

Maritime cooperation from Estonian perspective

the views of the key stakeholders

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Themes:

- Main cargo and passenger flows
- Actors
- Competition
- Cooperation and clustering perspectives

Main cargo and passenger flows:

- Estonian export
- Estonian import

- Transit through Estonia from East (Russia) to West
- Transit through Estonia from West to East (incl. Asian trade to Russia coming by the sea)

- Transit through Estonia from South to North (Finland as the destination market)
- Transit through Estonia from North (Finland) to South

Main cargo flows:



Actors:

- Shipping lines: long distance/short distance (feeder)
- Ports
- Port terminal operators
- Forwarders
- Ship agents

- Bunkering service providers
- Tugboat service providers
- Ship-repair services
- Pilot operators, ice-breakers, lighthouses
- Actors in passenger related business (e.g. tourism companies)

Actors:

- There are mainly international structures in forwarding and some other functions
- E.g. Company CF & S (under the holding of BMLG): forwarding, ship owner, port operator, ship agent
- International structures having daughter companies in Riga, Tallinn and Helsinki

Actors:

In general:
very wide range of actors,
(potential) participants in cooperation

Competition:

- Pure business competition: very though
- Distortions resulting from states' policy (Russia)
- Changes resulting from EU policy

Cooperation and clustering perspectives:

- East-West: limited perspectives
- West-East: some perspectives
 - Cooperation with Latvian partners – feeder tariffs
 - Cooperation between ports and terminals – to bring large ships from far-East (China) to the region.

Cooperation and clustering perspectives:

- North-South: YES
- South-North: YES

But it is mainly related to the developments of Rail Baltics.

Cooperation and clustering perspectives:

- Passenger traffic: BIG PERSPECTIVES especially in cruise shipping business, e.g. "*Turnaround*" idea for Asian tourists, etc.
- Common negotiating position with the EU regulations: DEFINITELY
- Promoting of common maritime transport corridor: ?

More cooperation perspectives in related activities:

- Synchronisation of the operating conditions
- Maritime technology development
 - Maritime and port related technology (e.g. environmental)
 - Navigation systems
 - ICT systems
- Maritime education
- Environmental protection

Conclusion:

- Cooperation perspectives in SOME business directions
- Possible objective: not Central-Baltic Sea Maritime cluster, but **creation of cooperation networks by special activities.**

Thank you!

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