



Shipbuilding & Boating Competence Centre

10 Juli 2007 – San Daniele del Friuli (UD)
Raphaela Guty – AREA Science Park

Shipbuilding & Boating Competence Centre

The **Shipbuilding & Boating** Innovation Network Competence Centre is based in the Monfalcone Industrial Zone and operates in collaboration with the Consortium for the Industrial development of Monfalcone, which supports the initiative.

It offers businesses assistance and services to help balance supply and demand in innovation within the sector of subcontracting for the naval and pleasure boat industries. In particular, the Shipbuilding and Pleasure Boating Competence Centre provides support in:

- adopting innovative production technology
- using new materials
- introducing advanced instruments for designing sails and hulls
- studying new strategies for business development

Some of the topics dealt with:

- The use of wind generators on craft
- Search for new materials for pleasure boat decks
- Retractable propulsion systems
- The use of renewable sources for electricity production on pleasure boats
- An innovative, space-saving propeller system
- Propellers with adjustable blades
- A fibre-orientation system for the production of carbon composites
- Support in creating a new type of wooden craft
- Search for alternative materials for interiors and interior walls

Sectorial and multiclient studies

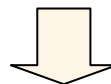
Need

Finding out needs and useful informations for the growth of boating and shipbuilding industries

The offer of AREA

Sector study: shipbuilding and boating industry in Friuli Venezia Giulia

In order to know better



- features of two sectors
- integration among territorial elements of the system and business relationships among enterprises

The study

The first complete scientific research about shipbuilding and boating industry of Friuli Venezia Giulia

Andrea Tracogna

I CLUSTER DEL MARE

**Nautica da diporto e
cantieristica navale in
Friuli Venezia Giulia**

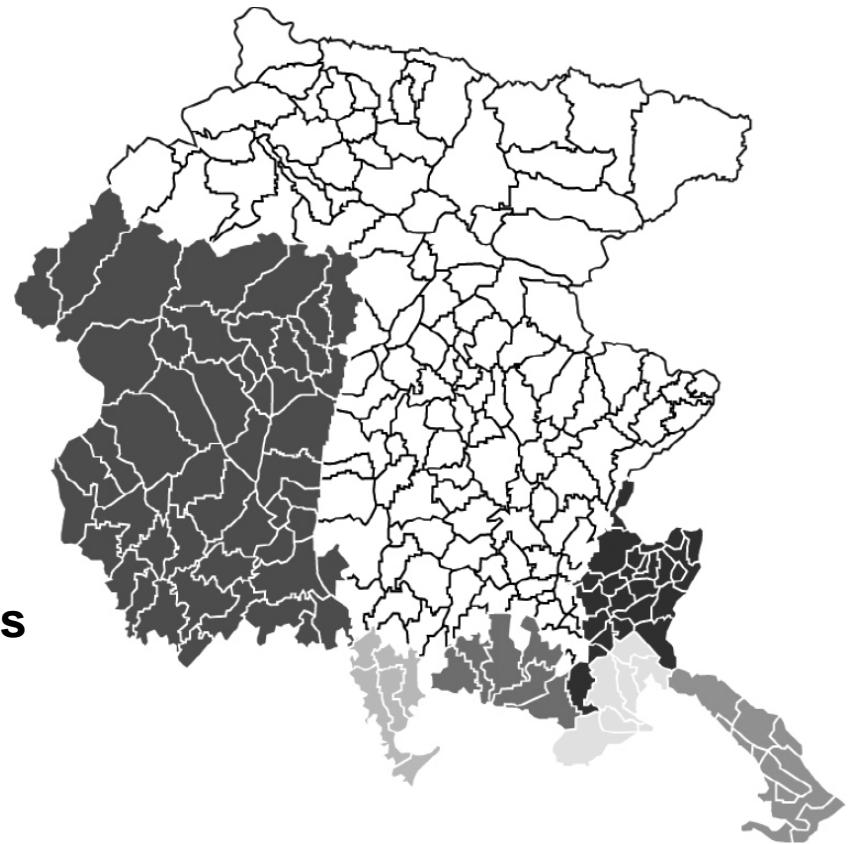
FrancoAngeli

Boating Industry in FVG

From demand to manufacture	168	Broker, shipyard, design, hull manufacturing, fixtures, painting, filling, furniture, tapestry, fitting out, engines, sails makers, navigation instruments
Sailing	161	Steamship agents, charter, bunkering, wholesale, sellers
Refitting and storage	64	Maintenance, repair and storage services
Other activities	8	
TOTAL	401	

Boating sites in FVG

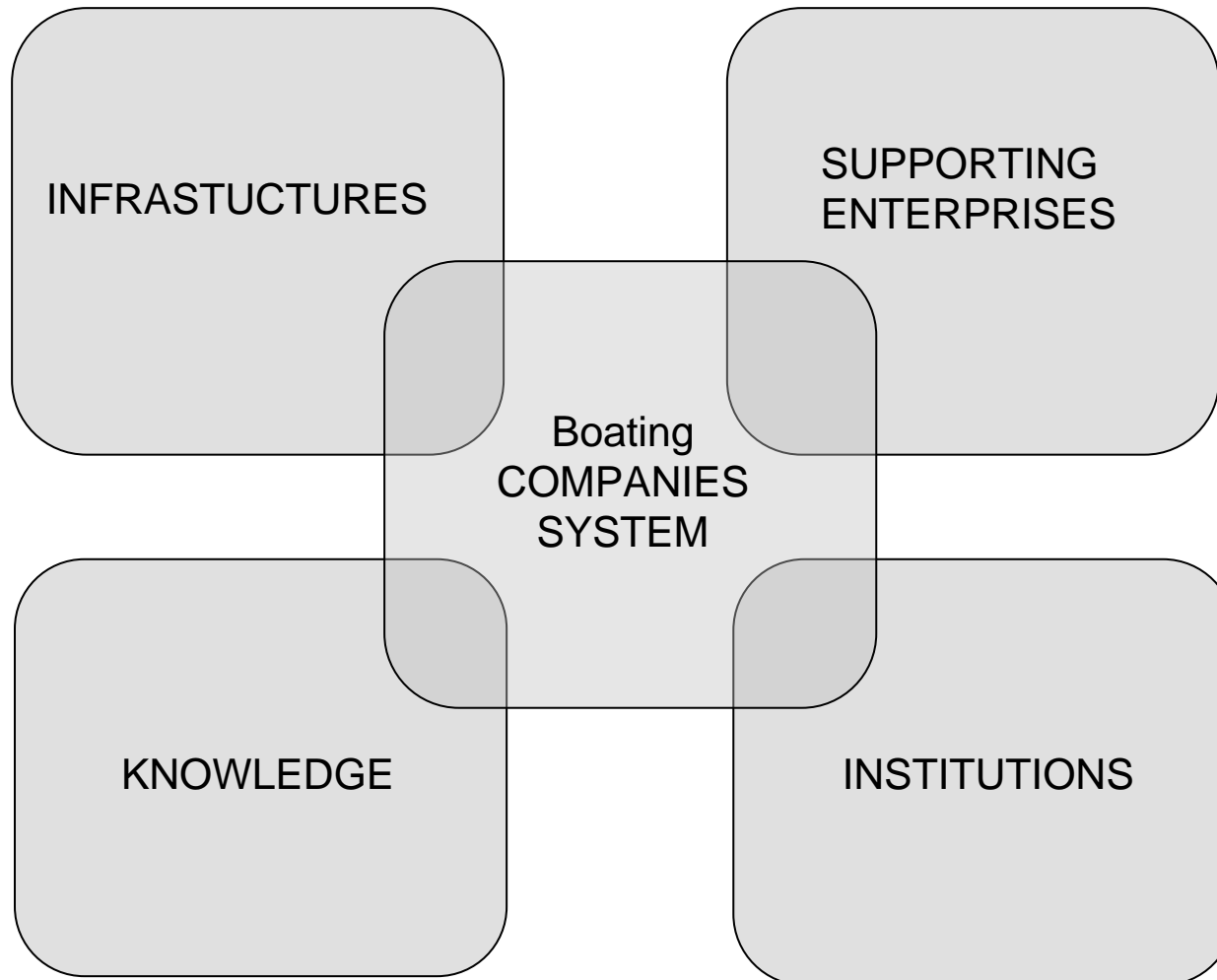
- Trieste and its Gulf: 139 enterprises**
- Monfalcone & Grado: 69 enterprises**
- Aussa-Corno: 33 enterprises**
- Latisana & Lignano: 101 enterprises**
- Gorizia and province: 14 enterprises**
- Udine and province : 28 enterprises**
- Pordenone and province : 17 enterprises**



Boating industry in FVG

Enterprises	401
Employees per enterprise	4.5
Total number of employees in enterprises	1,800
Medium sales per employee	€ 90,000
Total yearly sales (enterp.)	€ 160 mil
Employees in marinas and tourist infrastructures	200-250
Sales of marinas and tourist infrastructures	€ 25 mil
Total number of Boating employees in FVG	2,000
Total yearly sales in FVG	€ 185 mil

Boating cluster of FVG



Cluster major features

- Young entrepreneurs with high birth-rate
- High integration with **marinas and tourist infrastructures system**
- Greater number of Boating services companies
- High ratio of small and medium enterprises, artisanship
- Focus on customizing, design, quality; not so much on technology
- Craftsmanship hard to find
- Industry growth “demand-based”
- Slight integration among territorial elements of the system
- Few synergies with shipbuilding industry
- No leader enterprises

Outlook into the future

Opportunities:

- **Possibility of increasing the size of infrastructures (greater boats and related enterprises)**
- **Availability of new sites**
- **Attraction of investments from outside the cluster**

Strategies for Boating Industry in FVG

- **Strengthening and aggregation of entrepreneurs**
- **Competitive differentiation**
- **Foster innovation both technology and organization**
- **Preservation of quality professions through continuous training of human resources**

Naval leader in Italy: Fincantieri



- 2 naval design centres
- 8 factory
- 1 division of machines productions
- 1 repairing division
- 1 naval research centre
- 1 company wich manufactures diesel engine

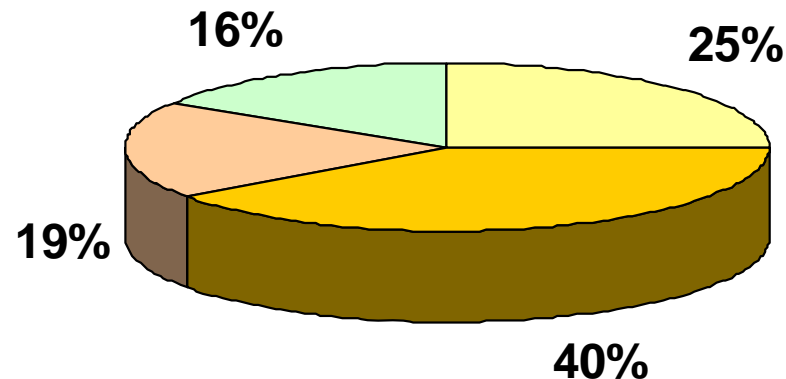
Fincantieri employs 9,300 persons directly and more than 10,000 persons indirectly

Fincantieri in FVG

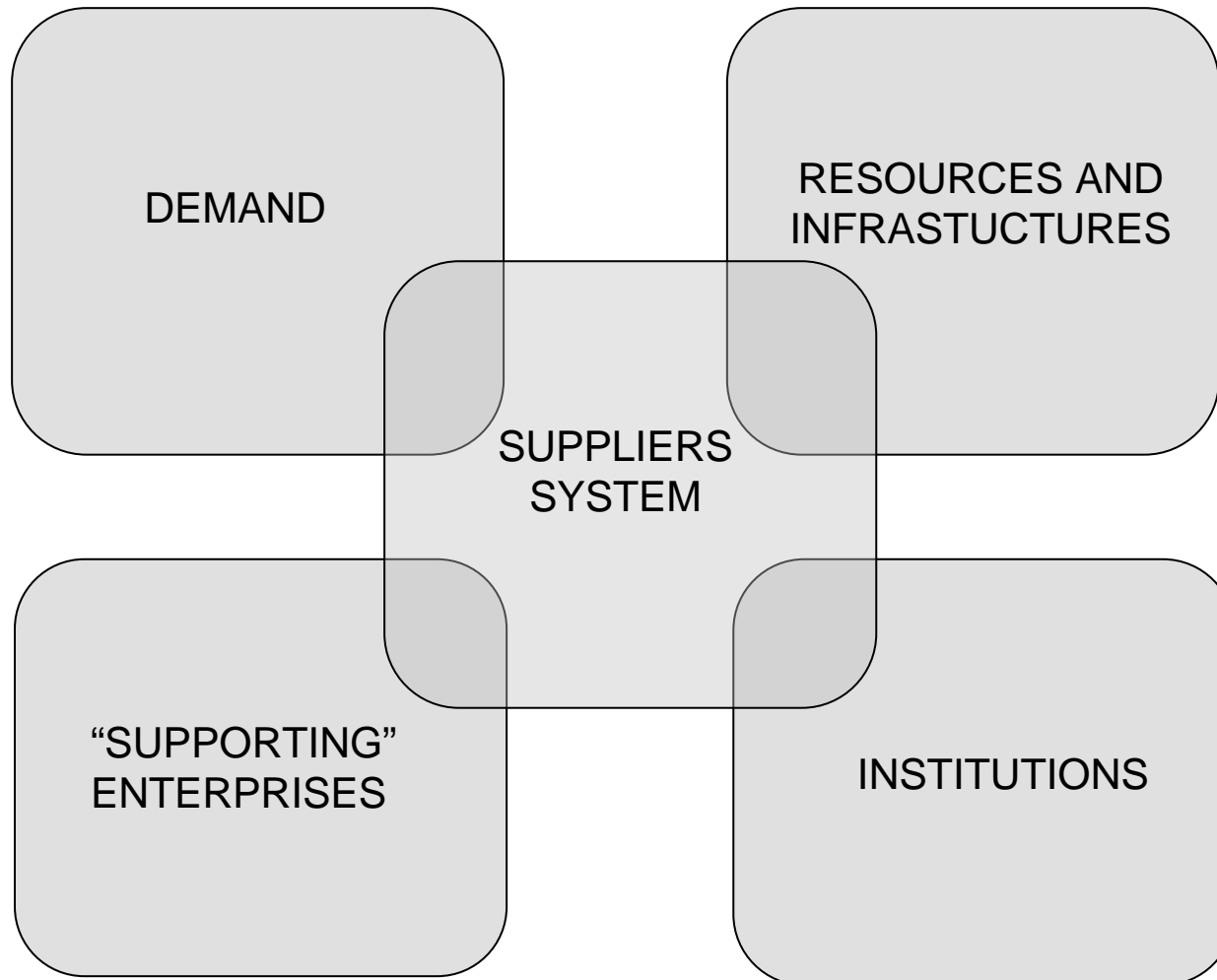
2700 employees in:

- the greatest italian naval design centre (600 employees)
- the greatest dockyard of the company: Monfalcone (1800 employees)

550 suppliers



Naval industry cluster



Naval industry cluster

Profile	<p>11 < employees < 30 1 < sales < 5 mil € (even extra-naval) Many born in 90's</p>
Entrepreneurs	<p>Older than boating entrepreneurs Good school level First generation</p>
Human resources	<p>Also from non-UE workers Sub-supplier</p>
Customers and relationship with Fincantieri	<p>70% of sales to Fincantieri</p>
Value chain	<p>Co-design Lacking of sales organization Difficult promotion of activities</p>

Outlook into the future

Opportunities:

- **Possibility for suppliers to become “main contractors”**
- **Growing demand of repairing**
- **Differentiation in other “land” sectors**
- **Opportunity of synergies with boating industry (mega-yachts)**

Boating and naval FVG industry

Number of employees

Boating cluster of FVG	2000
Naval industry cluster	4400

Total number of employees

6400

Number of enterprises

Boating cluster of FVG	401
Naval industry cluster	550
Fincantieri	1

Total number of enterprises

952

Naval and Boating Technology District

The Naval Technology District (**DITENAVE**) is a FVG Region project to support the development of the naval and boating industries.

Target: network together know-how and interests of

- ✓ big industry
- ✓ scientific institutions
- ✓ SME's

Naval and Boating Technological District

TARGET COMPANIES

Naval suppliers

Businesses in the boating sector

New spin-off companies

PARTNERS

Regione Friuli Venezia Giulia

AREA Science Park

Fincantieri

Confindustria Regionale

Friulia

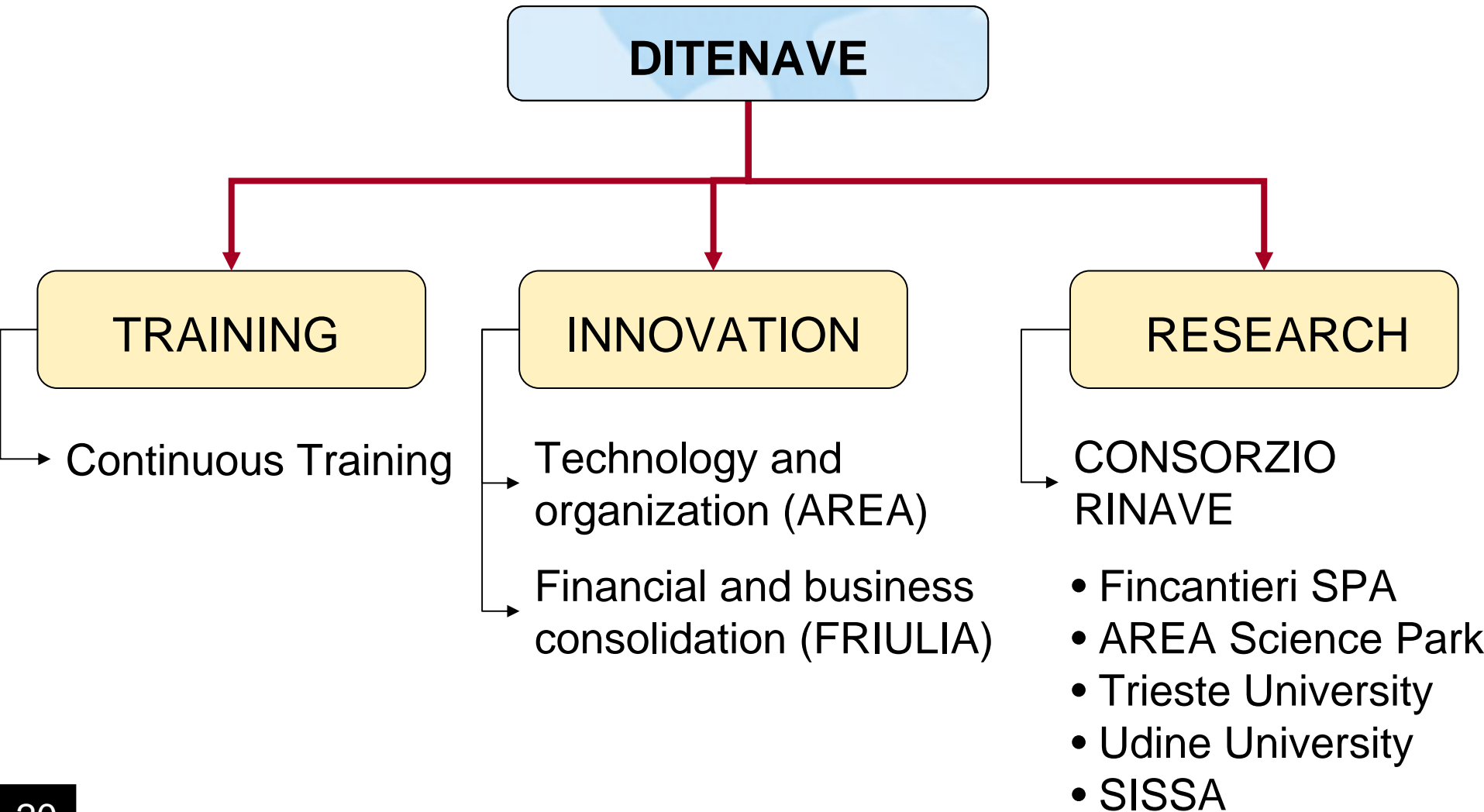
AREAS OF DEVELOPMENT

Cutting-edge naval research

Innovation and technology transfer

Training

Naval and Boating Technological District



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For further information contact:

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