

Regional report on small ports phenomenon in the Friuli-Venezia Giulia Region

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1. Introduction

FRAMESPORT project will perform a coordinated initiative supporting an integrated and sustainable development of small ports in a strategic perspective, thus allowing them to be pro-active socio-economic drivers of the development in the Adriatic coasts. Such a strategic objective calls for a multifaceted approach, including both the adoption of concrete pilot actions as well as the identification of priority themes to be promoted within the overall strategy. Priorities will be individuated by means of a bottom-up approach, involving local and national stakeholders since the project inception phase. Partners, which have been chosen in order to guarantee a wide territorial approach, will address planning and management topics, business models implementation, enhancement of training and competence, as well as develop ICT tools and services, thus supporting an effective development of small ports in the whole IT-HR area.

Furthermore, a tailor-made ICT platform will collect and systematise relevant key data on small ports to be shared as starting point of any further development. FRAMESPORT will build on existing knowledge and capitalise results of pilot initiatives by integrating them in a new strategic framework boosting small-scale maritime nodes performances along the Adriatic coasts.

1.1. Purpose of the document

The purpose of this document is to explain the capabilities and possibilities of the coastal area, and related structures, of the Friuli Venezia Giulia region. This analysis has the aim to present relevant information on the existing facilities and characteristics and services of the small ports.

2. The region in a nutshell

Friuli Venezia Giulia	
Area	7.924,36 km ²
Population	1.197.392 ab
Population density (per km ²)	151,1 ab/km ²
Official languages	Italian, Sloven, German

The Friuli Venezia Giulia region has always been a crossroads of peoples, trade, and communications.

The port of Trieste has been for a long time a free port and from the city and the port goods were forwarded without duty, free to travel without paying taxes. This characteristic, maintained until the collapse of the Austro-Hungarian Empire after the end of the First World War, led the coastal area of the region to be home to great commercial and industrial growth: many shipyards were born at the beginning of the '900, including the Cantiere Navale Triestino, property of the Cosulich brothers, today Fincantieri, these shipyards were born for the construction of passenger and merchant ships.



To connect the coastal activities, important land communication facilities were built, of particular importance the construction of the southern railway line (1850 - Sudbahn) that connected the coast within the central European territory.

Even today, the consequences of these political, industrial and commercial choices make the coastal area of Friuli Venezia Giulia one of the most active areas in trade and transport by sea.

2.1. Socio-economic description of the region/county

The FVG economy slowed by 8.9% in 2020, on a par with the Italian average. At current values, regional GDP is estimated, at the end of last year, at 35.8 billion euros, with a loss of 2.9 billion compared to a year earlier.

Household consumption, because of the restrictive measures, the struggling labor market and the climate of uncertainty that favors saving, also recorded a collapse in FVG, equal to -11.6%, corresponding to a loss of 2.8 billion euros. The decline in regional added value estimated for 2020 is substantially in line with the national average trend (-8.7%). The industrial sector lost 11.3% in FVG, construction 6.9%. Huge losses are recorded also in the services sector, the sector was the most affected by the restrictive measures adopted to contain the epidemic: -7.9. For agriculture, a fall in added value is estimated of about 5.2%.

Forecasts

In 2021 the FVG will be one of the Italian regions that will record the highest growth, equal to +5.2%, and for 2022 an increase of 4.5% is expected, still higher than the national average, which will allow the regional economy to return to the pre-pandemic levels. The FVG will be the Italian region with the largest increase in household consumption expenditure, +4.4%, followed by a more substantial recovery, equal to 6.1%, in 2022; however, private consumption, after the collapse recorded in 2020, will not return to pre-crisis levels before 2023. Gross fixed capital formation will recover sharply, amounting to 12.6%, exceeding the 2019 values already this year; during 2022, investments will increase by a further 8.4%, benefiting from the consolidation of the recovery and the availability of European funds. On the foreign trade front, in 2021 there will be a full recovery in exports, thanks to a growth of 11.1%.

Regional added value will recover with an increase above the national average both in 2021 (+5.3% against +4.7%) and in 2022 (+4.5% against +4.3%). The industrial sector will recover increasing the 9.4% in 2021 and the 3.9% in 2022. The construction sector, with an increase of 11.8%, will be the only sector to exceed the pre-Covid added value already in the current year and very good results are expected also for 2022 (+7.1%). In the services industry, the sector most affected by the pandemic, the recovery will be slower, with a +3.6% in 2021 and a +4.6% in 2022, and only in 2023 the losses of 2020 will be fully recovered. For agricultural sector, it is still estimated a decrease in

added value for the current year, equal to a -1.4%, and a increase of +2.3% is forecasted in 2022. On the employment front, the recovery of lost job positions is estimated to be slower, during 2021 the work units will increase in all sectors but only in industry, with a + 7.1%, the pre-crisis levels will be exceeded.

The disposable income of households in the next three years will evolve substantially in line with the national average: it will recover 2.7% in the current year, increase by 1.5% in 2022 and 1.4% in 2023.

DATA from FVG Macroeconomic Trends Giugno 2021 – Regione FVG ([tendenze macroeconomiche giu2021 \(regione.fvg.it\)](#))

2.2. Regional transport and mobility overview and main features

Regional transport and mobility are represented by the presence of various infrastructures of national importance: highways, airport, and railways.

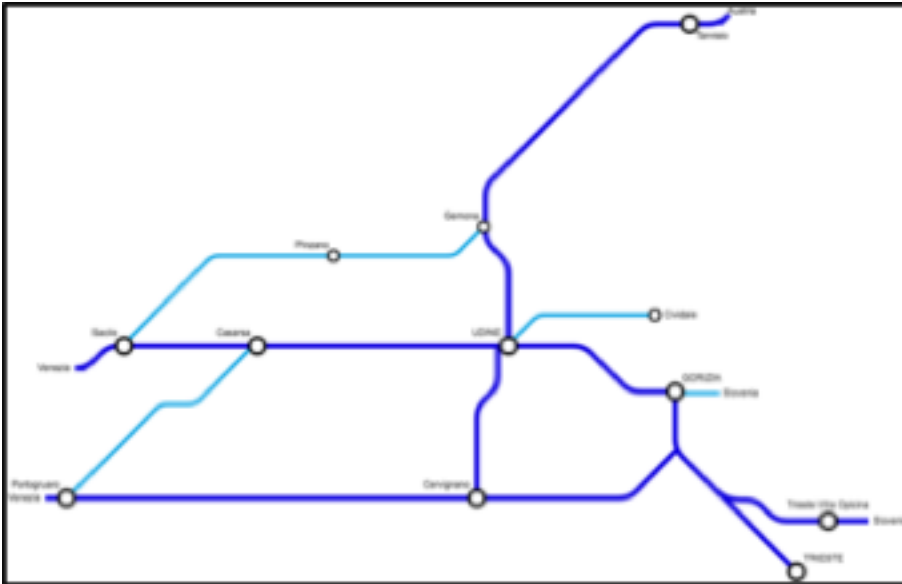
In the region there is the motorway connection of the A4 – Venice Trieste, the final part of the line that crosses the entire Po Valley from west to east starting from Turin. This line is the basis of the main connections with the other Italian motorways (towards the Centre and South of the country) and the junctions with the Austrian and Slovenian motorways, an element that contributes to the movement of goods towards the coast and towards Central-Eastern Europe.

The regional airport Trieste Airport, operational since 1961, has brought a further important element of connection for the territory. The structure consists of an intermodal hub in which in a single area there is the presence of the airport, a railway station and a bus station with local, regional and international connections. The presence in the region of an airport area allows the growth of the region, with a view to expanding the air radius (currently limited to the closest Italian and European regions).

The Friuli-Venezia Giulia railway network has 466 km of lines with 17 main stations. The region is crossed by two important international routes: the Adriatic route (Austria – southern Italy) and the east-west route (Barcelona – Po Valley – Trieste – Ljubljana – Budapest – Kiev).

The connection of the railway network is managed by the Italian Railway Network. The regional passenger service is carried out by Trenitalia. The fast service (maximum speed reachable 150 km / h) is entrusted to Trenitalia and Italo. Fundamental is the connection with the line to Venice,

connected in two ways: highline Venice – Udine – Trieste and low line Venice – Latisana – Trieste. These connections have recently been increased with connections with the Austrian and Slovenian networks.



2.3. Overall governance and transport planning references

In general, the transport situation at regional level is good and constantly developing. The mainland and sea connection lines fall under the national governance that plans for changes and modifications. The local transportation system is supervised and regulated from the Friuli Venezia-Giulia administration.

3. Analysis of regional ports phenomenon

From the questionnaires carried out, positive results were obtained that represent the situation of the small sailing and nautical centers of the Monfalcone territory. A dozen small centres representing both marinas and sports associations along the coastal area were examined.

3.1. Overall description of available infrastructures (position, visualisation, berth details and capacities, hinterland connection)

The different sailing centers are mainly divided into two areas: the coastal area of Marina Nova and Lido di Panzano (sailing centers and sports clubs) and Canale Est – Ovest in the Lisert area (where the marinas and shipyards develop).

The following technical data relating to the moorings are recorded:

	OCEAN MARINE	LNI	CRACK BOAT	NAUTEC	Marine International
Maximum draft for mooring in meters	8 m	8 m	2.70 m	4 m	9 m
Maximum height of boats in meters	4 m	/	1.5v m	6 m	None
Maximum length of boats in meters	22 m	18 m	13 m	20 m	32 m
Maximum tone of vessels in tones (equivalent to 100 cubic feet or 2.83 cubic meters)	48 t	/	16 t	60 t	100 t
Minimum depth of the seabed in meters	2.40 m	2 m	3 m	3 m	2.70 m
Mouth of the port in meters	3 m	10 m	2.5 m	6 m	9 m
Total area (in mq including all the services present) on which develop the port	35.000 mq	25.000 mq	1.600 mq	23.000 mq	6.0000 mq

Dimensions	2,5 m x 7,0 m	3,0 m x 8,5 m	3,5m x 10,0 m	4,0m x 11,5 m	4,5m x 13,0 m	5,5m x 18,0 m	6,0m x 21,0 m	6,5m x 24,0 m	7,0m x 28,0 m	7,5m x 32,0 m	8,0m x 36,0 m
Number of berths	77	83	85	80	131	118	99	2	0	1	0

Technical data relating to connections with the hinterland:

	OCEAN MARINE	LNI	CRACK BOAT	NAUTEC	Marine International
Infrastructure connections (in km):					
Railway station	4	4	4	5	3
Airport	10	10	5	10	50
Bus station	4	Not available	2	1	7
Bus stop	4	5	1	1	0,5
Tram station	Not available	Not available	Not available	Not available	Not available
Tram stop	Not available	Not available	Not available	Not available	Not available
Highway	5	3	6	12	1
Links to law enforcement facilities:0					
Fire brigade	3	3	3	5	1
Carabinieri station	3	3	3	5	2
Police command	3	3	3	5	1
Is the port a customs gate that carries out passport control?	No	No	No	No	No
Indicate the distance in km from the nearest	5	5	4	5	3

emergency room/hospital:					
How long does it take to reach the first useful intervention point?					
By car (min)	5	5	5	5	5
On foot (min)	15	15	20	15	15
Is there a helicopter rescue service?	No	No	No	No	No
Are there defibrillators in the port?	No	Yes	Yes	Yes	Yes
Are there fuel distribution systems?	No	No	No	No	No

3.2. Overall description of available services for users (technical services, nautical services, waste collection, touristic services)

The different sailing and nautical centers have different technical services dedicated to the costumers (construction site, launching, hauling, hulling, grounding, storage, crane service, sale of technical products, sail repair, bodywork, mechanical workshop, electrotechnics, carpentry).

All guarantee compliance with the regulations relating to waste disposal with the presence of separate collection, battery disposal, collection of waste oils (where present). Upgrades are underway to increase energy supply based on renewable energy.

In both areas there are services available for tourists, in particular various tourist itineraries are advertised and promoted that can be traveled in half a day or in a whole day in the surrounding area. Information materials are available at the centers but the guided activities are directly linked to the tourist sites and not to the various centers.

3.3. Overall information on annual traffic data (cargo/ro-ro/passengers/locals)

From the data collected, for sailing centers linked to sports associations, mainly annual contracts for residents who moor their boats (also for maintenance needs) are recorded. Seasonal tourist contracts are instead observable in the main marinas for medium and large boats.

4. SWOT analysis on small ports phenomenon

<p>Strengths</p> <p>The strengths of the small ports in the territory of the FVG region are the capillarity, the link with the territory to which they belong and the history (some were built almost a century ago); the region's position as a crossroads of trade and passages, as well as the development of transport- related infrastructure, is also a major strength.</p>	<p>Weaknesses</p> <p>The weaknesses are concentrated in the lack of willingness to open up to new realities (several nautical centers are sports clubs dedicated only to members).</p>
<p>Opportunities</p> <p>The opportunities are highlighted in the possibility of interacting with the cultural / naturalistic and tourist activities offered by the territory, not only to encourage residents but also to increase and involve the tourist flow.</p>	<p>Threats</p> <p>The threats are linked to competitors in the area (other activities that may involve people) and to the lack of interest in the development of further and new links with the tourist flow.</p>

This swot analysis highlights the great potential of the territory of the fvg region, linked in particular to the historical, cultural and tourism characteristics. however, particularly in the central area, there is little interest in supporting and increasing the attention and attractiveness of small ports towards outsiders. This weakness is due to the presence in the small ports of sports associations that do not currently intend to open to the public. the realization of the project would lead precisely to increasing the possibilities and interests of these associations.

5. Summary and conclusions

From the analysis carried out we observe a region in which, since the past, great opportunities for growth and development have been obtained and can still be obtained. The economic and social situation, despite the difficulties related to the pandemic crisis, are being resolved and the region is not stationary but rather ready to start again with new projects. In this situation of restart, the situation of small ports and sailing centers located along the coastal area can develop increasingly and obtain results and changes thanks to the involvement of the same stakeholders in the various activities proposed.

The Monfalcone project, which intends to focus on the realities of the territory, aims to develop the interest and the will of small realities, as a fundamental element for the realization of great results.