



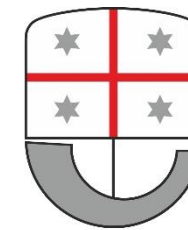
The European House

Ambrosetti

Liguria 2022

Genova, Palazzo Ducale

Martedì, 14 luglio 2020



REGIONE LIGURIA

PRESENTAZIONE DI ERIK W. JAKOBSEN



Fondazione
Compagnia
di San Paolo



VADO LIGURE • SAVONA • PRA' • GENOVA



ExxonMobil Brands



Camera di Commercio
Genova

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Imperia La Spezia Savona



Gruppo Messina



#LIGURIA2022

LIGURIA 2022

The Maritime Economy: the reference context

Erik W. Jakobsen, phd, partner Menon Economics



- A research based economic analyses and advisory firm
- Based in Oslo
- > 50 high-level economists, of whom ¼ with ph.d
- Serving governments, organizations, investors and companies
- Specialized in maritime industries



THE LEADING MARITIME CAPITALS OF THE WORLD 2019

A Menon Economics and DNV GL Publication



THE LEADING
MARITIME CAPITALS
OF THE WORLD
2019

DUBAI

CITY REPORT



Why we make the report

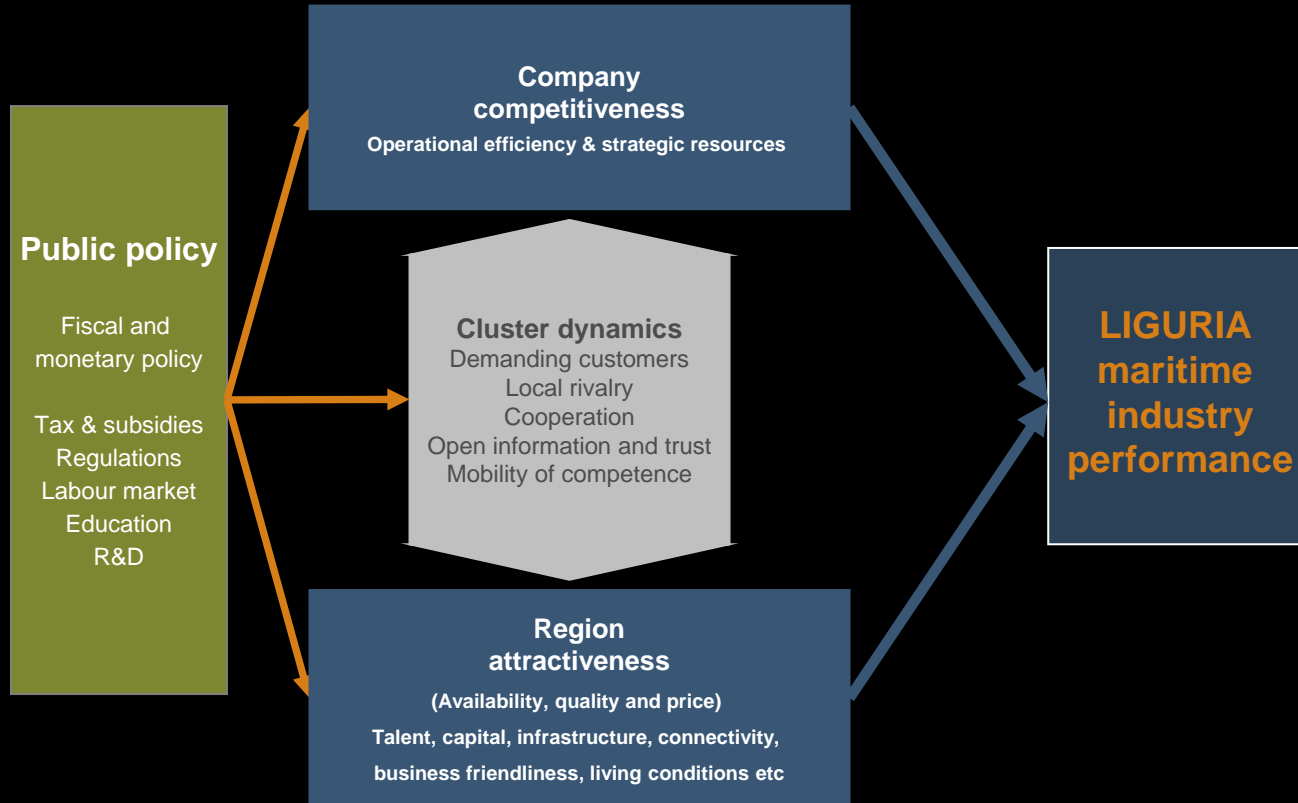
- Countries and city regions compete to attract and retain maritime companies operating in global markets
- Several countries and regions have recognized the tremendous success of Singapore's maritime strategy – and intensify their effort to increase their attractiveness and the competitiveness of their maritime industry
- Not a zero-sum game:
 - *By competing on innovation, talent recruitment and cluster dynamics, the global maritime industry becomes more productive, and hence, create more value both for their own region and for the world economy.*

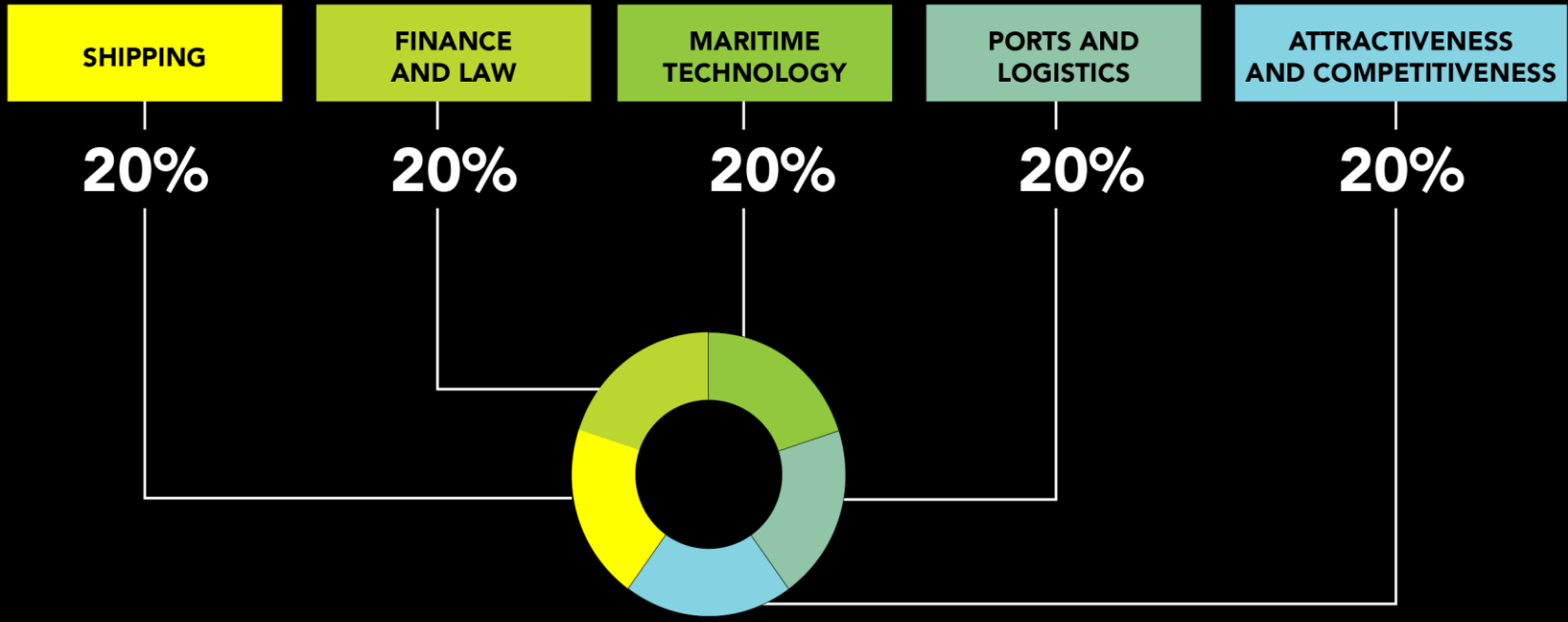
What is a leading maritime city?

1. A large and sophisticated shipping community – with owners, HQs and operation
2. A large port with varied and advanced logistics services
3. A specialised technological milieu, composed of yards, equipment producers, maritime R&D and innovative start-ups
4. Complete supply of specialised world-class services of finance, law and insurance

What are the drivers?

- Strategic location
- Favorable and stable political framework
- Transparent and efficient legal framework
- Proximity to large, demanding customers
- Local rivalry
- Specialized universities and research institutions
- Large pool of talents
- Rich and open flow of knowledge and ideas
- Relationships based on **trust**
- Meritocratic education and career system
- Soft location factors – an attractive place to live





TOTAL RANKING

Genoa city region ranks

Shipping	Finance	Maritime technology	Ports & logistics	Overall
No 34	No 20	No 15	No 37	No 21 (No 8 in Europe)

- **Digitalisation**

- *Of ships, fleets and entire logistic systems*

- **Climate change and environmental damage**

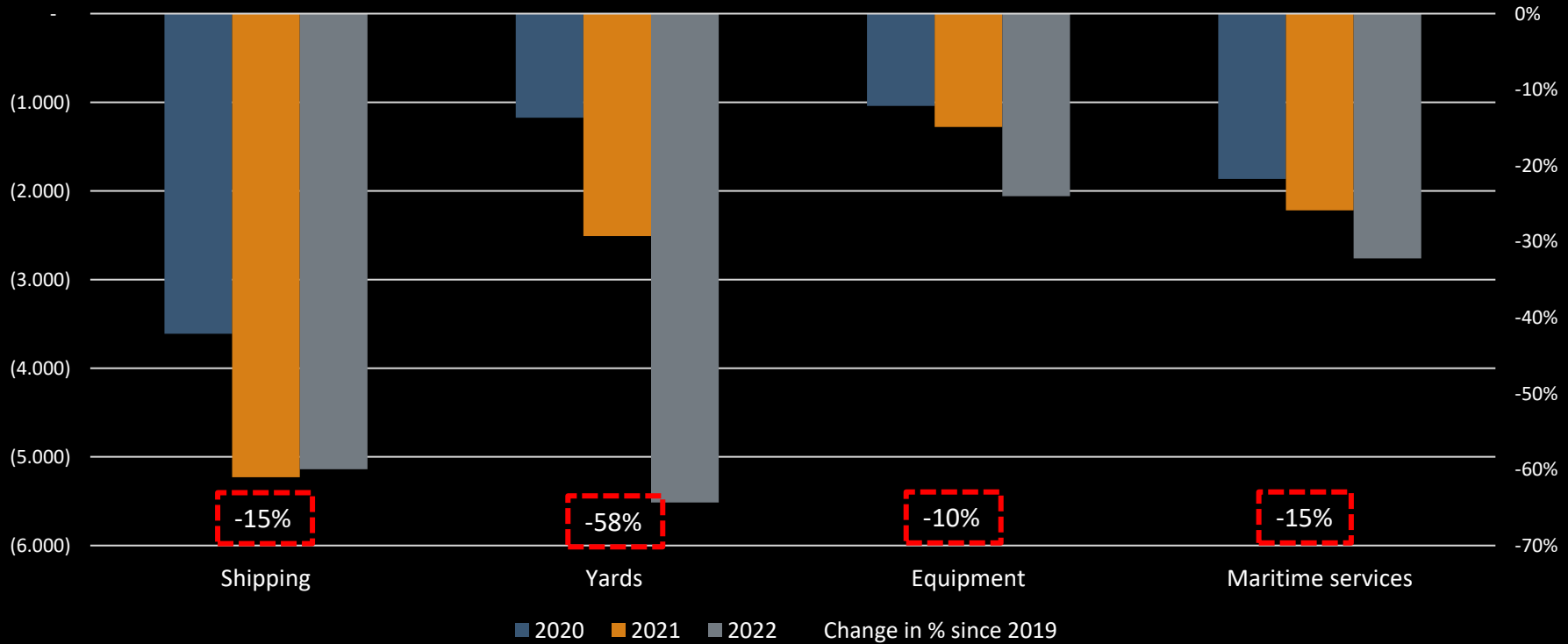
- *Green transition; energy sources, engines, propulsion systems and infrastructure*

- **High growth and integration of ocean industries**

- *Tourism, aquaculture, offshore wind, deep-sea mining*

- **Geopolitical changes – a question mark**

Employment in the maritime industry in Norway compared to 2019



- **Long-term growth in deep sea shipping demand – 2-3% per year**
- **Green growth in short sea shipping**
- **Hard times for ship-building: Excess capacity in most shipping markets**
- **Uncertain demand in the cruise industry**
- **Strong growth in offshore wind and aquaculture**
- **Continued and sharpened competition from China and South East Asia**
- **Europe taking/retaining leadership in the green, digital transition?**

**What is innovative today, will be
conventional tomorrow**

**It is not Liguria's products and technologies
that constitute your competitiveness,
but the
capability to continuously create
something new and better
– through collaboration in the ecosystem**



THANK YOU FOR THE ATTENTION!