

**MARE FORUM**

---

AD REPERIENDAM VERITATEM



# The Italian Maritime Cluster and the Port Reform

*19<sup>th</sup> May 2016*

*Umberto Masucci , Vice President Federazione del Mare*

# Federazione del Mare

established in 1994

## 16 member associations

Aidim (**maritime law**)

Ania (**insurance**)

Ancip (**port operation**)

Assonave (**shipbuilding**)

Assoporti (**port administration**)

Assorimorchiatori (**towage**)

Confitarma (**shipping**)

Collegio Capitani (**maritime staff**)

Cetena (**naval research**)

Federagenti (**ship agency**)

Fedepiloti (**port pilotage**)

Federpesca (**fishing**)

Fedespedi (**intern'l freight**)

Inail (**welfare**)

Rina(**certification**)

Ucina (**yachting**)

*strong links with*

**maritime Institutions**

# The European Maritime Cluster

European Network of Maritime Clusters  
www.european-network-of-maritime-clusters.eu





 Allemagne :  
**Bundesministerium für  
 Wirtschaft und Technologie**  
 www.bmwi.de


 Bulgarie :  
**Marine Cluster Bulgaria**  
 www.marinecluster.com


 Danemark :  
**Maritime Development  
 Center of Europe**  
 www.maritimecenter.dk


 Espagne :  
**Cluster Marítimo Español**  
 www.clustermaritimo.es


 Finlande :  
**Aker Arctic**  
 www.akerarctic.fi


 France :  
**Cluster Maritime Français**  
 www.cluster-maritime.fr


 Italie :  
**Federazione del Mare**  
 www.federazione-del-mare.it


 Luxembourg :  
**Cluster Maritime  
 Luxembourgeois**  
 www.cluster-maritime.lu


 Grèce (Observateur)  
**Institute for Development  
 & Evolution**  
 www.otenet.gr


 Norvège :  
**Maritim Forum**  
 www.maritimt-forum.no


 Pays-Bas :  
**Dutch Maritime Network**  
 www.dutch-maritime-net-  
 work.nl


 Pologne :  
**Polish Maritime Network  
 Institute**  
 www.gdansk.uw.gov.pl


 Royaume-Uni :  
**Sea Vision U.K.**  
 www.british-shipping.org


 Suède :  
**Maritime Forum**  
 www.sai.se

- 450 billions euro
- 5 millions employees

## The Italian Maritime Cluster

### 33 billion Euro (2% of the GDP)

- **Shipping** : 11.8 billion (Production Value, PV)
- **Port Logistics and Services**: 5.4 billion
- **Shipbuilding and related manufacturing**: 5.1 billion
- **Yachting**: 2.8 billion (PV, 4.5 billion GDP with downstream)
- **Nautical and cruise tourism**: 2 billion
- **Fishing**: 1.9 billion (PV, 4.8 billion GDP with downstream)
- **Institutional** activities: 4.6 billion (Navy, Coast Guard, Port Authorities, etc.)

## The Italian Maritime Cluster

- **471,000 employees (265,000 upstream)**
- **Production value per employee: 186,000 Euro**  
(shipping 339; shipbuilding 280; yachting 202; port act.s 197)
- **Added value per employee: 68,300 Euro**

## The Italian Maritime Cluster

### Europe leader:

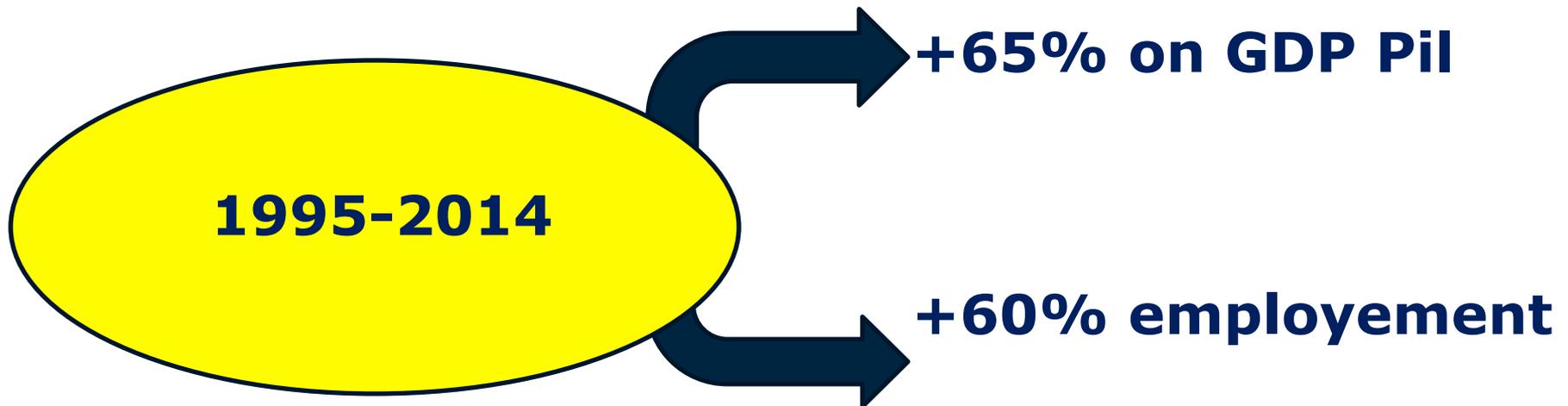
- First place as cruise embarkation and landing country (6.2 million pax; 4,600 landings)
- First country for many years in goods import-export by sea, in 2015 third (210 million tons)

### World leader:

- 1<sup>st</sup> Ro-Ro fleet (250 ships, 5 million GT)
- 3<sup>rd</sup> G20 countries fleet (17 million GT)
- Cruise shipbuilding (Fincantieri)
- Motor-yachts building (Azimut-Benetti)

# Italian Maritime Economy

## A continuous growth in the years



## The Italian Maritime Cluster

### Maritime Intensity Regional Ranking in Italy (All Regions, first six places)

- 1<sup>st</sup>. **Liguria**: first in **port activity** and **yachting**  
second in **shipping** and **shipbuilding**
- 2<sup>nd</sup>. **Campania**: first in **shipping**
- 3<sup>rd</sup>. **Friuli – Venezia Giulia**: first in **shipbuilding**
- 4<sup>th</sup>. **Veneto**: second in **port activity** and **fishing**
- 5<sup>th</sup>. **Sicilia**: first in **fishing**
- 6<sup>th</sup>. **Toscana**: second in **yachting**

## The Italian Logistics

- EUR 200 billion, 14% of the GDP
- EUR 80 billion: Contract Logistics turnover
- About 1 million employees

## The Italian port situation with Law 84/94

- 8,000 km of coastline
- 144 Commercial Ports
- 35 main Fishing Ports
- Over 400 Marinas
- 24 Port Authorities
- 15 Maritime Directorates
- 54 Coast Guard Offices



# The timing of the Port Reform

**“Sblocca Italia” Decree**  
**Law 133/2014** art. 29:  
adoption of the National  
Strategic Plan for  
Harbours and Logistics  
(PSNPL)

**Delegated Law Madia**  
(Art. 8 on ports)

**Entry into  
force of the  
Legislative  
Decree**

**2002**

**Nov. 2014**

**July 2015**

**Aug. 2015**

**Jan. 2016**

**????**

**Discussion  
starts in the  
Parliament on  
the Port  
Reform**

**Cabinet approves PSNPL**

**Legislative Decree**  
Reorganization,  
Rationalization and  
Simplifications of Port  
Authorities

## National Strategic Plan of Harbours and Logistics

The **target** of the National Strategic Plan of Harbours and Logistics (PSNPL) is **the integration of the Italian logistics network**, connecting at best the **ports** with the **railroad transport systems**, with the **logistics platforms** (Inland Ports), and **industrial districts** and intervening on delays, disruptions and inefficiencies of the current organization.

## The main innovations of the Port Reform

- Unification of Port Authorities
- Chairman of Port
- Management Committee
- Partnership Table of Sea Resources
- National Coordinating Table of Port Authorities
- Single Customs and Controls Window
- Concessions

# Unifications

## TODAY

- 24 Port Authorities

## TOMORROW

- **15 Port System Authorities** in charge of 54 national ports



# Chairman

## TODAY

- **Appointed** with **Decree of the Ministry of Infrastructure and Transport**, upon agreement with the **Region concerned**
- **Chosen** among a group of three (proposed by the City/Province/Chamber of Commerce) "**experts with excellent and proven professional qualifications in the fields of transport and port economy**"

## TOMORROW

- **Appointed** by the **Minister for Infrastructure and Transport** in agreement with the **president or presidents of the interested Regions**
- **Chosen** between "**parties with proven experience and professional qualifications in the fields of transport and port economy**"

**Port Authority and last  
Chairman**

**Ancona Manager**

**Augusta Manager**

**Bari Politician**

**Brindisi Manager**

**Cagliari Politician**

**Catania Politician**

**Civitavecchia Officer**

**Genoa Politician**

**Gioia Tauro Officer**

**La Spezia Politician**

**Livorno Politician**

**Marina Carrara Manager**

**Messina Officer**

**Naples Officer**

**Olbia Politician**

**Palermo Politician**

**Piombino Politician**

**Ravenna Manager**

**Salerno Politician**

**Savona Manager**

**Taranto Technician**

**Trieste Manager**

**Venice Politician**

- 
- **7 managers**
  - **5 officers**
  - **11 politicians**

## «Board» of the Port

### TODAY

- **Port Committee** with over **20 public and private** members

### TOMORROW

- **Management Committee** with **4 / 6** only **public** members

# Local Partnership Table of Maritime Cluster

## TODAY

- **Advisory committees**

## TOMORROW

- **Partnership Table**  
with advisory functions  
and members of the  
local **Maritime Cluster**

# Customs and Controls Single Window

## TODAY

- **Various administrations and very long bureaucratic procedures**

## TOMORROW

- **Customs Agency coordinates the inspections also of other administrations. Tight schedule** for the inspection of incoming and outgoing goods

# National Coordinating Table of Port Authorities

## TODAY

- **Ministry of Infrastructures and Transport** with **supervisory and control functions**

## TOMORROW

- **National table** with functions of **coordination and harmonization of strategic choices** of the Port Authorities
- **Coordinator: a technician or a politician?**

# Concessions

## TODAY

- **Granted by the Port Committee upon proposal of the Chairman**

## TOMORROW

- **Granted by the Chairman, after consulting the Management Committee**

## CONCLUSIONS

- **The Italian Maritime Cluster is still leader in many sectors**
- **The Italian ports can recover their leading positions after Reform**