



better marina
management

project-marriage.net

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REPORT

Workshop on marina network development in PPP Dom Zdrojowy 2, Sopot / Poland 4 June 2013

Agenda:

Time	Topic	Responsible / speaker
Welcome and introduction		
09:30	Welcome by the host	The Association of Sea Cities and Municipalities (ZMIGM)
	Introduction to the MARRIAGE project and the agenda of the day	Jens Masuch / PLANCO Consulting GmbH
Closing gaps in the marina network with public and private funding – recent examples and approaches from Poland, Lithuania and Germany		
09:45	The new island marina at the Sopot pier: Financing, construction process, experiences after one year of operation	Representative of Sopot marina
10:15	Closing the network gap at the outer shore of Darß / Zingst peninsulas in Mecklenburg-Vorpommern / DE: Initiatives and lessons learnt over the last two decades	Björn Gabler / PLANCO Consulting GmbH
10:45	<i>Coffee break</i>	
11:15	Public funding schemes for the construction and maintenance of marinas in Pomorskie region in the period 2013-2020 – example of Pętla Żuławska	Zbigniew Ptak / Marshal Office of Pomorskie Voivodship
Public-private-partnership as instrument for the development, operation and maintenance of marinas along the "South Coast Baltic"		
11:45	Public-private-partnerships for marina construction and operation: Is there potential in Poland?	Bogdan Ołdakowski / Actia Forum
12:15	The public-private operating model for the new marina in Sventoji / LT: A pilot concept to be elaborated within the MARRIAGE project	Leila Sujeta / Klaipėda State Seaport Authority
12:45	<i>Lunch break</i>	

Time	Topic	Responsible / speaker
14:00	Under which conditions are public-private partnerships attractive for a private marina operator?	Till & Hans Jaich / im-jaich
14:30	Opportunities and limits of PPP for marina development & operation along the "South Coast Baltic" <i>Discussion round</i>	Moderation: Grzegorz Walczukiewicz / ZMIGM, Jens Masuch / PLANCO Consulting GmbH
15:30	<i>Coffee break</i>	
Further studies and workshops within the MARRIAGE project		
16:00	The MARRIAGE study on practices and examples of PPP in marina development & operation: Scope, work schedule, expected results	Paul Palmer / PLANCO Consulting GmbH
16:15	Profitable operations as the key for attractive and viable marinas: Training opportunities within the MARRIAGE project	Marcin Forkiewicz / Gdańsk University of Technology
Visit of the island marina in Sopot		
16:30	Joint walk over the pier to the marina in Sopot Further explanations on construction and first operating experiences "on the spot"	Błażej Kucharski / Municipality of Sopot
18:00	End of study tour	

Presentations

All presentation from the workshop (partly in English, partly in Polish) can be found at the MARRIAGE project website www.marriage-project.net.

Conclusions and findings from the presentations and discussions

- **Błażej Kucharski (Municipality of Sopot / PL)** presents the **new island marina in Sopot / PL**.
 - The marina is not only the first example of such type of leisure boat harbour in the Baltic Sea, but also the rare case of an existing private-public partnership for marina operation in Poland.
 - The Marina Sopot was constructed as extension of the existing wooden pier. It has 103 berths and was opened in 2012, after three years of building time. The construction costs amounted to 71 million PLN (approx. 15 million EUR). 25 million PLN were contributed by the municipality. The rest was funded by EU Structural Funds.
 - 60-90% of the marina's customers are resident boaters, mainly from Poland. Besides, it serves guest boaters, both Polish ones and international ones (e.g. from DE / GB / SE). Most of them stay for 2-3 hours, only few overnight. In summer, the marina is occupied by about 70% so far.
 - The municipality owns the marina, but outsourced its management and operation. These tasks have been delegated to the external operator of pier / molo, which earns mainly from entrance fees during summer time. It has subcontracted a Swedish company (Promarina) for operating the marina. Other companies run the services (e.g. restaurant) on the pier.
 - All together 21 jobs were created with the marina, from which 3 persons work directly in the marina office.
 - Sopot Marina is the only one in Poland that needs no subsidies from the municipality for its daily business, thanks to its operating model. Still, the municipality sees potentials for improvements on the side of the private partners. There is an impression that they could be more active and may thus create even more income and quality.
 - From the municipality's perspective, the marina is most important as additional attraction for Sopot and its pier. Sopot has approx. 2 million guests per year and counts about 900.000 visitors of the pier per year.
 - Further information about Sopot Marina can be found on www.sopot-marina.pl/english
- **Björn Gabler (PLANCO Consulting GmbH / DE)** presents attempts and efforts that aimed at closing a major marina network gaps at the German outer shore, by constructing **a new marina on the Fischland / Darß / Zingst peninsulas**.
 - The general economic benefits of closing the network gaps are very high as this would attract more boaters from the western Baltic Sea to sail eastwards. Furthermore, the safety for boaters would be significantly improved.

- In the last 20 years there have been several concepts and attempts to close the network gap and to build a new marina that could not be realised. The most recent attempt was to build an island marina in Zingst. However, after extensive preparations (incl. feasibility studies and financing concepts involving also private parties), the Federal State Government stopped the project once again due to the high costs.
- Any kind of marina at the Fischland / Darß / Zingst peninsulas would need public financing / support for the construction, as the investment costs are immense. Also an island marina would be expensive (approx. 30-35 Million EUR). There is no pier available that could be used as a basis as it was the case in Sopot.
- Even a financially self-sustaining operation and maintenance may not be reached by operating the island marina in Zingst alone. However, the elaborated feasibility study shows that it may be possible by allowing the operator to create and run other tourism offers in addition that can generate much higher revenues than a marina (e.g. a hotel).
- With "embedding" the marina in Zingst into further tourism offers, it may have been realistic to attract a private operator and private capital as described. The project, therefore, did not fail because of expected lack of interest from the private side in operating the marina. It was cancelled because the public side could not agree on initially financing the infrastructure, despite obvious public benefits.
- **Zbigniew Ptak (Marshal Office of Pomorskie Voivodship / PL)** gives an overview on the **Pętla Żuławska project** in the Vistula Delta.
 - The project aims in further developing the water tourism on the inland waterways surrounding Gdańsk and in the Vistula Delta. It established a network of smaller marinas that mainly targets guest boaters.
 - The construction of the marinas was publically financed. All the harbours of the network were built and are owned by municipalities. 14 municipalities conjointly applied for EU structural funds co-financing and realised their investments simultaneously in the last years. Further extensions are considered.
 - The Marshal Office initiated the project and supplied it with EU Structural Funds from the regional operational programme. The maintenance and operation of the network and its marinas, however, will be the sole responsibility of the participating municipalities.
 - After finishing the construction, the involved municipalities have established a joint operating structure for the Pętla Żuławska marina network on 28 May 2013 (purpose company „Pętla Żuławska Sp. z.o.o.“, owned by the municipalities).
 - Pętla Żuławska Sp. z.o.o. is responsible for the operation of the marina and should use the revenues from the marina operation for the maintenance of the infrastructure. It is planned to involve private parties into the operation of the single marinas or the marina network in the future. How this can be done will be further elaborated in the upcoming months

- **Bogdan Ołdakowski** (Actia Forum / PL) elaborates on **potentials for public-private-partnerships** for marina construction and operation **in Poland**.
 - A study on small ports in Pomorskie region revealed that their economic potentials are rather limited when it comes to cargo handling. The biggest prospects are generally to be found in tourism and the marina business.
 - In many places, these potentials are already being used or currently being developed by constructing leisure boat facilities (e.g. Pętla Żuławska, Szlak Żeglarski). Marina projects are exclusively financed publically and with the help of EU Structural Funds so far, making use of extensive support schemes that are currently available for port infrastructure.
 - Misuse and doubtful projects in the 1990s deteriorated the reputation of the PPP concept in Poland. This impression persists even after the new legal act on PPP was issued in 2009. The concept has therefore still a negative overtone in Poland, especially for the public side.
 - In recent time, however, there are signs that PPPs see a renaissance and gain new trust in Poland. A new audit report on PPPs comes to very positive evaluation in most of the cases. Failures, which are still found but rare, are caused mainly by insufficient preparations of the arrangements and contracts by the public side.
 - The current PPPs in Poland (e.g. reconstruction of the railway station in Sopot) are mostly motivated for acquiring private capital. Quality aspects, i.e. getting access to skills for the realisation of investments or operation of infrastructure and services, are not in the centre of interest so far.
 - In the marina business, there are only few examples of PPPs in Poland so far. They exclusively involve the operation of marinas (e.g. Sopot), whereas no example of PPP for the construction of marina infrastructure is known.
- **Leila Sujeta (Klaipėda State Seaport Authority / LT)** presents scope and aims of the **public-private operating model** for the new marina in **Šventoji / LT**
 - The new marina and seaside resort in Šventoji is developed by Klaipėda State Seaport Authority, which is the owner of the territory. The construction of the port infrastructure (e.g. breakwaters, basins incl. dredging) will be financed from public sources. Private parties shall be involved in the construction of the suprastructure (e.g. apartments) and operation of tourist services (incl. marina).
 - The public-private operating model for the marina in Šventoji is a pilot action within the MARRIAGE project. It is expected to explore the possibilities and re-define the scope of making use of PPPs for the marina construction and operation in Lithuania, perhaps also exemplary for the New Member States.
 - Klaipėda State Seaport Authority has subcontracted an expert to create a development and operation model for the Šventoji port, which should involve private parties. The study will not only outline options for Klaipėda State Seaport authority to proceed with the development of Šventoji, but also provide ground to attract private investors / operators and carry out respective marketing actions. The concept is currently being elaborated.

- The ambition with the concept is to question all parameters of the project so that it can be attractive for public parties to get involved. This may involve also to question e.g. the demarcation between publically financed infrastructure and privately financed suprastructure or the relevant legal framework.
- The concept is being elaborated by spring 2013. The outcome of the study will be presented at the 4th MARRIAGE all-partner meeting in Zachodniopomorskie / PL in May 2014.
- **Till & Hans Jaich (im-jaich / DE)** reflect on the question, what can make **public-private partnerships** attractive from the **perspective of a private marina operator**.
 - Cooperation with the public side is a natural part of the marina business. Even if marina operators build the port and the infrastructure on their own, the public side is always involved in the process of developing and operating the marina (e.g. in the form of land use planning, building permits, etc.).
 - From the private perspective, a wide range of motivations can lead to partnerships and institutionalised cooperation with the municipality / public side. These can be found in both hard, monetary aspects (e.g. sharing investment costs, better access to public subsidies) and soft aspects (e.g. enhancing acceptance of the local population for the marina project).
 - The main risks / cons of PPPs for private operators are political interference and longer decision making processes as well as possibly limited influence on price policy and the danger that the infrastructure development does not follow market requirements. Those factors may hamper the operations from the commercial point of view.
 - The company im-jaich operates currently 9 marinas in Germany. All of them involve some kind and degree of partnership with the public side. The arrangements, however, are very heterogeneous. They are always tailored towards the specific locations and conditions and often the result of the specific history of the individual marina.
 - The main differences are to be found concerning share of income / turnover between the public and private side as well as the ownership of land, water and marina infrastructure. Also the time of the involvement of im-jaich into the development and operation was case-specific. It reaches from participating already in the initial planning stage (e.g. Bremerhaven) to taking over a marina that has been publically operated for many years (e.g. Langballigau).
 - There is no universal model that would be preferred by im-jaich. On the contrary, the differentiation of PPP arrangements complies with the interested of the company. The individual tailoring is an important element of achieving profitable operations in a specific location and situation.
 - When considering a PPP arrangement and getting involved into the development and operation of a marina, im-jaich does always investigate the wider context and possibility.

- The **final discussion round** lead to the following **further conclusions** regarding Public-Private-Partnership as instrument for the development, operation and maintenance of marinas along the "South Coast Baltic":
 - Public-Private-Partnerships are a fact in the marina business along the "South Coast Baltic". This applies not only for Germany. Examples can be found also in Poland and Lithuania.
 - The involvement of private parties focuses mainly on the operation of marinas so far. The motivation of the public side is primarily to get access to operating skills in this context. The mobilization of private capital for the construction of leisure boat harbors has been rather the exception until today.
 - Currently, the municipalities carry the risks and burdens of often unprofitable and thus costly marinas alone, in many cases. They would therefore be the main beneficiaries of more private involvement into the marina development and operation and natural driving forces for this process.
 - There exist only few commercially interesting marina locations along the "South Coast Baltic". Private operators seeking for new business opportunities are rare. The impetus for more private involvement, therefore, has to come from the public side / the municipalities.
 - When planning to establish (initiative from public side) PPP in the marina business it is recommended to plan carefully and to involve the private partners as early as possible. Furthermore fact-based information on the current market situation should be provided and taken into account when planning the marina project. This would allow the private side to draw own conclusions (which they would do anyway) and thus to enhance trust / transparency and prospects to attract them.
 - The future prospects of PPPs / more private involvement into the development and operation of marinas can be appraised as follows, in the light of the discussions during the workshop:
 - Limited with regard to mobilizing private capital for constructing marinas. The expected turnover is too low because of the short season. Under the given market conditions (especially: short season, thus rather low turnover of marinas), this seems to be possible only when an attractive "package" is created, which allows for further (landside) investments and thus revenues, like e.g. hotels or apartments. But even that is doubtful.
 - Capable of development in terms of mobilizing skills and knowledge for the development and construction of marinas. Examples from Germany show that this is possible. The potential benefit of the municipality is a market driven infrastructure development. The challenge, however, seems to find ways to involve private marina operator at this stage that is in line with legal provisions and still attractive for operators.
 - On a good way with regard to involving private operators into the operation of marinas, both in terms of contributing operational skills and capital for maintaining the infrastructure. There are many successful examples to be

found in Germany. Sopot, Pełta Żuławska or Šventoji show that the concept has already arrived in Poland and Lithuania, too. Crucial for the success of such arrangement for the public side seems to be finding a tailored concept that considers the economic potentials and specifics of the marina in a realistic way.

- The term "Public-Private-Partnership", however, may not be helpful to motivate municipalities to consider private involvement into the development and operation of marinas along the "South Coast Baltic" and to further promote the concept:
 - In Poland, the term has still a negative overtone resulting from bad experiences in the transformation phase. It creates fear rather than interest on the public side.
 - Furthermore, legal definitions and common sense relate it rather to the mobilisation of private capital for realising infrastructure investments. Its application in the marina business may focus mainly on acquiring private knowledge and skills as well as in most cases on the operation of the harbours, it may be too narrow or even misleading.

Outlook: Further studies and workshops within the MARRIAGE project

- The workshop in Sopot was the second out of three international MARRIAGE events dealing with marina network consolidation / PPPs for marina development & operation along the "South Coast Baltic". The last one take place in Zachodniopomorskie / PL in May 2014. It includes e.g. reports from pilot actions conducted within the MARRIAGE project (e.g. PPP operating model for Šventoji). Interested parties from outside the project partnership are very welcome to join.
- The topics of the workshop in Sopot will be further investigated by an expert study on practices and examples of PPP on marina development and operation that is also a part of the MARRIAGE project. The expertise is currently being conducted by PLANCO Consulting GmbH. It will be published at the project website www.marriage-project.net in autumn 2013.
- The MARRIAGE partners in Pomorskie region (ZMIGM and Gdańsk University of Technology) will offer a series of seminars and workshops on marina operation and management from autumn 2013. The events address marina operators as well as municipal representatives who are responsible for the marinas. They are conducted in Polish language. Besides the concrete daily business of operating a marina, also operating models will be discussed during the workshops.
- Similar workshops and seminars will also be offered in Zachodniopomorskie / PL and Klaipeda Region / LT from autumn 2013.
- The dates of all these regional events will soon be announced on www.marriage-project.net.

List of Participants:

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Projekt MARRIAGE
Rozwój sieci przystaniowej w ramach partnerstwa publiczno-
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Wizyta studyjna w marinie sopockiej.
Sopot, 4 czerwca 2013
Dom Zdrojowy



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