

Country Report Italy

# European shipbuilding in a globalised market

Outsourcing and fragmentation  
in the Italian shipbuilding industry

Francesco Eugenio Iannuzzi,  
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**About the project: Shipping off labour: changing staffing strategies in globalised workplaces (ShipGlobal)**

The EU enlargements in 2004 and 2007 made it easier for Western European shipbuilders to offshore hull production to central and eastern European countries and acquire shipyards in countries such as Poland and Romania, as well as to hire labour and subcontractors from these countries for production at their home sites, often aiming to reduce labour costs. As shipbuilding is deeply impacted by globalisation, the industry gives a good illustration of the dynamics of change in the international division of labour. This project conveys how this dual mobility –eastward transfer of production and investment, and westward movement of labour and services – has impacted the shipbuilding industry's production and staffing strategies in Germany, Italy, Norway, Poland and Romania. Moreover, it analyses how this dual mobility has influenced industrial relations and social dialogue at different levels. The results are based on the available literature, statistics, registry data, qualitative interviews and case studies in these five countries. The participating institutions are the Arena Centre for European Studies, the University of Oslo, the Fafo Institute for Labour and Social Research, the University of Padova, the Scuola Normale Superiore, the University of Duisburg Essen, the European Trade Union Institute, the SGH Warsaw School of Economics and Dublin City University. The project is headed by Ines Wagner, Arena Centre for European Studies, University of Oslo.

Reports from each participating country were prepared as part of the dissemination of the project. You can find them on this website:

<https://www.sv.uio.no/arena/english/research/projects/shipglobal/> and on <https://www.etui.org/Publications/Reports>

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## **Abstract**

This report analyses the shipbuilding industry in Italy. Based on 65 interviews (see List of interviews) with workers, managers and key witnesses collected from 2020 to 2024, we highlight how the transformation of shipbuilding in Italy has been based on: (i) increasing internationalisation of production; (ii) strong outsourcing of operations within Italian yards; (iii) substantial change in the composition of the workforce, with the employment of migrant workers; and (iv) a weakening of trade unions. This report is structured as follows. First, an overview of Italian shipbuilding is provided, mentioning both Fincantieri and the other private enterprises operating in the sector. Focusing mainly on Fincantieri as the leading company in the industry, the report then provides a historical overview of the transformations in production that have occurred since the crisis of the 1970s and globalisation. This study then analyses the most recent transformations with regard to financialisation, functioning of subcontracting chains and composition of the working class. Some insights from the Marghera and Monfalcone case studies are reported, before a brief discussion of the survey results.

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# 1. Introduction – snapshot of the national context

Italy has a longstanding and consolidated tradition in the shipbuilding sector. Indeed, it is a leading producer of cruise ships in Europe and worldwide. In fact, Italy was responsible for building 36 per cent of the world's cruise ships in 2022 (OECD 2024). In 2020, the value added of the sectoral supply chain was more than 7 billion euros (€) (Unioncamere 2022). In the same year, the total number of employees in the industry was more than 123,000 (ibid.). Data from 2013 to 2020 show that the sector was on an upward trend as a driver of the national economy. Indeed, the impact of shipbuilding on Italian GDP was 0.26 per cent in 2013 and 0.54 per cent in 2020.

The industry can be divided into three main branches (Inapp 2021): the construction of larger ships and floating structures; the construction of pleasure and sports boats; and ship repair and maintenance. The first branch employs two-thirds of the sector's employees and is responsible for 60 per cent of exports. The other two branches involve a myriad small and medium-sized enterprises. In the sport and pleasure boating industry, 81 per cent of firms employ fewer than 10 employees and only 4 per cent have more than 50 employees. Nevertheless, the boating industry was able to export in the amount of €4 billion in 2023, according to a report by Confindustria Nautica (2024), an employers' federation. Even super-yacht producers have managed some important achievements in recent years, receiving 600 orders – well above competing countries such as Turkey and the Netherlands.

Shipbuilding production is distributed all along the coast, but there are larger districts with significant production volumes. The regions with the highest production capacities are Liguria, Friuli Venezia Giulia and Tuscany. The sector is widely dominated by Fincantieri, a multinational company controlled by the state through *Cassa Depositi e Prestiti*, on which this report will focus. It is important to mention some important production realities among private shipyards, however:

- **Cantieri Navali Visentini.** This shipyard is located in Porto Viro, a small municipality in the province of Rovigo (North-East of Italy). The plant specialises in the production of ferries and passenger ships. The last ferry launched was a dual-fuel (traditional and LNG) ship, 216 metres long (Shipping Italy 2024). The shipyard employs about 50 workers directly. The rest are employees from subcontracting firms, in varying numbers depending on the progress of production. Completions by selected ship types (in thousands of Cgt), 2013–2022 (OECD 2024): ferries, 156; Ro-Ro, 54.

- **Mariotti Shipyard.** Located in the industrial area of the Port of Genoa (North-West Italy), the yard specialises in the production of mega-yachts, ultra-luxury and cruise ships. In the course of diversification, the shipyard entered the offshore segment (patrol boats). The workforce is 100 people, plus external workers (up to 1,000 during peak production). Completions by selected ship types (thousands of Cgt), 2013–2022 (OECD 2024): cruise ships, 42; ferries, 9; offshore, 3.
- **Cantiere Navale Vittoria.** This shipyard has been going through a significant downturn lately, with uncertainty about the future. It is located in Adria, in the province of Rovigo (North-East of Italy). It specialises in the production of naval units dedicated to patrolling, including those destined for the Libyan coastguard as part of a broader border control outsourcing programme. This type of production has been contested by immigrant rights activists (Melting Pot 2023). The shipyard employs 50 direct employees, plus external workers from subcontracting firms. Completions by selected ship types (thousands of Cgt), 2013–2022 (OECD 2024): dredgers, 6; ferries, 4; offshore, 2; other non-cargo, 4.
- **Azimut Benetti.** Azimut manages a number of shipyards in Italy: Avigliana, Livorno, Savona, Viareggio, Fano (Centre and North of Italy). Azimut specialises in the production of ultra-luxury and super-yachts.
- **The Italian Sea Group.** Production specialisation: super-yachts and mega yachts (up to and over 100 metres in length). The group is located in the ports of Marina di Carrara, Viareggio and La Spezia (Centre and North of Italy).

Shifting the focus to Fincantieri, its production portfolio encompasses cruise ships, transport vessels, warships for state navies (Qatar, Indonesia and so on), and marine repair services. Between 2013 and 2022, it represented 91.7 per cent of ship production (in CGT) in Italy (OECD 2024): cruise ships, 4307; ferries, 19; offshore, 16; other non-cargo, 16. In Italy Fincantieri operates eight shipyards, whose locations span several regions: Liguria in the northwest; Friuli Venezia Giulia and Veneto in the northeast; Marche in central Italy (Adriatic coast); Campania and Sicily in Southern Italy. The influence of Fincantieri’s production on local GDP is significant in many cases, with regard to both the largest plant (Monfalcone is a relatively small company town) and in the cases of the Southern shipyards, which are considerable employment basins in the context of high unemployment rates. This set of factors makes Fincantieri a strongly indicative case for analysing the dynamics of the entire shipbuilding sector.

Table 1 provides a snapshot of the productive specialisation of the eight Fincantieri’s shipyards. Variations in productive specialisation are driven by yard-specific characteristics (for example, the breadth of docks and the space available). Some shipyards are exclusively dedicated to the production of military ships (Riva Trigoso and Muggiano). Monfalcone and Marghera plants are involved in the production of the largest cruise ships, while Ancona and Sestri Ponente (Genoa) build medium-sized ones. Palermo has a mixed specialisation, particularly in ship repair but lately also in military ships as a result of dock enlargement. Castellammare deals with the production of ship sections, while more rarely the shipyard produces LNG ferries for Grimaldi (usually made in South Korea



due to more competitive costs). At the shipyard of Castellammare, a number of military ships are also laid down. These ships are then towed and completed in the Ligurian shipyards engaged in this kind of production. Finally, it should be noted that inside the plant at Riva Trigoso there is also a manufacturing department dedicated to the production of turbines, manoeuvring propellers and stabiliser fins. This department produces for Fincantieri but also for other foreign shipyards.

Table 1 Fincantieri's shipyards and production specialisation

Shipyard	Production specialisation
Monfalcone	Cruise ships
Marghera	Cruise ships
Genoa	Cruise ships
Riva Trigoso	Military ships; manufacturing department (turbines, stabiliser fins, manoeuvring propellers etc.)
Muggiano	Military ships
Ancona	Cruise ships
Palermo	Ship repairs; military ships
Castellammare	Ship sections; LNG ferries; military ships (not entire)
Trieste	Headquarters; Operating Unit

Source: authors' compilation based on union and expert interviews.

## 1.1 State policies and support schemes for shipbuilding / Green transition

The European Commission approved a €500 million Italian scheme under the aegis of Next Generation EU within the framework of the Italian National Recovery and Resilience Plan ('Fleet Renewal – Sustainable Ships') to help shipowners to renew their naval fleet in a more environmentally friendly direction (European Commission 2022). This scheme was part of a policy package to meet the targets set by the European Green Deal and 'Fit for 55' programme. This state aid is in the form of direct grants. In particular, they concern the acquisition of low-emission vessels or the use of green technologies to reduce the environmental impact.

Moreover, under the Italian NRRP, there is a specific mission linked to the progressive decarbonisation of ports (Unioncamere 2022). The established goal is to reduce port systems' energy consumption, including through the use of renewable energy.

According to a Fincantieri manager in an interview, these processes can be implemented 'through heavy investments that we benefit from. We have the expertise to equip ships with batteries so that in approaching ports they can operate with zero emissions. (...) Another source of pollution is the ships that stop at ports. The challenge is the electrification of the docks, through a plug that connects to the port to power energy sources inside a ship' (Fincantieri Manager, Monfalcone).

## 2. Historical background

Amidst the broader context of the European shipbuilding industry (Cho and Porter 1986), Fincantieri entered a deep crisis from the 1970s. The crisis was the result of several factors. First, there were the effects of the 1973 oil crisis, which had significant repercussions for global demand (Giulianelli 2014). The emergence of competitors – such as the South Korean shipyards – that benefited from lower costs was crucial. Persisting throughout the 1980s, the crisis had a significant impact on employment levels, resulting in the loss of approximately one-third of the direct workforce. For part of the 1980s, the crisis was managed by extensive use of redundancy funds. The Italian government also tried to revive military orders, trusting in the partially anti-cyclical role of such investments. However, it was only in the 1990s that the recessionary phase was overcome. In a strategic move in 1984, Fincantieri undertook a comprehensive reorganisation of its production structure, dividing it into four distinct branches: military ships, merchant ships, repairs, and engines (Zanin 2002: 42).

The recovery began in the 1990s when Fincantieri entered the production niche of cruise ships, initially built in Monfalcone and Marghera. At a later stage, even the shipyards of Genoa and Ancona became involved in this. The 1990s proved to be important for Fincantieri, as it struggled to latch onto the economy recovery and the company underwent continuous restructuring, leading to a significant reduction in the direct workforce. In particular, repair activities were scaled back (Zanin 2002). Alongside the use of redundancy funds, Fincantieri resorted to early retirement and froze hiring. In 1981, Fincantieri employed more than 30,000 workers, but this had fallen to just over 20,000 by 1991 and dwindled further to 10,000 in the late 1990s (Zanin 2002: 43). However, Fincantieri did not choose the option of shuttering entire shipyards, a strategy adopted in other European countries. Rather shipyards – distributed throughout the country – were kept in business with an overall staff reduction. This approach aimed to preserve the national character of Italian shipbuilding, particularly in regions of the South where unemployment was especially challenging. From this point of view, business interests were able to meet political interests halfway, thanks to the mobilisation of both trade unions and representatives of the local governments where shipyards were located (FIOM CGIL 2007). This negotiated restructuring marked a significant achievement for the unions, but it came at the cost of diminished bargaining power over work organisation, as noted by a former officer of Fincantieri (Interview, Monfalcone).

A decisive increase in orders for cruise ships fuelled the recovery in the 1990s. During the late 1980s and the early 1990s, the first cruise ships were constructed

in Monfalcone and Marghera. By the end of 1995, over 80 per cent of global orders for passenger ships were awarded to European shipyards, with Fincantieri carving out a leading role in the industry along with Kvaerner Gruppe (Finland and Norway). By the late 1990s, approximately 75 per cent of Fincantieri's turnover stemmed from cruise ship construction. At the beginning, this kind of productive specialisation heralded a significant shift for the shipyards, as it fundamentally altered the organisational and production model, fostering an even more pronounced use of outsourcing and subcontracting. Outsourcing affected increasingly large portions of the production cycle. This expansion, particularly evident in the largest shipyards, such as Monfalcone and Marghera, aimed to move beyond single-ship operations to the building of multiple ships at the same time, thereby streamlining labour costs and reducing delivery times. At the Marghera shipyard, the number of outsourced workers surged from 1,500 in 1996 to 5,000 in 1997 (Merotto et al. 2002: 113). While subcontracting was not totally new in the shipbuilding sector, in the 1960s and 1970s trade unions struggled to curb the extension of outsourcing and to equalise labour rights for direct and indirect workers (Cernigoi et al. 2010; Parenzan 1983). These demands led to an increasing rigidity in the exploitation of labour by the shipbuilding companies. Outsourcing gained new momentum in the 1990s, also favoured by the early retirement of numerous direct employees as a result of legal concessions for people exposed to asbestos (Interview with the former officer, Monfalcone). This generated a shortage of skilled labour and strengthened Fincantieri's orientation towards contracting and subcontracting. Initially, outsourcing affected specific production phases, while crucial parts of production, such as hull processing, remained the province of direct employees. This changed with the surge in cruise ship orders, heightening production demand. Thus, Fincantieri opted to ramp up its outsourcing. The number of third-party companies involved in production experienced exponential growth, particularly in Marghera and Monfalcone (Sacchetto 2002: 101), but more broadly in all shipyards. These profound transformations, driven by market and cost-containment purposes, paved the way for the erosion of union bargaining power (Interview/ former trade unionist, Monfalcone) and the proliferation of varied wage standards and regimes. This contributed to the rolling back of such egalitarian achievements as the extension of the economic and regulatory standards (metalworking sector collective agreement) of direct employees to indirect ones.

### **3. Setting the scene: transformation of (national) shipbuilding in the 2000s**

#### **3.1 Changes in markets and production strategies since the early 2000s – impact of the financial crisis**

##### 3.1.1 The consolidation of outsourcing

Between 2000 and 2020, outsourcing underwent refinement and consolidation, marked by the decentralisation of increasingly larger production components. Presently, almost the entire production process was outsourced, including the hull processing that had always been the traditional domain of direct employees. Simultaneously, Fincantieri has pursued a strategy to enhance its oversight over subcontracting firms. As explained by a trade unionist in Marghera: ‘Nowadays, contracted workers are akin to Fincantieri employees. From the moment they step in until they leave, Fincantieri monitors their activities, the duration of their tasks. Fincantieri is fully aware’ [Interview with a trade unionist, Marghera].

The organisation of production developed by Fincantieri since the 2000s has enabled the company to persist in reducing labour costs, outsourcing work to third-party companies, and not hiring new direct personnel for most blue-collar activities. This management approach has been facilitated by the reinforcement of the supervisory role of production managers. Over the past two decades, Fincantieri hiring has focused on recruiting clerical and technical staff to serve as production managers. In Marghera, the workforce has decreased from 1,400 to 1,000 employees, with over 500 employees now directly overseeing external firms. According to trade unionists from different organisations (Interviews, Marghera), the ratio of white-collar workers to blue-collar ones stands at 60/40. In Monfalcone, there are 1,600/1,700 direct workers, with a one-to-one ratio of white-collar to blue-collar workers. Supervisory roles began to become increasingly important starting in the 1990s, when many blue-collar workers were promoted. This upgrading has provided career opportunities for many blue-collar workers, a fact that the company exploited for anti-union purposes. Fincantieri was able to leverage career progression in return for the abandonment of more radical union demands.

During the 2008–2009 crisis, Fincantieri resorted to redundancy funds, while some direct workers opted for early retirement. The crisis, which lasted through the early years of the following decade, revealed the financial fragility of many

external companies, which underwent major difficulties because of their exclusive dependence on the shipyards' subcontracting. Many went bankrupt, while others would be replaced by new firms capable of offering lower costs. Following the crisis, the subcontracting system was bolstered, and other direct workers were transitioned into supervisory roles. Nowadays, the production supervisor is a more clearly defined figure than in the 1990s, playing a more active role at the construction site with the specific task of ensuring that subcontractors adhere to the schedules (Interview with a trade union official, Marghera). Despite some attempts at union resistance, this transformation proceeded unabated. Career trajectories have won acceptance among direct workers (Burawoy and Wright 1990), favouring the company's strategies. As a union official in Marghera put it: 'there was a lack of resolve to firmly advocate for this stance. Even seasoned workers viewed this shift as an opportunity for better prospects from Fincantieri' (Interview, trade unionist, Marghera).

Another strategy adopted by Fincantieri since the 2000s has involved erosion of the autonomy of third-party companies, relegating them to mere suppliers of labour for the assembly stages. In the 1990s, a part of furnishing was outsourced to companies responsible for material procurement. Nowadays, Fincantieri procures materials on its own, supplying them to subcontractors for assembling. Moreover, Fincantieri has acquired several companies, such as Marine Interiors (sites in Ronchi dei Legionari and Pordenone), tasked with producing prefabricated components essential for cabin construction.<sup>1</sup> Once completed, these components are shipped to Monfalcone and Marghera, where third-party companies assemble them. A similar approach has been adopted for ventilation ducts, which were previously sourced and assembled by contracting companies. Now Fincantieri procures prefabricated parts and delivers them to contractors for assembling. As noted by a trade unionist in Marghera: 'Today, certain tasks are performed in factories owned or controlled by Fincantieri. Some operations are conducted externally, and parts are brought to the yards' (Interview, trade unionist, Marghera).

This approach has significantly curtailed the autonomy of contracting companies, eroding their economic margins. These companies retain the role of labour supplier, notwithstanding an outsourcing system that does not encourage growth in the size of external firms. As mere labour suppliers, these external companies are responsible solely for assembling prefabricated parts on-site. As explained by unionised workers at the Marghera shipyards: 'Where Fincantieri can exert direct control and cut costs, it does so. It dictates that it will supply the parts and that the subcontractors have to assemble them. Consequently, the profit margins of external companies have shrunk considerably' (Interviews carried out in Marghera with unionised workers). Satisfying this desire to transform contracting companies into assembly-focused entities needs increasingly larger spaces within the yards. In Marghera, Fincantieri shuttered the last workshop under its management (the sheet metal park), outsourcing these tasks to San Giorgio in Nogaro. A similar

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1. In this case, Fincantieri intervened by taking over a supplier that had entered a period of economic difficulties. This choice was motivated by managing the furniture production segment more directly, which is significant in terms of added value.

transition occurred in Monfalcone (Interview with a union official, Monfalcone). This has partially changed the spatial configuration of the shipyards, as was also noted during a guided tour of the Monfalcone site.

Over the past two decades, Fincantieri has evolved from an industrial entity into a commercial enterprise that outsources 90 per cent of production. As summarised by a trade unionist: ‘In reality, the actual construction work is performed by third-party companies, supervised by Fincantieri’s employees’ (Interview with a trade unionist, Marghera). According to different estimates, 80 to 90 per cent of the value of a ship is realised by external companies (first estimate provided by a Fincantieri manager during an interview carried out in Monfalcone; second estimate provided by a document that FIOM of Marghera filed to public prosecutor's office as part of a legal dispute over irregularities in some contracting companies). In Monfalcone, outsourcing also extended to the welding department (the so-called Salderia B), which had always been the exclusive preserve of direct workers. Even hull processing is now outsourced. This transformation happened despite union efforts in the late 1990s to negotiate an agreement to retain at least 75 per cent of hull construction within the purview of direct workers. Union demands were aimed at preserving better contractual and working conditions but also the skills and expertise of the shipyards’ direct workforce. However, due to retirement, lack of turnover and transition of some workers into supervisory roles, this expertise was neither preserved nor developed.

One noteworthy aspect highlighted by some interviewees is that to secure a high volume of orders, Fincantieri accepts ship orders with minimal profit margins (Interview with a trade unionist, Marghera). Romanian shipyards (now controlled by Fincantieri through the subsidiary Vard) are thus involved in the production of some hull sections, then towed and shipped to Monfalcone and Marghera. This is done by exploiting the significant wage differential between the two countries. Similarly, Fincantieri is now utilising some Croatian shipyards (such as Brodosplit) for hull sections. Additionally, over the past two decades Romanian shipyards have also been entrusted with engine assembly. As noted by a trade unionist in Marghera: ‘When a ship arrives in Marghera, it is almost complete. All that is left is the interior furnishing and other component assembly in the Venetian shipyard’ (Interview with a trade unionist, Marghera).

The use of subcontracting increases further in the period immediately preceding a ship launch. The urgency of meeting strict delivery deadlines needs a substantial workforce, notably in tasks such as cleaning, which often involves temporary female workers. This trend is observed across all shipyards, including Monfalcone and Marghera. There is then a fluctuation in the number of working hours and workers required from month to month. In April 2022, there were 4,020 subcontracted workers in Marghera (employed by 512 third-party companies); by May 2022, the count had risen to 4,798 (distributed among 527 external companies; in June, the figure decreased again to 4,192 (employed by 539 firms), while in July, the number increased to 4,581, before dropping to only 1,857 in August, because of the summer vacation. These figures, taken from a study commissioned by FIOM of Marghera (Gaddi 2022), are summarised in Table 2. Table 3 provides insights into direct and indirect employment in all Fincantieri’s shipyards.

Table 2 Indirect workforce and third-party companies at the Marghera shipyard

Period	Indirect workforce	Third-party companies
April 2022	4020	512
May 2022	4978	527
June 2022	4192	539
July 2022	4581	553
August 2022	1857	468

Source: Gaddi (2022).

Table 3 Direct and indirect workforce at the Fincantieri shipyards

Shipyard	Direct workforce	Indirect workforce
Monfalcone	ca. 1600	5500 (peak: 8400)
Marghera	ca. 1000	4000–4800
Ancona	ca. 650	2850–3350 (peak: 4000)
Genoa	805	2700
Muggiano	ca. 700	3000+
Riva Trigoso	807	900/1000 (peaks: 1200/1500)
Palermo	ca. 480	1000–2000
Castellammare di Stabia	ca. 590	600 (ship sections) 1400 (military ships) 1900–2400 (super-luxury ferries)

Source: Gaddi (2022) and interviews with shipyards' shop stewards.

Table 3 highlights the importance of the external workforce. The number of external companies is substantial. As in Marghera, hundreds of contracting companies also operate in Monfalcone. This results in a complex, segmented and fragmented variety of firms, which individually often employ few employees. To provide a basic analytical framework (Quondamatteo 2022), we can classify these companies according to certain dimensions: (i) market position within the value chain; (ii) size; (iii) the prevailing national composition of the workforce; and (iv) the sectoral collective agreement applied to the workers. These dimensions can intersect with each other.

Regarding market position within the value chain, it is important first to distinguish between a few hyper-specialised firms (for example, those involved in the production of theatres) and firms operating in lower value-added segments. In the former case, companies engage in specialised niche activities, which tend to be unrepresentative of the general working conditions within the shipyard. Conversely, firms involved in segments characterised by more labour-intensive processing and hazardous work (such as grinding) operate in lower value-added segments. These firms often represent the second tier of the subcontracting system and are often in competition with other subcontractors, resulting in a race to the bottom. The differences between the first-tier contracting firms and second-tier subcontracting ones are important. Fincantieri contracts out the least profitable tasks. In turn, first-tier contractors operate in the same way: 'it is a pyramid scheme', noted a shipbuilding expert during an interview (Interview conducted in Monfalcone). Also noteworthy are temporary or permanent consortia of third-party companies,

although these consortia are not uniformly present in all Fincantieri's shipyards (Interviews with trade union officials and shop stewards from different shipyards and with a FIOM national coordinator for the shipbuilding industry). Essentially, groups of companies collaborate to secure contracts from Fincantieri. However, this collaboration does not seem to have promoted stable and more structured industrial conditions that could serve as a precondition for improving collective bargaining and labour conditions (Interview with a shop steward, Monfalcone). As explained by a tax consultant for some external firms, consortia often continue to harbour unequal relationships between member companies, very similar to the traditional relationships between contractors and subcontractors (Interview realised in Monfalcone).

Regarding the different sizes of third-party enterprises, it is possible to distinguish between a core group of more structured external companies and numerous smaller companies. In the latter, violations of labour standards are more entrenched. Many small businesses have registered their legal offices in flats and do not comply with the minimum requirements for share capital and number of employees established by the collective bargaining in 1999.<sup>2</sup> Smaller firms often have a short life span and not infrequently avoid paying their final month's salaries and severance pay to their workers. Concerning the prevailing national composition of the workforce, this dimension significantly influences the characteristics of subcontractors. Differences between workers with various immigration statuses are crucial for understanding companies' strategies (recruitment, compliance with labour standards, etc.). The presence of foreign subcontractors is significant. No exact data are available for Fincantieri's outsourcing, but across the national shipbuilding industry there are more than 2,000 firms with foreign-born owners (Unioncamere 2023). In Fincantieri's shipyards, it is important to mention the growing number of firms led by subcontractors of Bangladeshi origin. These firms employ compatriots, enabling individuals with limited or no knowledge of the Italian language to enter the labour market. These employers are almost always second-tier contractors, as noted by one of them during an interview (Interview with a subcontractor of Bangladeshi origin, Monfalcone).

Regarding sectoral collective agreements, there is a high degree of fragmentation within the shipyards. A variety of collective agreements are utilised, spanning the metal sector, metal craft industry, service sector, wood sector, chemical industry, and so on. The use of different collective agreements is often motivated by the convenience of external companies seeking the most favourable wage regimes to maintain margins within the hyper-flexible outsourcing system implemented by Fincantieri.

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2. This provision was intended to establish a more qualified network of contractors to avoid the proliferation of small companies and second-tier contractors at the lowest cost within the subcontracting chain. However, this provision has not been implemented in practice over the years.



### 3.1.2 Financial crisis, financialisation and economic recovery

The effects of the financial crisis were prolonged until 2014, which was a new turning point for Fincantieri. The company managed to catch up with the recovery of the sector's economic cycle, driven by a new boom in orders for cruise ships. Immediately after the economic crisis, Fincantieri had attempted to radically change its industrial relations. The goal was to exit from Confindustria, the main employer federation in Italy. Such a path had been taken by FCA, the most important car company in Italy, by dividing the trade unions and replacing the national sectoral collective agreement of the metal industry with a firm-level agreement. Unlike FCA, however, Fincantieri's attempt was not successful, and the company remained associated with Confindustria and its branch (Federmeccanica). Fincantieri management has also held important positions within these federations, both at national and territorial levels.

While this radical change in industrial relations for direct workers has not occurred, other transformations have been achieved. In 2014, Fincantieri was financialised through its entry onto the stock exchange. The majority shareholder remains the state through Cassa Depositi and Prestiti. The state plays an important role in periodically appointing the top officers when their terms expire. Anyway, financialisation represented the final step in the marketisation of the company. The state has little influence over industrial policy and work organisation. Financialisation had failed in the past because the opposition of the trade union movement (particularly FIOM) and left-wing political parties who had opposed attempts in this direction by their government partners (Interview with a former officer of Fincantieri, Monfalcone).<sup>3</sup> There have been two major consequences of this financialisation process. On one hand, Fincantieri has recapitalised, not being able to rely on state aid due to EU regulations. This allowed Fincantieri to cover the costs of an acquisition strategy (Vard, controlled by 2013). On the other hand, financialisation has further increased the pressure on the subcontracting chain. This has resulted in the consolidation of the market-led management of third-party companies by Fincantieri, as noted by a shop steward at the Monfalcone shipyard (Interview carried out in Monfalcone).

### 3.1.3 Navigating pandemic time

Although the Covid-19 crisis significantly affected various sectors connected to shipbuilding (such as cruise tourism), Fincantieri experienced a limited reduction in turnover. According to data from the Association of Italian Shipbuilders (Assonave 2021), the first half of 2020 saw a 40 per cent drop in orders for new ships and a 17 per cent drop in deliveries worldwide. European shipbuilding has paid a high price: orders in Europe have fallen by 62 per cent and deliveries by 48 per cent. Against this backdrop, Fincantieri's 2020 annual budget highlighted a 16 per cent fall in revenues (€3.5 billion in 2020) compared with 2019 and a

3. The lack of agreement within the centre-left government (2006-2008) prevented the financialisation of Fincantieri.

34 per cent drop in profitability (Fincantieri 2021a). In 2020, costs increased by €149 million, exclusively due to the need to manage the effects of the crisis and safety measures for workers within the shipyards. According to Fincantieri, these problems were linked to the immediate contingency and production stoppage that occurred in March and April 2020, the most acute phase of the virus' spread. This stoppage included the slowdown of production activities and a few logistical bottlenecks. Activities were gradually resumed from the end of April 2020. Telework measures were implemented for remotely operable activities, involving 45 per cent of the workforce. After rescheduling, Fincantieri delivered 19 ships in 2020, including seven cruise ships (Fincantieri 2021a).

Fincantieri did not record any cancellations of orders in progress. Even during the pandemic, Fincantieri recorded orders with a value of €36.8 billion for the construction of 116 ships (military, civil, offshore and special) by 2029 (Fincantieri 2021b). Nevertheless, there was some difference in the saturation of the production cycle at the various shipyards. Moreover, according to privileged witnesses, the non-cancellation of current orders in the cruise sector is due to the competitive and production strategies of the large international operators (Interviews carried out in Marghera). The construction of cruise ships requires long lead times between design and implementation. Additionally, in 2020–2021 cruise ship owners started to dismantle older ships, usually smaller, more expensive and more polluting.

The consequences of the pandemic do not seem to have varied significantly according to the specialisation/differentiation of yards. According to some respondents, there were contingent changes in labour mobility during the pandemic period (2020) due to the measures implemented by national governments to cope with the health emergency. The first of these changes was the interruption of migration flows for a few months, particularly from Bangladesh. Italy closed direct flights from and to Bangladesh for a few months in 2020 and 2021. However, this interruption was not perceived as significant. It did not lead to a labour shortage in Fincantieri's subcontracting chain where Bangladeshi workers are mostly employed (Interview, Marghera). The second change was related to the ability of some subcontractors to expand recruitment strategies to encompass migrant workers previously employed in other sectors particularly affected by the pandemic (tourism, catering). At the Marghera shipyard, trade unionists reported the presence of some migrant workers previously hired in the tourism district of Venice. These workers had lost their jobs and found new employment opportunities within Fincantieri's subcontracting chain. In some cases, these workers had already worked at the shipyard in the past before moving to these other sectors (Interview with trade unionists, Marghera). Something similar happened to Monfalcone, where several Bangladeshi workers went from different cities (Milan, Rome) looking for job contracts. Monfalcone shipyard has thus become a pole of attraction, also because of the relative ease of entering the local labour market (often with short contracts). Despite the hard working conditions within the shipyards' subcontracting chain (precariousness, widespread violation of labour rights, overtime), these jobs may seem like a viable alternative for some migrants compared with other positions, including those in the informal economy.

Another change in labour mobility concerns the measures taken by Fincantieri to manage the international mobility of personnel. In January 2020, some employees working in China within the framework of a partnership with Carnival and the Chinese state-owned shipbuilding company were repatriated (Fincantieri 2021b). On the other hand, the mobility of labour between Romanian and Italian shipyards was drastically limited, as emerged in an interview [Trade unionist, Marghera].

Cyclically, the issue of workplace contagions arose. Significant outbreaks occurred in autumn 2020 within the Marghera shipyard, with over 140 outsourced workers in quarantine due to contacts with infected people (Favarato 2020). Outbreaks also occurred in Palermo, Monfalcone and Ancona. In all cases, subcontracted workers were more exposed (also for reasons pertaining to social reproduction, such as living in overcrowded apartments). In the quoted case of Marghera, the outbreak involved many Bangladeshi workers. According to a trade unionist, the spread of the virus has increased racist attitudes towards this national community: ‘the local press, which has a xenophobic stance, has conducted an aggressive campaign by targeting Bangladeshi workers, accused of being a vehicle of contagion due to their cultural habits’ (Interview with a trade unionist, Marghera). Moreover, in the case of Ancona, the increase in contagions prompted trade unions and workers to call for an eight-hour strike, enlarged to include subcontracted workers, to demand more effective containment and screening measures within the workplace (Curzi 2020).

When the pandemic broke out, Fincantieri reacted by implementing some individual measures to prevent the spread of the virus among workers, such as lengthening shifts, staggering the number of entrances and extending lunch breaks. According to Fincantieri’s initial will, these measures could help to preventing a complete halt in the production flow. Anyway, in the first two weeks of March 2020, numerous workers’ strikes within the shipyards prompted Fincantieri to stop operations. The initial forecast was for a 14-day stop. At that point, Fincantieri decided to compel workers to take their holidays, usually held in August (Patucchi 2020a; Caretto 2020). Thus, Fincantieri planned to avoid resort to extraordinary redundancy funds made available by the government. According to some informants, the forced anticipation of holidays would have allowed the company to compensate for the production stoppage, thus managing the scheduling of orders. Workers and trade unions strongly contested the company’s unilateral initiative, however, prompting Fincantieri to review its position and sign a new agreement. The deal provided for the use of Covid-related redundancy funds, avoiding the anticipation of holidays. Production activities gradually resumed from 21 April 2020.

Regarding the impact of the Covid-19 crisis on external workers employed by third-party firms, the situations has been more complex. According to data published by trade unions (Patucchi 2020b), in April 2020 only 120 external companies applied for redundancy funds. Many companies did not apply at all or applied only later. The different degrees of responsiveness reflected the difficulties unions experienced in representing the entire workforce. Some firms did not apply for redundancy funds to avoid incurring potential checks and labour enforcement. The situation subsequently improved, but it is an indicator of the extreme precariousness of the subcontracting chain.

### 3.1.4 Geopolitical crisis

After the start of the invasion of Ukraine, a qualified respondent explained: ‘probably the military naval-mechanical sector will trend upwards after the crisis in Ukraine compared with the civil sector’ (Interview with a shipbuilding expert, Monfalcone). At the beginning of June 2024, a meeting between company and trade unions held in the shipyard of Riva Trigoso testified to the validity of the prediction (Gambardella 2024). Fincantieri presented its renewed commitment to the production of military vessels. Important contracts were signed with the US Navy. Fincantieri is continuing to cultivate productive relationships with the navies of Qatar, Egypt, United Arab Emirates and Indonesia. The Italian company can offer these actors the expertise needed to realise technologically advanced products, such as corvettes, frigates and submarine patrol vessels. Among its goals for the future, Fincantieri aims to carve out a role in greater European defence integration and new military spending programmes against the backdrop of a geopolitical crisis.

## 3.2 Changes in staffing strategies and workforce composition

According to the company’s annual budget (Fincantieri 2021a), Fincantieri employs around 21,000 direct workers worldwide. Most of them (almost 10,000) are employed in Italy, in shipyards, offices and headquarters in Trieste and Genoa. Additionally, Fincantieri employs 5,600 direct workers in Romania (26.7 per cent), 2,400 in the United States (11.4 per cent) and 1,300 in Norway (6.2 per cent). Out of these 21,000 direct workers, almost 17,000 are men, while women represent only a small part of the workforce. Most of Fincantieri’s global direct personnel are between 30 and 50 years of age. Almost 6,000 workers are over 50 years of age, while 2,800 are below 40 (Fincantieri 2021b). Some 94 per cent of the direct workforce has a permanent contract, and 99 per cent work full time.

Concerning professional qualifications, the direct workforce’s composition is as follows: 51 per cent are blue-collar workers, 41 per cent are white-collar, 6 per cent are executives, and 2 per cent are managers (Fincantieri 2021b). White-collar workers include office staff and technical production staff. As already mentioned, the latter are involved in the control, supervision and coordination of production activities carried out by external companies. These workers act as a liaison between the general contractor (Fincantieri) and the several contracting and subcontracting firms (Interviews with qualified respondents carried out in Marghera). They are often former blue-collar workers, promoted to the new role after a training period.

The expansion of the subcontracting chain took place in the face of a reduction in direct staffing and a qualitative transformation of the latter (into supervisory roles). Cost differentials between the direct and indirect workforce are significant, as Fincantieri’s budget reports testify. In 2021, the overall cost of the direct workforce was €580 million (€525 million in 2020, €527 million in 2019), while the value of contracts was €640 million (€947 million in 2020, €746 million in 2019). This

is extremely low if one considers the large size of the external workforce (Gaddi 2022; Table 3). More specifically, the per capita cost of Fincantieri's employees – including blue- and white-collar workers – is €55,551, more than €20,000 higher than the per capita labour cost in contracting firms (Gaddi 2022).

There is no detailed information on self-employment. According to some informants, self-employment concerns only a few highly specialised jobs, often consultants in shipyards and offices where project and plans are developed.

### 3.2.1 The role of temporary work agencies

Temporary work agencies have a very limited role in the direct work of Fincantieri. However, when it comes to the value chain as a whole, there seems to have been an increase in their use by some first-tier contractors. This increase occurred particularly during the period of suspension of the 'Decreto Dignità' (Dignity Act),<sup>4</sup> a 2018 law limiting the possibility of using agency work (Interview with a trade unionist, Marghera). More recently, temporary work agencies have been used by some painting firms. These first-tier contractors utilise temporary work agencies as a possible alternative to subcontracting. Trade unions themselves have pushed for first-tier contractors to use temporary agencies, hoping for greater compliance with labour laws compared with the subcontracting firms. This commitment has been enshrined in company-level collective agreements between Fincantieri and the unions. Within workplaces, the situation remains fragmented as companies continually seek solutions based on maximum flexibility. Job contracts provided by temporary agency work are often short-term. Some companies resort to both temporary agencies and subcontracting. Recently, a staffing agency and the first-tier contractor utilising it were targets of a union campaign in Marghera (Quondamatteo 2023) that led to an important dispute concerning work organisation and the precarity of migrant workers. Finally, some external firms do not use the most structured and recognised temporary work agencies, but resort to illicit labour brokerage. These cases involve the use of 'convenience' temporary work agencies, not accustomed to complying with labour standards.

### 3.2.2 National labour mobility

One of the main characteristics of Fincantieri's yards in northern Italy during the 1990s was the significant presence of workers from southern Italy. Internal migration from the South was a result of the deterioration of the southern labour market. Workers sought better living conditions in the North. Fincantieri succeeded and continue to succeed in mobilising and attracting a substantial number of southern workers through its subcontracting network across Italy.

4. The limits on the use of fixed-term contracts and temporary agency work were temporarily suspended during the pandemic in order to meet the demands of employer associations and to compensate for the administrative freeze on layoffs (the strictest among EU countries).

Many subcontracting firms are based in the Southern regions and operate in more than one shipyard.

These southern workers began their journey to Monfalcone and Marghera after selective recruitment by hundreds of small firms operating in their home regions (particularly Campania and Sicily). During the 1990s, these workers often found jobs in the least skilled and lowest positions within the shipyards. They started with occasional and temporary work assignments and gradually progressed towards more stable roles, in terms of both employment and residency.

### 3.2.3 International labour mobility

Simultaneously, foreign migrant workers began to play a significant role. First, immigrants came from the former Yugoslavia and Albania. In Marghera, there were workers from Africa (North African and South-Saharan countries). In Monfalcone, the presence of Croatian workers started to be important, also influenced by geographical proximity. Another important workforce component comes from Romania, with an increase as a result of EU enlargement. Additionally, Bangladeshi workers began to be recruited in the late 1990s both in Marghera and in Monfalcone. Over the years, they have become the most important community across all the shipyards.

The presence of international migrant workers at Fincantieri shipyards is segmented across the subcontracting chain. According to key respondents, their presence is statistically significant within first-tier contracting firms, and almost absolute in second-tier subcontracting firms. However, the presence of migrant workers varies across different shipyards. Plants in the South (Castellammare and Palermo) predominantly employ workers from Southern Italy, particularly from the area of Castellammare. At these two sites, the presence of migrant workers is smaller, although it is growing. Local trade unions are therefore starting to raise the question of how to reach migrant workers, a new issue compared with the yards in the North where migrant workers are more numerous and now longstanding (Interview with a shop steward, Palermo).

Detailed data on workforce composition with regard to Monfalcone shipyard appeared in a newspaper article in 2019 (Borsani 2019). About 500 external firms were employing 5,500 workers, half of them Italian. Second most prevalent were Bangladeshi workers: 1,155 (21 per cent). Among the other substantial communities were the Romanians (about 550, 10 per cent) and Croatians (about 330, 6 per cent). Some 67 different nationalities were represented, including workers from Slovenia, Bosnia, Serbia, Senegal and Ukraine. According to a union informant, in Marghera there are 800 workers from Bangladesh, 400 from Romania and 300 from various African countries (particularly Senegal and Congo). Additionally, workers from Croatia, Albania and Moldova are employed. There is also a growing presence of Chinese workers in steel processing (Interview with a trade unionist, Marghera). There is a growing recruitment of asylum seekers (Bangladesh, Pakistan) in some shipyards. This was witnessed by a worker responsible for a facility housing asylum seekers in La Spezia (Intervention at a study event

organised by CGIL in La Spezia, February 2024). Some immigrants living in this centre have been recruited through informal networks by subcontractors and have an extremely precarious legal position, which increases their vulnerability and exposure to over-exploitative conditions.

The situation of Croatian workers in Monfalcone is different.<sup>5</sup> They are skilled workers, with a high degree of professionalism based on Croatia's long shipbuilding tradition. After Croatia's entry into the European Union, these workers gained the right to move freely within the European labour market. Some grasped the opportunity to migrate to German or Finnish shipyards to obtain higher wages and labour conditions (Interview with a shop steward, Monfalcone). In contrast, other Croatian workers have returned to Croatia to assume supervisory roles in Croatian shipyards, now used by Fincantieri as external suppliers of ship sections. The different degrees of mobility across various segments of the workforce are often combined with skills, race, citizenship and migration status and contribute to the significant fragmentation of working conditions.

Bangladeshi labour began to be introduced mainly in the late 1990s and the early 2000s. Bangladeshi workers often undertake the most demanding and hazardous jobs, where cheap Italian labour is no longer available, for a number of reasons (often prohibitive working conditions, demographic trends and so on). For instance, 99 per cent of insulation work is carried out by Bangladeshi workers (Interview with a trade unionist, Marghera). The stratification of the labour force based on nationality, which began in the late 1990s, was consolidated in the 2000s. Bangladeshi workers have gradually established themselves within subcontracting companies. Some of them started small businesses in the sector. These firms are often in a precarious economic position but are able to recruit Bangladeshi workers with ease, combining market, personal and community coercion.

The ethnic segmentation of the workforce is pronounced. Direct workers are predominantly Italian, while the most skilled part of the workforce consists of workers from Eastern Europe. Bangladeshis are typically involved in low value-added tasks and are overrepresented in dirty, dangerous and demanding jobs. In addition to the aforementioned insulation, other production segments might be mentioned: grinding, painting and cleaning. The market pressure on contracting and subcontracting firms often leads them to pursue cost-containment strategies, not only with regard to direct and indirect wages but also the quality of protective equipment. This may increase work-related risks, such as dust exposure. Anyway, some Bangladeshi workers are beginning to enter more skilled professions, such as electrical installation and pipefitting (Quondamatteo 2023).

Bangladeshi workers are recruited through compatriot networks and sometimes through temporary work agencies. These networks may simplify access to work for workers without proficient Italian language skills but also entail community control over the workforce. For instance, Bangladeshi subcontractors contribute

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5. Their conditions can be analysed by following their mobility trajectories and are associated with those of 'multinational workers'. See Andrijasevic and Sacchetto (2016).

to Bangladeshi communities and cultural/religious associations, making it challenging for Bangladeshi workers to report irregular labour conditions. Community control over the workforce appears to be stronger in Monfalcone than in Marghera due to the former's smaller size and the lack of unionisation for migrant workers.

The previous working experiences of migrant workers are diverse. Eastern European workers often have experience in similar sectors, which is less common among Bangladeshis. Often Bangladeshi workers have few employment alternatives, particularly concentrated in informal employment. This makes shipbuilding work relatively attractive, despite the precarity rooted in the subcontracting chain.

### 3.2.4 Posted work

The Ministry of Labour Observatory provided data on posted work in 2021. Although not particularly disaggregated (shipbuilding is not separated from the rest of the metalworking industry), posted work is not prevalent in the Italian labour market. However, it should be noted that in the provinces in which shipbuilding is located (for example, Gorizia, Venice, La Spezia) secondment requests exceed the overall average. Despite their descriptive limitations, the data seem to indicate that posted work is present within the shipyards, but not in significant proportions. Existing flows are mainly from Romania.

This confirms the impressions we gathered in the field. In the 1990s, posted work (particularly from Croatia) was occasionally utilised by Fincantieri and its suppliers for various purposes and in different modalities (Merotto et al. 2000). However, it has never been a prevalent tool in the Italian shipyards because Fincantieri can rely on migrant workers already present within national territory. After acquiring shipyards in Europe, Fincantieri began using international posted workers to manage and coordinate various sites in Europe. Specifically, there is integration between Romanian and Norwegian shipyards with those of Marghera and Monfalcone (Interview with a trade unionist, Marghera). In some cases, Romanian workers are posted to Italian shipyards for a training period to acquire skills necessary to assume production coordination roles in Romania. A respondent states that this kind of posted work is regular and genuine (Interview with a trade unionist, Marghera) and can aid Romanian workers in their careers. Secondment is also present in the subcontracting chain, albeit in limited numbers. Although other tools and modalities exist for fiscal and wage dumping, this type of posted work is associated with limited compliance with labour standards, as noted by a trade unionist from Monfalcone (Interview carried out in Monfalcone).



### **3.3 Social partners, changes in sectoral industrial relations and labour market regulations**

#### **3.3.1 Main industrial relations actors**

The major trade unions in Italy's shipyards are: CGIL, CISL and UIL. Other trade unions are: UGL, FAILMS, USB and Slai Prol Cobas. Finally, the relevant employers' organisations are: Assonave and Confindustria Nautica.

The landscape of industrial relations and collective interest representation in the shipbuilding sector has always been very fragmented. Over the years, there has always been a significant polarisation between the largest enterprises, such as Fincantieri, and myriad small and medium-sized shipbuilding companies (Pedersini 1999). There is a union presence in some of the latter, but in other cases workers are not unionised. Outsourcing makes sectoral analysis more difficult. In fact, enterprises belonging to different branches of production may be involved (wood furniture, construction, artisan). In 2017, Eurofound produced a report on the representativeness of the European social partners in the shipbuilding sector (Eurofound 2017). With regard to Italy, the study identified ten employers' organisations related to the sector. The two major organisations are Assonave and Confindustria Nautica. Assonave, of which Fincantieri is a member, brings together various shipbuilding and ship repair companies. On the other hand, Confindustria Nautica primarily represents the interests of recreational yachting and boating firms. Both Assonave and Confindustria Nautica are members of Confindustria. The main trade unions operating in the sector are CGIL, CISL and UIL, although the Eurofound report (2017) reports the presence of other, smaller workers' organisations. Collective bargaining coverage for employees in the industry is estimated at 100 per cent, but this figure does not reveal much. In the Italian industrial relations system, any worker can apply to a court to have the application of sectoral collective agreements recognised. It is an ex-post extension mechanism of collective bargaining provisions, requiring legal proceedings. On the ground, the picture is more fragmented for a number of reasons: the overlap of several potentially applicable sectoral collective agreements; the role of outsourcing and subcontracting, accelerating processes of collective bargaining erosion; and the existence of many small companies, sometimes without a union presence that can ensure compliance with the regulations.

Even given these dynamics, Fincantieri is a significant case. Until 2000, Fincantieri was a member of Intersind, the employers' association of state-owned enterprises. In that year Intersind was shut down in a context of privatisation and dismantling of the state-owned industrial apparatus. Fincantieri then became a member of Confindustria. Fincantieri workers are covered by two tiers of collective bargaining: the national sectoral collective agreement of the metal industry, plus a Fincantieri-level collective agreement. The latter defines further provisions: corporate welfare, access to corporate kindergartens, production bonuses based on business results. In Fincantieri-level collective agreements, unions try to insert provisions to improve the labour conditions of subcontracted workers. This was done by inserting quality clauses for external firms in 1999. Most recently, other

aspects have been addressed: attempts to limit subcontracting in certain tasks or increased opportunities for shop stewards representing direct workers to deal with the health and safety of external workers. These provisions often remain on paper due to the high fragmentation of the production cycle and the limited ability of trade unions to impact work organisation.

On the trade union side, the major metal sector confederations are involved: FIOM, FIM and UILM on behalf of CGIL, CISL and UIL. As far as Fincantieri is concerned, these unions have a mirror organisation. All three have a national working group which includes shop stewards of the eight shipyards and trade union officials from the relevant provinces. These working groups are coordinated by an official of the national confederation who keeps track of what is going on at Fincantieri. Having a similar organisational structure allows unions to confront each other more easily. The three unions have different cultural orientations: FIM and UILM are more focused on direct employees, while FIOM tries to broaden the focus in an inclusive manner towards subcontracted and migrant workers. These attempts by FIOM are not driven by a national strategy but by the different practices of local branches. This reflects a plurality of strategies that have different results on the ground.

Industrial relations within subcontracting chains are poorly developed. We have previously mentioned the proliferation of different wage regimes. Moreover, the market mechanisms adopted by Fincantieri to manage its outsourcing have led to the replacement of so-called historical contractors with new ones (Interviews with unionists and workers, Monfalcone). Some historical firms ensured two tiers of collective bargaining, in a framework of social dialogue with trade unions. Cost-containment strategies pursued by Fincantieri have made it difficult for these more structured companies to secure tenders in the face of low-cost bids. This has been an important factor in the de-unionisation of the subcontracting chain. In any case, the collective bargaining structure tends to reproduce the inequalities among direct and indirect workers. The issue of performance bonuses is emblematic. In fact, productive achievements are reached through the work effort of external employees, covering most activities. Fincantieri's company collective agreement redistributes part of the productivity gains only to direct workers. Because union membership is entrenched in this group, even workers' organisations can be prudent in calling for a more egalitarian redistribution (which would result in less variable wages for core workers).

Finally, the presence of minor trade unions should be mentioned. With regard to direct workers, a minority of shop stewards in some shipyards belong to small organisations such as UGL (right-wing union) and FAILMS (independent union). The focus of their union action is individual assistance and micro-lawsuits. Regarding the subcontracting chain, two grassroots and militant trade unions (Slai Prol Cobas and USB) try to take care of migrant workers, although these unions are not present in all shipyards. They act through court cases or attempt to intercept migrant workers outside the workplace, in the sphere of social reproduction. However, this presence is reduced and subject to numerous structural limitations (for example, the limited economic resources available to these small unions).

### 3.3.2 Remuneration schemes within the subcontracting chain: pay scales vs global wage

External firms operate in an extremely competitive environment, where costs are passed on to the lowest tier of the chain. This allows Fincantieri to maintain competitive prices and consolidate its position in the global market. Tenders often bring first-tier contractors low profit margins. This results in a push for subcontracting and externalising. In this context, the provisions defined by the collective bargaining have little application within the subcontracting chain. Therefore, there are two very different wage regimes within the shipyard: the union wage regime and the global wage regime. The former complies with the pay and contribution scales of collective agreements. However, this system is used by only a few external firms.

On the other hand, many contractors and subcontractors use the global wage. This is a remuneration scheme based on individual bargaining between the employer and individual employees. It provides for the monetisation of many items making up the overall salary structure: additional surcharges for nights and holiday shifts, thirteenth month pay, severance pay, paid time off, social security, sick pay, overtime. All these items are combined with the base wage in a lump-sum monthly fixed amount. Dividing this amount by the hours worked by the single employee gives a precise figure. This figure is the individually contracted hourly wage. It is defined as 'global' because it contains all remunerative items. This system enables discretionary management of the workforce and is accompanied by structural tax and social security evasion. The global wage system is complex: sometimes it may be more consensual, sometimes more coercive. In any case, its presence tends to reproduce a distance between subcontracted workers and the classic union regulation of collective bargaining. This vast grey zone helps to multiply the fragmentation of working conditions within Fincantieri's shipyards.

### 3.3.3 Impact of EU regulations

In the period between the introduction of the single market and the early 2010s, EU regulations affected the Italian shipbuilding industry by forcing its radical restructuring. Italy was the recipient of repeated European Commission infringement procedures for its state aid to national companies. More recently the relevance of EU regulations has been less clear cut.

Interviews with social actors indicate little interest in EU regulation. This is also because of the limited impact of posted work within the shipyard. More attention is paid to national regulation. Neoliberal reforms in recent years (for example, the liberalisation of temporary contracts), in part introduced under pressure from European institutions following the financial crisis, are felt to be an obstacle to union action but there was no sectoral campaign similar to the one that led to the regulation of the German meat industry. The proposal of a statutory minimum wage has entered the debate in recent years and is supported by small grassroots unions, but it is not seen as decisive by the main trade unions, given that the main collective agreements (such as the one in metalworking) set higher wages, and in

the subcontracting chain the main problem is the systematic evasion of wage and contribution rules.

In some shipyards (mainly Marghera and Ancona), FIOM started systematically to resort to court action to counter the most serious cases of exploitation of migrant and subcontracted workers. Given the difficulty of taking industrial action, the criminal law is seen as a tool to help workers and unions to report structural distortions within the industry and to crack down on the most significant violations of labour rights.

### **3.4 Working and living conditions: further considerations**

#### **3.4.1 Precarious conditions for migrant workers**

As already mentioned, migrant workers play a key role in the shipyards. They are employed by external firms and their conditions vary in accordance with such factors as skills, tasks performed within the production process, migration status (EU citizenship; long residence permits; short residence permits; asylum seeker status), seniority and migration pathway.

Some have short-term contracts, but even those with permanent contracts live a precarious existence. In fact, subcontracting companies are never certain that they will be hired to work on the next ship. Being substantially dependent on Fincantieri contracts, such firms are always one step away from bankruptcy. There is high turnover among external companies, especially the smaller ones. Additionally, migrant workers are much more likely to experience labour market violations, such as non-recognition of seniority pay, contractual under-classification and various forms of wage theft.

Many migrant workers are economically dependent on overtime. In some tasks in particular, it is common for them to work several hours more than the working time laid down by collective bargaining (173 hours a month). Overtime hours are often not reported, which is also facilitated by the lack of transparency in the system recording workplace entry and exit. Even health and safety regulation violations disproportionately affect migrant workers, including the provision of inadequate and very cheap safety equipment (such as anti-slip shoes, gloves or anti-dust masks). Moreover, some subcontracting firms do not have access to some Fincantieri facilities. Thus, their workers, often migrants, cannot use changing rooms or eat a capped rate meal at the canteen.

Two more aspects deserve mentioning. First, the role of those who facilitate the access of migrant (particularly Bangladeshi) workers to the labour market, and second expectations associated with gender roles. In the first case, a plurality of situations may arise. In the most severe cases, labour market access is mediated by gangmaster or different kinds of labour market intermediaries. Their involvement may entail payment of a fee to get the job; established forms of wage theft (part

of the wage is handed over in cash to the labour market intermediary and/or the employer); and the use of physical threats or violence to extract maximum labour effort. In other cases, getting a job through the informal sponsorship of a friend or a family member may make it difficult to complain about working conditions. Victims may be swayed by fears of getting the person who found them the job in trouble. Community ties therefore play a complex role in defining migrant workers' labour conditions. Regarding gender roles, these may tend to reinforce the stereotype of the male breadwinner, especially in migrant households in which women have only minimal access to the non-domestic labour market. Expectations associated with the male breadwinner can reinforce dependence on the income sustaining the whole family.

### 3.4.2 Welfare and unemployment benefits

Fincantieri and the trade unions recently signed an agreement to develop company kindergartens (Fincantieri 2022). This service is reserved for direct workers, although FIOM has called for the inclusion of a clause to allow for the possible access of indirect workers. However, FIOM's national coordinator for shipbuilding acknowledged that this is just a formal commitment because the available places in kindergartens are likely to be filled by the children of direct workers (Interview with the national coordinator of FIOM for shipbuilding, Rome). The enjoyment of corporate welfare, covering direct employment, represents an additional mechanism of inequality among Fincantieri's employees and external workers.

Another factor to consider is the access of non-EU migrant workers to public welfare. In Monfalcone, the right-wing local government implemented a series of welfare chauvinist measures to exclude Bangladeshi workers from rent subsidies or access to social housing (Interviews with several key respondents, Monfalcone). These measures were recently overturned by the courts as unconstitutional, but were part of a general trend towards exclusion and discrimination. Welfare can contribute to the partial de-commodification of migrant workers' lives, but exclusionary policies can further increase their dependence on the labour market, multiplying precariousness and vulnerability.

Unemployment benefits are linked to social security contributions. Monetisation mechanisms of different wage items (global wage) reduce this amount, thus decreasing the possible level of unemployment benefit to which a worker is entitled.

### 3.4.3 Accommodation

Housing is one of the main monthly expenses for workers. The situation is particularly acute in Monfalcone for various reasons. First, the town is small and the supply of houses for rent is limited. This results in high prices. Second, social housing is scarce. It is inadequate to people's needs and the market can be turbulent. The discriminatory policies of right-wing local government, as already mentioned, exacerbate this.

Otherwise, in both Monfalcone and Marghera, the most stable and less precarious portion of Bangladeshi workers prefer to buy small apartments with a mortgage rather than stay in the rental market. Other Bangladeshi migrants pool their resources and live in overcrowded apartments to lower the cost of living. This includes both male workers without families and multiple households (two or three) sharing an apartment.

In Monfalcone, some companies employing Eastern European workers have bought flats to house their employees. According to key informants, this seems to pave the way for informal agreements between business owners and workers on rental costs (through wage adjustment or daily management of work performance).

#### 3.4.4 Impact on the wages and working conditions of the native workforce

The increasing use of migrant labour has gone hand in hand with the intensification of outsourcing. The impoverishment of working conditions has made many jobs performed by migrant workers unattractive to the native workforce. On the other hand, the use of foreign labour is also a response to labour shortages. Thus, it can be said that these processes are due to a complex intertwining of profitability and other factors (including demographics). Inside the shipyards, a complementarity may be noted within ethnic hierarchies between Italian and migrant labour. However, there have also been cases of direct competition among native and migrant workers, marked by low-cost tenders and social dumping. At the Monfalcone shipyard (Quondamatteo 2024), a contracting painting firm employing mainly Italian workers had signed a firm-level collective agreement with the trade unions, improving the provisions set by the national sectoral collective agreement. Against the backdrop of a financial crisis, this firm was no longer able to compete with other companies offering very low bids. These market pressures put this firm out of business. A new contractor took its place, but it did not rehire the old workforce and instead recruited new ones, including many migrants. The impact of migrant workers on the native workforce is therefore quite varied.

## 4. Case studies

### 4.1 Case study A: Marghera

Unions are recognised at the Marghera shipyard, resulting in both cooperation and conflict between the two sides. The main union actors are the metalworkers' branches (FIOM, FIM and UILM) of the three main unions (CGIL, CISL and UIL). There are also smaller unions, such as FAILMS and Slai Prol Cobas. FAILMS acts for direct workers in individual disputes. Slai Prol Cobas is a rank-and-file union that attempts to organise migrant indirect workers. FIOM has repeatedly denounced the extreme precarity of subcontracted workers, often appealing to the courts in the most severe cases. FIM and UILM seek to collaborate with Fincantieri to solve everyday issues, without caring much about subcontracted workers.

Over the past 30 years, there has been a significant drop in union membership among direct workers. At the Marghera shipyard, the percentage of unionised workers went from 80 per cent in the 1990s to 40 per cent by 2020 (Interview with a trade unionist, Marghera). The unionisation of third-party company workers is lower and more difficult. These firms are often small and migrant workers are more exposed to illicit pressure. Recently, FIOM-CGIL launched a process to organise migrant indirect workers, managing to appoint workers' representatives (RSUs) in some contracting and subcontracting firms. (Quondamatteo 2023; Interview with a trade union official, Marghera), namely Arcobaleno, Delat, Isolfin and Humangest (FIOM CGIL 2021; FIOM CGIL 2022a). Some of the workers involved in this unionisation process have been in Italy for a long time.

#### 4.1.1 The role of workers' representatives

FIOM shop stewards do not focus on direct employees alone but also try to engage with contracting and subcontracting workers: 'FIOM's shop stewards and offices have long been engaged in efforts to counteract the numerous irregularities that have become structural in Fincantieri's subcontracting system' (FIOM CGIL 2018). FIOM has called for Fincantieri to sign agreements to make the subcontracting chain more transparent (ibid.).

#### 4.1.2 Protecting migrant external workers

Migrant indirect workers often join trade unions in a non-traditional manner. Companies are supposed to withhold union membership fees from workers' pay checks and pass them on to the union. In an anti-union environment in which labour is structurally vulnerable, however, the company is not notified of union membership in order to avoid reprisals.

#### 4.1.3 Union strategies/conflicts

In 2018, the regional branch of FIOM submitted a legal complaint. This won immediate media coverage, being picked up by local and national newspapers, as well as the television programme *Report*. The legal complaint was part of the launch of legal proceedings involving Fincantieri's executives and the owners of some subcontracting firms. The alleged offenses include labour exploitation, illicit labour brokerage, as well as private corruption among firms the the management of tenders (FIOM CGIL 2022b). CGIL, CISL and Slai Prol Cobas are civil parties in the trial (Amadori 2023). According to FIOM, 'this proceeding is the most important involving Fincantieri; it may highlight the presence of exploitative systems connected to contracting out and subcontracting' (FIOM CGIL 2022b).

Regarding strikes, there was some mobilisation during the pandemic. These focused on workplace safety. Within the subcontracting chain, a few important mobilisations – organised by FIOM – involved painting and insulation firms (Quondamatteo 2023). These struggles saw a prominent role on the part of Bangladeshi workers. The driving factors included: (i) the precariousness of the subcontracting chain; (ii) turnover among firms, which cyclically put jobs and economic conditions at risk; (iii) recognition of the right to unionise; (iv) blame-shifting among first-tier and second-tier contractors, making it difficult to identify responsibility for decisions penalising workers; (v) the 'paga globale' (global pay) system; (vi) wage arrears; and (vii) heavy use of temporary contracts. Some mobilisations resulted in partial agreements that improved the current situation, but the context of the subcontracting chain continues to structurally reproduce distortions.

#### 4.1.4 Union strategy at the international level

Nothing relevant at this shipyard.

#### 4.1.5 Skills and training

In 2021, Fincantieri invested €5.1 million in training schemes to 'strengthen company know how and to develop new transversal skills with a view to lifelong training' (Fincantieri, Formazione e Sviluppo). In the scheme, each direct employee had an annual average of 20.7 training hours through the training programmes. According to some respondents, however, many training courses



have been converted into online courses. FIOM criticised this, arguing that online instruction degrades the quality of training as employees pay scarce attention and their participation is haphazard (Interview with a unionised worker, Marghera).

Concerning the subcontracting chain, FIOM argued that training is absent or inadequate to the complexity of the tasks and working risks. According to the union, there are in fact only formal training courses. In addition, language barriers are an obstacle.

#### 4.1.6 Technology

According to some respondents, the technology used within the shipyard has evolved only at certain stages of the production cycle. In the case of hull processing, this happened regarding the production of large panels.

The assembly phase is still labour-intensive, supported by mechanical technologies (such as cranes).

### 4.2 Case study B: Monfalcone

#### 4.2.1 Preliminary information

Some sections of ships are produced in Romanian shipyards (Vard), and others in Croatian shipyards, used by Fincantieri as external suppliers.

Monfalcone shipyard is the largest and Fincantieri management devotes more attention to it, also because of the need to deal with larger workforces.

#### 4.2.2 Major trade unions

The local branch of FIOM takes a different approach from other Fincantieri shipyards, such as Genoa and Marghera. An official has defined this mode of intervention as 'more pragmatic and less ideological' (Interview conducted in Monfalcone). FIM generally takes a collaborative approach with Fincantieri, while UILM tries to pursue 'a third way between being a conflictual union or a merely participatory one' (Interview with a shipyard's shop steward, Monfalcone).

External companies are rarely unionised, with the significant exception of a sandblasting and painting firm. FIOM tried to involve some Bangladeshi workers in 2010 but after the failure of that initiative recruiting activities dropped off considerably. FIOM continues to bring in some migrant workers who turn to the union only in the case of extreme need (Interview with a trade union official, Monfalcone). FIOM has been distributing multilingual flyers (Italian, Romanian, Serbo-Croatian, Bangladeshi) to communicate its stance with the entire workforce (Interview with a shipyard's shop steward, Monfalcone). UILM tries to recruit

migrant external workers individually by explaining the benefits of union membership through concrete examples (Interview with a plant's shop steward). FIM's activity is essentially aimed at providing individual services to workers.

### 4.2.3 Workers' representatives

In the last two elections for Fincantieri shop stewards, FIM was the most popular trade union, overtaking FIOM. This is partly due to the new composition of the direct labour force, within which the white-collar component counts for much more than in the past. Labour-intensive production is now carried out mainly by external workers. As a result, the shop stewards represent a less blue-collar direct workforce. Although not definitively, this may favour a more moderate stance on the part of the shop stewards (Interview with a shipyard's shop steward, Monfalcone), focused mainly on the core workforce.

### 4.2.4 Alternative forms of mobilisation

During the fieldwork (2020–2024) the level of mobilisation was quite low, unlike in Marghera. There were some developments to report, however.

The grassroots trade union USB collaborated with a small and local civil society organisation (AMI – Associazione Monfalcone Internetnica). AMI's aim is to promote the social inclusion of immigrants (particularly Bangladeshis) in a context of heavy institutional racism practiced by the local government. USB and AMI have gone to court to challenge certain discriminatory measures penalising Bangladeshi workers in accessing municipal welfare (social housing and rental bonuses). USB is therefore trying to support immigrants in their daily life, hoping to build trust-based ties for possible future unionisation within the workplace (Interview with a grassroots union activist, Monfalcone). USB has also tried to organise training courses for migrant workers, coupling the teaching of Italian with the explanation of some basic concepts regarding workers' rights (for example, how to read a pay slip correctly).

The rank-and-file union Slai Prol Cobas has also issued lawsuits to defend Bangladeshi workers. Slai Prol Cobas is able to contact some Bangladeshi employees thanks to a union service centre at which a Bangladeshi person works. This enables them to cope with the language gap.

Moreover, there are also non-union service centres run by Bangladeshis at which workers can undertake a range of tasks (renewal of residence permits, filling in documents for family reunification, tax declaration). One of these centres collaborates with a private lawyer, who has instigated some labour lawsuits (individual and collective) to defend outsourced and migrant workers' rights. On other occasions this centre directs workers to approach trade unions (particularly CGIL and/or Slai Prol Cobas).

In December 2023, the Bangladeshi community – composed of many workers at the shipyard – mobilised against a municipality decision banning prayer in Islamic centres (Quondamatteo 2024). The demonstration brought thousands of people onto the streets, making evident its self-organisation capability. While not directly related to labour issues, this mobilisation involved many workers without trade union support. This has opened up an ongoing discussion within CGIL on the need to renew its practices to better involve these workers.

#### 4.2.5 Site visit

A guided tour of the Monfalcone shipyard was made thanks to the local shipbuilding museum. It was a short tour, with explanations by a trained guide.

#### 4.2.6 Work organisation

Monfalcone shipyard is similar to the Marghera, but in the context of a larger site. This means that contracting out and subcontracting have more impact, particularly in the stages immediately preceding a ship's launch. In this phase, there is heavy demand for many temporary cleaning workers. These tasks are carried out by female Italian and Romanian workers. Women are employed to clean the ship's surfaces, while the ordinary industrial cleaning is done by male workers. This adds gender segmentation to a male-dominated workplace.

According to some respondents (for example, interview with the then mayor of Monfalcone), the intensification of subcontracting was reinforced by Fincantieri's decision to build more than one cruise ship at a time.

The heavy use of subcontracting can result in organisational problems. Attempts to improve the flow of operations among a workforce fragmented into hundreds of different external companies with in-house supervisors may be difficult. Problems may recur given the high turnover of subcontracting companies in outfitting and the great difficulty of transmitting information about errors. The repair of already completed parts adds a critical element, given the extremely rigid delivery times imposed by commissioning shipowners. This affects various workforce segments, especially those belonging to external companies. They have to be constantly available and thus vary their working hours far beyond the usual daily and weekly limits.

## 5. Discussion, conclusion and future prospects

The shipbuilding sector in Italy consists of a multitude of small and medium-sized specialised producers, mostly in boat production, and one large state-controlled holding with a dominant position in Europe in both military and civil vessels. The sector is characterised by the substantial use of foreign labour following a sharp decline in the availability of Italian workers for both skilled and unskilled positions.

At Fincantieri, the particularly substantial use of foreign labour has resulted in an extreme case of segmentation, in which different lines of fragmentation reinforce each other: residential status (nationals, posted workers, migrants on labour visas), organisation (outsourcing of 80 per cent of the workforce) and collective bargaining (different agreements for different operations). The outcome is a very difficult to control differentiation of labour standards, with frequent reports of exploitation and wage theft among the workers, mainly Bangladeshi, at the weakest part of the subcontracting chain.

While this situation of entrenched inequality has so far proved economically viable and is therefore still supported by the main political and economic decision-makers, it has major negative externalities that become manifest in particular in ethnic tensions in the local area, most visibly in the town of Monfalcone, where the populist right is very active.

Trade unions are aware of the problem and attempt to reduce the deepening gaps among different categories of workers, as demonstrated by company-level collective agreements that in recent years have included some safeguards on subcontracting.<sup>6</sup> Nonetheless, these efforts to date have been insufficient to counterbalance the inequality effects of a segmented recruitment, organisation and regulatory system. At the same time, the state-controlled nature of the company has kept trade unions much more interested in the national level rather than the international one, with so far only embryonic attempts at fostering European-level solutions. Finally, the role of the state in Fincantieri's ownership has not been significantly leveraged by the trade unions to improve the condition of outsourced

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6. The agreement foresees a commitment to reduce subcontracting in certain areas, including through the use of temporary agency work by first-tier contractors. However, a more complete evaluation can be made only over time, as the situation remains fragmented, with first-tier contractors continuing to use both subcontracting and temporary agencies, either alternatively or simultaneously.

and migrant workers. On the contrary, state ownership has been crucial in keeping all national shipyards in operation.

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All links were checked on 17.10.2024.



## Appendix

### 1. Publications, communications and drafts

#### Publication

Quondamatteo N. (2022) Dentro le navi, il mondo intero. Un'analisi del sistema degli appalti nel caso Fincantieri, Quaderni di rassegna sindacale, 2, 51–61.

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Iannuzzi F.E., Meardi G., Quondamatteo N. and Sacchetto D. (2024) One factory, many regimes. Outsourcing, segmentation and industrial relations in Fincantieri yards, SISEC, Cagliari, 31.01.2024–03.02.2024.

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### **Statistical appendix – table and figures**

Table 1 Fincantieri's shipyards and production specialisation

Table 2 Indirect workforce and third-party companies at the Marghera shipyard

Table 3 Direct and indirect workforce of the Fincantieri shipyards

Sources: Gaddi (2022) and interviews carried out with shipyards' shop stewards

### **Other information**

Gross national production – volume, value (perhaps also profits/value added)

Production in main product groups, such as cruise, offshore, ferries, fishing boats etc.

Overall national shipbuilding: completions in thousands by ship types in thousands of CGT, all vessels from 100 GT, 2013–2022 (OECD 2024):

- chemical tankers: 17
- cruise: 4392
- dredgers: 8
- ferries: 223
- MPP: 9
- offshore: 50
- other non-cargo: 24
- ro-ro: 54
- tugs: 13

### **Employment**

- Total employment in the industry (overall national shipbuilding): 105,300 in 2021 (Unioncamere 2023)
- Direct/indirect workers (Fincantieri): 10,000 c.a. vs 21,000/28,000 c.a.
- Migrant workers in the subcontracting chain (Fincantieri/Monfalcone shipyard): 5,500 indirect workers, ca. 50 per cent migrant workers (21 per cent Bangladeshi, 10 per cent Romanian, 6 per cent Croatian), excluding those who have already obtained citizenship (Borsani 2019).

### **Wages and working conditions**

- Annual gross labour costs incurred by Fincantieri in 2021 (white- and blue-collar workers): €55,551 (Gaddi 2022)
- Annual gross labour cost incurred by seven external firms (Fincantieri subcontracting chain) under scrutiny: €29,880–€34,660

## 2. List of interviewees

N°	Date	Respondent	Site	Interviewer(s)
1	15-06-2020	Trade unionist	Monfalcone	Nicola Quondamatteo
2	15-06-2020	Labour lawyer	Monfalcone	Nicola Quondamatteo
3	15-09-2020	Local NGO representative	Monfalcone	Nicola Quondamatteo
4	25-09-2020	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
5	26-09-2020	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
6	15-05-2021	Former shipbuilding manager	Monfalcone	Nicola Quondamatteo
7	15-05-2021	Trade unionist	Monfalcone	Nicola Quondamatteo
8	29-05-2021	Representative of grassroots union	Monfalcone	Nicola Quondamatteo
9	29-05-2021	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
10	29-05-2021	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
11	30-05-2021	Shop steward	Monfalcone	Nicola Quondamatteo
12	01-07-2021	Trade unionist	Monfalcone	Nicola Quondamatteo
13	20-09-2021	Focus group with shop stewards	Marghera (Venezia)	Devi Sacchetto, Francesco E. Iannuzzi and Nicola Quondamatteo
14	20-09-2021	Focus group with Bangladeshi outsourced workers	Marghera (Venezia)	Devi Sacchetto, Francesco E. Iannuzzi and Nicola Quondamatteo
15	14/11/2021	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
16	03/03/2022	Former trade unionist	Monfalcone	Nicola Quondamatteo
17	07/03/2022	Bangladeshi subcontractor	Monfalcone	Nicola Quondamatteo
18	10/03/2022	Trade unionist	Marghera (Venezia)	Nicola Quondamatteo
19	18/03/2022	Trade unionist	Monfalcone	Nicola Quondamatteo
20	22/03/2022	Representative of grassroots union (follow-up)	Monfalcone	Nicola Quondamatteo
21	30/03/2022	Italian direct employee of shop steward	Monfalcone	Nicola Quondamatteo
22	04/04/2022	Former trade unionist	Monfalcone	Nicola Quondamatteo
23	06/05/2022	Operator of tax assistance service for workers, Bangladeshi	Monfalcone	Nicola Quondamatteo
24	09/05/2022	Trade unionist	Marghera (Venezia)	Nicola Quondamatteo
25	12/05/2022	Shop steward	Monfalcone	Nicola Quondamatteo
26	13/05/2022	Shipbuilding manager	National role	Nicola Quondamatteo
27	14/05/2022	Bangladeshi subcontractor	Monfalcone	Nicola Quondamatteo
28	20/05/2022	Trade unionist	Monfalcone	Nicola Quondamatteo
29	21/05/2022	Bangladeshi worker	Monfalcone	Nicola Quondamatteo
30	25/05/2022	Bangladeshi subcontractor; Tax consultant	Monfalcone	Nicola Quondamatteo
31	26/05/2022	Sector expert	Monfalcone	Nicola Quondamatteo
32	31/05/2022	Italian direct worker	Monfalcone	Nicola Quondamatteo
33	31/05/2022	Trade unionist	National role	Nicola Quondamatteo
34	30/08/2022	Bangladeshi worker and grassroots unionist	Monfalcone	Nicola Quondamatteo

N°	Date	Respondent	Site	Interviewer(s)
35	11/11/2022	Labour lawyer	Monfalcone-Marghera (Venezia)	Nicola Quondamatteo
36	17/11/2022	Shop steward	Palermo	Nicola Quondamatteo
37	03/02/2023	Trade unionist (follow-up)	Marghera (Venezia)	Nicola Quondamatteo
38	05/02/2023	Bangladeshi worker	Marghera (Venezia)	Nicola Quondamatteo
39	15/02/2023	Local policy-maker	Monfalcone	Nicola Quondamatteo
40	30/03/2023	Italian direct worker	Monfalcone	Nicola Quondamatteo
41	12/10/2020	Trade unionist	Marghera (Venezia)	Francesco E. Iannuzzi
42	13/10/2020	Trade unionist	Roma	Francesco E. Iannuzzi, Devi Sacchetto
43	1/2/2021	Trade unionist	Marghera (Venezia)	Francesco E. Iannuzzi, Devi Sacchetto
44	13/03/2021	Focus group with shop stewards	Marghera (Venezia)	Francesco E. Iannuzzi, Devi Sacchetto
45	26/2/2021	Former production engineer	Monfalcone (Gorizia)	Francesco E. Iannuzzi, Devi Sacchetto, Nicola Quondamatteo
46	26/02/2021	Local NGO representative	Monfalcone	Francesco E. Iannuzzi, Devi Sacchetto, Nicola Quondamatteo
47	2/3/2021	Trade unionist	Sestri (Genova)	Francesco E. Iannuzzi, Devi Sacchetto
48	26/3/2021	Former production engineer	Monfalcone (Gorizia)	Francesco E. Iannuzzi
49	24/2/2021	Trade unionist	Marghera (Venezia) Venezia	Francesco E. Iannuzzi, Devi Sacchetto
50	24/2/2021	Trade unionist	Marghera (Venezia) Venezia	Francesco E. Iannuzzi, Devi Sacchetto
51	01/06/2021	Trade unionist	Ancona	Francesco E. Iannuzzi
52	4/6/2021	Trade unionist	Trieste	Francesco E. Iannuzzi
53	1/6/2021	Trade unionist	Palermo	Francesco E. Iannuzzi
54	17/3/2021	Migrant information desk official	Venezia	Francesco E. Iannuzzi
55	6/11/2020	Shop steward	Venezia	Francesco E. Iannuzzi
56	28/06/2023	Outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan
57	27/05/2023	Outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan
58	18/04/2023	Trade unionist	Ancona	Manuel Trevisan, Francesco E. Iannuzzi
59	12/07/2023	Outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan
60	12/07/2023	Outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan
61	24/05/2023	Italian direct worker	Ancona	Manuel Trevisan
62	24/05/2023	Outsourced Italian worker	Marghera (Venezia)	Manuel Trevisan
63	12/05/2023	Outsourced Italian worker	Monfalcone	Manuel Trevisan
64	28/04/2023	Former outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan
65	10/07/2023	Outsourced migrant worker	Marghera (Venezia)	Manuel Trevisan



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