Visions of the Future: what can be achieved with a Baltic Sea Strategy?

Documentation package

Included is the following:

- Overview programme
- Seminar flyer
- Presentation by Dr. Christian Ketels
- Presentation by Alf Vanags
- Presentation by Ulf Johansson
- Contact information for participants

For additional information, please contact Dr. Mikael Olsson, Sida Baltic Sea Unit, Box 1271, SE-621 23 Visby, Sweden. E-mail: mikael.olsson@sida.se or mikeswe66@gmail.com. Phone: +46(0)732-572511
The future Baltic Sea Region
Possible paths of development in the light of the emerging EU-strategy for the region

Overview programme, 7-8 July, 2008

On 7-8 July, 2008, the Baltic Sea Unit (Östersjöenheten) of the Swedish International Development Cooperation Agency (Sida) and Baltic Development Forum, in cooperation with the Centre for Baltic and East European Studies (CBEES), Södertörn University College, will arrange an international seminar/workshop with the aim to present and discuss visions of the future of the Baltic Sea Region as well as the challenges that need to be overcome to reach the goal of a well integrated and prosperous region.

The programme brings together key politicians, civil servants, practitioners and high-level academic expertise in the areas of discussion.

A total of three seminars and three workshops are arranged during the two days. All events take place right in the centre of medieval Visby on the premises of the Baltic Sea Unit (Östersjöenheten) (Donners Plats 1).

Background and aims
As its point of departure the meeting takes the Baltic Sea Strategy under preparation by the European Commission, after an initiative by the Swedish government. The strategy is to be adopted and launched in 2009 and constitutes one of the prioritised areas of the Swedish presidency.

The meeting will focus on the parts of the Baltic Sea Strategy that aim to deepen integration and increase the global competitiveness of the region.
At the centre of discussion will be what is needed to:

- Enhance factor mobility in the Baltic Sea region, especially when it comes to human capital.
- Strengthen, rationalise and make more transparent governance and coordination of joint activities and initiatives in the region. Of particular importance is deemed to strengthen cooperation between different organisations and also to include the force of the business community with regard to realising the visions of the strategy.
- Solve problems related to infrastructure in general and, more specifically, find solutions to cater for the increasing transport needs in the Baltic Sea.

Format of the meeting: merging competencies and knowledge

The aim of the meeting is not ‘merely’ to present, make public and discuss these important aspects of the Baltic Sea Strategy – aspects that in and by themselves may have a profound effect on the future of the Baltic Sea Region – but also to help forge lasting links between actors from different backgrounds and thus with different types of competencies and knowledge. It is our strong belief that this type of ‘merged knowledge’ may be of utmost importance both as input to the formulation and finalisation of a Baltic Sea Strategy but also, and equally important, to the successful implementation of the strategy.

In order to achieve this merger of competencies the programme runs for two days, where the first day (Monday 7 July, 2008) is mainly in the format of plenary sessions, whereas participants during the second day (Tuesday 8 July, 2008) are invited to a series of three workshops for more focused presentations and/or discussions. Each of the workshops is led by a prominent expert/researcher. Workshop results will also be documented and edited in three reports.

The programme concludes with a joint plenary session where the results from the workshops are presented and discussed.

Organising committee

Dr. Mikael Olsson (Project Leader)
Dr. Olsson is working as an analyst with the Sida Baltic Sea Unit and has been working with issues relating to the economic and societal transformations of the former eastern bloc countries for close to 20 years.
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+46-(0)732-572511 (cell phone)

Dr. Margrethe Søvik (Project Coordinator)
Dr. Søvik is currently working at Södertörn University College and is responsible for practical issues and coordination of the workshops.
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Adam Kanne
Adam Kanne is Deputy Director at the thinktank and networking organization Baltic Development Forum. Mr. Kanne has ten years of international policy development experience.
ak@bdforum.org
+45 602 185 76

Moderator

Jens Orback
Jens Orback is currently working as a freelance journalist. He became known to the general public through television as a host for the current affairs programme Striptease. Prior to that he had worked at the Ministry of Finance as an economist, and in 2004 he returned to the Government Offices as a Minister for Integration, Metropolitan and Gender Equality Issues.
The programme in brief…

For the full programme, updates, background material and ex post documentation, see http://www.sida.se/ostersjoenheten.

Monday 7 July

**Seminar I (10.15-11.45)**
Introducing the suggested Baltic Sea Strategy: why is it needed?
Among the speakers: Dr. Cecilia Malmström, Minister for EU Affairs, Sweden.

**Lunch (11.45-13.00)**

**Seminar II (13.00-14.30)**
Visions of the future: what can be achieved with a Baltic Sea Strategy?
Among the speakers: Dr. Christian Ketels, Harvard Business School.

**Coffee (14.30-15.00)**

**Seminar III & Panel Discussion (15.00-17.00)**
What is to be done? The role of societal actors in enacting a Baltic Sea Strategy.
Among the speakers: Prof. Stefan Fölster, Confederation of Swedish Enterprise.

**Reception (17.00)**
Garden of the Baltic Sea Unit.

Tuesday 8 July

**Workshop I (9.00-10.30)**
Why are plumbers more progressive than professors? A workshop on the role of human capital mobility as a driver for regional competitiveness.

**Coffee (10.30-11.00)**

**Workshop II (11.00-12.30)**
The times they are a-changin’… A workshop on the past, current and future role of multilateral, network- and interest organizations in the promotion of an integrated Baltic Sea Region.

**Lunch (12.30-14.00)**

**Workshop III (14.00-15.30)**
Exploiting the Baltic Sea… The role of transport in transforming the Baltic Sea from a Mare Dividum to a Mare Nostrum.

**Coffee (15.30-16.00)**

**Where to from here? (16.00-17.00)**

**Refreshments (17.00)**
Garden of the Baltic Sea Unit. Pictures by Dr. Jan Jörnmark.

The programme is open to all interested parties. No advance booking is necessary and all activities are free of charge.

Welcome!

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**Thomas Johansson**
Director
Sida Baltic Sea Unit

**Dr. Mikael Olsson**
Project Leader/Analyst
Sida Baltic Sea Unit

**Dr. Margrethe Søvik**
Project Coordinator
CBEES, Södertörn University College

**Adam Kanne**
Deputy Director
Baltic Development Forum
Visions of the Future: what can be achieved with a Baltic Sea Strategy?

Keynote by Dr. Christian Ketels, Harvard Business School.

This seminar focuses on the future of the Baltic Sea Region in the light of the Baltic Sea Strategy being devised by the European Commission. The seminar focuses on issues relating to the prospects for economic growth and integration as well as cultural challenges to such integration. Also, three alternative scenarios for the future of the region are presented and discussed.

Questions touched upon during the seminar include: What are the prospects for economic growth and development in the region, and what are the implications for the building of a region? What are the historical, cultural and man-made challenges to true integration? What will the region look like in 2048? The seminar concludes with a panel debate with invited commentators.

**Time & Place**
Monday 7 July, 13.00-14.30, Baltic Sea Unit (Östersjöenheten), Donners Plats 1.

**Organisers**
Sida Baltic Sea Unit (Sida Östersjöenheten), Visby and Baltic Development Forum, Copenhagen.

**Among the speakers and panellists**
Dr. Christian Ketels, Harvard Business School, Boston.
Ulf Johansson, Sweco Eurofutures, Tallinn.
Alf Vanags, Baltic International Centre for Economic Policy Studies (BICEPS), Riga.
Morten Hansen, Stockholm School of Economics in Riga (SSE Riga), Riga.
Per Unckel, County Governor of Stockholm, Head of the County Administrative Board, Stockholm.

**Moderator**
Jens Orback, Stockholm.

**Contact**
Dr. Mikael Olsson, Sida Baltic Sea Unit (mikael.olsson@sida.se); +46(0)732-572511.

The seminar is part of a two-day programme (7-8 July), The future Baltic Sea Region: possible paths of development in the light of the emerging EU-strategy for the region, organised by the Sida Baltic Sea Unit (Sida Östersjöenheten) and Baltic Development Forum in cooperation with CBEES, Södertörn University College.

For information on the full programme, see [http://www.sida.se/ostersjoenheten](http://www.sida.se/ostersjoenheten) or contact Mikael Olsson as above.
The Role of Regional Collaboration in the Baltic Sea Region of the Future

Dr. Christian Ketels
(HBS and SSE, cketels@hbs.edu)
Questions

• What is the medium- to long-term outlook for the Baltic Sea Region?

• What is the role of regional cooperation for the economic success of the Baltic Sea Region?

• What are the factors influencing the importance of regional cooperation in the Baltic Sea Region?
Dimensions

General Economic Trends
- Largely given
- Largely set outside of the region
- Largely outside of the control of specific policy makers

Policy Context
- Choice variables
- Set at the national or EU level
- Set by specific policy makers, not at the BSR level

Nature of Baltic Sea Region integration
- Choice variable
- Set at the BSR level

Outcomes
## Key Economic Drivers

| **Demographics** | • Region overall losing global share, but growing relative to European average  
• Key impacts on potential GDP and public finance |
| **Nature of global competition** | • Emerging countries becoming more important as markets and increase their competitiveness  
• Key impact on extent of rivalry and patterns of demand |
| **Energy prices** | • Prices are likely to rise or at least stay at current high levels  
• Key impact on relative value of specific industries and technologies |
Outlook: Following the Current Path

- Baltic Region continues to **outperform the rest of the EU** but likely to **loose global economic weight**
- **Convergence** of Baltic countries, Poland, and (with some more uncertainty) Russia to the Nordic levels of prosperity likely to continue
- Relative growth of the **economic importance** of Russia, Poland, and Baltic countries; Nordic share dropping of GDP dropping moderately
- Over the next 15 years, **demographics** benefit the GDP per capita level on the eastern shores of the BSR but then the trend moves into the opposite direction
The Role of Baltic Sea Region collaboration

- Turbo
- Enabler
- Opportunity for a new policy process

- But not a substitute for problems that have their root causes at the national and other levels
Policy Context
Scenarios for Three Key Dimensions

Russia’s economic strategy
- Determined focus on higher competitiveness
- Slow progress without addressing fundamental institutional weaknesses in the economy
- Economic nationalism

European Integration
- Revival of EU institutions and expansion process
- Stagnation at current level
- Deterioration into smaller groups of countries

Economic policies within BSR countries
- Fundamental reforms towards higher competitiveness
- Gradual modernization of the current economic models
- Failure to reform and slow reversal
Baltic Sea Region Integration

Scenarios

• NEW MODEL OF COLLABORATION
  • Refocusing on joint efforts to improve competitiveness
  • Creation of a new policy process rooted in multiple stakeholders from business, academia, regions, etc.

• STATUS QUO
  • Policy dialogue on political and economic issues
  • Project-based collaboration on individual issues with limited overall coordination

• EROSION
  • Refocusing on national and EU level as key policy arenas
When does Baltic Sea Region integration matter?

**Least**
- If European integration is fully revived
- If Russia moves firmly to economic nationalism
- If countries in the region fall back towards defensive economic policies

**Most**
- If European integration stagnates
- If Russia opens up
- If countries in the region reform aggressively
- If the BSR moves to a new model of integration
## Policy Scenarios and the Role of BSR Integration

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<thead>
<tr>
<th>EUROPE</th>
<th>New Model</th>
<th>Current Model</th>
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<td>Stagnation</td>
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<th>RUSSIA</th>
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<td>Muddling through</td>
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<td>Nationalism</td>
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<th>BSR Nations</th>
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<tr>
<td>Current Reforms</td>
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<tr>
<td>Defensiveness</td>
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</table>

**Impact of BSR Integration:**
- **High**
- **Medium**
- **Low**
- **None**
Best Case Scenario

Situation
- Russia addresses competitiveness, the EU regains its footing, and Nordic countries aggressively modernize their economic systems
- The Baltic Sea Region develops a new model of collaboration that enables deep integration across the region

Outcomes
- Region further improves its position within Europe and at least holds its position on a global scale
- Fast catch-up of the eastern countries, reaching western levels in 15 years
- Some slow down of growth in western countries due to demographics but no qualitative deterioration of their position
Worst Case Scenario

**Situation**
- Russia opting for economic nationalism, the EU unable to regain dynamism, and the Nordic countries attempting to defend old institutions
- The Baltic Sea Region becomes an increasingly less important arena for cooperation

**Outcomes**
- Region barely holds its position within Europe and falls behind global peers
- Moderate catch-up of the eastern countries, Baltic countries slowing down the most, high within diversity
- Slow down of growth in western countries, with top performers and companies moving out
Conclusions

• **Moderately positive outlook** for the economic prospects of the region

• Regional collaboration can become the ‘**turbo**’ of regional growth, **if** developments in the EU and/or Russia create the right conditions

• The **future of the European integration process** is the most critical driver of how important Baltic Sea cooperation will be

• The most benefits will occur, if the region moves towards a **new model of collaboration**, more in-line with the changing external conditions
Visions of the Future:
What can be achieved with a Baltic Sea Strategy?
What can be achieved with a Baltic Sea Strategy?
Cultural and man-made challenges to

Alf Vanags
BICEPS and NMS Consulting

www.biceps.org

Visby 7th July 2008
Some questions/issues

• How integrated is the Baltic Sea region?

• Is more integration achievable?

• Can one united and equal region, characterised by mutual respect and understanding, be created?

• The Baltic Sea
  – Barrier?
  – Or unifier?
The evidence: how integrated?

- Not very many other inland seas
  - Mediterranean
  - Black Sea
- Arguably, Baltic sea more integrated
  - Culturally
  - Economically
- Trade flow evidence
- Many ‘divides’ across the Baltic remain

Visby 7th July 2008
Some data on trade flows

Top four export partners 2007:

Latvia:
   Lithuania 15.5%; Estonia 14.2%; Germany 8.8%; Sweden 7.7%

Lithuania:
   Russia 15%; Latvia 12.9%; Germany 10.5%; Poland 6.3%

Estonia:
   Finland 19%; Sweden 16%; Latvia 11%; Russia 8%

Visby 7th July 2008
# The Great Income Divide (1)

**GDP per capita as % of EU 27**

<table>
<thead>
<tr>
<th>Country</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<td>Germany</td>
<td>117</td>
<td>115</td>
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<td>Finland</td>
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<td>Iceland</td>
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<td>Norway</td>
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<td>180</td>
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## The Great Income Divide (2)

### GDP per capita as % of EU 27

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<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<tr>
<td>Estonia</td>
<td>57</td>
<td>63</td>
<td>69</td>
<td>72</td>
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<tr>
<td>Latvia</td>
<td>46</td>
<td>50</td>
<td>54</td>
<td>61</td>
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<tr>
<td>Lithuania</td>
<td>51</td>
<td>53</td>
<td>56</td>
<td>62</td>
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<tr>
<td>Poland</td>
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<td>52</td>
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</table>

Visby 7th July 2008
The tax divide (1)

Taxes as % of GDP 2006

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<thead>
<tr>
<th></th>
<th>Personal income</th>
<th>All taxes</th>
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</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>24.5%</td>
<td>49.1%</td>
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<tr>
<td>Sweden</td>
<td>15.5%</td>
<td>48.9%</td>
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<tr>
<td>Finland</td>
<td>13.2%</td>
<td>43.5%</td>
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<td>EU 15</td>
<td>8.7%</td>
<td>40.5%</td>
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## The tax divide (2)

### Taxes as % of GDP 2006

<table>
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<th>Personal income</th>
<th>All taxes</th>
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<tr>
<td>Estonia</td>
<td>5.6%</td>
<td>31%</td>
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<tr>
<td>Latvia</td>
<td>6.0%</td>
<td>30.1%</td>
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<tr>
<td>Lithuania</td>
<td>6.9%</td>
<td>29.7%</td>
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<td>EU 15</td>
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Visby 7th July 2008
## The labour market divide (1)

<table>
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<tr>
<th>Country</th>
<th>Collective bargaining coverage</th>
<th>Trade union density</th>
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<tr>
<td>Sweden</td>
<td>90%</td>
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<tr>
<td>Finland</td>
<td>90%</td>
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<tr>
<td>Denmark</td>
<td>80%</td>
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The labour market divide (2)

<table>
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<tr>
<th></th>
<th>Collective bargaining coverage</th>
<th>Trade union density</th>
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<tr>
<td>Lithuania</td>
<td>10%</td>
<td>14%</td>
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<tr>
<td>Latvia</td>
<td>20%</td>
<td>16%</td>
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<tr>
<td>Estonia</td>
<td>25%</td>
<td>11%</td>
</tr>
<tr>
<td>Poland</td>
<td>35%</td>
<td>16%</td>
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</tbody>
</table>
Some implications of the divides (1)

• Capital flows: from rich to poor countries
  – Swedish/Nordic banks dominate Baltic states
  – Telecoms
  – Retailing

• Labour flows: partly the other way
  – Not as strong as to UK and Ireland (more attractive tax regimes?)

• Services flows: mixed/contradiction?
  – Call centres/cheap labour
  – Laval and partners/Vaxholm

• Full economic integration very difficult while divides remain

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Some other differences/barriers

• Transparency/honesty/trust
  vs
  opacity/corruption/lack of trust
• Attitudes to US
• Attitudes to Russia
• 9 countries 8 currencies
  – Baltic states keen to adopt euro
• Language: real integration requires adoption of common language for collective communication

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Education/research

• Strong potential for collaboration
• In practice disappointing: extraordinary conservativism in education
• Even close to home
  – SSE/SSE Riga
  – SITE/BICEPs
• EU 6th /7th Framework Programmes
  – No Scadinavian/Baltic partners
• Exception: Eurofaculty CBSS initiative
  – History now (Pskov EF)
Baltic Sea itself

• Ecological status of Baltic: collective interest of ALL baltic sea states: potential for promoting integration
• Recognised in creation of Helsinki Convention ...governed by HELCOM
• BalticSTERN – costs and benefits of cleaner Baltic Sea
• Involves partners from all CBSS states except Iceland and Norway
• Including Russia

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Role of Baltic Sea Strategy?

• Considerable achievement for group of EMPs to get European Parliament to adopt ‘Baltic Sea region strategy’
• EU strategy by June 2009
• More than ‘just another document’?
• Education/research and Baltic Sea issues most promising/least contested areas for progress
• Key question: will the EU come up with new funding??

Visby 7th July 2008
One Baltic Sea
-three futures
Our input

- A Baltic Sea Panel
- Strategies, programmes and foresight studies
- ESPON findings
- Consultations with sector specialists
Our points of departure

Baltic Sea Futures

Politics
Economy
Security

Environment
Climate
Energy

Infrastructure
Business
Transport

Culture
Human resources

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Main stream …

• A positive and hopeful undertone
• Some wild cards …
• Plenty of talk and rhetoric – lack of leadership

(Is national politics ready for globalisation and future challenges?)

• Do current events and developments indicate a shift of old paradigms?
Wild Card 1

Russia
Wild Card 2

Energy
Environment

- Few doubt **what** to do …
- … and **who** to do is clear
- But **when** to do is postponed and …
- … if to do still seems to be a question in parts of BSR

Preliminary agreements of reduction of nutrients reaching the Baltic Sea according to HELCOM Baltic Sea Action plan (*adopted in November 2007*)
Demographic change

- A challenge shared by all (and some more than others)
- Working longer and smarter will probably not be enough
- Neither urbanisation and internal migration, nor …
- … increased immigration will be quick fixes (or easily tolerated?)
Wild Card 5

Education and innovation

• So far so good!
• But …
• Are good education systems **good enough** for the future?
• Are they **adaptive** enough to new needs and demands?
• Are the BSR universities and research environments **attractive** enough for top students and future Nobel prize winners?
North East Passage

- The Northwest passage was ice free for the first time last summer
- The Northeast passage will probably be open in 15–20 years
- How will this change flows of goods between Europe and Asia/US west coast?
- How will it affect security interests and cooperation in Europe?
"Cards" and "filters"

History
Macro vs Micro
Globalisation
Time

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The pictures

**YELLOW**
- "Business as usual"
- Mode of thinking: "I win you lose"
- Politics fall short
- Fight for resources
- Baltic Sea dying
- Positive economic development
- Education systems upgraded
- Social unrest

**RED**
- "Back in the USSR"
- Mode of thinking: "Government"
- Nationalistic agendas
- Fight for resources
- Baltic Sea dead
- Slow economic development
- Education systems fall short
- Insecurity and fear

**GREEN**
- "Better life for most"
- Mode of thinking: "Governance"
- Cooperation
- Shift of resources
- Baltic Sea recovers
- Rapid economic development
- Education system using “next practice”
- Inclusion

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A final remark …

Will political leaders become mature enough to embrace globalisation and look beyond national borders and opinion poll agendas … … and will “the market forces” be able to adapt to and facilitate change fast enough?

Or does it have to get worse before it gets better?
The future Baltic Sea Region
Possible paths of development in the light of the emerging EU-strategy for the region

Contact information and short biographies of organisers, presenters and discussants.
Organisers

**Mikael Olsson**
Dr. Mikael Olsson has for close to 20 years worked extensively with contemporary issues relating to economic transformation in the former Soviet Union and Eastern Europe. He has held positions with the Dept. of East European Studies, Uppsala University, the Stockholm Institute for Transition Economics (SITE), Stockholm School of Economics, the Centre for Baltic and East European Studies (CBEES) and the National Institute for Working Life. He currently works as an analyst with the Baltic Sea Unit of the Swedish International Development Cooperation Agency (Sida) and is also project leader for a research project at Södertörn University College and. In addition he runs his own consultancy (Mod Cons HB). During 2008 he has worked as project leader for the two-day programme on the Future of the Baltic Sea Region.

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http://www.sida.se/ostersjoenheten
http://web.mac.com/mikeswe

**Margrethe Søvik**
Dr. Margrethe Søvik holds a PhD in Slavic Languages from Stockholm University and is currently working as a researcher and teacher at the School of Gender, Culture and History and the Centre for Baltic and East European Studies (CBEES), Södertörn University College, Stockholm. She has been a project coordinator for the programme, responsible for practical issues and coordination of the workshops.

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**Adam Kanne**
Adam Kanne is Deputy Director at Baltic Development Forum in Copenhagen. Adam has a background in international diplomacy working as political advisor to the High Representative to the supreme civilian authority in Bosnia and Herzegovina where he served for five years. Adam also coordinated the process of transferring the mandate to carry out democratic elections from the International Community to the local authorities. During the Swedish EU presidency in 2001 Adam formally represented the Swedish government at OHR. In August 2008, Adam will join the leading Nordic communication firm JKL in Copenhagen. Adam has an LL.M. in international law from Uppsala University and an MBA in international management from the Fisher Graduate School of International Business in Monterey, California. In his spare time Adam is a passionate diver, sailor and cook and has a special interest in Californian wines.

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