Ministro per il Sud e la Coesione territoriale

VERSO SUD

The European House Ambrosetti

THE EUROPEAN STRATEGY FOR A NEW GEOPOLITICAL, ECONOMIC, AND SOCIO-CULTURAL SEASON IN THE MEDITERRANEAN

FERROVIE DELLO STATO ITALIANE

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10 KEY MESSAGES THAT EMERGE FROM THE WHITE PAPER

I. THE WIDER MEDITERRANEAN IS BECOMING MORE AND MORE STRATEGIC. AT THE SAME TIME, MAIN TRENDS AND CHALLENGES FIND THEIR SYNTHESIS IN THIS REGION

1. The initiative "**Verso Sud**: The European strategy for a new geopolitical, economic and socio-cultural season in the Mediterranean" (hereinafter also referred to as "Verso Sud") adopts an innovative point of view to look to Southern Italy. It identifies both a new vision and a development agenda, adopting a new paradigm to look at Southern Italy: from being Europe's less developed region to affirm as the strategic hub and pivotal platform for Europe in the Mediterranean and Wider Mediterranean reference area.

2. Mediterranean Region, after a period of marginalization (at least a perceived one), is assuming new strategic centrality from multiple standpoints. "Core" Mediterranean includes, from the perspective of this White Paper, **22 countries** from the EU, the Baltic area, the Middle East and North Africa, all of which share the basin as their reference area. The Wider Mediterranean, on the other hand, includes a total of **45 countries** and extends from the Atlantic Ocean to the Persian Gulf, encompassing those territories that do not directly gravitate around the Mediterranean, but which have to relate to it considering several issues (demographics, energy corridors, trade, ...) and defining their own strategies.

3. Although the Mediterranean Sea covers only 1% of the world's sea surface, the countries of the Wider Mediterranean host **15.5% of global population and 14.5% of GDP**. Moreover, the Mediterranean Sea is the cornerstone of four major geo-economic areas: the African Continental Free Trade Area (AfCTA), the European Union, the North American Free Trade Agreement (NAFTA) and the Regional Comprehensive Economic Partnership (RCEP).

4. The Mediterranean is also gaining increasing centrality due to ongoing global trends and structural changes. Among others, between 1995 and 2019, container traffic between Europe and Asia grew at an average annual rate of 8.2%, more than the two other main routes: the trans-Atlantic route (+4.4%) and the transpacific route (+5.2%). Then, in 2013, China launched the One Belt One Road Initiative, to connect the Chinese port hubs with the Indian Ocean and the Mediterranean, passing through the Straits of Malacca (Malaysia) and Suez. In 2015, the doubling of the Suez Canal made the Mediterranean a key player, representing **20% of global shipping**, **27% of container liner services** and 30% of oil traffic. In recent years, trade wars first, and the pandemic later, have led to a progressive reconfiguration of

Global Value Chains (GVCs), fostering a re-regionalization, with reshoring and nearshoring. The Build Back Better World (B3W, a strategy launched in 2021 by the U.S. for infrastructure development in middle- and low-income countries) is also expected to further boost investment in the MENA region.

5. In 2022, the conflict between Russia and Ukraine has disrupted the continental Eurasian trade routes, which have found an **alternative** in the routes that reach the Mediterranean through the Red Sea and the China - Central Asia - Turkey route. Also, the crisis in the supplies (especially in the agri-food field) and the energy crisis, make the Mediterranean one the right "dimension" to achieve a long-term strategic reorganization. Finally, both demographic dynamics and climate change require immediate responses at Mediterranean and Wider Mediterranean levels.

II. IN THE REGION OF THE WIDER MEDITERRANEAN, SOUTHERN ITALY TURNS OUT TO BE COMPETITIVE AND ATTRACTIVE

6. With the aim of framing Southern Italy in relation within the reference region of the Mediterranean and assessing its performance in terms of attractiveness and competitiveness, The European House-Ambrosetti, with the Minister for the South and Territorial Cohesion, has carried out **a socio-economic analysis of** the area to compare, in an innovative key, Southern Italy with the Mediterranean countries and three benchmark areas (average of the North Shore of the Mediterranean, the South Shore and the Wider Mediterranean) along 4 domains of analysis: economic, social, energy and innovation. The analysis studied 22 Key Performance Indicators (KPIs) for 42 countries and 20 regions over a 10-year horizon, for a total of more than 13,600 data points. The analysis is not exhaustive but is intended to represent a census of data against which to develop guidelines and thematic proposals for the new Southern Italy development Agenda.

7. The result is a synthetic index for each domain of analysis, which assigns a score from 0 (worst performer) to 1 (best performer) to each country. **Southern Italy ranks in the Top-10 for each of the 4 dimensions**: 6th out of 20 countries in the economic domain with a score of 0.39 (vs. 0.34 Mediterranean average); 7th out of 21 in the social domain with a scoreof 0.56 (vs. an average of 0.51 for the Mediterranean); 3rd out of 22 countries in the energy domain with a score of 0.61 (vs. 0.49 average for the Mediterranean) and 9th out of 20 countries in the innovation domain with a score of 0.39 (compared with an average of 0.38 for the Mediterranean).

8. Specifically, Southern Italy ranks in the last 6 positions in only 1 KPIs (investments on GDP), while it ranks in the first 6 positions for 7 KPIs (birth rate of companies, renewable energy, gas and oil production, electricity imports, change in energy consumption, high-tech exports, doctors per 1,000 inhabitants). Overall, the ranking provides a **more attractive** image **of Southern Italy** than the one generally known and widespread, precisely because of a paradigm shift, which considers this territory with reference to the area of the Mediterranean and the Enlarged Mediterranean, rather than comparing it to the EU or considering the individual regions that comprise it in a national framework.

III. A NEW DEVELOPMENT AGENDA FOR SOUTHERN ITALY MUST BE BASED ON AN INNOVATIVE AND SHARED VISION, WHICH RECOGNISES SOUTHERN ITALY'S STRATEGIC AND CENTRAL ROLE WITHIN THE MEDITERRANEAN. HERE IT CAN BE A STRATEGIC PLATFORM OF CONNECTION BETWEEN THE TWO SHORES AND A KEY PLAYER TO WIN REGIONAL CHALLENGES

9. An effective development strategy for a territory cannot be separated from the definition of a **medium-long term** vision. Nor can be ignored the fact that, in line with this definition, targeted, concrete and integrated choices are made in the economic, social and organizational fields of the territory itself. According to The European House - Ambrosetti methodological model, the vision indicates the path to be taken and the **future orientation of** a territory in terms of strategic development guidelines. Each territory must create a strong positioning ("identity") of itself, investing in productive activities, skills and instruments of governance and communication that guarantee a source of structural competitive advantage. In short, the vision is therefore the prefiguration of what a territory intends to become together with its development model (based on shared priorities), its vocation and distinctive competencies.

10. Following both the analysis of Wider Mediterranean region and the results of qualified stakeholders' interviews, we have elaborated the following vision for a Southern Italy capable to become protagonist of the Euro-Mediterranean scenario: "***To be a hinge between Europe and the Wider Mediterranean, constantly contributing to design, interpret and implement the plan of a Europe as a protagonist of the great geopolitical, economic and social changes that influence the co-building of a stronger, fairer and more cohesive wider Mediterranean society***".

11. This vision leverages the **assets that Italy has in Southern Italy,** does not create competition between individual southern regions and intends to enhance Southern Italy as a **place of opportunity** but also of experimentation of best practices. At the center of this vision there is:
    - awareness of its **privileged geographical position** as a hinge between Europe and Africa and as the center of the Wider Mediterranean macro-area of Southern Italy, and, consequently, of its potential transition from a suburbs to a global center, together with the increasing centrality acquired by the Mediterranean basin;
    - the urgency to find concrete and practical answers to the security working table in Europe, **by** stimulating a growing **supranational collaboration among the Mediterranean countries and adopting a** more modern, courageous and poly-centric **Industrial Policy plan;**
    - the **desire** of businesses, universities and citizens of Southern Italy to participate in the new development agenda of Southern Italy, to trigger a great path for the relaunch of Italy and Europe in the Mediterranean macro-region. To achieve it, it is essential a **constant commitment** of the national government, the regions and the European leadership, in **eight areas identified by the Advisory Board of the initiative**.

12. The eight areas identified include six guiding themes for the

revitalization of the South in the Euro-Mediterranean framework:

- the central role of the **Economy of the Sea** for the competitiveness, attractiveness and growth of Southern Italy and the Mediterranean;
- the new **energy corridors** and the challenge of the green transition as hinge of the Mediterranean of the future;
- **infrastructure investments** and the new evaluation model to deploy their positive effects;
- the development of the **tourism sector** for the benefit of the territories, for a more attractive South in the Mediterranean;
- **production specializations** in the new global value chains;
- Southern Italy as a center of expertise for **universities** in the Mediterranean area.

In addition to these, there are two cross-cutting areas that are crucial to achieving the vision: the **communication** of the new vision and the role for Southern Italy, and the **governance** required to implement the new vision and maximize its benefits.

IV. SOUTHERN ITALY, IN LIGHT OF THE IMPORTANCE OF ITS PORTS, ITS POSITIONING AND ITS DISTINCT COMPETENCIES, MUST ESTABLISH ITSELF AS A MARITIME PLATFORM LINKING EUROPE AND THE MEDITERRANEAN, AND BECOME A LEADER IN MARITIME ECOLOGY IN THE FIELDS OF TRANSPORT, SHIPBUILDING AND TRAINIG

13. **The economy of the sea** already represents a particularly important sector for Southern Italy. This economic macro-sector accounts for **4.4% of the** value added of Southern Italy compared to 3% at national level. Similarly, it accounts for **5.7% of employment** and **4.6% of the total number of companies**, compared to a national weight of 3.5% and 3.4% by 2020. The economy of the sea in Southern Italy has an economic multiplier of **1.8** (which reaches 2.8 for the sub-sector of goods and passenger handling).

14. **Southern Italian ports** already **boast numerous national and international records**: they account for 46% of Italy's[1] seaborne goods traffics and contribute to the internationalization of businesses. In fact, 64% of Southern Italy's import-export traffic is by sea (compared to 36% in the Centre-North). Southern Italian ports are also significant in passenger traffic: they account for 33% of national cruise traffic and **many new** cruise **terminals** have been planned in the South: Palermo, Messina, Trapani, Bari, Porto Empedocle. More in general, at national level, at least one port in Southern Italy is positioned in **the top-3 in all segments of maritime freight transport**, while together, the macro-area has a **competitive advantage in short-haul freight transport**, increasingly relevant with the regionalization of supply chains and able to make Southern Italy a real hinge between Europe, the MENA area and the Enlarged Mediterranean.vera e propria cerniera tra Europa, area MENA e Mediterraneo Allargato.

15. In this context, it is proposed, among other things, to make the ports of Southern Italy real platforms for the **development of the territories in terms of industry and production**, assigning a central role and appropriate powers to the port authorities, so that they can act as real market players, creating innovation poles, startup incubators and partnerships with universities. It is also proposed to review **overall governance, for** example by establishing a central coordination body. Another priority is the completion and further development of **port infrastructures** (seabed, intermodal connections, etc.), also in digital terms. In terms of skills, it is proposed to create a training **academy** in shipbuilding and ship services in Southern Italy, which would be a reference in the Mediterranean. It is also necessary to further develop the **shipbuilding** sector in Southern Italy, starting from centers of excellence and promoting aggregation and dimensional growth. Finally, more specifically, it is proposed to promote an extension of the benefits provided by the **International Registry** on employment to companies under the European flag.

1 *In questa percentuale è contenuto anche il transhipment.*

V. SOUTHERN ITALY MUST ESTABLISH ITSELF AS THE ENERGY HUB OF THE MEDITERRANEAN REGION, CONNECTING THE SOUTHERN SHORE WITH EUROPE AND TAKING THE LEAD IN A REGIONAL ENERGY AND CLIMATE CHANGE STRATEGY

16. Southern Italy can become the protagonist of the green transition and the new energy routes in the Euro-Mediterranean framework: it is in fact the **country's "reservoir" of renewables**, already produces 52.3% of the national share of wind, solar and bioenergy and can offer an excellent contribution to the achievement of decarbonization targets. The South also has ample resource potential in areas and technologies that are emerging or undergoing strong development, such as **hydrogen and renewable energy related to wave motion.** With reference to the latter, the areas with the highest potential for wave energy are the western coasts of Sardinia and Corsica and the Channel of Sicily. At the same time, however, in Italy the average delay to authorize a renewable plant is almost 6 years, in addition to the 2 years required by law due to **regulatory complexity**, which Draghi Government intend to solve through a recent Decree Law. Finally, Italian companies incur the highest costs in Europe to obtain authorization for a renewable plant.

17. Southern Italy also has a natural vocation in establishing itself as **an energy link** between Europe and the Southern Mediterranean, thanks to the gas pipelines and sea routes that insist on it. In light of the conflict between Russia and Ukraine, imports from southern Mediterranean (which has 5% of the world's known oil, gas and coal reserves) will continue to support Italian and European energy needs and the South will continue to be a hub for energy flows to Europe from North Africa (Transmed and Greenstream) and Asia (TAP and EastMED). Thanks to its port capacity, the South is also the ideal platform for the transport of energy resources by sea. The Southern Italy is, therefore, already today a pivot and must increasingly establish itself as a **leader in energy cooperation between the north, south and east sides of the Mediterranean basin.** Similarly, it will have to assume a leading role in the energy transition and in the development of mitigation and adaptation strategies to the climate crisis: the South and the Mediterranean are in fact among the main hotspots affected by the impacts of **climate change.**

18. To achieve these objectives, the White Paper proposes first of all to make Southern Italy a leader in the Mediterranean for production and innovation inthe field of **renewable energy sources**, further simplifying regulations and authorization procedures and creating a **leading district associated with the energies of the sea.** It is also proposed to invest in the **strengthening of pipelines and regasifiers** in Southern Italy and to establish Italy as a promoter of a **Mediterranean energy strategy**, which brings together the main producing and consuming countries, to develop proposals and shared roadmaps. It will also be essential to develop the ports of Southern Italy as real **energy hubs** and strengthen the **capacity of Southern Italy in combating, mitigating and adapting to climate change**, making it a protagonist in research and technological development at the international level. In this sense,

Southern Italy and the country could host a major **Mediterranean Conference** on the subject. Finally, it is proposed to overcome resistance to the creation of infrastructure by involving the territories and improving the communication of impacts to **move from the logic "Not in my backyard" (NIMBY) to the "Please in my backyard" (PIMBY)**.

VI. INFRASTRUCTURAL DEVELOPMENT IS A CORNERSTONE FOR THE GROWTH AND COMPETITIVENESS OF SOUTHERN ITALY, BOTH IN TERMS OF PHYSICAL AND DIGITAL INFRASTRUCUTRE. HOWEVER, IT IS NECESSARY TO IDENTIFY INNOVATIVE WAYS OF PLANNING INFRASTRUCTURE INVESTMENTS AND INTERVENTIONS THAT GO BEYOND THE MERE ECONOMIC LOGIC FOCUSED ON COSTS AND SHORT TERM

19. Today, infrastructures represent a critical node for Southern Italy. With reference to physical and mobility infrastructures, despite an often above-average network endowment, southern regions are, for example, penalized by the absence of rail services on those same infrastructures. In addition, current models **for evaluating infrastructure investments** do not consider the transformative potential of infrastructure development for the entire economy in terms of attractiveness, competitiveness of territories and economic activation, and often overlook the need to guarantee services and not just physical infrastructure. While waiting for the planned PNRR investments to be made **intermodality is** also **underdeveloped**, despite the fact that it is crucial for the affirmation of Southern Italy as a hinge connecting Europe and the Southern Shore and for the success of SEZs as a lever for relaunching the South. Among the ports in the South, only 7 out of 34 are connected to the National Rail Infrastructure (21% of the total, compared to an average of 37% in Italy and 71% in the Centre-North). Among the southern core ports (i.e. the main nodes at the center of the European TEN-T network), there are 5 (out of 7) not connected to the rail infrastructure. Moreover, in Southern Italy there are only 5 freight villages compared to 16 in Northern Italy.

20. There are margins for development also considering the degree of digital infrastructure in Southern Italy. In fact, in 2020, all southern regions will be positioned in the **lower part of the European ranking that measures the degree of digitalization** (DESI Regional Index). In addition, Southern Italy hosts only 10 **Data Centers**, equal to 13% of the country's total, and 4 regions do not have any (Molise, Basilicata, Calabria and Sardinia). These gaps occur even though Southern Italy is a nerve center for new Internet connections and the Data Economy, and even though digital infrastructures are now essential for economic development, territorial competitiveness and the attraction of talent.

21. Among the proposals identified in this thematic area, it is indicated to **redefine the indicators currently used in infrastructure** according to criteria of significance; to **rethink** the **evaluation and incentive models** underlying infrastructure development through criteria that recognize not only the economic return, but also the contribution to territorial competitiveness, cohesion, development and social

welfare; to define **essential levels of local public transport.** It is also necessary to ensure effective coordination in the supply of the different transportation methods by launching a **major plan for intermodality and integrated mobility** in Southern Italy. Finally, it is proposed to make Southern Italy the strategic hub of the **digital geopolitics of** the Mediterranean by launching pilot programs in frontier technologies and public-private experimentation, deploying basic digital infrastructure (Broadband and 5G) throughout the territory, providing the regions of Southern Italy with Data Centers and promoting consortia.

VII. WE NEED A NEW STRATEGY FOR TOURISM THAT POSITIONS SOUTHERN ITALY AS A DESTINATION OF REFERENCE IN THE MEDITERRANEAN. THIS WILL HAVE AS OBJECTIVES THE DESTAGIONALIZATION OF THE FLOWS, THE CREATION OF VALUE ON THE TERRITORY, AN INTEGRATED TERRITORIAL MARKETING AND THE DEVELOPMENT OF INNOVATIVE AND COMPETITIVE PRODUCTS AT INTERNATIONAL LEVEL

22. In a context that sees Italy as the third country - after France and Spain - for tourist attractiveness in the Mediterranean considering pre-Covid-19 tourist arrivals (2019), Southern Italy shows a performance below its potential. **In fact, the South attracts fewer foreign tourists than the rest of the country**: 18.5% of the national total. The incidence of foreigners on the total number of tourists then stops at 37.7% in Southern Italy compared to 49.5% nationally. This is despite **a unique natural and cultural heritage** that includes, among others, 16 of the 24 National Parks, 22 of the 58 UNESCO World Heritage Sites, 5,805 kilometers of coastline (73.4% of the national total).

23. Also in light of the major megatrends affecting the sector at a global level, it is necessary to enhance the rich historical-cultural heritage (today the per capita expenditure of the municipalities of Southern Italy in culture is only 8.9 Euros compared to an average of 19.4 Euros in Italy) and food and wine (Southern Italy is the first area in Italy with 138 products with registered trademarks), developing an offer that already has the potential to meet the growing demand for sustainability and authenticity of tourist experiences. In the same perspective, however, it is necessary to **reduce the strong seasonal nature of tourism** (average seasonality index of 3.3 vs. 2.5 in Italy) **by developing products that go beyond beach tourism with low value added** and spin-offs for local areas. It is also necessary to improve the supply of services (only 17.1% of Italian hospitality facilities are in the South) and connections, as well as digital equipment.

24. In this sense, we must immediately invest in preserving, restoring and enhancing the natural and cultural heritage of Southern Italy and connect the historic villages, to **develop a tourism offer and integrated products** between different municipalities and regions of Southern Italy, and to implement an integrated cruise strategy for Southern Italy. Secondly, **hard and soft infrastructures** must be created to enable the development of the tourism sector in Southern Italy, starting with a program of incentives for the digital transformation of tourism operators and creating an Academy of excellence for tourism professions in Southern Italy (**Alta Scuola Mediterranea sul Turismo**). Finally, it is necessary to strengthen the activities **of territorial marketing and destination management** on a Mediterranean scale, also by creating a system of partnership between Italy and some countries in the area, to develop synergies between tourism operators and territories.

VIII. THE DEVELOPMENT OF MANUFACTURING AND THE ATTRACTION OF PRODUCTIVE INVESTMENTS, STARTING WITH THE KEY SECTORS FOR THE ECONOMY OF SOUTHERN ITALY, CAN HAVE POSITIVE REPERCUSSIONS FOR THE REST OF THE COUNTRY AND MUST BE SUPPORTED BY THE FULL AND RAPID DEVELOPMENT OF THE SEZS AS A LEVER OF INDUSTRIAL POLICY

25. The South is home to an ecosystem of industrial poles and large-scale enterprises, leaders in Italy and worldwide, with industrial specializations in sectors such as: **aerospace, automotive, clothing-fashion, agri-food and pharmaceuticals.** The Southern Italy is also a significant player in the national **bio-economic chain** which, with a value of 24.4 billion Euros and with approximately 732 thousand employees, represents 24% and 36.5% of the relative national figure respectively. Southern Italy is also 4th in the Mediterranean for the incidence of **high-tech** exports on total exports (20.8%), and high-tech productions in the South have had much higher growth rates than their counterparts in the rest of the country.

26. Manufacturing in Southern Italy is closely interconnected with the production of the rest of the country: in fact, southern companies are part of national (and international) value chains as upstream suppliers in the supply chain, generating value well beyond the local economies of reference. Just think that, in the manufacturing sector, **€100 invested in Southern Italy generates an additional impact of €58 in the rest of the country** (Centre-North). The role of the South is crucial - and will increasingly be so - also in the light of the regionalization of value chains and the European strategies of **industrial policy** and **food safety.** With reference to the latter, the role of Southern Italy is becoming central, also due to the consequences that the crisis between Russia and Ukraine is having on the availability of agrifood production in Europe and, above all, in the MENA area and, as a result, in Sub-Saharan Africa and developing countries.

27. In order to enhance the role of the South as a manufacturing hub of the country, in Europe and in the Mediterranean, it is proposed to identify, starting from large leading players, opportunities for the development of **technological industrial clusters in Southern Italy**, starting from the sectors and strategic areas identified by the new EU industrial policy. It is also proposed to launch a **partnership on food security** among the countries of the Mediterranean area, identifying some pilot products for which to start the development of a real Euro-Mediterranean agricultural chain, with common value and processing chains. A fundamental role is assigned to **SEZs**, rapidly implementing the infrastructural investments envisaged within them by the PNRR and monitoring the effects of the recent governance reform, to intervene - where necessary - with further regulatory instruments for simplification and incentives. Their development in an integrated manner with other Mediterranean SEZs could contribute to assigning Southern Italy the role of key productive hub and regional junction in the Mediterranean.

IX. THE SKILLS ISSUE RISKS HOLDING BACK THE IMPLEMENTATION OF THE NEW AGENDA FOR THE DEVELOPMENT OF THE SOUTH ITALY, AND CAN ONLY BE SOLVED WITH A STRONG ACTION AT THE REGIONAL LEVEL, INVOLVING EUROPE, THE COUNTRIES OF THE SOUTHERN SHORE, STARTING FROM UNIVERSITIES, PROMOTING COLLABORATION BETWEEN UNIVERSITIES, AND ENHANCING THE ROLE OF ITS

28. Current demographic trends pose key challenges for the future of the Mediterranean. For example, while the countries belonging to the Southern shore will see their populations increase by a total of 109 million inhabitants between 2020 and 2050, those on the Northern shore will see an increase of only 1.4 million inhabitants. The EU, on the other hand, will see a decrease of 21.5 million inhabitants, of which 5.5 in Italy and 3.5 in Southern Italy. In **the** same period**, Southern Italy risks going from being the youngest area in Italy to the oldest**. At the same time, Europe, Italy and Southern Italy are faced with the problem of the **lack of** high-level/specialist **competencies**, especially related to digital transformation, with reference to the Public Administration and all the key sectors identified up to now. Medium-level skills are also in short supply.

29. A key role can be played by the education and research ecosystem in the South, starting with the **revitalization of the universities and their expansion into networks**. Between the academic year 2010/2011 and the academic year 2020/2021, Southern Italian universities have lost 85,673 students (Northern Italian universities have gained 85,085 in the same period). **Vocational training** also needs to be enhanced. In Southern Italy there are 47 of the 120 national ITSs with 4,440 students enrolled, equal to 26% of the national total, but with a high average dropout rate: 30.6% vs. 22.8%. This is in spite of employment rates, consistent with the course of study 12 months after graduation, of 92%.

30. In order to win the challenge related to talents and human capital, it is proposed to promote **the exchange of knowledge and synergies between the universities of Southern Italy and the countries in the Mediterranean area**, starting from the major issues of interest for the Region and creating shared initiatives within the area. In this sense, public partnerships (between universities) and public-private partnerships (which also involve production and research in the territories of reference) between universities in the Mediterranean can be launched and the model of **ecosystems of innovation** (Mission 4 of the PNRR and investment included in the Complementary Plan) can be extended. In the same way, the ITS system and the attractiveness for students from the Mediterranean area can be strengthened, for example by focusing the missions of ITS foundations and launching **training partnerships between foundations and homologous bodies** from Mediterranean countries.

X. THE GOVERNANCE AND COMMUNICATION OF THE NEW DEVELOPMENT AGENDA FOR SOUTHERN ITALY IN THE MEDITERRANEAN ARE ENABLING FACTORS FOR THE REALIZATION OF THE VISION. IN FACT, IT IS NECESSARY TO INITIATE A REVIEW OF GOVERNANCE, STARTING WITH THE ACTORS INVOLVED IN THE IMPLEMENTATION OF THE NEW AGENDA, AND TO LAUNCH A COMMUNICATION STRATEGY THAT WILL POSITIVELY TRANSFORM THE PERCEPTION OF THE SOUTH ABROAD

31. Today, fragmentation, duplication and inconsistency, both in general and within specific thematic areas, risk frustrating the ability of the country and Southern Italy to realize the vision that has been hypothesized. For this reason, it is proposed For this reason, it is proposed to **reinforce the Minister for the South and Territorial Cohesion's coordination power.** At the same time, the government will have to work in all appropriate forums to give Italy leadership - within the EU framework - in Mediterranean development and cooperation policies. In this sense, it will be possible to revitalize the Union for the Mediterranean, profoundly changing it, or, alternatively, to create a new **platform for dialogue, reflection and strategic planning that takes on a more business, private dimension and characterization, on the model of the Sorrento initiative Verso Sud.** Finally, it is hoped a reform that will overcome the current problems, in terms of duplication and overlap, related to the allocation of responsibilities between the Government and the Regions, and that concern the **Title V of** the Constitution.

32. With reference to communication, the Advisory Board recognized how Southern Italy (and Italy in general) continues to be portrayed through stereotypes, constantly portrayed as a country and a region that lives off the backs of others, as the lowest-performing and least developed region in Europe. Acknowledging that the promotion **of** the Southern Italy system must be integrated into an **overall country communication process**, it is suggested to launch a communication campaign, based on the concept of the diversity of Southern Italy, both in terms of its uniqueness and distinctiveness, and with reference to the region's otherness with respect to the stereotypes that are common in Italy and abroad. This communication campaign must also enhance those elements capable of positioning Southern Italy as a competitive region in the Mediterranean and a hinge of connection between Europe and the Southern Shore. In synergy with the #ItalyIsDifferent communication campaign, in order to dispel false myths about the South, we suggest launching the **international #SouthIsDifferent campaign.**