

WADDEN SEA FORUM

Thematic Group "Industry/Harbor"

Third Meeting (TG IH 3)

Wilhelmshaven, 16 – 17 September 2003

FINAL MINUTES

1. OPENING OF THE MEETING (WELCOME, ADOPTION REVISED AGENDA)

*Documents: TG-Ind/Har-3-1-1 Draft Agenda
TG-Ind/Har-3-1-2: Composition of all Thematic Groups*

The meeting was opened by the chairperson of the Thematic Group Ind/Har, Mr. Ahrens, who welcomed the participants to the third meeting of the TG Industry and Harbour.

Mr. Holzhausen, Nord-West Oelleitung GmbH (NWO) as the host of the meeting also welcomed the participants and informed the meeting on the NWO and the Wilhelmshavener Hafenwirtschafts-Vereinigung e.V. (WHV). The meeting **adopted** the proposed revised draft agenda, which is in **Annex 1**, without amendments. A list of the participants is in **Annex 2**.

2. ADOPTION OF THE MINUTES TG-2

Document: TG-2 joint workshop report, agenda item 7.4

The draft minutes were adopted without any amendments.

3. ANNOUNCEMENTS

Mr. Ahrens made some organizational announcements about dinner/lunch, the excursion at the NWO in the evening and the start of work at 9:00 on Tuesday morning.

Ms Ziebarth announced and introduced two studies which are related to the planned new Jade-Weser port at Wilhelmshaven. Firstly, the study "Bedarfsanalyse für einen deutschen Tiefwasser Container Terminal / Demand analysis for a German deep water container terminal" compiled by the Aktionskonferenz Nordsee (AKN) and secondly "Die Umweltauswirkungen des JadeWeserPort/ Ecological impact of the JadeWeserPort" compiled by WWF. Both studies are available only in German. Hard copies were distributed at the meeting and both studies are also available on the internet:

["www.aknev.org/bestell.html"](http://www.aknev.org/bestell.html) respectively "<http://www.wwf.de/presse/pressearchiv/artikel/01374/>"

4. BRIEF EVALUATION OF THE JOINT WORKSHOP TG 2

Document: TG-2 joint workshop report

The joint workshop TG-2 in June was a combined meeting with plenary, sector and thematic group sessions. The chair asked the participants for comments about structure and contents of the meetings.

Mr. Ahrens and Mr. Oswald stated that there was not enough time for the specific issue of the TG Ind/Har, however, the meeting agreed that all in all the workshop was very contenting, even though the structure, especially extra sector meeting was a little bit confusing at first. Furthermore, it was stated by all members that the joint meeting has some advantages like having close contacts to the other groups and to be informed about the progress in other working groups.

Mr. Ahrens pointed to the already at TG II selected specific trends of the industry and harbour sector. It was agreed by the meeting to add "specialization" to topic 6: "cooperation - concentration".

5. BRIEF INTRODUCTION TO THE FINALIZED EXTERNAL STUDIES (SOCIO-ECONOMY D, DK, NL; POLICY)

The secretary informed the meeting about the status of the external studies carried out in the framework of the WSF project.

Socio-economic analyses

The studies about socio-economy in Germany (by Planco) and Denmark (by COWI) were almost finished and available as drafts, but just in the national languages. English abstracts will probably be available by the end of September, whereas the whole Danish report will also be translated into English. As soon as these studies have been finalized they will be placed on the WSF website and the members informed by e-mail newsletter.

The Dutch part of the socio-economic study is elaborated by the SEOW project, which, however, will not cover all relevant issues as expected.

Policy & management study

The policy & management study "Review of International Legal Instruments, Policies and Management in respect of the Wadden Sea Region" compiled by the Oxford Brookes University, is nearly finalized and will be distributed and placed on the web site very soon. The executive summary will be distributed as a final draft version as soon as possible.

Sustainability study

A sustainability study "Review of international and national sustainability strategies and development of proposals for the main elements of a sustainability strategy for the Wadden Sea region" (by COWI) has recently been initiated and is expected to be presented in draft form at the WSF-3 meeting (30-31 Oct. 2003).

Follow-up study

Furthermore, the meeting was informed by the secretariat that a follow-up study "socio-economy" is envisaged to be carried out. The study should be based upon the analysis of the remaining gaps in the general socio-economic studies and the sector specific questions revised by the TGs. It should fill the gaps in information, evaluate the commons and differences between the countries and should give answers to sector specific questions/perspectives. The Team-meeting (TG chairs and secretariat) on 27.08.03 agreed at their last meeting that this follow-up study should be done by one consultant jointly for all issues and regions. The study will be carried out with consultation of sector experts and compiled in English by the German consultant PROGNOSE in close cooperation with their partners in DK and NL. The data/draft will be available at the end of November, in time for the next TG meetings in December 2003. The final report will be concluded some weeks later.

Mr. Ahrens stated that it should be ensured that all topics, listed by the TG Ind/Har will be covered by this follow-up study, especially the competition aspects between Wadden Sea ports with ports outside the area, such as Rotterdam.

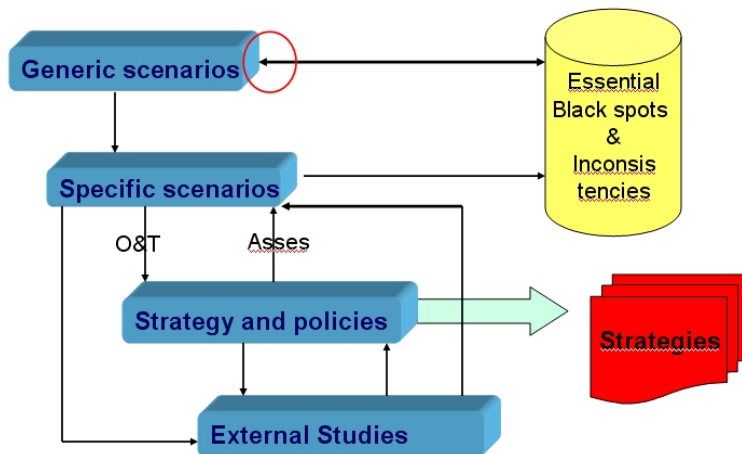
6. GENERIC AND SPECIFIC SCENARIOS

6.1 Introduction to the development of draft generic scenarios

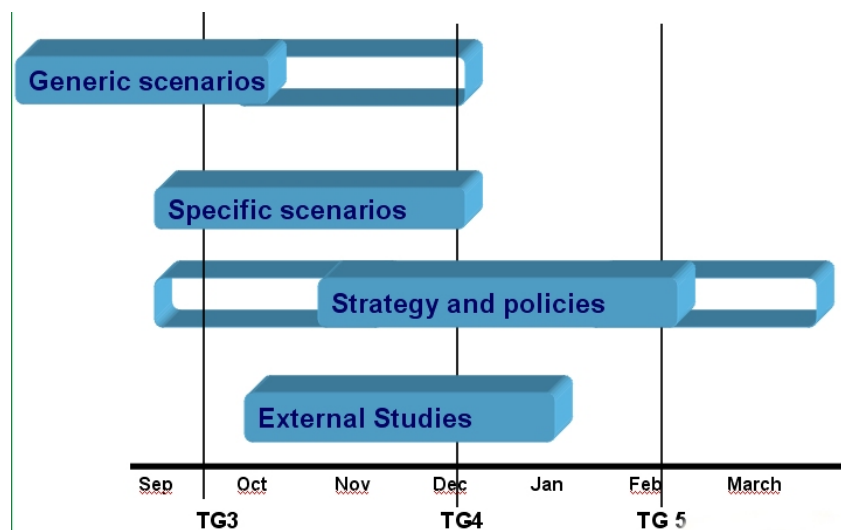
Document: TG-3-6-1 : First draft generic scenarios

The chairman introduced briefly the agenda item 6 by referring to the results of the TG 2 workshop and handed over the moderation of this topic to Mr. Vollmer. Mr. Vollmer shortly explained by power-point presentation the scenario building process in the context of the whole project to get a better understanding of where we are and where we want to go. The following scheme makes the different steps a bit clearer.

A description of the process could be found in the document TG 3-6-1. The defined black spots and lacks in plausibility of the generic scenario report will find its way into the revised version, elaborated after all TG 3 meetings have taken place.



A time table for the different working steps is given in the scheme below. The generic scenario report will be finalized by the end of October taking into consideration the comments from the TG's. The process of building specific scenarios has just started and will last until the end of 2003. On the basis of generic and specific scenarios, strategies and policies for a sustainable development of the Wadden Sea region will be elaborated. Additional necessary information will be provided by specific external studies.



6.2 Identification of black spots in the generic scenarios

After having explained the procedure of the different working steps, Mr. Vollmer introduced the axis and the skeleton of the generic scenarios, illustrated the differences of the worlds and introduced the procedure for discussion the generic scenarios. The aim of discussing the generic scenarios was to collect comments on plausibility and completeness and to provide suggestions for improvements. At the meeting of TG chairs on 27.08.03, it was agreed to discuss comments made by all TG's and to discuss these at the chair meeting and to decide, on the basis of this discussion, which amendments will be made to the generic scenarios. The description of the scenarios will then be revised and the final draft of the scenarios will be available at the end of November in time for the next TG meeting.

General comments

- "Future unlimited" wrong title for this world, because future is never unlimited.

- The question was raised, why "nature/environmental issues (biodiversity, climate change, nature protection)" is not included as a trend in the scenarios. It was discussed that regarding such a nature trend so many different aspects have to be covered so that it is hard to handle. Furthermore, developments of these aspects are hard to be foreseen. It was stated by the secretary that after the discussion with the TG chairs it was decided to leave out the trend "climate change" (the only aspect

under environmental issue) for the scenario description, because there is no clausal relation of the trend with any of the other trends. Climate change will happen or not and will affect all four worlds to a lesser or greater extent.

- It was stated that the given combinations, such as "global market" and "low freight traffic" (on a high level) in the cautious world, and "high technical innovation" and "low economic growth" in the challenging world are really possible.

- The trend "technical innovation" was discussed. "High technical innovation" does not necessarily mean that the possible product will have its way into the market (see e.g. UTS, "Magnetschwebebahn").

- the EU-aspect is not fully satisfactorily described in the text, more details are necessary. This task will be done by the TG Policy and Management.

Mr. Vollmer informed the meeting regarding the discussion in the TG Energy, that energy (supply, demand etc.) should be a generic trend because all other sectors and trends are influenced by energy issues. Therefore, energy supply will be added in each chapter for the description of the different worlds.

Comments about the scenarios

Cautious world

- better description of mobility
 - moving, job-hopping
 - travelling
- stress economic block
 - should be explained
- cargo traffic
- passive people? individualistic?
- EU influence on nations and regions not the other way around (from the citizen to EU)

Future unlimited

- EU structure
- very abstract word for Europe
- similar to the US today
- impacts on environment (time scale 2020, 2050)
- chance for better protection (time scale 2020, 2050)
- harbour concept

Challenging World

- innovation to look for chances
- "black market" (more a grey market? second hand (e-bay))
- "black market" together with community orientated people?
- only active people can stand this world (inactive people have no chance to survive).

Satisfied citizen

- title okay?
- economic growth depends on resources, independent of innovation? should be checked!

When revising the text it is recommended to contact economics, whether such a world is possible/plausible?? (low innovation, high eco. growth in an industrial world)

6.3 From generic to specific scenarios - sector specific consequences

To introduce sector specific issues in the scenarios, the meeting was asked to identify consequences of each world for the sector. The result of a first brainstorming was the working approach. Consequences in the four different worlds will be discussed for the following main sectors, which will be distinguished in more detail:

- Harbour development
- Industry: producing/processing
- Retail trade and tourism

It was agreed by the meeting to investigate the position of the sector on the basis of the following important factors/political/social priorities:

- (increasing) freight traffic and infrastructure (all goods, in the whole region);
- (increasing) container demand /supply (port and storage areas, short sea shipping, dredging; harbour development));
- (increasing) regulation (policies, safety demands); will have influence on opportunities and threats, information policies, labor market, economic stimulation (gov);
- social priorities (leisure activities; aging; demands for the region).

Specific Trends: Ind/Har

	Cautious world	Future unlimited	Satisfied Citizen	Challenging world
Freight traffic and infrastructure	+1	+3	+2	+1
container	+2	+3	+2	+2
regulation	+3	+1	+2 (+)	+1
social priorities	-1	+2	+3	0

Remark: -3 -2 -1 0 +1 +2 +3
decreasing ← → increasing

6.5 Inventory of possible strategies for the Ind/Har sector

After having built the specific scenarios, the next step in the work program would be developing strategies for the different sectors. It was intended to start this process at TG 3 in parallel to the identification of the sector specific trends. Strategies in this respect are policies, measures, actions and projects which will be carried out by the different stakeholders and institutions. The main aim is sustainable development, which means that strategies for sustainable development of the sector industry and harbour should be elaborated. If a strategy is able to “survive” or will be feasible in basically three out of the four worlds it is considered a robust strategy and therefore a strategy which would be worthwhile to pursue.

The following strategies for sustainable development of the industry and harbour sector were shortly discussed by the meeting:

- partnerships (e.g. between private and public)
- cooperation / specialization regarding harbours (fish, container,...)
- efficiency of regulations

It was agreed to continue with main emphasis on such strategies at the next TG.

6.6 Procedure further development scenarios

The meeting was informed that, on the basis of the outcome of the discussion under agenda item 6.3 and 6.4, the drafting team (Cibit and the secretariat) would elaborate draft specific scenarios. These would be discussed at the TG-4.

At the TG-4 plausibility, inconsistencies, gaps and black spots regarding the specific scenarios will be discussed. Furthermore, the discussion on the strategies for sustainable development of the industry and harbour sector will be one of the main issues of the next TG.

7. ANY OTHER BUSINESS

There was no other business.

8. NEXT MEETINGS

The fourth meeting of the TG Industry/Harbour is scheduled for 10-11 December 2003 at the IHK in Oldenburg, Germany. The meeting will start the first day in the evening with an informal meeting, the second day is a full meeting day from 8:00 - 17:00 hrs.

The fifth meeting was scheduled for 11/12 March 2004 and will be held in Esbjerg with Henning Nørgaard as host. The meeting will start the first day at about 13:00 hrs and will be closed the next day at about 13:00 hrs.

9. CLOSING

The chair thanked all participants for the constructive cooperation, the NWO and the Wilhelmshavener-Hafenwirtschafts-Vereinigung for being the host of the meeting and closed the meeting at 13:00 hrs on 17 September 2003.

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AGENDA

1. Opening of the Meeting (Welcome, adoption of Agenda)
2. Adoption of the Minutes TG-2
3. Announcements
4. Brief evaluation of the joint workshop TG2
5. Brief introduction to the finalized external studies (socio-economy D, DK, NL; policy)
6. Generic and specific scenarios
 - 6.1 Introduction to the development of draft generic scenarios
 - 6.2 Identification of black spots in the generic scenarios
 - 6.3 From generic to specific scenarios - sector specific consequences
 - 6.4 Discussion on the most important specific trends
 - 6.5 Inventory of possible strategies for the ind/har sector
 - 6.6 Procedure further development scenarios
7. Any other business
8. Next meetings
9. Closing