

ITALIAN CLUSTER PRESENTATION

Federazione del Sistema Marittimo Italiano (Federazione del Mare) *Federation of Italian Maritime System (Federation of the Sea)*

DEFINITION OF THE CLUSTER

1) What are the underlying maritime sectors?

- Industrial activities:
 - maritime transport
 - maritime transport support services (agency and brokerage, goods handling, towage and fishing, insuring, certification, etc.)
 - merchant shipbuilding
 - recreational boating (including the tourism branch)
 - fishing

- Institutional activities:
 - port administration
 - maritime welfare

2) Trade Organizations involved in the Federation of the Sea:

- AIDIM: *Associazione Italiana di Diritto Marittimo* (maritime law)
- ANIA: *Associazione Nazionale tra le Imprese di Assicurazione* (insuring)
- ASSITERMINAL: *Associazione Italiana Terminalisti Portuali* (port logistics)
- ASSONAVE: *Associazione Nazionale dell'Industria Navalmecanica* (shipbuilding)
- ASSOPORTI: *Associazione Porti Italiani* (port administration)
- ASSORIMORCHIATORI: *Associazione Italiana Armatori di Rimorchiatori* (towage)
- CONFITARMA: *Confederazione Italiana Armatori* (merchant shipping)
- FEDERAGENTI: *Federazione Italiana Agenti Raccomandatari Marittimi, agenti aerei e mediatori marittimi* (maritime agency and brokerage)
- FEDARLINEA: *Associazione Italiana Armamento di Linea* (merchant shipping)
- FEDEPILOTI: *Federazione Italiana Piloti dei Porti* (piloting)
- FEDERPESCA: *Federazione Italiana delle Imprese di Pesca* (fishing)
- IPSEMA: *Istituto di Previdenza per il Settore Marittimo* (maritime welfare)
- RINA: *Registro Italiano Navale* (certification and classification)
- TMCR: *Associazione Nazionale per la Promozione del Trasporto Marittimo a Corto Raggio* (shortsea shipping promotion)
- UCINA: *Unione Nazionale Centri Industrie Nautiche e Affini* (boating)

3) Leading Maritime Companies in the relevant sectors:

Shipowners:

- COSTA CROCIERE
- DEJEULEMAR
- GRIMALDI GROUP
- LLOYD TRIESTINO
- MESSINA GROUP
- MONTANARI di NAVIGAZIONE
- TIRRENIA di NAVIGAZIONE

Merchant shipbuilders:

- FINCANTIERI

Shipbuilders leisure boating:

- AZIMUT-BENETTI
- FERRETTI
- CANTIERE NAUTICO CRANCHI
- C.N. SAN LORENZO
- FIPA ITALIANA YACHTS
- CANTIERI DI PISA
- SESSA MARINE

Fishing:

- MATTEO ASARO
- BIAGIO DE CANDIA
- ITTIPESCA SUD
- DITTA PAPPALARDO SALVATORE & ANIELLO
- MERIDIONAL PESCA
- DITTA LISMA NICOLO'

4) Economic indicators of the sectors, with added value, production value, employment, export, etc.

The Italian maritime sector on the whole accounts for about 2.3% of the country's Gross Domestic Product; almost 26.3 billion euro of annual production; over 356.000 people employed – that is about 1.5% of total national employment – of which about 186.000 directly in maritime activities and about 89.000 and 81.000 in economic sectors respectively generated upstream and downstream. The overall impact on the national economy is equal to 2.154 (i.e. for every euro of added demand €2.154 is generated in the Italian economy as a whole) and the total impact on national employment of 1.916 (i.e. every additional work unit leads to the creation of an additional 0.916 work units in the country as a whole).

In particular, the industrial maritime activities, which perform a mainly industrial and commercial function, show the most powerful impact on the economy and on national employment, with a GDP exceeding 24.2 billion euro and with 310.000 people directly and indirectly employed. Maritime transport, with a GDP of 12,600 million euro, creates about 50% of the entire wealth of the maritime sector. Furthermore, closely connected to that sector are the maritime transport support services, whose GDP is 3,455 million euro. The GDP of merchant shipbuilding and fishing are 2,515 and 2,925 million euro, respectively. Finally, the contribution of recreational boating, net of the maritime tourism branch, is 1,635 million euro, to which the 3,520 million share generated by tourism should be added.

The institutional maritime activities (Navy, Coast Guard, Port Authorities), although having a smaller impact on the national economic balance, give nonetheless a substantial contribution to the absolute values of production and employment. However, the contribution of such non-industrial and non-commercial maritime activities is not at all insignificant: over 2.6 billion euro and 50.000 work units; the 85% of both values are generated only by the Italian Navy. Economic statements for such activities have been taken from the year 2000 State balance, and do not take into consideration what cannot be quantified in monetary terms but provides the Country in terms of defence, policing, security and services.

Compared with the figures of other industrial sectors, the 26.3 billion euro of the maritime economy is slightly greater than that reported by agriculture and well over that of many of the traditional national production sectors: the car industry, the plastic and rubber industry, the wood industry.

Tab. 4.1 – Maritime economy figures, 2000 (millions of euro)

	Industrial maritime activities (1)	Non industrial maritime activities (2)	Total maritime sector (3)
Input/output			
GDP (net of duplication)	24,230	2,635	26,290
Multiplier	2.333	1.510	2.154
Work units (AWUs)			
AWUs direct	144,240	41,590	185,830
Total (net of duplication)	310,540	50,270	356,075
Multiplier	2.153	1.209	1.916

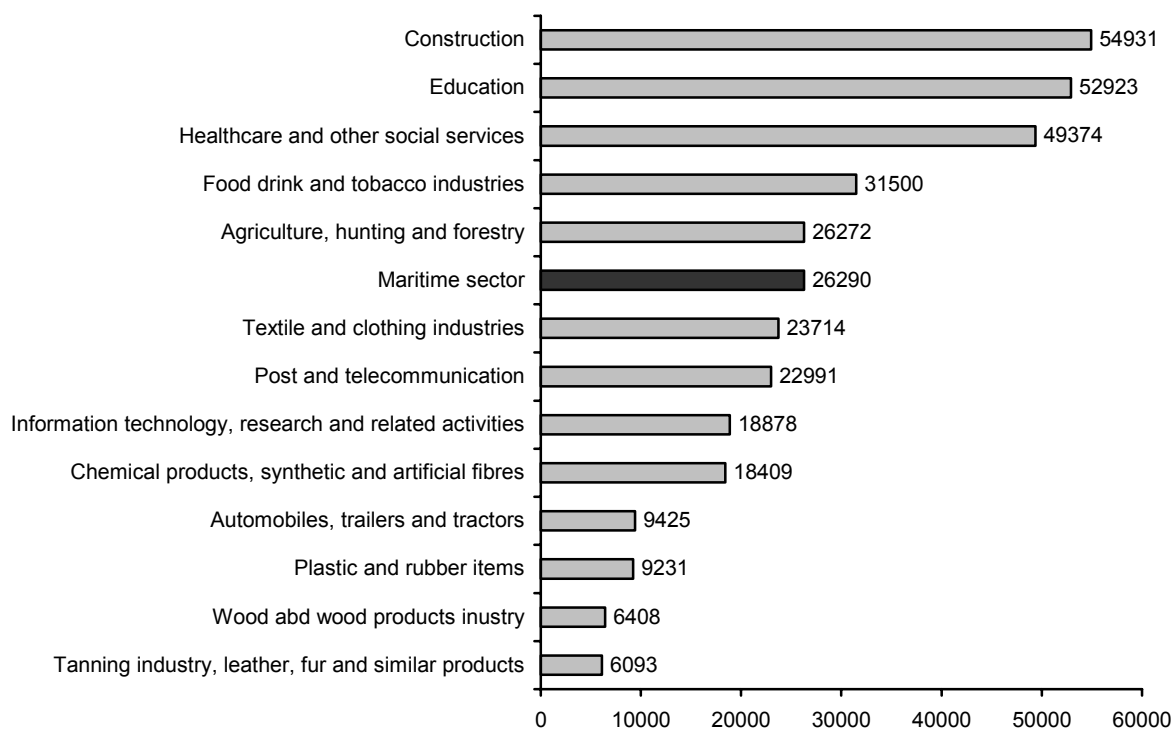
(1): Maritime transport, maritime transport support services, merchant shipbuilding, recreational boating (including tourism branch) and fishing.

(2): Navy, Coast Guard, Port Authorities.

(3): The total may not correspond to the total of the line values due to possible duplication

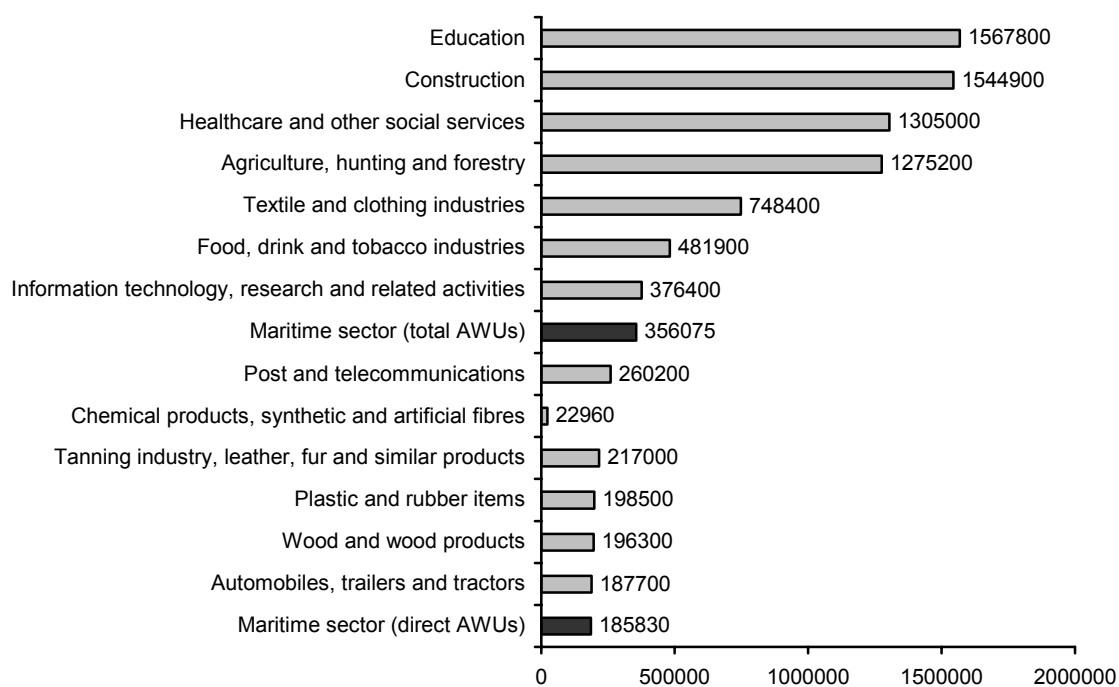
Source: Censis, 2002

Fig. 4.1 – Gross domestic product: comparison between branches of the economy, 2000 (millions of euro)



Source: Censis, 2002

Fig. 4.2 – Work units: comparison between branches of the economy, 2000 (millions of euro)



Source : Censis, 2002

Tab. 4.2 – Economic input statements, 2000 (millions of euro at current prices)

Total maritime economic activities	
Real production at factor cost	20,190
<i>of which:</i>	
value added at factor cost	8,790
Intermediate costs	11,400
Imports	1,980
Distribution costs	4,225
Other (net taxes)	-185
Total input	26,210

Source: Censis, 2002

Industrial activities:

Tab. 4.3 – Characteristics of the five sectors of the maritime industry, 2000

Input/output					
Sectors	GDP (mm of euro)		Multiplier		
Maritime transport	12,600		2.709		
Maritime transport support services	3,455		1.826		
Merchant shipbuilding	2,515		3.526		
Recreational boating (with tourism branch)	5,155		5.019		
Fishing	2,925		2.198		
Total (net of duplications)	24,230		2.333		
Work units (AWU)					
Sectors	Direct	Upstream Downstream	Total	Multiplier	
Maritime transport	26,800	54,710	81,510	3.041	
Maritime transport support services	28,240	16,220	44,460	1.574	
Merchant shipbuilding	15,500	17,150	32,650	2.106	
Recreational boating (with tourism branch)	10,400	71,820	82,220	7.906	
Fishing	63,300	25,550	88,850	1.404	
Total (net of duplications)	144,240	166,300	310,540	2.153	

Source: Censis, 2002

Maritime transport

There are two quantitative economic elements that characterize maritime transport: *the largest production value* (12,600 million euro GDP, equal to approx. 50% of the entire maritime industry) and the *highest export level* (10,720 million euro – equaling 76.7% of total exports.) In addition, the fact that it is a sector with a *high level of upstream integration* and little dependence on foreign markets means that the *impact* on production is considerably *greater* than the average of the maritime industry. Overall, it is a sector with a *high capacity for generating revenue*: for every 100 euro of added final demand that is directed to this industrial maritime sector, the national economic system creates production of 270.80 euro.

From the employment perspective, it is characterized by a *high upstream impact* (2,274), the direct consequence of the high level of upstream integration noted above. Upstream of its production process, maritime transport activates 60,930 AWUs (Average Working Units), a number that is very high if compared with the total of AWUs generated upstream – net of duplications – by the maritime industry (85,040 AWUs). Using a total of 81,510 AWUs and with a multiplier of 3.041, it is a sector that *strongly impacts the national labour market*: 100 additional work units in maritime transport activate a total of 304 AWUs.

Finally, it is a sector with a *particularly high work unit productivity*: on average, in 2000, the production of one direct work unit was 518,000 euro (comparable to production per employee) and a value added by one work unit of 182,000 euro (value added per employee). The corresponding values for the maritime industry in its entirety are 140,000 euro (production per employee) and 61,000 euro (value added per employee).

Maritime transport support services

This sector's dynamics are closely connected to those of maritime transport. With a GDP of 3,455 million euro, it is the *second* sector by *production size* (if the tourism branch is not counted for boating.). It can be defined as a *relatively self-sufficient* sector: only half of production depends on other branches of the national economy. Furthermore 90% of the income are used in intermediate consumption, i.e. sold to other branches. The revenue multiplier (1.826) is the lowest of the maritime industry.

This sector uses a relatively *high amount of direct AWUs* (28,240) in its production process (more than maritime transport). The upstream employment impact, still keeping in consideration the limited production value compared to maritime transport, is considerable (16,220 AWUs). The multiplier therefore (1.574) shows the moderate (compared to the average of the maritime industry), but still significant capacity of the sector to create work force.

It is a sector with a *lower than the average work factor productivity*: on average, in 2000, the production of one direct work unit was at 120,000 euro and the value added of one work unit was 60,000 euro, a direct result of the high number of direct AWUs mentioned above.

Merchant shipbuilding

While in absolute terms, this sector has a production size that – compared to the other maritime sectors – is medium low (GDP 2,515 million euro), it is nonetheless especially noteworthy for its large capacity to create income as it has the *highest multiplier* (excluding the tourism branch for boating), 3.526. This can be attributed to a strong *upstream impact*, due to the *high degree of upstream integration*. The production of the shipbuilding industry depends strongly on other branches of the national economy: for every 100 euro of production it must purchase 76.10 euro of goods and services from the rest of the economic system. On the output

side, 2,170 million euro were sold to other branches to be used in the respective production processes (intermediate consumption) and 1,595 million euro are exported (export orientation second only to that of maritime transport).

The AWUs directly used in the production process (15,500 direct AWUs) reflect the size of the sector, while those used upstream (17,150) reflect the high degree of upstream integration.

Production per employee is 167,000 euro per year, greater than the average.

Recreational boating

For recreational boating, the estimates were made preliminarily considering *recreational boating in the narrowest sense* and then including the maritime tourism branch, which is estimated at 3,520 million euro. It is important to emphasize the difference. In the first case, with a GDP of 1,635 million euro, recreational boating shows the smallest proportions of all of the maritime industry, while in the latter case, with a GDP of 5,155 million euro, it is second only to maritime transport. The different capacity to generate income is seen particularly in the multiplier (which goes from 2.284 to 5.019). So, recreational boating has the *highest capacity of economical activation* among all of the sectors of the maritime industry. For every 100 euro invested in this sector, production of 501,9 is activated. Finally, a noteworthy amount goes to foreign markets.

Similarly to production, the tourism-related industries also affect downstream employment with 61,000 work units. With the highest employment multiplier (7.906) among the five analyzed sectors, recreational boating in its entirety shows its potential to be the *most dynamic sector* in terms of the creation of *new work force*. For every 100 additional work units a total of 791 AWUs are activated. Furthermore, with 82,220 total AWUs overall, it is the second sector in the maritime industry in terms of employment used.

Finally, per employee production of 136,000 euro and per employee value added of 54,000 euro, both less than the average of the maritime industry, show the relative importance in quantitative terms of the AWUs used directly in the sector (10,400).

Fishing

Fishing, with a GDP in 2000 of 2,925 million euro, is the most “self-sufficient” sector, with a production that only in small part depends on goods and services supplied by other branches of the national economy. Conversely, among all of the sectors of the maritime industry, it is the one with the *greatest foreign dependence*. Together these two factors mean that the *total impact on production* (1.080) is also the *least*, but being a sector that stimulates the food industry activities and those of wholesale and retail trade, it has an excellent capacity for *creating wealth* in subsequent stages of production.

This is the sector that employs the *greatest total number of employees* (88,850 total AWUs, of which 63,300 are directly employed in fishing activities). Given its quality of actively stimulating the market in the stages following production, downstream employment (23,050 AWUs) deriving from it is especially large.

Fishing is the sector with the *lowest productivity* of those under consideration: 21,000 euro production per employee and 16,000 euro value added per employee. Similar to the maritime transport support services, this is the direct result of the very high employment used directly by the sector.

Institutional activities

Economic figures for these activities are based on the State balance, assuming that they are comparable to those of industrial sectors themselves.

Navy

The accounting system used starts from the assumption that the final budget is equal to input at market price (which in turn coincide with the real production at factor cost, because import and distribution costs are zero). The 2,225 million euro of “production” are therefore divided between the value added (1,455 million euro), which can be included in the army and staff expenses and intermediate costs (770 million euro), which can be interpreted as modernization and renovation expenses, or investments. From this subdivision, it emerges that in 2000 the Navy put 34% of its total expenditures to investments and the remaining part – 65,% – to regular management expenses. Though the Navy does not generate downstream wealth from its “productive processes”, it contributes intensively to the formation of national revenue with a multiplier equal to 1.529. For every 100 additional euro going to the Navy, a total of 152.90 euro of “production” is activated.

The total work units (42,540 units) are in large measure composed of AWUs directly used by the Navy (34,950 units). The latter were calculated counting only the military personnel (excluding those in training). Conversely, the 7,590 upstream AWUs correspond to the labor force indirectly generated in those sectors (primarily merchant shipbuilding) which produce goods and services needed by the Navy.

Coast Guard

In this case as well, input at market price (325 million euro) coincide with the real production at factor cost, as there are no import or distribution costs. More specifically, “production” consists of 230 million euro of value added (regular expenses such as salaries, stipends, etc.) and by 95 million of intermediate costs (investments). The revenue multiplier is 1.413. For every 100 euro of added demand that is made of this “sector” 141,30 euro of production is created in the total national economic system.

The direct work units, estimated at 5,440 units, were calculated on the basis of the military personnel permanently in service on 31 December 2000. To these, 960 upstream AWUs were added, in sectors which produce goods and services.

Port Authorities

The reported data refer to the 21 Port Authorities existing in the year 2000 (currently 25) and members of Assoportì. Production at factor cost, for the same reasons noted above for the Navy and the Coast Guard, coincides with the income at market price (85 million euro). The amount that can be attributed to the value added comes to 60 million euro, while those related to intermediate costs are 25 million euro. The Port Authorities directly use 1,200 AWUs and indirectly activate upstream another 130, for a total of 1,330 units.

Tab 4.4 - Economic input statements in principal sectors, 2000 (millions of current euro)

Economic input statement aggregates	Industrial Activities						Institutional activities		
	Maritime transport	Maritime transport support services	Merchant ship building	Recreational boating		Fishing	Navy	Coast Guard	Port Authorities
				Without tourism branch	With tourism branch				
A=B+C	13,870	3,375	2,590	1,415	1,415	1,360	2,225	325	85
B	4,890	1,685	620	565	565	1,030	1,455	230	60
C	8,980	1,690	1,970	850	850	330	770	95	25
D	2,210	30	80	35	35	65			
E	235	335	465	295	295	650	0	0	0
F	-1,045	0	0	230	3,750	1,520	0	0	0
G=A+D+E	12,835	3,790	2,980	1,930	5,450	3,575	2,225	325	85
Multiplier	2,708	1,826	3,526	2,284	5,019	2,198	1,529	1,413	1,417

Source: Censis, 2002

Tab 4.5 – Economic statements of output in principal sectors, 2000 (millions of current euro)

Economic statement of output aggregates	Industrial activities							Institutional activities		
	Maritime transport	Maritime transport support services	Merchant ship building	Recreational boating		Fishing	Navy	Coast Guard	Port Authorities	
				Without tourism branch	With tourism branch					
a	1,475	3,470	2,170	0	0	275	0	0	0	0
b	640	140	0	680	4,200	3,100	2,225	325	85	85
c	0	0	50	20	20	30	0	0	0	0
d	0	0	-835	-90	-90	0	0	0	0	0
e	10,720	180	1,595	1,320	1,320	170	0	0	0	0
f=b+c+d+e	11,360	320	810	1,930	5,450	3,300	2,225	325	85	85
g=a+f	12,835	3,790	2,980	1,930	5,450	3,575	2,225	325	85	85

Source: Censis, 2002

Tab 4.6 – Work units (AWUs) in the principal sectors, 2002

Work units by type	Industrial activities						Institutional activities		
	Maritime transport	Maritime transport support services	Merchant ship building	Recreational boating		Fishing	Navy	Coast Guard	Port Authorities
				Without tourism branch	With tourism branch				
a	26,800	28,240	15,500	10,400	10,400	63,300	34,950	5,440	1,200
b	60,930	16,220	17,150	7,390	7,390	2,500	7,590	960	130
c	-6,220 (*)	0	0	3,430	64,430	23,050	0	0	0
d=a+b+c	81,510	44,460	32,650	-90	82,220	88,850	42,540	6,400	1,330
Multiplier	3.041	1.574	2.106	1,320	7,906	1,404	1,217	1,176	1,108

(*): This post is negative because maritime transport does not purchase downstream sectors.
Source: Censis, 2002

5) Statistics:

Tab. 5.1 – 1995-2002 development of the Italian mercantile fleet

Year	Italian flag		Foreign flag		Total	
	N. of ships	GRT	N. of ships	GRT	N. of ships	GRT
1995	1,356	6,905,447	83	1,875,923	1,439	8,781,370
1996	1,308	6,604,887	92	2,187,822	1,400	8,792,709
1997	1,241	6,458,586	90	2,140,081	1,331	8,598,667
1998	1,264	7,184,316	67	1,527,279	1,331	8,711,595
1999	1,339	8,437,254	48	1,153,565	1,387	9,590,819
2000	1,376	9,475,503	20	472,668	1,396	9,948,171
2001	1,383	9,780,962	9	184,937	1,392	9,965,899
2002	1,422	10,264,104	9	121,801	1,431	10,385,905

Source: Confitarma

Tab. 5.2 - Composition of the Italian merchant fleet

Types of ships of over 100 gt	31 december 2002		31 december 2001		Variation	
	N	gt	N	gt	N	gt
Liquid cargo ships	286	2.757.381	281	2.583.617	2%	7%
Oil tankers	96	1.228.585	107	1.492.171	-10%	-18%
Gas tankers	48	355.047	49	358.323	-2%	-1%
Chemical tankers	109	1.143.312	96	703.953	14%	62%
Other tankers	33	30.437	29	29.170	14%	4%
Dry cargo ships	186	4.557.127	180	4.577.749	3%	0%
General cargo ships	31	146.109	32	146.231	-3%	0%
Container and refrigerator ships	36	1.010.343	30	912.651	20%	11%
Bulk carriers	41	1.543.469	44	1.775.962	-7%	-13%
Ferries	78	1.857.206	74	1.742.905	5%	7%
Passenger ship	419	2.297.185	406	2.046.105	3%	12%
Cruise ships	16	630.344	15	548.208	7%	15%
Hovercraft, catamarans and fast units	82	22.361	84	25.977	-2%	-14%
Ferries	213	1.620.307	208	1.449.749	2%	12%
Other passenger ships	108	24.263	99	22.171	9%	9%
Multipurpose carriers (Ore/Oil, OBO)	4	145.840	4	171.347	0%	-15%
Auxiliary service ship	536	628.282	521	587.079	3%	7%
Tugboats and supply vessels	308	123.233	302	118.320	2%	4%
Others	228	505.049	219	468.759	4%	8%
TOTAL	1.431	10.385.905	1.392	9.965.897	3%	4%

Source: Confitarma processing of Rina and Confitarma data

Tab. 5.2 bis - Renewal of the Italian merchant fleet

Types of ships	Ships under construction as of 1/1/ 2003			Ships delivered between 1993 and 2002		
	No.	gt	%	No.	gt	%
Liquid cargo ships	17	236.448	9%	131	1.945.246	71%
Oil tankers	3	93.500	8%	27	752.795	61%
Gas tankers	5	44.100	12%	23	248.061	70%
Chemical tankers	9	98.848	9%	79	942.360	82%
Other tankers				2	2.030	7%
Dry cargo ships	7	334.613	7%	58	2.257.639	50%
General cargo ships	1	27.839	19%	5	81.212	56%
Container and refrigerator ships				8	319.847	32%
Bulk carriers				21	834.803	54%
Ferries	6	306.774	17%	24	1.021.777	55%
Passenger ships	14	446.374	19%	83	1.200.646	52%
Passenger ships	9	289.899	43%	30	336.147	50%
Ferries	5	156.475	10%	53	864.499	53%
Auxiliary service ships	32	66.229	11%	165	160.713	26%
Tugboats and support ships	6	4.618	4%	68	30.774	25%
Other types of ships	26	61.611	12%	97	129.939	26%
TOTAL	70	1.083.664	10%	437	5.564.244	54%

a) Ships of more than 100 gt

b) Ordered ships under construction are excluded

c) % of current fleet

Source: Confitarma processing of Rina and Confitarma data

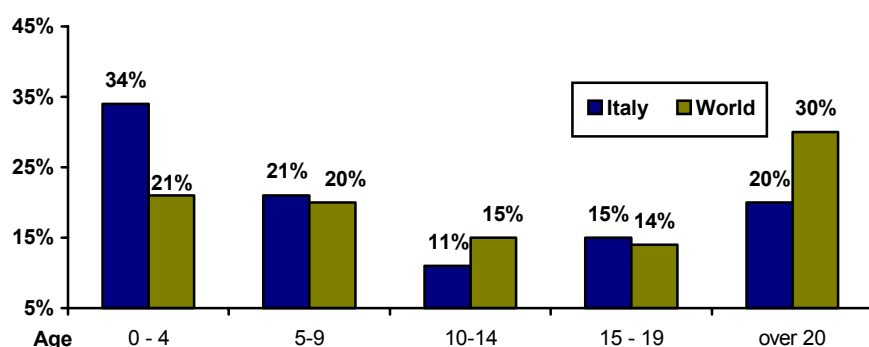
Tab. 5.3 - World Fleet: cargo tonnage controlled by principal maritime countries (national flag and foreign flag)–/Ships greater than 1.000 gt as of 1 January 2003

		<i>Controlled Fleet</i>		<i>National flag</i>		<i>Foreign flag</i>		(1)	(2)
		N.	000 dwt	N.	000 dwt	N.	000 dwt		
1	Grecia/Greece	3.064	148.905	755	44.906	2.309	104.000	69,8%	18%
2	Giappone/Japan	2.826	103.166	669	13.361	2.157	89.805	87,0%	13%
3	Norvegia/Norway	1.346	56.487	645	26.003	701	30.484	54,0%	7%
4	Cina/China	2.070	42.735	1.414	21.947	656	20.788	48,6%	5%
5	USA	984	41.587	416	12.178	568	29.409	70,7%	5%
6	Germania/Germany	2.274	40.726	368	7.568	1.906	33.158	81,4%	5%
7	Hong Kong	567	37.573	228	12.968	339	24.605	65,5%	5%
8	Corea del Sud/South Korea	779	25.577	410	8.828	369	16.749	65,5%	3%
9	Taiwan	520	22.475	129	6.400	391	16.075	71,5%	3%
10	Singapore	663	19.139	424	12.576	239	6.563	34,3%	2%
11	Regno Unito/United Kingdom	605	17.058	258	7.324	347	9.735	57,1%	2%
12	Danimarca/Denmark	587	16.457	296	8.325	291	8.131	49,4%	2%
13	Russia	1.725	14.821	1.378	7.097	347	7.724	52,1%	2%
14	ITALIA/Italy	573	11.850	460	8.151	113	3.699	31,2%	1%
15	Arabia Saudita/Saudi Arabia	102	10.986	44	915	58	10.071	91,7%	1%
16	India	288	10.298	253	9.323	35	975	9,5%	1%
17	Turchia/Turkey	569	8.912	437	7.338	132	1.575	17,7%	1%
18	Iran	129	7.027	127	6.875	2	152	2,2%	1%
19	Svezia/Sweden	311	6.852	155	1.422	156	5.429	79,2%	1%
20	Malaysia	283	6.518	233	5.690	50	828	12,7%	1%
21	Svizzera/Switzerland	231	6.509	12	691	219	5.818	89,4%	1%
22	Belgio/Belgium	114	6.460	2	5	112	6.455	99,9%	1%
23	Brasile/Brazil	157	6.082	138	4.729	19	1.353	22,2%	1%
24	Francia/France	211	5.586	115	2.584	96	3.001	53,7%	1%
25	Paesi Bassi/Netherland	648	5.564	491	3.402	157	2.161	38,8%	1%
26	Filippine/Philippines	320	4.829	290	4.062	30	766	15,9%	1%
27	Indonesia	567	4.238	481	3.157	86	1.081	25,5%	1%
28	Canada	208	4.231	103	885	105	3.346	79,1%	1%
29	Spagna/Spain	231	3.783	146	1.869	85	1.914	50,6%	0%
30	Kuwait	32	3.388	32	3.388	0	0	0,0%	0%
	Altri/Others	3.237	50.956	2.007	23.076	1.230	27.879	54,7%	6%
<i>Tonnage controlled by unknown shipowners</i>		4.174	57.439						
Worldwide total		30.395	808.215	12.916	277.045	13.305	473.731	63,1%	100%

(1): portion under foreign flag

(2): portion of world fleet

Fig. 5.1 – Age of Italian and of world fleets in 2002



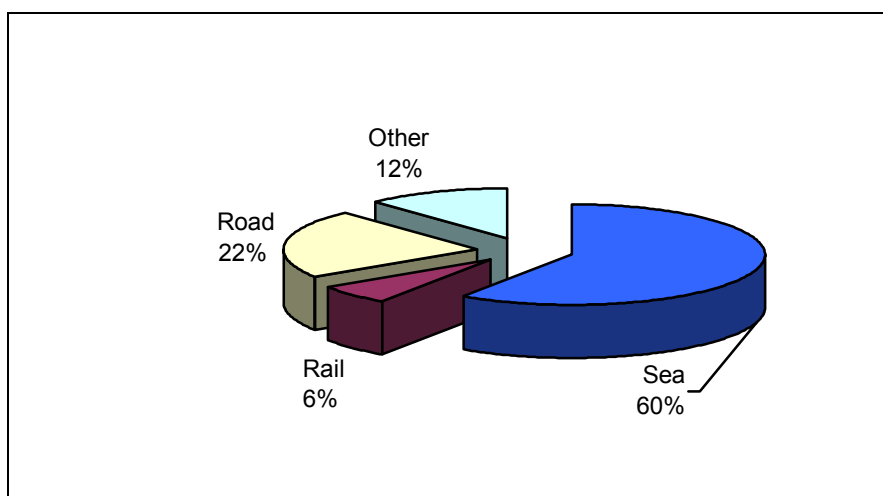
Source: Confitarma processing of RINA and Lloyd Register data

Tab. 5.4 - Total navigation movement

Year	Goods	Passengers
	(thousands of tons)	(thousands)
1987	366,432	43,329
1988	375,477	46,389
1989	377,907	46,104
1990	404,999	50,918
1991	430,376	51,353
1992	402,506	49,733
1993	393,078	49,175
1994	399,124	47,678
1995	402,986	48,908
1996	443,518	56,710
1997	459,246	80,184
1998	475,670	80,621
1999	463,069	85,441
2000	469,622	79,152
2001	444,804	88,882
2002	457,958	82,700

(*) Internal estimates of the Office of Statistics of the Transport and Navigation Ministry
 Source: *National Accounts of Transport, various years*

Fig. 5.2 - Italian foreign trade by mode of transport



Source: Eurostat 2002

Tab 5.5 - Traffics in the main Italian ports

	1997		1998		1999		2000		2001	
	000 Tonn.		000 Tonn.		000 Tonn		000 Tonn		000 Tonn	
<i>liquid bulk</i>	178.774	-0,63%	189.487	+6,0%	178.560	-5,77%	192.797	+7,97%	192.474	-0,17%
<i>dry bulk</i>	82.689	+0,51%	87.763	+6,14%	91.330	+4,10%	92.672	+1,47%	92.967	+0,32%
<i>General cargo</i>	92.793	+18,74%	104.547	+12,67%	109.956	+5,17%	142.216	+29,34%	148.451	+4,38
<i>Total</i>	354.256	+4,10%	381.797	+7,77%	379.846	-0,51%	427.685	+12,60%	433.891	+1,45%
Passengers	000		000.		000.		000		000.	
	33.382	+5,82%	33.910	+1,58%	34.934	+3,02%	42.184	+20,75%	43.620	+3,40%

(*) *stime*

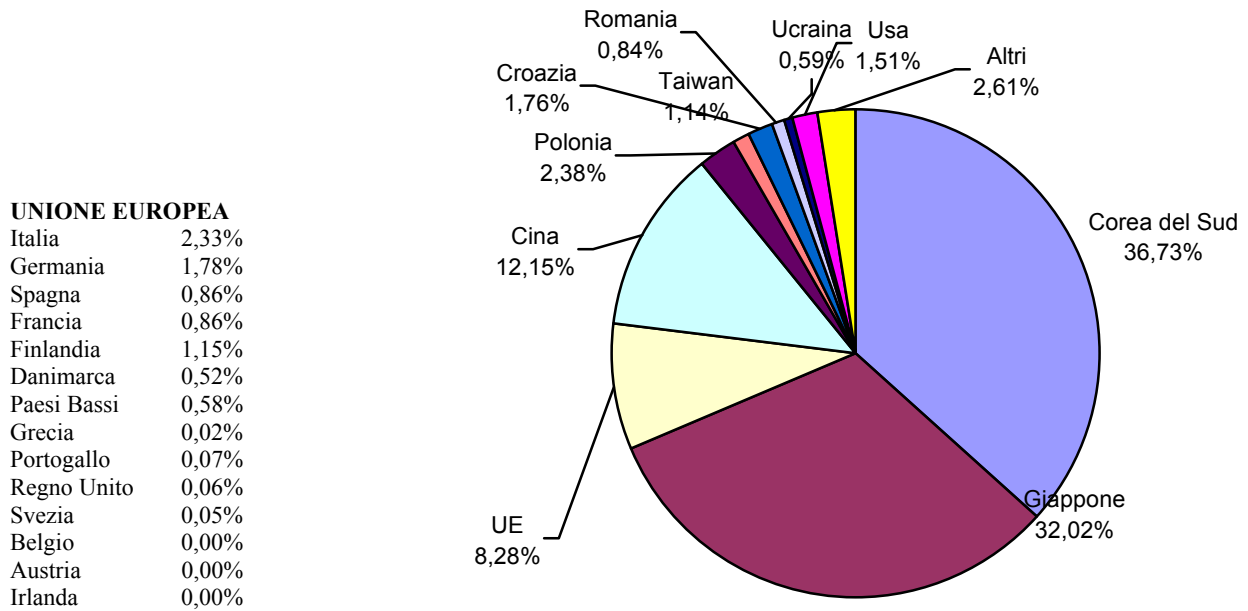
Source: Assoport

Tab 5.6 – Container handling in principle Italian ports from 1995 to 2002(TEU)

Port	1995	1996	1997	1998	1999	2000	2001	2002	Var.% 1995- 2002	Var.% 2001- 2002
Gioia Tauro	16,048	486,946	1,444,441	2,082,761	2,371,627	2,652,701	2,488,000	2,954,000	16,429.8	20
Genova	615,152	825,752	1,179,954	1,265,593	1,233,817	1,500,632	1,527,000	1,531,000	143.9	0.3
La Spezia	965,483	871,100	615,542	731,882	802,191	909,962	975,000	975,000	-5.8	0
Livorno	423,729	416,622	501,146	522,466	457,842	501,339	521,000	547,000	18.3	3.6
Naples	234,767	245,806	299,117	319,686	308,679	396,562	186,000	472,000	68.9	138
Salerno	173,880	190,032	201,680	207,927	238,025	275,963	430,000	446,000	58.7	3.3
Venice	127,878	168,821	211,969	206,389	199,803	218,023	321,000	375,000	70.5	16.7
Trieste	150,013	172,847	201,918	171,297	185,263	206,134	246,000	262,000	37.4	6.6
Ravenna	193,374	159,818	188,223	172,524	173,405	181,387	201,000	185,000	-6.2	-7.6
Ancona	26,873	46,727	65,555	66,138	45,524	83,934	158,000	161,000	212.3	1.4
Total	2,297,197	3,584,471	4,909,545	5,746,663	6,016,176	6,926,637	7,172,000	8,049,000	136.6	12.9

Source: Censis calculation on Confitarma data, 2001

Fig. 5.3 - Break-down of shipyards orders



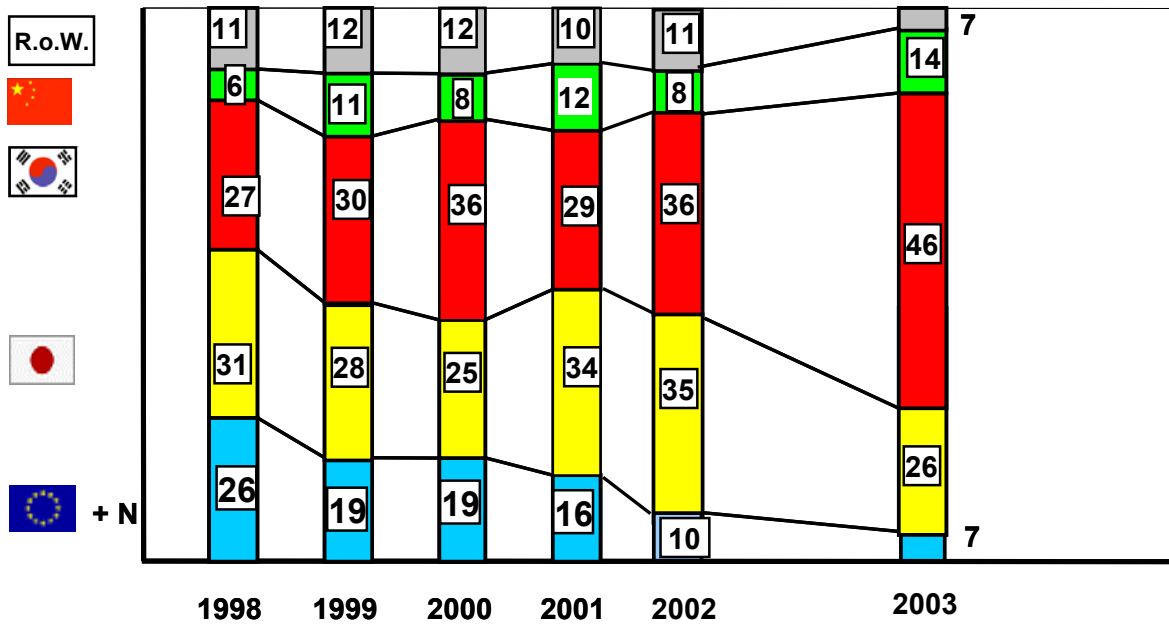
Data as of 31/12/2002
 Source: Lloyd's Register

Tab. 5.7 - Orderbook of the Italian Shipyards

<i>Type of ship</i>	<i>number</i>	<i>Dwt</i>	<i>Gt</i>	<i>Cgt</i>
Product	5	40.500	24.500	33.200
Ro-Ro	2	10.000	55.000	41.250
LPG	2	5.400	5.800	7.250
Ferry	7	27.388	170.970	154.800
Passenger	8	56.800	798.376	997.626
Others	20	480	4.178	23.788
Total	44	140.568	1.058.824	1.257.914

Source: Assonave

Fig. 5.4 - Market shares of world shipyards, % Total orders



Source: Assonave

Fig. 5.5 - Cruise ships under construction as of January 2004

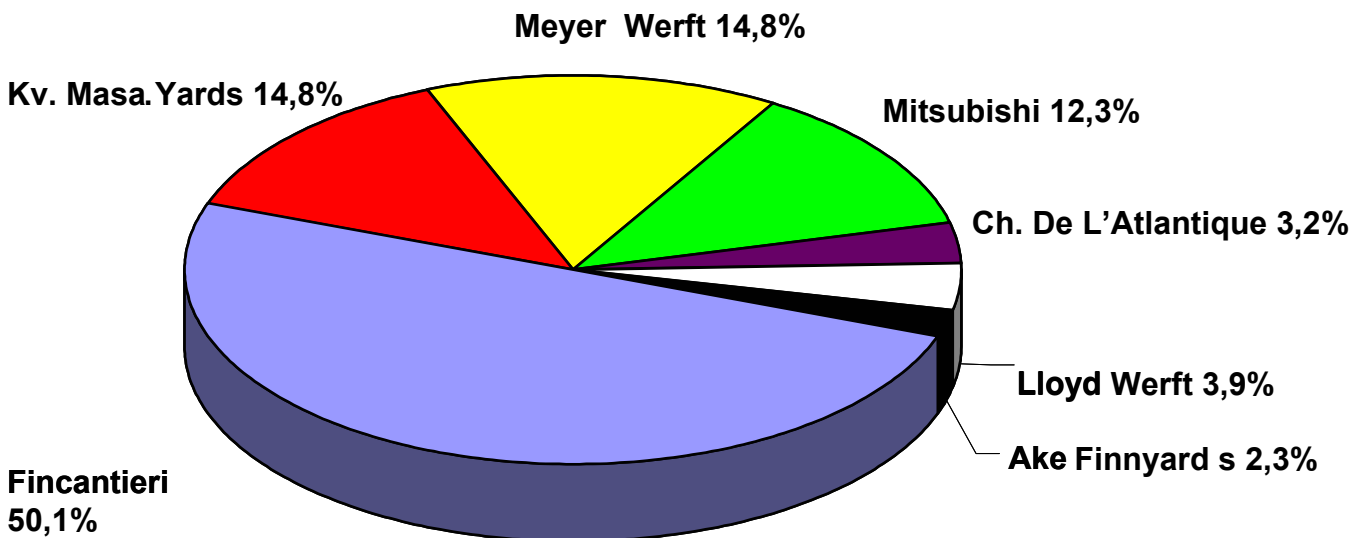
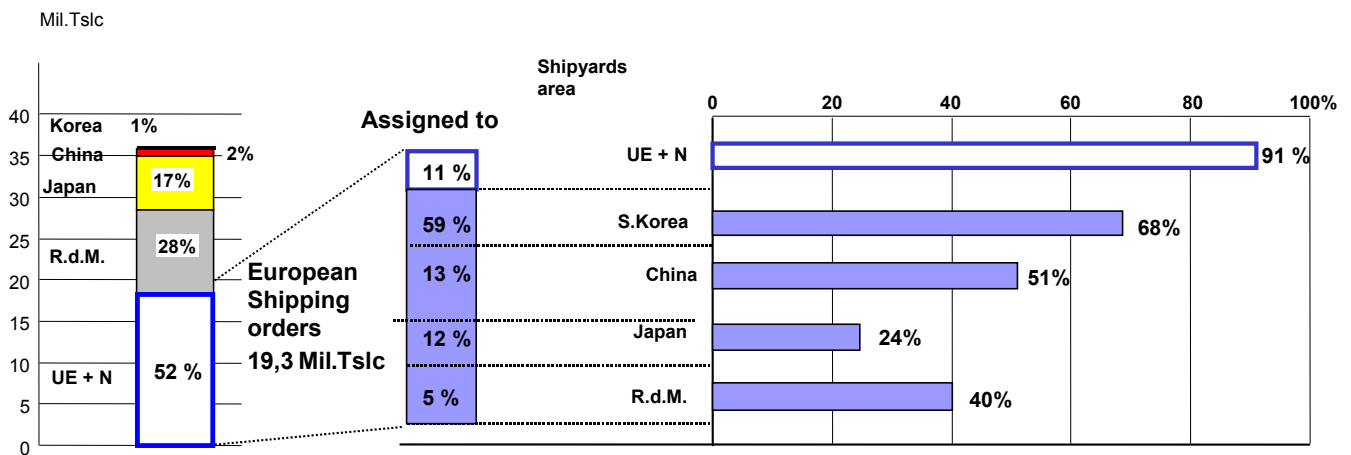


Fig. 5.6 – Orders of european shipping



Source: Assonave

Tab. 5.8 – National production of recreational units in 2000

	Production percentage	Number of units produced (v.a.)	Average cost of units (thousands of euro)
Inboard and inboard/outboard units	79.9	3,700	175.4
Outboard units	8.2	8,000	8.3
Sail units	6.0	1,500	32.4
Inflatable boats	5.9	11,200	4.2
Total	100.0	24,400	33.3

Source: Censis calculation on UCINA data, "Recreational boating figures", 2001

Tab. 5.9 – The three selectors of recreational boating, year 2000 (values in thousands of euro)

	Recreational	Accessories	Motors
Number of employees	4,750	6,592	3,648
Total boating revenues	957,018	559,438	155,970
National revenues (internal + export)	811,870	456,548	47,514
Total import	145,148	102,890	108,456
Total export	640,923	155,015	29,955
EU export	371,626	106,960	25,761
EXTRA EU export	269,297	48,054	4,194

Source: Censis calculation on UCINA data, 2000 and 2001

Tab. 5.10 – National production of recreational units (domestic revenues in millions of lire/current euros)

Years		Units Inboard Inboard/outboard	Units outboard	Sail units	Inflatable boats	Total
1983		109,469	9,267	26,670	18,048	164,454
1984		111,483	10,351	24,730	14,777	161,341
1985		113,097	10,564	23,741	14,964	162,366
1986		106,110	9,216	23,945	13,478	152,749
1987		122,634	15,584	20,463	13,750	172,431
1988		138,775	19,379	22,610	17,139	197,903
1989		145,606	20,746	24,987	14,899	206,238
1990		209,804	26,636	26,435	15,598	278,833
1991		129,744	57,208	14,558	32,478	233,988
1992		107,179	43,051	14,937	42,921	208,088
1993		90,324	20,848	18,975	33,659	163,806
1994		78,321	21,227	15,134	30,540	145,222
1995		97,648	22,177	18,457	40,310	178,592
1996		108,831	22,297	15,407	42,801	189,336
1997		89,500	39,200	19,605	53,340	201,645
1998		105,920	49,735	25,719	53,525	234,899
1999	lire	123,345	64,376	25,935	58,190	271,846
	euro	63.7	33.2	13.4	30.1	140.4
2000	lire	158,000	79,140	29,365	64,495	331,000
	euro	81.6	40.9	15.2	33.3	170.0
Var.% 1990-2000		-24.7	197.1	11.1	304.2	18.7
Var.% 1995-2000		61.8	256.9	59.1	60.0	85.3

Source: Censis calculation on Ucina data, “Recreational boating figures”, 2001

DETAILS OF CLUSTER ORGANIZATION

1) *Mission Statement:*

The maritime system plays a key role in Italy, considering the strong interdependence of our economy with foreign markets, Italy’s coastal layout and the civic and economic importance of sea towns.

Created on may 1994, for the initiative of shipping, shipbuilding, maritime agencies and brokers, terminal operators, recreational boating and fishing, the Federation of Italian Maritime System (Federation of the Sea) collects the most important organizations of Italian maritime sector, in order to:

- provide unified and stronger representation for the maritime world, in order to address common problems, without replacing the single member organizations;
- raise awareness of the maritime system as a development factor;

- affirm its commonly-held values, culture and interests, arising from a continuous contact with the international scene.

2) Board composition and operational staff of Federation of the Sea:

President: Corrado Antonini
General Secretary: Giuseppe Perasso
Vice Secretary General: Carlo Lombardi
Junior officer: Carolina Cutolo

Members of the Board:

Francesco Berlingieri, Aidim President
Angelo Ansaldo, Ania Board Member
Luigi Giovannini, Ania Board Member
Cirillo Orlandi, Assiterminal President
Ignazio Messina, Assiterminal Vice President
Stefano Silvestroni, Assonave Vice President
Tommaso Affinita, Assoportivi President
Francesco Nerli, Assoportivi Honorary President
Lucio Zagari, Assorimorchiatori President
Giovanni Montanari, Confitarma President
Paolo Clerici, Confitarma Past President
Giuseppe Ravera, Fedarlinea President
Franco Pecorini, Fedarlinea Board Member
Gianfranco Gasperini, Fedepiloti Director
Luigi Negri, Federagenti President
Giannandrea Palomba, Federagenti Vice President
Emanuele Sciacovelli, Federpesca Vice President
Nicola Lisma, Federpesca Board Member
Antonio Parlato, Ipsema President
Vittorio Lautizi, Ipsema Board Member
Gaspere Ciliberti, Rina President
Claudio Campana, Rina Vice President
Gianpaolo Polichetti, Tmcrc President
Paolo Vitelli, Ucina President
Anton Francesco Albertoni, Ucina Vice President

Headquarters: Piazza SS. Apostoli, 66 – 00187 Rome
Tel. 06/67481402 - Fax 06/6781670 - e-mail: segreteria@federazioneidelmare.it

3) Organizational Set Up

The Federation is lead by the President and the Council. The first is elected every two years. The second is composed of two members each organization. A Secretary General is nominated every three years to assure the continuity of management. He is assisted by a Vice Secretary General, provided by Confitarma, the Italian Shipowners' Association, and by a junior officer. A consultative body is foreseen, but has not been created yet, to assemble opinion-makers as well as qualified interests relevant to the maritime system development.

4) Participants

All members of the Federation have equal access to the Council. Actually a leading role is played by the founder organizations, representing shipping, shipbuilding, boating and fishing.

5) Financial Position

The Federation is a non-profit organization, fully substained by its members. Because of its prevailing coordinating goals, normal contribution is restraint and in 2004 will attain 75.000 euro. Extraordinary fees can be decided by the Council and has been set in the occasion of the Maritime Economy Reports. Furthermore, Confitarma supplies the Federation with secretariat services, accounting for an amount comparable to the yearly balance of the Federation itself..

6) Government Involvement

No direct involvement of governmental bodies is set, but the Federation is in good terms with the Navy and the Coast Guard, that cannot adhere because of institutional reasons.

ACTIVITIES OF THE CLUSTER ORGANIZATION

1) In which broad themes is the organization active, e.g. Lobbying, Research, Communication, Export, etc.

The Federation has the aim of strengthening the representation of the maritime activities in order to address common problems, without replacing the single member organization. Its activity deal mainly therefore with research and communication.

2) What concrete projects have been realized on an annual basis within these themes.

The first outcome of the Federation was the Maritime Economy Report iissued in 1996 together with the Censis Foundation, one of the most well known research centers in Italy, and published in 1998. For the first time, the report gave the dimension of the social and economic impact of the maritime activity in Italy, pointing out the great importance of it.

The Second Maritime Economy Report followed in 2002, which pointed out updated figures of the maritime economy and included institutional activities besides the industrial ones. The aim

was to give an overall vision of the sea related activities, both in terms of economic and employment impact, including the non-industrial ones too. The research was based upon data available from the national accounting and relevant input – output tables, comparing year 2000 with year 1992.

Studies to set up an Environmental Report of Maritime Activities have started in 2003. Such a Report shall be completed in 2004.

Parallel activities were stimulated in the National Council for Economy and Labour (CNEL – Consiglio Nazionale dell’Economia e del Lavoro) by the Federation Secretary General, who represents there Confitarma, the shipowners association. Maritime transport in the Mediterranean Sea researches were accomplished on 1999 and 2003. Studies were realized in 2002 and 2003 regarding the vegetables and fruits transport chain and the role of shipping, as well as the wood and paper one.

3) Are there other maritime organization in your area dealing with specific subjects? Which and what.

Not important ones.

STRENGTH AND WEAKNESS, OPPORTUNITIES AND THREATS OF THE CLUSTER AND THE CLUSTER ORGANIZATION

Strength - A decisional centre, as the Ministry for Merchant Marine has been in the past, is missing since several years at governative level to elaborate a complete maritime policy. The competence distribution acted by the Ministry for Infrastructures and Transports does not seem to respond to the needs of operators. This institutional weakness may consent to the Federation to obtain greater spaces for coordination of the maritime interests it represents.

Weakness - Federate Organizations give priority to sectoral policies: this, although reasonable, however leads to undervalue the importance of unitary representation of the maritime problems.

OPPORTUNITIES FOR EXCHANGE AND CORPORATION

1) Between cluster organizations

It must be recommended that this 1st Maritime Cluster Organizations meeting does not remain a spot initiative, but starts a yearly habitude.

As European Organization of the national clusters could be considered the already existing Maritime Industrial Forum, with which therefore the relationship would be deepened.

2) Europe

The existing Clusters should promote the creation of similar bodies in all the European Union member countries. This should consent to represent to Institutions the actual importance of maritime system for the EU economy.