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THE MEDITERRANEAN BETWEEN CENTRALITY AND RESILIENCE

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Abstract: The relevance of the Mediterranean in the panorama of global flows of goods is a consolidated historical-economic constant. The opening of Suez has transformed it from a formidable interface between culturally, economically, and politically different shores to a global crossroads of maritime routes and geo-economic and geopolitical interests, which have reshaped its roles and vocations. One of these, the "mid-oceanic" label, is (perhaps too) frequently attached to the Mediterranean, almost as if to imply that the fortunes of "our sea" are inexorably linked to those of the other seas (i.e., oceans) and that, after all, any success of southern Europe and northern Africa is governed by external actors. It seems the centrality of the Mediterranean and its peninsulas, first and foremost the Italian one, only makes sense as points of passage.

Keywords: The Mediterranean, maritime traffic, Europe, shipping, resilience.

Introduction:A destiny of middle lands and inland seas

G. Fioravanzo (1936) identified the *Latin*, *Australasian*, *American*, and *Japanese* Mediterranean seas as maritime areas in which political, economic, cultural, and strategic dynamics coexisted, capable of nurturing relational processes. Two of these, the American and Latin, acquired their (also) mid-oceanic vocation (and thus centrality) thanks to the construction of two artificial works, the Panama and the Suez canals, respectively. The Australasian one and the Japanese one in contemporary times have been able to enjoy a clear centrality as a consequence of their amount of traffic, especially containers.

In all cases, the maritime trades that have unravelled both in the past and in contemporary times have played a fundamental role in the processes of territorial development, giving certain coastal areas a variable geopolitical centrality depending on their ability to attract traffic, economic interests, and foreign investment. Multiscale centralities, taking up the definitions of Fleming and Hayouth (1994) and Wang and Cullinane (2016), i.e., relating to individual ports, port systems, or entire maritime regions, and Vallega's numerous writings on the sea, have often reminded us that the geographic-economic centrality of ports and maritime systems is closely related to geopolitical centrality and that transport geography and geopolitics are, in themselves, two sides of the same coin: that of global trade flows and their different types. The latter results from the progressive international division of labour and the creation of supply chains that are increasingly complex in their functioning and subject to geopolitical determinants. The hierarchization of the oceans could not, however, disregard the role of "maritime intermediation" played by "Mediterranean" actors: from both a geopolitical and a geo-economic standpoint, the latter assumes a relational and spatial dimension far removed from oceanic supremacy and the subordination of the inland seas (Vallega, 1997).

The Genoese geographer, echoing the observations of the French Vigariè, highlighted how the evolution of maritime transport and of its "actors" at sea (ships) and on land (ports) were actually components of a more complex system formed by the interaction between the *maritime horizon* and the *terrestrial horizon*. Geopolitical action had to be conducted by the state, or by other actors, in such a way as to favour the optimisation of this relationship in favour of a hinterland that had to go as far inland as possible.

The centrality of the Mediterranean was relevant in the *neo-industrial stage* (1900–1970), especially in the phase following the Second World War. Maritime traffic underwent a major transformation that stemmed from the flow of raw materials, especially oil. Maritime traffic was affected, as never before, by the passage through areas sensitive to geopolitical events (the Middle East straits and the Suez Canal). Economic geography could detect new coastal industrial developments concentrated in or close to port areas, in deference to Alfred Weber's localisation theories on the point of minimum transport cost (Cerreti et al., 2019). It was at this stage that "oceanic" power began to be joined by "mediterranean" power: ports on the northern shore were increasingly becoming ideal docking points for oil tankers from Suez.

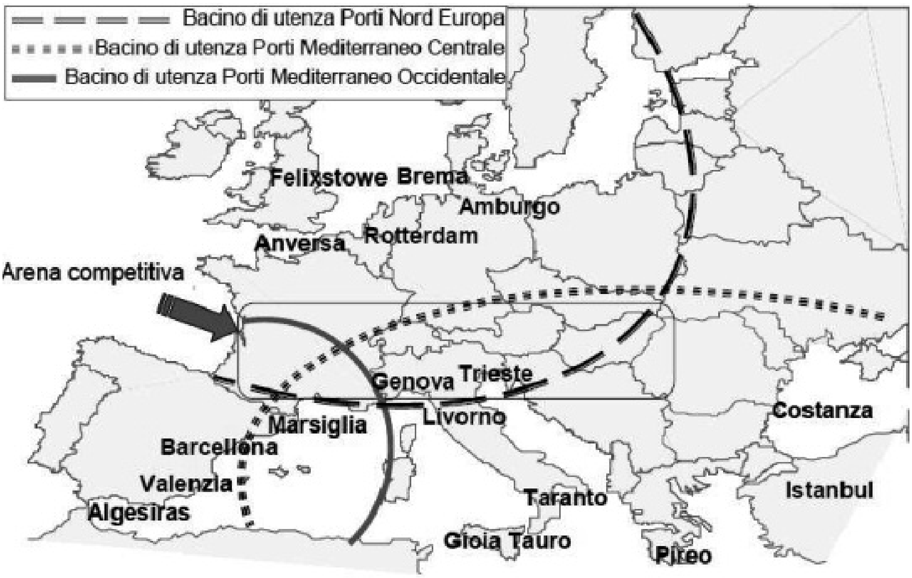
In addition to its centrality, the industrial phase also revealed some vulnerabilities. The Suez closures in 1956-57 and between 1967 and 1975, coinciding with the Arab–Israeli wars, sanctioned the redirection of maritime traffic along the Cape route. Global flows across the Mediterranean resumed with great vigour after 1980, both because of the stabilisation of relations between Egypt and Israel and the vigour with which containerised goods transport began to take its place alongside traditional commodities transport, making the route between the Far East, Suez, and Europe take on the role of "organising principle" of world maritime transport. In the 1990s, the dominant routes were used by so-called *round-the-world* ships, in which Mediterranean actors played important transit roles thanks to the Suez and Panama Canals. The container ships sailed around the world, touching ports in the Asian Seas (China Sea and Japan), Latin America, and the Americas, completing the route to Asia via the Pacific. A system that optimised the filling level of ships called at a few hub ports capable of receiving and, at the same time, replenishing large quantities of goods destined for the three main geo-economic and geopolitical "poles" of the post-bipolar world: East Asia, Europe, and the United States.

The Latin region represented a weak link in the chain due to the well-known infrastructural deficits from which it suffered at least until the first decade of the 21st century. Deficits that complicated the realisation of that land-sea interface desired by Vallega in the European context placed the Mediterranean in a relegated position compared to the Northern-range ports.

On the other hand, the massive use of containers required radically new land-sea interfaces and reduced industrial space in ports in favour of infrastructural interconnections and space for logistics. What became decisive for a port and the entire maritime transport chain was the efficiency of land-based work and the speed of transferring goods to their final destination through intermodal systems. Flat, equipped, and connected areas had an undeniable competitive advantage that established a natural hierarchy based on deterministic factors. Even today, northern European ports are preferred due to the existence of numerous inland waterways (rivers and artificial canals). Mediterranean ports, on the other hand, are subject to orographic constraints that have proven to be highly critical at a time when maritime transport needed perfect interoperability with land transport.

Therefore, for the Mediterranean, the last decade of the last century was one of the most critical periods in recent history. The inability to intercept the flow of goods from the East to the more efficient Northern Range ports became almost structural. The better infrastructure of the Northern European ports made them preferred for import and export activities even compared to areas close to the Mediterranean itself. The location advantage of the proximity of the Suez-Gibraltar route was almost cancelled out by the inefficiencies in terms of handling and bureaucratic burden. The studies conducted by T. Notteboom (2012) and Isfort (2011) showed how the hinterland of the ports of Rotterdam and Antwerp stretched as far as the entire Po Valley, relegating the Ligurian ports to landing points mostly for raw materials and low value-added goods (Fig. 1).

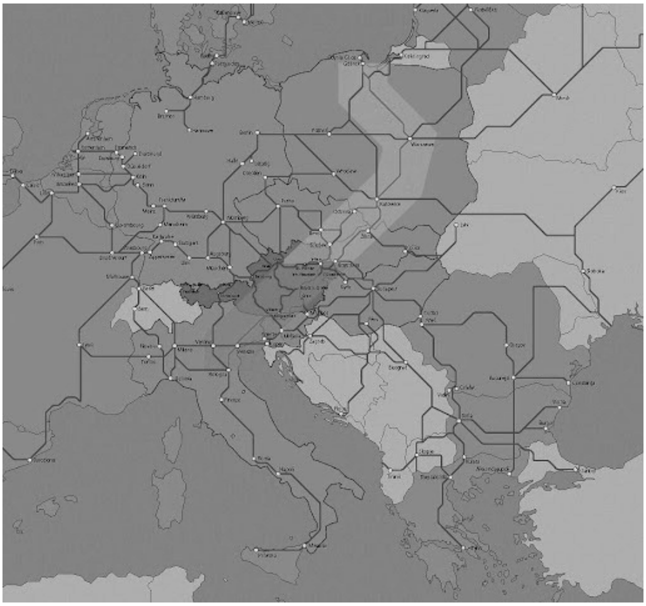
Figure 1: European port influence areas, 2011



Source: ISFORT, 2011

The opening up of Eastern European markets, following the enlargement of the European Union in 2004, seemed to be able to give, especially to North Adriatic ports, new opportunities for growth thanks to their geographical proximity to the new Central European logistics areas and thanks to hypotheses for the development of multimodal corridors, such as the Baltic-Adriatic one, potentially capable of creating a maritime-port macro-system innervated by a rail *landbridge* between Trieste and Gdansk.

Figure 2: The Baltic-Adriatic Corridor



Source: Sellari, 2013.

At the same time, competition within the *mare nostrum* was fuelled by ports on the southern shore, such as Port Said and Tangier, which could count on Asian investments and labour costs at much lower levels than those on the northern shore. The consolidated port hierarchies within the basin appeared to be changing, almost defining a sort of "upside-down Mediterranean" (Sellari, 2013).

In decades at the turn of the 21st century, when, as we have seen, the Mediterranean seemed destined for inexorable decline, the trend appeared to reverse. The Spanish hub ports of Valencia, Barcelona, and Algeciras, the Italian port of Gioia Tauro, the Maltese port of Marsaxlokk, Piraeus, Ambarli, Port Said, and Tangier became important pivots in the strategies of shipping companies in *transhipment* operations.

However, although this type of traffic has allowed the Mediterranean to achieve significant results compared to its North Sea rivals (see Table 1), it should be noted that the added value of traditional ports is about six times higher than that of a transhipment port. Moreover, ports with a high transhipment share are particularly vulnerable, as transhipment flows are highly contestable due to imitation processes of easily replicable activities and the ease of entry by new actors into the market, disconnected from the territorial context (Rodrigue and Notteboom, 2015). The demand that sustains gateway ports is linked to associated logistics services that are much more complex and integrated with the territory of reference, with which the ports themselves have developed links throughout history that go well beyond simple financial investment by foreign entities.

Table 1: Traffic trends 1994-2021 Northern Range and Mediterranean ports (Teu's)

	1994	2000	2005	2010	2015	2017	2019	2020	2021
Northern range									
Rotterdam	4.534.253	6.274.556	9.288.000	11.147.573	12.234.535	13.734.334	14.810.104	14.349.446	15.300.000
Anversa	2.208.173	4.082.334	6.488.029	8.468.476	9.653.511	10.450.898	11.860.204	12.023.000	12.020.000
Brema	2.725.718	2.736.741	3.736.000	488.655	5.546.657	5.513.802	4.857.000	4.771.000	5.019.000
Amburgo	1.480.030	4.248.247	8.088.000	7.895.736	8.821.481	8.815.469	8.257.683	8.540.000	8.715.000
Le Havre	872.939	1.464.901	2.119.000	2.358.077	2.559.410	2.875.281	2.786.000	2.445.000	3.070.000
Zeebrugge	609.600	965.435	1.408.000	2.499.756	1.568.938	1.520.406	1.700.000	1.800.000	2.205.547
Mediterraneo									
Valencia	466.869	1.308.010	2.397.915	4.206.937	4.615.196	4.832.156	5.440.000	5.430.000	5.614.454
Algeciras	1.003.528	2.009.122	3.179.614	2.806.884	4.515.768	4.380.849	5.120.000	5.110.000	4.796.000
Pireo	516.669	1.161.099	1.394.512	885.155	3.327.778	4.060.000	5.650.000	5.437.477	5.320.000
Marsaxlokk	383.060	1.033.052	1.321.000	2.370.729	3.064.000	3.150.000	2.720.000	2.400.000	2.970.000
Barcellona	605.356	1.387.392	2.078.329	1.931.033	1.965.241	3.006.872	3.324.650	2.958.040	3.530.814
Genova	512.098	1.500.632	1.624.964	1.758.858	2.242.902	2.622.187	2.669.917	2.498.850	2.781.112
Gioia Tauro	0	2.653.000	3.205.859	2.852.264	2.546.805	2.448.570	2.522.876	3.193.364	3.146.533
La Spezia	846.000	910.142	1.024.455	1.285.155	1.300.442	1.473.571	1.409.381	1.173.660	1.476.914
Marsiglia	437.077	722.445	906.000	953.435	1.223.173	1.362.204	1.498.000	1.300.000	1.503.000
Trieste	143.168	206.134	198.316	281.643	501.222	616.156	789.640	776.025	757.255
Capodistria	ND	86.679	179.745	476.731	790.736	911.528	959.354	945.051	996.000
Salonicco	ND	229.475	366.000	273.131	351.407	402.422	449.000	461.000	471.000
Napoli	200.035	397.000	373.626	534.694	438.280	509.876	681.929	643.540	652.599
Livorno	371.173	501,339	658.506	628.489	780.874	734.085	789.833	716.233	791.356
Venezia	114.656	218.000	289.860	393.913	560.301	611.383	593.070	529.064	513.814
Alessandria	ND	ND	733.883	1.354.813	1.688.301	870.540	974.137	1.230.000	1.164.000
Port Said	ND	ND	1.521.855	3.627.813	3.575.857	ND	3.658.159	4.010.000	4.760.000
Ashod	ND	ND	ND	ND	1.307.000	1.525.000	1.633.000	1.584.000	1.612.000
Ambarli	ND	ND	1.185.768	2.540.353	3.091.026	3.122.504	3.104.883	2.887.807	2.942.550
Mersin	ND	ND	596.289	1.030.391	1.466.119	1.553.841	1.854.312	1.948.695	2.106.937
Tangeri	ND	ND	ND	2.058.430	3.000.000	3.312.409	4.801.713	5.771.221	7.173.870
Haifa	ND	ND	1.123.000	1.264.000	1.215.000	1.343.000	1.463.997	1.470.000	1.463.000

Source: Author's elaboration on data from Assoporti, Worldshipping.org, Worldbank.org, Lloydlist.maritimeintelligence.informa.com, various port authorities.

Mediterranean: *Mare Nostrum or Mare Aliorum?*

The Mediterranean, seen as a basin mainly characterised by transhipment movements, has therefore consolidated, in the first two decades of the new century, a purely "medium-oceanic" vocation. The geographical variable, i.e., the position with respect to Suez, has provided shipping operators with sufficient motivation to position their hubs there and develop their strategies.

Among the major investors in the Mediterranean transport scene, China has emerged as a frontrunner for more than a decade now. Although the Mediterranean is not its main geopolitical priority, compared to, for instance, the South China Sea, it has undoubtedly become increasingly important for Beijing as the western terminal of the BRI (Fardella and Prodi, 2017; Ekman, 2018).

The Mediterranean, as a hub of international trade, stands for Beijing as a space of opportunity in which to act through acquisitions and infrastructural investments, the most important of which took place in the Greek port of Piraeus, of which the Chinese company COSCO holds 67% ownership. This acquisition has become the subject of geopolitical narratives aimed at highlighting the conquest geopolitics by the Dragon on the Old Continent, especially if linked to the Budapest-Belgrade-Piraeus railway financed by China, which would play the role of a penetration line within the Balkan interior.

This land infrastructure policy promoted by China has raised concerns for Brussels because it would overlap/compete with the TEN/T network projects. While most of the latter were proposed to ensure the cohesion and accessibility of less advanced regions within the EU, the BRI strategy on eastern European soil is functional to the objectives of the Silk Roads on land and sea and thus responds to Chinese rather than European strategies (van der Putten, 2016).

The Balkans is the European region that saw a great deal of activity towards the end of the second decade of the 21st century on the part of Beijing, which saw the area as a kind of geopolitical fault line within the European Community. Many economic and financial activities involved the acquisition of seaport shares. In Croatia, the port of Zadar has been co-owned by Chinese companies since 2018, and in 2019, COSCO announced the opening of the "Rijeka Land Sea Express" service to Central Europe, which will make the Rijeka gateway the main distribution port option for China in the Balkan Adriatic. In Slovenia, the port of Koper signed a cooperation agreement with the Chinese port of Ningbo.

In Italy, in 2016, COSCO and Qingdao Port bought shares in the Vado Ligure Reefer Terminal, a key port of call, especially in the future when the so-called Terzo Valico high-capacity railway will be built.

Port investments were also made in the Maltese port of Marsaxlokk (in which China Merchants Port has a 49% stake), Marseille (with a 25% stake owned by EuroFos), the Spanish port of Valencia (in which COSCO holds a 51% stake), the Turkish port of Kumport (where it holds a 65% stake), and the North African ports of Port Said and Tangier, where the Chinese also hold part of the *Free Zone Areas* share packages.

Chinese investments, albeit controversial, bear witness to the fact that the Mediterranean is nonetheless seen as a space of opportunity thanks to a "centrality" that has never waned. The "neo-colonialist" characterisation appears to be the outcome more of anti-Chinese geopolitical narratives than of analyses capable of highlighting the structural flaws of a port system that is often unresponsive to the impulses of the global economy. A system, as a whole, has almost always shown forms of adaptation and resilience to changes, even traumatic ones, deriving from exogenous events. It has demonstrated this by its ability to develop alternative relations and forms of exchange, for example, during the aforementioned periods of the closure of the Suez Canal. It has demonstrated this by being able to adapt to changes in global transport. More recently, it has confirmed this with its reaction to the shocks resulting from the pandemic and the Russian-Ukrainian conflict by diversifying supplies as well as de-structuring and re-structuring globalisation-related economic processes that seemed irreversible.

The Resilient Mediterranean Between Pandemic and War

The COVID-19 pandemic led to the second global crisis after the 2008 financial crisis, which caused a recession in all OECD countries and most emerging economies.

The geopolitical and trade tensions between the US and China, the Russian-Ukrainian conflict, and the instabilities in the Middle East have deeply affected the functioning of the economic system, triggering a sharp contraction of trade flows and destabilising the global logistics system.

Global value chains have undergone partial changes in both their structure and operation. Companies, especially multinational ones, have acted through strategies of reconfiguration of raw material supplies, geographical relocation of production, and streamlining of decision-making processes (Giovannetti G., Marvasi E., 2021).

The stability of global financial institutions, sustainable GDP growth, and widely applied logistics concepts such as just-in-time have been challenged, despite support by national governments and some supranational institutions, with a substantial impact on shipping companies and port terminals (Notteboom, Pallis, and Rodrigue, 2021).

The congestion of the entire global port and logistics system, besides producing unreliability in deliveries, has produced inflationary effects in the freight market. Container prices skyrocketed due to a progressive imbalance in the dynamics of demand (which rose sharply in the immediate post-crisis period) and supply (regulated by speculative logic on the part of operators). The consequence was an increase in freight rates of around 500% between the end of 2020 and 2022.

In this framework of strong speculative phenomena, contraction of world demand for goods, and uncertainty, the Mediterranean, as an element of a global supply chain system, could have seen a widening gap with its northern European competitor, which in any case can traditionally count on consolidated critical masses capable of withstanding the impact of crises. Moreover, we have already pointed out how routes competitive to the Suez options are easily activated depending on the geopolitical and geo-economic contexts that are created, from Chinese investment in the Asia-Europe railways as part of the BRI project to the Cape route that, although more expensive, does not involve passing through Middle Eastern areas being at high geopolitical risk.

Nevertheless, the analysis of ship passages through the Canal (Fig. 3) did not show (as of 2022) any negative trends but rather a significant reaction to all the shocks that the (de)globalisation of maritime traffic has experienced from 2020 onwards.

This is not to argue that the global system of traditional supply chains has emerged entirely solid and immune from the pandemic and the war, but to emphasise that the Suez-Mediterranean system has nevertheless maintained high levels of involvement in global maritime transport and, indeed, increased them. This even though the impact on supply chain stability led to inflationary processes and forced a redefinition of industrial and production strategies, which resulted in a substantial reorganisation of oriented production chains (modification of supply systems and shortening of the main value chains). The just-in-time system aimed at reducing or even eliminating warehouse stocks had turned ships into real travelling warehouses. The supply chain crisis forced a paradigm shift in the supply system: from just in time to just in case, i.e., sufficient storage to cope with any supply anomalies (Notteboom et al., 2021; Yan et al., 2021).

One of the solutions adopted by the United States and many Western countries concerned the choice of bringing certain stages of the production chain back home, i.e., to geopolitically "reliable" neighbouring contexts. This process, initiated in the aftermath of the 2008-2009 financial crisis, has triggered a profound reorganisation of production and a radical reconfiguration of global value chains centred on widespread *reshoring* and *backshoring* processes (Ellram et al., 2013; Pegoraro et al., 2020), which are also accompanied by *friend-shoring* practices, i.e., relocation to more politically reliable countries (on this topic, see the work of P. Savi, 2019).

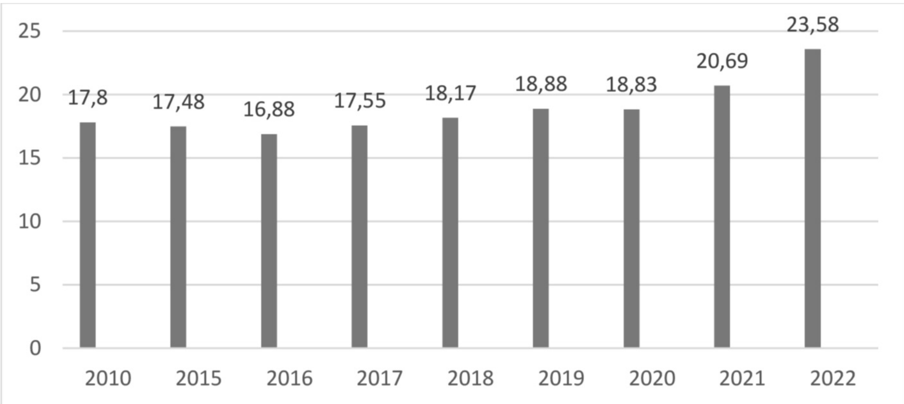
Within this framework of radical change in the economic, logistics, and transport panoramas, the Mediterranean is experiencing *reshoring* movements that can rely on a powerful apparatus of *short-sea shipping* links functional to the development of intra-Mediterranean industrial and commercial flows. Intra-regional routes between 2001 and 2022 grew at an average annual rate of 6.8%. The Mediterranean confirmed its position as the main EU27 area for cabotage traffic with 627 million metric tonnes of goods, accounting for more than 35% of the European figure. Within the basin, Italy is the undisputed leader, with 314 million metric tonnes.

The *reshoring* and *nearshoring* phenomena, although they concern specific sectors with high added value, have shown a certain dynamism in the Mediterranean context, especially towards Turkey and the Balkan countries (e.g., the famous case of IKEA's relocation in 2021 of a large factory from China to Turkey). In the Italian case, on the other hand, the returns have mainly concerned the textile and manufacturing sector towards mostly North African and Balkan geographical destinations (the case of Benetton, which moved 50% of its Asian production to Serbia, Egypt, and Turkey, is well known). According to a study by SRM (2022), 60% of the basin's companies intend to relocate production sites within the basin itself to free themselves from the negative effects of exogenous shocks, assisted in this process by the growth of Mediterranean free zone areas such as Tanger Med and Port Said (the former as a notable automotive hub with the presence of Stellantis and Renault, the latter as an energy and industrial hub, in addition to the seven Special Economic Zones planned in Italy[1]), and the Mersin back-port area in Turkey.

[1] Legislative Decree No. 91 of 20 June 2017, and the subsequent one of 25 January 2018, as part of the urgent interventions for economic growth in Southern Italy,

Historically, the MENA region has had a marginal participation rate in global value chains, partly due to its poor infrastructure connectivity. Within this general framework, many countries on the southern shore have started to invest in rail projects interconnected to seaports, notably Egypt (with USD 66 billion), Algeria (with USD 22 billion), and Morocco (with USD 13 billion) (SRM, 2023). Fundamental investments for the creation of the necessary conditions for the development of cooperative and non-competitive regional value chains with those on the northern shore will strengthen a common fabric to make the Mediterranean return to being the *mare nostrum* and not the *mare aliorum*.

Figure 3: Number of ships transiting the Suez Canal (in thousands)



Source: SRM, 2023, on suezcanal.gov.eg data.

Conclusions

The Mediterranean context has more or less followed a trend that has seen a significant holdup of maritime traffic at the global level. Even gigantism, from which negative outcomes could be expected given a

provided for and regulated the possibility of setting up Special Economic Zones (ZES) within which companies already operating or newly established can benefit from tax breaks and administrative simplifications. The planned Economic Zones are: Abruzzo, Calabria, Campania, Ionica interregional Puglia-Campania, Adriatic interregional Puglia-Molise, eastern Sicily, western Sicily, and Sardinia.

hypothetical and feared contraction in volumes, has fuelled growing transhipment quotas that have enabled Mediterranean ports, as a whole, to close the historic gap with those in northern Europe. The geopolitical variable remains ever-present, activating scenarios capable of conditioning, not in a small way, the picture described. Such as the Russian-Ukrainian crisis, which has forced the reconfiguration of many supply chains, especially in the agricultural and energy sectors; and the recent crisis in the Gulf of Aden, which has forced shipowners to seek alternative routes to the Suez route. Chinese investments in the Arctic, which have given rise to a rich narrative in the Asian scientific literature (Zhang et al., 2018; Cao et al., 2022; Guo et al., 2022), claim to represent a viable and sustainable alternative for trade between the Far East and Europe, although on several occasions we had the chance of refuting such assumptions (Sellari, 2021; Sellari, 2023). Even assuming that the melting of Arctic ice proceeds at the pace predicted by the International Panel on Climate Change, according to which by 2049 the entire Siberian Arctic route would be ice-free for nine months of the year, it would still be a seasonal route subject to risks to navigation and additional costs to ensure its safety (Barnes et al., 2021; Gunnarson and Moe, 2021). It should also be considered that the strategies of shipping companies increasingly favour the use of large container ships that need to make stops along the way. This dynamic can be ensured by the traditional route to the Indian Ocean and the intermediate markets served along the way (the Indian route and the Persian Gulf route), i.e., markets that are not present along the Siberian coast at present. The advantage resulting from the reduction of about 4000 nautical miles between the ports of North Central China and those of the North Sea would be negatively compensated by the reduced speeds that ships in the Arctic must respect for the integrity of the glacial ecosystem.

Even the overland alternative, hypothesised by China through the BRI project, would not appear to be a competitor to the sea route to Suez but, at most, complementary, both because of the geopolitical risks involved in crossing territories with a high potential for instability and because of the small number of goods that can be transferred by rail. And this, even though in the years immediately preceding the Russian-Ukrainian war (2018 and 2019), Eurasian railway lines had transported over 1.5 million containers in a westbound direction (SRM, 2023). Both hypotheses, Arctic and land-based, seem to be a narrative device on the Chinese (and Russian) side to reinforce their control over the Eurasian heartland and the sea (ocean) that surrounds it to the north. There are, therefore, no credible alternatives to Suez and the Mediterranean, at least in the realistically short term.

The Mediterranean as a whole is as divided internally as it is solid in its totality. Between 2001 and 2022, container traffic between Europe and Asia grew at an average annual rate of 4.4%, while the trans-Atlantic route (which in terms of volume, with 36% of the world total, remains the world's largest) increased by 2%. A mid-ocean vocation for deep-sea traffic (12% of world traffic, 27% of container traffic, 5% of crude oil, and 8% of LNG transit through Suez), but also an intra-Mediterranean vocation, fuelled by significant growth in short-sea shipping (6.8% per year between 2019 and 2022) and prospects for growth in industrial relocation.

This is why the *Mare Nostrum* remains "central", despite everything. The real problem of the Mediterranean, in the end, can only be itself and its (in)capacity to activate virtuous processes between the two shores based on cooperation and cultural and functional integration, which Europe, after the failed attempts of the 1990s, should take charge of.

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