

The race to 2020

Shanghai has been set the target of becoming an international shipping hub by 2020 – but growth alone won't get it there. **Bouko de Groot** reports

The city of Shanghai and its taskmasters in Beijing have grand plans for it to become a centre for shipping and ship finance by 2020. Unburdened by provincial capital status, the city-province is able to focus all its efforts on this mandate.

"Shanghai is a hub port for China, particularly the Yangtze delta and Zhejiang and Jiangsu provinces, where there is a heavy concentration of manufacturers producing goods for export," Yuping Bi, general manager ships agency and marine logistics of WSS China, told *Fairplay*. "From a regional perspective Shanghai has also benefited from the meteoric rise of intra-Asia trade, with China buying more goods from its neighbours in Asia and exporting more manufactured goods to regional markets," Bi continued. It's also one of the region's biggest shipbuilding centres.

In other words, the city is well on its way to become a regional shipping hub. Globally, it's the top port in terms of total cargo throughput and the world's busiest container shipping port. "Shanghai's container traffic was driven initially by demand for manufactured goods in the US and Europe," said Bi.

Adding to that now is a growing domestic demand for imported goods. "Shanghai is already home to several hundred international shipping and shipping-

related companies. The city is also the commercial capital of China and home to many trading companies who need shipping services."

Andrew Chiang, regional head of shipping at DnB Nor, concurred that "Shanghai is developing into a container shipping hub: all big parties involved are here". However, other segments are not tied so much to Shanghai.

But to be an industry-wide success, more is needed, especially with major competitors in the region. "Sure, there is a push from the Shanghai and Beijing governments to set up shop in Shanghai, but in other policies, there's still some way to go," explained Chiang. For foreign companies, Shanghai's policies aren't as favourable as those in Singapore, for example. "Just when Shanghai catches up will depend on these policies," said Chiang.

Bi feels there are some areas that need improvement in terms of automation, infrastructure and reducing bureaucratic procedures. On the other hand, there's a lot of government and private investment needed to make those improvements a reality. "It's



'No other city in China can rival Shanghai'

[Image: Shutterstock]

very hard to compare Shanghai with Singapore as each has its advantages. But what Shanghai needs to improve most is probably its legal, banking and finance sectors in order to better serve the maritime industry," Bi said. Experience is also something that counts. "Singapore has been developing as a hub for more than 40 years, while Shanghai's rise has been more recent," he pointed out.

But things can change rapidly. "The speed of development driven by China's rise as a global manufacturing centre meant that Shanghai has already overtaken Singapore as far as container throughput volumes are concerned," he added. Shanghai International Port Group (SIPG) expects these volumes to keep growing for around 10%/year for the foreseeable future.

Facing labour shortages in the south – and lured by tax incentives – more manufacturers are opening plants along the Yangtze, which will "continue to be the main region driving China's economic expansion", according to SIPG president Xuyuan Chen. And all that cargo will come downriver to Shanghai.

But this enthusiasm creates problems. Shanghai's mayor, Zheng Han, said last week that his city created almost 400,000 jobs during 1H11. The need to fill so many new positions increases competition among employers. As a result, salaries are constantly rising.

According to Han, the average disposable income of his residents jumped 12.4% on average from January to June. For many white collar jobs, the increase was much greater, and that pushes them perhaps too close to levels in established centres such as Singapore – locations that offer the extra benefit of more experienced employees, something the relatively young white collar work force in Shanghai struggles to provide. Thus Shanghai has one of the world's highest employment turnover rates, with young people constantly hopping from job to job.

Inflation is another problem. In 1H11, food prices were up 10.4% year-on-year. Electricity, rent, gas and water also continue to climb. These problems have already convinced many manufacturers to leave Shanghai and move west. Like their southern counterparts, they find a cheaper spot somewhere along the Yangtze. But in combination with the city's decision to meet import/export growth by moving its international container traffic to Yangshan Deepwater port, an expensive 40km further away from the inland factories, this move west has awoken the cities upriver.

Large and growing container terminals have been built close to Shanghai, bypassing the mega port. Finally, there is the trend that already large state-owned enterprises – in shipping, banking, mining or steel-making – are moving closer to one another again. What started out as a cost-saving measure to combat the global financial crisis is continuing to eat away at the level playing field that Shanghai must have to attract global hub status.

Nevertheless, if there is a city that can pull off the transformation needed to become a global shipping hub, it is Shanghai. As Peter Murray, senior partner with Ince Law, puts it: "No other city in China can rival Shanghai in its international profile." ■

15M
teu handled by
Shanghai ports
in 1H11

Shanghai, 1H11

Population:
23M
(8.3M households)

GDP:	Rmb916Bn (\$143Bn)	▲ 8.5%	(vs 1H10)
primary	Rmb4Bn	▲ 7.3%	
secondary	Rmb383Bn	▲ 8.0%	
tertiary	Rmb530Bn	▲ 8.8%	
Imports:	\$110Bn	▲ 24.2%	
Exports:	\$98Bn	▲ 17.6%	
Retail sales:	Rmb326Bn (\$51Bn)	▲ 11.5%	
FDI:	Rmb198Bn (\$31Bn)	▼ 5.8%	
Port:	15.3M teu	▲ 10.5%	
	236M tonnes	▲ 11.7%	

[Source: Shanghai Municipal Statistics Bureau]

Shanghai's ship finance sector focuses on China

Big banking and big shipping exist side by side in China's most populous city. But their business is still focused on the domestic market

Two years ago, Beijing decided that Shanghai should become a global centre for finance and for shipping during the next decade. The creation of the logical response to those demands – a global centre for ship financing – is on the cards but is not yet a reality.

According to the Shanghai Finance Association, Shanghai currently accounts for less than 1% of global shipping finance. Shanghai's banks – all separate entities bearing national brand names – are held back by limitations of both people and policy.

Like most industries in China (and indeed global shipping), the city's banks have difficulty finding and retaining experts. Yet such experts are needed for the city to grow into an internationally competitive centre. Unfortunately, most potential employees are too busy job-hopping to build real expertise; those who do tend

to eventually move to Singapore's banks to enjoy that city's low-tax climate.

Complicating matters for ship finance are the close relations between big banks, yards, owners and Beijing. China's ExIm Bank, the biggest ship financier, is strictly a policy bank. Other state-owned banks are also very much focused on domestic affairs – even from their overseas offices.

Thanks to the Shanghai Stock Exchange, public funds are an alternative to bank finance. But here too, the 'international' label is many years away, with work still continuing to allow foreign companies access.

Another possibility, the Shanghai Shipping Industry Fund, was established earlier this year. "The goal is to raise at least Rmb3.5Bn during three years," Huimin Ma, deputy general manager of China Shipping Investment, told *Fairplay*. His company – part of Shanghai-based and listed China Shipping Container Lines – is one of four shareholders in the fund; the others are Shanghai-owned.

"I don't think the fund will do too much this year," said Ma. "We hope that by the end of 2011 the executive team and the 30 or so staff have been found

City yards lead China's innovation drive

Shanghai's high-tech headstart gives its yards an edge over growing domestic competition

Whether by luck or design, Shanghai had finished upgrading its yards when the global financial crisis hit. Its major yards have moved out of the city onto islands in the mouth of the Yangtze River. The move started just before the crisis while pockets were still deep. This allowed existing yards to completely update while still churning out vessels from their old locations. Most capacity belongs to the China State Shipbuilding Corporation (CSSC), which has pushed hard to develop its own designs. This has led to specialisation among its members, setting them apart from other Chinese yards.

Waigaoqiao Shipbuilding, for example, stepped into the

offshore sector. Meanwhile, Hudong-Zhonghua Shipbuilding keeps building LNG carriers and recently delivered China's biggest container carrier yet – an 8,888teu design (eight is a lucky number in China) which was independently developed according to the yard. Other yards too found their niche.

Interestingly, Shanghai's traditional builders left some niches to be filled by upstart Zhenhua Heavy Industries (ZPMC). This global market leader in port cranes has always put a large part of its budget into R&D. Experience gained from designing big cranes and the vessels to transport them was first translated into floating cranes. ZPMC now also builds dredgers and offshore pipe-laying vessels – a diversifying move.

Just a month ago it started work on the *Zhenhai 1*, the company's first jack-up rig. ZPMC president Xuezheng Kang fully understands his company lacks some experience in the field. But he wants it to push further into the high-end segments, to be able to "keep dominating the market". Kang therefore has made the success of *Zhenhai 1*, which should be ready by 2013, ZPMC's top priority.

\$1Bn

foreign LNG vessel orders from China

[Photo: Shutterstock]

1%

Shanghai's share
of global
ship financing

and placed." He expects the fund will then try to convince Shanghai-based Jiangnan Heavy Industry – part of the China State Shipbuilding Corporation (CSSC) – and Shanghai International Port Group (SIPG) to join as limited partners.

When all that is in place, the fund will start to invest, with a focus on local, state-owned projects, with Shanghai-based investors for Shanghai projects – doing little to promote the city's status as an international finance centre. Guoqing Chen, general manager of the marine department of China Mer-

chants Insurance Brokers, agreed. "It will benefit Chinese shipowners, because with such a formal and well-organised financing channel, their investments will be steady and orderly," he told *Fairplay*. As a bonus, Chen expects this to help improve the quality of vessels.

Shanghai will no doubt be the national ship finance centre in 2020, but with all the focus on the domestic and local market, it's up to foreign banks to support the city's more ambitious goals – although these too mainly focus on domestic opportunities. ■

Promising though these yards seem, their designs have a long way to go before they are able to compete with those of Japan and South Korea. Even as Shanghai's (and China's) biggest container carrier was delivered, South Korea was working out the details for the first 18,000teu ship – twice the size.

Nevertheless, foreign interest is beginning to increase. With six domestic vessels already on its books, Hudong Zhonghua recently got its first foreign order for its LNG carriers, from a Japanese owner no less. Mitsui OSK Lines (MOL) will use the four 172,000m³ in its Chinese subsidiary and joint venture, to carry LNG from Australia to China. Order value is about \$1Bn, vindicating Hudong Zhonghua's earlier decision to specialise. Delivery is planned between 2014 and 2016.

Beijing's wish to have half its energy imports transported in Chinese vessels was probably an important reason for MOL's choice. However, this first order from abroad may be a sign of things to come this decade, with Shanghai leading China's push to high-tech. ■

Early movers take the lead

China's yards face tough times. To survive, most do what they have always done best: compete on price.

But nowadays, most of the competition is Chinese. As a result, margins are getting thinner. Some yards started to specialise in time; others are now trying to escape the vicious cycle – into wind power, big constructions, repair and recycling.

Unfortunately, all of these already have successful and experienced players. Some of the biggest are in or near Shanghai, with ZPMC and Changjiang Ship Recycling leaders in their sectors.

The downside of the mass migration to the promised lands of repair and recycling is that competition there gets hotter as well. Already, margins of repair yards are down to almost unprofitable levels. Recycling may see a similar trend soon, with several large yards under construction at present, without any orders to fill them.

Or, as one European NGO-president at the recent Asia Ship Recycling Summit in Shanghai told *Fairplay*: "Existing recycling yards already have over-capacity, so how do the new ones like Dalian ever hope to grab enough share to make a profit and earn back their investment?"

While the other yards keep chasing each other, the real advantage will be with the early movers. Here too Shanghai is leading.

SHANGHAI

Foreign owners need convincing

State-owned shipping concerns are happy to repeat the official mantras about Shanghai as a global hub. But what do international owners make of the claim?

China's state-owned shipping behemoths – such as Cosco Container Lines (COSCON), China Shipping Container Lines, China Shipping Development and China Merchants Shipping – are all headquartered in Shanghai; its location and number-one status make it the logical choice. And it comes as no surprise that these companies – acquiring, merging and co-operating in all directions – fully support Beijing's drive for the city to become a global shipping hub.

But it's not up to them to achieve that target. Foreign owners also need to be convinced Shanghai is the place to be, and it seems they are somewhat more sceptical. "The government would like it to be the hub of Asia or the world, but it still has a long way to go," Paal Utvik, regional manager Asia of Grieg Shipping, told *Fairplay*.

For one, an international shipping hub needs a truly international community and Shanghai isn't there yet. "I see that a lot of expats find it difficult to stay in Shanghai for a longer term with their family," said Utvik. He feels Singapore is a more liveable city, especially from the perspective of those with families. "Shanghai is for a younger crowd." Other issues are the language barrier and the high income tax compared with Singapore. Transparency and accountability from the government are also important.

From a company perspective there are also problems. "Among foreign owners, the feeling is that the government gives Chinese owners an advantage," said Utvik. He is convinced, however, that Beijing is sincere in its wish to level the playing field in Shanghai – if only because it cannot otherwise hope to achieve its aspirations. "Basically, if you want things to be international, they need to be equal, but it still isn't there: domestic owners still have an advantage." He believes Beijing's efforts to improve these shortcomings will ultimately bear fruit. "It may take a few rounds before they get it right, perhaps another decade."

According to Utvik, the 'white collar' section of the industry will certainly remain in Singapore, but, in the



Paal Utvik, regional manager (Asia) of Grieg Shipping
[Photo: Bouko de Groot]

long term, the physical sector is likely to move to Shanghai and China. Cities like Tianjin, Qingdao and Dalian will provide Shanghai with stiff competition as a port, "but as an international shipping hub? Not at all," he added.

Regionally, the three will certainly be a force to reckon with. Hong Kong might be another possible contender, though it is struggling with space restrictions. "A great city from the perspective of international living, but China decides," Utvik said. If the government chooses Shanghai to become the hub, then Hong Kong must simply fall in step. "Hong Kong doesn't have that freedom anymore."

But Beijing's decision alone is not enough to convince foreign owners abroad to come to Shanghai. "There are many locations to register your headquarters where all the elements needed are already in place: fair trade and competition, language, tax and living," said Utvik.

He stressed again that international owners must receive equal treatment. "If you're a Chinese owner in Shanghai, you get easier access to money and cargo, get a different legal treatment and so on. If you try to create an international shipping centre with that going on, it won't happen." Of course, a lot of this 'inequality' is unofficial – it comes from the tight local networks that Chinese owners, bankers and others are part of. But as long as these networks prevail, hub status is likely to remain elusive, he said.

Finally, perhaps the message itself must be improved, noted Utvik. "I'm still unclear if Shanghai wants to be the shipping hub of the world, or the shipping hub of Asia." ■

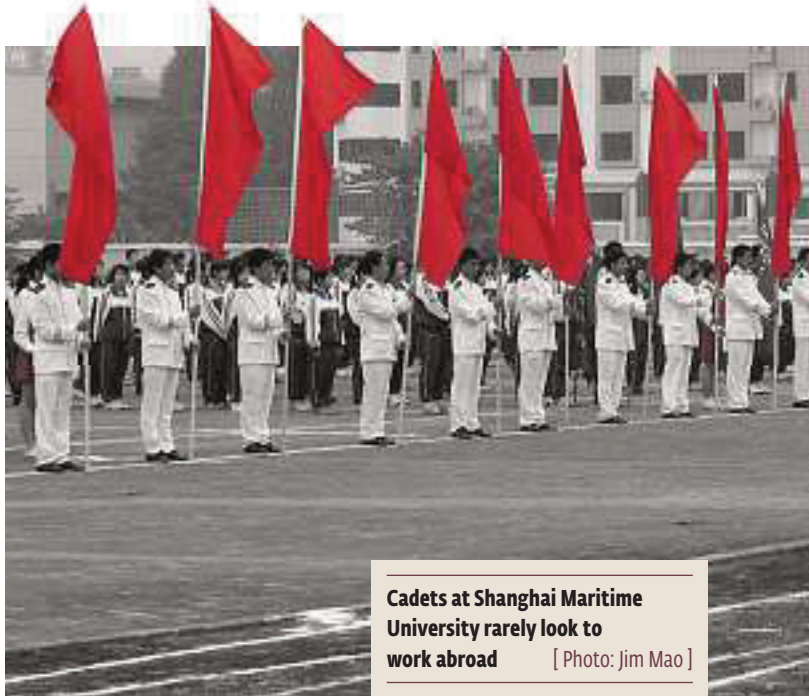
Beijing's decision alone is not enough to convince foreign owners



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Domestic opportunities keep China's seafarers at home



Cadets at Shanghai Maritime University rarely look to work abroad [Photo: Jim Mao]

Foreign opportunities keep knocking at their door – but Shanghai's young maritime graduates prefer (or need) to stay close to home

Shanghai's Maritime University is actually a generalist university, albeit with a focus on the shipping industry. At its Merchant Marine Academy, 120 professors, lecturers and engineers educate around 2,000 much-needed new seagoing officers. Also present in Shanghai is the World Maritime University, which delivers a programme in collaboration with Shanghai Maritime University.

But despite worldwide demand for seafarers, most graduates from the academy will end up working on Chinese vessels. "China has seen the greatest growth rate of owners globally, this greatly increased the demand for crew," Liqian Li, deputy general manager of the crew trainer China Ocean Maritime Centre, told the China Maritime Service Network. Apart from expansion by existing owners, many new vessels were bought by coal, power and steel companies forming their own fleets.

At the same time, all these companies need expertise

on land. So after only a few years at sea, officers often exchange their ships for a desk. These two factors have combined to create a serious shortage of officers in China. More intensive training and large-scale use of interns, in co-operation with operators, are the most important tools Li uses to combat the problem. He estimated it may take at least five years before the shortage becomes manageable.

By that time China may once again take on the Philippines, China's biggest competitor, according to Li. However, the trend of going ashore after only a few years at sea looks set to persist, with other branches of China's growing maritime industry eager to benefit from these officers' experience. As a result, only 4% of expatriate seafarers are from China – meaning it remains unlikely that China will be able to compete with its southeastern neighbour.

Language barrier

Another factor keeping numbers down is the language barrier. Insufficient English-language proficiency means many officers are precluded from joining foreign employers. For crew positions with lower educational demands, language is often an absolute barrier to going abroad.

Not that it really matters for the Chinese seafarers involved. Thanks to the current shortages, they can almost always be assured of jobs in their own country.

However, this has meant that addressing the language issue is not as high a priority as it should be. Meanwhile, initiatives to tackle the problem by foreign companies are often self-defeating – training Chinese seafarers in-house often results in those employees leaving the company. One foreign owner told *Fairplay*: "The moment they finish their training, they get a better offer and join a Chinese employer."

Those that find their way into foreign employment via different routes face another problem: while working abroad – usually through Chinese agencies – they become stuck in a kind of international limbo. Many agencies take advantage of this, demanding extra commission of half or more of the officer's net pay. A job with a national operator often seems preferable.

Despite efforts to address the issues, the combination of domestic shortage and the language barrier means that Chinese crews can't be counted on to solve the international crew shortage any time soon. ■

4%
of expat seafarers
are from China

insight

Hub dreams – what are the odds?

Will Shanghai be the international shipping hub Beijing wants it to be by 2020? **Bouko de Groot** reviews the challenges the city faces

It's certainly true that Beijing has a record of getting things done. But transforming Shanghai into a global shipping hub will take a lot more than pouring concrete and laying down steel. And unlike the other 'can-do' projects, this one isn't entirely domestic. It needs international commitment, on a very large scale.

It's easy to itemise the things working in Shanghai's favour: its geographical position, its status as business capital of China and the importance it already enjoys in the shipping industry.

So what are the obstacles the city may encounter in trying to grow from a regional to a global hub?

The challenges, broadly, are manpower, internationalisation and nationalism.

First, there now is a serious

shortage of local expertise and talent. The few people that would qualify for this description have often been schooled abroad.

Even if somehow this shortage can be resolved, it seems naïve to expect that, with other markets emerging during this decade, all the required local talent will remain in China.

Second, what incentives are there for foreign companies to come and settle in Shanghai as their global shipping lookout? Of course, some already have, but most treat Shanghai as their headquarters for Northeast Asia – at best.

In part this is because Shanghai still isn't an international city. The percentage of expats is much lower than in cities such as New York or Singapore. 'International

living' – in name, not in quality – is very expensive in Shanghai and getting more so – the average international school is more expensive than in Switzerland for example.

From a business perspective, foreign companies are in Shanghai because of their business with China, and important though international trade with the city is, it's not especially diverse.

Third, national political interests always get first priority in China. Business and politics are one and the same. The fall-out for Norwegian businesses from the Nobel Prize affair is but one example. Tight political control of the renminbi is another.

A politically-controlled, stifling bureaucracy doesn't help either. Having to wait for hours on the runway at Shanghai airport because of a

military flight near Beijing, might be forgiven if it happened once, but these days it's almost routine, with a seven-hour wait being the current record so far. All the cordial handshakes and promises of business are then easily forgotten.

It also shouldn't be forgotten that basically all Chinese corporations are state-owned. That adds another dimension to international business in Shanghai, especially when that international business takes a blow, as it did during the global financial crisis.

Turning Shanghai into a global hub is certainly possible. For it to happen, the political decision-makers involved first need to create a level playing field. On it, players must never be judged on their nationality and must be allowed to play by international rules that are not overturned by local exceptionalism. In other words, success depends completely on the decision-makers' ability to let go, step back and enjoy the game. **E**

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NEAL DE ROCHE

Nothing is impossible

Neal de Roche, Wilhelmsen Ships Service's man in Shanghai, told Bouko de Groot that emotional intelligence, a good support base and an appetite for adventure have been key to his success

Three years ago, Neal de Roche was invited to Shanghai to lead Wilhelmsen Ships Service in Northeast Asia. It has ended up being the experience of a lifetime.

"In people's perception, China is extremely different," he explained to *Fairplay*. According to de Roche, the secret to success in China is to create the right support base for the people who work for you. "If you make them believe in what they do, the term 'nothing is impossible' really becomes reality. They push for 200% here."

Like every other member of his family, de Roche was raised in a small fishing village in South Africa – though he is the only member who did not end up working in commercial fishing. Having spent much of his youth around the water, he went to sea in his teens and worked as a seafarer for six years. "I was second and third officer for several companies, on all types of vessels," he said. Then Sturrock asked him to come ashore as it wanted an experienced seaman for its land operations. His family supported this career

change because "my father thought we should all learn a trade besides fishing".

So instead of returning to his home village, he remained in commercial shipping. His role with Sturrock was followed by a job with Barwil, a Wilhelmsen-owned company. De Roche then moved to Abu Dhabi, then back to South Africa to oversee WWS in southern and east Africa. It was during that stint that the Shanghai position opened up. "When I told my manager that I was going to Shanghai, he [first] told me that when you go to Northeast Asia, you have to use your emotional intelligence as much as possible in daily scenarios. Secondly, he said you need to create the right support base to win customers and build the required network."

In the spotlight

Neal de Roche

Born: South Africa, 1973

Position: Area director, Northeast Asia, Wilhelmsen Ships Service

Career history:

- Started his maritime experience at the age of 17
- Sailed abroad with Safmarine and Unicorn Lines
- Joined Sturrock Shipping Agency in 1997, then Barwil in 1998
- Was general manager for Barwil Unitor in Abu Dhabi, UAE, from 2004 to 2006. After that he took on the role of regional operations manager
- Became area director for southern and east Africa for Barwil Unitor
- Moved to Shanghai for his current position with WSS in 2008

Education: National diploma in maritime studies; currently studying for a logistics degree

Family: Married with two children



NEAL DE ROCHE

[Photo: Wilhelmsen Ships Service]

De Roche has no doubt that the advice was well founded. "We've collected an amazing team here, one of the best that I've worked with. It's a thrilling experience, on a daily basis."

As area manager, he set up a team of specialists in sales, marketing, finance and customer services. This team works alongside the general managers in de Roche's area in Japan, South Korea, China, Taiwan and Hong Kong. "Our team is very focused. I tell them to look at the solutions not the problems, because it's all about creating the right culture, which in turn creates passion. And we have fun while we're doing it, that's also very important."

There is plenty of proof that this approach works. WSS's Northeast Asia division has hauled in half of the company's global contracts so far this year for its new Ship Agency Re-Defined (SARD) offer. "This new concept was introduced a year ago – it's one of our focus areas for 2011. Among other things, SARD offers owners a single point of contact in the same time zone for all port calls and a single bank account for all transactions. As a result, customers get the efficiency and transparency they want," de Roche said.

To date, WSS has signed about 80 SARD agreements in Northeast Asia, the

equivalent of 7,000 port calls per year. The forerunner was Japan, followed by South Korea and Hong Kong. "Taiwan took off in March. China started last, but we already have set up 10 contracts here, with many more in the pipeline."

De Roche believes that interest from Chinese owners is due to their quest for long-term partners, and SARD "makes them operationally efficient, and creates more value and benefits".

Clients are both private and state-owned companies, although the latter are more challenging to penetrate because of their sheer size.

Overall, de Roche considers that the biggest growth potential for his part of WSS's world network lies in China and Taiwan. "Currently, Japan is our biggest patch when it comes to sales, and has our biggest customer base. South Korea is back up and swinging hard again."

Globally, SARD has had a very good start. "Numerous big customers came to us on their own, through word-of-mouth. I truly believe we will grow in a fast pace over the next two years. You're only seeing the tip of the iceberg at the moment."

Looking further ahead, de Roche is just as positive. "The current trend towards more tonnage on the water is a good

thing for us. We're ambitious, our strength is our global network, through which we serve 2,000 ports. WSS can provide most products and services to a vessel and we will increase that package."

Another focus for de Roche is to expand WSS's operational footprint. "We need to ensure we are where the customer is. Look at China. Back in 2008, we had one agency office in Shanghai. Now we're in Qingdao, Dalian, Ningbo, and soon in Tianjin, Guangzhou and Xiamen. China is providing good opportunities."

To be able to turn these and any other opportunities into success, de Roche stresses the importance of leading by example. "If we managers walk the walk and talk the talk about being passionate, it will work its way down. Because what it really boils down to are motivated people. To truly believe in what you're doing, to be passionate about it – that in itself is contagious." ■

**'To truly believe
in what you're
doing, be
passionate
about it'**

