HSC while maintaining the same level of safety and key delivery mechanisms. This is in line with the Commission's REFIT program and aims to further rationalize the inspection effort of national administrations and to maximize the time in which the ship can be commercially exploited.

In this vein, in order to ensure clarity and coherence, the proposal repeals the current Directive and replaces it with a new Directive. It also includes ancillary changes to Directive 2009/16/EC.

C – Shippax Conference Summary

“Grounds for optimism”

(by Jörgen Pettersson) published in Shippax CFI 6/2016

There is a vibrant future in passenger and ro-ro traffic.

It's not a coincidence that 404 delegates and thirty exhibitors participated in the fourteenth edition of the Ferry Shipping Conference that took place on board Silja Symphony, trafficking between Stockholm and Helsinki on 13-14 April 2016. This kind of rallying is a new record and leaves great promises for the future.

Over forty different speakers shared their knowledge, experiences, and analyses during these intense days. After the moderator Bo-Lennart Thorbjörnsson and Tallink Group's CEO Janek Stalmeister opened the conference by tradition; hitting the ship's bell, the floor and opening speech belonged to the main sponsor Anders Rundberg, CEO of Carus:

- It looks brighter in many ways, but we must never be complacent. It is important to continue to work to attract new customers on board, not just those that are recurring. The UK has been successful with joint ventures – such as National Ferry Fortnight, for people to choose the ferries – which we should do in the Baltic Sea as well.

Rundberg went on to highlight the Åland Islands where the IT company, which doubled its business last year, has its headquarters:

- We have since 1850 developed shipping and made Åland to a wellknown maritime hub. Therefore, Carus could be formed in 1999. We live and breathe ferries, both in passenger and cargo operations, and today we have a diversified and global customer base.

Bo-Lennart Thorbjörnsson went on to set the tone for the two days with the heading “Where is the industry now?” He highlighted the fact that many of the world’s shipping companies made very good results last year. DFDS outperformed all time high while the other major actors ie Viking Line, Rederi Ab Eckerö and Tallink Group raised its earnings significantly.

- The vast majority of shipping companies showed noticeable improvement, even in the Mediterranean, and the battle of the channel between P&O and DFDS is over, he said.

There are several reasons but the most obvious one is that there are stronger markets with more purchasing power, low interest rates, trimmed organizations and a low bunker price.

- It is thus, against this background question itself, you ask yourself where all shipbuilding orders are. Are all shipyards full? Are shipping companies unsure of what type of ship suits the future best? Are the fuel costs of the future what baffles shipping companies or have they lost the internal know-how required for new construction projects?

The rhetorical questions will get their answers eventually, and Bo-Lennart Thorbjörnsson added that there are also exceptions:

- Attica, Stena, Destination Gotland and DFDS are some examples of ship owners who has settled the matter and signed new shipbuilding contracts.

After prosperous years there are years of setbacks, but Thorbjörnsson do not think it will happen in the next two three years. However, he does not believe the expected industry consolidation takes place in the short term.

- We may even get to see new shipping companies appear with older tonnage and try to enter the markets, maybe we can even get to see high-speed ferries make a comeback.

One of the reasons that ferry traffic has a brighter future are the travellers wish to be able to move from door to door.

- This can only happen with the help of cars and such cannot be taken on a plane. People want to move around themselves on their vacation and drive to where they want, when they want, he said.

On the cargo side Bo-Lennart Thorbjörnsson noted that growth continues to be stable with the added plus for Poland and the UK, where the quantity of goods has grown considerably. A remaining challenge instead is a lack of suitable second-hand tonnage.

- It has become a seller's market, which is a huge difference compared to two years ago.

To build new is far from uninteresting but the wait is long because the ship yards already have their work sheets fully booked. One solution that more people choose to do is to build in China. Both Stena and Destination Gotland used this option.

- If you want a new passenger ferry you must be prepared to wait five or six years of delivery, he said.

A solution, against this background, is that more and more ship owners are investing more on renovation and renewal of aging tonnage. There is also a clear trend where the onboard experiences of the passengers are highlighted more and more. The digitalization is still in its infancy and the future will be crucial when it comes to attracting passengers. Shipping companies need to be on their toes ahead of the trend.

In summary:

- There are many good reasons for optimism in the industry!

“Sure there is money to make on shipping”

Even directors of shipping companies are increasingly positive about shipping and its potential.

- Sure you can make money in the future, says Tallinn Group's CEO Janek Stalmeister.

But then you have to be attentive to travellers' wishes and requirements.

The first program item was a panel with some of the industry's most influential leaders. Janek Stalmeister (CEO of Tallink Group), Spiros Paschalis (CEO of Attica Group), Mr Grimaldi (Deputy Managing Director of the Grimaldi Group), Niclas Mårtensson (Deputy CEO for Stena Group) and Jan Hanes (CEO of Viking Line) began with a brief analysis.

Stalmeister:

- There are still lots of opportunities to make money in shipping. We see, for example, more travellers from Asia and Latin America that discovers the Baltic Sea. New times require new concepts on board. It is important to keep in constant contact with customers and ensure that we are constantly analysing their needs. Shopping behaviour has changed and the passengers have different needs than before. On the risk side, we have previous competition from low-cost airlines but also the thoughts and plans of Hyperloop, which challenges the entire industry as well as the larger geopolitical uncertainty.

Paschalis:

- Tomorrows travellers have different expectations about us than what we are accustomed to. We must be able to show social responsibility and greater transparency in what we do. It will focus on the Global Distribution System where a call will arrange everything for the customer. Passengers require internet access on board and constant entertainment and personal service. We must also remember that the low price of fuel will not last forever, so we cannot relax when it comes to continuing streamline operations.

Grimaldi:

- I want to thank you for a fantastic event. Shippax and Ferry Shipping Conference is an important gathering for the entire industry, even if we are at an upswing right now, the future is always uncertain. The European shipping industry has environmental, political and strategic challenges to overcome. It may for example include terrorist threats and refugee crises that affect us all. With a close call we've managed to escape the new SECA regulations due to the falling oil price but it has also enabled us, for example in the Mediterranean we see old ships, forty years of age, and more, only picking the cherries out of the big cake. It is not good for anyone. We still have twenty-five ships today and are optimistic about our future.

Mårtensson:

- When it comes to safety, we must never forget to practice and practice and yet again practice. Just by doing that and always following the rules, we avoid new ill-conceived laws. We shall also be proactive in the implementation of new Directives. The

next ballast rules are in themselves good for the environment but have negative consequences. Our ships traveling between Liverpool and Belfast (nationally) are not affected by the rules while running between Liverpool and Dublin (international) must follow them. Although the traffic going over the same sea!

Hanses:

- Ballast Convention is a distraction right now as well as the weak economy in Finland and in Russia. We are also a constant topic of discussion within the Finnish government about state aid which is challenged at every new forming of Government. To handle the customers' requirements when it comes to on board experiences, and because some of our ships are getting older, we are also actively working around the possibility of ordering new built ships. I think it will be a reality within five or ten years.

The panel discussion revolved around the many common challenges and opportunities of the industry.

- Eventually, it is possible to start traffic between the US and Cuba. When that happens, it will be extremely interesting for the entire industry, said Guido Grimaldi.
- If Britain chooses to leave the EU after the referendum on June 23 the only advantage we can resume is the duty-free sales on board! I hope that this does not happen. There is a clear advantage in many other ways than this that the EU holds together, said Niclas Mårtensson.
- If we are about to order new ships? Well, Viking Line, we are a bit old-fashioned when it comes to the balance sheets. But we are investing heavily in the renovation of the existing vessels. I though believe we will place a new building order within the next five ten years, said Jan Hanses.
- It's all about balance when to buy new ships. The old vessels are the ones we can make money off, added Mårtensson.

The issue of joint IT solutions dedicated the interest of the panel. UBER driving taxis without their own cars. Airbnb is a world leader in overnight stays, but does not own hotels and so on. Is it also time for the ferry business to seek similar partnerships? The question is not simple.

- We have invested millions in our own IT-systems. That is not something we will throw away. Our customers are mostly local, and buy our brand. However, when it comes, for example, Asian clients who do not know our circumstances, it could be an idea, thought Janek Stalmeister.
- Internet reservations are clearly increasing, but the dynamics of the system is still missing. In the future I think we need to find global systems for ferry journeys the same way as, for example, made in air transport, said Guido Grimaldi.
- When a system like UBER and Airbnb reaches shipping industry it is clearly a Game Changer, stressed Niclas Mårtensson.

The moderator Bo-Lennart Thorbjörnsson addressed a direct question on how shipping companies are looking to hedge fuel now that the price is affordable. There was no consensus.

- Yes, we have hedged the bunker in a conservative manner. Not as a financial instrument, but bought in advance. So far it hasn't been very successful, said Jan Hanses.
- Yes, we have hedged but if it's good or not, we will know only later, said Niclas Mårtensson.
- No, I know that some see it as a part of business but we don't. Everything is based still on pure speculation. That we are not well served by, said Guido Grimaldi.
- To some extent, about twenty percent, said Spiros Paschalis.
- We have locked a third of our purchases until the end of this year, said Janek Stalmeister.

Europe is moving towards better times

From the financial world came Denise Baum working at KfW IP-EX-Bank GmbH in Germany. She invited a European outlook that looked mostly decent but not lacking challenges.

- The refugee crisis, market volatility and the new Cold War creates ANGST (German expression). And as if that wouldn't be enough put the threat of Brexit into the picture. It would be bad for Britain, Europe and the entire Western world, she said.

However, economic indicators are pointing upward for most European countries. There's a two percent GDP growth and declining numbers of unemployment rates, partly thanks to the structural reforms implemented in some of the earlier countries in crisis.

- It is far from really good but it's for the better. Increasingly private purchasing power should lead to greater investment and more consumption, she summed up.

The countries which are the worst affected are Greece, Spain, Portugal and Italy. They have worked hard on their government finances and are now finally on the right track.

Opportunities in Cuba

Bruce Nierenberg came from the United Caribbean Lines and delivered a speech filled with hope in regard with what happens the day that the traffic between the US and Cuba and Mexico opens. Rush to the ports are to expect for a variety of reasons. The US is the world's largest nation in terms of consumption, and Mexico is its second largest trading partner. In addition, the Caribbean is a continent characterized by long-term political stability.

It is an understatement to call this an opportunity for it is much more than that. Those who are first on the scene have the advantage to reach a market of historic proportions. Cuba is the Caribbean's strongest economy and air travel is expensive.

- Travelling there by sea is guaranteed to become as much as fifty percent cheaper than flying and it will take a lot of capacity when Cuba will be rebuilt, said Bruce Nierenberg.

Tourism in the Caribbean is in constant growth. Last year, the number of incoming travellers to Cuba increased by 17 percent, half of all from the United States. Cuba today has eleven million inhabitants, and before the revolution in 1959, Cuba was number one for American tourists. In addition, there are two million Cuban exiles in the United States that can look forward to easier travel between the countries.

US travel restrictions to Cuba are to disappear before 2017 is over. This is not wishful thinking, but probably crass reality; there are plenty of American companies that want to start investing in Cuba. The conditions are good. Cuba has five deep-sea ports and infrastructure can handle the first ferries to arrive.

Reach customers with WiFi

To deliver what customers want in the future WiFi and smart mobile phones are necessary tools. Jan Erik Norli from Telenor Maritime lined up arguments and evidence on how passengers can be reached.

- It's all about keeping track of where they are on board. When they pass the store, we can reach them with a direct message, he gave as one example.

Today, almost nothing is technically impossible that are commercially desirable. The background is that people love deals and are moreover happy to exploit them.

Major investment for Stockholm

Ports of Stockholm is investing 800-900 million euros in the three major port projects that will take the company and Sweden to the future. It is largely to upgrade three different ports belonging to the company; Värtahamnen in Stockholm, where a state of the art terminal are being completed right now, Kapellskär expanded considerably and Nynäshamn where a completely new cargo port is built.

Deputy CEO Henrik Widerståhl for the Ports of Stockholm gazes with great confidence into the future of the ports of Stockholm, which is currently the fourth largest cargo port in Sweden. On the passenger side, Stockholm is by far the largest with 250 cruise ships

visiting every year. This works strongly in Stockholm's favour. It generates about EUR 550 million every year and create 4,100 jobs. The guests of the hotels in Stockholm are representing as much as 1,000 overnight stays or seven fully booked hotels every day. According to surveys, 95 percent of the visitors are satisfied with their visit to Stockholm, and three out of four is planning to return within five years. Yet it's the same with the ports like much else, they'll have to be there for a long time to come.

- Our plan right now focuses on what should be done about forty to fifty years from now, says Henrik Widerståhl.

This business is still not completely without risks. Stockholm is growing with 35,000 inhabitants per year, and the city is one of Europe's strongest growth areas but the neighbour Helsinki are struggling harder.

- And the Russian market is unpredictable.

Electricity from land connections

As part of the work for a more sustainable society and to save on bunker it is more and more common that shipping companies are looking for shore connections during their stays in ports. Ingemar Gustavsson represents the company Process Control Electric AB which are behind eight land sites in Sweden and Norway and is the European leader in its segment. The largest sites are in Ystad and has an output of 10 MW, which corresponds to about 1,000 electrically heated homes on a normal winter day.

- And also produce less emissions, less noise and lower costs, says Gustavsson.

The payback period on investment is of course difficult to calculate given the variations in oil price, but the savings are substantial and a facility that can fit in a twenty-foot container costs approximately 500,000 euros.

- No traffic interruptions are necessary. Installation takes place during travelling.

Finnlines' view of the future

Grimaldi owned Finnlines is one of Europe's largest shipping lines and closely follows the global trends in trade and economic cycles, something that has never been easy. Marketing and sales manager Staffan Herlin highlights the slow recovery following the economic crisis in Europe and its effects on exports and imports.

- We see infrastructure changes that alter the balance of traffic. In Finland, we are back on the 2009 numbers and have more imports than exports. We've gained back only a third of what we lost then. In Sweden and Germany it is very different, says Herlin.

In addition, there's the sanctions against Russia, which are also hard on the traffic and the SECA regulations that could have been devastating.

- Fortunately the decline in oil price played a positive role and saved us.

Even the cargo routes are changing. More and more goods are shipped on wheels of Via Baltica which Finnlines can sense. The competition is, like always, about price.

- SECA regulations caused more shipments to be moved up on land where there are cheap drivers, cheap fuel and cheap trucks. Had not the price of shipping fuel dropped so much we had suffered an enormous carbon footprint as a result of the traffic on the roads.

This will happen in 2025

In the passenger sector it is important to know your travellers. Not just as they are today, but also how they will behave in the morning and ten years down the road. Ferry investments are extremely long term deals so it's important to bet right from the start. Chief Commercial Officer Janette Bell delivered a future reconnaissance based on her current role and her background from Tesco and Procter & Gamble, two giant chains that constantly analyses its customers.

The trends are, according to Bell, clear. It is about "wanting everything and immediately", convenience and immediate delivery, clicks versus bricks, the new green reality and digital connectivity.

- Growth continues but the costs are being pushed down. Expectations for Just In Time (JIT) will be higher and travellers requiring more sustainability, says Janette Bell, whose recommendation was clear:
- It is time for collaboration and partnership.

“Too many dead corners “

Dr. Bruce Peter works every day at the Glasgow School of Art but is also a true ship enthusiast. He has just recently, after six years of work, put the finishing touches on DFDS large 150-year history book given out this year. It is a magnificent work of 500 pages of text on the shipping company which has grown along with Denmark.

Dr. Peter is not completely satisfied with what he sees on board the ferries of today:

- There are too many dead corners. Some places look like the ones where dogs lies down to die... We should take lessons from the Apple Store, where every place breathes content. Should we manage to attract young people on board we are required to create more atmosphere and better decorations, he says.

There are exceptions and Bruce Peter mentions Silja Symphony and Silja Serenade as good ones with their large arcades amidships.

- It creates a tremendous sense of generosity and it's hard to find a place that doesn't feel pleasant.

Dr. Peter calls for more spas, health and sports. Tomorrow's customer engages less time in drinking contests and more to the wines.

- It is not enough to open up more games corners like many today seem to believe that the young people want.

Container giants for the great

Today's container giants have become too large. It is Henrik Tidblads conclusion as commercial manager in DFDS.

- The infrastructure on land is not enough. Stocks and parking garages are too small for the loads to be handled rationally. The roads to and from the ports are inadequate, he says.

Tidblad also lifts the international refugee crisis as one of the industry's challenges as well as geopolitical developments in Europe and the world. All this uncertainty is also creating new opportunities for those who embrace the digital opportunities in new technology.

- Remote-controlled vessels, optimized propulsion, more automation, cargo handling and so on.

Upgrade vessels often

CEO Anders Ørgård Hansen from OSK-ShipTech A/S made a reconnaissance into the future around RoPax traffic. As key factors, he cites the ability to deal with the new mobile technology, Facebook, social media and their relationship to the purchasing behaviour of customers. He also calls for faster decisions when it comes to constantly upgrading the design board.

- Change the style more often and adapt the design to the customers. It increases sales, recommends Anders Hansen Ørgård.

It is also very important that the shipping company's management and board have insight and interest in digital opportunities.

Shipping is changing and it's important to be part of and embrace the new digital opportunities.

Duty free trade continues to increase

Since the 1980s, the world's duty-free trade, with a few exceptions due to the crisis, has increased. The trade is growing by seven percent (roughly) annually and the sales are those around 65 billion dollars. It is even more than the growth of the number of travellers in the world (+ 6%). Still, there is room for even greater growth,

according to Frederick Lindh, who runs Generation Research and has great insight on the statistics and the future.

- Today only 55 million Chinese have a passport. There are 1.4 billion... When all start travelling you can just imagine the potential, he says.

According to the forecasts duty-free trade should reach USD 125 billion by the year of 2025. The largest product segments are cosmetics, followed by wines and spirits and tobacco. Together they account for nearly 60 percent of sales.

This kind of duty-free sales are mostly happening at airports. Only 3.5 percent of the world's duty free sales are done aboard the ferries, according to Fredrik Lindh. The Nordic countries however are different. There ferries account for about 40 percent of all duty free sales. The trends in the Nordic countries are similar to those in the world. All travellers plan their purchases in advance and are also willing to pamper themselves.

- That fact requires communication before they come on board. When that happens they have already decided.

Although the price of the products obviously play the role, and this is where the smart phones come into the picture. Twelve percent of the passengers compare prices directly in their handsets.

- The shopping is clearly a part of the travel experience.

Understanding digital marketing?

The question about the shipping companies real approach to digital marketing is rhetorically asked by John Crummie as a consultant in the industry. He answers himself:

- It could be much better. 48 percent of the travel industry describes itself as “fast followers” when it comes to digital technology. It takes advantage of the mainstream trends to avoid risks. That's why it can sometimes move a little too slowly.

80 percent of European passengers make their travel bookings today directly on the Internet. 89 percent of adults have a cell phone and 66 percent of those are smartphones. The digital trend is unstoppable and therefore with the Internet of Things in the future there will

be many more opportunities. Among those who are traveling, it is even clearer. Nine out of ten carry a smartphone.

- Is there sufficient digital capacity in the boardroom? It is an important issue for the future, says John Crummie.

Think about search engines

Victor Velton works on Versonix and states that Search Engine Marketing is essential for success.

- A Majority of people are using search engines to make purchasing decisions'. Companies such as Google understands this and therefore make it more difficult and costly to reach customers.
- It is important to avoid digital fluff, it should be easy and fast.

New companies coming up

From IESE Business School came Koert Grever to inspire a new vision of the world. He brought up some examples of companies that in a short time changed the whole industry. UBER is the world's biggest taxi company but does not own a single car. Facebook is the world's largest media company, but produces no content. Alibaba is the world's largest retailer, but do not have a warehouse. Airbnb is the world's largest accommodation provider but does not own any real estate.

When this happens in the shipping industry all that is taken for granted today changes. Therefore, it is important to constantly monitor developments and act quickly.

- A common rule is to overestimate what you have time to do within a year while underestimating what you can do in five years, says Koert Grever.

Lobbyist top tips

Magnus Ehrenberg is from Sweden, he is based in Germany and belongs to Shippax most prolific contributors. It's not that strange. Lobbying requires contacts and lots of friends. His company Ehrenberg Communications is working with both governments, companies, and everything in between. His message is clear. Keep constant contact with politicians if you want them to listen to your arguments.

What is a lobbyist? The lobbyist is an influencer, trying to affect decisions that are favourable to their clients. Lobbyists can be individual citizens, organized interests groups or businesses. Does lobbying work?, Magnus Ehrenberg asked and gives the answer by quoting Ann-Therese Enarsson who ran the campaign to ban smoking in bars and restaurants in Sweden in 2004:

”Before I started, I imagined bought people who ran in the corridors of Brussels. But the more I think about it, I realize that it is about pursuing an issue over a long period of time. The fact is, that a lobbyist can just be a committed enthusiast. It's exciting when you discover that individual people can actually make a difference.”

Magnus Ehrenberg finally offers some things to consider when it comes to influencing:

- Focus on few and specific questions.
- Select a spokesperson.
- Find a strategic partner to raise your questions together.
- Be open and honest.
- Combine with efforts on social media.
- Find political ambassadors.
- Reach out before any problems occur.

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