

Navigating Challenging Waters



Copenhagen,
7-8 October 2015



“We have the necessary foundations to have a very successful shipping industry; we cannot work in isolation and the best way to face our challenges is if we cooperate, communicate with each other and improve the way we do business.”

Arsenio A. Dominguez,
Ambassador and Permanent Representative of Panama
to the IMO and Chairman of MEPC



IMO

- EVOLVING INDUSTRY
- CHANGING STRUCTURES
- NEW REGULATION
- MECHANISMS

IMAGE AMBASSADORS

INITIATIVE & LEADERSHIP





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Foreword

I am proud to present to you the Danish Maritime Days report "Navigating Challenging Waters".

The maritime industry plays an important role in securing a better future for all of us. It is the backbone of world trade, and a cheap and clean form of transportation.

Therefore, it is critical that the full potential of the industry is unleashed. And this is what Danish Maritime Forum is all about.

At this year's forum, more than 200 key stakeholders met to discuss the future of the maritime industry. Three things stood out from the discussions.

First, we must cooperate to ensure open markets and free trade. Human wellbeing and continued growth relies on goods being transported freely.

Secondly, we must cooperate to ensure relevant international regulations and global enforcement. Without this, we risk that the safety of our seafarers and the protection of the marine environment is undermined.

Thirdly, we must make sure that the burdens we put on the maritime industry are not greater than the benefits we seek to obtain. We need to find the right balance and make room for the industry to find new solutions.

It is important that we continue the global dialogues from the Danish Maritime Forum.

Therefore, I encourage you to take the spirit of cooperation and creativity from the Danish Maritime Forum with you into your daily business. And I look forward to seeing you again in Denmark next year.

*Troels Lund Poulsen,
Minister of Business
and Growth,
Denmark*



Working Together

On 7-8 October 2015 more than 200 industry senior leaders, government officials and other influential decision-makers and opinion shapers from across the global maritime industry assembled in Copenhagen for the second Danish Maritime Forum. The Forum is convened by Danish Maritime Days, a public-private partnership between the Danish Shipowners' Association, Danish Maritime and the Danish Maritime Authority. Building on the insights and outcomes of the inaugural Danish Maritime Forum in 2014, the ambition was to address the need for collaboration across the entire industry in order to unleash its global potential. Several distinct cross-cutting patterns emerged from discussions at the 2014 Forum. They formed the basis for the five topics addressed at this year's Forum: innovation, human capital, emerging markets, the image of the industry, and governance.

Key messages from the Danish Maritime Forum 2015

Once again, the Danish Maritime Forum provided a participatory format that was focused on brainstorming collaborative approaches to common challenges. The main focus at this year's Forum was on what steps might be taken to strengthen cooperation between all maritime stakeholders to benefit the industry at large. Against a backdrop of heightened uncertainty and dislocation in the global economy, the Forum's participants discussed strategic challenges, learned from the experts in their midst and indeed from each other, and worked together to identify concrete initiatives and next steps to address such critical issues as the imperative to innovate, how to attract the next generation of maritime leaders, how to improve the public's perception of

the industry, opportunities and challenges in investing in emerging markets and the future governance of the industry.

Most participants at this year's Forum agreed that **frontrunners in the industry should take the lead to proactively address the most important challenges the industry is facing**. Working together, industry leaders - a coalition of the willing - could do a lot to advance collaboration, transparency and high standards across the industry and proactively engage with policy makers on the regulatory landscape of the future.

While there was no clear consensus about who should drive this effort, many participants pointed to the importance of the many sector-specific organizations and that encouraging their **closer coordination** could leverage their respective strengths to deliver shared messages and set common standards for the entire industry.

Participants across all working groups highlighted **the need for a more open and transparent approach in this traditionally inward-looking industry**. Sharing data and insights could inform policy discussions, improve environmental performance and awareness, and lead to increased efficiency, reductions in costs and raise profits along the way. A more transparent approach could also contribute to raising awareness about the role and importance of the entire maritime value chain in the global economy and thus help shift the public perception about the industry into a more positive direction.

Finally, many participants underscored **the value of trade-wide, global forums** that provide an opportunity to exchange ideas and engage with peers from across the industry on key issues.



A photograph of Koji Sekimizu, Secretary-General of the IMO, speaking at a podium. He is wearing a dark suit, a white shirt, and a red patterned tie. He has a microphone clipped to his lapel and is holding a small white card in his right hand. The background is a large screen displaying a blue, abstract, textured image. The text is overlaid on the right side of the image.

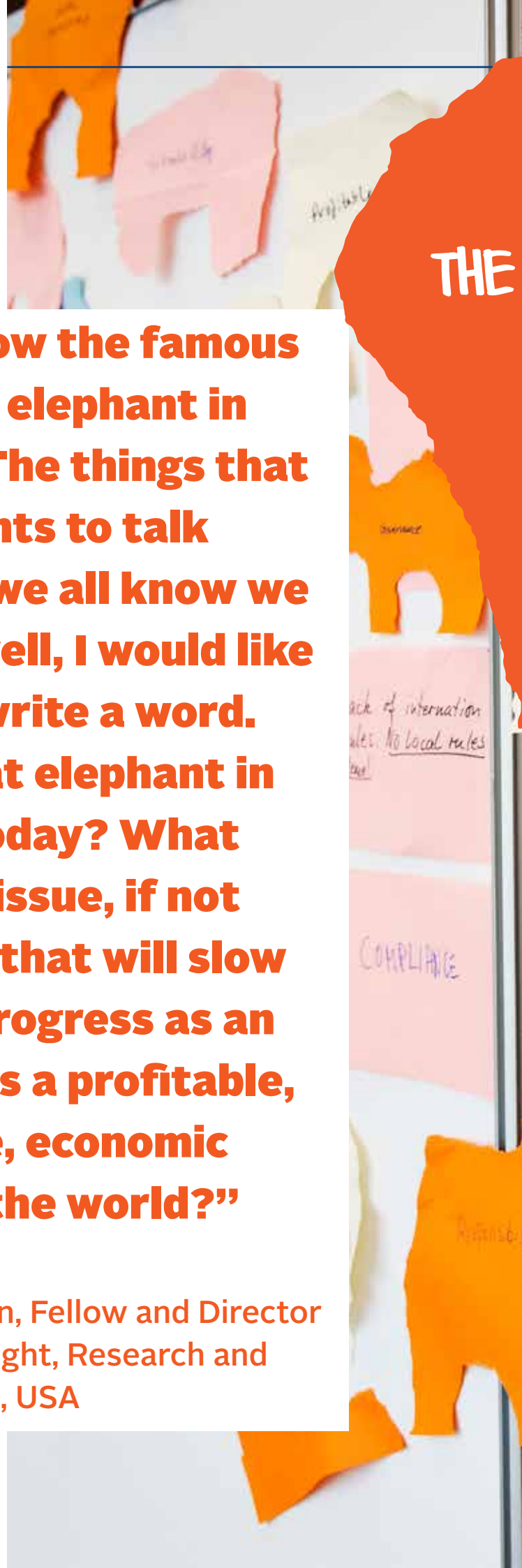
“This Forum is very unique. It is the Forum of leaders from the shipping industry and governments.”

Koji Sekimizu, Secretary-General, IMO



“You all know the famous phrase ‘the elephant in the room’. The things that nobody wants to talk about, but we all know we need to... well, I would like for you to write a word. What is that elephant in the room today? What is that one issue, if not addressed, that will slow down our progress as an industry - as a profitable, sustainable, economic engine for the world?”

Chris Luebke, Fellow and Director for Global Foresight, Research and Innovation, Arup, USA



ELEPHANT IN THE ROOM



IMAGE

DEBT

oversupply & cyclicality

TONNAGE

OVER SUPPLY

OVER CAP

CHINESE ECONOMY

A Voyage of Collaboration

The past year did not provide the smooth sailing we had hoped for. Of course change is a constant, but the context of change is variable. Together, global maritime industry is better equipped to understand the context than when operating alone in individual silos.

Koji Sekimizu, Secretary General of the International Maritime Organization kicked off the Danish Maritime Forum with his reflections on key developments since he gave his closing remarks at last year's Forum.

This was followed by a seriously playful exercise in which we tore an elephant out of paper behind our backs. The "elephant in the room" represents those issues that, if not addressed, will slow down our industry's progress. Collaboration requires the honest sharing of issues and assumptions that we collectively face.

We then headed to the workspace area. We identified the characteristics, needs and untapped potential for our part of the system, be that as a policy maker, a customer, a terminal operator, an investor or a shipowner.

Our groups now changed course to hear global input in seven different briefing sessions, each highlighting important developments that could have a big impact on our industry and that would inform our discussions later in the day. A highlight of the Forum followed: a conversation between the Chairman of the Suez Canal Authority, Admiral **Mohab Mameesh** and Administrator of the Panama Canal Authority, **Jorge Quijano**, elaborating on their respective expansion plans and how they might advance global connectivity.

Ministers representing **Ghana**, **South Korea**, **United Kingdom** and **Denmark** then provided



The format of the Danish Maritime Forum is highly collaborative and the on the agenda. In addition, the program includes briefing sessions with conversations with leaders in the industry who share their thought featuring top government officials, business leaders and prominent maritime industry. Participants are invited and expected to



The program primarily consists of working sessions focusing on the issues leading experts to inspire and challenge the discussions as well as informal professional or personal challenge. A number of panel discussions will focus on what is required to unleash the full potential of the global industry to a lively debate throughout the two-day program.

additional global insight on the future of our industry.

It became increasingly clear that the issues we face could only be solved through deep industry collaboration. We headed back to the workspace to new groups that comprised all parts of the global maritime industry. We viewed our industry through five cross-cutting topics, each of them essential to our success: the imperative to innovate, how to attract the next generation of maritime leaders, how to improve the public's perception of the industry, opportunities and challenges in investing in emerging markets and future governance of the industry.

To provide a new perspective on the importance of the voyage we as an industry have embarked on, **HRH Crown Prince Frederik of Denmark** offered his insights about our future.

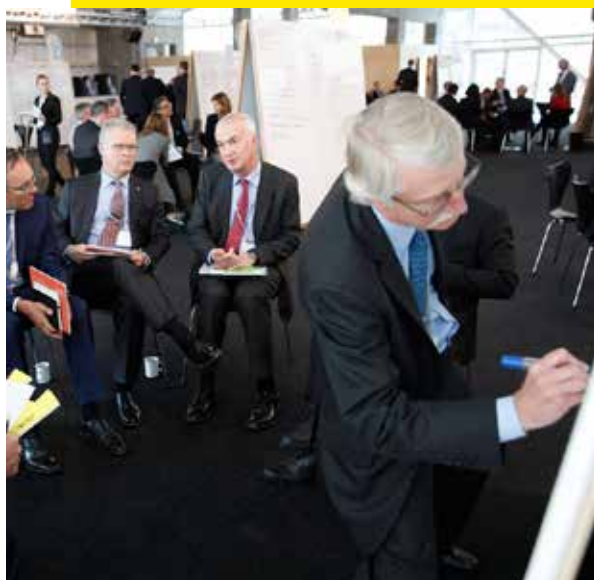
But what if the future unfolds in ways we had not foreseen? Economist and author **Dambisa Moyo** and former BBC World News presenter **Nik Gowing** each offered a sobering scenario that challenged our view of what lies ahead.

We brought all of this knowledge with us as we headed to a delightful evening at the Royal Opera House, and continued our stimulating conversations.

Coming back day two, we were well equipped to finalize our intentions and ideas. With the help of graphic facilitators, we synthesized our work into pictures and words in a way that allowed our fellow participants to get a good overview of the discussions on all topics.

Informal Fireside Chats allowed us to enjoy some final insights and advice on topics as diverse as what lies ahead for Iran, when Boards fail and what to expect from the IMO.

Finally, we concluded with a presentation of the outcomes of our work over the past two days and some final reflections from three of our esteemed industry peers - **Claus Hemmingsen** of Mærsk Drilling and the Danish Shipowners' Association, **Michael Parker** of Citi and **Randy Chen** of Wan Hai Lines - on what might be the next steps to turn our discussions into action.



Working Group Outcomes

Throughout the Danish Maritime Forum, participants worked together in a collaborative format that challenged the traditional silos within the global maritime industry. Building on the insights and outcomes of the inaugural Danish Maritime Forum in 2014, the main focus at this year's Forum was on what steps might be taken to strengthen cooperation between all maritime stakeholders to benefit the industry at large.

Working in small groups, participants addressed the following challenges:

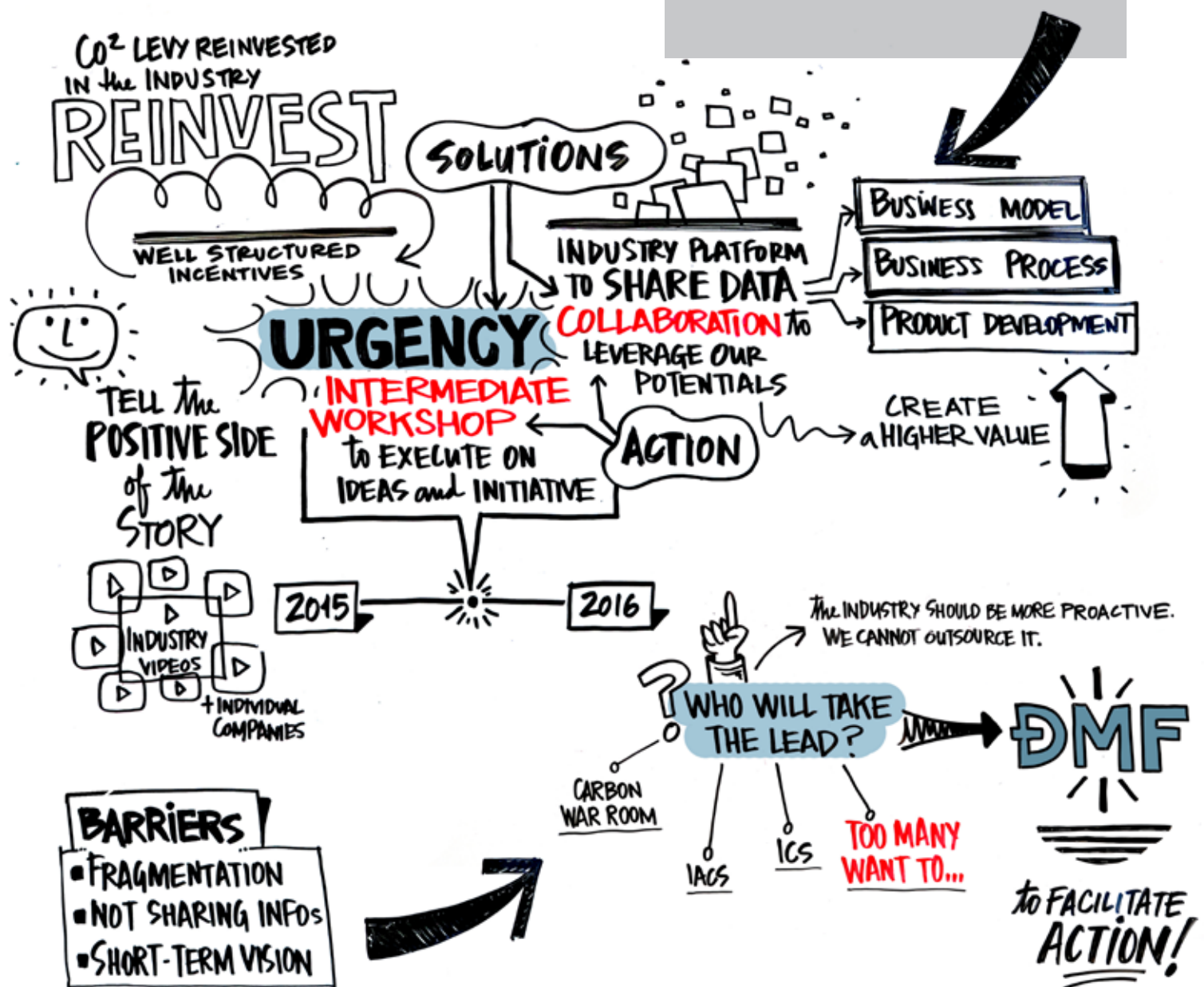
- **Governance.** How can the maritime industry create a more collaborative environment between its many stakeholders and be proactive in shaping regulation?
- **Human Capital.** How can the entire maritime industry collaborate to prepare today's workforce for tomorrow's jobs?
- **Emerging Markets.** What will it take for emerging economies to realize their potential? How can the maritime industry strengthen its role and positive impact?
- **Image.** How can the maritime industry raise its profile and improve its image in the public eye?
- **Innovation.** How can the maritime industry set a new course for growth through technology and innovation?



How can the maritime industry set a new course for growth through technology and innovation?

- How do we catalyze technological innovation and remove barriers to change?
- What are ways to incentivize early adoption of new technologies?
- How do we leverage data to overcome inefficiencies and focus on common, critical challenges?

Innovation



“We need to be more proactive. We cannot outsource the future of our industry.”

Participant in the Danish Maritime Forum.



All groups agreed that there is an urgent need to make the business case for innovation in the maritime sector. In the current economic climate, only firms with strong cash positions can afford to invest significantly in innovation across their business lines, an indication that the maritime sector needs to work with the financial community to create financial incentives that would properly value innovation. Moving from a project-driven to a product-driven mindset within the industry and lengthening the time horizon for investments from short- to long-term are two more shifts that could drive innovation. Barriers to innovation include the traditional and risk-averse nature of the industry, lack of cooperation, prescriptive regulation, a misalignment of agency and incentives as well as the fact that the maritime industry historically is a low-margin sector, where lack of scale is generally a barrier to realizing significant gains.

Several groups also pointed out that supply chain partners in some cases can be better at innovating together than competitors. That said, all groups highlighted the need for collaboration and data sharing to tackle big challenges and reap the benefits of new solutions.

Ideas to take forward

- Create an innovation-focused think tank for the maritime community that will work to establish the business case for innovation by:
 - Working with the financial community to understand the innovation cycle and to reflect that reality in the terms of

capital extended to firms.

- Building partnerships across sub-sectors to encourage blue-sky thinking.
- Demonstrating that investment in innovation is valuable to the bottom line.

- Establish a platform to share data and insights on environmental technologies to increase efficiency, sustainability and profitability. Could also be used to identify and address other common challenges and spur innovation.
- Leverage big data to enable standardization across the industry, e.g. of ship design, which could have significant implications for scheduled maintenance, fleet management etc.

Way forward

Several groups were highly motivated to act on the ideas developed during the Forum. They proposed to organize a small team of industry stakeholders to further develop their ideas (e.g. at a mid-year workshop), to scope initial projects and secure funding. The results would be shared back with all participants at the next Forum in 2016.

Human Capital

How can the entire maritime industry collaborate to prepare today's workforce for tomorrow's jobs?

- What will it take to raise the profile and image of the industry to attract new talent?
- What is critical to include as we educate the next generation of change makers?
- How do we ensure that new education models break from the traditional ways we have trained in the past?
- How might industry disruptions impact employment and skills?



“If you want to know how the world works, the maritime industry is the right place to be.”

Participant in the Danish Maritime Forum.



The global maritime industry, like many other industries, is facing tough competition for the best and the brightest to join its ranks. Participants discussed a wide range of contributing factors, from a demographic deficit in many parts of the world – with notable exception of Africa – to the fact that the industry as a whole suffers from a relatively poor image.

Several groups discussed a shift in aspirations and expectations of those entering the workforce today. This includes employees on shore and at sea, where jobs today have to be seen as meaningful and provide a reasonable income and job security to attract new talent. Some groups also pointed out that the nature of many jobs is changing – through technology, regulation etc. – which has an impact on the skills required by entrants into the industry.

Ideas to take forward

- Create an innovation-focused think tank. Launch a torch relay with the purpose of ensuring that the maritime industry gets its share of emerging talent. The torch would be passed between key stakeholders in the maritime industry – industry organizations, media, leading companies, schools and universities – who each in turn take it upon themselves to launch an initiative that raises awareness about the industry and the opportunities it offers amongst the target audience.
- Raise the profile of the industry vis-à-vis the next generation entering

the workforce by sharing stories that highlight the characteristics, benefits and opportunities in the industry that are important to young people today. This includes characteristics such as ethical, challenging, experiential, connected, safe, and rewarding.

- Prioritize employee engagement and adapt company policies and practices to changing aspirations of the workforce.
- Focus on developing and attracting talent from Africa, which enjoys a large share of youth and thus a rapidly growing workforce.

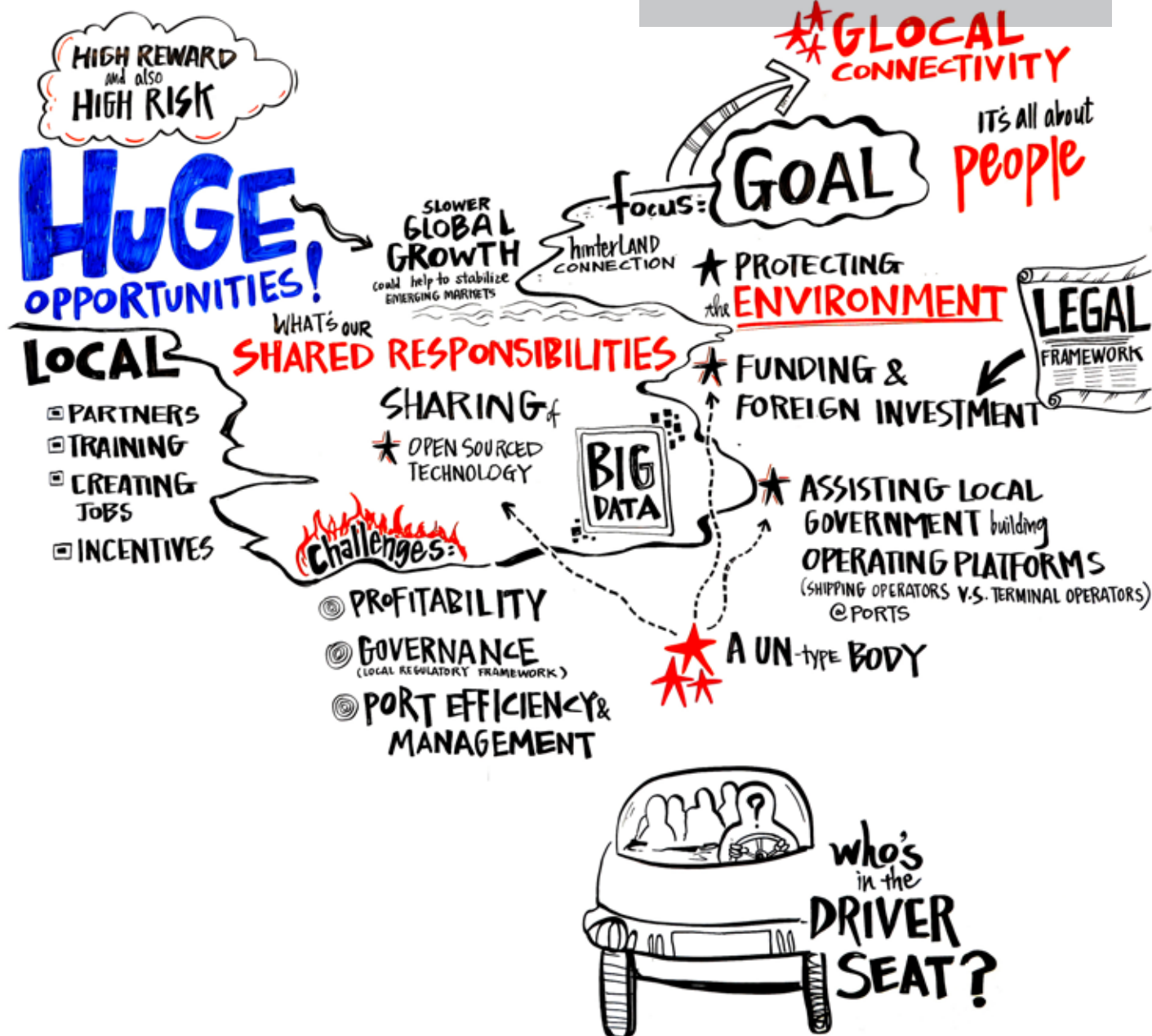
Way forward

Several groups suggested that the leaders in the industry – many of the represented at the Forum – should take responsibility in this matter and work together to move some of the ideas generated in the discussions forward. Collaboration, sharing of best practices and benchmarking could also be led by the leading industry organizations.

Emerging Markets

What will it take for emerging economies to realize their potential? How can the maritime industry strengthen its role and positive impact?

- How might the maritime industry help to advance economic corridors?
- What are ways that supply chain barriers to trade might be overcome?
- What are the ways that emerging markets contribute to building a competitive workforce globally?
- In what ways might emerging markets enhance good governance practices for our industry?
- How might emerging markets develop maritime growth strategies?



“By accepting country risks, the maritime industry can help emerging markets build societal structure.”

Participant in the Danish Maritime Forum.



Participants across all groups recognized that the maritime industry has the potential to play an important role in creating sustainable growth in emerging markets. To prosper, emerging economies need investments in infrastructure, but also in human and institutional capacity as well.

As the backbone of international trade, the maritime industry has an important role and a responsibility to make long term and sustainable investments that benefit all. Emerging markets are likely to experience increased attention from investors - including from the maritime industry - due to their relatively attractive long term growth potential compared to more established markets.

Several groups pointed to strong foundations of political, legal and financial stability, a well-trained workforce that is incentivized to stay and contribute to the economy in the long run and modernization of infrastructure as key elements in ensuring profitability and thus attracting significant and sustained investment from the maritime industry.

Some groups discussed the important role of technology in emerging economies. On one hand, the targeted use of technology could greatly improve efficiency and market access; on the other, technology can also be expected to reduce the need for workers, especially low-skilled workers, an important consideration when working with local populations to ensure proper benefit from foreign investment. Another group discussed whether consolidation and rationalization in the industry would reduce interest in emerging markets, at least in the short- to medium-term.

Ideas to take forward

- Leverage regional collaboration in emerging markets to increase investment in infrastructure and develop economic corridors. Regional economic communities or other international bodies could lead this effort and draw on local industry expertise from companies invested in the region. This could also improve transparency, reduce red tape and lead to common standards, all elements that would make emerging markets more attractive to investors.
- Actions that optimize the supply chain and reduce logistics costs will enhance the benefits accrued from global trade and drive sustainable growth that benefits all.
- A focus on public-private partnerships and engagement with local authorities and civil society will create projects that will be beneficial to all parties in the long run. This can include activities designed to build local competencies, engage local suppliers, and support small businesses.

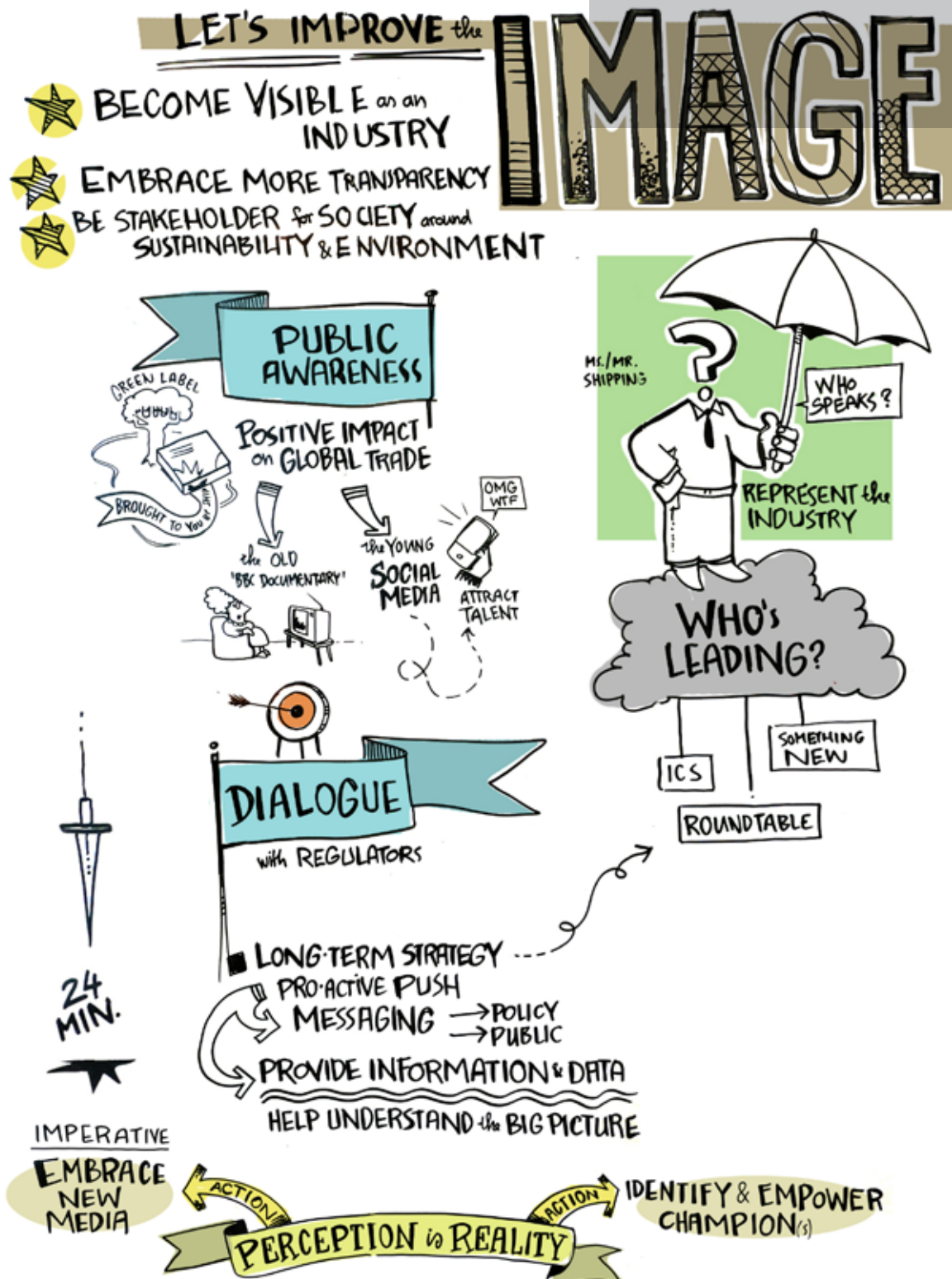
Way forward

Several groups pointed out that maritime decision-makers would benefit from developing a better understanding of emerging markets and their respective competitive advantages. Terminal operators are often at the forefront, making investments on the ground. They may be well-placed to engage with regional organizations in setting standards that accommodate the goals of both local governments and investors.

Image

How can the maritime industry raise its profile and image in the public eye?

- How do we raise awareness about the role and importance of the entire maritime industry?
- What are the ways that we can demonstrate the value and integrity of the industry to our multiple publics?
- What will it take to change the minds of the doubters?



“Our poor image leaves the maritime industry vulnerable and at risk.”

Participant in the Danish Maritime Forum.



A consensus quickly emerged among participants that the maritime industry needs to improve its ability to present itself and its issues to policymakers and regulators in a unified manner. Operating principally in the business-to-business space has allowed the maritime industry to operate under the radar for a long time, maintaining a relatively low profile considering its vital role in global trade. All groups agreed, however, that the relatively poor image of the industry - or complete lack thereof - leaves it vulnerable and can be a real impediment to achieving policy objectives. It is also making it harder to attract talent.

The fact that the industry has long benefited from a low profile was a commonly cited barrier to improving the image of the industry. Fragmentation and the lack of clear unified messages was also pointed out as a challenge, for example in achieving a fruitful dialogue between the industry and its regulators, customers and other key stakeholders. Other barriers include the conservative and inward-looking nature of the industry and lack of knowledge about its important role in the global economy.

Ideas to take forward

- Create a unified voice to clearly articulate and deliver a common narrative for the maritime industry. A “fit for purpose” industry representative body that could engage in dialogue with regulators, set industry-wide standards, endorse and reward best practice etc. This body should focus on long-term, positive policy making rather than short-term, reactive thinking.

- Develop shared industry messages focused on issues such as quality, safety, environmental standards, etc.
- Identify and empower champions to deliver common messages, showcasing successes as well as areas for improvement. This will require a shift to a much more transparent approach and information sharing across the industry, both externally and internally.
- Use media proactively, especially social media.
- Develop a product label, like the fair trade sticker, “Brought to you by ship” to showcase the important role of the maritime industry in global trade.

Way forward

All groups agreed that a more coordinated approach with shared messages will require better cooperation between existing industry bodies, combining technical and political competencies of some organizations with the communication capacity of some of the large multinationals.

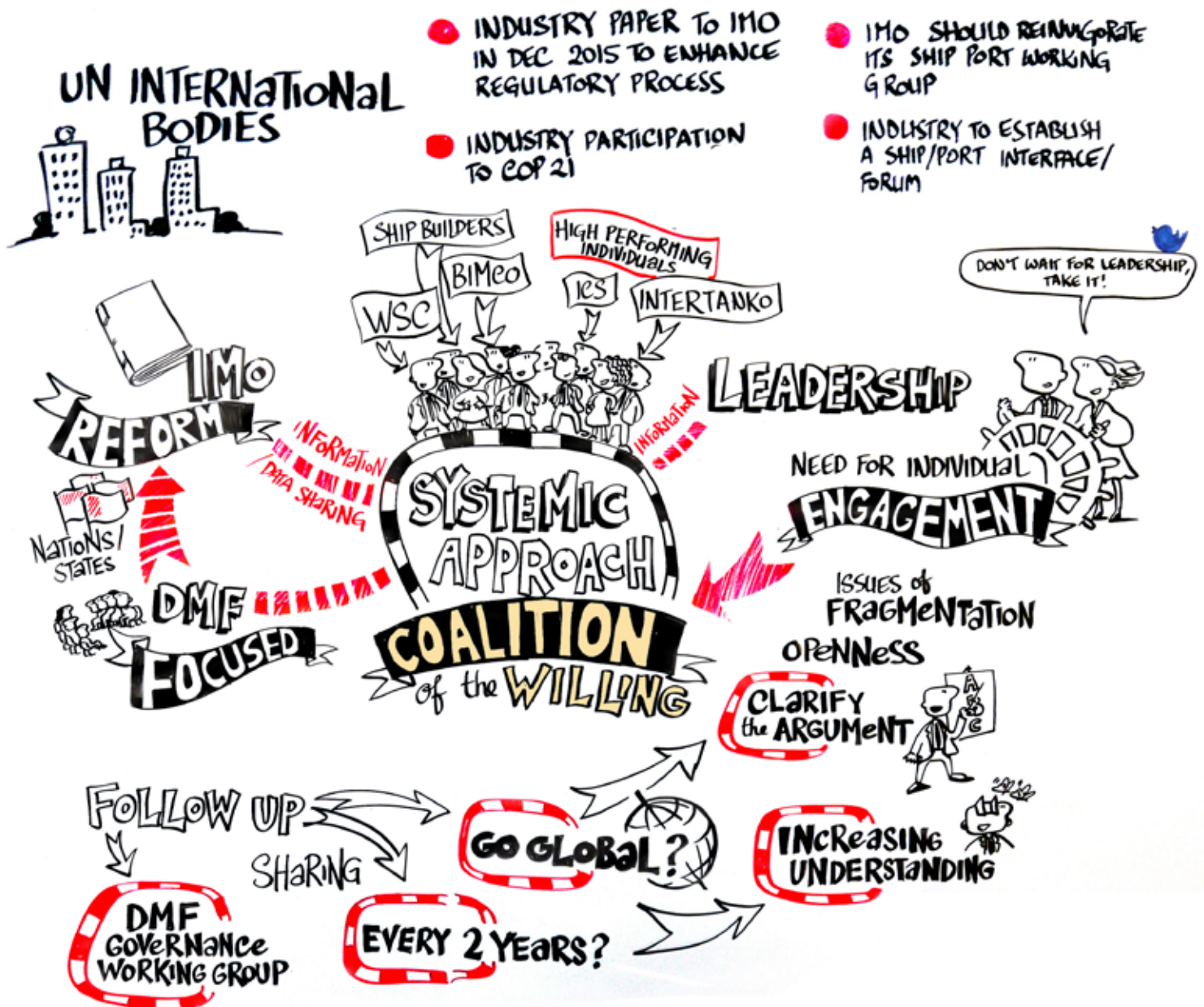
Several groups proposed that discussions should be initiated by leading companies and that together they could define objectives, create an action plan, and deliver results for the maritime industry as a whole.

It was also pointed out that some ideas would involve working with customers, governments, and representatives of civil society in order to set the best course for action.

Governance

How can the maritime industry create a more collaborative environment between its many public and private stakeholders and be proactive in shaping regulation?

- What will it take to overcome fragmentation and create a common vision for the industry?
- How do we create a predictable and sustainable framework? What trade-offs need to be made to do this?
- How do we connect the national, regional and global rules in a coherent way?
- How do we ensure effective and unified enforcement?
- What are the principles we use to establish an international standard-setting body?



“What we have today doesn’t bring us where we want to be.”

Participant in the Danish Maritime Forum.



A level global playing field is a precondition for the maritime industry's success and the maritime world is blessed to have a truly global regulatory body in the IMO. This view was shared across all working groups. However, the groups also agreed that decision-making in the IMO is too slow and inefficient, and that the slow pace of ratification of international conventions and rules is a real problem for the industry, sometimes making new rules obsolete even before they are implemented. Moreover, for many in the industry, the IMO is a “black box”: they have little understanding of the complex formal and informal processes that go into formulating global rules within the IMO or what critical factors affect regulatory output.

Fragmentation and a lack of a common vision were the most commonly cited barriers to the creation of a sustainable governance framework for the industry. While there have been some good examples of industry leadership in the development of policy solutions, divergent and competing interests can make it difficult to engage effectively on common challenges. Some groups also pointed to a lack of transparency and sharing of critical information as a barrier to change. Others highlighted the need for the uniform enforcement of agreed-upon rules. Several groups discussed the role of the shift in global power from nation states to mega cities, viewing this as both an opportunity and a challenge. While cities might prove nimbler in developing and implementing new policies, this might result in a more complex and fragmented policy landscape for the industry to navigate. Another group debated the role of cargo owners in driving change.

Ideas to take forward

- Form an industry leadership alliance - a coalition of the willing - to advance collaboration, transparency and high standards across the industry and

proactively engage with policy makers on the regulatory landscape of the future. Speaking with one voice, its objective would be to deliver proposals that make broad, strategic sense. The group would consist of representatives from across the maritime value chain including sector-specific organizations including the International Chamber of Shipping, INTERTANKO, BIMCO, INTERCARGO, and the World Shipping Council.

- Improve data and information sharing across the value chain to increase transparency related to performance. This would serve to guide policymakers and improve environmental performance and awareness, while increasing efficiency and profitability and reducing costs.
- Use trade-wide, global forums to help spread knowledge, exchange ideas and advance issues.

Way forward

As discussions built on ideas discussed during the 2014 Forum, several groups were eager to take concrete action to ensure that solutions being proposed were turned into concrete, implementable actions. Several groups suggested establishing a governance working group to be set up under the auspices of the Forum to work up an action plan and next steps.

Other concrete proposals included presenting an industry paper to the IMO on smart regulation developed by the International Chamber of Shipping, industry participation to the UNFCCC's COP21 and the reinvigoration of IMO's Ship/Port working group with an appropriate industry interface.

Several groups also proposed the development of a common, acceptable framework for information sharing in the industry.



“Over recent decades we have seen the power of international trade as it has improved global living standards and lifted millions out of poverty. Now the world’s maritime industry is at the forefront of an era of growing world trade and rising prosperity.”

**Robert Goodwill,
Minister of Shipping, United Kingdom**





DANISH
MARITIME
FORUM



DANISH
MARITIME
FORUM

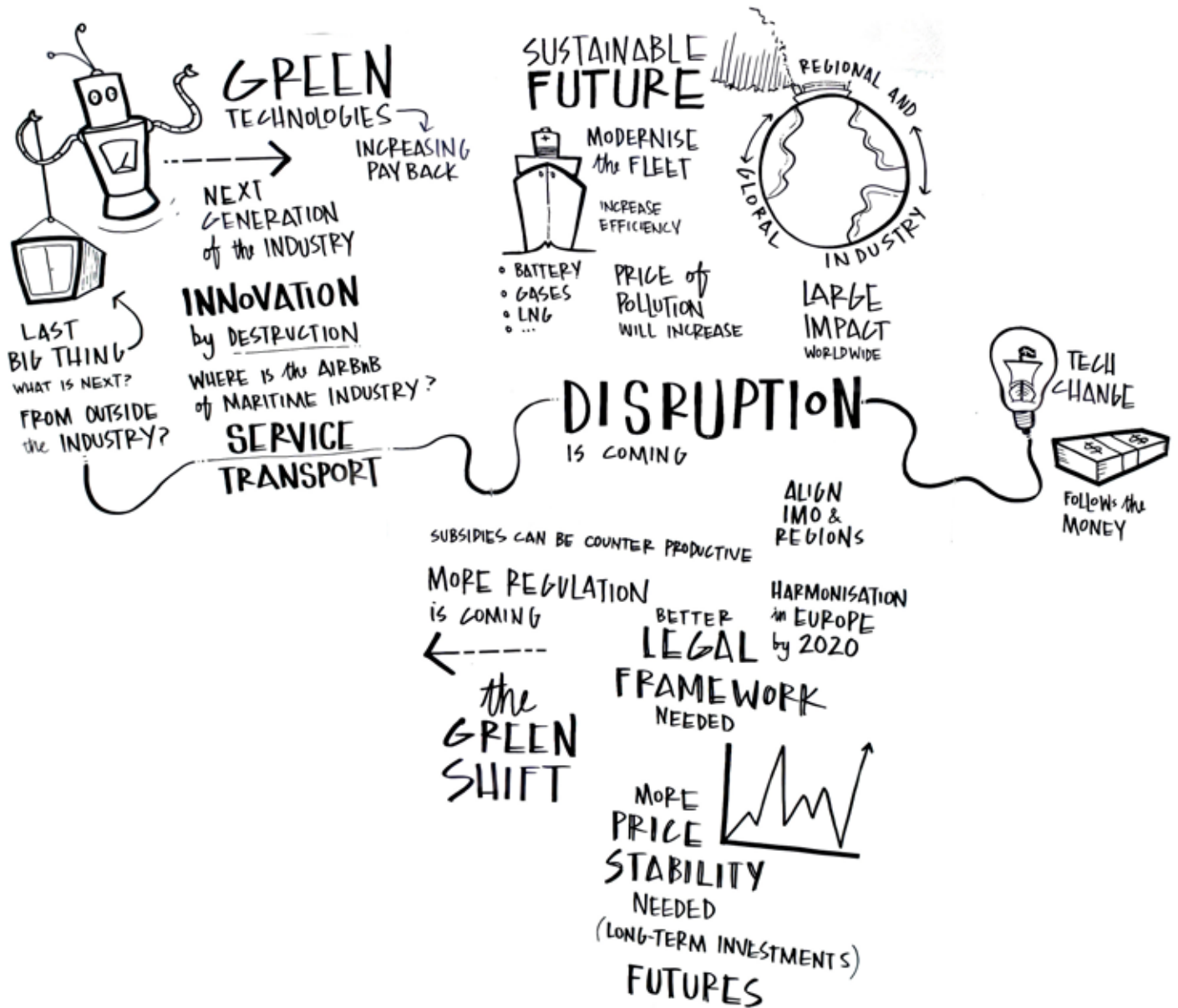
Global Input

Through seven different sessions, the participants gained insight into where the world is heading, and what the implications might be for the global maritime industry.



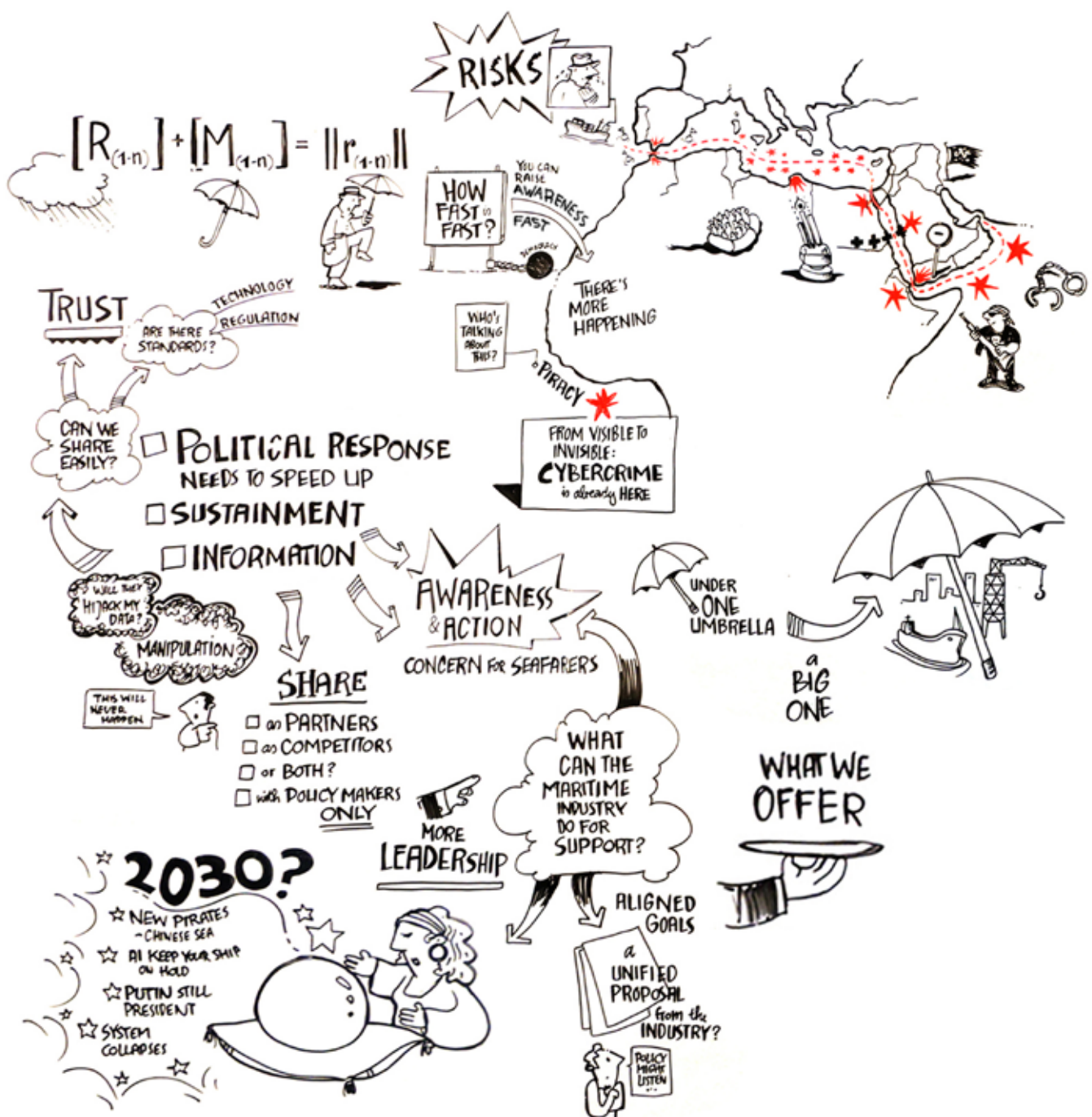
Dilek Ayhan
State Secretary, Ministry of Trade, Industry and Fisheries, Norway

Accelerating Technology Deployment



Sir James Burnell-Nugent
Senior Fellow, Oceans Beyond Piracy, United Kingdom

New Directions in Maritime Crime



Paul Holthus

President and Chief Executive Officer, World Ocean Council, USA

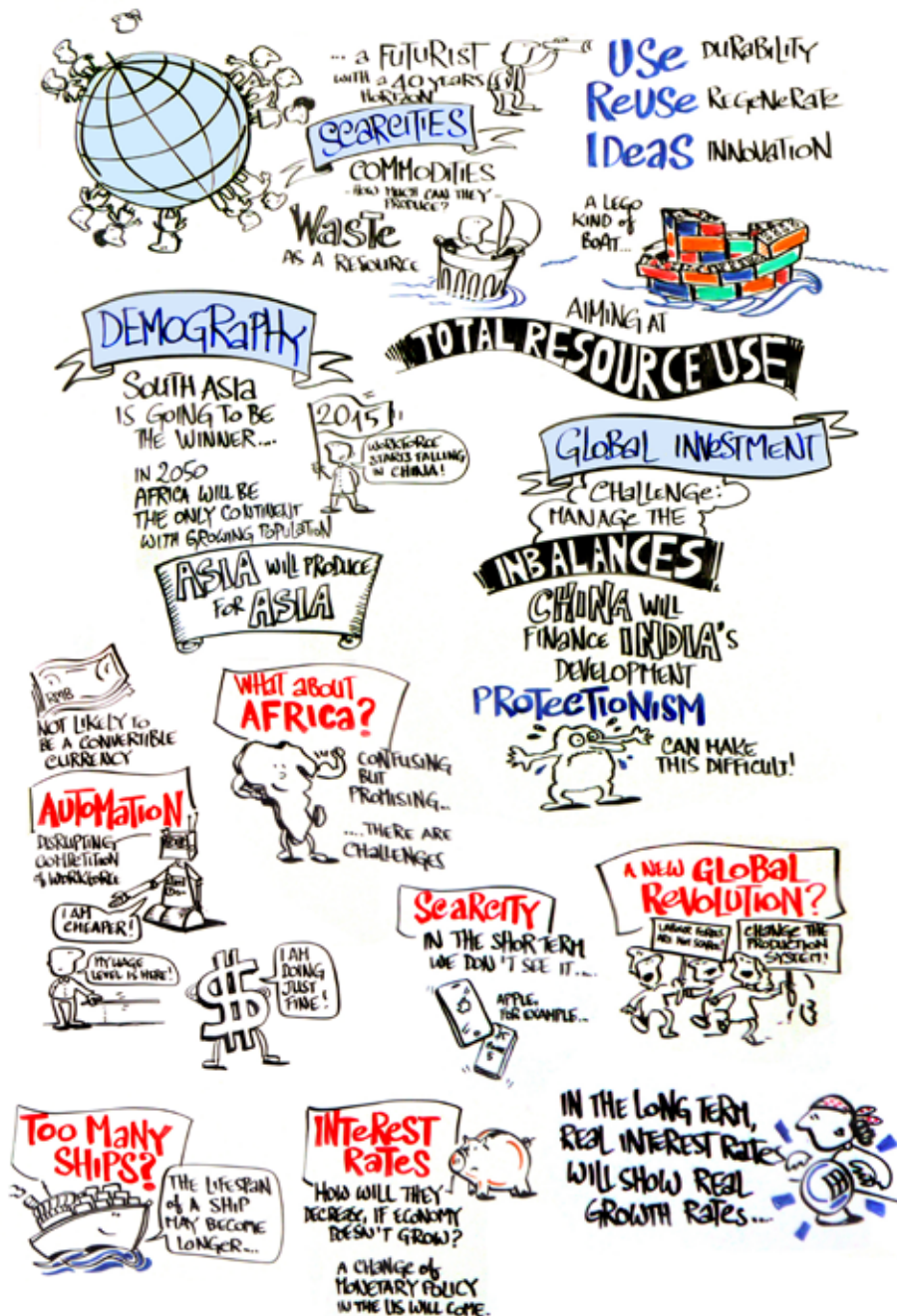
The Future of Ocean Governance



Jørgen Ørstrøm Møller

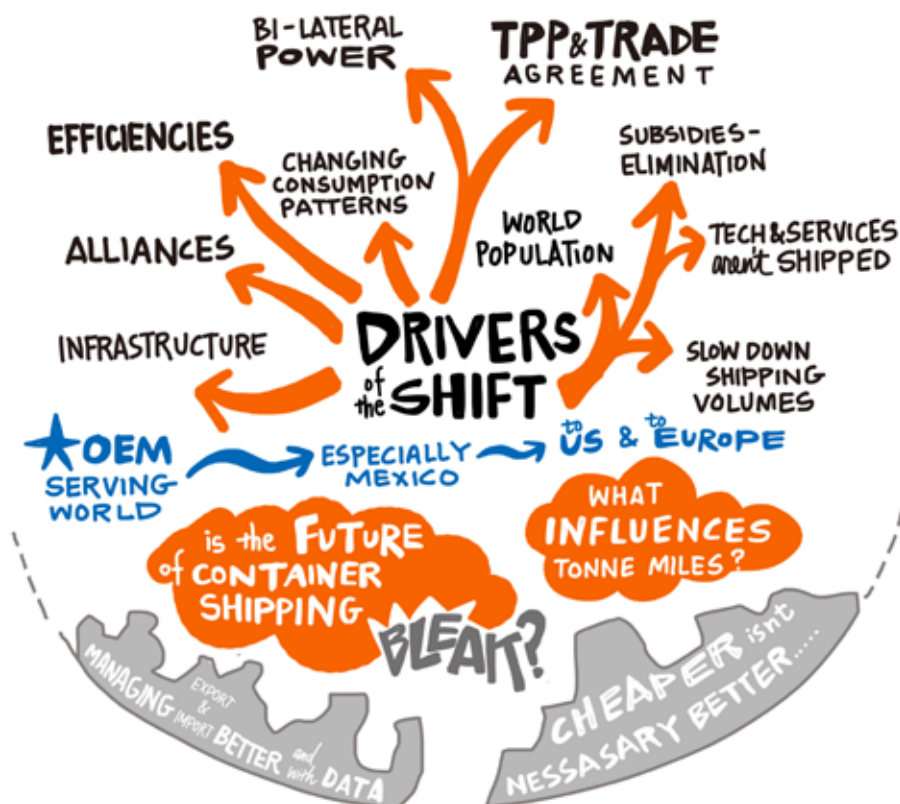
Visiting Senior Research Fellow, Institute of Southeast Asian Studies (ISEAS), Singapore

Scarcities, Demography and Global Investments



Albert C. Stein
Managing Director, Alix Partners, United Kingdom

Shifts in Global Supply Chains



	TANKER WET	DRY	BOX CONTAINERS
SOURCE	FRACKING	<ul style="list-style-type: none"> CHINA SLOW DOWN URBANISATION SHIP SIZE POPULATION GROWTH 	<ul style="list-style-type: none"> MULTI-REGIONAL CUBA → N.A. CHINA → ASIA FRAUD/SECURITY CYBER JOB CREATION ALTERNATIVE TRANSPORT
MAKE	ALTERNATIVE ENERGY	STEEL PRODUCTION	3D PRINTING for Small items
MOVE	<ul style="list-style-type: none"> PRODUCT TANKERS ROUTING (SHIPPING) END DESTINATION SECURITY & SANCTIONS REGULATION BETTER DATA MANAGEMENT CHANGES IN OIL PRICE DISTANCES will SHORTEN/LENGTHEN TONNE MILES 		<ul style="list-style-type: none"> NEW PANAMA CANAL EFFICIENT USE of SHIPS SIZE of SHIPS INCREASE WAGES in DEVELOPING COUNTRIES SUSTAINABILITY TRANS-SHIPPING SHIFT to CUBA!

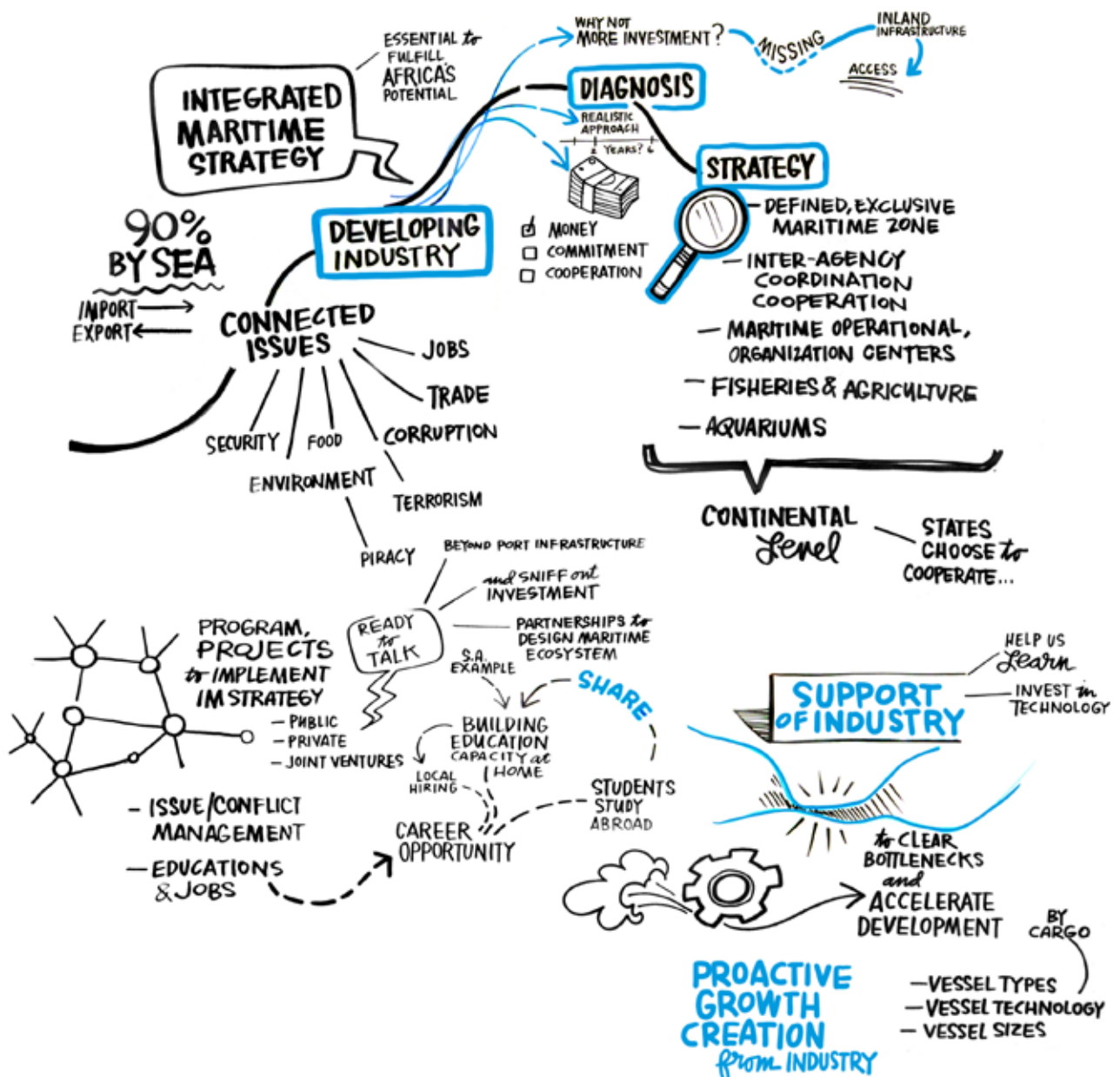
Rongrong Huo,
Head of China and RMB Business Development, HSBC, United Kingdom

The New Silk Road



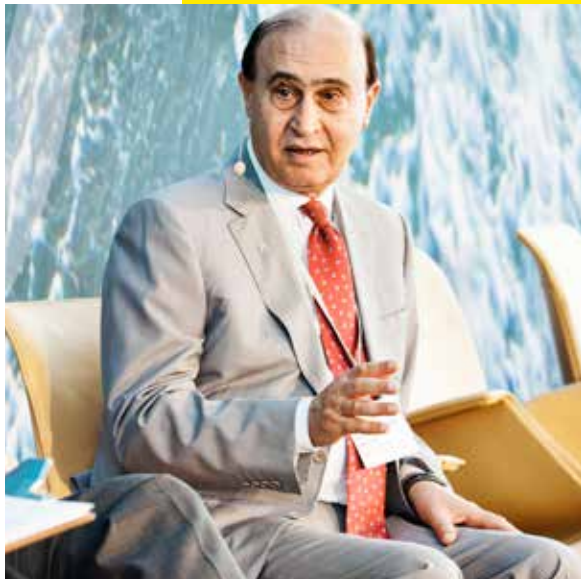
Sindisiwe Lydia Chikunga
Deputy Minister of Transport, South Africa

Maritime Growth in Africa



A Shortcut to Global Growth

A highlight of the Forum was the plenary session, in which we heard about two of the most important advances in maritime history, in a first-ever public conversation between Chairman of the Suez Canal Authority, Admiral Mohab Mameesh and Administrator of the Panama Canal Authority, Jorge Quijano.



Suez Canal: Admiral Mohab Mameesh

Before the canal was expanded recently its capacity was limited. Delays were experienced and if there were mishaps in the canal, for instance grounding of a ship, then all ships would be delayed since there was one lane for both directions.

The expansion not only made the transits much faster, but also it was widened to accommodate bigger ships. Most importantly, the canal project was slated to take three years, but it was completed in one. This was an incredible achievement given all the issues and strife in Egypt during that time.

The Egyptian people funded the costs \$ 8.2 billion of the project, and there is a lot of interest in investing in the canal. We are currently adding infrastructure, like container terminals and logistics services and we will make sure that you will be very safe.



KEEPING the
CANALS READY
FOR the GROWING
MARITIME
INDUSTRY



• CONTI
EXPA
• LISTE
THE
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the MARITIME SU

Panama Canal: Jorge Quijano

We identified capacity and reliability issues in the Panama Canal in the late 90s. The usage projections and trade patterns changed, prior to 2008, which caused us to decide to build a new set of locks.

Right now the expansion is 95 percent complete, and expected to be finished by April 2016.

Panama sits in the center of Latin America, and is a natural hub for the region. Traffic and the demand for maritime services, like concessions, container terminal, logistic park, have helped the canal to have a great financial year. Now, 80 percent of ships stop at the ports on either side to deliver cargo to the countries of Latin America.

The future is turning out differently for us than we imagined: we diversified the market and now handle all industry segments. Now we are managing energy, which has propped up in the last few years. We have energy cargo going to Asia for the first time next week. And, the canal will continue to expand.



CONTINUE TO
AND
TURNING TO
CUSTOMERS
HUB!!
SUPER HIGHWAY!

Ministers' Roundtable

In the Ministers' Roundtable, political representatives from seven key maritime nations came together to discuss how to unleash the potential of the global maritime industry.

How can the industry contribute to increasing human wellbeing and reducing its environmental impact? What are the global and regional issues the global maritime

industry should be prepared to address? What should the role of political and regulatory bodies be in paving the way for success?

The session was moderated by Nik Gowing, Visiting Professor, Faculty of Social Science and Public Policy, Kings College London and former presenter, BBC World News.

The representatives were:

Mr. Troels Lund Poulsen, Minister of Business and Growth, Denmark

H.E. Ki-june Yoo, Minister of Oceans and Fisheries, Korea

Mr. Robert Goodwill, Minister of Shipping, United Kingdom

Hon. Joyce Bawah Mogtari, Deputy Minister for Transport, Ghana

Ms. Dilek Ayhan, State Secretary, Ministry of Trade, Industry and Fisheries, Norway

Ms. Lydia Sindisiwe Chikunga, Deputy Minister of Transport, South Africa

Mr. Binyah C. Kesselly, Commissioner and Chief Executive Officer, Liberian Maritime Authority, Liberia

EXCHAN
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Idea



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HOW CAN the MAR
CONTRIBUTE to INCR
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ITS ENVIRONMENTA





Seafaring
Nation

- ▶ Training
- ▶ Courage
- ▶ Action

But...
Navigating in
a bubble...



HEROES
taking the
ACTION
to PROTECT the
NATION



CHANGE YOUR
VANTAGE POINT

CHANGE YOUR
VANTAGE POINT

REDUCE
UNCERTAINTY

SOFTWARE
EATS the
WORLD



BY
WORKING
TOGETHER

YOUR
ROLE is
CRUCIAL!

YOU are
CRUCIAL

UNCERTAINTY

CHOICES



▶ **NAVIGATING**

“You’re part of an industry that brings goods, food, and fuel to all parts of the world, and together you play a crucial role in making the world go round. That is something to be proud of, but also something that requires responsibility.”

HRH Crown Prince Frederik of Denmark



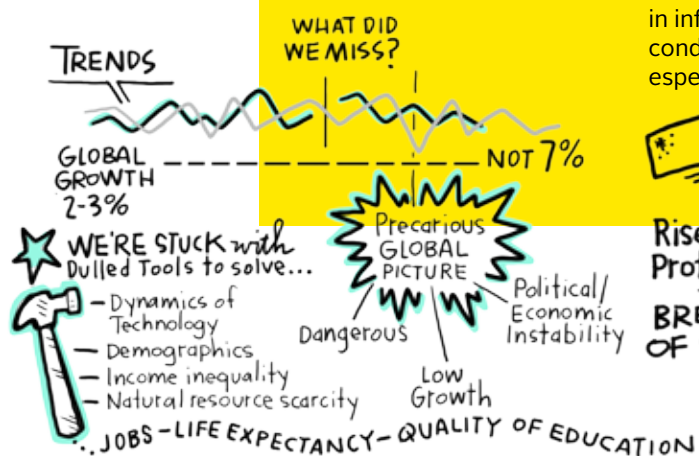
What if?

Dambisa Moyo, Economist and author, and Nik Gowing, Visiting Professor at the Faculty of Social Science and Public Policy, Kings College London and former presenter at BBC World, offered a grim assessment of today's world as a way to inject urgency in collaborative response by the industry.



Dambisa Moyo highlighted the economic challenges that the maritime industry is facing in the years to come. Referencing leading institutions such as the IMF and McKinsey, Dambisa Moyo argued that we may never again see the growth rates that we experienced prior to 2007. In the next 50 years global growth is estimated to average around two to three percent, half the growth rate of the past 50 years. However, to put a dent in global poverty, the world economy needs to grow by at least seven percent a year. This gap is likely to cause increased economic and political instability around the world.

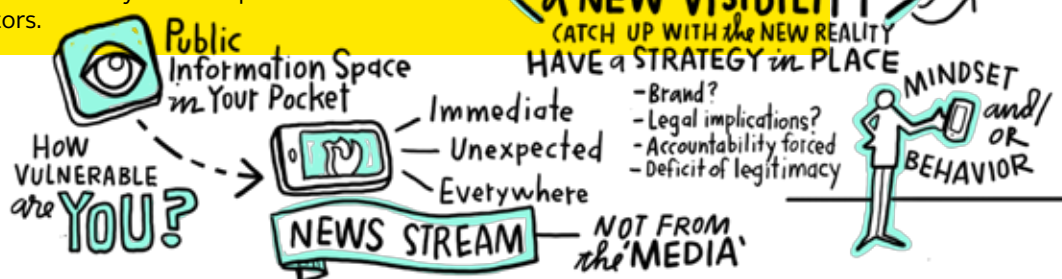
Dambisa Moyo pointed to four drivers behind this bleak outlook for the world economy: the dynamics of technology, shifting demographics, income inequality and natural resource scarcity. Compounding the impact of these four drivers is the fact that the tools that we have depended on in the past to address economic crises – fiscal and monetary policy – have become largely blunt tools. While they may help in the short term, we are not able to deal with the structural problems that drag down our ability to improve quality of life and human prosperity such as underinvestment in infrastructure, education etc. These conditions require new kinds of responses, especially by global industries.



Nik Gowing challenged the leaders in the room to pay attention to the new public information space caused by the immediacy of anyone anywhere being able to record and upload videos from their mobile devices in a matter of moments. This new level of transparency is “irreversible, inexorable and inevitable” and according to Nik Gowing it creates a new vulnerability for power, politics and systems.

We now have to assume that whenever anything is happening someone somewhere is going to record it. This will have implications for the legal side and our brand.

He gave examples where the new public information space has impacted the maritime industry. The sinking of the Costa Concordia and the explosion in Tianjin demonstrated how people even in a time of crisis use their mobile phones to monitor everything as it happens and broadcast it. Given the nature of our industry, this is a challenge we too will face. We may think we have 24 hours to handle a situation but Nik Gowing believes we have closer to 24 minutes to respond. Otherwise the public will be inundated with information from sources outside our control and will likely already have made up its mind. Nik Gowing concluded that leaders must embrace and enter this new public information space in order not to be defeated in the eyes of the public and our investors.



Fireside Chats

These sessions were inspired by a series of radio addresses given by U.S. President Franklin D. Roosevelt in the 30s and 40s where he shared his hopes and plans for the country. At the Danish Maritime Forum the Fireside Chats provide an informal setting for participants to share their experiences and reflect upon still open questions under the Chatham House Rule.

What keeps you up at night

What are the big questions and uncertainties that keep you awake at night?

*Binyah C. Kesselly,
Commissioner and Chief Executive Officer,
Liberian Maritime Authority, Liberia*

*Arsenio A. Dominguez,
Ambassador and Permanent
Representative of Panama to the IMO,
Panama Maritime Authority and Chairman
of MEPC, United Kingdom*

*Christian Breinholt,
Deputy Director-General, Danish Maritime
Authority and Chairman of MSC, Denmark*

Where Boards Fall Short

Most boards aren't delivering on their core mission of providing strong oversight and strategic support for management's efforts to create long-term value. What is the key to building a board that delivers?

*Lars Bo Jørgensen,
Partner, Egon Zehnder International,
Denmark*

When Iran Rejoins the Global Economy

Iran is set to become the largest country to rejoin the global marketplace since the breakup of the Soviet Union. By some estimates, this could result in 2 to 5 percent additional GDP growth for Iran's economy within a year. What will it take to realize this potential? What are the opportunities for the maritime industry as well as other important sectors?

*Dr Mohammad Saeidi,
Chairman, Islamic Republic of Iran Shipping
Lines, Iran*

What to Expect from the IMO

What will it take for the IMO to work most effectively? Three committee chairmen weigh in.

*Jeffrey G. Lantz,
Director, Commercial Regulations and
Standards, US Coast Guard and Chairman
of IMO Council, USA*

What keeps you up at night

Where Boards Fall Short



When Iran Rejoins the Global Economy

What to Expect from the IMO









Closing Plenary: Unleashing the Potential of the Global Maritime Industry

The Danish Maritime Forum was concluded with a presentation of the working group outcomes. Furthermore, Randy Chen, Vice Chairman and President of Wan Hai Lines; Claus Hemmingsen, Chief Executive Officer of Maersk Drilling and Chairman Danish Shipowners' Association; and Michael Parker, Managing Director and Global Head of Shipping at Citi shared their thoughts on the most promising solutions and actions as well as possible next steps.

Claus Hemmingsen

"We created this Forum to bring together people from across our entire industry and share perspectives that would enable the entire industry to benefit. Many ideas and actions have been generated and change will happen only when each of us take responsibility to act."

Michael Parker

"After more than 30 years as a banker to the industry the Forum offers the opportunity to continue learning about the industry, which shows how much more we still have to learn about each other to make the right decisions for the industry's future. There is no shortage of money for the industry but there is a shortage of capital and we bankers to the industry must be advocates for you. That is one reason why the image of the industry matters; when the industry is seen to be doing the right things and moves ahead on important policies, the task of promoting the industry is easier for all of us."

Randy Chen

"I am not here to find a specific edge to beat my competitors on, but rather I am trying to identify the areas where we have to work together."

"This is an industry that requires incredible amounts of teamwork no matter what size or scale or shipping sector you are in because you can not rely on your own will to make things happen."





Snapshots from Danish Maritime Days 2015

Throughout the week of 5-9 October 2015 the Danish Maritime Days platform hosted more than 80 independent events.

Danish Maritime Days was structured thematically and participants had an opportunity to assemble a weekly program from among seven themes: Maritime Growth Areas of the Future, Leveraging New Technologies and Innovation, Workforce of the Future, Sustainable Growth, Maritime Regulation, Meeting the Transportation Infrastructure Needs of the Future and Maritime Security.

The events were all organised independently on the basis of an open invitation and with the goal of finding new solutions to the most important challenges facing the industry. Here are a few snapshots from the week.





Achieving Sustainable Ship Recycling and Effective Sulphur Compliance and Enforcement

Environmental regulation is among the primary drivers of maritime efficiency gains but also poses its share of challenges for the industry.

It was within this context that representatives from industry, authorities and other key stakeholders discussed environmental regulation and sustainable solutions for shipping in the areas of ship recycling and enforcement of sulphur requirements.

The full day event was organised by the Danish Shipowners' Association, The Danish Ecological Council, The Danish Environmental Protection Agency and The Danish Maritime Authority. Presentations were followed by working group discussions, which resulted in a number of key messages in terms of achieving sustainable ship recycling as well as effective sulphur compliance and enforcement.

Safety First

Green-Jakobsen hosted two workshops with the purpose of exchanging experiences and drawing inspiration from a number of safety maturity surveys and safety programmes and to discuss the ability of shipping companies to properly evaluate safety performance.

The following experiences were shared: Systems are in place to support safety, however the risk management process is an uneven process where staff and crewmembers are not aligned and aware of their roles and responsibilities.

There is generally a reactive safety performance focus and company standards are not strong enough to meet requirements from clients and others.

Top management is committed to safety, but often there is little participation from office middle management. Safety leadership at all levels in an

organisation needs much more focus as leaders are the real drivers directing and cultivating safety performance.

The evaluation of safety performance is generally poor and we need to improve our ability to discuss, assess and evaluate work processes. There is no alternative to accepting subjectivity in evaluations - all experience is subjective and we need to develop our employees' ability to comprehend their own safety performance.

To monitor and evaluate safety behaviours we need alternative indicators, e.g. Safety Conditions Indicators, allowing/forcing us to address 'at-work-place' perceptions, experiences, processes, etc.



Regional Maritime Security Challenges and Opportunities for Governments and Industry

The Danish Shipowners' Association, Oceans Beyond Piracy and Risk Intelligence brought together experts from the maritime sector, governments, international organizations, navies, NGOs and academia.

The objective was to discuss the challenges to maritime security in West Africa and Southeast Asia as well as to identify opportunities for governments and the maritime industry to cooperate to address these threats. A core goal of the conference was to encourage to a dialogue between the participants that would showcase their expertise. This was achieved through interactive sessions where the audience played a key role in identifying the challenges being faced and sharing their ideas to solve them.


The main conclusions were: Maritime security challenges such as piracy, trafficking of

human beings or drugs, armed conflict, or terrorism can only be solved through a multi-faceted cooperation between governments and industry. The successful international efforts to address Somalia-based piracy could offer lessons for other types of maritime security threats, or piracy in other regions of the world. Transnational crime is a law enforcement responsibility and it should be emphasized that national and international law enforcement cooperation and information-sharing should be promoted in order to address this type of threat in the long term.

In West Africa, there are opportunities to support regional initiatives to strengthen maritime law enforcement capabilities, and to build a cohesive legal framework to prosecute criminals by integrating international and regional strategies and contributions. Ultimately it is the responsibility of nations in the region to demonstrate a commitment to making their waters safe for maritime trade. Lastly, more research into the potential of developing Africa's Blue Economy could serve as a

foundation to create jobs and encourage international investment in the region. In Southeast Asia, but also globally, there is a need to promote more consistent and shared piracy reporting categories in order to fully understand and establish the level of threat to regional and international shipping and highlighting the threat to seafarers.

Due to the transnational nature of the crimes in SE Asia, a stronger commitment from regional States is required to ensure full reporting of maritime crimes, to improve cooperation on information sharing and post incident investigations, and to ensure that suspects are prosecuted and incarcerated, as appropriate.



Displaying the Danish Maritime Cluster

The Danish Maritime Fair organised by Maritime Danmark reflected the entire Danish maritime cluster, including authorities, classification societies, organisations and NGOs as well as service providers and equipment suppliers. The Fair contained 218 exhibiting companies and welcomed 4,550 visitors. In addition to the exhibition activities the Danish Maritime Fair hosted several events like The Danish Shipping & Ship Management Conferences, The Danish Maritime Technology Conference, The Future Maritime Craftsman, The Danish Ship of The Year 2015, receptions, a networking dinner and much more.

The Role of Container Shipping and Logistics in Developing Countries

Recent studies show that high transport and logistic costs and a lack of advanced logistic services are some of the main barriers to growth and prosperity in developing countries. Inefficient supply chains seriously hamper

developing country firms' ability to compete and become integrated into global value chains. Shipping and logistic multinationals play a growing role for developing countries. This issue was addressed from a business and academic perspective at the seminar organised by CBS Maritime, Centre for Business and Development Studies and Maersk.

The seminar highlighted the following findings: New insights demonstrate the extraordinary importance of shipping and logistics in economic development. Recent research shows that supply chain bottlenecks are some of the main barriers to prosperity and growth in developing countries.

Continuous concentration in the industry means that shipping and logistics multinationals play an increasingly larger role in global container trade and therefore also for developing countries' connectivity to foreign markets.

The maritime industry needs more practice-driven

and academic research that focus specifically on the role of shipping and logistic multinationals in developing countries, and on how these (in collaboration with public resources) can contribute to trade and economic development in those countries.

Positive Experiences with Novel Technologies

At the Lloyd's Register Maritime Forum key speakers shared their experiences with new technologies as well as looked into the future of shipping and technology trends out to 2030. The seminar offered a mix of presentations, panel debates and networking. Discussions primarily focused on the experience gained from some of Scandinavia's 'first movers' who have implemented emerging technologies in the recent years including different alternative fuel options, hybrid propulsion and the use of wind power.

A few years ago the discussions focussed

on what ship owners were planning to do and it was all very hypothetical, whereas today discussions have taken a step further and focus on the operational experience with the new technologies. New technologies also call for use of a risk-based approach.

Key messages from the Forum were: No "one technology fits all". Different operational patterns call for very different solutions to reduce environmental impact. Ship owners have been acting, have implemented new technologies and have gained operational experience. There has been a notable shift in the past 3 to 5 years from "what could be done"

to "what has actually been implemented". Some ship owners have had such success with new technologies that they are ready for the next step.

Collaboration across the maritime industry - sharing ideas and experience between

stakeholders - is necessary to meet the challenges of the future.

Requirements for the Future Maritime CEO

The traditionally family controlled industry is confronted by new owners,



often private equity funds, who have entirely different demands in terms of returns on investment. This formed the basis for a conversation facilitated by ShippingWatch about how new leadership requirements are changing the profile of the future maritime CEO at an ever increasing pace.

The next generation of shipping executives may take these reflections into account:

The importance of having a strong financial understanding has increased and shipping executives need to know how to engage with capital markets.

Private equity funds are looking for candidates who can double the size of the company within five years and they look outside traditional shipping circles. However, shipping is a team effort and it is still essential to understand the industry and its market cycles just as having an international outlook, integrity and personal leadership is important to the future maritime CEO.

Previously,

Scandinavian companies were able to attract the best talents and candidates had a great playing field because the competition internationally was less hard. Today the big private equity funds are beginning to enter the industry and they are smart guys.

Sharing Knowledge about State-Of-The-Art Maritime Solutions and Technologies

Danish Maritime Technology Conference 2015 gathered the technological side of the maritime industry for a two-day conference to discuss core challenges for maritime technologies, solutions and

products. During the conference participants engaged in in-depth sessions under the topics of Energy Efficiency and Emission Control, Maritime Growth Areas of the Future and Servitization and Optimization. The sessions and the technical presentations covered many cutting edge technologies,

many which would allow significant efficiency gains. The central finding of the conference was the consensus that future growth would hinge upon the integration of technologies, not least digitalisation, and

better cooperation and trust between stakeholders. The following views were presented: Speakers touched on the regulatory challenges that innovation must solve, but which may also limit possibilities if regulation is not done well.

More supported the message that the shipping industry's business model is obsolete. Today's shipping companies are not particularly deep in terms of new technology and the key to increased energy efficiency is technological development.

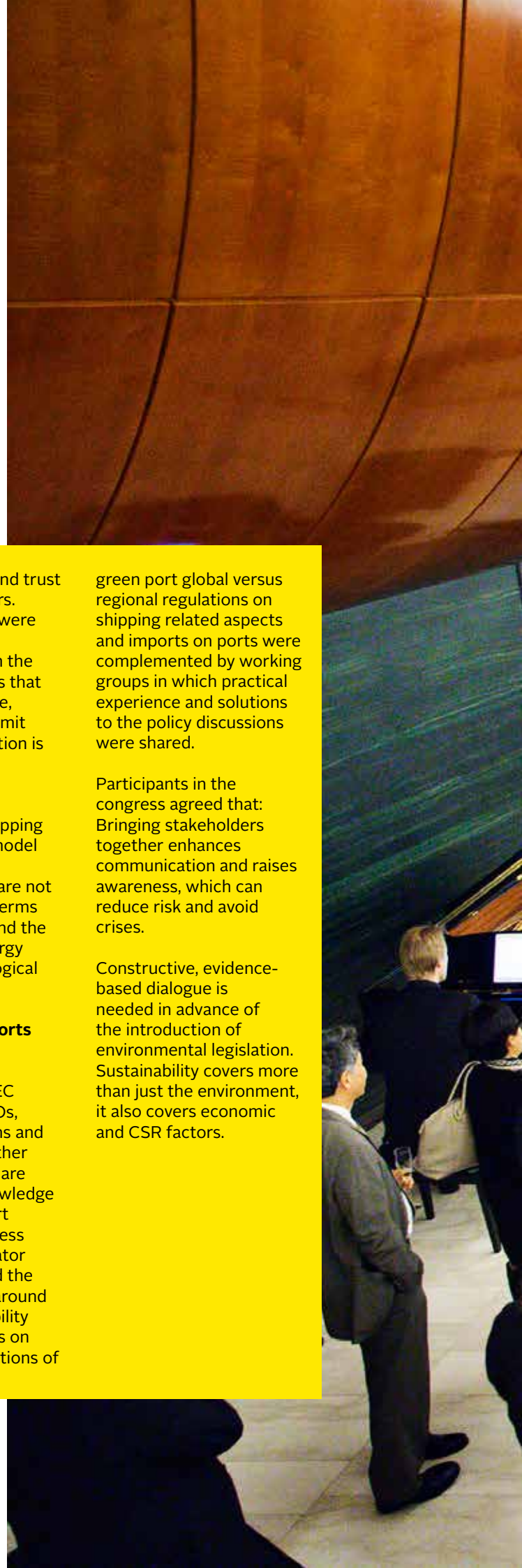
Developing Green Ports

Port authorities, terminal operators, EC representatives, NGOs, industry organisations and suppliers came together to network and to share experiences and knowledge at the 10th GreenPort Congress. The congress was hosted by Mercator Media and addressed the treatment revolved around of all three sustainability pillars. Policy debates on stakeholder's perceptions of

green port global versus regional regulations on shipping related aspects and imports on ports were complemented by working groups in which practical experience and solutions to the policy discussions were shared.

Participants in the congress agreed that: Bringing stakeholders together enhances communication and raises awareness, which can reduce risk and avoid crises.

Constructive, evidence-based dialogue is needed in advance of the introduction of environmental legislation. Sustainability covers more than just the environment, it also covers economic and CSR factors.





Exploring Challenges Faced by Port Managers and Regulators

The PortExecutive Seminar provided port and port-related professionals with in-depth authoritative analysis of the challenges and opportunities facing the environment. With input from decision-makers, industry representatives, PortEconomics and CBS Maritime researchers, this interactive seminar focused on: port governance, public-private partnerships, stakeholder management, port performance and port supply chains, cruise ports and green ports.

The seminar brought state-of-art academic research on ports to life, and used them to frame discussions among representatives of senior management who did not always agree on a shared path forward. The seminar challenged practitioners with thought-provoking ideas. One claim made was that ports around the world suffer from a dated mindset and lack of commercial thinking. Is it time, for example, to

do away with thinking in terms port "authority" and start thinking in terms of port development on commercial, market-based ground?

An industry session, with the participation of the Danish Shipowners' Association and Copenhagen Malmö Port, concluded the discussions of the seminar, testing the practical application of several recurring concepts discussed throughout the two-day session.

Value Creation between Academia, Industry and Public Sector

In recent years, many maritime research and education activities have been initiated in Denmark.

ATV has taken part in initiating many of these activities with funding from The Danish Maritime Fund. This session took stock of developments so far and discussed new innovative needs, opportunities and possible actions. Organized by ATV, DTU, SDU, AU, AAU, FORCE Technology, the Danish Maritime Authority and MAN Diesel & Turbo, the

seminar was attended by participants from industry, research institutions and the public sector.

The seminar concluded the following: Good collaboration has been established between the industry and research institutions over the past five years.

Lean is a concept that complicates the innovation process. The clusters that facilitate collaboration between industry, public sector and researchers must recognize this reality and reflect it in their innovation strategies.

Innovation can happen in many, interdisciplinary areas, but innovation and technological development out to 2030 must be mapped if it is to be realized.



Danish Maritime Days

A Global Platform

Danish Maritime Days is a major event for the global maritime industry. It brings together a broad spectrum of independent stakeholders from all over the world to find new solutions to the most important challenges facing the industry today and in the future.

With a wide variety of events – including conferences, briefings, exhibitions, symposia, company visits, receptions and dinners – Danish Maritime Days is an opportunity to engage with your peers from around the world, make new connections, be inspired and forge new partnerships.

Collaboration Across Sectors

Danish Maritime Days is a platform for collaboration across the entire maritime industry. Participants, including ship owners, bankers and other investors, shipyards, suppliers, brokers, lawyers, ship management, insurance, ports and various service providers, gather to discuss current issues with regulators and other important stakeholders. Dynamic, interactive and informal dialogues present an opportunity for opinion leaders to advance innovative solutions to the strategic challenges facing the industry.

Join Us

Danish Maritime Days is an open platform. All stakeholders from around the world are invited to plan events as part of Danish Maritime Days and thus take advantage of the synergies that arise from participation in a larger platform of independent, international maritime events. For more information on how to join the open platform, please visit www.danishmaritimedays.com.



The Danish Maritime Forum

Unleashing the Potential of the Global Maritime Industry

The Danish Maritime Forum is an invitation-only summit that brings together key leaders in the global maritime industry with policymakers, experts and other influential decision-makers and opinion shapers. The objective with this high-level meeting is to inspire participants to work together with a clear goal in mind: unleash the full potential of the global maritime industry to increase long term economic development and human wellbeing.

A collaborative platform

The Danish Maritime Forum aims to facilitate a collaborative process that challenges traditional silos within the global maritime industry. With senior representation from governments, business, NGOs, customers and other important stakeholders, the Danish Maritime Forum will focus on what steps might be taken to strengthen cooperation between all maritime stakeholders.

The Danish Maritime Forum provides a unique, creative workspace where participants can discuss strategic challenges and learn from each other. Participants will work together to identify key challenges and draft solutions including new business opportunities, policy recommendations and collaborative approaches to address common challenges. The aim is not just to listen and network, but to take on big challenges and point to their solutions.

Issues on the Agenda

Discussions focus on how to enhance future profitability of the industry while strengthening the role and positive impact of the industry on global growth and development. Themes for the Danish Maritime Forum are developed in close collaboration with industry and other key stakeholders to ensure the most enriching discussions and outcomes.



Future Maritime Leaders

Shaping the Future of the Global Maritime Industry

The future of the global maritime industry is a vital part of the DNA of the Danish Maritime Forum. Considering the important role the next generation of global leaders will play in shaping that future, the Forum has sought to ensure their voices are part of these discussions. This is why a select number of Future Maritime Leaders were invited to the Danish Maritime Forum in 2015.

A Voice of the Future

These Future Maritime Leaders represented a voice of the future in discussions addressing some of the major challenges facing the global maritime industry. During the Forum, the Future Maritime Leaders participated in the full range of discussions and were charged with identifying key issues, strategic opportunities and possible solutions they believe need to be addressed to ensure the continued long-term competitiveness of the industry.

Furthermore, the Future Maritime Leaders presented their own ideas to the organisers as to how they can continue to secure the future participation of key leaders from the next generation. Their engagement and active participation in a conversation about the future direction of the industry is vital, as is guaranteeing their development and ensuring they have the proper tools at their disposal to guide the industry confidently into the future.

A c k n o w l e d g e m e n t s

Danish Maritime Days

Danish Maritime Days is a not-for-profit public-private partnership between Danish Maritime, the Danish Maritime Authority and the Danish Shipowners' Association. Danish Maritime Days is supported by the A.P. Møller Relief Foundation, the Danish Maritime Fund, D/S Orients Fond // D/S NORDEN, the Hempel Foundation, the Lauritzen Foundation, the Ministry of Business and Growth and the Torm Foundation.

The Danish Maritime Days Welcome reception was kindly hosted by Ericsson.

The Danish Maritime Forum Gala Dinner was kindly hosted by the Maersk Group.

Danish Maritime Days provides an open platform for stakeholders in the global maritime industry, all of whom are invited to plan relevant events as part of Danish Maritime Days.

The Danish Maritime Forum is organised by the Danish Maritime Days Secretariat.

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Our partners

Danish Maritime Days and the Danish Maritime Forum were prepared in close collaboration with our partners.

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CO2-NEUTRALISERET TRYKSAG FRA ROSENDAHL



Learn more
in the Danish
Maritime Forum
2015 video.

