The Italian Maritime Cluster and the Port Reform

19th May 2016

Umberto Masucci, Vice President Federazione del Mare
Federazione del Mare

established in 1994

16 member associations

Aidim *(maritime law)*
Ainia *(insurance)*
Ancip *(port operation)*
Assonave *(shipbuilding)*
Assoporti *(port administration)*
Assorimorchiatore *(towage)*
Confitarma *(shipping)*
Collegio Capitani *(maritime staff)*
Cetena *(naval research)*

Federagenti *(ship agency)*
Fedepiloti *(port pilotage)*
Federpesca *(fishing)*
Fedespedi *(international freight)*
Inail *(welfare)*
Rina *(certification)*
Ucina *(yachting)*

*strong links with maritime Institutions*
The European Maritime Cluster

- 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.)

Source: Censis 2015
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

*Source: Censis 2015*
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:

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

Source: Censis 2015 and Eurostat 2016
Italian Maritime Economy
A continuous growth in the years

1995-2014

+65% on GDP Pil

+60% employement

Source: Censis 2015
The Italian Maritime Cluster

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

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

Source: Censis 2015
The Italian Logistics

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

Source: SRM 2015
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

Sources: Wikipedia, Assoporti, General Command of the Coast Guard
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)

Discussion starts in the Parliament on the Port Reform

2002

Cabinet approves PSNPL

July 2015

Aug. 2015

Delegated Law Madia (Art. 8 on ports)


Legislative Decree Reorganization, Rationalization and Simplifications of Port Authorities

Entry into force of the Legislative Decree

????
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
“The new system”
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**"
<table>
<thead>
<tr>
<th>Port Authority and last Chairman</th>
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<tbody>
<tr>
<td><strong>Ancona Manager</strong></td>
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<td><strong>Augusta Manager</strong></td>
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<tr>
<td><strong>Bari Politician</strong></td>
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<td><strong>Brindisi Manager</strong></td>
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<td><strong>Cagliari Politician</strong></td>
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<td><strong>Catania Politician</strong></td>
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<td><strong>Civitavecchia Officer</strong></td>
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<td><strong>Genoa Politician</strong></td>
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<td><strong>Gioia Tauro Officer</strong></td>
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<td><strong>La Spezia Politician</strong></td>
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<td><strong>Livorno Politician</strong></td>
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<tr>
<td><strong>Marina Carrara Manager</strong></td>
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<td><strong>Messina Officer</strong></td>
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<td><strong>Naples Officer</strong></td>
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- 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

<table>
<thead>
<tr>
<th>TODAY</th>
<th>TOMORROW</th>
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<tbody>
<tr>
<td>▪ Advisory committees</td>
<td>▪ Partnership Table with advisory functions and members of the local Maritime Cluster</td>
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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
The Italian Maritime Cluster is still leader in many sectors.

The Italian ports can recover their leading positions after Reform.