



"Port and Finance : Green Deal & Blue Growth"

Napoli, 1° Ottobre 2020

RIFORMA DELLA L. 84/94 – Dlgs. 169/2016 – Modello *Landlord*

😊 *Governance* : Maggiore efficacia da 21 membri a 3/6 membri

😊 *Mitigante* : meno conflitti d'interesse tra gli *stakeholders*

😊 Art. 6.11 – Divieto di svolgere direttamente ed indirettamente attività portuali e connesse

😊 Il Presidente deve avere comprovata «**esperienza**»

😊 Art. 11 – *Ter* : Conferenza Nazionale di Coordinamento

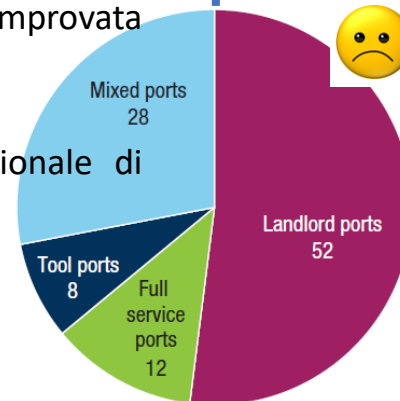
😞 *Overlapping Legislativo* : Troppe norme in sovrapposizione (Codice della Navigazione, L. 84/94, Regolamenti e circolari Ministeriali, ART, AGDC, Codice Appalti, Regolamenti Interni AdSP)

😞 Sistema di nomine caratterizzata dall'Autoreferenzialità Politica

😞 *Overlapping di Authorities* : Confusione di competenze tra Autorità Marittima ed AdSP

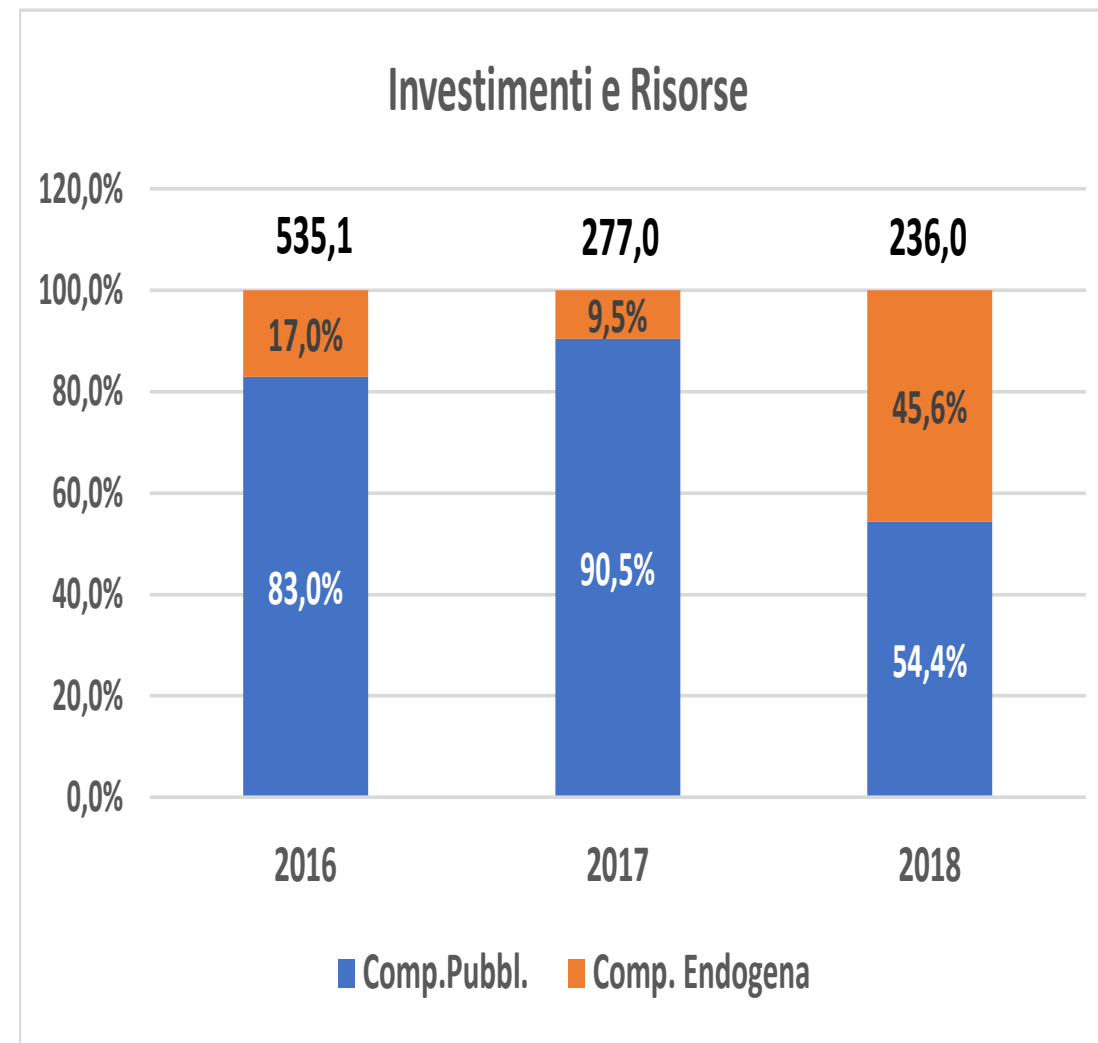
😞 Non piena attuazione di alcune funzioni (es. art. 11 *Ter*)

😞 Art. 18 *Septies* : Revisione della norma concernente la doppia concessione. Altre norme in coordinamento con il CdN (art. 36, 45bis, 46, 59)



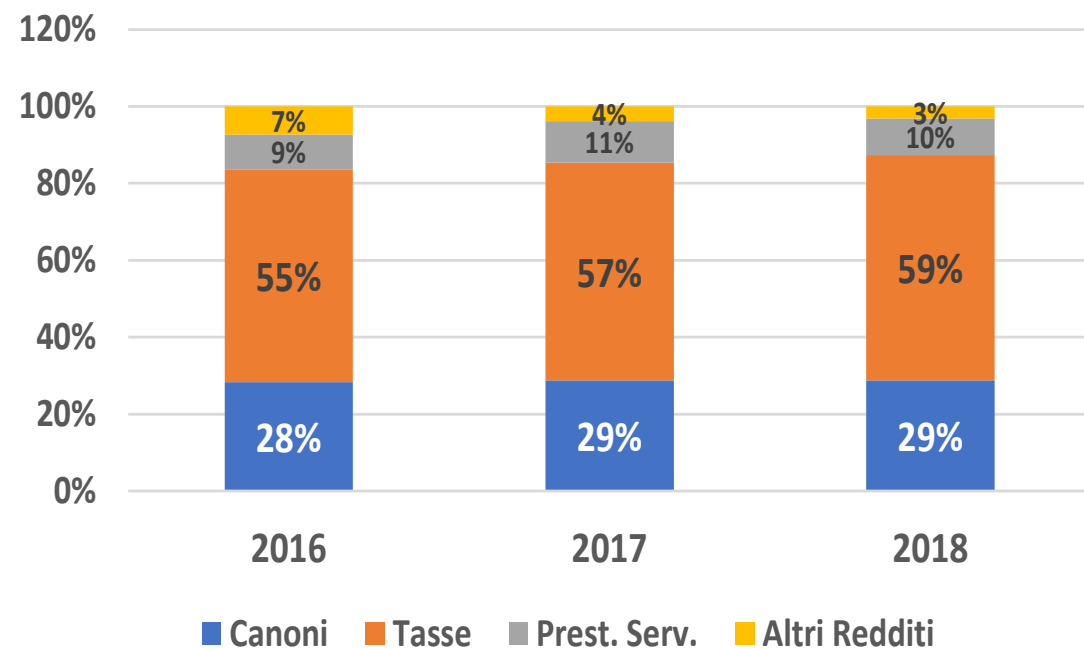
PERFORMANCE ECONOMICO-FINANZIARIE DEL SISTEMA PORTUALE ITALIANO

	2016	2017	2018
Canoni	159,2	155,5	159,2
Tasse	309,4	305,9	324,0
Prest. Serv.	51,8	58,7	52,8
Altri Redditi	40,9	20,6	17,0
Totale Ricavi	561,3	540,7	553,0
Costo Organi	6,5	5,5	5,4
Costo Pers.	106,1	104,8	105,8
Beni e Serv.	23,7	22,5	23,4
Totale Opex	136,3	132,8	134,6
Ebitda	425,0	407,9	418,4
%	75,7%	75,4%	75,7%
Risult. Economico	201,2	203,4	234,5
Patrimonio Netto	2.515,3	2.706,0	2.944,2
ROE	8,0%	7,5%	8,0%
Mq. Disponibili (mil.)			22,2
Canone (€/Mq.)			7,2
N° Operatori Terminals			339
N° Concessionari			4.596



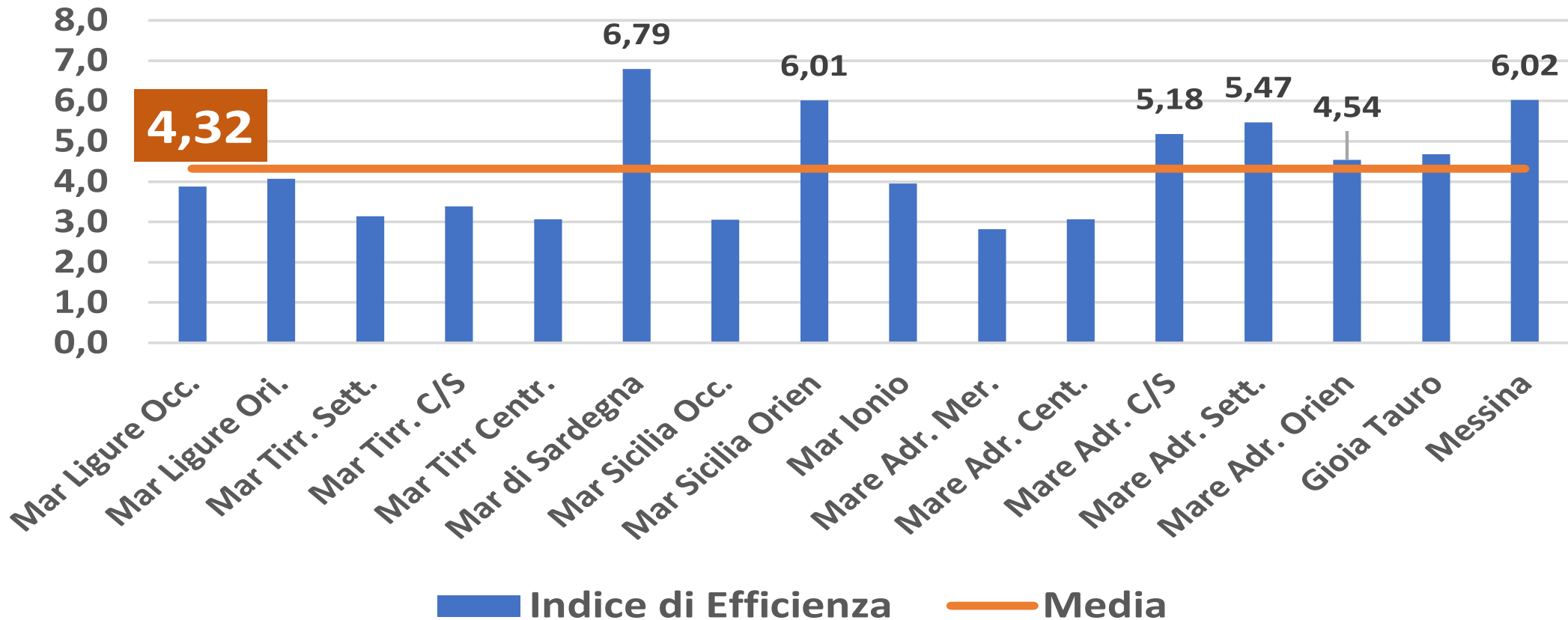
PERFORMANCE ECONOMICO-FINANZIARIE DEL SISTEMA PORTUALE ITALIANO

Breakdown Ricavi AdSP



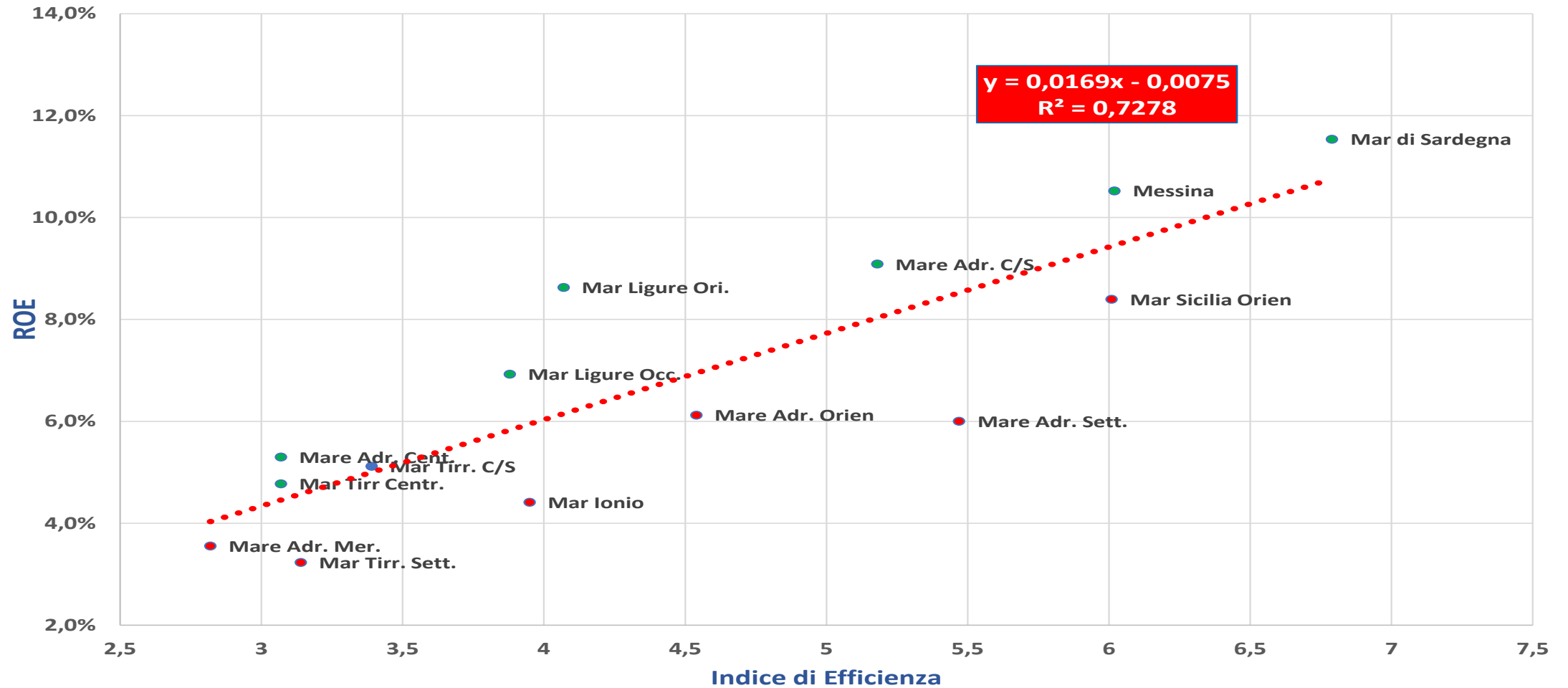
	2016	2017	2018	cagr
Tons/000	480.182	488.981	491.641	1,20%
Pax/000	49.418	59.901	63.998	13,80%
Tasse x Tons (€)	0,6	0,6	0,7	

Indice di Efficienza

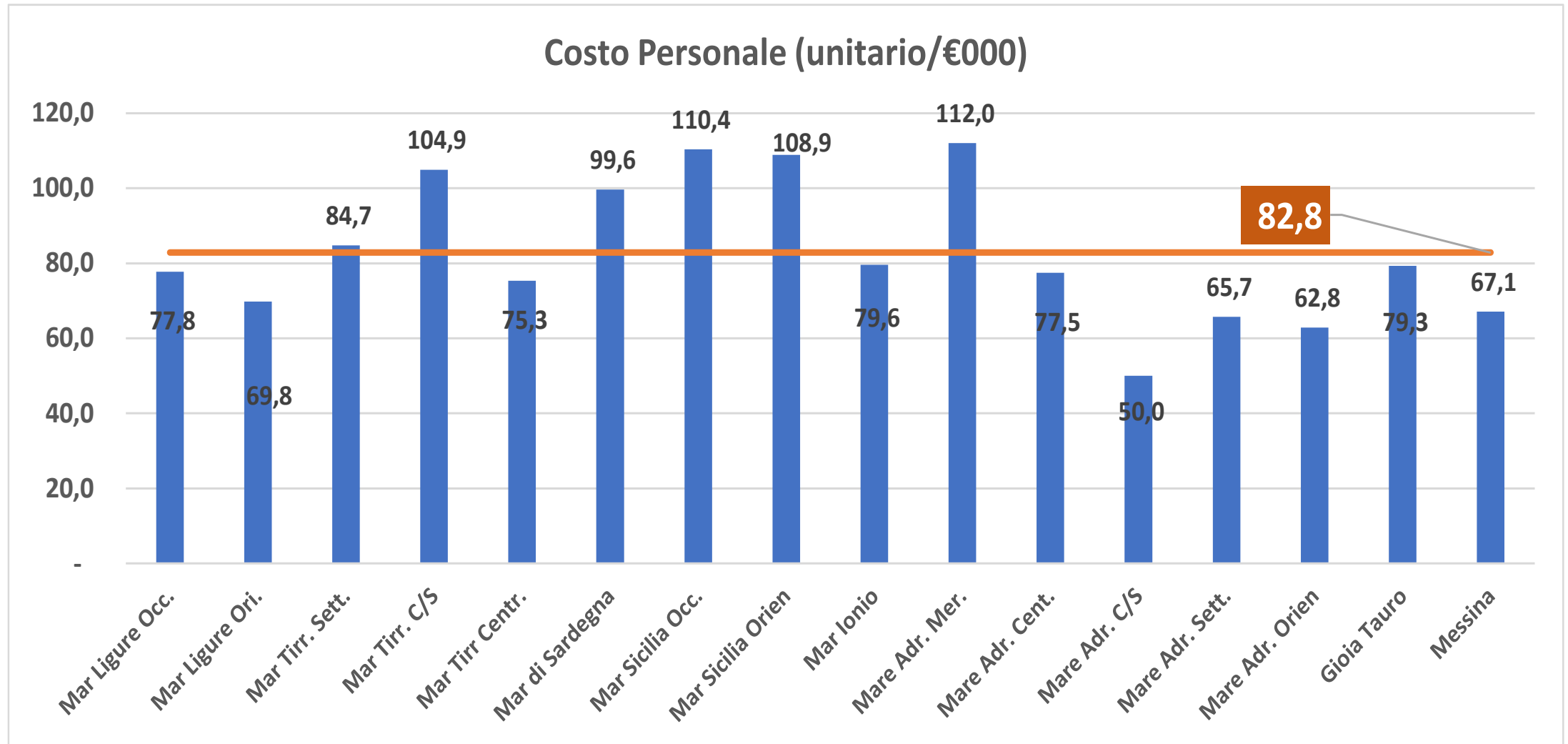


PERFORMANCE ECONOMICO-FINANZIARIE DEL SISTEMA PORTUALE ITALIANO

Analisi Performance AdSP

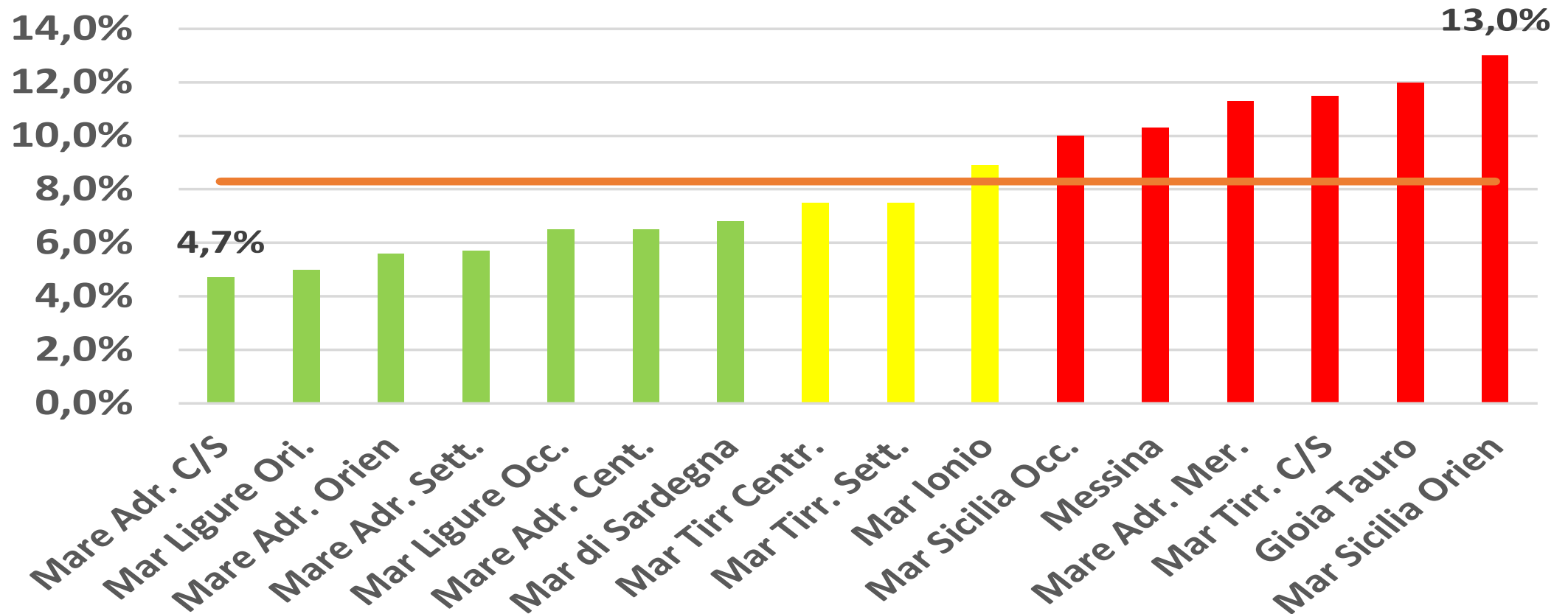


PERFORMANCE ECONOMICO-FINANZIARIE DEL SISTEMA PORTUALE ITALIANO



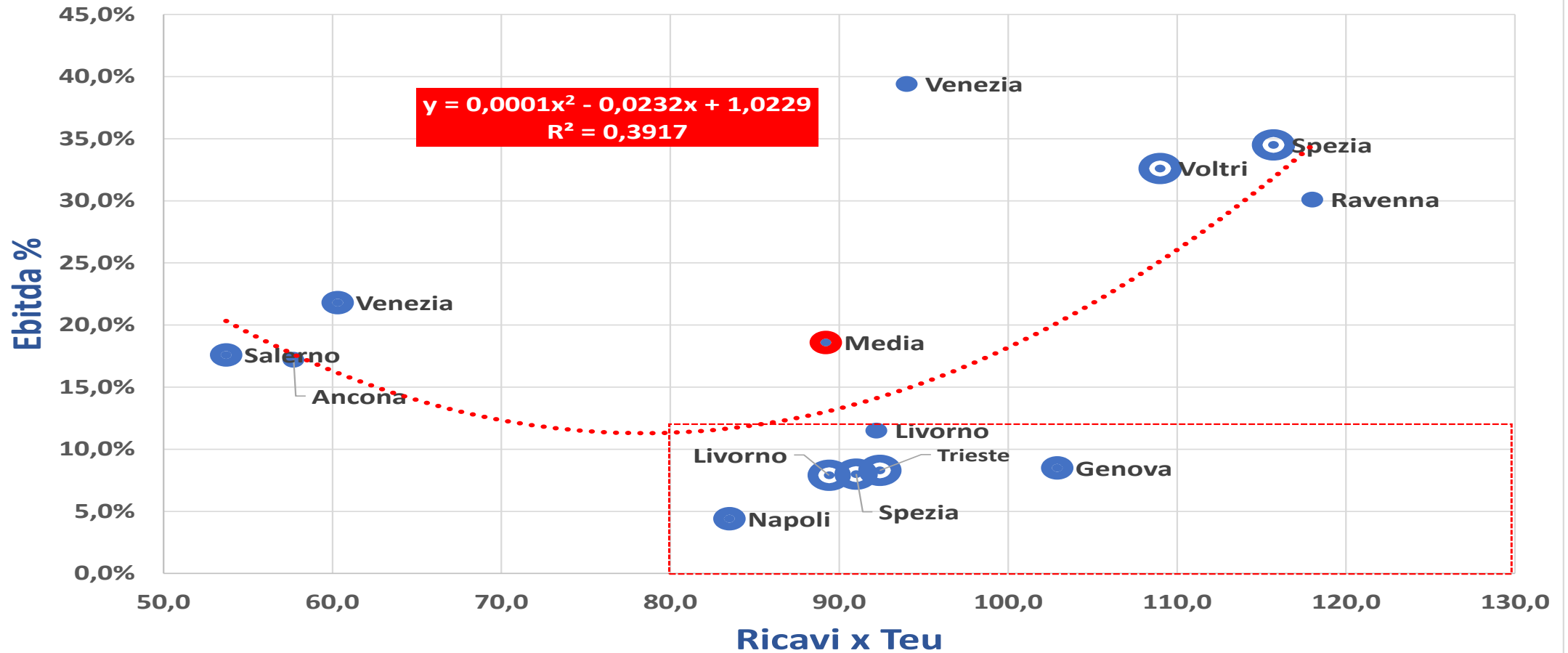
PERFORMANCE ECONOMICO-FINANZIARIE DEL SISTEMA PORTUALE ITALIANO

% N. Dirigenti



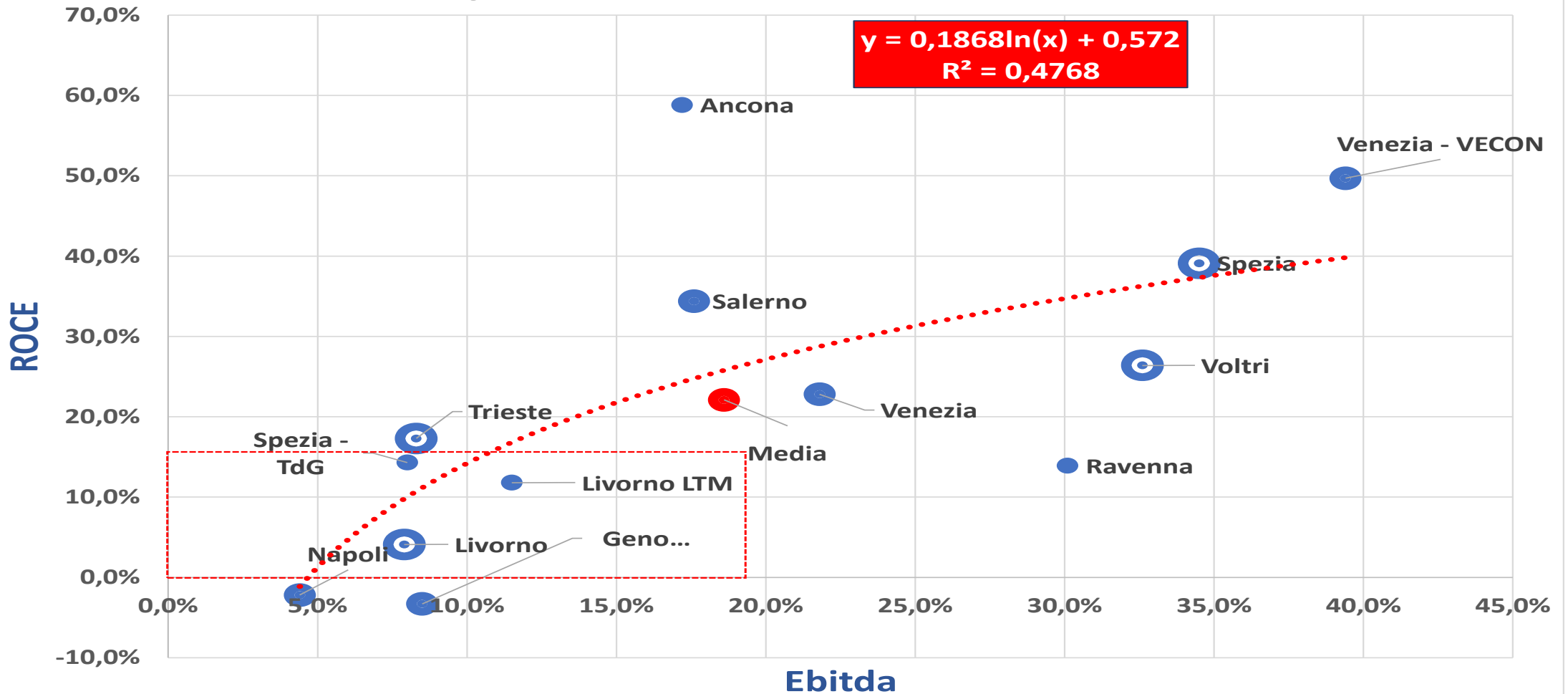
PERFORMANCE TERMINALS – CASO CONTAINERS

KPIs Terminal Container - Ricavi Teu/Ebitda%



PERFORMANCE TERMINALS – CASO CONTAINERS

KPIs Principali Terminal Containers - ROCE/ Ebitda

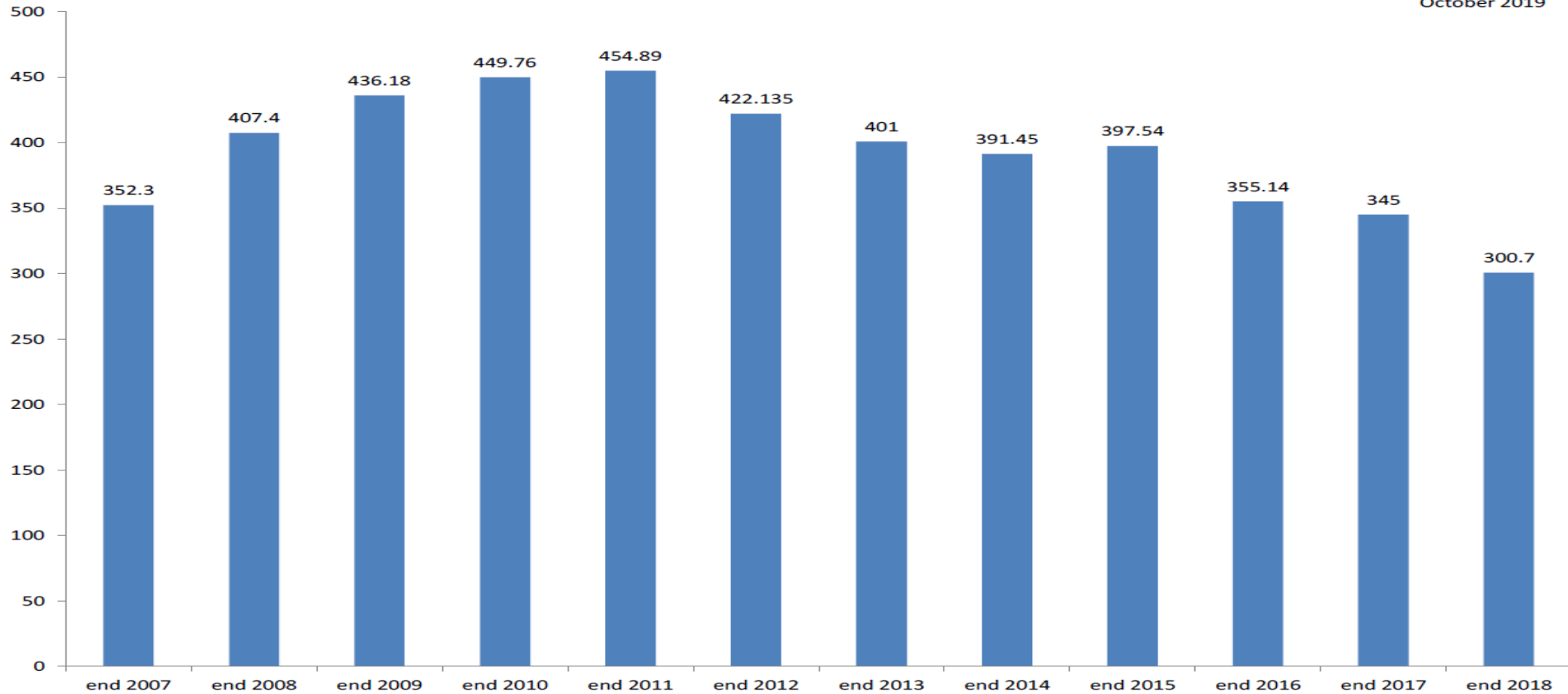


SHIPPING LENDING – FUGA DELLE BANCHE

Petrofin Research ©
www.petrofin.gr

October 2019

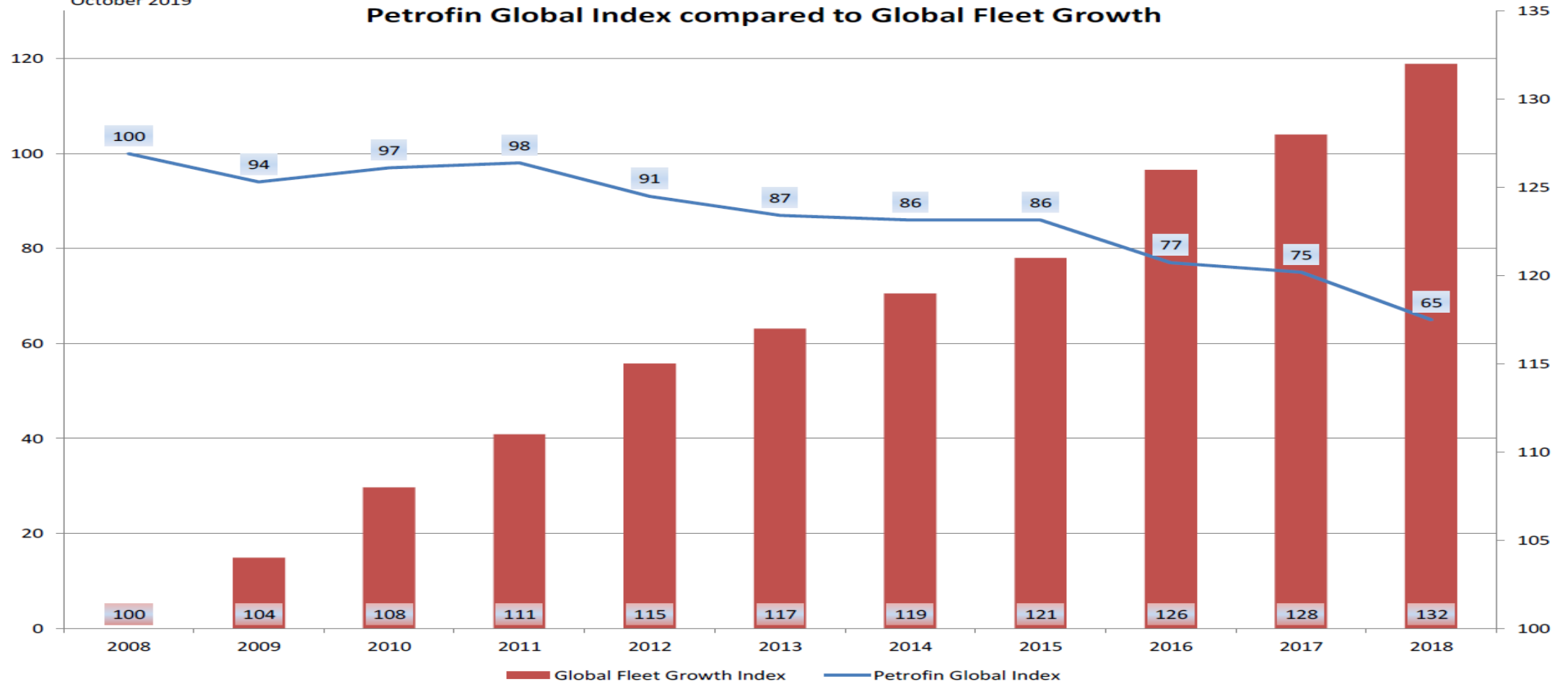
Top 40 Banks Lending to shipping



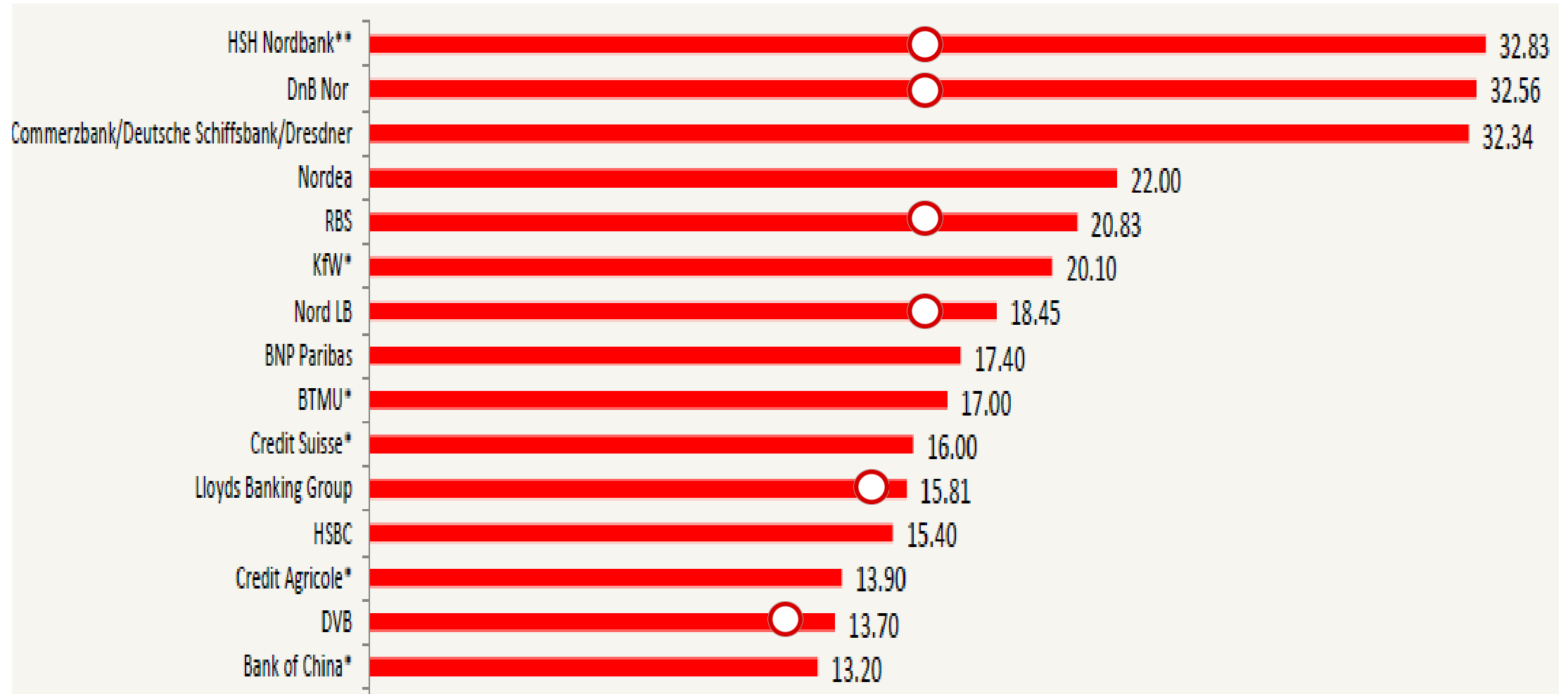
SHIPPING LENDING – FUGA DELLE BANCHE

Petrofin Research ©
www.petrofin.gr
October 2019

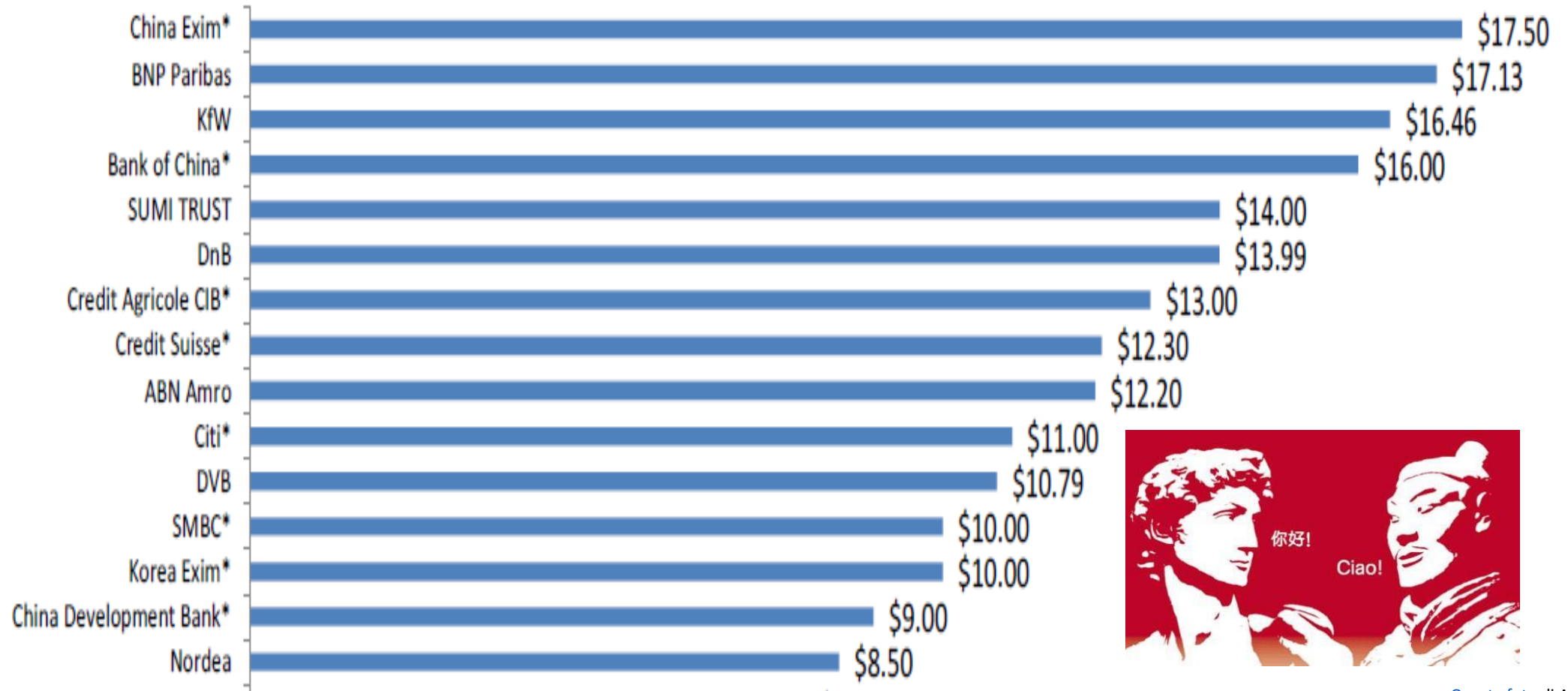
Petrofin Global Index compared to Global Fleet Growth



SHIPPING LENDING – FUGA DELLE BANCHE



PERFORMANCE TERMINALS – CASO CONTAINERS



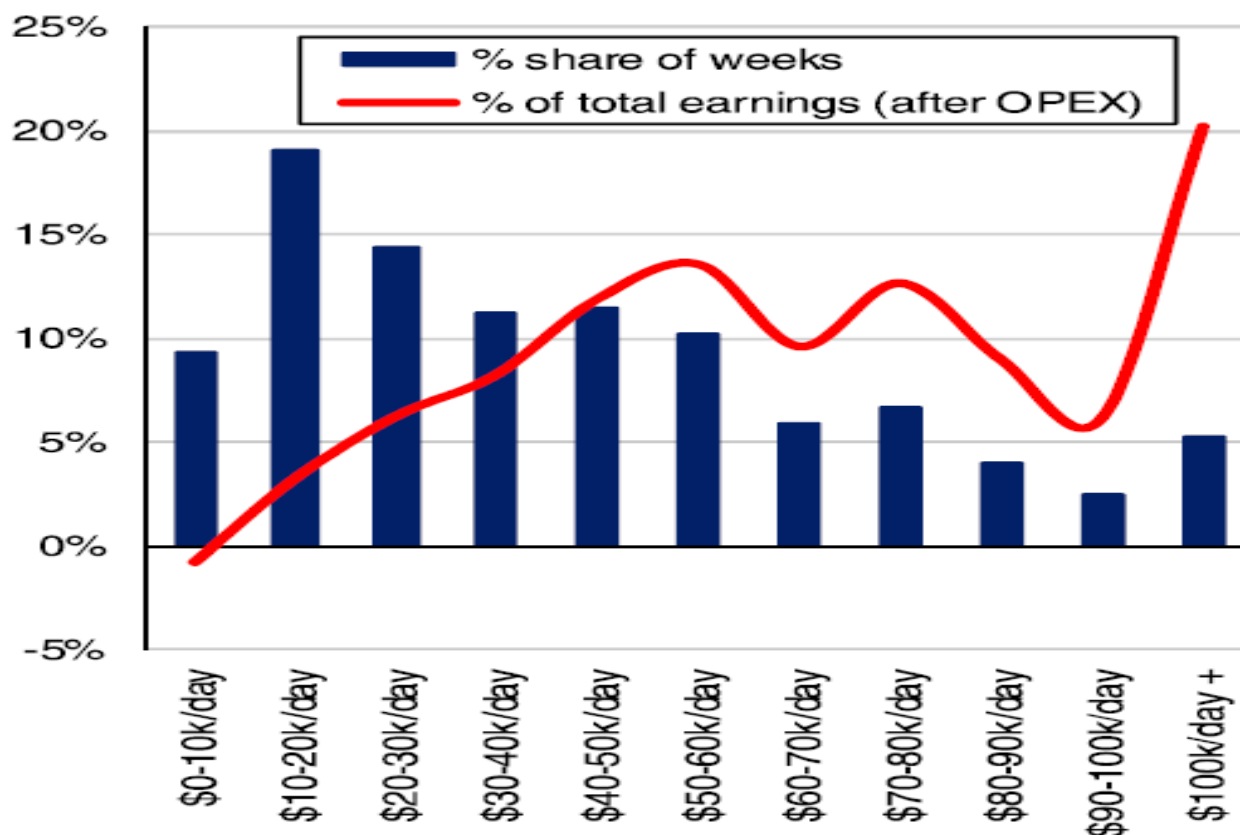
Questa foto di Autore sconosciuto è concesso in licenza da [CC BY-SA-NC](#)

Graph of the Week

So When Do Ships Really Make Their Money?

The bars on the graph show the share of weekly average VLCC spot earnings observations (start 2000-end 1H 2019) in each \$/day range. The red line shows the share of total cumulative earnings after OPEX across this period in each range. A wide selection of vessel earnings time-series are available on *Shipping Intelligence Network*.

The author of this feature article is Trevor Crowe. Any views or opinions presented are solely those of the author and do not necessarily represent those of the Clarksons group.



Source : Clarksons Research