

SIROCCO Project

***Sustainable InteRegional cOastal & Cruise maritime tourism
through COoperation and joint planning***

MED/1425

WP 3 – Studying

Activity 3.6 – Sustainable Cruise Value Chain Action Plan

A.3.6.1

SUSTAINABLE CRUISE VALUE CHAIN

ACTION PLAN

IN CIVITAVECCHIA (IT)

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1. Scope of the document

The scope of the Deliverable is to provide an action plan for enhancing environmental, social and economic sustainability of the Cruise Value Chain in Civitavecchia.

For doing this all solutions will be undergone an assessment of their feasibility and of their sustainability impact based on the Sustainable Cruise Tourism Certification System developed in A3.4.

2. The European cruise industry in brief

In 2015 the cruise industry in Europe generated a total expenditures value of 16.89 billion of euro. The 64% of this value were concentrated in three countries: Italy, UK and Germany. These countries are the main for this kind of business because they are at the same time: source and destination for cruises, location of the main cruise companies, and location of shipbuilding and ship provisioning facilities.

The passengers embarked on their cruises from a European port are 6.12 million and around 5.0 million of these were from European countries, the rest are from outside Europe.

Each passenger spends an average of 61.82 euro at each port visited, while a crew member around 22.99 euro. Together crews and passengers produce an economic spending impact of around 3.83 billion of euro.

In Europe operate more than 60 cruise companies (domiciled or less) with around 196 vessels and 249,000 lower berths. The vast majority of these cruises visits Mediterranean and Baltic regions, and all together touch around 250 European port cities.

Cruise lines activities in European ports for goods and services for supporting their cruise operations give job opportunity to more or less of 360,571 indirect employees. The direct activity inside offices and vessels occupies a total number of job employees around 185,476 people (the 37,85% of the global value).

In Europe the total passengers embarked value, after six-years growing, reached the value of more than 6.9 million of people (the 26% of the total global value). Combining this value with the total crew members and transit passengers, it is reached the final value of 45.88 million of people.

Focusing on the Mediterranean sub-region, it is possible to notice that here the cruise industry is a fairly self-contained business with around the 61% of the market directly produced and consumed inside the same borders.

The Mediterranean area alone produces around 30.5 million of bed days, while the rest of Europe produces 19.2 million of bed days.

In Europe, passengers spend annually around 4.31 billion of dollars, which represents the 26% of the total global value (16.39 billion of dollars), while the expenditures by crew members account to total annual value of 0.16 billion dollars (the 11,42% of the global value).

Expenditures by cruise companies consist of purchases of goods consumed and used on ships, port charges and fees, travel agent commissions, administrative expenses, wages paid to shore side employees and much more. In Europe this value accounts for around 16.22 billion of dollars which consists to the 40.39% of the total global value.

Summing up all the expenditures related to the cruise business in Europe, the total reaches the value of around 20.69 billion dollars.

Over the direct expenditures, there are also indirect and induced contributions due to spending of the directly impacted businesses and their employees. These values together generate in Europe a total output of 43.30 billion dollars and total income value of 27.12 billion.

Finally, combining the direct, indirect and induced contributions, the cruise tourism in Europe generate a total output of goods and services of around 50.15 billion dollars while the total incomes value generated is 12.32 billion dollars.

The total amount of people involved in the sector (direct, indirect and induced) is of 381.426.

3. The Cruise industry in Italy and the role of Civitavecchia

With a total passengers' value of 0.75 million, Italy is the 7th largest source country of the global cruise market and the first in the Mediterranean area. This market gives job to 103,010 people and a total expenditures value of 4,554 million euro.

In Italy there are located four of the first ten European ports for number of cruise passengers: Civitavecchia, Venezia, Napoli and Savona.

PORT	PASSENGERS IN 2016	% VARIATIONS COMPARED TO 2015
Civitavecchia	2,339,676	+3.0%
Venezia	1,605,660	+1.5%
Napoli	1,306.151	+2.9%
Genova	1,017,368	+19.9%
Savona	910,244	-7.3%

Table 1: Passenger traffic and variation in the first five Italian cruise ports

In the last three years the port calls have seen a slight growing (+3.2% in 2016) reaching a value of 4,980. The average number of passengers managed for each ship touched the value of 2,225.

The Region leader for number of cruise passengers is Liguria (where is located Genova) while the Region leader for number of port calls is Lazio (Civitavecchia).

The cruise traffic in Italy, value for each region.								
Ranking			2016		% distribution over total		% variation compared to 2015	
2016	2015	Region	Passengers	Port calls	Passengers	Port calls	Passengers	Port calls
1	1	LIGURIA	2.468.637	788	22,3%	15,8%	-3,8%	-5,3%
2	2	LAZIO	2.345.504	870	21,2% Cruis	17,5%	2,9%	6,5%
3	3	VENETO	1.605.769	530	14,5%	10,6%	1,4%	0,8%
4	4	CAMPANIA	1.517.183	803	13,7%	16,1%	-2,5%	5,7%

Table 2: Cruise traffic in the first four Italian Regions

Considering the percentage distribution of passengers' movements between embarking-disembarking and transits in 2016 in the Italian main cruise ports.

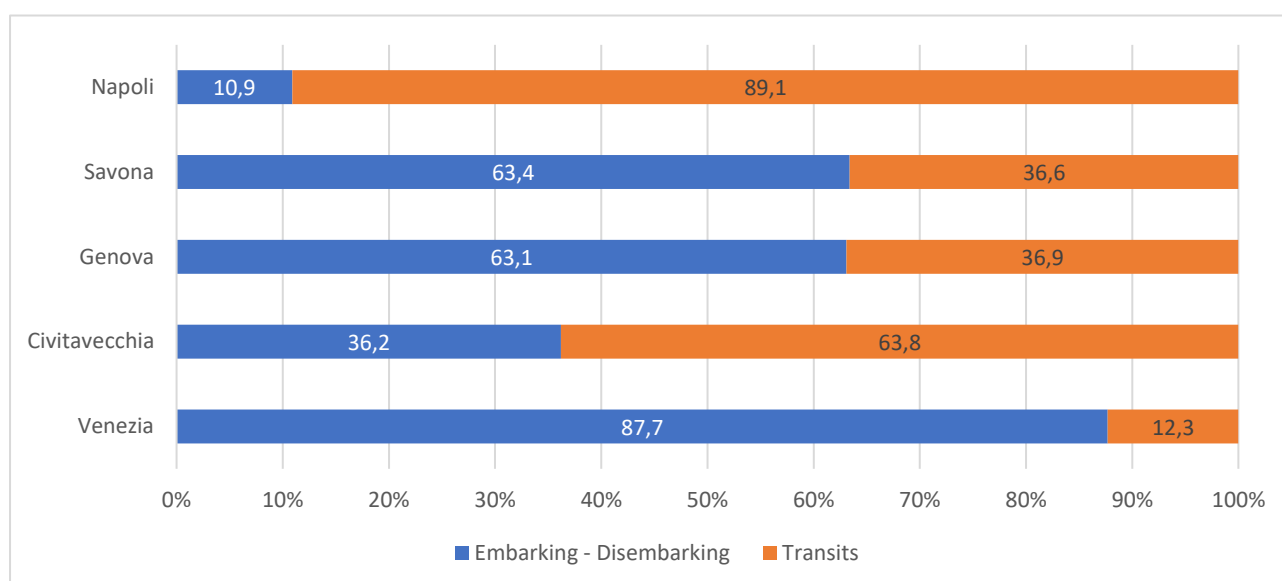


Table 3: Embarking/Disembarking and Transit passenger percentages in the first five Italian cruise ports.

It is possible to notice that three out of five harbours are mainly Home Ports, while Civitavecchia and, especially, Napoli have a traffic composed more by transit passengers.

The Italian cruise industry, thanks to its position in a closed sea, is practically present all year long. Dividing the year in three main "market seasons" (June - September, February - March, October - January), it is possible to notice that:

- The "summer season" catches always over the 50% of the total annual passenger number;
- The "spring season" is the second most trafficked and has always percentages over the 33%;
- The less used season is the "winter" one that in any case occupy always the 10% of the entire traffic.

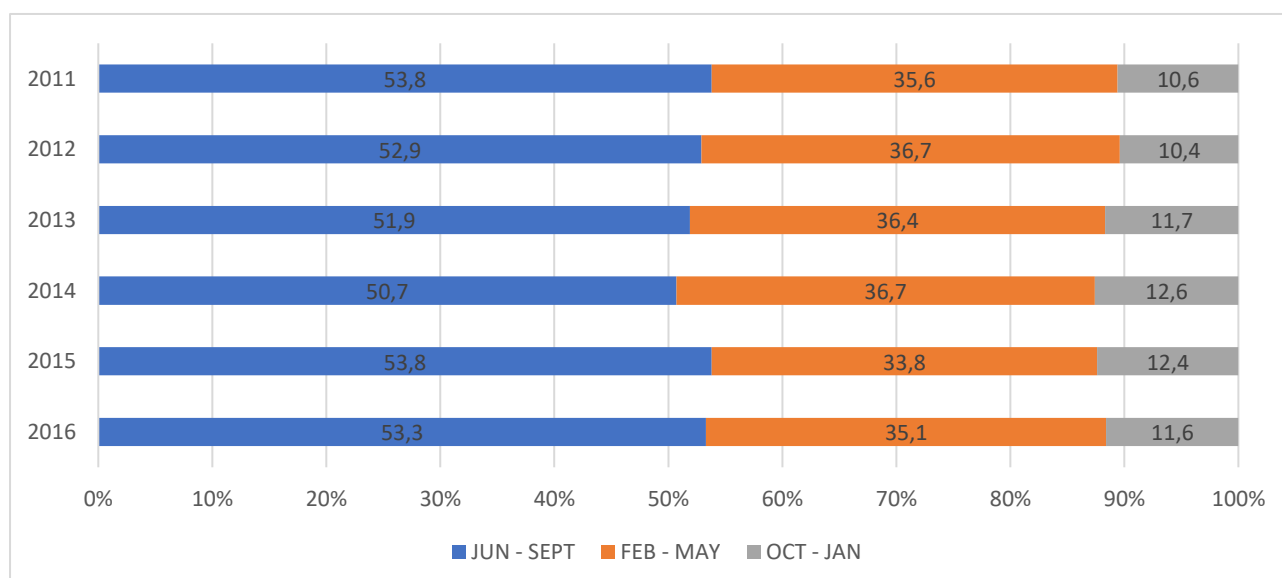


Table 4: Traffic cruise seasonality in Italy

Talking about the managerial side of the cruise industry, in the 46% of Italian ports there is a specific company in charge of organising and handling cruise ships.

In four over the five most important cruise ports these companies are not under the control of a unique entity, but they are a composition of public and private different shareholders. The only exception is Savona, where the cruise terminal manager is totally controlled by Costa Cruises.

PORT	MANAGING COMPANY	COMPANY COMPOSITION
Civitavecchia	Roma Cruise Terminal	Costa Crociere (33.33%), Marininvest-MSA (33.33%), RCCL-Royal Caribbean (33.33%)
Venezia	Venezia Terminal Passeggeri	APVS-Venezia Port (53.00%), Finpax (22.18%), SAVE-Venezia Airport (22.18%), CCIA-Chamber of Commerce (2.64%)
Napoli	Terminal Napoli	Marinvest-MSA, Aliauro, Napoli Port Authority, Costa Crociere, RCCL-Royal Caribbean
Savona	Costa Crociere Terminal	Costa Crociere
Genova	Stazione Marittima	Grandi Navi Veloci (32%), Genova Port Authority (21.9%), Marininvest-MSA (18.1%), Costa Crociere (13.3%), Moby (7.3%), Municipality of Genova (5%), Tirrenia (2.4%)

Table 5: Companies, and their shareholders composition, in the five most important Italian cruise ports

The same ports are constantly increasing and developing their carrying and infrastructural capacity for better handling passengers and better hosting vessels every year bigger and a market in a continuous evolution. For next triennium (2018-2020) are planned investments for around 300 million of euro, little more than half for safety and security systems, the remaining part for improving existing infrastructures.

PORTS	PIERS	LENGTH (m)	TERMINAL STATIONS	MAX LENGTH (m)	DRAFT (m)	AIRPORT DISTANCE (km)	TRAIN STATION DISTANCE (km)
Civitavecchia	5	2,150	5	795	13.5	60	0.8
Venezia	12	3,450	10	340	9.10	13	1.5
Savona	3	775	2	450	9	32	2.3
Napoli	7	1,100	1	390	10.67	15	3.0
Genova	12	3,000	2	No limit	10.5	6.5	0.5

Table 6: Infrastructure and accessibility capacity in the five most important Italian cruise ports

For the actual situation, the only ports that cannot host the present biggest cruise ships (as the Harmony of the Seas) are Venezia and Savona. Their main problem is the insufficient draught/draft length.

The port that presents the best level accessibility for cruise tourists is Genova where both, the distance from the railway station (0.5 km) and from the airport (6.5 km) are the shortest.

Civitavecchia manages around the 20% of the total Italian cruise traffic and the 9% of all the European one. These values make the "Port of Rome" as the first cruise port in Italy and the second in the Mediterranean area.

In the last seven year the trend of the yearly passengers' flow has seen a fluctuating shape with a total average value of 2.693.892.

Civitavecchia, together with Barcelona, is the only port in the Mediterranean area that still has a passenger total traffic value of over 2 million.

As already mentioned, most of its business is more as a transit port than as a home port. The average difference between these two values is around the 41%.

The total number of port calls in 2017 was of 693 (-17% compared to 2016). For the 2018 is expected an increasing of this value thanks to more than 40 cruise companies that asked to operate in Rome.

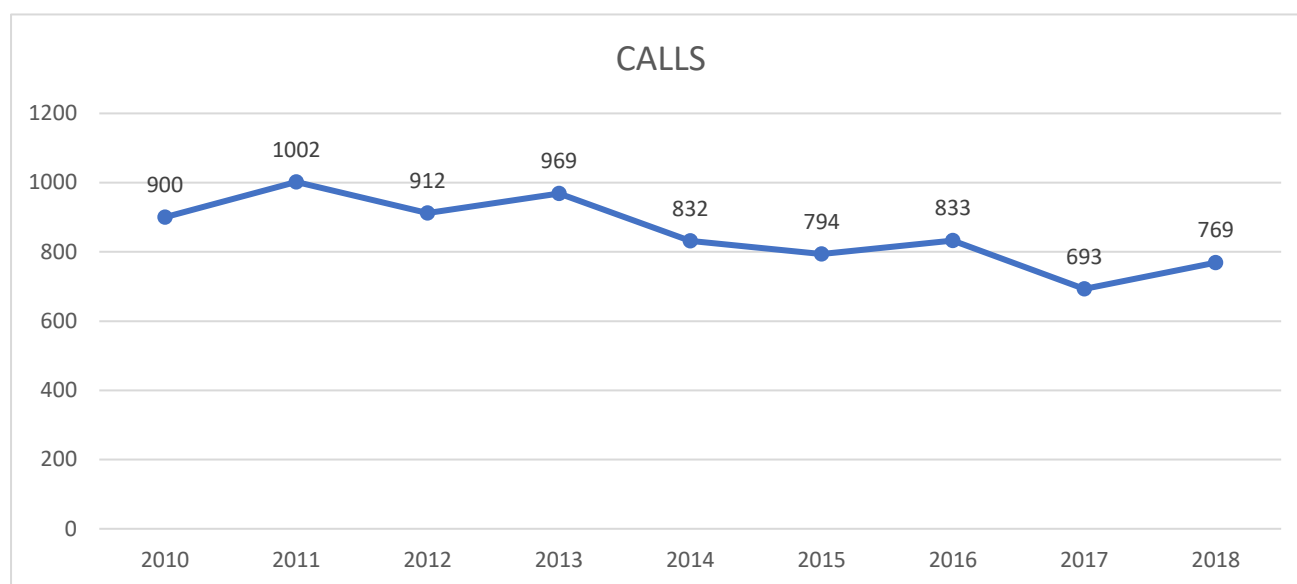


Table 7: Calls trend in the Port of Civitavecchia

As in the Italian national market, also in Civitavecchia the cruise traffic is present all year long and the busiest season is the "summer" one.

The percentages for each season look similar to the national ones:

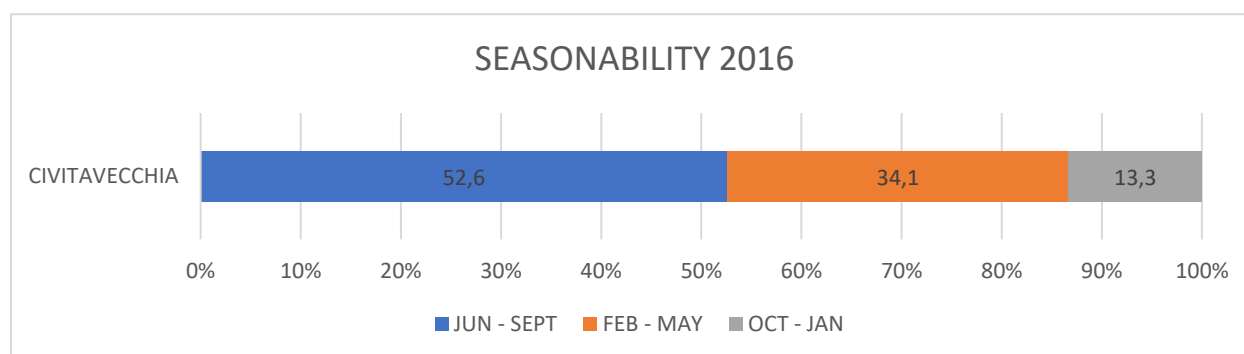


Table 8: Cruise market seasonality in the Port of Civitavecchia

In 2016 the average length of stay for a cruise ship in Civitavecchia and the calculated annual total crew members were around, respectively, 10.34 hours and 711,382.00 people.

Thanks to its proximity to Rome, the Port of Civitavecchia can boast high expenditure values during docking time for both single passenger and single crew member:

- Value per passenger: 68 euro;
- Value per crew member: 48 euro.

Civitavecchia has a remarkable amount of infrastructures for hosting cruise vessels and for handling passengers:

Technical features RCT	TERMIANL 10	TERMINAL 12 BS	TERMINAL 12 BN	New Terminal 12 Bis Nord	TERMINAL 25 S
Total Area	800 sqm	1,930 sqm	3,000 sqm	13,000 sqm	4,500 sqm
Luggage storage	600 sqm	1,280 sqm	2,000 sqm	3,000 sqm Ground floor	3,000 sqm
Check-in area	200 sqm	650 sqm	1,000 sqm	4,510 sqm First floor	1,500 sqm
Seats (min)	100	180	295	600	424
AC units	2	10	Internal system with outside units	Internal system with outside units	Internal system with outside units
Distance quay - terminal	10 m	10 m	60 m	20 m	20 m
Closest bollards to terminal	4	8	21	21	14
Fingers				2	

Table 9: Cruise terminals features in the Port of Civitavecchia

4. The Cruise Value Chain in Civitavecchia

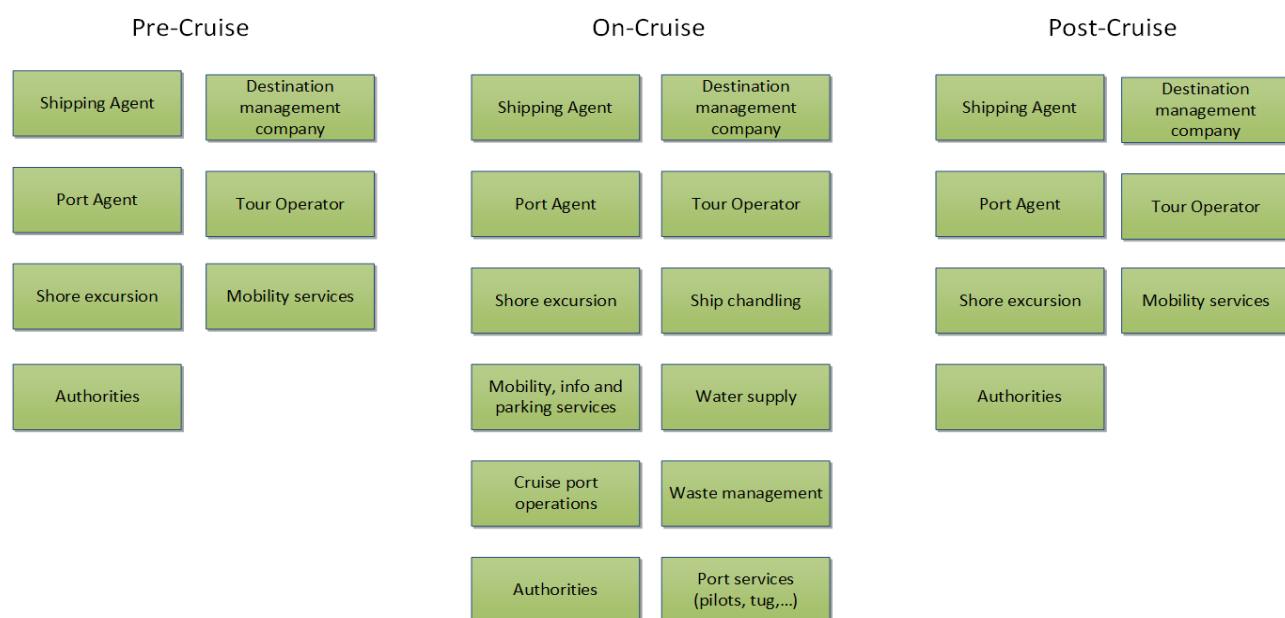


Table 10: Cruise Value Chain in the Port of Civitavecchia

The local Value Chain Stakeholders are:

SHIPPING AGENT	<ul style="list-style-type: none"> - Lorenzo Revello Shipping Agent; - Campostano Group; - Cemar; - Cambiaso Riso; - Medov; - ASC; - Bellettieri & C.
PORT AGENT	<ul style="list-style-type: none"> - Dock&Discover; - Intergroup; - Hugo Trumpy; - ASC.
SHORE EXCURSION AGENT/TOUR OPERATOR	<ul style="list-style-type: none"> - Medov; - Cambiaso Riso; - Charming Italy; - Cruising Rome; - Dock&Discover.
MOBILITY SERVICE COMPANIES	<ul style="list-style-type: none"> - FSI; - Hugo Trumpy; - Port Mobility; - Royal Bus.
AUTHORITIES	<ul style="list-style-type: none"> - Porti di Roma e del Lazio; - Ministero delle Infrastrutture; - Agenzia delle Dogane; - Guardia Costiera di Civitavecchia; - Città Metropolitana di Roma Capitale; - Regione Lazio; - Comune di Civitavecchia.
DESTINATION MANAGEMENT COMPANY	<ul style="list-style-type: none"> - RCT; - Agenzia Regionale del Turismo; - FEPAG La Rosa.
MOBILITY, INFO AND PARKING SERVICES	<ul style="list-style-type: none"> - Port Mobility.
SHIP CHANDLER	<ul style="list-style-type: none"> - Mediterranea; - Med Supplies; - Shipchandler Italy.
WATER SUPPLIER	<ul style="list-style-type: none"> - Port Utilities.
WASTE MANAGER	<ul style="list-style-type: none"> - S. E. Port.

PORT SERVICES (PILOTS, TUG...)	<ul style="list-style-type: none"> - Corporazione Piloti Porti di Roma; - Gruppo Ormeggiatori e Barcaoli Civitavecchia; - Rimorchiatori Laziali.
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Table 11: Cruise Value Chain stakeholders in the Port of Civitavecchia

From the analysis developed for Civitavecchia in A3.5, the following results come out about the actual situation of the Cruise Value Chain in the "Porte of Rome".

4.1 Economic indicators

The 33.33% of all the stakeholders operating in Civitavecchia presented a percentage about the range of gross margin with a value between the 15 and the 20%.

The 50% of stakeholders reported a range of growth value between 0 and the 0.5%.

Regarding the number of services/products offered, both the values "Over 7" and "between 5 and 7" were indicated by the 33.33% of companies interested.

The 50% of stakeholders indicated equal to the 5-10% of their total expenditures the percentage amount they spend on local enterprises.

Interesting analysis is the impact of this business kind on the employees involved.

The 66% of the companies interviewed stated that more than 50% of their direct employees assigned to their cruise activities are local.

More varied is the percentage subdivision regarding the indirect local employees: the total amount of stakeholders involved in the research are equally divided (33.33%) between three percentage ranges: "Over 50%", "between the 20 and the 50%", "between the 10 and 20%".

4.2 Environmental indicators

For the 66.66% of companies, in Civitavecchia there are waste reception facilities available at the port. This is an infrastructural component considered "very important" by the 44% of stakeholders.

No one company could reveal the volume of ship-generated waste delivered at port per year but it was possible to estimate the quantity of them recycled at the port: around the 20%.

Using a scale between 1 (negative) and 5 (very positive), the 40% of companies consider the impact of cruises to the local natural heritage as a 4 and another 40% as a 3.

The 50% stated that the share of the Lazio Region five most important and visited natural sites by cruise passengers that are designed for protections is only equal to the 5%, while the 25% stated that is the 90%.

Again, the 50% of companies stated that is again the 5% the share percentage of the destination's five most important natural sites that are significantly promoted through cruise tourism.

Sure it is between the stakeholders the idea regarding the availability or less of shore side electricity for cruises docked. More than the 66% of them declared the absence of this service in Civitavecchia.

All the companies (the 100%) are sure and declare the total absence of: shore side electricity provided using renewable sources, public transport fleet powered by electricity, excursion coach fleet powered by electricity and destination's electricity generated by renewable sources.

4.3 Societal indicators

Around the 25% of companies revealed that in the last three years they hired, for activities related to cruise market, around 10 new employees. Only the 12% of companies hired 8 new people.

For the 60% of companies that answered the question, the level of satisfaction of local residents with cruise tourism is "neutral".

Talking about accessibility levels, around the 80% of companies gave the judgments "scarce" or "very scarce" to the accessibility level of port infrastructure for cruise passengers with specific access requirements. Equal are the percentages and the considerations given for the accessibility level of public transport inside port for passengers with specific access requirements.

Also the intensity of the number of yearly local cultural events stimulated by cruise tourism is considered not sufficient. All the companies interviewed gave value "fair", "scarce" or "very scarce".

4.4 Cultural heritage indicators

The half of the stakeholders declared as "rather positive" the influence of cruise tourism on destination identity & cultural heritage.

The same amount of companies gave a percentage equal to 0 regarding the share of the destination's five most important traditional/cultural events that are significantly promoted through cruise tourism in Civitavecchia, Rome and Lazio Region.

Between the 90 and 100% is the value that most of stakeholders indicated as the share of the destination's five most important cultural/historical sites that are significantly promoted through cruise tourism.

Finally, regarding the accessibility level of cultural/historical sites for cruise passengers with specific access requirements in Lazio Region, the 60% of companies gave a neutral judgement. Even remaining answers run around values such as, at the end, they balance each other giving a final "neutral" value.

5. SWOT analysis of the Cruise sector in Civitavecchia

5.1 Introduction

In the next sub-paragraphs, it will be exposed the meaning and the utility of a SWOT analysis and its application to the Cruise Value Chain of Civitavecchia.

For the realization of this elaboration, considering previous reports, surveys and interviews, there were analysed the cruise environment, necessities and gaps characterizing the "Port of Rome".

5.2 THE SWOT ANALYSIS

The SWOT analysis is a tool that, describing the intrinsic features of a project and the background (at macro scale) in which it will be implemented, is used for the identification of elements relevant for developing alternatives strategies.

The SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) focuses on the environment affected by the project and highlights the internal factors (easier to monitor), that need to be compensated, taking into account the factors that are favourable or in contrast to the project (deriving from the external context).

When the analysis is under developing, the organization need to be realistic and needs to avoid any grey areas. Everything has to be analysed in relation to real-life contexts.

The SWOT generally is a simple analysis which avoids complexity and over-elaboration, and this can usually involve an excessive use of subjective information.

Companies should use it as a guide and not as a prescription.

The four voices that compose the analysis are:

- **STRENGTHS:** Elements in which an organization/plan excels and does well, qualities that separate it from its competitors. Description of all internal resources, skills, assets and valuable components.
- **WEAKNESSES:** Elements that stop an organization/plan from performing its optimum level. It includes all the company/plan lacks and what alternative competitors/plans do better.
- **OPPORTUNITIES:** Favourable factors that an organization/plan can use to increase its attractiveness and competitive.
- **THREATS:** Factors that have the potential to harm, to weak, to wreck a plan or an organization.

The four components are common to all SWOT analysis. However, many companies and plans consider also a segmentation of these into two subgroups: Internal and External.

Strengths and Weaknesses are typically considered internal factors. Commonly, they are the result of organizational decisions under the control of the decision maker team.

Similarly, emerging competitors or new innovative ideas would be categorized as a threat in a SWOT analysis for companies or plans. But, since there is very little it is possible to do about these, all this make them as external factor.

The subcategorization of the SWOT elements into Internal and External factors can facilitate and be helpful in determining next steps of the decision process.

	OPPORTUNITIES (external, positive)	THREATS (external, negative)
STRENGTHS (internal, positive)	STRENGTH-OPPORTUNITY strategies Which of the plan/company's strengths can be used to maximize the identified opportunities?	STRENGTH-THREATS strategies How can the plan/company's strengths be used in order to minimize the identified threats?
WEAKNESSES (internal, negative)	WEAKNESSES-OPPORTUNITY strategies What action(s) can be taken to minimize the plan/company's weaknesses using the identified opportunities?	WEAKNESS-THREATS strategies How can the plan/company's weaknesses be minimized in

		order to avoid the identified threats?
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Table 12: The SWOT analysis

The SWOT analysis is affected by three main limits:

- It is not suitable to create an organizational strategy; it exclusively identifies the key factors for its realization;
- The factors identified in the 4 voices could be affected by subjective judgements (which are responsible for evaluating the objectives). They could be too far or too much involved in the activities to be planned;
- It provides a static view of the context under study.

5.3 Evaluation and actions

Analysing and evaluating the Cruise Value Chain in Civitavecchia from the SWOT point of view, there were found the different elements and factors that can compose the four voices that characterize the analysis.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Presence of Rome and the entire Lazio Region as tourist destination; - Presence of railway line; - Port with large operative capacity for docking and managing the largest cruise ships; - Presence of cruise traffic all year long; - Cruise terminals and traffic managed directly by cruise companies; - More than 40 cruise companies that operate in the port; - Presence of direct providers for all services needed by cruise operations in port; - Long length of staying of cruise vessels; - High percentage of cruise passengers that decide to disembark for shore excursions; - High value of passengers' expenditures; - New passengers' cruise terminal. 	<ul style="list-style-type: none"> - Large distance from Rome; - Civitavecchia more as transit port than a home port; - Lack of transport infrastructures; - High utilization of coaches for transporting passengers; - Scarce accessibility inside port and tourist destinations for people with particular mobility necessities; - Scarce number and quality of cultural events at tourist destinations.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Realization of new cruise ship models more suitable for autumn and winter seasons; - New interest by cruise companies to realization of conditions for opening new cruise tours during "cold seasons"; - New energetic plans for next future in accordance with Regional and European environment protection programs; - Presence inside local Value Chain of highly specialized and with long tradition enterprises; 	<ul style="list-style-type: none"> - Growing of alternative ports and routes: North Europe and Asia; - Continuous challenge with Barcelona; - High dependency from Rome and its status; - Over-exploitation of Rome and its cultural heritage.

<ul style="list-style-type: none"> - New Civitavecchia Port railway station; - Improving the Civitavecchia Port Community System. 	
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Table 13: SWOT analysis in the Port of Civitavecchia

5.3.1 STRENGTHS

Most of the cruise traffic that every year dock in Civitavecchia owes its presence mainly to the magnificent cultural heritage of Lazio Region and, principally, of Rome. Rome alone receives the 79% of all the economic benefits that cruises generate and at least the 50% of all tourists docked in Civitavecchia. This is the main reason why cruise companies consider Civitavecchia as a fundamental port for their operations in the Mediterranean.

The high traffic generated by the Rome and Lazio tourist opportunities needs an adequate port infrastructure system.

The Port of Civitavecchia has available infrastructures able to adequately handle all the passenger processing phases and, at the same time, able to respect all the environmental protection and safety protocols. Today in Civitavecchia the largest and greatest cruise ships can dock without any problems, supported by appropriate berths capability and by suitable terminals functionalities for passengers processing.

	QUAY LENGTH	DRAUGHT	QUAY HEIGHT	BOLLARDS	KIND FENDERS
MIN	150 m	7.70	2.15	7	SC 1450
MAX	795 m	13.5	2.40	29	
MAX NUMBER OF PASSENGERS PER DAY			50,000		

Table 14: Docks features in the Port of Civitavecchia

The Port of Civitavecchia can count on a railway station which is only one km away from berths where cruises dock. The station of Civitavecchia gives the possibility to reach Roma Termini (the main Italian station), and the entire Italian railway network, in less than one hour. It is not casually that the railway line is the second most used mean of transport, after coach, by cruise passengers in Civitavecchia for their excursions.

The presence of adequate infrastructures, services and facilities make easier the developing and planning of cruises also during the more "anomalous" season for cruise market. In Civitavecchia, even if with really low percentages, around the 13,3%, it is present a cruise market also during autumn and winter seasons.

One of the most positive element of Civitavecchia, that shows its importance and consideration by cruise companies, is their direct presence, as shareholders, inside RCT (Rome Cruise Terminal), the company in charge to manage all the cruise side of the harbour.

The composition of RCT is an equal subdivision of shareholdings between the three main cruise enterprises operating in the Mediterranean: Costa Cruises, MSC Cruises and Royal Caribbean International. Each of them controls the 33.33% of the manager company.

A correct services' managing, an adequate operations handling and different well-done infrastructures can only provide a high request of port calls by cruise companies. And this is what happens in Civitavecchia where, with more than 750 calls every year, it is possible to find cruise ships from around 43 different companies.

The provision of adequate and correct services is due also to the high competence of the many different enterprises that operate in the Cruise Value Chain of Civitavecchia. All the necessary services for cruise ships at port are available in Civitavecchia and practically all of them are provided by a different specific company highly specialized in its business.

The availability of highly professional services united with the many different interesting and attractive tourist destinations of Lazio Region, entail a long staying for cruise ships docked at port. Indeed, the docking time in Civitavecchia runs around more than 11 continuous hours per each ship. Many hours mean long time for shore excursions for visiting the different attractions available in Lazio Region and in Rome. Surveys declare that the percentage of passengers that does not take part to land excursions when they are in Civitavecchia is around the 18%.

This element involves also a considerable passengers' expenditure value during excursions. Value that is generally over the European mean. Surveys detected that the average expenditure per passenger runs around 163 euro.

Since May 2018, with an investment of around 20 million of euro by Roma Cruise Terminal, the company in charge to manage the cruise sector in Civitavecchia, the "Port of Rome" has a new passenger terminal: 12 Bis Nord "Amerigo Vespucci". This new last generation terminal, with a total surface of 10,000 sqm, is one of the largest in Europe and one of the most functional. It gives the possibility to manage together all the passengers travelling with the largest cruise ships and consolidates the primary role of Civitavecchia in the world cruise industry. The structure is divided in three floors. The ground floor features passenger and luggage screening areas as well as the luggage hall. The first floor includes 60 check-in counter facilities, a VIP area with separate check-in counters, a bar and restaurant and ample seating space. Offices for terminal users are located both on the ground floor and the first floor. The spaces layout allows the chance to manage simultaneously the embark/disembark operations and all the operative phases necessary when ships are docked at quay. Two passenger bridges and a 200 metres passenger walkway facilitate the passenger movements and separate tourists from the service vehicle flows on the quays.

Together with the new cruise terminal, the Port Authority provided for the improvement and extension of the reception and handling centre for "independent" cruise tourists. The structure aim is to assistance and support to all those passengers that would remain in Civitavecchia or that would like to enjoy an experience different from the one offered by the different Tour Operators that operate inside the cruise ships.

5.3.2 WEAKNESSES

One of the weakness most reported by operators and tourists is the long distance existing between the port and Rome (around 45 km). This is a kind of problem which can partially be overcome with efficient and appropriate transport systems, but that unfortunately it will never be able to be completely erased. The local authorities can only partially mitigate the weakness realising always more suitable means for reaching the Italian Capital or pushing/inviting tourists to visit alternative destinations closer to Civitavecchia.

Maybe due to its direct low interest as real tourist destination, Civitavecchia is not a home-port but it is used more as a cruise transit port. There are some ships which use the Italian port as origin/end for their cruises, but they are really few compared to the total yearly amount of cruise calls and cruise passengers. In 2016, passengers used Civitavecchia as transit-port were 1,492,667, while the ones used the harbour as home-port were 847,009. This problem involves a relevant value of lost revenues due to all the logistic movements that could run around cruise ships that start/end a cruise since the beginning in that port. Other missed opportunities are the expenditures that cruise passengers could release in the local tourist business network, as in hotels or B&B. A tourist that is going to begin or end its cruise in that city is more invited to, maybe, spend one or more days in that city. This means and entails more money spent in accommodations, restaurants, shops, etc.

As already evident, transports and accessibility are two big problems that the Port Authority of Civitavecchia is trying to face since different years.

The lack of transport infrastructures is directly related to the high necessary time needed for reaching Rome from the port. The presence of the railway station is only partially a solution since in any case it is located one kilometre away from the port exit. People with mobility problems are always obliged to take at least one bus/coach for getting to Rome, directly or changing with train.

Bus and coach are both the most used means of transport for cruise tourists that dock in the main port of Lazio Region. The reasons for this preference are mainly two: the lack of information and the kind of shore-side excursion bought. Most of tourists are usual to buy an excursion package directly sold inside the cruise ship because it is easier, less stressful and because they are usually with all services included. Even the transport is included and, practically always, it is provided by coaches. Cruise companies (or the shore-excursions organizers which work for them) find easier and cheaper to organize all the tours using this transport system: it is less expensive, it looks better to customers/tourists' eyes and it gives less bureaucracy/organizational problems. Most of tourists do not know or, even, do not consider the railway alternative because it is shown to them as less comfortable, practical and useful for one excursion to Rome or for reaching other interesting cultural heritage sites in the region. This situation causes many problems to the various tourist destinations of Rome and of Lazio where it is possible to notice, especially in the city centres, a constant and chronicle problem of congestion due often the coaches traffic that does not fit at all with the high heritage value of these places.

Rome and Lazio owe their tourist fortune mainly to their high historical value as cultural and economic centres in the past. Figures that do not fit with these places anymore by now. In fact, different researches show that Rome and its region are not seen as attractive destinations for their present cultural proposals but, simply, for their past. Most of tourists, once visited Colosseum, Saint Peter and Musei Vaticani, do not consider interesting to return again in this part of Italy in future.

5.3.3 OPPORTUNITIES

In order to catch as much as possible more customers, different cruise operators are considering, every year more, the possibility to extend their operative seasonality. Technology and engineering are going in this direction realizing new ships with new features more suitable for winter and autumn seasons and that match better with customer requests during this less canonical period for cruises.

Civitavecchia has also the lucky of being located in one of the most suitable sea for cruises, not only during spring and summer, but also during winter and autumn. The Mediterranean is a closed sea where, during the "cold periods", temperatures and climate conditions are never so critical to compromise cruise operations and, in general, tourist activities.

Reading Regional and European proposals for environmental protection, there is a high tendency to find alternative and more friendly solutions for the entire maritime industry. In Civitavecchia there are planned, and some ready to be realized, new structures and facilities for the energy and electricity provision and management inside the port. Next years the Port Authority, in coordination with SNAM RETE GAS, the public company in charge to manage gas and methane pipelines in Italy, is going to realize a new deviation in the Italian gas network for feeding cruise ships docked in port. The purpose is to avoid all those pollutants due to auxiliary engines running during the berthing time for the provision of the fundamental services inside the ship (light, air circulation, heating, etc). With the direct shore-side provision of the necessary energy, ships will be able to switch off the auxiliary engines and to spare all the related harmful pollutants. Another project

for realizing an always more environmental friendly port is the realization of power generation plants that use the natural wave movements. All these projects are part of the Port Development Plan 2018 - 2020.

The port of Civitavecchia has a long and historic tradition in its past. It is the same for many of the companies that operate inside its borders for providing and managing all the services necessary for docked ships. These realities are a concentration of competencies, skills and knowledge reached after years of experiences, fusions, practices and activities. All this is an asset that the entire port community has to understand how appreciate and develop in order to use it into challenges that the Port has to deal with against the new harbours and markets ready to tackle this industry.

In the Port Development Plan 2018 - 2020 there are not only projects regarding the energetic field, but also proposals regarding the infrastructural capacity of the harbour from both the passengers handling and the port accessibility.

In order to reduce all the critical situations and conflicts that the actual rail-layout presents in the Civitavecchia intermodal-terminal, the Development Plan considers the realization of a wide reorganization of the entire railway network that runs around the harbour. Together with a new disposition of the freight terminal for handling cars and containers, with new rail lines, new junctions and new links, the Plan considers the construction of a new passenger station specific for the cruise traffic. The aim is to provide the port with a direct, rapid, efficient and sustainable mean of transport for getting to Rome, to Fiumicino Airport and to all the tourist destination in Lazio Region.

The Port Authority, in order to improve, optimize and refine all the operations that run around when ships are docked, started an assessment phase with all the stakeholders for creating a new Port Community System common platform. The aim is to realize a smarter harbour, where all the operations are better coordinated, managed and optimized. The passages between a phase to other, between a chain member to other, have to be automatized and improved for better provide products and services to customers. The Port Authority would like to realize a platform for managing in a more "systematic" way all the "appointments", where all the bookings, authorizations, custom operations and bureaucracy procedures are handled in a manner where the "transit coefficient" is the shortest possible and where the impacts of the "bottle necks" are minimal.

5.3.4 THREATS

Despite some analyses declare a reduction in the traction power by the Asian cruise market, different data forecast a deep mutation in the industry between now and the 2024, when more than six million of potential customers are expected to take part to a cruise in China, Korea and Japan. And if for now the "Asian risk" is sedated, new dangers can come from the North of Europe where, in the last five years, the market has continuously grown. The main and more interesting destinations are Germany (+11,3%) and UK - Ireland (+5,6%). Not by change it is here that different cruise companies are relocating their ships designated previously to operate in the Far East market.

The continuing risks coming from outside the Mediterranean Sea is not the only challenge that Civitavecchia has to deal with. Since different years, the Port of Rome is tackling a never-ending match with Barcelona for the leadership of the cruise market in the Mediterranean. A challenge that, if not well managed, can lead to different risky and dangerous situations. An example can be the risk of capacity overestimation. The continuous run behind new possible customers and tourist can bring the management to realize new infrastructures and facilities potentially useless and underused if not consciously planned. With a market share of the 18,3%, the Mediterranean is still the world second most chosen cruise destination after the Caribbean, but as different analysts are forecasting, in next ten years the global cruise market is going to

change, and both Civitavecchia and Barcelona are ready to realize significant and important infrastructure for trying to maintain their leadership.

Civitavecchia owes its fortune principally to Rome and its cultural heritage. Around the 50% of all cruise passengers which take part to a shore-side excursion have as final destination Rome, while only the 37% of tourists remain to visit Civitavecchia. The Port of Civitavecchia, despite the optimistic and hopeful plans for improving and expanding the cargo and freight terminals, is mainly and almost only a cruise transit port that do not have many others more market alternatives. Its high dependency from Rome until now has been its main fortune, but in the future, it could become a problem related with the Rome tourist attractiveness.

Millions of tourists every year visit the Roman cultural heritage, and many of these tourists disembark from a cruise ship docked Civitavecchia. As revealed by different articles and analysis this over-exploitation of the city can get in future to many different risks if this continuous tourist flow is not handled in the correct way and it is not controlled with the right caution. The municipal infrastructures, the local environment, the city inhabitants and the same cultural attractions and heritages are not able to sustain and support a never-ending number of tourists if they are not managed and planned properly.

5.4 SWOT Analysis conclusions

It is possible to notice how Civitavecchia, even if it is one of the most important, structured and well managed port in the Mediterranean Sea, still miss and need different actions for getting better performances in the Cruise business.

Surely there is already a fine base, reason why Civitavecchia is in the world top 10 ranking for cruise traffic, but in any case, there is still more to do for challenging an industry every day more competitive and more globalized.

Civitavecchia has to keep attention to Rome and its tourism market because the port is almost totally dependent to its fluctuations and its future.

The organization of shared and common boards should be set up with local and Regional authorities for together planning projects and activities with the purpose to get more attractive, interesting and important not only Rome but the entire Region around the Italian Capital.

Infrastructural kind plans should be even supposed in order to overcome those operative problems (as the managing of wastes, electric power, pollution and transports) which can help cruise companies, crews and local stakeholders to provide and receive a better service.

All the programs do not have to be set only as a solution for getting new market shares in the cruise business, but, forecasting new threats coming from next future, also for not losing present results already in hands.

Companies need plans for operating with a more efficient harbour, from both the infrastructural and organizational point of view (quays, software platforms, transports, etc).

While tourists need programs for practicing and appreciating more the experience they are living. They would like to enjoy Rome and Lazio Region with better and more efficient, comfortable and rapid services, without stress and wasting of time.

6. Action plan

6.1 Benchmarking of actions

The fruitful collaboration between industry and tourism operators, both local and global, together with local authorities, aiming the purpose of proposing new activities that valorise territorial quality, involve local entrepreneurs, show the local culture and encourage a more "friendly" tourism, has seen until now different positive examples.

The city of Naples offers a good example of a strategic collaboration between the Port Authority, the Municipality, the local Chamber of Commerce and a cruise line (MSC). In a joint operation called "Enjoy Naples", the city and the cruise lines presented a tourism agreed packaged to stimulate the pre- and post-cruise stays in the city. Ad hoc packages have been set up, involving also the local theatre San Carlo and the urban network of museums and artistic attraction. MSC obtained some docking facilitations and the city managed to launch a programme that somehow direct cruisers on the type of routes and local activities the city wanted to promote.

Outside Italy, two entirely private interesting experiences are the organizations Amsterdam Cruise Port and The French Riviera Cruise Club. For both the main purposes are the supporting cruise calls and the enhancing the role of the surrounding territories and their qualities.

Both the collaborations are not set up with mergers or major concession agreement with public entities, but simply considering the topic "regionalize the cruise benefits". with the purpose of valorising and proposing neighbouring regional destinations in situation of saturated capacity, as in Rome, and jointly promoting the ports hinterland.

The French Riviera Cruise Club is a perfect model: federating all those concerned with the destination 'Côte d'Azur', the club raises awareness about the cruise industry, provides relevant information to local and global operators, and invests in designing new hinterland excursions from the ports of Cannes, Nice and Villefranche-sur-Mer.

In conclusion, in a context of the increasing concentration and globalization that characterize both cruise lines and shoreside operators, the process of "taking advantages together" appears as a kind of natural co-evolution, where the different stakeholders of a touristic region unify their forces to face common challenges and to re-balance their bargaining relationship with global tourism operators.

The globalization is the reason that has pushed and is transforming the cruise traffic into one of the niche markets that has most grown in the international tourism sector.

As revealed and shown by different researchers, Port Authorities and all the stakeholders involved in the cruise sector have to face with one of the most dynamic, diffused throughout the world, and fastest expanding segment of the international tourist industry. This growing regards both cruise passenger demand and the supply of vessels which, with their greater ranges of cuisine and leisure, are trying to respond to the increasingly complex demands and motivations of both first-time and returning passengers.

With continuous new television apparitions and sales campaigns, that range from early bookings with a minimal booking fee to last-minute sales, especially on the Internet, cruises have become more common, they have stopped being a local phenomenon confined mainly to the Caribbean and Mediterranean Sea and they have spread throughout a number of geographical areas all round the world, from Alaska to Asia. This

great geographical expansion worldwide has also led to a rise, in the desire of port authorities and tourism organizations, to tempt them to new ports and to catch new market shares and possibilities.

Analysing other harbours experiences and elaborations, it is possible to catch and understand conditions that influence both the traffic a port will be able to attract in future industry conditions, and the evolution of this business at the ports where it is found now.

The likelihood of having cruise traffic seems to be linked to ports located in populous areas and close to large airports, important roads and railway networks. The situation is better if ports are not specialized in container traffic or, if this is present, it is located in a different, not interfering, port area. The infrastructures and facilities can be shared with regular ferry passenger traffic, but it is mandatory, at least for hosting the biggest present vessels, a minimum depth of berth and channels of around 12 meters. The amount of cruise traffic that ports are able to generate and host is also related to the population and availability of air connections in the areas where they are located, and to the tourist appeal of the area (as the hotels, attractions and environmental shape of the region). Very large it is also the importance of geographical factors, specifically 'site' and 'situation', for determining the port selection process in the cruise industry. The tourist appeal of the port's hinterland and, especially, its ability to generate profits through excursions, also has many supporters.

As regards to receptive conditions of a port, for passengers and ships, cruise operators perceive these as a close co-relation in respect to a harbour's superstructure and infrastructure guaranteeing a safe and longer stay in port. Harbour development plans can extend port limits and further improve access during different cruise conditions. Parallel with port development, it is necessary a simultaneous development of hinterland tourist attractions as a means of enhancing area attractiveness and of prolonging the season.

The increasing size of cruise season to "cold seasons" is an always more and more important topic for different cruise industry components.

More shore activities during winter means reduction of navigation time and increasing cruising amenities. Usually this branch/part of cruise industry implies more shore activities, a reduction of navigation time and an increasing cruising amenities. All these elements involve a deeper analysis, coordination and planning phase for the different chain components: during the cruising time, from the vessel point of view, and during the docking time, from the harbour point of view.

The pollution topic is an everyday increasingly felt topic by both population and authorities, this is why always more port administrations and cruise companies are trying to face with this issue using and creating different solutions and in different components of the industry.

From the port side, one of the arguments more discussed and engaged is the cruise waste treatment and the related needed facilities. Leaders in this field are ports of Baltic Sea and one of the most adopted system is the realization of direct connections between quays and the shore infrastructures for handling wastes. Two examples are the Port of Helsinki and the Ports of Stockholm which have quay infrastructures that allow to discharge the grey and black waters directly from the vessel to the city sewage systems. The capacity of sewage system is approximately 80 - 100 m³/hour.

The efficient wastewater facilities at the Ports of Helsinki and Stockholm receive all wastewater without extra charges or other restrictions and this is the reason why an analysis conducted in 2017 can show how in these ports, the wastewater discharges grow up in the four-years period 2010-2014 at the expenses of the close ports of Copenhagen and Tallinn. Analysis reveals that at the end of 2014 in Helsinki and Stockholm the

amount of received wastewater is remarkably higher than the number of cruise passengers that docked in the two cities.

Cruise companies are facing with the pollution problem realizing, in collaboration with shipbuilders, always more less polluting vessels, and planning, in collaboration with local tour-operators, shore-excursions more environmental friendly. Costa Group (Costa Cruises and Aida Cruises) has already commissioned to Meyer Werft three new vessel powered by Liquefied Natural Gas (LNG). The first of them, AIDAnova, will start to operate in winter 2018. Companies as MSC and NCL have already in their catalogues shore-excursions proposes provided with means of transports completely electric or hybrid. An example is the tour of NCL in Granada (Malaga) where, riding an electric and solar-powered mini train, it is possible to visit the local Automobile Museum without releasing pollutants in the air. This is a solution, proposed by the Norwegian company, appositely for tourists that would care about the environmental topic.

6.2 Action Plan for the Port of Civitavecchia

Plans that could be developed for getting a better Value Chain in the Port of Civitavecchia:

- Increasing the tourist visibility and attractiveness to all other tourist destinations in Lazio Region;
- Disincentivize and discourage the use of bus for getting to Rome and increase the attractiveness of railway;
- Invite tourists and operators to use the more "environmental friendly" transport systems, where available, for getting to tourist destinations of Lazio Region;
- Increase the institutional relations and collaborations between the Port Authority and the political and decisional local bodies (as the Lazio Region and Rome Municipality);
- Realization of direct pipeline system connections for ships docked to harbour quays;
- Realization and planification of projects and infrastructures for getting the benefits of cruises during "cold seasons";
- Changing of management vision and targets, a view more global than local for the future port challenges;
- Cultural offer for cruise tourists;
- Commercial offer for cruise tourists;
- Specific package of services and products for crew members;
- Communication program for informing cruise tourist how to enjoy the cultural heritage without ruining it.
- Renovate the local shuttle bus service.

A collaboration between Regional Tourist Board, Port Authority and Tour Operators that operate in the Cruise Sector should plan and realize a project for promoting and incentive all the different and less famous possible tourist destinations present in Lazio Region. This project would bring to a double positive result: a deeper spread of useful effects of cruise market in all the region, and a reduction of negative effects that cruise tourist business is causing in the most famous destinations of Lazio (es. tourist over-exploitation in Rome).

The Port Authority should plan a program for changing the utilization shares of transport systems for reaching the different locations visited during shore-side excursions. Tourist and operators should be invited to avoid the utilization of more pollutant transport systems for getting to those tourist destinations where there are already available more "friendly" alternatives.

The Port Authority should draw up a deep collaboration with all the main political and administrative bodies of the Region for finding a solution for all the different problems that now and in the future will be related with cruise tourism and local environment. For example, one of the possible problem which need a "political" solution is the relation between Rome, its citizens, its tourist destinations and the thousands of passengers that dock in Civitavecchia every day.

Pipelines for feeding cruise ships docked in Civitavecchia are already planned to be realized. In order to achieve an even more "friendly" port, there should be considered the realization of pipelines directly connected with the quays for all the operations of discharging of wastes and garbage. This operation now is realized with the utilization of trucks and vans.

The market, as already revealed, is getting the direction of increasing the length of cruise season also during "cold seasons". Cruise companies and ship construction yards are developing specific systems for cruising also during these conditions and the Mediterranean Sea suits correctly for this tendency. The Port Authority should realize, together with all the stakeholders involved into the cruise business, a program of plans and investments for better match the port, the infrastructures and the services with this new branch of cruise industry.

Port Authority has to change its target vision, no more a simply "local" vision as leader into Mediterranean Sea but, in an always more "global cruise market", a vision where real actual and future competitors are no more inside the Mediterranean Region but all around the world. This change of view has to be also into future investments, projects and visions. The Port has to set its plans no more looking to its local competitors, they do not have to be anymore the worries conditioning investments and projects. The Port Authority has to organize its future looking outside the European borders, looking how the market is changing in the other continents and oceans, and then, using these new and useful information, it has to set its new horizon.

The Port Authority should push the local cultural bodies and entities to organize and realize a cultural proposal that better match with tourist of cruise world. Their features require different and more particular elements that often do not fit with common and ritual cultural offer typical for common tourists. Combining this target with the one related to the development of programs for the "cold seasons", it could be planned and realized also a cultural proposal more specific for winter and autumn cruise passengers.

Cruise tourists should be carried through a specific commercial offer typical for their situation. Surely, they cannot be treated as normal tourist due to their typical and more limiting features. Commercial boards and associations and the Port Authority should organize together a commercial offer and a package of services and experiences that can give the opportunity for cruise passenger to enjoy as much as possible their shore-time.

Port Authority, together with crew member associations and Cruise companies should realize a package of services, products and offers specific for cruise crew members. People that often need to enjoy their shore-time for resting after days absorbed under mountain of work and hundreds of cruise customers. They need a specific group of services that gives them to possibility to retake themselves.

The cruise tourism is a kind of experience typically "hit and run" where the tourist often, in order to enjoy the short time, it has in that specific location, does not care too much of the place that it is visiting. The regional tourist board and the Port Authority should write and publicize a "manual of the correct cruise tourist" where there is explained how to live its experience in Lazio locations without leaving a negative footprint in the environment visited.

Different surveys and researches revealed that one of the most criticized negative element which cruise tourists have to experience every time is the shuttle bus service provided inside the port. From both the point of views of services provided and the buses utilized. The Port Authority, together with the service provider, has to reorganize and renovate, in coordination with the new railway services that will be planned and the new environmental policies, the entire bus service that operates in Civitavecchia and Lazio Region.

ACTION	STAKEHOLDERS	TIME FRAME	RESOURCES AND FINANCE
Increasing the tourist visibility and attractiveness to all other tourist destinations in Lazio Region	Port Authority, Lazio Region, local authorities	Medium	€€€€€
Disincentivize and discourage the use of bus and increase the attractiveness of railway	Port Authority, Lazio Region, Mobility and info service providers	Medium	€€€€€
Invite tourists and operators to use the more "environmental friendly" transport systems for getting to tourist destinations of Lazio Region	Port Authority, Shore excursion operators, Mobility and info service providers	Medium	€€€€€
Increase the institutional relations and collaborations between Port Authority and the political local bodies	Port Authority, Lazio Region, local authorities	Medium	€€€€€
Realization of direct pipeline system connections for ships docked to harbour quays	Port Authority, Waste management company	Long	€€€€€
Realization and planification of projects and infrastructures for getting the benefits of cruises during "cold seasons"	Port Authority, Cruise companies	Long	€€€€€
Changing of management vision and targets, a view more global than local for the future port challenges	Port Authority	Short	€€€€€
Cultural offer for cruise tourists	Local authorities, Shore excursion operators, Destination management companies	Medium	€€€€€
Commercial offer for cruise tourists	Shore excursion operators, Destination management companies, Local shops board	Medium	€€€€€
Specific package of services and products for crew members	Cruise companies, Destination management companies, Local shops board	Medium	€€€€€
Communication program for informing cruise tourist how to enjoy the cultural heritage without ruining it	Port Authority, Local authorities, Lazio Region, Shore excursion operators	Short	€€€€€
Renovation the local shuttle bus service	Port Authority, Mobility and info service providers	Long	€€€€€

Legend: Short= 1-2 years, Medium: 2-5 years, Long: 5-10 years

Table 15: Actions for the Port of Civitavecchia

ACTION	STAKEHOLDERS	RESOURCES AND FINANCE	TIME FRAME		
1. Political/managerial actions			S	M	L
1.1 Increasing the tourist visibility and attractiveness to all other tourist destinations in Lazio Region	Port Authority, Lazio Region, local authorities	€€€€€			
Increase, with the use of all the possible communication systems, all the different and less famous tourist destination in Lazio Region.					
1.2 Changing of management vision and targets, a view more global than local for the future port challenges	Port Authority	€€€€€			
More attention in the "Port Authority mind" about what happens in the cruise industry outside the Mediterranean region. It has to set its future with this vision kind.					
1.3 Increase the institutional relations and collaborations between Port Authority and the political local bodies	Port Authority, Lazio Region, local authorities	€€€€€			
Set up a closer relation and collaboration between Port Authority and all the local authorities for handling together all the problems related with cruises in Civitavecchia.					
2. Environmental actions					
2.1 Disincentivize and discourage the use of bus and increase the attractiveness of railway	Port Authority, Lazio Region, Mobility and info service providers	€€€€€			
Port Authority should create a dissimulation program for inviting tourists and Tour Operators to use the railway line for getting to Rome.					
2.2 Communication program for informing cruise tourist how to enjoy the cultural heritage without ruining it	Port Authority, Local authorities, Lazio Region, Shore excursion operators	€€€€€			
Creating a communication program for educating tourists about how to reduce their impact (the "hit and run" tourism kind) on environment and cultural heritage.					
2.3 Invite tourists and operators to use the more "environmental friendly" transport systems for getting to tourist destinations of Lazio Region	Port Authority, Shore excursion operators, Mobility and info service providers	€€€€€			
Creating a program for informing and inviting tourists and Tour Operators about the alternative and more environmentally friendly means of transport for getting tourist destinations in Lazio Region.					
3. Commercial and cultural actions					
3.1 Cultural offer for cruise tourists	Local authorities, Shore excursion operators, Destination management companies	€€€€€			
Port Authority should push local cultural bodies for the realization and organization of a cultural proposal that could fit to special cruise tourist needs.					
3.2 Commercial offer for cruise tourists	Shore excursion operators, Destination	€€€€€			

	management companies, Local shops board				
Cruise tourist cannot be treated as normal tourists, they need a specific commercial offer realized by Port Authority and local commercial entities.					
3.3 Specific package of services and products for crew members	Cruise companies, Destination management companies, Local shops board	€€€€€			
Port Authority, together with crew member associations and Cruise companies should realize a package of services, products and offers specific for cruise crew members.					
4. Infrastructural actions					
4.1 Renovation the local shuttle bus service	Port Authority, Mobility and info service providers	€€€€€			
The mobility services provider, together with the Port Authority, has to renovate the entire shuttle bus service (vehicles, infrastructures and plans).					
4.2 Realization and planification of projects and infrastructures for getting the benefits of cruises during "cold seasons"	Port Authority, Cruise companies, utilities service providers	€€€€€			
Realization of services, infrastructures and plans necessary for getting the benefits of the increasing length of cruise season during autumn and winter.					
4.3 Realization of direct pipeline system connections for ships docked to harbour quays	Port Authority, Waste management company	€€€€€			
Realization of a pipelines network system for connecting docks and shore-side handling facilities, especially for managing cruise vessels waste.					