

Baltic Development Forum
*The leading high-level network
for decision-makers from business,
politics, academia and media
in the Baltic Sea region*

REPORT

Valkendorfsgade 13
P.O. Box 1127
DK – 1009 Copenhagen K
Denmark
Telephone: + 45 33 70 71 30
Fax: + 45 33 14 13 94
www.bdforum.org

CHALLENGES FOR THE BALTIC SEA REGION'S TRANSPORT INFRASTRUCTURE

*Report from the
Baltic Development Forum
Round Table*

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is a non-profit organisation.
Its mission is to
advance the growth potential
of the Baltic Sea region
through the forging of new partnerships
between leaders from business,
national and local government,
academia and media.*

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This document has been prepared by a forum of executives
from transport companies, industry, and organisations.

Presented at the Baltic Development Forum Summit in Riga, October 2003

**REPORT FROM THE BALTIC DEVELOPMENT
FORUM ROUND TABLE**

**“CHALLENGES FOR THE BALTIC SEA REGION’S
TRANSPORT INFRASTRUCTURE”**

**This document has been prepared by a forum of executives from transport companies, industry,
and organisations within the framework of Baltic Development Forum.**

**The results of the Baltic Development Forum Round Table is to be presented
at the Baltic Development Forum summit in Riga on 5-7 October 2003**

September, 2003

EXECUTIVE SUMMARY

The Baltic Development Forum Round Table was established at the Baltic Development Forum summit in Copenhagen 13-15 October 2002. The Round Table's mandate was to discuss the private sector priorities for development of the transport sector and infrastructure in the Baltic Sea region. Three Round Table meetings have been held during 2003. **Participants agreed** early in the process, that the Round Table should not promote individual infrastructure projects or carry out new major research. Instead **the Round Table has focused on identifying a number of strategic issues** of primary importance for the future development of the transport sector in the Baltic Sea region as a catalyst for economic growth. The Round Table advocates that focus should be on the unique opportunity of revitalising and strengthening the position of the Baltic Sea region through a coherent development of its transport sector.

The Round Table proposes to the Baltic Development Forum Summit to emphasise the importance of and to support the development of the transport sector in the Baltic Sea region. **The Round Table gives priority to eight strategic issues for the Baltic Sea region**, its government and its private sector:

1. **Create documentation for and acknowledging the importance for European development of a rapid regional economic development and integration of the Baltic Sea region.**
2. **Promote a vision for exploiting the Baltic Sea region's unique perspectives for development of transport systems and infrastructures.**
3. **Promote the development of the Baltic Sea as an increasingly important "gateway to Russia and the Far East".**
4. **Evaluate and promote the "Baltic Sea region of modern intermodality".**
5. **Support and develop the unique regional "importance and value of air transport".**
6. **Strengthen and promote "commercial/sustainable development of Motorways at Sea and Short Sea Shipping".**
7. **Document the economic benefits of an accelerated harmonization of standards. Promote a "Fast track harmonization pilot project" or implementation programme.**
8. **Make a commitment to implement a joint framework/programme for operational PPP's (private-public partnerships, national-international).**

The Round table suggests that the Baltic Development Forum Summit underlines the importance of and give political backing to these strategic issues in dialogue with the EU, national governments and the industrial sector of the Baltic Sea region. The need for consolidated efforts has been highlighted through this initial Round Table process, which **encourages a further strengthening of the direct dialogue between the private sector and governments/the EU**. Support of these strategic issues will encourage the involved parties to move in the same direction and it creates the platform for establishing the necessary financial commitment to strengthen activities for transport sector development.

The Round Table encourages the Baltic Development Forum to take responsibility for a follow-up of the Round Table. **The Round Table further urges decision makers at the Riga Summit to endorse this follow-up** and to ensure proper political and financial support within the Baltic Development Forum.

INTRODUCTION

The development of the transport infrastructure is an issue occupying the minds of politicians and planners today. It is generally agreed that an effective and reliable transport sector is an important prerequisite for economic growth, and successful development of the transport modes in a sustainable and effective way is regarded as one of the most important success parameters for future economic growth. This is also the case for the Baltic Sea region. The Baltic Sea region is currently developing fast and is expected to continue to do so concurrently with the process of the general European integration. Moreover the opening of commercial barriers during the last decade has generated new demands for mobility and efficient transport solutions.

At the Baltic Development Forum summit in Copenhagen in October 2002 it was decided to set up a **Round Table** where the private sector in the Baltic Sea region - industries, shippers and operators - could contribute to the ongoing debate and determine priorities for development of the transport infrastructure. The Baltic Development Forum Round Table was established in the beginning of 2003 and executives from around 50 transport companies, industry and organisations have participated in the work. Three meetings have been held in 2003 - in Copenhagen in March, in Hamburg in June and in Stockholm in August.

This document is **an address to the Baltic Development Forum Summit** outlining the views of the Round Table on the priorities for transport sector development and the overall legal and economic framework in the Baltic Sea region. There is a need for an open dialogue between politicians, planners and the private sector, and it could be expected that the private sector will show great commitment in contributing to this important development, given the right conditions.

In the coming years, the **development in the Baltic Sea region will be shaped by the enlargement of the EU**. From being an exterior border, the Baltic Sea will become an internal EU Sea and present a barrier for the further development of the internal market in the EU. This fact is also recognised in the June 2003 report on the trans-European transport network from the high level group chaired by Karel Van Miert¹. Existing transport schemes in the Baltic Sea region will have to be developed and modernised into an intermodal, sustainable and coherent transport system.

The Baltic Development Forum Round Table regards the transport system as a coherent system where the different transport modes each have their important role to play. For historical reasons the different parts of the transport system may not have been developed in an optimal way, and the enlargement of the EU in the Baltic Sea region creates a unique opportunity for the development of a transport sector adapted to modern needs. The transport sector in the Baltic Sea region will have to be developed with respect to intraregional connection as well as interregional transport corridors connecting the Baltic Sea region with North- and Mid-Europe and Russia.

Although focus is also needed on alternatives to road transport, to avoid congestion and utilize the potentials of other transport modes, It should be recognised that road transport is fundamental for the economic development of the region. It is also important to remember that the volumes and distribution of transport demand will depend on the overall supply situation including available infrastructure, transport costs, travel times, flexibility, quality, legal framework, etc. The EU transport policy asks for **a sustainable, intermodal, effective and balanced transport system**. The Baltic Development Forum Round Table agrees in these overall principles and the suggestions given below should be viewed in this light.

The Baltic Development Forum Round Table advocates that focus should be given to the unique opportunity to revitalise and strengthen the position of the Baltic Sea region. The Round Table has identified eight strategic issues and urges the Baltic Development Forum Summit to highlight the importance of and lend support to the development of the transport sector in the Baltic Sea region. The strategic issues are further developed below.

1.

¹ The June 2003 report from the Van Miert High Level Group and Communication from the Commission: "Developing the trans-European transport network: Innovative funding solutions", COM(2003) 132 final, April 23, 2003.

Create documentation and acknowledging the importance of European development of a rapid regional economic development and integration of the Baltic Sea region

With **the extension of the European Union by 10 new member countries**, some of which have direct access to the Baltic Sea, the prospects of the Baltic Sea region have changed. The northern part of Europe now has a broader and more consolidated representation in the European forums and a stronger platform for developing and exploiting the obvious potential for economic development in the region. Basically, the Baltic Sea has moved away from the position of being an effective physical, commercial and cultural borderline between EU and non-EU countries - both in the East-West and in the North-South directions. With the integration of the new member states by January 2004, the strategic position and importance of the Baltic Sea will change fundamentally.

The Baltic Sea region is an economic area of about 100 million people in 10 countries. It is connected in business networks prevailing within the region, and it encompasses a rapid development and integration of Russia. To support the expected **regionalisation of economic activities in Europe** and to sustain the growth potential of the Baltic Sea, regional issues should be given preference to national issues. The potential for regional development go beyond the interest of national borders and can to some extent not be effectively exploited without the encouragement of the private sector. Early and consistent transport sector investments can initiate and sustain viable economic activities of other sectors. Development of the transport infrastructure is a priority in the Second Northern Dimension Action Plan, 2004 - 2006, with focus on transport bottlenecks and (maritime) safety, also in the light of the enlargement.

A community initiative is important, because the delimitation of the Baltic Sea region is not given by the borders of the countries with a Baltic Sea coastline. For example in Poland and Germany, only the Northern and to some extent central parts of the country is in the economic sense part of the Baltic Sea region. Moreover, the future development and integration of North-West Russia into the Baltic Sea region economic activities is fundamental for both the region's position on the European map and for a coherent development of Europe and Russia.

Special emphasis should be put on the **perspectives of the transport sector's connections to Russia** in general, and through the St. Petersburg and Kaliningrad areas. The economic development of these regions will be supported by efficient transport connections to the EU and the rest of the world through the Baltic Sea and will strengthen the Baltic Sea as a gateway to the Russian Federation.

It is therefore important that governments and the EU develop and agree on a **visionary strategy** for the Baltic Sea region - including valuation of the transport sectors importance for the economic and institutional development of the region. Governments, the EU and private sector partners must support this with committed regional and community initiatives for the Baltic Sea region. This strategic position should be supported on the community and regional levels, while at the same time land transport infrastructure to and from the Russian and European hinterland is developed.

Baltic Development Forum Round Table suggest that the EU gives focus to the delimitation and development the Baltic Sea region as an major European region, comprised of old, new and potential members of - or significant partners to - the EU. A separate political agenda for economic growth and development of the region, including a Baltic Region Development Programme, in co-operation with Russia and the regions of St. Petersburg and Kaliningrad should be given priority and have private sector commitment.

2.

Promote a vision for exploiting the Baltic Sea region's unique perspectives for development of transport systems and infrastructures

The **connection between regional economic development and transport sector efficiency** is well known. The significance of bottlenecks in transport infrastructure and the inefficiency of transport operations for mobility and industrial co-operation are important items on the national and international agenda. The changing geo-political environment within and around the Baltic Sea calls for a **renewed, co-ordinated and intensified development**. The development of the transport sector in the region will seriously influence the speed of development and integration, if not the direction.

Apart from the relatively short - although very important - coastline to Russia, **the Baltic Sea will soon become an intra-EU sea - in fact the only one.** The Baltic Sea region can be regarded as the "Alps of Northern Europe", since the importance as a barrier for the transport sector and the regional development of the northern part of EU is comparable to the importance given to the Alps as a barrier for the southern part of the EU. As a consequence, the development of the transport sector in the Baltic Sea region should be given similar **attention and priority in EU transport sector policy and infrastructure planning.** In order to develop new, innovative and multimodal transport solutions and logistic links, a solution will include sea-based or sea centred transport modes in combination with other modes. The potential for developing environmentally friendly transport - by combining all modes including sea transport on significant hauls - should be evaluated and exploited.

Improved transport corridors will **strengthen** not only the **mobility within the Baltic Sea region**, but also the region's **accessibility and connectivity to the EU region.** Furthermore, the Baltic Sea represents a major access route to the Russian Federation in the hinterland of Russia's Baltic Sea coastline. In addition to land transport corridors the Baltic Sea region also provides opportunities for transport corridors at sea. It is envisaged that using **relatively low cost sea transport** (compared to the cost of developing infrastructure in mountains), **transport corridors can be developed**, within a relatively short time span, if the necessary political initiatives and prioritisation are made. Further, modern high speed rail technologies could be taken into consideration as a passenger transport mode to and from Central Europe as well as connecting metropolitan areas of the Baltic Sea region, if and when the necessary demand for this type of transport is developed.

The Baltic Development Forum Round Table finds that the latest development in the Baltic Sea region calls for a renewed and optimistic **development of the transport systems**, to and from the Baltic Sea as well as internally in the Baltic Sea region. It should receive full attention in the planning of infrastructure development in EU and member states and be based on **a multi-modal approach**, including the potential establishment of:

- North-South and East-West land transport routes, including motorways and high speed railways.
- A fixed Fomer Belt link.
- New short sea and ferry connections.
- Motorways at sea across the Baltic Sea.
- Intra- and interregional air transport systems.

The various projects will have to be prioritised, taking into account the time span of the projects. Specific priorities should be given to infrastructure and transport systems that can support the integration of Russia into the European transport system and economic development.

3.

Promote the development of the Baltic Sea as an increasingly important "Gateway to Russia and the Far East"

It is generally acknowledged that the integration of Russia in the economic development of the Baltic Sea region and Europe has a dominant position on the agenda of governments and private sector. Therefore a coherent development of the transport systems connecting Russia to Europe should be given high priority.

For many years the Baltic Sea region has been an important gateway to Russia. In the coming years it will become even more important, due to the fact that long haul sea transport systems can be developed within a relatively short time compared to the construction of new high volume long distance land transport corridors.

In spite of the geographical barrier, the Baltic Sea is the **fastest route** to many parts of Russia and the Far East. A rapid and consolidated development of sea transport, port operations and hinterland infrastructure is vital for the future development of freight and passenger transport flows on these routes not on short and medium term, but potentially on a longer term basis, if and when the economic development is sustained by and through this gateway. In this perspective the Baltic Sea is in fact not a barrier, but an important strategic and operational corridor between Europe and Russia.

The "gateway to Russia" should be given priority both in the short and long term. **Consolidated efforts** of an international scale are needed by the private and public sectors. To what extent a major public-private partnership (PPP) can successfully be created to develop and operate the "gateway to Russia" is not clear, but **the Baltic Development Forum Round Table finds** that the attempt should be made. Such initiative should be encouraged by governments and the EU by providing a **common vision** and commitment to support and be the catalyst for the development of a high capacity and efficient gateway to Russia through the Baltic Sea.

The Baltic Development Forum Round Table further suggests that it is considered to give the "gateway to Russia" a separate policy and programme under the relevant EU-policies, including the Northern Dimension. This could be a significant and concrete action bringing Baltic Sea issues onto the European agenda.

4.

Evaluate and promote the "Baltic Sea region of Modern Intermodality"

The transport system is a **coherent system** where the different transport modes - road, rail, air and sea transport - each have their important role to play, and development of a sustainable, inter-modal, effective and balanced transport system will be of great importance for the economic development of the region.

The Baltic Sea region has a physical structure, a size and an industrial structure and volume of transit transport flows that makes the region - in the new perspective - an ideal candidate for regional development of what could be called "**modern intermodality**". This concept implies an efficient and modern interaction between the various transport modes, including road, rail, sea and air transport. The prospects of increasing volumes and an underdeveloped transport infrastructure provide the Baltic region with a unique opportunity to develop a multimodal transport system, utilising the opportunities offered by the presence of the Baltic Sea and making the combined use of all modes possible.

The connection of the Baltic Sea region to the central parts of Europe is predominantly based on land transport - rail and roads. The priorities of the TEN² Corridors are presently being developed. It is important to secure a balanced development of the different modes. Separate high-speed railways for passenger traffic, modern technology and high-quality express freight traffic could be solutions to a number of problems relating to the railways today.

The concept of intermodality implies that transport of goods must be based on transport units, which can be easily transferred between modes. **Modern container transport** requires effective terminal structures, including the physical structures as well as sophisticated information and control systems for handling. A total network of container terminals and intermodal added value services is needed. Therefore, in order to develop an intermodal transport structure of the Baltic Sea region, all interaction between modes should be considered, including terminal structures and information systems. Likewise is intermodality vital for **passenger transport** where transport can be made more efficient by optimising the interaction between transport modes. Furthermore intermodal hubs should harvest the **synergies of being hubs for both goods and passengers**.

The development of a Baltic Sea region hub structure, including the optional number and position of regional hubs for intermodal transport, will **require vision and commitment** from the governments, the private sector and a number of national enterprises. The hub structure should optimise both the intra- and interregional connections to the Baltic Sea region with the rest of Europe and must be intermodal. Short term or specific interests should not stand in the way for the **medium and long term interests of the whole region**, since all countries or regions will benefit equally by establishing the most effective structure.

The Baltic Development Forum Round Table encourages the EU and national governments to develop a vision and strategy for intermodality in the region and thus within a short time to provide a vision or master plan for "The Baltic Sea region - the region of modern intermodality". It should focus on the interaction between transport modes. It is important to invite the private sector to participate in an untraditional partnership for this development. Early implementation of results will

² TEN: Trans-European Networks in the fields of transport, communications and energy.

have a significant influence on the commercial and economic benefits of this initiative and for its effects on regional economic growth and integration.

5.

Support and develop the unique regional "importance and value of air transport"

The importance of cheap, fast and flexible transport for mobility and regional development is well known. In the Baltic Sea region, with its demography, industrial structure and geography, **an efficient network of airlines is crucial for the intra- and interregional mobility and economic development.** Rapid development of high frequency and relatively low cost airline systems is fundamental in order to exploit the potential for intraregional economic development and cohesion.

Liberalisation of the airline industry in general is on its way, and from May 2004 all the Baltic Sea states except Russia will be part of a liberalised air regime, which includes i.e. free market access. In this situation the region needs a regional consolidation in order to **support a regional network or hub structure.** Integration of the air transport network in the Baltic Sea region is essential for developing the necessary market demand as a basis for a regional hub structure. An effective regional hub structure will benefit the regional actors in the field, who would otherwise have to seek less optimal solutions using hubs in other regions, and sustain the economic development of the region.

The barriers of this consolidation mainly concern market access outside the EU, national ownership, control clauses and state ownership of airlines. Thus, there is a need to **include Russia in the free market access area** and to **privatise air carriers and airports** in the region. In connection with the liberalisation of commercial and legal framework for air transport within the EU, special emphasis should be put on the integration of the European and Russian airline networks, taking into account the current differences.

The development of an efficient air transport system is of vital importance for passenger transport in the Baltic Sea region and thereby fundamental for the economic development of the region, since sea transport and other transport alternatives can not match the speed and frequency which can be provided by air transport. Therefore, the development of the region depends on the availability of an air transport system, which can satisfy the needs of time sensitive passenger transport and some kinds of high value and time- or otherwise sensitive types of goods.

A **vision and strategy** for the air transport sector in the Baltic Sea region is urgently needed, because the development of the airline corridors and international hubs is instrumental to intraregional movements. Therefore, the development of this sector can determine the speed of economic development, if financing is available.

The Baltic Development Forum Round Table recommends that emphasis is put on developing conditions for an efficient network of intra- and interregional air lines in the Baltic Sea region. In this respect, Russia should be included in the free market access areas, and air carriers and airports should be privatised in the region or should be developed as more transparent public-private partnerships. Special emphasis should be put on the integration of the European and Russian airline networks, taking into account the current differences.

6.

Strengthen and promote "commercial and sustainable development of Motorways at Sea and Short Sea Shipping"

Utilising **short sea shipping, ferry transport** and other concepts of short distance sea transport modes has a **significant potential** in the Baltic Sea region. A strong development of sea transport in the region will no doubt materialise in time, in line with the development of economic activities, but early investments in these systems will be vital to speed up the development process. **A significant barrier, however, lies in the fact that it requires a common public-private understanding** - if not partnership. Except for port development, sea transport is almost completely managed by the private sector, and the public sector can only manage infrastructure development through regulation of port activities and development of hinterland infrastructure.

This hampers development: The private sector is hesitant to invest until the market has developed, and the public sector is normally not capable of securing early investments that could develop the market for the private operators. This "Catch 22" calls for integrated co-operation, creative and innovative solutions and longer-term commitment by both the **public and the private sector**. At the same time, this should **not lead to distortion of competition** and state aid rules must be observed.

Four sea motorways have been suggested in the June 2003 report from the Van Miert High Level Group to be included in **the priority list for the trans-European network**, including Motorway of the Baltic Sea, linking the Baltic Sea Member states with central and western Member States. Maritime routes should according to the report from the group be as important as motorways or railways in the trans-European network. The report points to the expected difficulties of Member States to prioritise ports, and suggests that a global tender can be made to ports and maritime companies, leaving the choice of ports to candidate consortia.

The Baltic Development Forum Round Table emphasizes that the concept of motorways at sea in the Baltic Sea region should include not only connections between Baltic Sea Member states and Central and Western Member States, but also intra-Baltic Sea connections. The Baltic Development Forum Round Table welcomes creative ideas to overcome the "Catch 22". However, if public support is considered, it is of outmost importance that this does not lead to distortion of competition. There should be a balanced dialogue between the private and public sector about possible ways of developing motorways at sea in order to avoid over- and underinvestment in terminals and ferry capacity.

7.

Document the benefits of an accelerated harmonization of standards. Promote a "Fast track harmonization" pilot programme.

The lack of common standards and legal frameworks presently hampers trade and economic growth in the Baltic Sea region in a number of ways. Examples of this include documentation, insurance matters, administration, security issues, technical standards, taxation, licence, light dues, custom procedures, transport documents, transport of dangerous cargo, use of train conductors, railway interoperability (safety and signalling systems, width of railway systems) and language

(English). There is also the problem of waiting at border crossing points, especially at Russian borders.

The situation calls for an **accelerated harmonization process**, including implementation of present EU rules and standards in the new member states as well as further harmonization within the EU. Moreover, focus should be on Russian adoption of WTO rules and use of Russian standards that are similar to EU requirements. Although Russia will not be part of EU's formal legal structures, Russia could on a practical level move very close to EU rules and thus remove many barriers for companies.

There is thus an urgent need for harmonization and policy measures related to all modes, including ferry and rail transport in particular and container transport in general throughout the Baltic Sea region. There is also a need for improvement of modern information systems. The process should build on already identified EU bottlenecks or barriers for free trade. For the Baltic region, these results should be assessed in light of the enlargement. Identification of the most serious harmonization problems is needed in order to facilitate the harmonization process and secure communication between the various authorities involved. As a part of this process, the possibilities of removing barriers and bottlenecks in relation to Russia should be addressed. Further, issues related to the technical problems of interoperability and operators' abilities to interact should be addressed.

The Baltic Development Forum Round Table strongly recommends that harmonization of standards and legal frameworks in the Baltic Sea region are given high priority. It is important that harmonization and deregulation of markets are developed simultaneously. Based on already identified barriers, the Baltic Development Forum Round Table strongly recommends an accelerated harmonization of standards. The Baltic Sea region could be an ideal candidate as a pilot region for practical implementation of common concepts of harmonization of EU rules, or even for a "Fast track harmonization" Region of the new EU and Russia.

8.

Commitment to implement a joint framework/programme for operational PPP's (private-public, national-international)

Presently, the EU Commission and other financial institutions review **the priority TEN Corridors in the light of the enlargement of the EU**, and the importance of extending the TEN network into the Baltic Sea region is acknowledged in the recent report from the Van Miert High Level Group (Femer Belt and Motorways at Sea).

In the Baltic Sea region, there is an increasing understanding of **the need for both public and private commitment - finance and risk sharing** - to secure that the many proposed transport infrastructure plans, such as the TEN Corridors actually **materialise**. On the other hand, the concept of PPP is still relatively new and the necessary legal frameworks are not yet commonly understood or accepted. For some parties, the PPP model is the solution to everything, for others it is just "old wine in new bottles". Nevertheless, if PPPs are to be successful across national borders, a consistent legal and commercial framework must be established. Recent EU documents confirm the need for such a framework and also recognize the difficulties when it comes to the practical implementation of the general ideas. However, a number of ideas have been brought forward, and the Commission has announced that it will produce a Green Paper on public-private partnerships and European public contracts law.

The Baltic Development Forum Round Table finds that there is a need for **a consistent and common policy** for the evaluation and promotion of PPPs in the Baltic Sea region if the region is to successfully utilise the PPP option for promoting the TEN Corridors, also in the Baltic Sea region. It is envisaged that a common policy and implementation of the PPP actions related to part of the TEN Corridors will enable an early development of these corridors in the interest of the region's economic development.

Besides this, the possibilities of more **traditional ways of financing** infrastructure should not be forgotten, in spite of economic slowdown and budgetary constraints. Thus, public financing through public loans/guarantees could alleviate the pressure on the public budgets and still provide capital for infrastructure project. There is basically also a need to clarify to what extent infrastructure should be user financed or tax paid.

The Baltic Development Forum Round Table encourages governments and the private sector in the Baltic region to develop a PPP intervention programme in relation to the TEN Corridors and to support the implementation of this intervention.

LIST OF EXECUTIVE PARTICIPANTS IN THE BALTIC SEA REGION ROUND TABLE 2003

“Challenges for the Baltic Sea Region’s Transport Infrastructure”

Industry:

Alexei Boubnov, Managing Director, Pulkovo Airlines, Russia
Bo Haugaard, Project Manager, Copenhagen Airport A/S, Denmark
Christel Wiman, Managing Director, Stockholms Hamn, Sweden
Erik Østergaard, Director, Scandlines, Germany
Frode Sørensen, Director, Danfoss, Denmark
Gunnar Sibbmark, Director, European Corridor, Sweden
Hans-Ulrich Wolff, Country Director, Uniconsult, Germany
Heikki Nissinen, Managing Director, Port of Helsinki, Finland
Ingvar Nilsson, Vice President, Schenker, Sweden
Jörn-Peter Kassow, Director, Eurogate, Germany
Kim Richter Petersen, Head of Nordic Structured Finance, HSH Nordbank, Germany
Krzysztof Gromadowski, Director, Port of Gdynia, Poland
Lars Andersen, Director, SAS Group
Lars Karlsson, Managing Director, Copenhagen Malmö Port, Sweden
Maria Wall Petrini, Strategic Business Development Manager, Arlanda Airport, Sweden
Palle Dybdal Rasmussen, Chairman of the Board, Eurodek, Denmark
Peter Lundhus, Managing Director, Femer Belt, Denmark
Petteri Kostermäa, Vice President, Finnair OY, Finland
Riho Rasmann, Chairman of the Board, Port of Tallinn, Estonia
Stig P. Christensen, Director, COWI A/S, Denmark

Thomas Rössberger, Managing Director, Sweden
Tomas Dyrbye, Managing Director, Maersk Sealand Nordic, Sweden
Valdis Trezins, General Manager, Latvian Ass. Of International Road Carriers, Latvia

Organisations:

Jan Kuligowski, Head of Secretariat, VASAB, Poland
Jens Hennild, Director of Transport, Confederation of Danish Industry, Denmark
Ole Frijs-Madsen, Director, Baltic Development Forum
Raimo Mansukoski, Director, Confederation of Finnish Industry and Employers, Finland
Reinhard Wolf, Department Manager, Chamber of Commerce Hamburg, Germany
Uffe Palludan, Director of Research, Institute for Future Studies, Denmark
Wolf-Rüdiger Janzen, Secretary General, Kiel Chamber of Commerce and Industry, Germany

Authorities:

Andulis Zidkovs, Director, Ministry of Transport and Communication, Latvia
Andres Tint, Deputy Secretary General, Ministry of Economic Affairs, Estonia
Bo Lindroos, Head of Department, Nordic Council of Ministers, Denmark
Michael Treder, Department Manager, Freie- und Hansestadt Hamburg, Germany
Peder Baltzer Nielsen, Head of Division, Ministry of Environment, Denmark
Per-Olof Gustafsson, Deputy Managing Director, The City of Stockholm Economic Development Agency, Sweden

Project Supervision:

Anne Ohm, Project Supervisor, COWI, Denmark
Malene Barenholdt Bruun, Project Supervisor, Baltic Development Forum
Tom Allersted, Project Supervisor, Baltic Development Forum