



## THE ITALIAN MARITIME CLUSTER

*October 2018*

In a country like Italy, lacking in raw materials but with a strong industry and important tourism activity, the maritime system has a direct impact on the economy. This is well shown by the social and economic importance of coastal cities and islands, that positively influenced the Country and whose development would have been impossible without the presence of intense maritime activity.

Even though the Country has gone through a long period of crisis, the Italian maritime cluster is still one of the most dynamic sectors of the national economy and currently produces 33 billion euro per year, which is 2% of the national GDP (3.5%, if considering only private activities) providing work, directly or indirectly, for around half a million employees.

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In twenty years the size of the production and employment of maritime activities has changed: from a production of 21 billion euro it has gone to almost 33 billion; employment has grown from 120,000 direct and 190,000 indirect employees in 170,000 and 300,000 respectively. It has been a growth of 55%, although slowed by the long economic and financial crisis, which has obviously very heavily hit activities deeply integrated in the world trade.

Italy has primarily a transformation economy, where raw materials arrive from outside (mostly from other continents) to be processed here in semi-finished and finished products and then sold on other markets in Europe and worldwide. And it has also an economy where domestic and international tourism plays and will play in development an increasingly key role.

Shipping is the fulcrum around which the maritime economy keeps turning. Considering the range of activities dedicated to it - not just maritime transport, but also shipbuilding and port activities (with all the functions related to it, administration, agency and maritime brokerage, logistics, handling and storage, certification and insurance, technical-nautical services, etc.) - the annual production is now more than 22 billion Euro, with direct employment of 84,000 employees and other 170,000 in connected industries. Then add leisure boating, with 4.5 billion Euro contribution to GDP and a total employment of 97,000 people, fishery (4.8 billion Euro and 56,000 employees), the Institutional maritime activities (4.5 billion Euro and 64,000 employees) .

Today the Italian flag fleet is among the largest ones in the world (3/4<sup>^</sup> of the major countries, gathered in the G20) and exceeds 16 million gross tons, with leading positions in the most sophisticated sectors (ro-ro vessels, cruise ships, tankers for chemical products). Our country holds the European leadership in the cruise traffic (with 6.2 million passengers and 4,600 port calls), and the World one in the construction of passenger ships and luxury motor-yacht. Instead, the data confirm the shift of the Italian port system from the 1st to 3rd place in imports and exports of goods by sea in Europe, with 215 million tons.

The impact of maritime activities on the Italian economy goes beyond the aspects most closely related to transport services and directly involves even manufacturing and tertiary economy. The industrial maritime cluster annually spends nearly 20 billion Euro in purchases of goods and services (oil refining; chartering; leasing, financial assets and insurance; logistics; metal and metallurgical products; wholesale commercial distribution; vessels, naval components and other means of transport; legal, accounting, architecture and engineering services; food and beverages; mechanical and electrical products; computer and related services; supervisory and support services to the offices; real estate activities; travel agencies; building; chemical products; telecommunications, furniture and other manufactures; plastic products, etc). In distribution costs, mostly in restaurants and food processing, go almost 2 billion Euro. Then there is the great chapter of purchases in goods and services made by yacht owners and cruise passengers outside the maritime sector, valued at over 2 billion Euro.

Accordingly, we have a high multiplier both for income (equal to 2.63) and for employment (equal to 2.77): 1000 Euro of increase in income in the maritime *cluster* activates about 2630 Euro of National income and 1000 new jobs in the maritime sector units activate 2770 units nationwide.

Maritime transport is the sector which, compared to labor productivity, ranks first in the cluster (339,000 Euro/employee). Follow at a distance the other segments of the industrial maritime cluster: shipyards (280,000 Euro/worker) and the shipbuilding industry as a whole (233,000 Euro/employee); then leisure boating, auxiliary and port logistic services, with similar production values for employee (about 200,000 Euro/employee).

A significant measure of the competitive position currently taken by the national maritime cluster can be represented by the value added per unit of work that, for the maritime industry and tertiary activities, stand at 68,300 Euro per year. It is a value that places the maritime cluster in a more advanced position than building, commerce and many major sectors of the 'Made in Italy' production, including food.

Overall, the economic activities of the Italian maritime cluster occupy an important *niche* in the domestic landscape, lower by value of production than significant and pervasive activities such as agriculture or textiles manufacturing, but superior to consolidated sectors such as pharmaceuticals one or insurance activity.



THE *FEDERAZIONE DEL MARE*

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## THE FEDERAZIONE DEL MARE

*Founded in May 1994, the Federazione del Mare – Italian Maritime Cluster today brings together a large part of the maritime organisations – AIDIM (maritime law), AIMM (merchant marine training), ANCIP (port-operators), ANIA (insurance), ASSONAVE (shipbuilding), ASSOPORTI (port administration), ASSORIMORCHIATORI (port towage), CETENA (naval research), COLLEGIO CAPITANI (maritime staff), CONFITARMA (merchant shipping), FEDERAGENTI (maritime agency and brokerage), FEDEPILOTI (port pilotage), FEDERPESCA (fishing navigation), FEDESPEDI (international shipment), INAIL/Maritime Sector (maritime welfare), RINA (certification and classification) and UCINA (leisure-boating industry) – with the purpose of representing the maritime world in a unified manner, so as to increase awareness of the its role as a factor of development, while highlighting its shared values, culture and interests, which also arise from constant contact with international activities.*

*The Federazione del Mare is headquartered in Rome and governed by a Board composed of Presidents, Vice-Presidents or Delegates representing the member Organisations, and of their Directors or Secretaries General.*

*President is Mario Mattioli; Vice-Presidents Umberto Masucci, Vincenzo Petrone, Anton Francesco Albertoni; Past-President Paolo d’Amico; Secretary General Carlo Lombardi; Vice-Secretaries General Francesco Mariani, Laurence Martin, Marina Stella.*

## **MEMORANDUM OF AGREEMENT**

*approved on 4 May 1994 and supplemented with subsequent amendments*

### ESTABLISHMENT OF THE FEDERAZIONE DEL MARE

On the 4<sup>th</sup> day of the month of May in the year 1994

BETWEEN

.....omitted.....

WHEREAS

the importance of the maritime cluster for the purposes of development is increasing as a result of the growing internationalisation of markets, to the point where it represents a factor of strategic importance for the member nations of the European Union, in consideration of the leading role it plays in world trade;

in Italy the maritime cluster has an especially critical function, given the elevated dependence of the transformation industry on foreign markets, as well as the extensive coastal and island areas of Italian territory, plus the major civil and economic role of seaside cities and towns;

elements of interdependence and synergy exist between the different components of the maritime cluster, especially as regards the fundamental areas of the shipbuilding industry, navigation, port activities, fishing and pleasure boating;

## CONSIDERING

that, in Italy, the importance of the maritime cluster would not appear to be adequately represented before the various institutional organs, in part because of the numerous organisations representing specific segments of the industry;

that, within the current process of political and administrative transformation, it appears all the more necessary that the maritime cluster be given a unified form of representation, in order to draw the attention of society as a whole to its relevance as a factor of development while favouring the formulation of a policy geared towards promoting the competitiveness of both the cluster as a whole and its component parts;

that the European Union, with the establishment of the “Forum of Maritime Industries” on the part of the European Commission, has set out to achieve innovations in the reference framework of the maritime cluster, in the interests of gaining a better understanding of its needs while providing it with policies adequate to the relevance of its role in the development of the European economy;

## IN LIGHT OF AND CONSIDERING ALL THE ABOVE, THE FOLLOWING POINTS ARE AGREED TO

1. The aforementioned organisations establish the *Federazione del Mare*, Italian Maritime Cluster, headquartered in Rome.

.....omitted.....

## MEMBER ORGANISATIONS

AIDIM, *the Associazione italiana di diritto marittimo (Italian Association of Maritime Law), performs tasks contributing to the unification of maritime law, as well as customs and practices in the industry, assigned to the Comité Marine International (CMI), of which it is the Italian chapter.*  
([www.aidim.org](http://www.aidim.org))

AIMM, *the Accademia italiana della marina mercantile (Italian Merchant Marine Academy) Foundation works for the training of cadets intended for the higher positions in shipping (in particular the Officers) and promotes research and training innovation, in close synergy with public and private Institutions. The International Academy section is affiliated to IMSSEA (International Safety, Security & Environment Academy), through an agreement between the Ministry for Foreign Affairs and the IMO (International Maritime Organization).*  
([www.accademiamarinamercantile.it](http://www.accademiamarinamercantile.it))

ANCIP, *the Associazione nazionale compagnie imprese portuali (National Association of port labour companies) was born in 1993 to manage the new situation arising in Italian ports with their reform as stated afterwards in Law n. 84 of 1994. The Association is aimed at representing its member companies, promoting development and increase in commercial maritime trading, organising study and research activities regarding economical, juridical and social aspects.*  
([www.ancip.it](http://www.ancip.it))

ANIA, *the Associazione Nazionale delle imprese di assicurazione (National Association of Insurance Companies) has as its main objective to safeguard the interests of the sector, linking them to the more general interests of the country. It also represents maritime insurance companies.*  
([www.ania.it](http://www.ania.it))

ASSONAVE, *the Associazione nazionale dell'industria navalmeccanica (National Association of Shipbuilding and related Industries), represents the companies that build and repair ships and engine assemblies, as well as the CETENA Naval Research Centre. There are thirty-six member companies that participate either directly or G.RI.NAV. (Naval Repairers Group). An additional one hundred and six companies that supply the shipbuilding industry also take part in the activities of Assonave as adherent members.*  
([www.assonave.it](http://www.assonave.it))

ASSOPORTI, *the Associazione porti italiani (Association of Italian Ports), brings together port authorities and non-economic public bodies to which the State has assigned, under the law, the management of Italy's leading ports. The membership also includes chambers of commerce, industry, crafts and agriculture in the province where ports are found, plus their specialised port enterprises, along with the Union of Chambers of Commerce. A total of more than thirty commercial ports are members.*  
([www.assoporti.it](http://www.assoporti.it))

ASSORIMORCHIATORI, *the Associazione italiana armatori di rimorchiatori (Italian Association of Tugboat Owners), brings together shipowning enterprises that hold the government authorisations for towing services in more than twenty-five ports.*  
[www.assorimorchiatori.it](http://www.assorimorchiatori.it)

CETENA, *the Centro per gli studi di tecnica navale (Italian Ship Research Centre), is a company of the Fincantieri Group dedicated to research and consultancy in the naval and maritime field. Since its foundation in 1962, CETENA has been involved in national and international research activities and has carried out research and consultancy in close cooperation with shipbuilders, shipowners, navies and universities.*  
[www.cetena.it](http://www.cetena.it)

COLLEGIO CAPITANI, *the Collegio nazionale capitani di lungo corso e di macchina (National Council of Long-Haul and Engine-Room Captains) is the professional association for Merchant Marine officers. A legally recognised body founded in 1946, it is present in all of Italy's major maritime centres, with two districts and forty chapters, assisting its members, safeguarding their professional prestige and organising training activities in the maritime sector.*  
[www.collegionazcapitani.it](http://www.collegionazcapitani.it)

CONFITARMA, *the Confederazione italiana armatori (Italian Shipowners Association), represents the Italian shipping industry, bringing together approximately one hundred and seventy shipowning enterprises and groups that operate through more than two hundred and twenty navigation companies active in all sectors of cargo and passenger transport, as well as auxiliary shipping services. In addition to shipowners, Confitarma has associate members that include Italian and foreign authorities, associations and enterprises whose activities are linked to the shipping industry.*  
[www.confitarma.it](http://www.confitarma.it)

FEDERAGENTI, *the Federazione nazionale agenti marittimi raccomandatori, agenti aerei e mediatori marittimi (National Federation of Registered Maritime Agents, Air Agents and Maritime Brokers), is the lone Italian organisation in the sector. Twenty-five associations covering all Italian ports are members of the Federation. At present, the companies registered with the member associations of the Federation number six hundred and twenty-five, meaning almost all the maritime agencies, air agencies and maritime brokers operating in the sector nationally.*  
[www.federagenti.it](http://www.federagenti.it)

FEDEPILOTI, *the Federazione italiana piloti dei porti (Italian Federation of port Pilots), brings together the pilots of thirty-nine national ports that have pilot units. Sailors authorised to serve as pilots in twenty-one other ports are also members.*  
[www.fedepiloti.it](http://www.fedepiloti.it)

FEDERPESCA, *the Federazione nazionale delle imprese di pesca (National Federation of Fishing Enterprises), is the lone organisation representing enterprises in the sector. Founded in 1961, the members of Federpesca include more than one thousand, nine hundred maritime fishing enterprises, eleven manufacturers of fishing nets and thirty-two industrial concerns active in preservation, in support of the fishing enterprises: association members account for a total of almost two thousand, five hundred fishing boats that range in size from 10 to 2,300 grt.*

[www.federpesca.it](http://www.federpesca.it)

FEDESPEDI, *the Federazione nazionale delle imprese di spedizioni internazionali (National Federation of International Shipment Enterprises), represents two thousand and two hundred enterprises organizing the shipment of commodities using all transport modes, included the maritime one, and having therefore a strategic role in the logistic system, with a natural vocation for the internationalization of the markets. Fedespedi is present on the whole national territory through thirty associations.*

[www.fedespedi.it](http://www.fedespedi.it)

INAIL, *the Istituto nazionale per l'assicurazione contro gli infortuni sul lavoro, (National Institute for Assistance against Labour Accidents) in July 2010 has incorporated IPSEMA, the Istituto di previdenza per il settore marittimo (Providence Institute for the Maritime Sector), founded in 1994 to replace the previous maritime providence funds, having been assigned the same tasks regarding obligatory insurance against work-related injuries and illnesses, as well as social-security services involving illness and maternity on the part of personnel engaged in maritime and air navigation.*

[www.inail.it](http://www.inail.it)

*The Registro italiano navale (Italian Naval Register), founded in 1861, is a non-profit private-law entity which, in addition to having full control of RINA SpA, to which it has delegated its operating activities, is primarily engaged in promoting the safeguarding of human life, property and the environment.*

*RINA SpA is the leading company of the RINA Group, an independent organisation present on the international scene since 1861, active in the sectors of naval classification, system and product certification, services for industry, training and research, and has offices in more than seventy locations throughout the world.*

[www.rina.org](http://www.rina.org)

UCINA, *the Unione nazionale cantieri industrie nautiche e affini (National Union of Shipyards, Nautical Enterprises and Similar Concerns), represents four hundred companies and organisations of companies active in the leisure-boating industry, or that manufacture or market leisure boats and supply related services.*

[www.ucina.net](http://www.ucina.net)

## **PUBLICATIONS**

### ***Maritime Economy Report***

*The socio-economic impact of the activities of maritime enterprises  
on the development of the country*

1998, Franco Angeli, Milan  
in collaboration with Censis  
(available only in Italian)

### ***The Second Maritime Economy Report***

*The economic and employment impact  
of the Italian maritime cluster*

2002, Franco Angeli, Milan  
in collaboration with Censis  
(available in Italian and English)

### ***Maritime Economy for the Environment.***

*Best-practices of the Italian maritime cluster in  
environmental protection*

2004, Franco Angeli, Milan  
in collaboration with Rina SpA  
(available only in Italian)

### ***The Third Maritime Economy Report***

*Economic growth, human capital and defence of the environment in  
the Italian maritime cluster*

*Under the Distinguished Patronage of the President of the Republic*

2006, Franco Angeli, Milan  
in collaboration with Censis  
(available in Italian, English abstract)

### ***Human Resources in the Development of the Maritime Cluster***

2007, Franco Angeli, Milan  
in collaboration with UPI – *Unione Province d'Italia* and ISFORT  
(available only in Italian)

***Mediterranean: the Upcoming Future***

*Recommencement of the re-composition process following the global crisis  
2009, Censis, Roma  
on the occasion of the European Maritime Day  
(available in Italian and English)*

***The Fourth Maritime Economy Report***

*Maritime cluster and development in Italy and its Regions  
Under the High Patronage of the President of the Republic  
2011, Franco Angeli, Milan  
in collaboration with Censis  
(available in Italian, English abstract)*

***Feeding the Planet: the Maritime Economy Contribution***

*2015, Rome  
(on the occasion of EXPO Milano 2015)  
in collaboration with D'Appolonia and Censis  
(available in English, Italian abstract)*

***The Fifth Maritime Economy Report***

*Maritime cluster and development in Italy  
Medal of the President of the Republic  
2015, Rome  
in collaboration with Censis  
(available in Italian, English abstract)*

coming out soon

***Fifty Years of Maritime Activities in Italy: Evolution and Perspectives***

*Studies on the occasion of the 50th Anniversary  
of Censis Report on Italian Society*