



DANISH
MARITIME
FORUM

2016

The New Normal

Copenhagen
26-27
October

What will the future
of the global maritime
industry look like
when the fundamentals
are changing?

The New Normal: What will the future of the global maritime industry look like when the fundamentals are changing?

On 26-27 October 2016 the Danish Maritime Forum will convene key leaders from across the global maritime industry to work together on unleashing the potential of the global maritime industry in order to increase long term economic development and human wellbeing.

The Danish Maritime Forum 2016 will take place at a time when the future of our industry looks more uncertain and more unpredictable than ever. Fundamental shifts in the economy and technological advances are transforming the industry as we know it, and at an unprecedented pace. The future belongs to those who succeed in tapping into the opportunities that this transformation presents.

For the first time in decades, growth in world trade is falling below global economic growth. Although the global economy has continued to expand, it is doing so at rates lower than we might have expected after the recovery. Economic prospects in key emerging markets remain uncertain and it is not obvious where a powerful new engine of growth is to be found. Coupled with the industry's overcapacity, this unexpected slowdown in demand is widening the supply-demand gap, with low freight rates and stagnating new order books to follow.

There is no indication that this trend will be short-lived. We may be entering a phase of profound uncertainty in the evolution of the global economy. Regionalism is on the rise and an increasing number of state and non-state actors are jockeying for power, resources and other strategic gains. The rise of protectionism and isolationist sentiments are eroding the very basis for global collaboration. It is undermining the ability to address structural shifts in the global economy and to make the growth more inclusive. Governments are failing to coordinate monetary and fiscal policies and appear unwilling to forge new trade deals, hampering the business community's ability to expand cross-national supply chains.

At the same time, the global system of production and distribution is undergoing a profound transformation. New technologies are emerging more quickly than we can imagine them. The digitization of everything coupled with the accessibility and affordability of even the most complex of technologies is spreading technological change farther and faster than ever before. Platform-based business models are challenging many traditionally asset-driven industries. This will have far-reaching societal and economic consequences.

At the Danish Maritime Forum we will discuss the impact of these changes on global value chains and how the maritime industry can work together to manage the risks and reap the rewards of this transformation and increase long term economic development and human wellbeing.

Join us in Copenhagen to unleash the potential of the global maritime industry.

DAY 1

12:30-13:45

HISTORY OF THE FUTURE

Looking back, looking forward: what are possible future inflection points - events that will have a significant impact on the global maritime industry.

**REGISTRATION & NETWORKING**

11:00-12:30



16:00-17:30

THINK TANKS

In parallel ThinkTanks, participants explore new research, technologies, ideas, concepts and practices and discuss how they will impact the global maritime industry in the future.



14:00-15:45

SETTING THE CONTEXT

A global economic outlook: what drivers and obstacles, risks and opportunities could affect the outlook for growth for the global maritime industry?

17:45-18:30

KEYNOTE

10:45-11:15

WORK IN TEAMS

Groups work on solutions for the topics and challenges they have defined.



10:15-10:45

DEFINE YOUR WORK

In groups, participants define the specific solutions they will work on, and the deliverables they will provide by the end of the day.



9:45-10:15

SELECT YOUR TOPIC

Participants sign-up for the topic they would like to work on solving.



9:15-9:45

IGNITE TALK

An inspiring point of view to kick off the day's work.



13:15-14:15

THE GLOBAL MARKETPLACE

All groups share their work in the Global Marketplace to get inputs, identify possible collaborations and highlight areas where they can contribute to unleashing the potential of the global maritime industry.



14:15-14:45

FINALIZE SOLUTIONS

Based on inputs and learnings, groups finalize their work and summarize it into a format that will be presented to the rest of the Forum.



15:00-15:45

FISH BOWL

Groups share their solutions, reflections and suggested ways forward.



15:45-16:15

KEYNOTE

An industry expert reflects on the work done and what is needed to succeed.

**CLOSING**

16:15-16:30

**INTRODUCTION TO THE DAY**

9:00-9:15

**DAY 2**



» I am pleased to welcome you to the **Danish Maritime Forum**. The maritime industry plays an important role in securing a better future for us all. It is the backbone of world trade. However, the maritime industry is facing the challenge of unpredictability, which calls for greater global cooperation, and this is exactly what we hope to achieve with the Danish Maritime Forum.«

Troels Lund Poulsen
Danish Minister
for Business and Growth

Collaboration across all parts of the global maritime value chain

The Danish Maritime Forum brings together key leaders from all parts of the global maritime value chain with government officials and other influential decision-makers and opinion shapers. Together they will generate new ideas and solutions to the most important long term challenges facing the industry. This cross-industry and multi-stakeholder approach aims to challenge the traditional silos within the global maritime industry to strengthen cooperation between all stakeholders and to identify new strategies to address long term threats and opportunities. In order to support this, the Danish Maritime Forum provides a creative workspace to exchange views, learn from each other and give birth to decisions that make a real difference not only for the industry, but for society as well.

An inspirational and engaging format

The format of the Danish Maritime Forum is designed to inspire and engage participants in a dialogue about the future of the global maritime industry. A number of high-level panel discussions and key notes featuring key business leaders, top government officials and prominent experts will set the context and highlight the most significant challenges and opportunities in the global economy. The Forum is highly collaborative and participants are invited and expected to contribute actively to a lively debate throughout the two days.





» The shipping industry is undergoing profound changes with CMA CGM as one of the key players with the proposed acquisition of NOL and the future Ocean Alliance. We are also faced with volatile freight rates. It is necessary to have a forum such as this one, where all the players can discuss the challenges ahead.«

Rodolphe Saadé
Vice Chairman
CMA CGM

Looking into the future

Five eye-opening Think Tanks will introduce new ideas and concepts, cutting edge research, thought leadership and best practices that are likely to disrupt the world as we know it and provide new perspectives from outside the maritime industry.

• What's next for the global economy

From China's financial stability to the fragility of key emerging markets. From the impact of negative interest rates to oil prices. What are the most important global developments to watch – and what will be their impact for the maritime industry?

• Shifting trade patterns

Regionalism on the rise, a new wave of protectionist sentiments in key markets and a dearth of truly effective global institutions spell trouble for globalization. What will be the impact on global trade?

• Disruptive technologies

From advanced robotics to artificial intelligence, futuristic technologies are set to disrupt entire industries. What will be the impact of this technological revolution on global value chains?

• Transformative change

Technology is rapidly transforming the fundamental nature of many companies in a wide range of industries. How can the maritime industry make the leap from product to platform?

• New demands

New demands – from changing consumer preferences to tightening regulation – are reshaping many industries. What risks and market opportunities does this present for the global maritime industry?

From ideas to action

Working together on issues that will have major long term impact on the global maritime industry is a cornerstone of the Danish Maritime Forum. This year's gathering will encourage ideas generated at the Forum to be taken forward after the meeting. Working groups will not only be focused on identifying new solutions and cross-industry collaborations, but also on practical next steps to take ideas forward. Issues on the agenda include:

- How can the maritime industry contribute to advancing sustainable economic growth to the benefit of all?
- What is the untapped potential offered by new technological advances and how will it be realized?
- What will it take to meet the long term goal of decarbonizing shipping?
- How can the maritime industry attract the best and brightest and develop new talent to build the workforce of tomorrow?
- What will it take to advance collaboration, transparency and high standards across the maritime value chain?
- How will the industry have to adapt its business model to access capital in the future?



» Milaha looks at the difficult environment as a great opportunity to grow and to build a stronger, more competitive company for the future. At the **Danish Maritime Forum**, I look forward to sharing our insights on how companies can benefit from the downturn, and also hear from our peers on how to navigate through the uncertainty. «

Abdulrahman Essa Al-Mannai
President & CEO
Milaha

Schedule for the Danish Maritime Forum

Tuesday 25 October

17:00-19:00 Danish Maritime Days
 Welcome Reception

The reception is kindly hosted by Ericsson

Wednesday 26 October

11:00-12:30 Registration
 and networking

12:30-13:45 Working lunch

14:00-15:45 Opening plenary

16:00-17:30 Working sessions

17:45-18:30 Keynote

20:00-23:00 Danish Maritime Forum
 Gala Dinner

The gala dinner is kindly hosted by the Maersk Group

Thursday 27 October

09:00-09:45 Plenary session

09:45-12:15 Working sessions

12:15-13:15 Lunch

13:15-14:45 Working sessions

15:00-15:45 Plenary session

15:45-16:15 Keynote

16:15-16:30 Closing plenary

The program for the Danish Maritime Forum is still in development and may be subject to change.





» The maritime industry faces three huge challenges of excess capacity, poor financial performance and the threat to trade if globalisation retreats in the face of political change in key countries. Yet maybe this is the real opportunity for industry leaders to bring about a much brighter future for the industry. By taking the difficult decisions to create a 21st century maritime universe that serves but is not subservient to its customers, that embraces technological innovation and sensible regulation, that chooses profitability over market share and achieves this by competitive collaboration, all stakeholders in the maritime sector and wider society will benefit. The **Danish Maritime Forum** is where the discussions can give birth to the decisions that can lead to this brighter future. «

Michael Parker
Managing Director
Global Head of Shipping, Citi





» Despite the headwinds in the global maritime sector and the oil and gas markets, now is the time to seize opportunities to reduce costs, strengthen capabilities and develop new sustainable solutions for the industry. Keppel Shipyard has been looking at ways to provide greater value to ship owners, and the **Danish Maritime Forum** is a good platform to further discussions on leveraging innovation and technologies to improve efficiencies. «

Michael Hock Chye Chia
Managing Director
Keppel Offshore & Marine

Date and Venue

26-27 October 2016

Terminal 1
Oceankaj 4 & 6
2150 Nordhavn, Copenhagen
Denmark

Participation in the Danish Maritime Forum is by invitation only. All working sessions are conducted under Chatham House Rules.

Accommodation

We encourage you to stay in one of the official hotels so that you may take advantage of the free shuttle service between the venue and your hotel. Rooms can be booked when registering for the Danish Maritime Forum.

Transportation

Shuttle services will be provided free of charge between the designated hotels, the meeting venue and the official evening programme.

Further information

To learn more, please visit www.danishmaritimeforum.com or contact Head of Development Johannah Christensen at joc@danishmaritimedays.com.

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Press

Selected sessions of the Danish Maritime Forum will be open to the press. Press related inquiries should be directed to Head of Communications Torben Vemmelund at tve@danishmaritimedays.com.

About the Danish Maritime Forum

The Danish Maritime Forum is organized by Danish Maritime Days, a non-profit public-private partnership between the Danish Maritime Authority, the Danish Shipowners' Association and Danish Maritime. Our mission is to unleash the potential of the global maritime industry.

Funding

Danish Maritime Days is supported by the A.P. Møller Relief Foundation, the Danish Maritime Fund, the Danish Ministry of Business and Growth, D/S Orients Fond // D/S NORDEN, the Hempel Foundation, the Lauritzen Foundation and the Torm Foundation.

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