

American Reshoring: A Model for Italian Economic Development

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Abstract

The United States has been one of the frontrunners in offshoring and outsourcing initiatives over the past two decades seeking to obtain a competitive advantage in the manufacturing and service industries. Due to offshoring, unemployment rates soared. The promises of low-cost countries have not materialized, and the costs of producing goods abroad has substantially increased. After several years of experience and greater understanding for offshoring, many American companies have decided to reshore. Local governments are providing incentives to companies to stimulate the re-birth of American manufacturing with the potential to reduce unemployment rates and the growing trade deficit. Italy experiences a similar situation. However, Italian companies are still sluggish in their reshoring efforts and there is not much evidence of any concerted effort from the government to enact policies that may attract the companies that offshored. The purpose of this study was to provide an analysis of the strategies used by the US government promoting reshoring that could be adapted to the Italian market and current situation.

Introduction

Globalization and the disappearance of borders between countries is affecting the way we do business and in particular the internal organization of companies [1]. Over the past decades the world has witnessed the birth of a new economic order, the reorganization of financial systems and the growth of new economic powers such as China and India. These emerging economies are reaching a more dominant position in the global economic arena and they have been the principal target of offshoring [2]. However, offshoring is not a new phenomenon. In 1911, the Ford Motor company moved its assembly operations to Trafford Park, (England) seeking to reduce transportation costs and better supply the European market [3].

The first companies that have embarked in offshoring have been multinational enterprises, trying to adapt their structures and strategies to diverse cultures, frequently with poor results [4]. Today the advanced stage of market globalization and the advent of communication tools, such as the Internet, allow small and medium enterprises to build a market strategy and to succeed in market niches that are distant and unknown. According to Manning et.al. the terms outsourcing and offshoring are often used interchangeably but in fact the two concepts refer to two different strategies implemented by companies. Outsourcing refers to the

physical boundaries of the enterprise, as it consists in a practice that granted to a third party (domestic or offshore), the creation of products and/or services. Offshoring, instead, refers to the process of sourcing any business function supporting domestic or global operation from abroad, in particular from low-cost emerging economies, either through a wholly owned subsidiary or a third-part provider [5].

In the offshoring process of manufacturing and services activities, the selection of location is a key factor. Among the multiple dimensions taken into account by companies in their offshoring considerations, location and total labor costs seem to be the most relevant. Thereafter, companies look at the flexibility of the labor market, the characteristics of industrial relations; the availability of incentives/benefits provided by the governments, the physical infrastructure and transportation efficiency of the country. Despite the many benefits of offshoring, any strategic decision as significant as this presents risks such as lack of flexibility, hidden costs, quality, loss of control, loss of Know-How and finally customer dissatisfaction. In the past few years, however, the most important risks are of economic character. According to Sirkin, there has been a large reduction in total production cost differential between western and Asian countries, primarily due to the increase in labor costs experienced in developing countries. In China's case the rise of labor cost has steadily increased at a rate of 10 to 20 percent per year, while in most western countries the rise has only been of about 2 to 3 percent for the same period [6].

The Boston Consulting Group identified additional forces that have reshaped the map of international competition between 2004 and 2014, prompting companies to re-evaluate their location choices. Among these forces are exchange rate variations, labor productivity (which increased by more than 50 percent in some western countries) and the declining cost of energy in the United States. Economic and political stability are other factors currently receiving greater attention in the selection of host countries. All these factors have, over the years, reduced, the comparative advantage of developing countries and given rise to a new phase of relocation strategies [7].

Over the years, developed countries have seen a decline of the weight of manufacturing on the economy. In the United States the manufacturing value added declined from 17 to 12 percent from 1997 to 2012. In Europe, the value generated by the manufacturing industry decreased from 18.5 to 15.1 percent, for the time period of 2000 to 2013. This decline resulted in the loss of almost 10 million jobs. Manufacturing is a key component for European development, since it represents 74.7 or exports, 63.8 or R&D and 60 percent in productivity growth [8]. In Italy, the decline was from 20 to 15 percent respectively. The UK experienced a decline from 18 to 11 percent, while Germany declined to 23 percent [9]. A country's wealth depends heavily on the manufacturing sector. The decline of the manufacturing sector in the developed world has a negative impact on the service sector as well, affecting the entire economy of the region. In addition, the manufacturing industry favors a fundamental part of innovation activities, which lead to an overall productivity growth and therefore to real income growth [10].

We define reshoring as the term that indicates the opposite decision of an offshoring strategy and define it as "the shift of production to the country of residence of the parent company" [11]. It must be mentioned that depending on the return procedure other definitions exist for

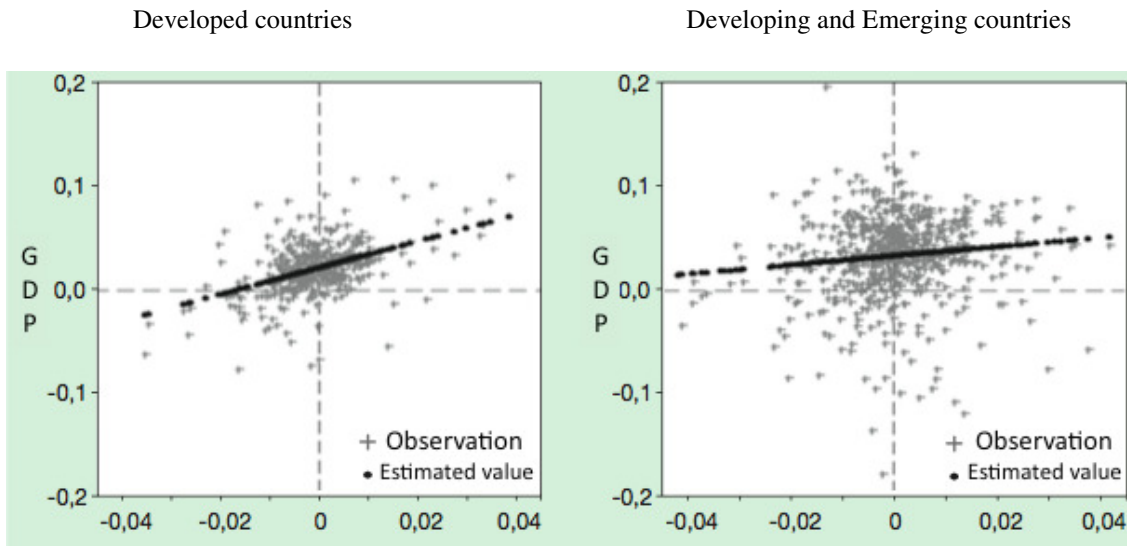
the process of reshoring, but they are not part of this analysis. Reshoring is not a new phenomenon, but has accelerated in recent years due to mainly economic changes in the host countries usually located in the developing world. Reshoring should not be understood as a phenomenon contrary to offshoring. The fact that some companies decide to return to their home countries does not imply that offshoring has been supplanted by reshoring. The two phenomena are independent from one another because they concern industries and companies at different stages in their life cycles using different strategies to be more competitive on the markets they serve. Many other critical variables have been identified (other than labor cost and labor flexibility) as relevant for offshoring. These are excellence in quality, branding, flexibility, speed in responding to customer/market needs and attention to ethics in the production process [12].

Manufacturing and Reshoring

The manufacturing industry is in a period of profound transformation, accompanied by uncertainty and resistance in dealing with necessary cultural changes induced by new technologies, unstoppable expansion of the service sector and the integration of global markets [13]. This is even more evident in the Italian market, where the most valuable feature is the “Made-in-Italy” world-wide recognition. Customers associate a higher value to the goods manufactured in their country of origin, and Italy has already gained recognition for many its manufactured goods [14].

In Italy, inadequate fiscal policies have contributed to the offshoring of the Italian manufacturing industry to low-cost production areas [15]. According to a 2013 study conducted by Confindustria, (the main Italian association representing the manufacturing and service industries), there is a positive relationship between higher manufacturing intensity and economic growth. According to CSC (Centro Studi Confindustria), the manufacturing industry is essential for economic development. The theoretical reason of the dynamic role of manufacturing as the engine of growth, expressed by Kaldor [16] is in its very nature of processing industry: manufacturing generates innovation demand. According to Confindustria higher demand for manufactured goods stimulates an increasing specialization of the same manufacture and allows to generate a growing disposable income in the economy. This additional income, turns into further increased demand for manufactured goods and determines a vicious circle process in which increased industrialization due to stronger economic growth and higher economic growth stimulate more industrialization [17]. The phenomenon, however, is not predictable. With the increase of disposable income, consumer demand tends to move away from increasing amounts of manufacturing goods to increased demand for services leading in this way, to slow the overall growth of the economy [18].

To test the effect of manufacturing on economic growth, the CSC estimated the relationship between the annual change in GDP and the corresponding annual change in the manufacturing share of the total economy, expressed in real terms. It was noted that a point increase in the share of manufacturing (in real terms) resulted in a GDP increase of about 1.5 percent point for the developed world while only a 0.5 for the developing world. No wonder the multiplier effect of manufacturing remains strong compared to any other sector.



(Figure 1. CSC elaborations on Global Insight data)

Reshoring in the US

The Reshoring Initiative, a US organization that monitors the reshoring phenomenon has recorded 357 cases of American companies reshoring. Their records show that by reshoring over 39,530 jobs have been created [19]. The Reshoring Initiative states that companies producing electrical appliances, textiles and clothing, metal products, and transport account for almost 50 percent of the companies returning home. The organization mentions that labor cost is not the only nor the main motivation factor determining the return of these companies. In the US labor costs have remained broadly unchanged since the year 2000, while in China they have quadrupled, they note. US companies are returning to America mainly thanks to incentives, the possibility of finding qualified workforce, and more importantly, due to the value of what “Made in America” represents.

A significant example of the return of the manufacturing industry to the US is represented by the giant Whirlpool as stated by Selko. In 2013, Whirlpool decided to reshore from Mexico and started producing washing machines for the American market in the US again. The reason for their return was mainly to respond faster to changes in demand. Another example is provided in the automobile industry [20]. The Ford Motor company has invested 1.6 billion dollars on its US facilities and is expecting to create 12,000 new jobs by 2015. Ford has already brought home some of its production from countries like Japan, Mexico and India. US multinationals have been influenced by the generous incentive packages provided not only by the federal government, but also by small local governments [21].

Reshoring in Europe

The data processed in the project Uni-CLUB MoRe Back-reshoring [22] indicated that in 2013, 145 instances of reshoring involved European companies. The instances were mainly related to Italian companies (in 60 cases), Germany (39 cases), France and England (20 cases each). Additional evidence of the advancement of reshoring is arising from the survey conducted by the Fraunhofer Institute for Systems and Innovation Research (ISI). The study comprised 3,293 companies from 11 European countries (Austria, Switzerland, Germany, Denmark, Spain, France, Croatia, Portugal, Netherlands, Sweden, Slovenia). Compared to the factors motivating American companies to reshore, European companies are reshoring mainly to improve product quality, achieve greater production flexibility and to provide faster response to changes in demand while offering more expedient product customization [23]. However, for any business that has reshored to their home country, about three companies have offshored. Consequently, unless Europe does not launch specific measures to encourage reshoring, reshoring will not be sufficient to aid in the revitalization of the European manufacturing industry significantly [10].

Reshoring in Italy

According to Cofindustri [17] Italian companies are now rethinking their selection of Eastern Europe and Southeast Asian countries, where they offshored, in order to reduce costs and gain some competitive advantage. Italian companies are re-discovering the strength of the “Made in Italy” slogan for industrial activities. China has experienced a reduction of Italian manufacturing on its territory, after being the main destination for Italian manufacturing. Other countries (as shown below) have seen a diminishing Italian presence.

Italy’s reshoring	Occurrences
China	21
Eastern Europe	19
Western Europe	10
North America	2

In Italy, the reshoring effort seem to be favored by some location advantages related to the availability of productive excellence [24]. In particular, preference is given to locations where local suppliers provide a comparative advantage in terms of high levels of flexibility and reliability in production, higher value-added functions, innovative capacity and cost competitiveness.

Reshoring Strategies in the US

Incentives and policy strategies are complementary. In the short term, incentives allow to attract companies persuading them to reshore while in the long term, the development of synergies in terms of innovation ensures the continuation of local advantages, which consolidate and strengthen the presence of reshored companies in their home territories. In the US, several strategies are being implemented at the Federal and State levels. At present, there are several Federal programs supporting and strengthening the US manufacturing

industry [20]. These programs range from tax benefits to incentives for technological innovation, support for training the workforce including support for some exports. In 2012, The Obama administration launched the “Blueprint for an America Built to Last” act, which is a multi-sectorial intervention package. The purpose of this act is to create new manufacturing jobs on US soil, while discouraging off-shoring through tax incentives, tapping synergies among universities and industry, research centers and business, and reducing the cost of energy. Another initiative launched during the Obama administration is the “Make it in America Challenge”, urging US companies to maintain, expand and/or bring home their manufacturing. Subsequently, these efforts should accelerate the creation of jobs while inducing foreign companies to implement business investment in the US [25].

The Department of Commerce offers the Assess Costs Everywhere (ACE) tool which can be used by companies to calculate their total costs and evaluate the profitability of a reshoring decision[26]. Another resource developed by the University of Michigan and funded by the Economic Development Administration (EDA) is the National Excess Manufacturing Capacity Catalog (NEXCAP) [27]. This catalog outlines unused production sites, provides data regarding specialized workers, local infrastructure, and other information that can help companies make manufacturing location decisions. The EDA [28] provides also the US “Cluster Mapping Project” with information about the business environment of individual American States. It provides State performance, demographics and geography, as well as a platform for debate about best practices in the field of economic development, innovation and policy. Another example of incentives favoring reshoring is the National Network for Manufacturing Innovation (NNMI) [28]. This network provides solutions to manufacturing problems related to innovation thanks to collaborative research between industry and academia. The goal is to create and develop new skills and/or innovative production processes, seeking to accelerate the commercialization of products in order to boost American companies’ competitiveness on the global market [29].

Individual States are developing strategies to make their areas more attractive to companies considering reshoring. The State of Pennsylvania launched the initiative “PA Made Again” with the purpose of creating new jobs through the preservation and expansion of the manufacturing sector [30]. The State of Mississippi together with Mississippi State University intend to strengthen the existing supply chains of their manufacturing sector, especially in the areas of automotive and furniture manufacturing. The initiative is expected to create jobs, improve professional training, promote exports and attract foreign direct investment. Finally, “The Select SC” is a program launched by Clemson University in South Carolina, focusing on improving in-sourcing, development and foreign direct investment [30].

Not only manufacturing companies are adopting measures to reshore. After decades of supplying the American market with low-cost goods from China and Asia, retailers such as WalMart have rediscovered the value of “Made in the USA”. Thus, WalMart has invited more than 500 American manufacturers to their headquarters in Bentonville, AR, with the intention of signing collaboration agreements. The goal is to re-position on the shelves of their North American stores products manufactured on American soil [29].

In 2010 “The Reshoring Initiative” [31] was born in Illinois with the goal to educate all interested audiences about how to bring back the manufacturing industry they once lost. The founder and president, Harry Moser, is adamant in his quest to promote the “Total Cost of Ownership” tool to all those considering offshoring. The TCO tool provides insight about many hidden cost, usually overlooked, when comparing the cost of domestic to foreign manufacturing. The TCO tool also shows the value of having products manufactured in America not only from a cost perspective, but also from the often neglected environmental perspective.

Reshoring Strategies in Europe

European policies in support of reshoring are not as developed as those implemented in the US. In order to revamp the declining manufacturing sector in Europe, the European Union is trying to provide new incentives to the manufacturing sector. These incentives have not yet been translated into actual industrial policies [32]. In Europe, reshoring is implemented independently, and at will, by each independent member state. The United Kingdom is the principal country to embrace policies that promote reshoring. The tools used by the British Government are legislative simplification, flexibility of the labor market, tax reduction on workers and companies, legislation to exempt foreign dividends of the resident enterprises from local taxes and to provide low-cost energy for both traditional and renewable sources over an extended period of time [33]. In addition, the British Government participates in the financing of the "Advanced Manufacturing Supply Chain Initiative (AMSCI)", a competition aiming to improve the competitiveness of British supply chains encouraging suppliers to relocate their manufacturing to the UK [34].

France is among the best examples in attracting investment thanks to various factors such as the best tax deduction in Europe for research and innovation. They also provide a reduction of 15 percent on corporate income tax; attractive tax incentives for financial companies and headquarters; exemptions for dividends received from subsidiaries and interest deduction on acquisition costs of subsidiaries or assets. The French Ministry for Industrial Renewal has also developed the Colbert 2.0 tool, inspired by the American Reshoring Initiative tool sharing the same goal of assisting companies to assess their own reshoring operations [35].

In 2013 the Dutch government created a special fund of 600 million Euro to support reshoring. The NFIA (Netherlands Foreign Investment Agency) assists companies in finding concessions and locations. The Netherlands has a competitive position, thanks to a reduced domestic delivery time, highly qualified workforce and automation policies that reduce the burden of labor costs on final products [33].

In Germany reshoring is indirectly supported by policies that increase location advantages and build sophisticated competitive advantages for the entire country system. In the past decades, unlike other European countries, Germany did not witness passively the de-industrialization and dismantling of its manufacturing sector. On the contrary, the German government has always recognized that in order to maintain their advanced economy and welfare system, they need to preserve their dynamic and highly specialized manufacturing industry. With this in mind two different strategies have been implemented: “High-tech

Strategy for Germany”, and “Germany as a Competitive Industrial Nation”. Both strategies aim to support innovation, promote technology transfer, increase the skills of the workforce and promote interaction between manufacturing and the service industry [36].

Reshoring Strategies in Italy

In Italy, the reshoring phenomenon has not yet reached the proportions observed in the US, where it is favored by industrial incentives and low cost energy, but it is nevertheless experiencing a growing trend. Unlike what has been discussed about the US, the reshoring of manufacturing to Italy is the result of an almost “spontaneous belief”, rather than an industrial policy. Reshoring is affecting sectors such as textiles and clothing, mechanics, pharmaceutical and biomedical and transportation industries. Companies reshoring are locating in all regions of the country and the majority are reported in the in the high-end manufactured goods, where quality is associated with the renowned “Made in Italy”, such as in fashion, clothing, footwear, furniture and automotive industries [37].

According to KMPG “Made in Italy” is a strong and worldwide recognized brand, an intangible heritage shared by Italian businesses; however, this advantage seems to lack the recognition and support it deserves from the Italian government. “Made in Italy” succeeds thanks to the commitment of individual companies and entrepreneurs. Institutions and politicians unconsciously reduce this unique advantage by creating barriers and obstacles for the further development of Italian manufacturing industries. Since the essence of “Made in Italy” is directly related to the intangibility of its name (image, design, creativity, innovation), a strategically viable choice should be to protect the “Made in Italy” brand, by maintaining the headquarters, development of product design, production coordination and quality control strictly in Italy [37].

Conclusion

As noted in the study of American reshoring, the participation of government at both national and local levels is crucial for the adoption of reshoring. Italy needs to follow this example, by legislating laws that attract the manufacturing industry back to Italy. The appropriate role of the government is to boost competitiveness among forces, as described in Porter’s diamond and not to create simple advantages consisting in short-term costs through incentive policies [38].

Emphasis should be given to the “Made in Italy” brand, which is already worldwide recognized. As in the US, Italy has a knowledgeable workforce, manufacturing capacity, and energy capable of hosting energy-intensive industries. Actions that support reshoring are within the scope of policy creation and context: reduction of bureaucracy, legislation on labor, management and supervisory processes; tax incentives (such the implementation of a flat-tax rate) and the de-taxation of profits reinvested in R&D. The partnership between industry, academia and the public sector as implemented in the US is an example of an effort towards the right direction. While, in recent years, in the US a better articulated policy strategy has emerged, European countries are still struggling to define an appropriate course

of action to respond to the current global competitive challenges they face. The return of manufacturing to Italy is still considered a remote possibility for most Italian entrepreneurs, mainly because there are still many problems to solve in relation to the political and institutional framework of the country.

In order to increase a national baseline of knowledge and potential for growth, support for education and the creation of university centers of excellence becomes crucial. Attention should be given to innovative start-ups devoted to advance manufacturing and improving global competitiveness. It is particularly relevant that all plans incorporate a progressive “fusion” of innovation and industrial policy. Networks promoting the transfer of technology from laboratories, universities, research centers to businesses must be put into place, as it is being done currently in the US. The analysis of Italy and the “Made in Italy” brand highlights an industrial policy with limited resources, characterized by a dispersion of forces with different objectives and without an institution or organization that provides central coordination. Italy must count with the direct intervention of the government, providing economic and fiscal incentives that represent an opportunity to expand the manufacturing sector on Italian soil.

As it has happened in other countries, Italy must begin this process by strengthening the collaboration of public and private sectors and by establishing centers of excellence. It is necessary to structure an “innovation system” of the public and private sector, that promotes a network of research centers, universities and businesses, highlighting specialization, innovation and participation of small and medium size enterprises in the process of generation and transfer of knowledge.

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