Employment trends in all sectors related to the sea or using sea resources

Italy

European Commission
DG Fisheries and Maritime Affairs

An exhaustive analysis of employment trends in all sectors related to sea or using sea resources

Country report – Italy

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1.0 Summary

The Italian maritime industries and the location by the Mediterranean coast have been key players in the economic development of the country. The process of globalisation has further increased the importance of the maritime sector to the economy and the development of sea highways and short-sea shipping have the potential to increase in the competitiveness of Italy as a maritime nation both in the Mediterranean region and globally.

In Italy, the core maritime cluster has consisted of following industries[I]: maritime transport, support services for maritime transport sector (including, agency and brokerage, goods handling, towage, pilotage, insuring, certification), merchant shipbuilding, recreational boating (including the tourism branch), fishing and institutional activities such as port navy, coast guards and port authorities. A study carried out by CENSIS on the Italian maritime cluster estimates that the Italian maritime sectors (as defined above) produce goods and services equal to €26million annually (2.3% of GDP)[II].

Table 1.1 Maritime economy figures, 2000 (millions of Euros)

	Industrial maritime activities[III]	Other maritime activities[IV]	Total maritime sector[V]
GDP	24,230	2,635	26,290

Source: Ecotec elaboration of Censis study, 2000

The CENSIS/Federazione de Mare 2002 study on the Italian maritime sector also concluded that a total of over 356,000 workers are employed indirectly and directly in the maritime sector, representing 1.5% of total national employment. According to the same study 185,830 individuals were directly employed in maritime activities. Furthermore, 88,985 are employed in the upstream economic sectors and 81,260 are employed in the downstream economic sectors.

The maritime cluster study update from 2004 found that employment fell by around 22,000 between 2002 and 2004. In 2004 direct employment stood at 122,386 and indirect at 211,224.

[I] Censis (2002) 'The second maritime economy report.'
[II] The third maritime economy report -not published yet-, presents an higher percentage: 2,7% (assonave)
[III] Maritime transport, maritime transport support services, merchant shipbuilding, recreational boating (including recreational tourism) and fishing.
[IV] Navy, harbour companies, port authorities
[V] The total may not correspond to the total value of the line values due to possible duplications

Employment in the sea related sectors, as defined as a part of this study, amounted to 179,000 in 2004[VI]. This is however a substantial under-estimation of employment in the Italian sea related cluster as no figures were obtained on coastal tourism employment, which is an important sector in Italy, both in national and European terms. Furthermore, data on maritime works and maritime service sector is likely to constitute only a fraction of real employment in these sectors.

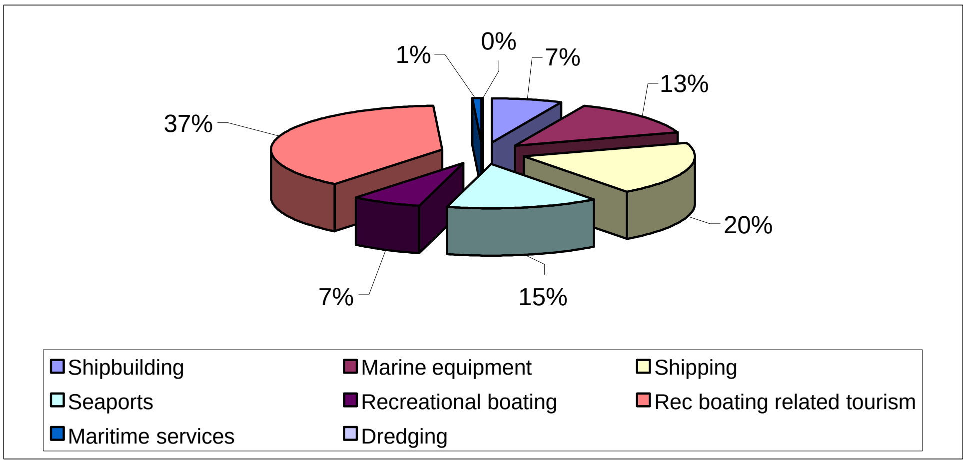
Table 1.2 Employment in the Italian maritime sector, 1995-2005

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Shipbuilding	10,213	10,500	10,762	11,244	11,845	12,957	14,042	13,438	12,727	12,033
Marine equipment	-	-	-	-	-	-	-	-	-	24,000
Shipping	38260	37210	29600	29200	29400	30600	31000	31450	32990	34480
Seaports	-	-	-	-	-	-	-	-	-	26,048
Recreational boating	-	-	-	-	-	-	-	-	-	11,719
Recreational boating related tourism	-	-	-	-	-	-	-	-	-	68,726
Maritime services	-	-	-	-	-	-	-	-	-	1,477
Dredging	-	-	-	-	-	-	-	-	-	30

Source: ECOTEC Research & Consulting, 2006

From these maritime sectors recreational boating is by far the largest sector. With nearly 93,000 employees it makes 44% of total direct employment in maritime activities. Shipping sector constitutes 20% of employment and seaport 15%.

Figure 1.1 Share (%) of employment by areas of activity, 2004



[VI] Shipbuilding and shipping figures are from 2003.

2.0 Shipbuilding

Italian shipbuilding has been said to rank among the most advanced shipbuilding industries in Europe. This is as a result of the efforts to improve plants, production and operational processes together with high levels of activity in research and innovation which is in part supported by taking advantage of the dual technological synergies with naval shipbuilding. But the high degree of competition, accentuated by competition from Asia, pushed Italy to reposition the production towards special market niches, such as cruise ships, fast ferries and cruise ferries.

The leading company in the shipbuilding sector is the Fincantieri group. It has eight shipyards in Italy handling around 80% of the shipbuilding related production in Italy. In 2004 the Ficantieri Group was responsible for 56% of global production in the cruise ship sector – together with its key suppliers.

The ship repair sector in Italy is limited as the ship repair yards in countries nearby (such as Croatia, Montenegro and Turkey) tend to be more competitive in terms of price and therefore in a better position to secure work.[VII]

2.1 Economic impact

In 2004 the quantity and the value of merchant shipbuilding production amounted to 634,000 CGT with a value of €2,200 million. Some 80% of the production is exported. The table 2.1 below offers a clearer breakdown of shipbuilding sector by production, new orders and orderbook.

Table 2.1 Economic impact of the Italian shipbuilding sector, 2004

Shipbuilding	No.	GT[VIII]	CGT[IX]	Million €
Production (of which for foreign account)	27 7	529,749 304,776	663,603 382,870	2,212 1,423
New orders (of which for foreign account)	32 10	1,107,393 749,876	1,284,886 863,670	3,974 2,724
Orderbook (of which for foreign account)	41 16	1,633,744 1,193,252	1,901,981 1,390,390	6,122 4,601

Source: CESA report 2004-2005

VII 2005 *The mapping of career path*
VIII Gross Tonnage
IX Compensated gross tonnage.

2.2 Employment trends

Italian shipyards created directly some 12,700 jobs in 2003[X] and approximately 12,000 jobs in 2004[XI]. Since 1975 employment has declined by a third. The table 2.2 below illustrates this process. However, in parallel to this trend, substantial amount of outsourcing has taken place and has resulted in employment creation in related industries.

Table 2.2 Employment in the shipbuilding sector, 1975 and 1995 to 2004

	1975	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Shipbuilding	21,460	8,509	9,160	9,832	10,248	9,877	10,121	9,734	9,606	9,211	N/a
Repair	14,800	1,704	1,340	930	996	1,968	2,836	4,308	3,832	3516	
Total	36,260	10,213	10,500	10,762	11,244	11,845	12,957	14,042	13,438	12,727	7,765

Source: CESA, 2005

Due to outsourcing these statistics do not present a full picture of employment in the shipbuilding and related sectors. At present, the majority of those employed in the shipyards are employed by companies classified in this study as companies in the maritime equipment sector. Approximately 70% of the final vessel is produced by a network of system, equipment and service providers. Thus the employment multiplier of the sector is very high. The next section deals with employment in the maritime equipment sector in more detail.

Turning to look at the size of Italian shipyars, as illustrated in the table below, a great majority (84.8%) of workers are employed in national shipyards with 500 to 1999 workers.

Table 2.3 Shares of Italian shipyard employment (%) by the size of yards

Number of employees	Shares of national shipyards' employment
1-199	13
200-499	2,1
500-1999	84,8
2000 and more	0

Source: Tholen & Ludvig (2005) Shipbuilding in Europe.

2.3 Employment projection

Employment in the shipbuilding industry is not expected to grow but has been projected to remain stable over the forthcoming years. The sector aims to hold to its strong position by focusing on high tech products[XII].

[X] On the basis of CESA data.
[XI] Based on information from the Federazione del Mare.
[XII] Assonave

2.4 Skills and training

The Italian shipyards demand a highly skilled labour force and maintaining continued access to a skilled workforce is of fundamental importance for the long-term competitiveness of the sector. Currently the situation is challenging because many shipyards have reported that they find it hard to recruit skilled personnel. To deal with this skills shortage, Fincantieri operates internal training courses to train its employees.

Recruiting general labourers is also difficult as the profession is seen as very demanding, thus not very attractive.

The competences acquired in shipyards are transferable to other maritime sectors. Many shipyard engineers have found jobs in marine equipment suppliers, research centres and port authorities after a career in the shipbuilding industry.[XIII]

3.0 Marine equipment

As already mentioned, in Italy the production of marine equipment is practically integrated in shipyards. As a result it is not possible to distinguish the marine equipment sector completely from the shipbuilding sector and employment in the sector is often seen as indirect employment to the shipbuilding sector. Moreover, establishing the level of employment in this sector is further complicated by the fact of companies that produce marine equipment also produce equipment for other industries.

The marine equipment sector consists of about 100 qualified shipyard suppliers. These companies are grouped into 9 clusters according to the type of their activity. The following table gives an overview of the number of companies in marine equipment sector in Italy.

Table 3.1 Types and number of companies in the marine equipment sector

Activity	No. of companies
Iron and steel materials	6
Mechanical equipments	10
Shipboard systems	13
Electrical and automation systems	17
Paints and insulation	16
furniture	27
Navigation equipments	4
services	1

[XIII] Assonave

Activity	No. of companies
Others	12

Source: Assonave

3.1 Employment

According to Assonave, in 2004 some 36,000 persons were employed in the shipbuilding or related sectors. According to their estimates just over 12,000[XIV] persons were employed directly in Italy's 22 shipyards and around 24,000 were employed indirectly in the related sectors, mainly in the marine equipment sector[XV].

4.0 Shipping sector

Italy boasts one of Europe's most modern fleets. At the end of 2003, the Italian merchant fleet comprised 1,407 ships, for a total of 10, 775,799 GRT. The table below offers an overview of the composition of the Italian merchant fleet.

Table 4.1 The composition of the Italian merchant fleet

	Number of ships	GRT
Liquid cargo ships	297	3,227,299
Oil tankers	105	1,539,776
Gas tankers	52	399,060
Chemical tankers	109	1,259,534
Other tankers	31	28,929
Dry cargo ships	172	4,263,990
General cargo ships	29	170,849
Container and refrigerator ships	30	833,470
Bulk carriers	36	1,364,280
Ferries	77	1,895,391
Passengers ships	420	2,507,361
Cruise ships	15	776,153
Hovercraft, catamarans and fast units	84	23,520
Ferries	213	1,677,960
Other passenger ships	108	29,728
Multipurpose carriers Ore/Oil,	2	65,225

[XIV] This estimate on employment in the shipbuilding sector is slightly higher than the figure provided by CESA for 2004.
[XV] Assonave

	Number of ships	GRT
OBO		
Auxiliary service ships	516	711,924
Tugboats and supply vessels	300	127,002
Other	216	584,922
Total	1,407	10,775,779

Source: confitarma

4.1 Employment trends

In 2004, there were just under 35,000 individuals employed in the shipping sector[XVI]. This data brings together the personnel on ships flying the Italian flag - 1st and 2nd register, (see below for an explanation of registers) and ships flying foreign flags, as well as personnel employed in shipping management companies[XVII].

Table 4.2 Employment in the shipping sector, 1995-2004

Year	Seafarers on-board	Total
1995	30610	38260
1996	29770	37210
1997	23650	29600
1998	23311	29200
1999	24500	29400
2000	25500	30600
2001	25800	31000
2002	26200	31450
2003	27245	32990
2004	28730	34480

Source: Confitarma

[XVI] Fitmarittimi.

[XVII] There are only ten small ship management companies in Italy. The ship management companies are usually in the business of crew management more than justdealing with technical management. There is less of a requirement for experienced ex seafarers in crew management than in technical management, so there are only a few ex seafarers employed within the ship management companies.

In the same year, the number of jobs in the Italian fleet amounted to 27,200, of which 19,000 were Italian or European seafarers, and 8,200 from other countries. The table below offers a breakdown of the estimated jobs in Italian ships of more than 100 gt.

Table 4.3 Estimated jobs onboard Italian ships of more than 100 gt

Ships	gt
Liquid cargo ships	5,015
Oil tankers	2,105
Gas tankers	830
Chemical tankers	1,750
Other tankers	330
Dry cargo ships	2,615
General cargo	395
Container ships	560
Bulk carriers	710
Ferries	950
Passenger ships	16,950
Passenger ships	4,500
Ferries	5,550
Hotel personnel	6,900
Auxiliary services ships	2,665
Tugboats	1,800
Others	860
Total	27,245

Source: Confitarma

The Italian cluster study by Federazione del Mare concluded that the maritime transport sector generated 26,300 labour units directly and further 60,006 indirectly. On the basis of this data the sector created a total of 86,000 labour units in 2004.

4.2 Employment projections

It has been estimated that the sector features an annual growth potential of 5 - 10% in relation to employment[XVIII]. However, this sector is also facing a labour shortage (as shipbuilding sector) so it is expected that only a proportion of those positions would be

[XVIII] Fitmarittimi

taken up by Italian seafarers. Rating positions are usually covered by foreign seafarers; the few Italian ratings tend to work only on vessels focussed on domestic trade[I].

4.3 Skills and training

As already mentioned, the Italian shipping sector is facing a labour shortage - a shortage of highly qualified officers in particular[II]. The sector provides employment possibilities for young people, but due to the working conditions and issue of re-employment after years at sea, Italian young people are not attracted to work in the sector.

The ‘skills crisis’ in the shipping sector affects both international transport and cabotage. Seafaring is generally viewed as both demanding and unrewarding. The retention rate of Italian seafarers is also very low. This is also due to the limited difference between the wages of shore based workers and seafarers.

Another factor explaining the lack of qualified people and the vocational crisis is the training system. Junior officers have to fund their own training at private training centres to obtain a mandatory STCW certificate. These courses were funded by the government until 2001. As Italian shipping companies do not currently pay for this training, the entire cost of the training is born by the junior officers. As a result, the 'would be officials' in poor financial conditions are excluded from this type of career.[III]

In addition to financial exclusion, there is also a high drop-out rate among young seafarers, which again contributes to the 'skills crisis'. In 2004, there were 352 Italian cadet officers[IV] at sea. However, of the total number of cadet officers only about 50% will become junior officers[V] as the statistics illustrate that half of the cadets leave seafaring after one or two years. It has been calculated that half of these drop-outs go directly to work in other maritime sectors such as ship agencies, freight forwarding, terminal operations and cargo logistics. The remaining continue studying further, most often at university level.

The Government has employed similar strategies than the UK government as a way of increasing training and employment of young cadets – as a part of the tonnage tax regime, from July 2005 there has been a requirement for one cadet to be berthed on each vessel

[I] It is worth mentioning that vessels registered on the Italian International Registry have to employ at least six Italian nationals.

[II] This view was unanimously expressed by two interviewees

[III] Filt cgil

[IV] 184 of these were navigating cadets and the remaining 168 were engineer cadets.

[V] 2005 *The mapping of career path*

entering the tonnage tax regime. Alternatively the shipowner has to contribute to a maritime education and training fund.

5.0 Seaports

There are 26 port authorities in Italy. These are non-commercial public entities.[I] Between 1992 and 1998 the port terminals in Italy were economically underperforming as few resources were available for maintenance and renewal. Since then the Italian State has been making funding available for the renewal and re-qualification of works in ports run by the Port Authorities as well as in a few other major ports.

The Port Authorities have been able to select the areas of investment based upon their individual strategic plans. There is a specific focus on the development of quays and dredging activities. Furthermore, particular attention has been paid to the renewal and improvement of connections between ports and rail/road networks.[II]

Investments in Italian ports constitute a great opportunity for the sector. However, in terms of infrastructure, the ports are not ready yet to respond to the increase in demand for port services. Investments on ports (particularly in relation to cruise tourism sector) are important for the growth of the Italian economy[III].

5.1 Economic impact

According to Assoporti, in 2003 nearly 45 million passengers travelled through Italian ports. This represented an increase of 6.7% in passenger traffic in comparison to 2002. Table 5.1 below illustrates recent developments in passenger and goods traffic between 2002 and 2003.

Table 5.1 Goods and passenger traffic in Italian ports

year	No of passengers	Goods (tons)			
		Liquid bulk	Dry bulk	General cargo	Total goods
2002	42,163,363	196,118	82,770	161,451	440,340
2003	44,989,870	198,107	85,427	170,275	453,809
Change (%) 2002 / 2003	6,7%	1,0	3,2%	5,5%	3,1%

Source: Assoporti

[I] Law no.84 of 1994 – reorganisation of port legislation
[II] Espo annual reports
[III] Ansa. Porti: Scajola, sono grande opportunita' per l'italia

In the ranking of principal Italian ports for the transport of containers Gioia Tauro and Genova can be classified as the top ports. The port of Naples is also very important for container traffic – especially with China. Since the mid 1990's, it has been one of the leading Italian ports for this type of traffic and has benefited from the growth of imports from the Far East. For example, in 2003 134.000 TEUs were imported into Naples from China whereas other countries only registered 88.000 TEUs[I].

Table 5.2 Movement of container in Italian ports from 1999 to 2003 (TEU)

	1999	2000	2001	2002	2003	Variation 2003/2002
Gioia Tauro	2.372.000	2.653.000	2.488.000	2.954.000	3.081.000	4,3%
Genova	1.234.000	1.501.000	1.527.000	1.531.000	1.606.000	4,9%
La Spezia	802.000	910.000	975.000	975.000	1.006.000	3,2%
livorno	458.000	519.000	521.000	547.000	593.000	8,4%
Taranto			186.000	472.000	658.000	39,4%
Napoli	309.000	397.000	430.000	446.000	430.000	-3,6%
Salerno	238.000	276.000	321.000	375.000	417.000	11,2%
Cagliari	26.000	37.000	29.000	47.000	317.000	574,5%
Venezia	200.000	218.000	246.000	262.000	284.000	8,4%
Trieste	185.000	206.000	201.000	185.000	117.000	-36,8%
Ravenna	173.000	181.000	158.000	161.000	160.000	-0,6%
Ancona	46.000	84.000	90.000	94.000	76.000	-19,1%
Others[II]	102.000	124.000	131.000	156.000	148.000	-5,1%
Total	6.145.000	7.106.000	7.303.000	8.205.000	8.893.000	8,4%

Source: Confitarma

5.2 Employment trends

During 1992-1993, port terminals in Italy were privatised after which port authorities have no longer employed people directly to work in port services. This led to job cuts in port authorities.

According to Federazione del Mar 26,048 people were employed directly in port logistics and other key tasks assisting maritime transport sector. This category of workers is slightly different than the definition of this study for port related employment but in absence of further information these statistics are used.

[I] Twenty feet equivalent Unit container standard.
[II] Savona, Civitavecchia, Trapani, Bari, Catania, Palermo, Marina di Carrara, Brindisi

In 2004, there were 248 maritime pilots employed by private companies providing pilotage services to port authorities.

5.3 Skills and training

Under normal circumstances the experience of ex-merchant navy seafarers is highly valued by port authorities and they have traditionally been highly sought employees. However, in recent years port authorities have not sought this target group as falling numbers employed in port authorities has meant that new jobs have been scarce. Only the tug crews are ex-merchant navy seafarers.[i]

6.0 Maritime services

The significance of maritime service sector has not been assessed in Italy, neither in economic or employment terms. Representatives of the maritime industries in Italy were not able to provide data on employment in different maritime service sectors. The following table 6.1 provides some information on the level of employment in some of the sub-sectors but the total figure (1,477) on the basis of this data is a major under-estimation of the number of jobs in this sector.

Table 6.1 Employment in the maritime service sector, 2004

Sector	Employment
Coast guard	1,269
Maritime law	200
Ship inspection	8

Source: Southampton Solent University, 2005

7.0 Maritime works

The Belgian company Dredging International is active in Italy through SIDRA (Societá Italiana Dragaggi Spa). They currently employ 30 people. No further information has been received on employment in maritime works sector – and the figure of 30 employees is again a substantial under-estimation of total employment in this sector.

8.0 Recreational boating

[i] *Southampton Solent University, 2005*

As a result of the beauty and length of the Italian coastline, the recreational boating sector in Italy is both strong and dynamic – indeed it is one of the key maritime sectors in Italy. Around 40% of the super yachts manufactured around the world are produced in Italy, and the Italian market - always heavily influenced by the super and luxury yacht sector - is Europe's largest in terms of value. Over the past few years it has experienced a significant growth and the sector is expected to grow even more as a result of the very beneficial tax regime for yacht registration. On the other hand, it has been reported that the potential of nautical boating is not fully exploited because of infrastructural shortcomings in ports.

8.1 Economic impact

The CENSIS study 2002 estimated that the economic impact of the recreational boating sector is at least €1,635 million. In this study the recreational boating industry consisted of production of boats, related equipment and engines. The table offers an overview of the value of the three sectors. It shows that the value of the marine equipment sector produces is over €500 million, most of which (81.6%) derives from the national market. Engine production features a strong export orientation (over half of the products are exported).

When assessed together with the nautical tourism sector, recreational boating has the highest capacity of downstream activities among the maritime sectors and consequently it has the greatest capacity to generate wealth. For every €1,000 invested in the sector, €5,019 is produced.[I]

Table 8.1 The value of recreational boating industry, 2000 (€000's)

	Boats	Equipment	Engines
National revenues (internal plus export)	811,870	456,548	47,514
Total imports	145,148	102,890	108,456
Total exports	640,923	155,015	29,955
EU exports	371,626	106,960	25,761
Extra EU export	269,297	48,054	4,194
Total revenues	957,018	559,438	155,970

Source: ECOTEC elaboration of Censis calculations on UCINA data

The value of €1,635 million identified by CENSIS underestimates the value of recreational boating according to another study carried out by UCINA. This study concluded that in 2004 recreational boating had a value of €2,242 million. As the table 8.2 reveals the economic impact of the sector has increased by nearly 50% between 2000 and 2004.

Table 8.2 Economic impact of recreational boating industry in Italy (millions €)

[I] Censis report

2000	2001	2002	2003	2004
1,498	1,777	1,953	2,085	2,242

Source: ECOTEC elaboration of UCINA, la nautical in cifre.

8.2 Employment trends

Statistics from Federazione del Mare (see below table 8.3) show that recreational boating industry is a significant employer in Italy and the total employment in the sector has gone up over the past 5 years. Companies producing equipment and accessories for the recreational boating industry are the most significant sub-sector in terms of direct employment. The industry also has a substantial employment generating impact through employment generated indirectly in related tourism activities

Table 8.3 Direct and indirect employment (work units) in the recreational boating sector, 2000-2004

Employment		2000	2001	2002	2003	2004
Direct employment		10,000[I]	11,000	11,500	11,800	11,719
Indirect employment	up	5,900	6,000	6,000	6,200	80,859
	down	75,000	76,000	76,000	76,000	
Total		90,900	93,000	93,500	93,800	92,587

Source: ECOTEC elaboration on UCINA-la nautica in cifre 2005

A study carried out on the marine leisure market in Europe by the British Marine Federation concluded that the Italian recreational boating sector employed nearly 100,000 employees in 2004 (92,900) making Italy to be the most important player in the marine leisure sector in Europe. According to this study 12,900 were engaged in boatbuilding, 40 in marine engine manufacturing, 10,000 in marine equipment manufacturing and 70,000 people in trade and service related jobs.

9.0 Coastal tourism

Italy is one of the top tourist destinations in Europe and the industry comprises of 400,000 companies with a total of over 2 million employees. The total turnover of the tourism industry is approximately €69.2 billion and the value-added is around €58.3 billion, of which 61.2 % is created by internal consumption and 38.8% by external consumption.[II]

[I] These figures are expressed in work units (AWUs), a statistical unit of measure that transforms all work positions in homogenous work units in terms of annual hours.
[II] Federturismo

Censis has estimated that the value of the maritime tourism branch in Italy is €3,520 million[I].

9.1 Employment trends

Employment impact of the Italian coastal tourism sector per se has not been officially calculated.[II] Some data on coastal tourism employment is nevertheless available, but only on employment in beach resorts and nautical tourism.[III] These sub-sectors however do not match with the definition of the sector as it is defined in this study. Researchers have been in touch with the statistics office of Italy as well as tourism sector representatives - but none of the stakeholders have been willing to provide an official estimation of total employment of coastal tourism (50km from the sea). Some general estimates were received, which substantially varied in scale, however the researchers were asked not to quote these estimations in this study.

If the level of coastal tourism employment was to be calculated by using data from the national statistics office for the hotel and restaurant sector for the NUTS II regions, this would also give an unrealistic picture of employment because out of all 21 Italian NUTS II regions only 6 are not located by the sea. These regions are Piemonte, Lombardia, Valle d'Aosta, Provincia Autonoma Trento, Provincia Autonoma Bolzano and Umbria. Thus the figures would cover nearly all hotel and restaurant jobs in the country.

Even if no figures are available, employment in this sector in Italy is likely to be very substantial. According to the Tourism Satellite Accounting of WTTC the total Italian travel and tourism industry jobs account for 4.9% of total employment in the country in 2006 with 1,115,000 jobs. The wider travel and tourism related economy generate 2,703,000 jobs in 2006.

Italy however has employment data on jobs on Italian beaches – with official figures listing 10,297 jobs during the summer of 2004. Between 1991 and 2003, the employment on Italian coastline increased by 23.5% (12 years ago the employees amounted to 8,338)[IV]. However the Italian union of beach resorts[V] claims that these official figures do not take into account 'undeclared workers' who are widespread for seasonal employment, therefore the number of workers can be estimated at around 33,000 for the summer 2004. These

[I] Census (2002)

[II] Istat.

[III] Nautical tourism is the tourism branch of the recreational boating sector. Recreational boating in the narrowest sense does not include the maritime tourism branch.

[IV] Labitalia article, 09/08/2004

[V] federturismo

figures include seasonal workers. The positive trend of employment on beach resorts between 1991 and 2003, is strongly related to the growth of infrastructure, mainly present in the North of the country. Emilia Romagna is the region in Italy providing the highest percentage of workers on beaches (20,9% of the total at the national level). Emilia Romagna is followed by Liguria (15,5%) and Toscana (15,4%). The beaches in the South of Italy are less equipped, and therefore provide fewer job opportunities.

With regard to nautical tourism, some figures on the number of 'work units' are provided by the study "la nautical in cifre" study. Findings from this study also demonstrate a trend of growth in employment.

Table 9.1 Employment (work units) in nautical tourism sector

2000	2001	2002	2003	2004
75,000[i]	76,000	76,000	76,000	76,000

Source: Ucina: La nautica in cifre.

9.2 Employment projections

In spite of some recent economic and international crisis, many analysts see the tourism industry as one of the few sectors in Italy with a very high growth potential. Findings from the Tourism Satellite Accounting confirm this trend by predicting a growth of 92,000 jobs (8.2%) in the travel and tourism industry between 2006 and 2016, and a growth of 205,000 (7.6%) jobs.

[i] These figures are expressed in work units (AWUs), a statistical unit of measure that transforms all work positions in homogenous work units in terms of annual hours.