

The future of port networks between
the Mediterranean and the Silk Road:
the role of Campania ports

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Changes in the Mediterranean scenario

The destiny of humanity and the evolution of civilisation are increasingly linked to the sea. 'Those who can control the sea and the ports hold the economic, political, military, social and cultural power. It is through the sea that ideas and goods have been circulating for thousands of years, it is through the sea that competition and division of labour are organised; still today more than ninety per cent of goods and communications transit on the sea' (Attali, 2017). The sea has also attracted an increasing number of people: 'in 2017, 60% of the world population lives within 150 km from the coastline, a figure which amounted to only 30% one hundred years ago' (Attali, 2017).

Maritime transports have made globalization possible by significantly reducing the costs of connections: once we consider the great impact that innovations in maritime logistics have had, it is easy to debunk the stereotype that it was only due to the low cost of labour that manufacturing activities were delocalized to emerging countries.

For instance, a \$1,000 television produced in Shanghai and sold in Antwerp will cost \$10 to transport by sea and \$70 by air. Without the economies of scale granted by the reorganization of maritime services and without an efficient network of communications, with decreasing prices, globalization would have remained a lame duck.

In the context of this unceasing and steady 'maritimisation' of the economy and of Mediterranean society, the sea is playing a key role again, after centuries of being overshadowed by the Atlantic and Pacific Oceans.

This role regards not only the transit of ships sailing long routes between Asia, Northern Europe and the East coast of the US, but also the intra-mediterranean flows which represent a growing opportunity due to the prospective possibility of connecting Southern Europe with North Africa and the West Med into a whole economic community.

The Mediterranean has always been both a meeting point and a battlefield for numerous civilisations. The history of the predominant cultures and religions springs from the complex events that characterized the relationship between land and sea. 'It is not one landscape, but numerous landscapes, It is not one sea, but a complex of seas. It is not one civilisation, but a number of civilisations, piled one above the other' (Braudel, 2017, p. 5). The overlap of civilisations piled one above the other in a region full of relations and in spaces that are often points of contention for the control of traffic and raw materials is a concept often repeated when the history of the Mediterranean is told.

'Millenary space of civilisations piled one above the other, each coming from a triumph and prelude to a fall, the Mediterranean knows the game of chasing, overlapping

and contrasting truths that seek immortality to win the most important victory, that against time' (Migliorini, 2017, p. 7-8).

The millenary roots of civilisation spring from the Mediterranean basin which has always been a place of confrontations leading to significant changes in the advance of knowledge. 'The Mediterranean is a very ancient crossroads on which, for thousands of years, everything has converged - men, beasts of burden, vehicles, merchandise, ships, ideas, religions and the arts of living. Even plants.' (Braudel, 2017, p. 6). The royal park of Capodimonte and the gardens of Caserta Royal Palace would have never been what they are if there had not been the spread of crops and essences that are part of the genetic heritage of Mediterranean regions.

The Mediterranean has escaped homogenization as a consequence of different civilisations and origins: 'the Mediterranean is composed of several subsets that defy or refute several ideas received' (Matvejevic, 2008, p.23). Nevertheless, within a framework of respect and conservation of differences, the fusions and intersections that have taken place have also modified the sense and course of history.

The Bronze Age would not have existed without navigation in the Mediterranean. 'Bronze is in fact an alloy of two metals whose mines are located at opposite ends of the great sea and even beyond its basin: copper, present in abundance between Cyprus and the Arabian desert, and pond, of which are rich the Iberian peninsula and Cornwall' (Cardini F. , 2014, p. 11).

Therefore, the economic dimension is not the only one to take into consideration, if we want to understand the potentialities that could arise if the Mediterranean returned to be a central place in the organization of the social and productive life of our times. The displacement of maritime barycentres in history is one of the main keys for analyzing the geostrategic perspectives between peoples and states: the centuries of the Atlantic and Pacific oceans have overshadowed the Mediterranean centrality that had characterized the cradle phase of civilizations.

"Today the Mare Nostrum is more than ever a meeting point of civilisations: we need a critical and thorough reinterpretation of the political and ethical dynamics that have intertwined in this area for millennia. This is mainly necessary to allow the encounter with the other, the different from us" (Idotta, 2009, p. 7).

Within the change of international balances, the Mediterranean appears to be a liquid frontier that may represent the cradle of significant future transformations for the future of the world. Currently, the most analysed and visible component is that of the clash of civilisations, mainly due to the state of tension involving different states and religions. Politicians have a daunting but nevertheless necessary task: to mitigate conflicts and pave the way for a cooperative horizon to emerge.

The economic development of Med countries is itself dependent on an ability to take advantage of the tools of potential coordination and shared strategy which can favour a more prominent role of exchanges rather than conflicts. Therefore, the increased frequency and quantity of connections through the Mediterranean represents one of the possible key factors to reshape the future scenario.

Mediterranean routes



Figure 1 - Source: SRM

We are currently living in times when the encounter with the other runs the risk of turning into a conflict mainly due to the fears provoked by emerging instability in the Med area and by the long-standing economic crisis begun in 2007. These phenomena lead us to consider risks more than opportunities, which has a consequence in all aspects of economic and social life: migrations, protectionisms and labour.

Analysing the current phenomena from a historical point of view appears to be appropriate and necessary: "History prevents us from making mistakes since we understand all the peculiarities of what was successful in a certain period and cannot, possibly, work in different times" (Amatori, 2013, p. 13). It is therefore impossible to make comparisons which, notwithstanding their allure, do not seem to fit the present context.

The Mediterranean, similarly to the rest of the West, has experienced a long-standing period of prosperity and balance characterized by the Cold War: the clash between opposing blocs has given way to a more liquid, articulated and complex situation where the different players seek a position.

The Mediterranean is again central also due to the redefinition of hierarchies of power, politics and economics.

We are currently living a moment of radical discontinuity in geostrategic structures: 'We happen to live in one of those moments of history where everything moves, creaks, flickers and, suddenly, old customs collapse and new bizarre phenomena emerge from the cracks that change produces' (Fagan, 2017, p. 17). We must be able to grasp the signals of transformation that appear on the horizon, and which are destined to change sooner than we imagine.

Instead, we often continue to interpret the phenomena through the lens of a rear-view mirror, carefully interpreting the facts with schemes that are not able to decode reality instead of trying to imagine the new ways through which economic and social forces are combined.

"The decline of Europe, a political dwarf, under the hegemony of Germany, is reflected in the lack of a European position towards the Mediterranean tragedies, in its absence on the global diplomatic stage and in the decline of its cultural and humanistic life, which has always been its core" (Sapelli, 2018, p. 47).

Therefore, it is exactly in the Mediterranean area that we can witness the contradictions of the unbalanced European structure, which seems to be based on weak foundations in its political initiatives. A union incapable of designing a more directly influential strategy in a space like the Mediterranean cannot possibly candidate itself as a credible international interlocutor. In particular, it is the North African area that most clearly shows the incoherence of the different national interests that have prevented the creation of a shared European vision of the future.

What is also changing are the criteria underlying the choices of international politics. The strategies of the contemporary world - and the geopolitical scenarios that open up - simultaneously push towards a territorialization of the high seas and a maritimeisation of conflicts. In the past, victory in wars were determined by the control of ports, gulfs, straits: that is to say all the maritime spaces bordering the mainland. Thus, in the past, 'conflicts over control of the Mediterranean must be seen as a struggle for dominance over coasts, ports and islands, rather than as battles for supremacy over the open sea' (Abulafia, 2013, p. 16).

Today, this ancient constraint of strategy is transforming dramatically: strategic resources reside in the high seas (i.e. communication systems and the control of raw materials), and route management takes on a much greater importance, considering the continuous evolution of globalization and maritime traffic.

The result of these transformations will be the maritimeisation of conflicts, not only on the surface of the sea, but also in submarine spaces, due to the importance of transmission cables for images and data, another resource of utmost importance in contemporary society.

'In 2017 there are 263 submarine telecommunication cables stretching over one million kilometres through which almost all internet transactions and 95% of global communications and images pass' (Attali, 2017, p. 181). It is no coincidence that the conflicts over the ownership of extraterritorial waters represent some of the events that have emerged in recent years throughout the international chessboard, including the Mediterranean.

The conflicts of the next decades will again see the sea as a protagonist: 'the war at sea is always a dispute that has as its object the lines of maritime communication, ie the routes used for trade, for the projection of power on the territories next to the sea and as a source of profits to be obtained by force or thanks to the protection against the use of force' (Glete, 2010, p. 9-10). Today, the commercial fleets of naval gigantism run for the seas: to protect navigation from piracy, security systems operate silently. In short, the game is becoming increasingly complex: the sea is once again the main protagonist of competitive supremacy among nations, political aggregations, economic actors. In this context, we need to place the Mediterranean in a perspective which, in the alternation of the historical phases, has sometimes been the driving force of transformations whereas, in other moments of time, it took on the role of a secondary theatre of events with focal points located far from our nearest theatre of operations. As stated above, this is the moment when a new opportunity is arising for the Mediterranean, due to a more liquid society, which bases the quality of competitiveness also on connections. Ports are a privileged observatory of these dynamics, as they constitute a connection between territory and horizon. "Observing the Mediterranean from the point of view of a port means scrutinizing it in its nature as a viable space, a territory of exchange not only for goods, but also for culture and society" (Masciopinto, 2016, p. 127).

Every port overlooking the Mare Nostrum feels as if it were in the middle of the Mediterranean. This expression has become a ritual reference, but it risks to lack strategic significance, just as the redesign of international routes and the doubling of the Suez Canal are consolidating the importance of Mediterranean maritime traffic, which currently accounts for over 20% of the total world volume, 25% of container line services, 30% of oil traffic.

"Before the Suez Canal was built, European powers had only conquered coastlines, ports and strategic points along great maritime routes. This canal allowed European vessels to significantly shorten times necessary to reach Asia, since it became unnecessary to circumnavigate Africa. The Mediterranean, which after the discovery of America had lost its commercial importance, was populated by ships again and thus regained its centrality in global trade (Strangio, 2017, p. 16-17).

At the moment, the doubling of the Suez Canal has brought about new opportunities for the Mediterranean to play a crucial role in international maritime trade and

geopolitics, in trade flows and in the future of industry. About 8-10% of the world's maritime traffic passes through Suez.

In the first nine months of 2017, around 668 million tons of goods passed through the canal, with an increase of 9.8% compared to the same period of the previous year. It was precisely due to the construction of the Suez Canal, in the mid-nineteenth century, that the Mediterranean, albeit for a limited time, reacquired an important strategic role.

'A new era was inaugurated for the Mediterranean which, after having been decentralized due to ocean navigation since the sixteenth century, was now returning to the centre of the world. The Suez Canal conferred a new meaning, and finally an important task to the control of the rock of Gibraltar' (Cardini F., 2014, p. 62).

In the future, we will have to face a Mediterranean polycentrism that will be one of the keys to the strategic confrontation between the international economies of our time: the conquest of a Mediterranean centrality will probably remain an Arab Phoenix, dependent more on the legacy of a history where the Med was the major player, and in contrast with the complexity that characterizes contemporary history, characterized by a plurality of architects.

The game played on the Mediterranean chessboard is extremely important. The economic weight of maritime activities generated by the Mediterranean Sea is equal to an annual value of 450 billion dollars, which, compared to the different regional GNP, makes this sector the fifth most important economy in the region after France, Italy, Spain and Turkey: "this value represents about 20% of the world maritime product, in an area that makes up only 1% of the world's oceanic space. Furthermore, the economic assets of the Mediterranean Sea are conservatively estimated at 5.6 trillion dollars "(WWF, 2017, p. 9).

In the generation of gross marine product, Italy is top of the Mediterranean ranking, followed by Spain, France and Turkey. With respect to this indicator, there is no consequential awareness to organise consolidation and development policies that could generate positive results for growth in Italy's production system. The spread of traffic between the countries of the southern shore and the northern shore of the Mediterranean is decreasing, due to the attractiveness and more intense competitiveness of the ports of North Africa.

The Mediterranean is therefore a strategic area of utmost importance: "it is surrounded by 11 European countries, 5 African countries and 5 Asian countries, with a current population of 425 million people" (Attali, 2017, p. 257). There is a lack of national and European strategies and policies for the Mediterranean, which risks to jeopardize not only the record that has been consolidated over time but also the prospects for important opportunities related to the future growth of other regions overlooking the Mare Nostrum.

Nevertheless, "Italy and its Mediterranean can play an increasingly important role in the whole area: it is crucial to start from the data of growing trade flows in the Mediterranean and from the position that can be acquired by the southern ports and the other Italian ports" (De Vincenti, 2018).

Such potential does not become effective from the point of view of competitiveness and the reasons behind this are numerous: as we will see in the next part of our analysis, these partly depend on geopolitical factors and in particular on the underestimation of the Mediterranean in the definition of EU strategies. Another reason is represented by the inadequate offer of port services which appear to be far from the standards of a new and redefined demand.

To sum up, "the Italian Mediterranean and the surrounding areas present themselves and are perceived as problematic and inefficient spaces, marginal to the projects of logistics and incapable of successfully serving nearby markets (the Padan plain, Bavary, Switzerland, Austria and central Europe). On the other hand, ports, logistic and transportation systems in Northern Europe are becoming increasingly competitive" (AA.VV., Europa Mediterraneo. Un'idea di strategia dei trasporti, 2006, p. 16).

This course of events, which has marginalized the connection system in the Mediterranean area, is finally changing. It is becoming more and more obvious that transformations of geostrategic balances require appropriate reorganisations of infrastructures and logistic services in order to support the competitiveness of the manufacturing sector of our country.

"The importance given to the accessibility of the Mediterranean is closely linked to the economic opportunities for our country in terms of commercial exchange and ultimately develops in actions aimed at improving maritime and airborne connections towards the countries of the Med Area" (Finanze, 2018, p. 8).

It is within this framework that we can consider the definition of strategic actions for Southern Italy's ports, currently subject to the deep changes caused by the evolution of traffic within both the Med Area and international maritime flows. We are witnessing great changes linked to processes of concentration of the maritime industry and to transformations of international trade.

The role of Southern Italy's ports in the Mediterranean

The ports of Campania, in particular Naples and Salerno, can be among the protagonists of this opportunity for development, in market segments that are fundamental for the maritime economy: cruises, motorways of the sea, the energy sector, the commercial traffic of containers and various goods. 'In addition to the main commercial ports of the peninsula, some ports defined as 'intermediate' are potential attractors of freight flows, which could play a decisive role in a Euro-Mediterranean model as opposed to a euro-centric one' (Forte, 2017, p. 36).

The Port of Naples



Figure 2 - Source: www.porto.napoli.it

The portuality of southern Italy has recorded, in recent years, the crisis of the ports of pure transshipment, Gioia Tauro and Taranto in particular. The competition of North African ports, that take advantage of many competitive factors (ie low cost of labour and availability of greenfield spaces), the Chinese project of reorganising traffic based on Piraeus, and the crisis of the ports of pure transshipment determine a necessary redesign of Mediterranean port bases. The gateway function is taking a leading role again, bearing out the fact that port systems can be competitive on the condition that they can build a dialogue between the territory behind them and the system of maritime connections.

"In comparison with volumes before the 2009 global financial crisis, Italian gateway ports have performed better than hubs. In 2016, regional and gateway ports showed an increase of volumes amounting to 2.2% on 2007. On the other hand, Italian hubs of transshipment recorded an average decrease of 3% in the period 2007-2016" (De-Martino, 2018, p. 73).

If on the one hand the crisis of transshipment ports (Cagliari, Gioia Tauro and Taranto) produces serious difficulties in a significant portion of Southern Italy's portuality, on the other hand the growth of gateway ports shows an important revival of the relationships between territory, industry and the port system.

"The traffic of Italian port clusters characterized by mainly gateway traffic is growing thanks to a weak economic recovery while the trend of pure transshipment ports in the south continues to be uncertain. In particular, gateway traffic has reached almost 8 million TEU/year, thus overcoming the critical low of 6.1 million TEU/year of 2013. The sector of transshipment suffers from the combined negative effects of a) the difficulties of Gioia Tauro, b) the fall to zero of traffic in Taranto and c) the simultaneous growth of the transshipment share in some gateway ports" (Finanze, 2018, p. 123). Between 2013 and 2017 southern ports of transshipment lost nearly one million TEU/year.

To sum up, one of the functions on which the identity of a significant part of southern Italy's portuality had been based (ie specialization in containerized transshipment) has shown its structural weakness due to several factors: the competition of other Mediterranean ports with a lower cost of labour and the mistake of choosing a strategy based on pure transshipment in a context of redesigned routes where mixed function ports (gateway and transshipment) are generally preferred.

The Mezzogiorno has always suffered with logistic marginalization from supply and end markets. This has been a historical competitive disadvantage that must be overcome in order to revitalize the productivity of the different factors, a strategic element to the enhancement of structural competitiveness in southern regions.

Too often, when we talk about port competitiveness, we refer exclusively to infrastructural adaptation, an issue that is certainly relevant but that alone is not able to make a difference in the logistic improvement that we need: "Infrastructures are not development. It is talent, not cement, that creates development. Infrastructures are not ends in themselves, but are at the service of the country, citizens and businesses" (AA.VV., Connettere l'Italia. Trasporti e logistica per un Paese che cambia, 2018, p. 9).

On this front the ports of the South in their entirety, and the ports of Naples and Salerno in particular, are called to face the challenges of the coming years. Certainly the planned investments will have to be completed to improve the overall quality of port receptivity, but if a qualitative leap in the organization of public and private services is

not taken, it will be very difficult to generate the change of pace necessary to turn the ports from specific structures of interchange between sea and land into a backbone for the overall logistic value at the service of the territory.

The original setup of European port systems represents a key factor to take into account in the future steps needed to transform the role of maritime ports in the development of the economy and territories.

“Ports of the North were born to support the industrial revolution of the manufacturing sector... whereas in Italy the original model is the port-marketplace as defined over the centuries, mainly oriented towards the sea and producing wealth thanks to trade, intermediation and taxes” (AA.VV., *Connettere l'Italia. Trasporti e logistica per un Paese che cambia*, 2018, p. 78-79).

Therefore, a divergence arises in the comparison between ports of Northern and Southern Europe, which is to say industrial and trade ports. It is now time we work to fill this gap if we want to reach a new configuration of the functions performed by the port system in the Mezzogiorno.

To this end, the development of the gateway function in southern ports may allow to strengthen the link between maritime connections and the territorial system, with the aim of boosting industrial recovery through a competitive and efficient system of connections.

The port of Gioia Tauro



Figure 3 - Source: www.portodigioiatauro.it

Playing within the Mediterranean scope means to overcome a short-term vision based on port provincialism that has characterized the maritime economy of our country over the past few decades. Intermodal cooperation and interchange axes must be built and designed to serve the industrial and productive community.

The Adriatic and The Tyrrhenian are the port systems that should build strong Mediterranean relationships, towards the East Med and the West Med respectively. In the perspective of strengthening the railway connection between Naples and Bari, collaboration between the port systems of the Tyrrhenian and Adriatic becomes essential to build a logistic structure able to offer the market an adequate network of efficient connections via collaboration with the shipping companies.

'Italy finds the meaning of its own destiny: it is the median axis of the sea, and it has always been divided, much more than is usually said, between an Italy turned to the West and another that looks to the East.' (Braudel, 2017, p.10). The Mediterranean horizon of our times should encourage our country to mend this mediumness, finding cooperation between the two western and eastern axes, to affirm its own strengthened presence on the Mediterranean chessboard.

Within the future projects of logistic policy in our country, "the maritime-port system has been identified as the pivot to the recovery of the entire logistic and goods transport system" (Finanze, 2018, p. 32). This new awareness makes it possible to devise broader strategies, not enclosed within the scope of ports but embracing the whole value chain of the logistic cycle, within which the port represents strategic and operational centrality.

If we take into account the organization of trade flows of the Italian economy, it is easy to see that these are more significant in directions to/from specific areas of the world. We should consider this alongside the informed predictions that can be elaborated on the next decades when defining a strategic model for Italian logistic policies. The ultimate aim needs to be the pursuit of national interests within the scope of a European position.

"The most significant international trade flows (import+export) take place with the EU28 area (43.3% of exchanges) and in second position we find other European countries (except Turkey) with 14.4%. Therefore, almost 57.7% of international trade to/from Italy is carried out with other European countries while the remaining part occurs with MENA countries (Morocco, Tunisia, Libya, Egypt, Jordan, Israel, Lebanon, Turkey) and the Middle East: 11.9% and 10% respectively. Data regarding the American continent also represent remarkable results with 9%. Trade flows with China, on the other hand, account for 2.2%, a figure that grows to 7% if the whole Asian continent is considered" (Finanze, 2018, p. 106-107).

To sum up, the MENA area represents the second most important market in terms of trade flows for our country while China, notwithstanding the political and media attention it enjoys due to the BRI initiative, currently holds a marginal place. Obviously, this figure is bound to grow in future years but at the moment this is not a key factor to take into account in the design of national strategic plans aimed at pursuing Italy's national interest.

In this context, also the ability to invest in routes of motorways of the sea from the ports of Southern Italy to the ports of the MENA area and of the North African shore becomes a necessary path to offer the manufacturing economy of the southern regions an opportunity to access markets that are due to grow substantially over the next decades.

Nowadays, about 50% of the overall Italian import-export departs from or arrives at a Southern port. This strength needs to be turned into a system and has to be considered a strategic lever of action aimed at strengthening the Mediterranean component, which already represents a significant asset for our economy. In the MENA area Italian exports account for 11.9% of the total while those of Southern Italy account for 15%. This is clearly a significant game worth playing.

In order for this to happen, however, we need not only an awareness of maritime operators but also, and maybe more importantly, some political and institutional initiatives aimed at restoring a more prominent role for Italy and Southern Europe on the Mediterranean chessboard. Furthermore, it is necessary to start from the strengths that have made it possible for our country to hold an advanced position in different market sectors: in particular, Italy handles 36% of the overall volume of Short Sea Shipping in the Mediterranean.

'The short sea sector appears to be a strategic lever for the development of the Italian economy and its Mezzogiorno' (Forte, 2017, p. 25). Instead of continuing on a pointless competitive race with the Northern Range ports of Europe on the deep sea, it is better to enhance an existing specialization, a strength on which to leverage in order to consolidate a maritime leadership.

Choosing an attack strategy to focus on the Mediterranean development of Italy and of the ports of the South is possible on the condition that the competitive framework is clear, setting objectives that are achievable. There are some structural features of the Mediterranean portuality that should not be left out.

'A navigation that for centuries and millennia would be carried out mostly by cabotage, near the coast; making the Mediterranean gradually punctuated with ports, often small, but placed at a day of navigation from each other, to ensure a shelter from storms or the pirates' (Cardini & Vanoli, 2017, p. 14).

This articulated design of Mediterranean portuality, which has resulted in fragmentation and internal competition, weak in the phase of globalization and economies of scale, must now be redesigned according to paradigms that allow to generate a network of maritime and intermodal connections able to support a new economic development of the region.

Unfortunately, so far, this horizon is hard to see, and the Mediterranean is likely to be a transit for traffic directed elsewhere rather than a protagonist and a generator of connections. Mediterranean centrality in the next decades will be gauged by means of an ability to generate connections within the basin which aim to competitively satisfy and support the economic links between the production systems of the Mediterranean shores.

In their recent publication Mario Caligiuri and Andrea Sberze state that 'On paper we are a Mediterranean country. Indeed, the Mediterranean country par excellence. But in fact, the awareness of our Mediterranean centrality, on which the Roman empire was based for centuries and which our maritime republics profited from seems to have disappeared' (Caliguri & Sberze, 2017, p. 11).

Nowadays, ports are reshaping their strategic setup: in the past they used to be enclosed in a certain territory while currently they are part of a wider network of connections, thus being an element of a larger system of relations which contribute to the degree of the overall economic development.

"The emergence of a paradigm shift in the interpretation of competitiveness, no longer only between individual ports but between logistic chains, has contributed to enriching the perspectives and levels of analysis on port competitiveness" (De Martino, 2018, p. VII).

The roles of the various stakeholders operating within the value chains generated by the port system, which has relations with the logistic chain as a whole, assume different objectives and identities, which can find common ground of action, provided that cooperative contexts are developed.

"The aim of the Port Network authority is to attract private investments while supporting the public utility of the port to the local community and reducing negative externalities, whereas private port operators seek to maximize value for the clients in order to increase profits. It is clear that these two concepts of value are often clashing" (De Martino, 2018, p. 27). Reducing the degree of these clashes and generating a shared platform supporting the common good is the difficult mission to be accomplished by public and private players operating in the port system.

In the ports of Napoli and Salerno it will be challenging but nevertheless necessary to find an agreement between the different interests at stake.

These will be tested in the establishment of the Special Economic Zone where the ability to liaise and work together will be crucial to maximize the attractiveness to investments necessary to relaunch the development of the manufacturing, logistic and port sectors of the area.

The Chinese strategic design towards the Mediterranean

We are all fascinated by the tale of the Silk Road which quite openly contains a Chinese hegemonic strategy, not only on maritime routes but also on land. This is being deployed as an instrument for commercial penetration and economic presence mainly through the special economic zones that are spreading across Asian countries.

The history of the world is also built with stories and metaphors. "It was the German traveller Ferdinand von Richthofen who coined the name Seidenstrasse, the Silk Road, with reference to one of the most precious goods exchanged there. In reality, there was no such road but rather quite a vast network of itineraries that stretched from the heart of China through Asia, towards the Mediterranean, with links to cross roads that led north and south" (Cardini & Vanoli, 2017, p. 7-8). This metaphor has today become a fundamental engine for moving global economic balances. For China, the maritime economy is worth \$970 billion annually, accounting for 9.4% of its GDP. Leveraging this power, the maritime system becomes for China the main instrument of international politics, with the aim of gaining greater control over routes, terminals and commercial flows.

The design of political and economic development of the Asian giant is based on three pillars: the Silk Road, for the construction of an axis of land connection to Europe, the logistical presence in the Mediterranean, to make it a gateway to the Balkan and Central European markets, the commercial penetration in Africa, to seize the opportunities for development of the aforementioned continent.

The BRI project (Belt and Road Initiative) is mistakenly considered as reminiscent of historical-romantic memories for Europeans. This initiative is in fact somehow reconnected with Marco Polo's travel to the Far East, which opened avenues for international trade of spices and silk making the maritime powers extremely rich. Nonetheless, an important difference can be spotted in the comparison between the present and the past: the Silk Road has changed its direction. In fact, it was Western countries that travelled eastward in Marco Polo's age, whereas now it's the Far East that is moving westwards.

Another crucial factor is also changing: the speed of implementation and crossing. In contemporary society the pace is faster and the processes of evolution in industrial and logistic organization models follow routes where innovation happens more frequently.

The answers that can be put in place when the times of the changes are so accelerated are extremely difficult for societies, like the European ones, that must respond to complex criteria of democratic public discussion, while the Chinese model today can count on a combination of capitalism and autocracy that manages to be more timely in guiding the transformation paths.

The combination of the aforementioned inverted direction compared to Marco Polo's age and the acceleration in the timeliness of changes leads us to evaluate the BRI with a different view from the one that is publicly shared nowadays and illustrating a game where all the players win. It is not like that, in fact the leader and first ranked is the winner.

The investments already implemented are considerable: "So far, Beijing has poured approximately \$500 bn in the BRI, a figure divided between national institutions like the Silk Road Fund and China Export-Import Bank, alongside new regional institutions like the Asian Infrastructure Investment Bank (AIIB) and lines of credit of Chinese Banks" (Grotti, 2018).

The Asian giant has aggressively appeared on the window of the world, also thanks to a model of economic market leadership to which we were not prepared and accustomed. "China seems to rely more on the liberation of animal spirits than on a state capable of promoting development thanks to a policy of import substitution, but which simultaneously requires entrepreneurs to engage in the global market" (Amatori, 2013, p. 48).

The Belt and Road Project: land and maritime routes

The behavior of the Chinese government in the governance of the economy introduces competitive asymmetries that have led to mechanisms of reaction and protection, which today reach their maturity: "The current frictions on trade are mainly due to two behaviors shown by China that can hardly be considered in line with free trade practices. The first is the remarkable ease in the appropriation of intellectual property. The second phenomenon is that in many sectors China finances the losses of public companies, creating an advantage that makes it impossible for private companies to catch up since they are not subject to the same treatment at home" (Rossi, 2018).

Nevertheless, the strategic framework within which these frictions are inserted is wider.



Figure 4 - Source: SRM

While on the Silk Road the rhetoric of international geopolitics is wasted, the other two front lines of Chinese strategy still remain in the shadow, although they are essential elements in the construction of the new imperial design, which is strongly based on hegemony in controlling routes, terminals and maritime traffic.

With the recent acquisition of the Port of Piraeus, China has made a fundamental move to build a Mediterranean hub, the bridgehead for managing the new Chinese-led Mediterranean centrality. Europe has clumsily allowed this design, by withdrawing its support for Greece at the time of its economic-financial difficulties, and even forcing the Greek government to hand over control of the country's strategic maritime and airport infrastructures.

The Chinese expansionist strategy is also aided by investments in North African ports, with the maritime companies controlled by the Chinese state expanding their scope of influence. In the Chinese strategy towards the Mediterranean there has been a change of pace: 'for this country the Mare Nostrum has shifted from transit sea for the ships to a real permanent logistic platform' (SRM , 2017, p.132).

This is a strategic plan supported by an international policy action: "a fundamental strategic target of Chinese foreign affairs is Africa. In December 2015, a meeting was

held in Johannesburg between China and almost all the African countries where Xi Jinping presented a package of 60 billion dollars for cooperation and development' (Fagan, 2017, p. 117).

Africa and the Mediterranean

Recently, a timid European response came from Germany: the Merkel plan for African development was presented in Berlin on 12 June 2017. This is based on three pillars: economy, trade and employment; peace and security; democracy and respect of law. The operation foresees an allocation of 300 million euros of public development aid to stimulate employment - above all youth - and to reduce criminality in Africa. The resources put in place are not comparable to the deployment of financial resources invested by China, and the political value of Europe as a whole is not made clear.

The Asian colossus is still in the lead, while EU countries are still struggling to give an overall response to the complex Chinese strategy: they proceed in a random order, with an attempt to activate bilateral relations rather than to build a collective response.

The same thing happened during the Libyan crisis, when France and Great Britain worked more to reduce Italian influence in that country than to assert an EU policy direction. Proceeding in loose order, or generating competition within the Union to better control the markets according to the principles of individual nationalities, is the precursor to losing further ground in the international context.

In the meantime, China has invested heavily in the Mediterranean area in recent years, starting from 2015: in addition to the acquisition of Piraeus, 'the shareholdings in Port Said and Alexandria (Egypt) and in Kumport (Turkey) fall within the same action plan' (SRM, 2017, p.53).

Control of the Haifa terminal in Israel and Vado Ligure are also part of this plan. If we then add minority holdings in the Khalifa Port Container Terminal 2 (UAE) and in the Suez Canal Container Terminal, the picture is complete.

Obviously, these elements cannot be attributed to randomness: these strategies represent not only the desire to build direct ways to control the Mediterranean traffic, but also outposts to exploit the future potential deriving from the growth of African countries. It would be a mistake to read the African countries overlooking the Mediterranean as an indistinct mass of homogeneous realities. The situation of the weaker economies of the Maghreb countries, still undergoing a demographic transition and with a composition by age of the population in which young classes prevail, contrasts with the advanced economies of the North Bank, which show phenomena of demographic regression and an aging population (ISSM-CNR, 2017).

‘Seven out of the top ten fastest growing economies are already operating in Africa and in particular in the Sub-Saharan area. Important and modern energy projects are being developed and revolutionary urban areas are being designed (i.e. the Tech-City of Konza in Kenya)’ (SRM, 2017, p. 37).

Also in terms of Foreign Direct Investments Africa is playing a key role, of which some clear signals can be recognised: ‘In 2015 Africa received seven hundred and five FDIs amounting to \$54 billion, 15% of the world total’ (SRM, 2017, p. 38).

At the same time, in the Middle East and North Africa (MENA), Italy recorded an increase in foreign direct investment: between 2010 and 2015 they tripled in Algeria and the Emirates, doubling in Egypt. It is precisely the companies that are the potential of our country's roots in this geographic chessboard, provided that the logistics are able to ensure greater competitiveness.

The MENA area

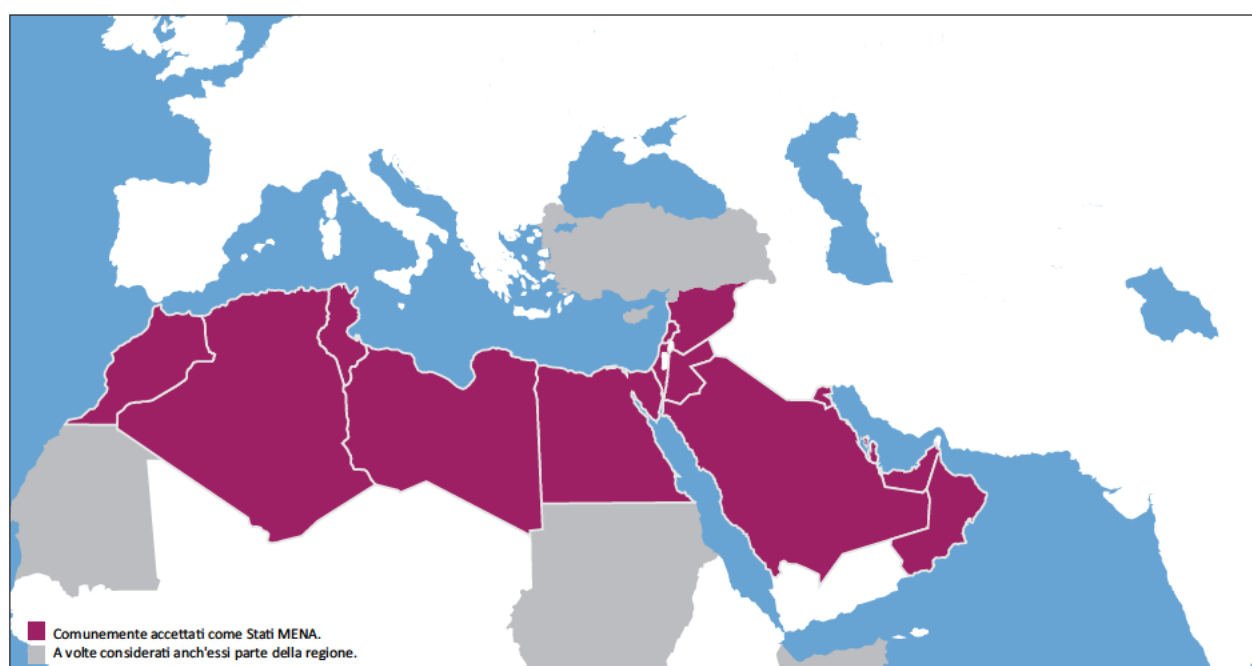


Figure 5 - Source: Wikipedia

China is also increasing its commercial presence in the Mediterranean area: in the MENA area, Chinese trade has increased from \$16.2 billion in 2001 to \$185.6 billion in 2015, with estimates predicting a growth that will reach \$203 billion.

Italy recorded an unbalanced maritime trade with China in 2016: it imports €20.7 billion, and exports €7. The basic foundations of the Silk Road for our country lie above all in balancing these numbers, which determine an inevitably negative situation for our trade balance, considering above all that China, with the One Belt One Road

initiative intends to increase the importance of its commercial penetration, until reaching the goal of exporting goods and services amounting to about \$ 700 billion and importing \$ 573.6 billion.

We still consider China to be a primary producer of low quality products, and of the basic industry, which in the past decades was far behind the strong economies of the world. This paradigm is changing rapidly, with China now presenting itself as a protagonist of the cultural and high technology industries. This is the point of view from which we should read the new role that the Chinese colossus will intend and be able to play in the Mediterranean and in North Africa.

The lack of European policies for the Mediterranean

Europe is the stone guest in this great game. So far, the EU portuality game has been characterised by a contrast between the Northern Range and the Mediterranean ports, in the scope of the competition to attract traffic directed to the European market. It is necessary to highlight that 'in the EU at the beginning of our century the centre of gravity of Europe is still located in the north' (Abulafia, 2013, p. 606).

Nevertheless, while the Northern European port system does not have any extra-Community competitors in serving our markets, the ports of the southern EU shore suffer the competition that comes from the North-African shore. The Mediterranean strategy of the European Union has struggled to establish itself. Only recently are we beginning to draw institutional cooperation and intervention paths that seek to remedy the gap filled by the Chinese hegemonic design. A change is finally taking place. On 30th November 2017, in Naples, a declaration was signed for the partnership between the European Commission and the Mediterranean Union signed by the Ministers of Maritime Affairs of the ten states participating in the initiative for the sustainable development of the blue economy of the Western Mediterranean (Algeria, France, Italy, Libya, Malta, Mauritania, Morocco, Portugal, Spain, Tunisia).

The 'initiative for the sustainable development of the blue economy of the Western Mediterranean' was approved on 19th April 2017 by the European Commission setting itself the following goals:

1. A safer and more secure maritime space.
2. The promotion of smart and resilient growth of the blue economy and employment.

3. The preservation of the ecosystem and biodiversity of the Western Mediterranean.

These objectives need concrete means to be achieved: on the one hand, we need infrastructural funding for the strengthening of networks and technologies and on the other we need to increase our maritime connections.

So far, the flows have mainly concerned the tragic phenomenon of migration from Africa to Europe, and the encounters are more connected to the terrible events of Islamic terrorism that undermines security. 'The Mediterranean is now a word that is scary, that divides us and outrages us. Its millennial history does not seem to matter anymore: we only see the desperate people who drown every day, the economic crisis that for years has been going through it like a storm, the madmen and the murderers who covered its coasts with blood' (Vanoli, 2015, p.8).

If approaches related to fear and closure prevail in interpreting social phenomena that must instead be governed and managed, the Mediterranean loses its horizon and loses its opportunity. Economic protectionism, which stands out on the horizon, risks being affected by social protectionism.

While terrorism must be fought with the weapons of international cooperation, in regards to demographic dynamics we are in the presence of irreversible phenomena. 'Africa is still a continent out of control: if in 2015, with 1.2 billion people, it represented 16% of the world's population, in 2050 it will have 2.5 billion men and women, almost 26% of the world's population, and in 2100 could reach 4.5 billion, 40% of the total' (Giovannini, 2017, p.10).

Not detecting these phenomena of a demographic nature which were bound to completely change the nature of social relations, has been a strategic error for Europe. So, we decided to focus exclusively on fuelling people's fears without leading a process of transformation. 'The Mediterranean is an area of intense debate and reflection in the contemporary geopolitical scenario; a public space able to unveil the limits and criticality of political and institutional actions on a fragmented and incoherent territory where beautiful images of the coasts, the sea and the beautiful landscapes contrast with those of the boats loaded with migrants and the corpses that float on the shore and lie on the beach' (Masciopinto, 2016, p. 128).

And yet, as often happens when phenomena of a strongly discontinuous nature have occurred throughout history, they can be looked at according to perspectives of risk or opportunity: knowing how to turn potential risks into opportunities becomes the decisive strategic advantage factor in international competition. As Constantine Kavafis wrote in one of his poems (Waiting for the Barbarians): 'Now what's going to happen to us without barbarians? Those people were a kind of solution'.

After all, the United States of America have built their power and economic growth precisely on the capacity to welcome immigration.

Europe has instead decided to leave the initiative to the others in this game therefore fostering an unconscious fear of 'the other' that is polarizing consensus towards populist options of protectionism. That risk which some time ago was called 'fortress Europe' is becoming real and is completely transforming the original meaning of 'Europe'.

From Africa, very large migratory flows will be generated, especially towards Europe, due to both climatic factors and political upheaval (Giovannini, 2017, p. 11). Little has been done to integrate freight and passenger traffic between the two shores of the Mediterranean commercially. North Africa is a frontier of development which is the main opportunity not only for Southern Europe but also for the whole of the EU.

The route between Shanghai and Naples takes 21 days of navigation, while that between Tunis and Naples only 15 hours. Time remains a strategic variable of competition. Moreover, the variable geometry of globalization will shift the frontier of the future to Africa. If we are able to understand and direct this challenge, using the Mediterranean as a strategic axis, we will be in the position to change the destiny of southern Europe, and of our Southern Italy.

Even before the African opportunity, which nevertheless requires a strategic vision in the long run, the world will have to face the challenge of post-war reconstruction in areas that were devastated by conflicts in the past decades and currently in Syria: "In the very long run, Africa will be what the reconstruction of Libya and Mesopotamia will be in the near future" (Sapelli, 2018, p. 57).

The area immediately surrounding our territory will witness revolutionary events that will change the configuration of what we are and of what we will be. Should we fail to get involved in dealing with these phenomena, others will do it instead of us, which will result in a subordinate position of Europe, Italy and the Mezzogiorno.

The Mediterranean already plays an important role in the structure of economic exchanges for our Mezzogiorno. The area shows, even between political crises and social conflicts, a growth potential that deserves attention. The countries of the Middle East and North Africa grew, in the period 1995-2016, an average of 4.4%, which is significantly higher than the rate of the EU-28 (1.9%). Turkey recorded the highest value (4.9% per annum). The population of the area will reach 730 million inhabitants in 2050, with a growth rate that is less marked than that of GDP.

'Trade between Southern Italy and the countries of the MENA area amounted to € 13.6 billion in 2016, a much lower value than that recorded by the North-West (€ 25.3 billion). In 2001 trade between the Mezzogiorno and the MENA area amounted to € 14.6 billion. The 2009 crisis caused a sharp decline in trade' (SRM, 2017, p. 33).

For Southern Italy, trade with the MENA area accounts for 15.7% of global foreign trade: this figure reached its peak in 2005 (26.7%), while from 2012 to 2016 it fell constantly, with a trend that should reverse over the next few years (SRM, 2017).

We can build an intensification of trade and maritime relations between southern regions of our country and the Mediterranean region, with two main aims: a) consolidating the recovery of the manufacturing industry in Southern Italy and b) adding further competitiveness to the maritime economy of the Mezzogiorno.

Factor productivity is generated by better use of labour and capital. Too often we focus on work performance, while we are distracted by capital optimization. The rotation of ships on the short-range in the Mediterranean arch can generate an unparalleled intensity of connections compared to the long routes of globalization between Asia and Europe.

Development is close to us, and the best use of capital can make it even more intense, through a net of connections that enhances the Mediterranean trade. In the age of the new globalization, long trans-oceanic networks can be connected to short-distance networks, which can make it possible to boost economies that are still not influenced by the logic of economic growth based on high-tech industries. We will need fewer and fewer arms and more and more brain to produce value.

Finally, development flourishes wherever we can generate “innovative ecosystems” with a cross-sector scope compared to traditional goods segments. The industrial grammar to which we had become accustomed tends to be contaminated with a new language based on a more complex alphabet: boundaries are constantly questioned according to the paradigm of value creation and constellation (Onida, 2017).

The potential role of Special Economic Zones

This is the strategic front on which one of the most delicate axes of geopolitics will be played in the coming decades. The development of ports in the countries of the northern shores of the Mediterranean is primarily based on the ability to be protagonists of the flows of passengers and goods in the area. In this context, Naples and Salerno have excellent potential. Furthermore, the establishment of the special economic zone, which cannot be postponed for too long, represents a differential advantage from which we need to profit.

Thanks to the Special Economic Zone, “the port can extend the reach of its influence beyond the traditional boundaries and towards the inland areas, thus including activities, resources and players of the regional economic system” (DeMartino, 2018, p. 37).

Through manufacturing investments in ports and dry-port areas aimed at optimizing logistic costs, SEZs are one of the critical variables to generate competitive advantages in comparison with international competition and to restart the production machine, after the long crisis that began in 2007. It was precisely special economic zones that represented one of the elements of positive innovation in the Mediterranean area (i.e. the cases of Tanger Med in Morocco and Port Said in Egypt).

Over the last few years, the development of Special Economic Zones has followed a rocketing trend: their actual number is 4,500 in 135 countries. While Asia has been the main protagonist in the increased spread of this tool of industrial and territorial policy, it is also true that nowadays Europe and the Mediterranean area are realizing that attracting investments in competitive territorial containers represents a good opportunity to boost economic growth.

The development of Special Economic Zones in the world

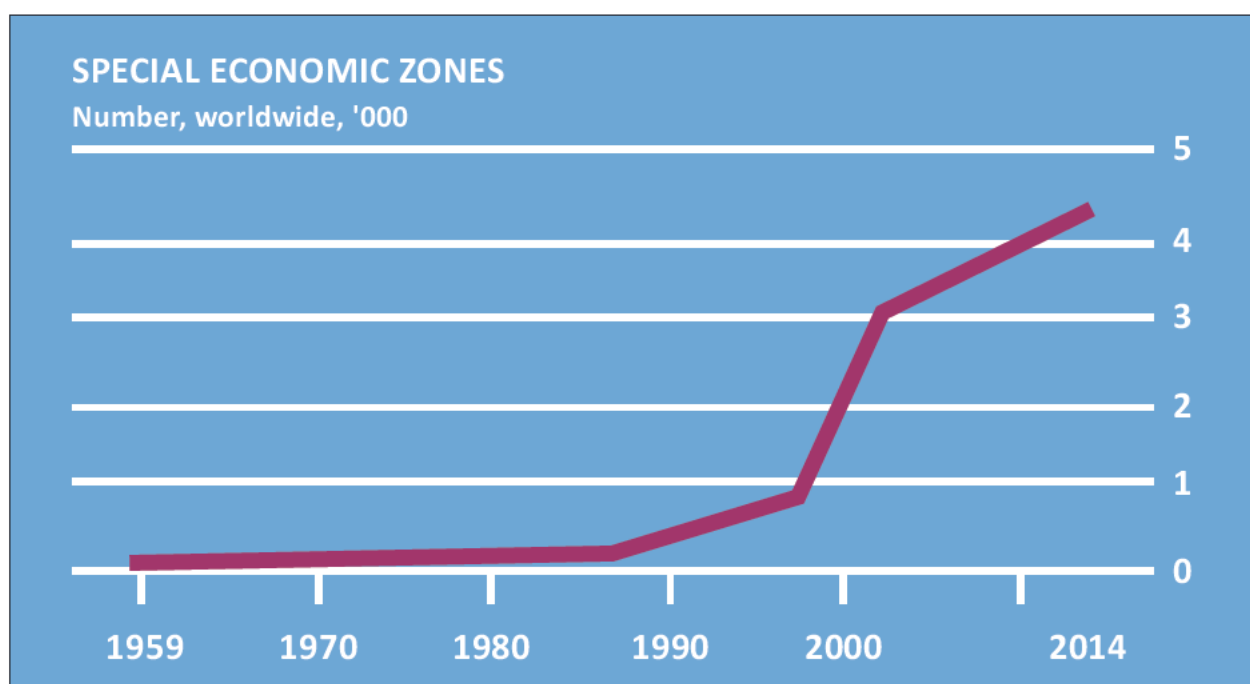


Figure 6 - Source: Economist.it

The ability to generate supply chain relationships among dimensionally different companies is also very important: "the attraction of larger, national and foreign companies, potentially interested in the best conditions offered by the SEZ can determine

the construction of supply chains rooted in the territory which can foster the growth of small and medium-sized southern companies, encouraging the shift towards activities with a high technological content "(Servidio & Prezioso, 2018, p. 148).

It is necessary "not to make the mistake of considering the SEZ the remedy of all the evils of growth. This in fact is only the hammer of a toolbox that must also contain solid nails (the companies), the anvil (an efficient and effective port with excellent terminal operators and inter-ports and / or well-structured dry-port areas), the wrench (a solid bureaucratic system), lubricating oil (a first-class logistic system), a screwdriver (the incentive system) and the pincer (the support of the institutions). These are the tools that must be run together in order to be able to assert the Special Economic Zone in the reference area "(SRM, 2017, pp. 145-146).

Industrial policy, logistics and port systems are a triangle within which the competitive set-ups of the commercial scenario will be established for the coming decades. If, until now, the total productivity of the factors has been played mainly on capital and labour, today it is much more important to consider the "residual" value that represented the "black box" which economists have long been discussing for decades.

The models of production have changed accordingly to pursue the aim of internationalization of the industrial cycle: "for many years we have been talking about unbundling within the international organisation of labour by processing stages. The weight of intermediate products on world trade, even net of agricultural and extractive raw materials (intermediate inputs), has exceeded a third of world trade for many years" (Onida, 2017, p. 26).

The manufacturing hinterland is the backbone that establishes the attractiveness of port systems. The border between logistics and manufacturing becomes much more permeable, as the strategic match in the big economic areas moves on the ability to combine these factors. Also, in the Mediterranean we will see an overall review of competitive balances. Moreover, the fault between Southern Europe and Africa will be one of the battlegrounds from which the future of the international economy will emerge in the coming decades.

In this delicate interstice, axioms must be brought into question that take into due account the transformations that have been determined by the effects of globalization. The boundary between manufacturing and logistics has been attenuating, and the value chains are generated according to patterns of operation that cannot be interpreted with the logic of the past: as Adriano Giannola writes, "the meridionalist thinking on the economy of Southern Italy, so rich of contributions, has neglected the driving force that maritime economy can have to employment and development. Logistic innovation of industrial processes and the renewed portuality will have to contribute to the recovery of the South in a new vision of the industry no longer linked to simple

industrial plants but to the mobility of inputs and the generation of value in the import-export flows managed in specific areas dedicated to dry-port operations, such as distri-parks, logistic poles and districts' (Forte, 2017, p. 22).

The centrality of logistics is a platform of competitiveness that is still underestimated in the definition of the intervention axes aimed at redesigning the factors of competitiveness, both on the microeconomic front of companies as well as on the macroeconomic front of production systems: 'Generating policies to improve logistic competitiveness is one of the decisive factors of a new industrial policy' (Spirito, 2018, p.147).

The competitiveness of industrial economies in our time is played on a network of relationships that are above all outside the factory fence. This results in the need for the toolbox of economic policy to be updated, to touch the right keys capable of creating impulses and incentives in the correct direction. The most modern vision of industrial policy underlines the importance of tools and public initiatives that promote external economies (spillovers) of information and interconnection within different innovative ecosystems located on the territory, but with long interconnection networks that exceed the territorial limits of the old industrial districts (Onida, 2017, p. IX).

Special economic zones are an institutional container particularly suited to mix manufacturing, port and logistics: the boundaries to which we were accustomed between activities are being redefined in a much more liquid logic of network and connectivity. It becomes increasingly necessary to establish the conditions for a horizontality of actions, compared to a traditional approach that favored verticality.

Until now, the rhetoric of the geographical and positional advantage of Italy has been preferred to the implementation of policies and interventions able to make the difference in the choices of operators and the market. "Paradoxically, despite the position of Italy and its Mezzogiorno in the Mediterranean undoubtedly being an important asset, such as to make it the crossroads of a very high number of commercial exchanges, Italy loses on logistics" (Forte, 2017, p. 60).

A global vision of the special economic zones will be necessary, and they will have to be considered not as closed enclosures to favor the maintenance and development of the existing industrial offer, but rather as an opportunity to open the southern window to global manufacturing dynamics: even today in Italy "foreign multinationals account for over a quarter of domestic exports of goods, almost half of imports, almost a quarter of private spending on research and development" (Onida, 2017, p. 70).

Also in terms of approach to managerial culture, the contribution of multinationals can be crucial in order to overcome short-sighted or local visions, since the majority of southern industries are small or medium and mostly family run.

Without a qualification of the logistic offer, intermodality, interconnections and network and system effects, the Mezzogiorno risks missing out on another opportunity for its own development, this time creating not only a disadvantage for itself but a detrimental effect for the entire economy of our country. The Mezzogiorno of Italy is joined by the other 'Mezzogiornos' of the Mediterranean, which can be a system constraint or, instead, an opportunity for development. So far "the Euro-Mediterranean space has not yet become reality. The Mare Nostrum is dominated by the immense problem of the South" (Cardini F., 2014, p. 98).

The crisis that started in 2007 has exacerbated the difficulties and has widened the gap between North and South, due to a dramatic decline in investments. However, it is not all gloom, so much so that since 2015 some signs of a Southern recovery have timidly risen on the horizon: "In recent years, the ability to be resilient has been clearly visible in some companies in the South, which have used many of the tax incentives made available by the government, investing in new products, new machinery and sophisticated services that were competitive on national and international markets" (Lagravinese, 2018, p.47). Supporting the competitive recovery of the existing manufacturing fabric and expanding the production base are the main challenges for restarting southern development: from this point of view, connection services and outlets to international markets are major levers, especially in the economic region closer to our maritime borders.

There is no desert around us. Among the companies that recorded a growth in sales and employment of more than 20% for a period of three consecutive years, the province of Milan leads the ranking with 109 companies, followed by the province of Naples with as many as 64 companies (Lagravinese, 2018). According to the latest Censis-Confcooperative report, in Campania digital companies have grown three times more than in Piedmont. Ten percentage points behind we find Veneto, Tuscany, Emilia Romagna and Lombardy. Between 2011 and 2017, the most significant growth of digital companies was recorded in Campania, with 26.3%, immediately followed by Sicily with 25.3% and Puglia with 24.2%.

Also, there is still a medium and large enterprise fabric that must be considered strategic to organise a manufacturing renaissance of the southern regions. If we look at the territory of Campania, the sectors in which there are dimensionally relevant companies are: automotive, pharmaceutical, aerospace, the canning industry, bakery products. There are 14 companies with more than 500 employees in Campania, and 5 of these exceed 1,000 workers (Ramazzotti & Pirro, 2018).

In short, "the South is far from being an industrial desert; it has a product of capacity, of manufacturing added value of 27 billion.

If we looked at the South as if it were a State, this added value of manufacturing, not of GDP, would place it between Finland and Norway "(Deandreis, 2018, p.101).

These signs of vitality and industrial persistence should be put in the perspective of a strategy and in an international approach, taking into account the markets with the greatest growth potential in the coming years and decades. We must understand that the Mediterranean challenge concerns Italy and Europe at least as much as our southern regions.

The attractiveness of manufacturing investments and the ability to generate value from the logistics economy in the coming decades also depend on the strength and clarity with which the strategic games will be played on the Mediterranean chessboard. China has already begun to move its pieces. Europe and Italy are still struggling to make their opening move.

There is not much time left to avoid crying over the spilt milk. Structuring a strategic design requires cohesive strength, availability of resources and implementation time. Timeliness in the execution of these phases represents one of the elements that will influence the results of the competitive confrontation between the great economic blocs of the world.

Within this overall framework, national and territorial institutions must make their moves consistently, with the ability to build a careful and smart management of all the components that affect international positioning: business, finance, bureaucracy, foreign policy, economic and social forces. In the contemporary world, only team games can achieve ambitious goals.

Ports will have to gain the ability to see themselves as a network of players that co-produce value by promoting different interdependencies between offer chains. In reality, the port is involved in several supply chains (each one characterized by specific value to the consumer) and at the same time the offer of services along a specific chain is generated by different port operators pursuing a common strategy to fulfill a client's particular needs" (De Martino, 2018, p. 31).

The Mediterranean perspective of the Mezzogiorno

The Mediterranean, which has long been the cradle of civilization and also of economic development, can be re-implemented provided that the connections between its regions are effective: "The decadence, crises and illnesses of the Mediterranean coincide with the failures, inadequacies and fractures of the circulation system that crosses it and surrounds it, and that for centuries had placed it above itself" (Braudel, 2017, page 56).

The integration of this cultural, social and economic space depends on a development project that is able to weaken the fractures that risk tearing the elements of potential cooperation: 'The Mediterranean is a space for relations between countries that present strong differentials of growth, economic development and democracy. Therefore, like in a microcosm, the Mediterranean region reflects all the great challenges of the new millennium: population growth, unemployment, migration, reform of welfare policies, poverty contrast, effects of climate change on development, management of the conflicts for the control of natural resources' (ISSM-CNR, 2017, p. 28).

That the destiny of the Mediterranean is that of a new centrality and a consolidated development is not certain. Many even think the opposite. 'This is no longer a sea for dreams and adventures. It is now a sea of exiles, refugees, oilmen, last minute cruisers, smugglers, bloodthirsty madmen' (Vanoli, 2015, pp. 195-196).

Yet, this is not necessarily the case and much will depend on the resumption of a political and economic initiative to design a Mediterranean scenario of integration and cooperation between Europe and North Africa. It will be decisive not to be subject to the initiative of China, which is positioning itself in the Mediterranean to establish a bridgehead towards Central Europe and North Africa. We cannot stand by: we need an initiative capable of mobilizing institutional, economic and social forces.

Italian ports will play a positive and proactive role, as links between territories and the sea, as well as generators of connections. The ports of Campania are in a position to be primary actors in a path of proposals, if they are able to utilise the advantage card of the special economic zone not only as an attractor of productive investments, but also as a mechanism to build a network of links with the Mediterranean economies.

'The ports of the South have a natural attraction factor that is their strategic position that avoids deviations of routes but the intermodal aspect needs to be improved. In particular, the lines Naples-Salerno on the Tyrrhenian and Bari-Taranto on the Adriatic can become the logistic base for the whole of Italian industry up to the Po Valley' (SRM, 2017, p. 117).

The Mediterranean scope of our productive development represents a possible platform for sustainable growth in a global framework which offers a significant share of maritime routes and a strategic potential for economic growth. Nothing is certain without actions of industrial and logistic strengthening of the territory.

We could be passive spectators of the transformations awaiting us or we could be protagonists of the changes that will take place. The borders of development are constantly being reshaped. Only those who can export knowledge and quality will be able to attract value.

After a long economic crisis that caused a more marked strategic weakness in southern regions, we are finally witnessing some encouraging signs deriving from industrial capacities and professional competences rooted in the Mezzogiorno. Portuality can be one of the elements that encourages openness and generates maritime connections while also offering opportunities for a logistic improvement that will benefit all the companies of the area.

Over the last difficult years, Campania has proven to undoubtedly be the 'most resilient region of the Mezzogiorno' (Lagravinese, 2018, p. 49). This trait needs to be consolidated and made structurally solid in order to build a bridge between the Mezzogiorno and the Mediterranean which might become one of the axes to rethink the industrial and logistic future of Europe. If supported by institutions, the territory and the economic and social forces, the ports of Naples and Salerno will be able to play the role of catalyst for sustainable growth.

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