Realized by

RISPOSTE TURISMO

on behalf of

LUKA KOPER Port of Koper

"THE PASSENGER TERMINAL OF THE PORT OF KOPER: PROSPECTS OF DEVELOPMENT IN CRUISING"

Project carried out under the WP3 of Adria project (Accessibility for the revival and development of the Adriatic internal) funded under the Cross-Border Cooperation Programme Italy - Slovenia from 2007 to 2013, by the European Regional Development Fund and national funds .

Projekt ADRIA A - sofinanciran v okviru Programa čezmejnega sodelovanja Slovenija-Italija 2007-2013 iz sredstev Evropskega sklada za regionalni razvoj in nacionalnih sredstev.

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Ministero dell'Economia e delle Finanze

ADRIA A — FOR METROPOLITAN INTEGRATION / PER L'ACCESSIBILITÀ METROPOLITANA / ZA CELOVITO MEDMESTNO POVEZAVO

2007-2013 cooperazione territoriale europea programma per la cooperazione transfrontaliera Italia-Slovenia
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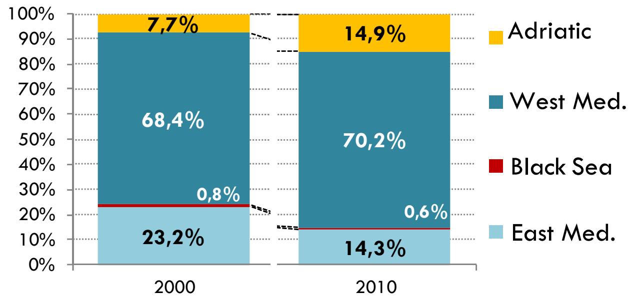
THE PASSENGER TERMINAL OF THE PORT OF KOPER: PROSPECTS OF DEVELOPMENT IN CRUISING

CRUISE TRAFFIC IN ADRIATIC	**A**	*Structure and traffic trends in the Adriatic. Koper compared to other ports.*
CRUISE OFFER IN THE MED AND NORTH ADRIATIC	**B**	*The deployment options of cruise lines, routes and itineraries in the Mediterranean and Adriatic seas, the factors of choice of port calls and destinations.*
CRUISE DEMAND FOR KOPER AND NORTH ADRIATIC	**C**	*Demand dynamics of cruising in Koper and some assessments about relevant markets.*
PASSENGER TERMINAL OF KOPER AND DEVELOPMENT PLANS OF OTHER CRUISE PORTS	**D**	*The current features of the Koper terminal, the comparison with other cruise ports in the area and a review of the investment plans in different areas of the cruise industry world.*
PROSPECT OF DEVELOPMENT IN CRUISING FOR KOPER CRUISE PORT	**E**	*Key issues for the future of the cruise industry, opportunities and priorities for the future work of Koper as a port of call, home port or interport for the cruise itineraries in the Mediterranean.*

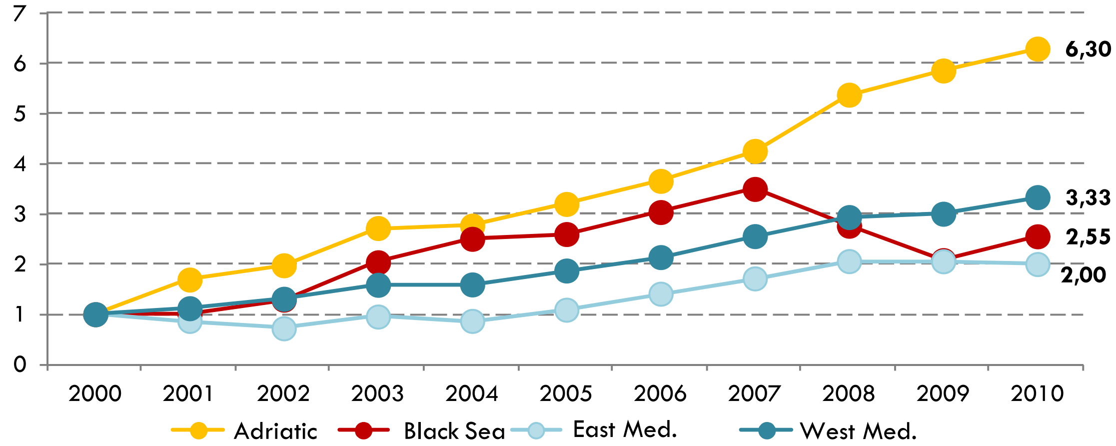
THE ADRIATIC SEA IN THE MEDITERRANEAN CONTEXT

CRUISE TRAFFIC (PAX MOVEMENTS) 2000-2010 TREND IN THE 4 MEDCRUISE MACROAREAS



Source: Medcruise Statistic Report 2011
(data referred to 69 MedCruise Members).

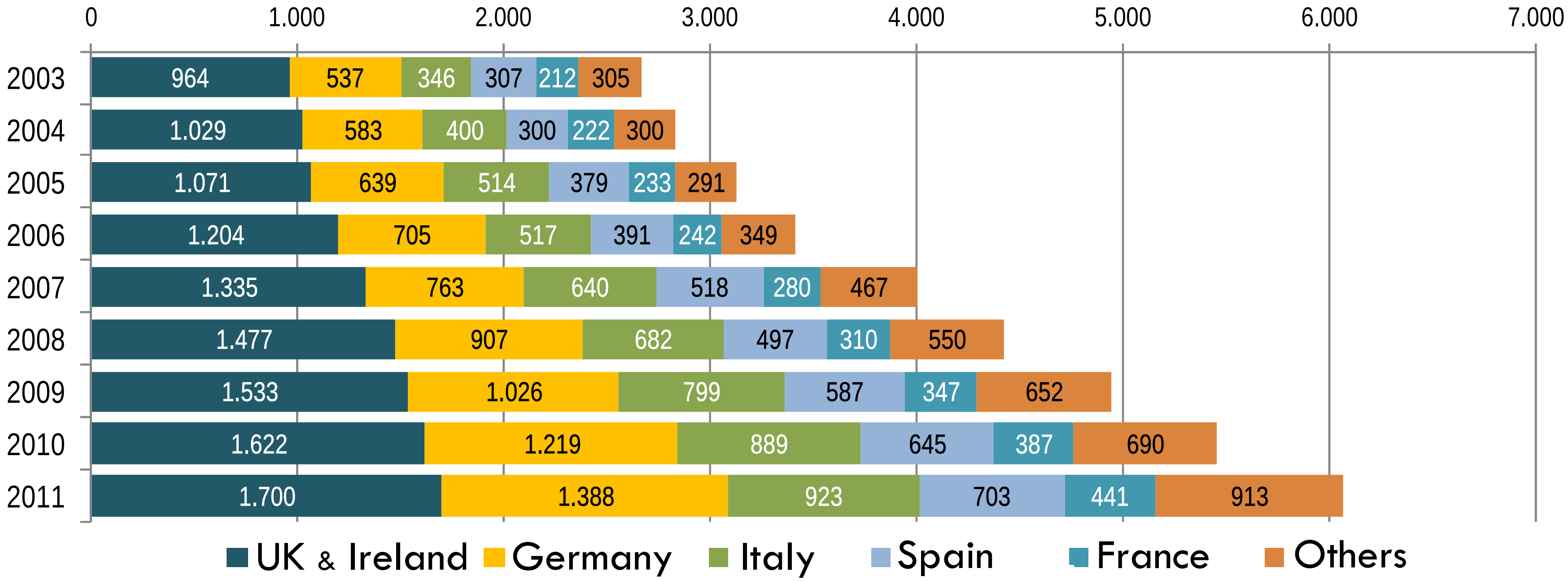
GROWTH IN THE 4 MEDCRUISE MACROAREAS 2000-2010 TREND VALUE INDEX YEAR 2000 (2000 = 1)



Source: Medcruise Statistic Report 2011 (data referred to 69 MedCruise Members).

EUROPEAN CRUISERS

GROWTH OF EUROPEAN MARKETS (2003-2011)



Source: European Cruise Council

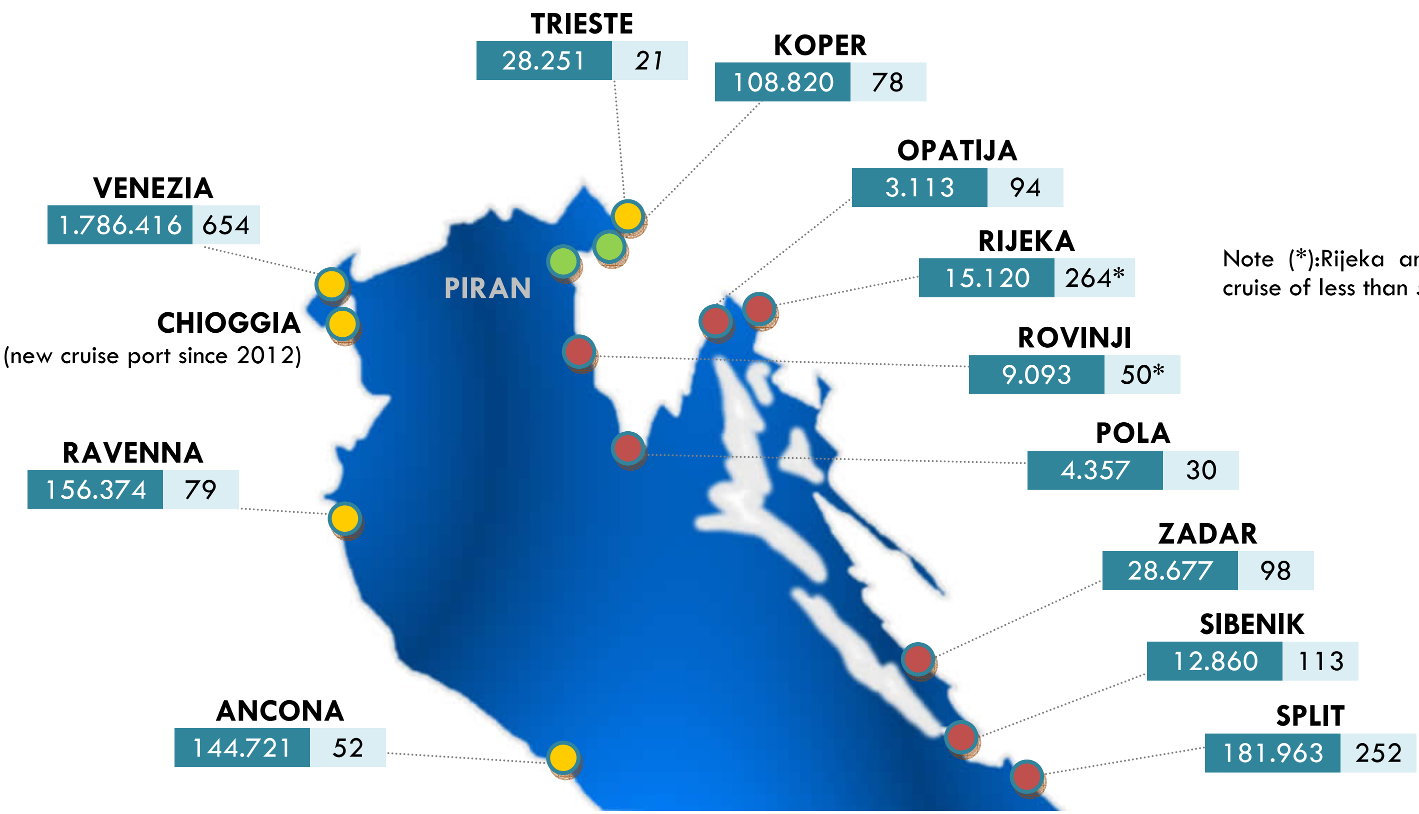
THE MAIN 5 SOURCE COUNTRIES REPRESENT 85% OF CRUISERS

CRUISE DEMAND: CENTRAL EUROPE MARKET

Country	Population (2011)	Share % abroad travels	Estimates on market size depending on penetration rate			Income per capita: 2010 value in euro*		Income per capita: variations %	
			0,5%	1%	1,5%	nominal	real	2010 su 2009	2011 su 2010*
Slovenia	2.050.189	59,14%	10.251	20.502	30.753	17.300	15.300	0,7%	0,0%
Austria	8.404.252	49,14%	42.021	84.043	126.064	34.100	31.400	2,3%	2,6%
Slovakia	5.435.273	35,72%	27.176	54.353	81.529	12.100	8.900	3,5%	3,8%
CZ Republic	10.532.770	23,23%	52.664	105.328	157.992	14.200	11.400	2,7%	0,9%
Hungaria	9.985.722	22,94%	49.929	99.857	149.786	9.700	8.800	1,2%	2,3%
Poland	38.200.037	16,14%	191.000	382.000	573.001	9.300	8.100	3,9%	n.d.
Romania	21.413.815	6,49%	107.069	214.138	321.207	5.800	4.200	-2,3%	n.d.

Elaborations by Risposte Turismo on Eurostat data, 2012 (Rif. Tab. “demographic balance and crude rates”, “number of tourism trips” and “GDP per capita - Annual Data”)

THE CRUISE TRAFFIC IN NORTH ADRIATIC SEA (2011)

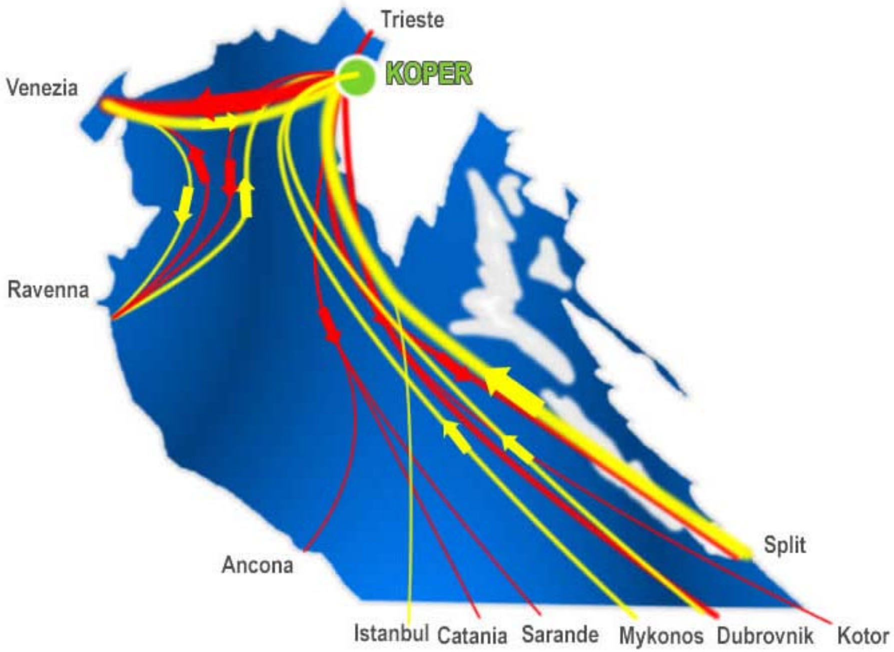


Note (*):Rijeka and Rovinji include cruise of less than 50pax.

VENEZIA ROLE: 70% OF PAX MOVEMENTS BUT ONLY 37% OF CRUISE CALLS

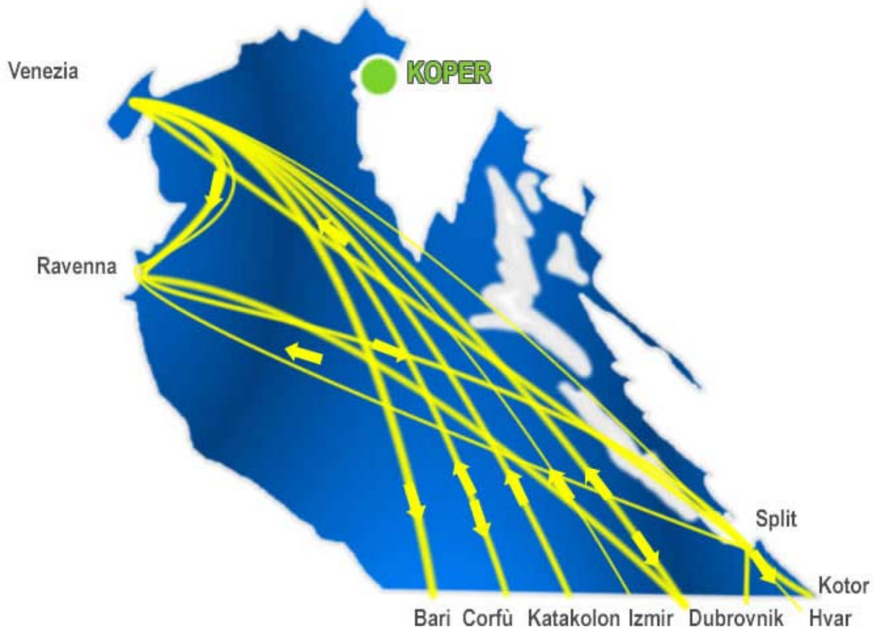
ADRIATIC ITINERARIES

EXAMPLES CALLING KOPER



Ships calling in Koper are always a pre or post Venice (apart when Ravenna is among them)

SAME CRUISE SHIPS WHEN SKIPPING KOPER



Venice is always present, sometimes Ravenna but cruise ships skip northern-central Adriatic

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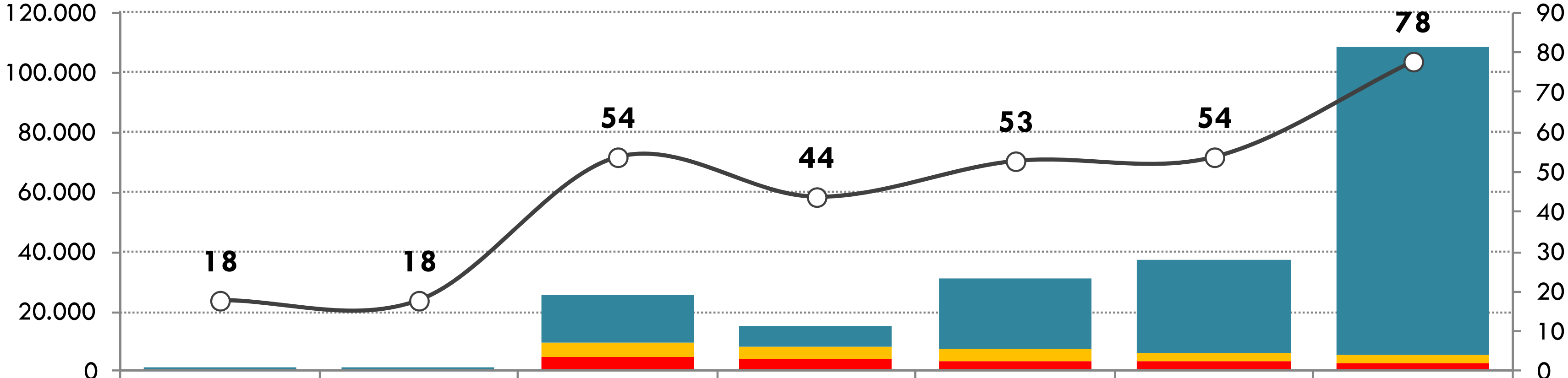
KOPER CRUISE TRAFFIC

CRUISE PASSENGER TRAFFIC EVOLUTION IN KOPER (2005-2011)



	2005	2006	2007	2008	2009	2010	2011
Transit	1.100	1.614	16.008	7.213	23.658	30.855	103.505
Disembarks	0	0	4.901	4.048	3.834	3.226	2.883
Embarks	0	0	4.671	3.985	3.529	3.183	2.432
Cruise Calls	18	18	54	44	53	54	78

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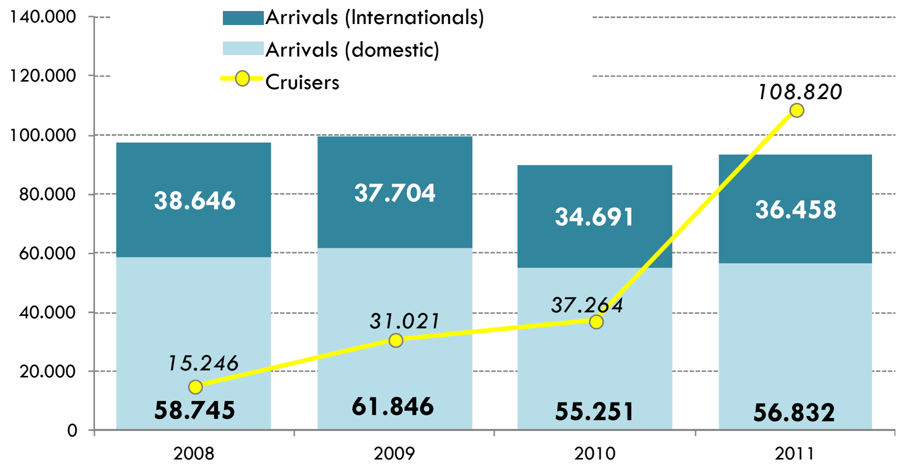
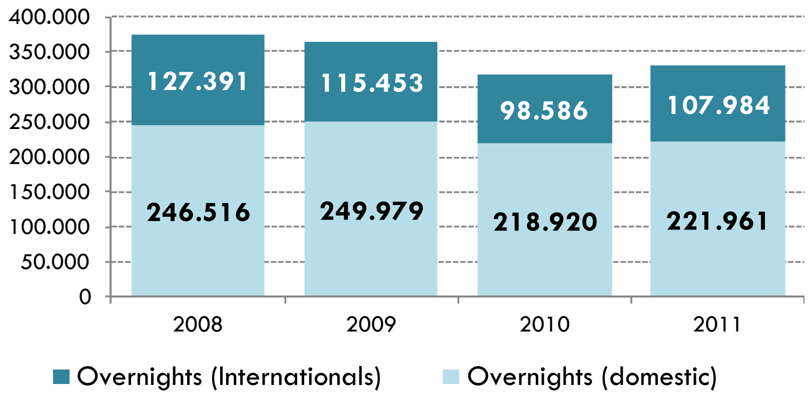
CRUISE TOURISM ROLE VS TOURISM IN KOPER

TOURISM AND CRUISE TOURISM IN KOPER



HOTEL OVERNIGHTS SOURCE IN KOPER DOMESTIC vs INTERNATIONAL



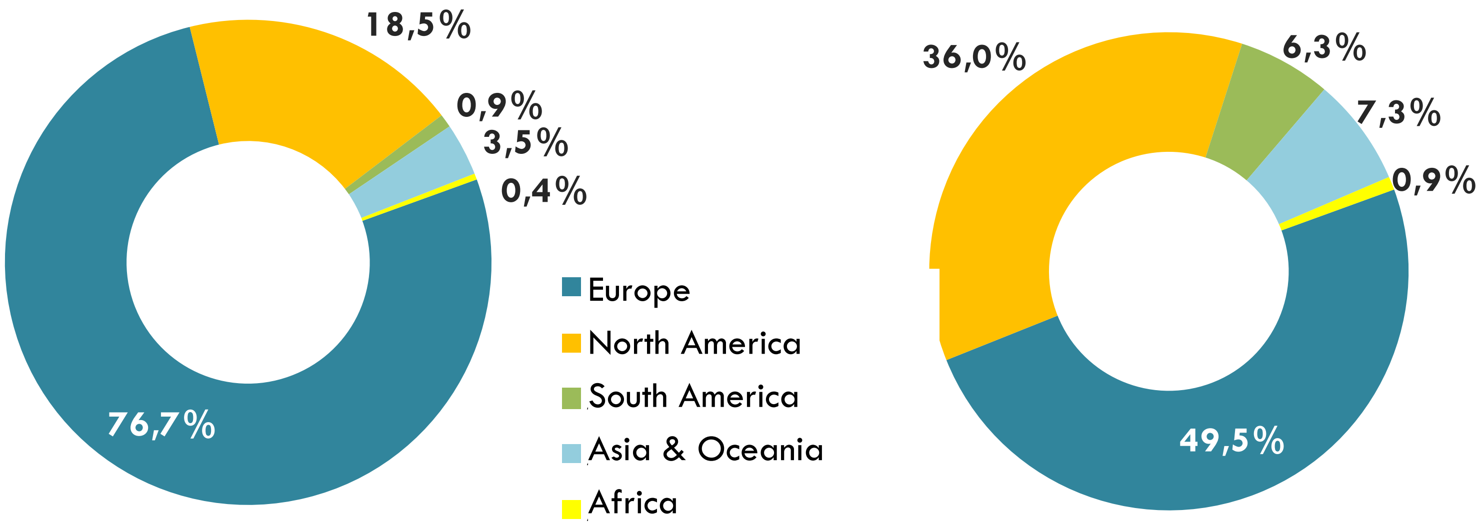
Source: Statistični urad Republike Slovenije

CRUISERS PASSED, IN 2011, THE TOURIST ARRIVALS

CRUISERS HAVE TO BE CONSIDERED AS INTERNATIONAL ECONOMIC ADDED VALUE

CRUISE PASSENGERS NATIONALITY IN KOPER

COMPARING CRUISE SOURCE MARKETS 2010 (left) AND 2011 (right)



A DAY BY DAY WORK WITH CRUISE REPRESENTATIVES LEADS TO ENRICH THE QUALITY OF PASSENGERS AND REDUCE THE DEPENDANCE ON FEW MARKETS

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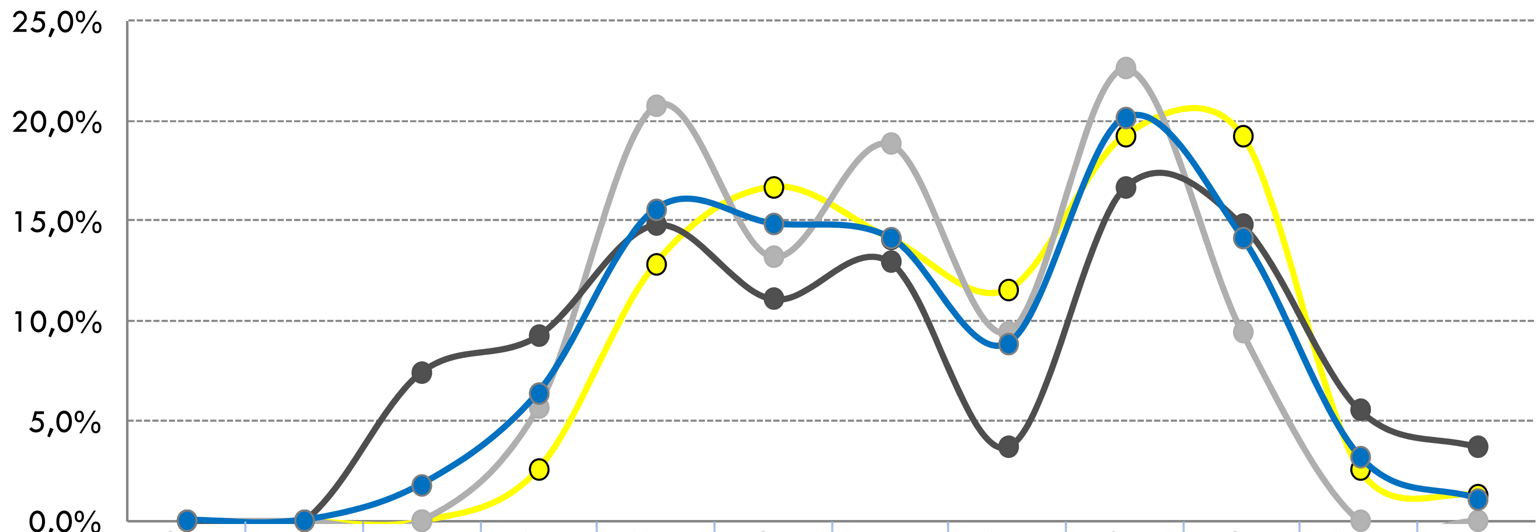
MONTHY SEASONALITY: CRUISE CALLS IN KOPER IN LAST 5 YEARS



	Gen	Feb	Mar	Apr	Mag	Giu	Lug	Ago	Set	Ott	Nov	Dic
2011	0,0%	0,0%	0,0%	2,6%	12,8%	16,7%	14,1%	11,5%	19,2%	19,2%	2,6%	1,3%
2009	0,0%	0,0%	0,0%	5,7%	20,8%	13,2%	18,9%	9,4%	22,6%	9,4%	0,0%	0,0%
2007	0,0%	0,0%	7,4%	9,3%	14,8%	11,1%	13,0%	3,7%	16,7%	14,8%	5,6%	3,7%
Avg. 5 anni	0,0%	0,0%	1,8%	6,4%	15,5%	14,8%	14,1%	8,8%	20,1%	14,1%	3,2%	1,1%

FROM 2007 TO 2011 CRUISE SEASON STARTS LATER BUT LASTS A LITTLE BIT LATER TOO

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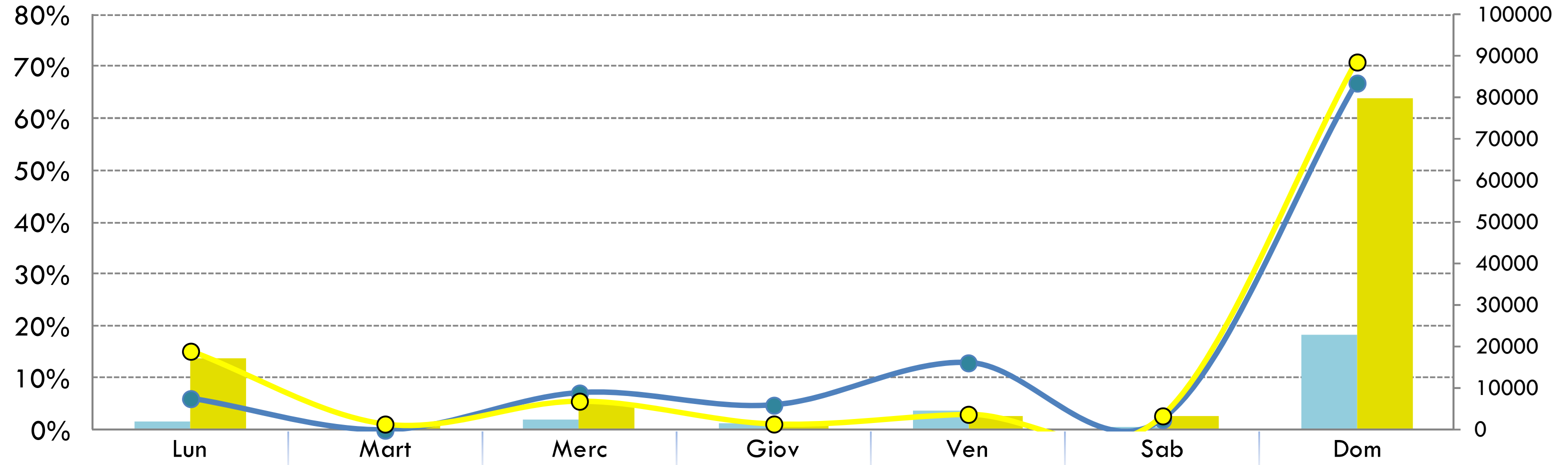
WEEKLY SEASONALITY: CRUISERS IN KOPER IN 2010 AND 2011



	Lun	Mart	Merc	Giov	Ven	Sab	Dom
Cruisers 2010	2090	0	2461	1654	4457	705	22957
Cruisers 2011	17141	1340	6300	1358	3454	3120	79875
Share % 2010	6,1%	0,0%	7,2%	4,8%	13,0%	2,1%	66,9%
Share % 2011	15,2%	1,2%	5,6%	1,2%	3,1%	2,8%	70,9%

HOW TO EVALUATE THE PROSPECT DEVELOPMENT IN CRUISING OF KOPER?

OPPORTUNITIES?

PRIORITIES?

SCENARIO ELEMENTS IN SHORT AND MIDDLE-LONG TERM

	SHORT TERM (2012-2015)	MIDDLE-LONG TERM (2015-2025)
DEMAND	Hi interest of new customers. Weakening of European markets.	More people not anymore first time cruiser.
OCCUPATION RATES	Over 100%	Future demand, new markets to fulfill
NEW SHIPS BUILDING	Slowing down. Competition on conquering the existing ones	Using old ships to create local brands
DEPLOYMENT	Winter in Mediterranean (large exploitment during last years).	Panama channel complete (2014). South Asia development.
COMPETITION AMONG TERMINALS	Competition with already built terminals (Trieste and Ravenna that now invest a lot in promotion and commercialization).	Other terminals? (i.e. Pola, Rijeka e Rovinji)
NEW TERMINALS	Promotion and relation with companies are more and more needed.	Port performances evaluations not strictly related to infrastructures.

IN THIS SCENARIO
WHY CALLING IN KOPER?

> Mediterranean climate (season long)
> Tourism attractions
> Historic center within walking distance
> Variety of tours and excursions
> Fly & cruise opportunities
> Close cruise markets (catchment area)
> Shuttle bus to nearby destinations
> Dedicated quay to cruise ships
> Reduced distance from other ports in the area
> Embarkation and disembarkation procedures (incl. luggage & XRAY)

SHOULD WE CONSIDER THEM AS COMPETITIVE ADVANTAGES?

ARE THEY ALSO OWNED BY CLOSE CRUISE PORTS?

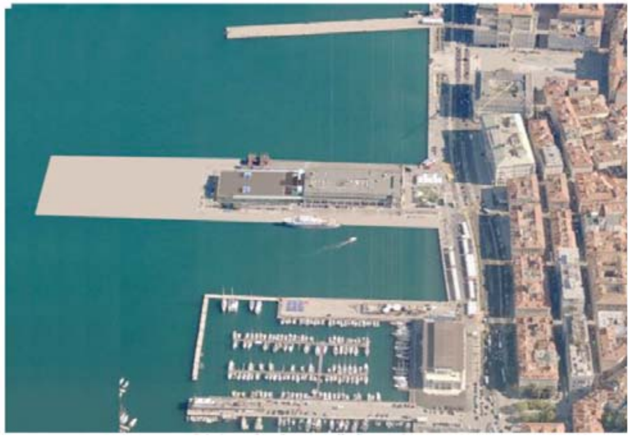
SOME APPARENT COMPETITIVE ADVANTAGES FOR KOPER PORT AND DESTINATION

HISTORIC CENTER WALKING DISTANCE
VARIETY OF TOUR & EXCURSIONS
FLY & CRUISE OPPORTUNITIES
CATCHMENT AREA (MARKETS CLOSE BY)

THEIR POSSESSION MAY NOT NECESSARILY TRANSLATE INTO A COMPETITIVE ADVANTAGE FOR KOPER

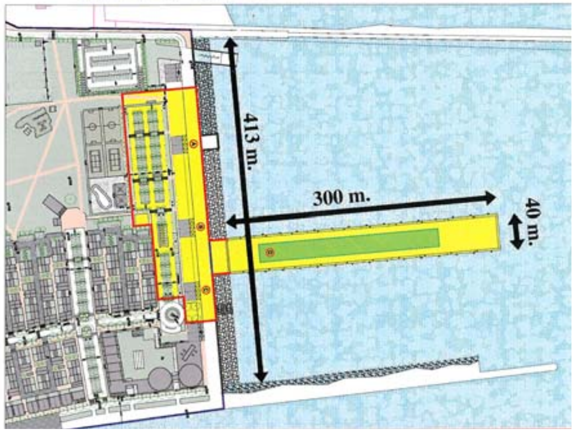
NORTH ADRIATIC: AMONG WORK-IN PROGRESS AND PROJECT IDEAS

TRIESTE



Development of "Molo Bersaglieri"
Started in 2007

RAVENNA



25mln Euro: new Porto Corsini terminal
open since April 2011

PULA

Development plans

SEVERAL PORTS ARE INVESTING IN NORTH ADRIATIC
NOT ONLY IN TERMINALS BUT ALSO IN ENHANCING THE EMBARK/DISEMBARK EXPERIENCE
(I.E. SERVICES, AESTETHIC OF THE PORT AREA)

SOME CRITICALITIES OF KOPER PORT (IN CRUISING ACTIVITIES)

OPERATIVE COSTS
AIR CONNECTIONS
PORT SCENERY
DEDICATED QUAY FOR CRUISE SHIPS
EMBARK AND DISEMBARK PROCEDURES
RIGIDITY IN CUSTOMS OPERATIONS

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POSSIBLE STRATEGIC OPTIONS FOR KOPER IN THE CRUISE PORT SCENARIO

Port of Call

Strengthening all the activities and interventions that already characterize the port, recognizing all the potential of a port of call, leaving any inclination (and intervention) to act as home port.

Home port

Home port solo piccole navi

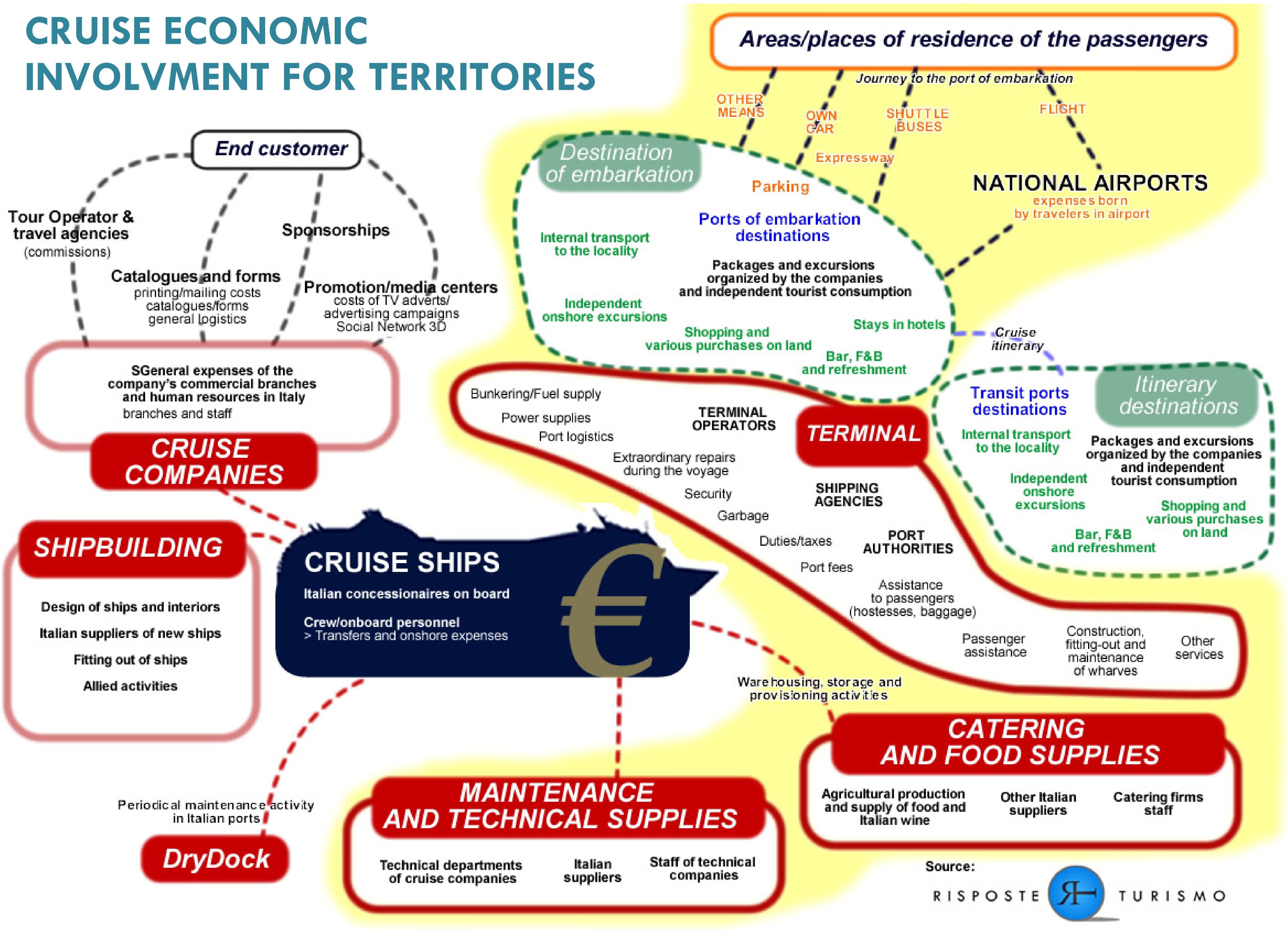
Home port tutte le navi

Apply to be considered home port for ships of new generation or specializing in this role only for ships of small-medium size.

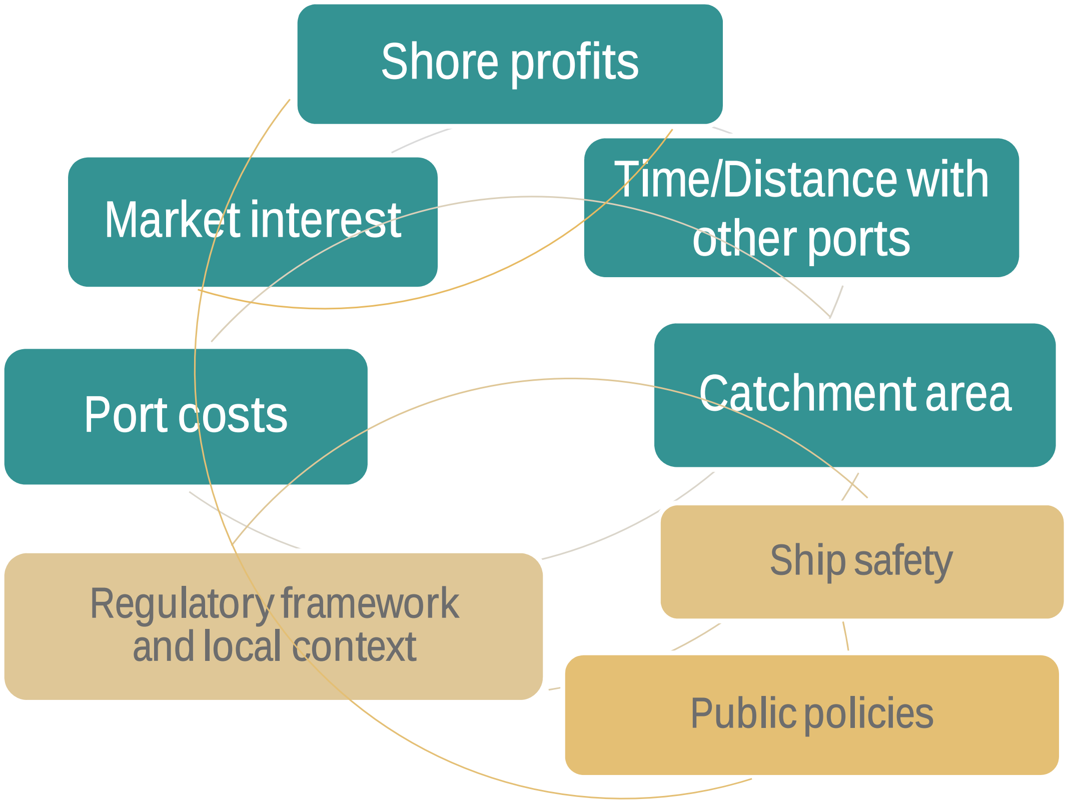
Interport

Take advantage of new solutions for embarkation and disembarkation offered by companies in the itineraries turn around. It may seem like a "middle way" between the above options but assumes characteristics, conditions, constraints and opportunities all its own.

CRUISE ECONOMIC INVOLVMENT FOR TERRITORIES



CRUISE SHIPS DEPLOYMENT: KEY FACTORS IN DECISIONS



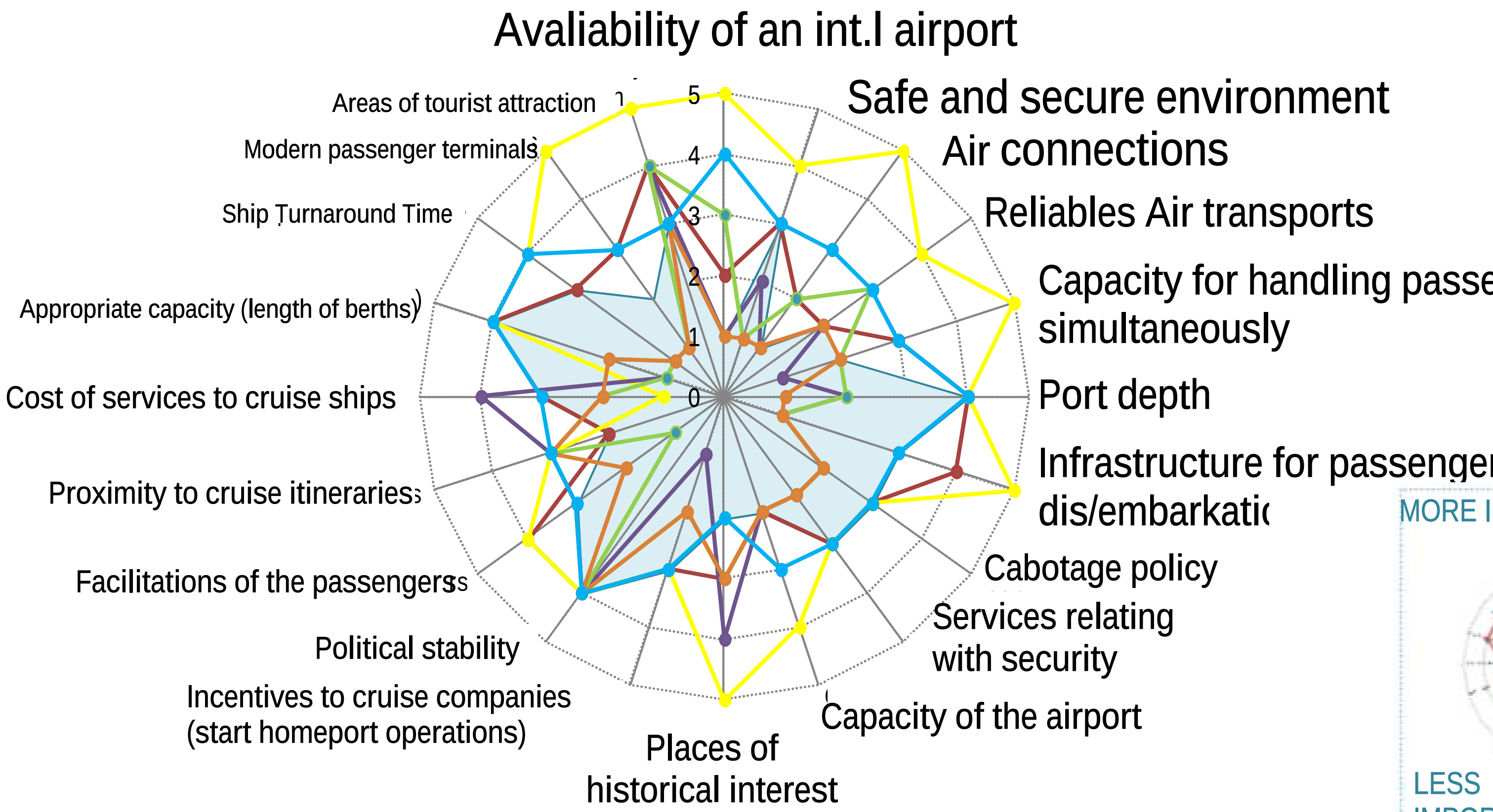
EACH SCENARIO HAS ITS OWN PRIORITIES

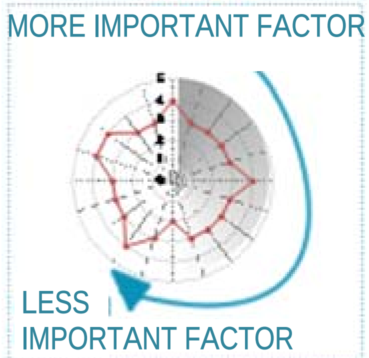
	PoC	HP all	HP only small ships	IntP
Developing a subject /work table for the interest convergence of local stakeholders				
Develop / coordinate joint operations to cruise companies to ensure continuity of relationship				
Acquire "real" competitive advantages				
Encourage commercialization and marketing activities (selling cruises)				
Reduce the accessibility constraints of the destination				
Improving air links				
Review the pricing policy and the overall costs of port				
Building an incentive scheme (in prices and rates) based on the seasonal trend				
Improve the security and safety of the ship (bollards, fenders, display ship)				
Increase the space of quay (wharf extension)				
Increase the space of quay (improving and using more often a second quay)				
Set up / improve a terminal "soft" (<1000pax)				
Set up a terminal "hard" (> 1000pax)				

HOME PORT

A POSSIBLE NORTH ADRIATIC PORTS BENCHMARK (1/2)

FROM A STUDY WHICH RECOGNIZED MORE THAN 60 FACTORS,
WE RANKED FOR EACH PORT THE FIRST 20 FACTORS ASSIGNING 1 TO 5 POINTS

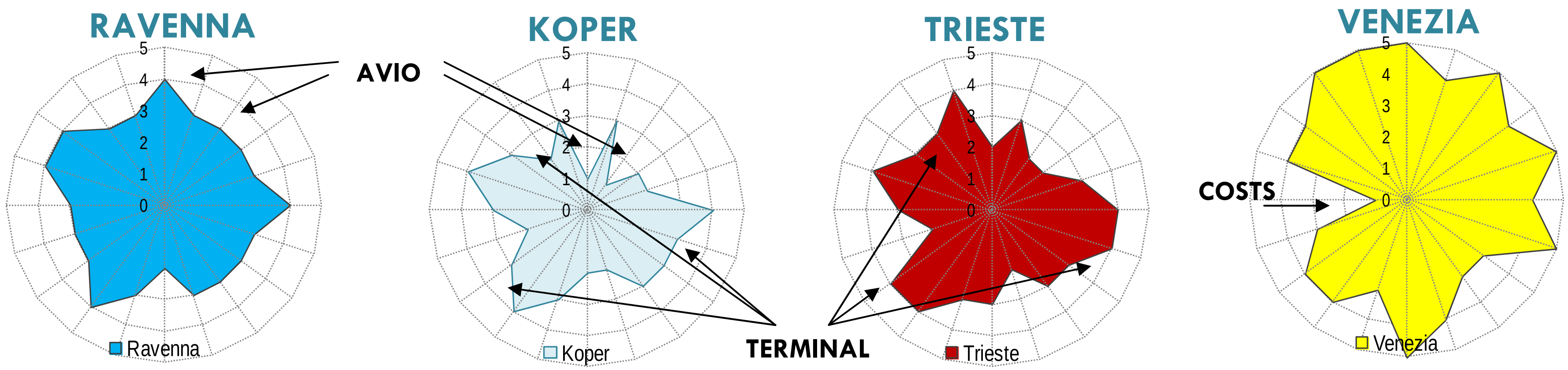




HOME PORT

A POSSIBLE NORTH ADRIATIC PORTS BENCHMARK (2/2)

COMPARING NORTH ADRIATIC CRUISE PORTS AT PRESENT TIME



WHERE ARE THE WEAKNESS ZONES?

EVEN IF INCREASING ONE POINT (I.E. REALIZING A NEW TERMINAL)
THE FILLED AREA WON'T BE REVOLUTIONIZED
AS TO BE COMPETITIVE IT IS NECESSARY TO WORK WITH A WIDE VIEW

WHERE KOPER COULD WORK TO BE MORE COMPETITIVE THAN THE OTHER PORTS?

A PATH OF DEVELOPMENT IN EVOLUTION (1/2)

> DESTINATION INVOLVEMENT

WORK
FRONTS
PRIORITIES

> DIALOGUE WITH OTHER PRIVATE AND PUBLIC STAKEHOLDERS (HYP. CRUISE BUREAU)

> CRUISE LINES OPEN RELATION

> CONTINUE IMPROVING SERVICES WITH TARGETED INVESTMENTS

> DO NOT UNDERESTIMATE PORT AESTHETIC/WELCOME VIEW

> REFLECTING ON FEES, CHARGES, TARIFFS

> CHOSE AND WORK ON SOME COMPETITIVE ADVANTAGES

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A PATH OF DEVELOPMENT IN EVOLUTION (2/2)

AS 2011 WAS EXCEPTIONAL > 2012 AND 2013 ARE A MORE CONCRETE START POINT TO WORK

KOPER TERMINAL IS ABLE TO SUCCESSFULLY MANAGE DIFFERENT CRUISE ACTIVITIES (SOME LIMITS FOR +3.000 PAX SHIPS)

KOPER PORT SHOULD ADAPT TO CRUISE LINES NEEDS AND EXPECTATIONS CREATING LONG TERM RELATIONSHIPS

IT IS NECESSARY TO BALANCE POTENTIALITIES AND FEASIBILITY:

- Continue to work on transits. Affirmation as a reliable port of call;
- Approach an home port scenario creating the condition to start interporting activities;
- Approach the idea of a new terminal with chariness (which demand? Airport lift, Venice role, Trieste new terminal).

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ZA CELOVITO MEDMESTNO POVEZAVO

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