

# The Economic Port Landscape. From Traffic to Remaritimisation

El paisaje económico de los puertos. Del tráfico a la remaritimización

## El nuevo paisaje económico de los puertos: desmaritimización vs maritimización

Desde los años 70, el sector marítimo portuario se ha visto sometido a transformaciones de gran envergadura debido a los cambios que han afectado a los sistemas internacionales e industriales. La globalización, el mercado libre, la internacionalización e integración de las empresas, más el crecimiento del comercio mundial, los intercambios de los recursos tecnológicos, humanos, productivos e informativos entre zonas geográficas cercanas o lejanas han tenido un impacto importante sobre el transporte y la logística, los sectores que actualmente constituyen los factores claves para el desarrollo y el cumplimiento de estos procesos estrechamente vinculados.

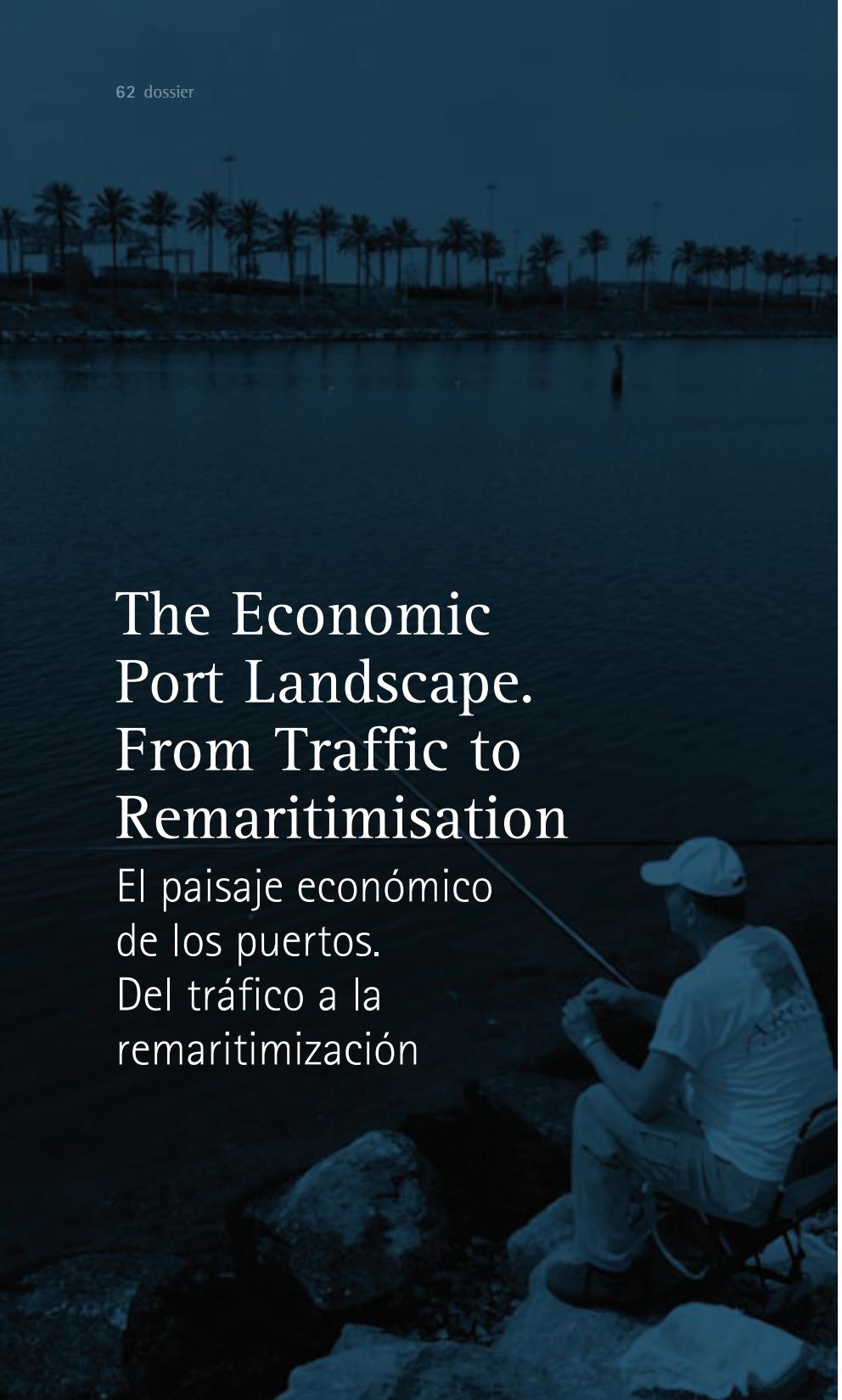
Dentro del contexto de un crecimiento en la demanda para los servicios de transporte marítimo, se han efectuado transformaciones que marcan hito, tales como la carga unificada y el desarrollo posterior del complejo ciclo de transporte intermodal, la especialización de los buques y de los sistemas empleados para manipular las mercancías, el aumento en el tonelaje de los buques, un incremento en la importancia estratégica de la logística – con el fin de gestionar de manera más eficaz y efectiva, las mercancías y los flujos de información para todo el ciclo productivo.

Dichas innovaciones han generado una serie de consecuencias en las relaciones entre el puerto y su sistema económico-territorial<sup>1</sup>. Todos estos cambios, es decir, algunas innovaciones técnicas y organizacionales, como el gigantismo de las terminales portuarias que quitan una cantidad de espacio cada vez mayor a las otras actividades económicas y sociales, y un creciente nivel de automatización, que reduce el impacto directo de las actividades portuarias en cuanto al empleo se refiere, más un aumento en la concienciación del público en las últimas décadas, en la cuestión del impacto negativo sobre el medio ambiente de ciertas actividades – han ayudado a los políticos y al público a darse cuenta de que existen graves incompatibilidades entre las funciones de los puertos y las comunidades urbanas.

A veces se ha acuñado el término desmaritimización para definir la debilitación de las relaciones entre el sistema productivo basado en el puerto y el sistema socioeconómico del territorio (ciudad o región).

El término no resulta del todo libre de ambigüedad. A veces se emplea en un sentido "técnico" para definir la pérdida de importancia económica de las funciones marítimas y portuarias. En otras ocasiones, parece que se emplea para indicar – en un sentido económico más general, y casi cultural – la verdadera pérdida de la naturaleza marítima y la "cultura productiva" de un sistema económico en el cual desaparecen paulatinamente tanto el tráfico internacional, el comercio marítimo y el control sobre las actividades de transporte asociadas con el puerto.

A consecuencia de lo citado, se genera un proceso acumulativo en estos puertos y regiones donde la pérdida de esta "concienciación" o "vocación" marítima da lugar a un empobrecimiento de la industria marítima y



**The New Economic Port Landscape: Demaritimisation vs Maritimisation**  
 Ever since the Seventies, far-reaching transformations have taken place in the maritime-port sector as a result of the past and current changes in the international and industrial systems. Globalisation, free trade, internationalisation and integration of enterprises, growth in world trade, and exchanges of technological, human, production and information resources between neighboring or distant geographical areas have had an explosive effect on transport and logistics, sectors which are currently the key factors for the development and accomplishment of these closely interconnected processes.

In the context of a growing demand for maritime transport services, epoch-making transformations have taken place, such as cargo unitisation and the consequent development of the complex intermodal transport cycle specialisation of vessels and handling systems, the increase in the tonnage of ships, the growing strategic importance of logistics – intended as the efficient and effective management of the goods and information flows for the entire production cycle.

These innovations have generated a number of consequences in the relationships between the port and the economic-territorial system it belongs to<sup>1</sup>. All these changes – namely certain technical-organisational innovations, such as the gigantism of port terminals that subtracts more and more space from other economic and social activities, and their increasing automation which reduces the direct employment impact of port activities; as well as the increase in environmental awareness over the past two or three decades – have heightened the public and political perception of a serious incompatibility between port functions and urban communities. The weakening of the relationship between the production system based on the port and the socio-economic system of the territory (city or region) hosting the port has sometimes been defined as demaritimisation.

This term is not totally unambiguous. At times it is used in an essentially “technical” sense to describe the loss of economic importance of the maritime-port functions. At other times, on the contrary, it seems to indicate – giving it a more general economic meaning, verging on a “cultural” meaning – the actual loss of the maritime character and “production culture” of an economic system in which the vocation for international traffic, maritime trade and control of the transport activities connected with or related to it, is progressively disappearing. The direct consequence is that a cumulative process is generated in these ports and regions where the loss of “awareness” of or “vocation” for the sea leads to an impoverishment of the maritime-port industry, lower investments, lower interest and the loss of political priority for the maritime sector.

Inevitably, the resources/factors of the local system are redeployed towards other sectors that, rightly or wrongly, are considered as more strategic for regional development. Where, on the contrary, in other port regions – with a process that, in the presence of the same technological and organisational transformations of the port industry, transport and logistics, could be defined as remaritimisation – not only are traffic and investments concentrated, but the control of the transport cycles and industrial logistics increases.

**Enrico Musso – Hilda Ghiara**

## Clusters and Port Economies

As it has already been pointed out, the boom in international trade – caused by the international redeployment of production and the changes in the raw material markets and models of consumption – has increased sea and port traffic. After being stripped of their geographical monopolies, ports are now facing an increasingly fierce competition with each other. But the growth in traffic does not automatically lead to increases in added value and in economic benefits for the port region, while it does involve growth in the use of space and infrastructure and rising environmental costs which can generate conflicts and possible “rejections” (the demaritimisation scenario of port cities).

At the local level, it is therefore necessary to focus not only on the efficiency of the logistics cycle, but also on its economic benefits and the local added value, the latter now being considered as a true indicator of the long lasting success of a port.

The concept of the maritime port cluster – as a geographically concentrated population of businesses, associations, public and private organisations which are intrinsically connected around a primary/specialist economic activity – help to assess these effects, going beyond the individual “measurement” of outputs such as port throughput or the industrial activities located in the area. In the perspective of the cluster, what matters is not so much direct employment deriving from port activities which is decreasing due to automation and scale economies, but employment and the added value deriving from activities induced or attracted by ports, the installation of which depends much more on the context of other enterprises and institutions than on traffic volumes.

It is therefore very important to analyse the effects of the port in terms of employment, no longer considered just in terms of persons directly employed in

portuaria, menos inversiones, menos interés y la pérdida de la priorización política del sector marítimo.

Resulta inevitable que los recursos/factores del sistema local se vean reorientados hacia otros sectores que, correcta o equivocadamente, se consideran más estratégicos para el desarrollo regional. Si resulta que ocurre lo contrario, como pasa en otras regiones portuarias – mediante un proceso en el que las mismas transformaciones organizativas y tecnológicas de la industria, el transporte y la logística del puerto suceden, pero en el sentido contrario – se puede denominar este proceso remaritimización. En dicho caso se puede observar no solamente una concentración de tráfico y de inversiones, sino también un aumento en el control sobre los ciclos de transporte y la logística industrial.

### Clústeres y economías portuarias

Como ya se ha puesto de manifiesto, el auge del comercio internacional – provocado por la reorientación de la producción a nivel internacional y los cambios en los mercados de materias primas y en los modelos de consumo – ha dado lugar a un aumento en el tráfico marítimo y portuario. Después de verse despojados de sus monopolios geográficos, los puertos se ven enfrentados y con una rivalidad entre sí cada vez más fuerte. No obstante, el crecimiento en el tráfico no se traduce automáticamente en un incremento en el valor añadido y en beneficios económicos para la región donde el puerto se encuentra ubicado, pero si implica un uso más intensivo del espacio y la infraestructura, además de impactos medioambientales que pueden generar conflictos y posiblemente “rechazos”



Genoa Port Center: inside  
Port Center de Génova: interior



the terminal and port industry, but also, and especially, as the effect on employment generated by the many activities that can still benefit from being located in a port, considering that the spatial relationship between the port and its surroundings is essential, as is the capacity of planning the territory not just according to the performance of modal interchange activities in the strictest sense of the term, but increasingly taking into account the logistics activities that can be functionally connected to the transit of goods through the port hub.

### Strategies for (Re)maritimisation

The new localisation strategies and the potential conflicts arising from the use of the territory have generated new threats and new opportunities for port areas. Naturally, this takes place, now and in the future, in the context of localisation strategies that no longer allow privileged positions (limited to very few activities at the most, the employment potential of which, by the way, is rapidly decreasing) and which, instead, enter the more generalised competition between territorial economic systems for the attraction of economic activities.

We can identify two important factors that can promote discussion on the potential territorial strategies of port cities: to highlight and discuss policies to strengthen and consolidate the cluster as a possible territorial strategy in view of the total or, at least, partial decoupling between traffic volumes and economic growth connected with the port industry; the potential role of territorial bodies, in a strategy of reinforcement – and consolidation of the logistic-port cluster. It has been argued, in fact, that for the purposes of the employment generated by ports, the aspects that are currently important are not only the policies aiming to increase port traffic, but also, if not especially, the policies – territorial, infrastructural, town-planning, fiscal, urban marketing – aiming to create the conditions for maintaining or attracting a logistic-port industry to the port hubs, an industry that at the moment is extremely footloose (i.e.: indifferent as to localisation). The crucial point today, in fact, is that the maritime centre must maintain control of the management functions of the production activities that it is responsible for, and continue to be a centre of production, offering a higher level of services. On the contrary, the possible drain of companies from the port city generates a drop in added value and employment, i.e.: the impoverishment of the local economic fabric, the loss of some leadership functions and, at worst,

(el escenario de desmaritimización de las ciudades portuarias).

Por tanto, a nivel local, es preciso enfocar no solamente la eficacia del ciclo logístico, sino también sus aportaciones económicas y el valor añadido local, lo cual ya se considera el verdadero indicador del éxito duradero de un puerto.

El concepto de clúster marítimo portuario – entendido como la concentración de una serie de compromisos, asociaciones, organismos públicos y privados que se ven vinculados intrínsecamente en torno a una actividad económica primaria/especialista – ayuda a comprender este efecto, llegando más allá que medir simplemente el rendimiento del puerto, en términos de su throughput o la producción de las actividades industriales ubicadas en la zona. Con el concepto del clúster, lo que importa no es la cantidad de empleo que se genera directamente debido a las actividades portuarias, que está decreciendo a consecuencia de la automatización y las economías de escala, sino la creación de trabajo y el valor añadido que surgen a raíz de las actividades inducidas o atraídas por los puertos, cuando la instalación de dichas actividades depende mucho más del contexto de otras iniciativas e instituciones que del volumen del tráfico.

Por tanto, es muy importante analizar los efectos del puerto en cuanto al empleo se refiere, ya no considerando meramente en términos de los que se ven empleados directamente dentro de la terminal y de la industria portuaria, sino también como el empleo generado por las muchas actividades que todavía pueden aprovechar de la ubicación del puerto, teniendo en cuenta el hecho de que la relación espacial entre el puerto y sus alrededores es imprescindible, y lo mismo se puede decir de la capacidad de planificar y ordenar el territorio no exclusivamente en función del rendimiento de las actividades de intercambio modal en el sentido estricto del término, sino cada vez más en base a las actividades logísticas que pueden verse asociadas al tránsito de las mercancías a través del centro del puerto.

### Estrategias para la (re)maritimización

Las nuevas estrategias de localización y los posibles conflictos en cuanto a la utilización del terreno constituyen nuevas amenazas y, a la vez, nuevas oportunidades para las zonas portuarias. Por supuesto, esto ocurre, tanto ahora como en el futuro, dentro del marco de estrategias de localización que ya no admiten situaciones de privilegio (como máximo, reducido a muy pocas actividades, que ofrecen muy pocas posibilidades de crear empleo), y donde hay una rivalidad más generalizada entre los distintos sistemas económicos territoriales para atraer las actividades económicas.

Podemos identificar dos factores importantes que fomentan el debate sobre las posibles estrategias territoriales de las ciudades portuarias: destacar y tratar las políticas que han de implantarse para reforzar y consolidar el clúster como una posible estrategia territorial a consecuencia de la separación total, o por lo menos parcial, de los volúmenes de tráfico y el crecimiento económico asociado con la industria portuaria; el papel que los organismos territoriales pudieran desempeñar dentro de una estrategia de fortalecer y consolidar el clúster compuesto por el puerto y su logística. De hecho, se ha dicho que desde la perspectiva del empleo generado por los puertos, los aspectos que actualmente resultan importantes no solamente son las políticas que tienen como objetivo aumentar el tráfico portuario, sino también, y sobre todo, las políticas – territoriales, infraestructurales, urbanísticas, fiscales y de marketing urbano – enfocadas a crear las condiciones para atraer una industria portuaria-logística hacia los centros portuarios o conservar la industria ya existente, cuando en la actualidad dichas industrias son "muy libres y sin compromiso" (es decir su ubicación geográfica no es un factor muy importante). Hoy día, la cuestión decisiva es que el centro marítimo debe mantener el control sobre las funciones de la gestión de las actividades productivas de las que es responsable, y debe seguir siendo un centro de producción que ofrezca un nivel muy alto de servicios. Si esto no ocu-

the weakening of the port's capacity to act as a centre of growth for the surrounding area.

In a prospect of strengthening the cluster, the port must aim to maintain its leadership in knowledge-intensive activities (organisation of the logistics cycle, forwarding, brokerage, trade, telecommunications, marketing, promotion, research, governance) that highlight a culture of transport and logistics and the consequent research and development activities, learning capacities and/or the introduction of innovative processes, rather than the mere performance of operative procedures which are now highly standardised, even though highly specialised and capital-intensive. This gives the idea of a port whose function is to orchestrate a series of transport activities that it does not necessarily physically host.

### **Land Use and Redevelopment**

These considerations offer indications for policies that prevalently affect the sectors of territorial planning and land use.

The attention of territorial economic analysis shifts towards the competition between ports, their capacity to attract businesses and settlements and the "accessory conditions" of company localisation choices. At the same time, the issue of the environmental costs of economic development is also closely connected to the localisation choices, because they determine both the concentration or the dispersion of the positive economic effects of the production system, and of the negative environmental effects, at least some of them. Generally speaking, therefore, the localisation behaviour of economic subjects is now the main issue in the vast framework of political and economic objectives involved in defining the economic development of ports. As a result, what a port city is able to produce best in relation to its resources and strong points becomes an important factor. Not just a legacy of infrastructure and services, but a spatial concentration of characteristic, as horizontal and vertical relations between enterprises, widespread skills, design capacity, elevated level of internal competition though heterogeneous as regards sector, size and international outlook.

### **New Tools: the Genoa Port Center**

The conditions required to allow this type of cluster policy are the presence of a significant hinterland as regards demographic and economic potential, a certain amount of traffic and the possibility of developing all functions (non-specialised ports). Crucial localisation factors are cumulative external economies: acquired capacity, widespread knowledge, understanding of a dynamic, slow, cumulative development process. In this stage, economic development is achieved and consolidated thanks to the network of services to enterprises, the professional training structures, and the associative forms of enterprises and of labour.

In pursuing this model, the truly significant question is to give the territory the capacity to learn, to introduce/spread process and product innovations, to adapt the cluster as a living organism in the global economy, and to cater to more advanced social and moral needs.

This requirement involves the need for basic and higher training structures, basic and specialised research, support for innovation, initiatives to foster coordination (between subjects belonging to the system) and networking (with external subjects), the presence of decision-making centres and processes. The "infrastructures" that support these processes are the public institutions and enterprises in their potential role as systems of institutional capacity, schools, universities, training and research centres, cultural structures, reception centres or foreign scholars and workers, language-learning structures.

In this context, the capacity to integrate local knowledge and learning processes is a fundamental element. Knowledge (know-how) reinforces sectorial skills and market performance, and is, in a way, the action of the cluster on its own economic environment, the capacity for learning (know-why) forms the learning and innovation processes that will be mainly exploited in the sectors of specialisation but will also adapt the cluster to changes in the external environment (the global economy and society).

The transition from know-how to know-why means that the territory no longer has "just" an "economic ability", but also an economic and entrepreneurial culture that

exists the possibility of that the companies go to the port city generating thus a decline in the value added and the level of employment, that is to say: an impoverishment of the local fabric, the loss of certain functions of leadership and, the worse of all the possibilities, a debilitation of the capacity of the port to serve as a growth center for its hinterland.

To strengthen the cluster, the port must try to maintain its leadership in the activities that revolve around knowledge (organization of the logistics cycle, transportation, brokerage, commerce, telecommunications, marketing, promotion, research, governance) where there is a culture of transport and logistics and the resulting research and development activities, learning capacities and/or the introduction of innovative processes, rather than the mere performance of operational procedures which are now highly standardised, even though highly specialised and capital-intensive. This gives the idea of a port whose function is to orchestrate a series of transport activities that it does not necessarily physically host.

### **Exploitation of the land and new uses**

These considerations offer ideas for policies that have a primary impact on the sectors of territorial planning and land use.

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### **New tools: the Port Center of Génova**

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nación (entre los sujetos que pertenecen al sistema) y networking (con sujetos externos), más la existencia de centros y procesos de toma de decisiones. Las "infraestructuras" que apoyan estos procesos son las instituciones e iniciativas públicas desempeñando su papel potencial de sistema de capacidad institucional, escuelas, universidades, centros de formación e investigación, estructuras culturales, centros de recepción para becarios y obreros extranjeros, y estructuras de enseñanza de idiomas.

Dentro de este contexto, la capacidad de integrar los procesos de aprendizaje y conocimiento locales son elementos fundamentales. Con el know-how se mejoran las aptitudes sectoriales y el rendimiento del mercado, y de una manera estos conocimientos constituyen las acciones del clúster sobre su propio entorno económico; la capacidad de aprendizaje (know-why) forma los procesos de aprendizaje e innovación que serán explotados principalmente en los sectores de especialización, aunque asimismo adaptarán el clúster a los cambios en el entorno externo (la economía global y la sociedad).

La transición desde know-how a know-why quiere decir que el territorio ya no tiene "sólo" una capacidad económica, sino también una cultura económica y de iniciativa que actúa como un factor endógeno de localización e innovación. Este elemento es el más acumulativo (es decir, tiende a reproducirse y ampliarse donde ya se encuentra establecido) y el más "duradero" en cuanto a arraigo territorial, en el sentido de que da su apoyo a los procesos de aprendizaje que crean la capacidad innovadora para el territorio.

Dentro de este marco general, Génova ha estado desarrollando acciones innovadoras para apoyar la identidad del clúster portuario desde el año 2000. En octubre de 2009, se inaugurará una nueva estructura denominada "Port Center"<sup>2</sup>, con el fin de promocionar una concienciación sobre el papel desempeñado por los puertos y la industria del transporte marítimo en la economía y el empleo. Los muelles, las naves, los buques, los astilleros, las oficinas de los armadores y las agencias marítimas, se están convirtiendo en espacios donde se puede aprender sobre las diversas situaciones económicas del puerto en el pasado el presente y el futuro, y cómo el puerto encaja dentro de las estrategias generales del país y de la Unión Europea. En primer lugar, el Port Center de Génova es un servicio orientado hacia un amplio abanico de público, y su objetivo principal es conseguir que tantas personas como sea posible visiten el puerto y se familiaricen con sus distintas actividades (enseñanza permanente y sala de exposiciones, visitas (tierra y mar), instalaciones e información en zonas públicas frente al puerto, publicaciones, página web, interconexión con otros Port Centers de Europa). Asimismo, el Port Center desempeñará el papel de servicio didáctico dirigido a estudiantes, profesores y padres (proyectos, visitas guiadas, tecnologías didácticas, datos y estudios en profundidad, laboratorios, etc.). Podría acabar desempeñando el papel de servicio para empresas (casetas, reuniones, visitas, perfil de empresa, comercialización de productos). En base a estos tres objetivos, es una experiencia pionera asociada a las políticas de clúster para los puertos marítimos.

#### Notas

1. Véase Musso E., Benacchio M. (2002), Musso E., Ghira H. (2007)
2. Los promotores del Port Center de Génova son: Provincia di Genova (Financing, fund raising, community); University of Genoa (Scientific partner: R&D, benchmarking, networking), Genoa Port Authority (Dominus); Military maritime authority (Capitaneria di porto) (Co-dominus); Porto Antico S.p.A. (Commercial developer: marketing, incoming).

acts as an endogenous factor of localisation and innovation. This is the most cumulative element (that is, it tends to reproduce and grow where it is already present) and the "longest-lasting" in terms of becoming rooted in the territory, because it anchors learning processes that create a regional capacity for innovation.

In this general framework, ever since 2000 Genoa is developing innovative actions to support port cluster identity. A new structure, called "Port Center", will open in October 2009 to promote awareness about employment and the economic role of ports and the shipping industry. The docks, warehouses, ships, shipyards, shipowners' offices, shipping agencies, become spaces to help discover the port, to understand the various historical, contemporary and future economics of the port and how they fit into the more general strategies of the country and the European Union.

The Genoa Port Center is first and foremost a service oriented to a large audience, to introduce and lead people to visit the port (permanent teaching and exhibition facilities, visits (land and sea) to the port, installations and information in public areas facing the port, publications, website, networking with other European Port Centers). The Port Center will also serve as an educational service addressed to students, teachers and parents (projects, guided tours, didactic technologies, data and in depth studies, labs and educational material). And finally, it could become a service for businesses/firms/companies (stands, meetings, visits, company profile, merchandise). Based on these three main objectives, it represents a pioneer experience in the area of maritime port cluster policies.

#### Notes

1. see Musso E., Benacchio M. (2002), Musso E., Ghira H.(2007)
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