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Reshoring in Italy: a recent analysis

Giuseppina Talamo¹, Michele Sabatino¹

ABSTRACT

This paper contributes to the emerging literature on reshoring by analysing this return strategy in Italy with a focus on economic resilience. The joint analysis of reshoring and economic resilience is a missing link which could shed some light on the evolution of regional and international strategies and could help to understand whether there is a relationship between reshoring and the resilience of Italian industrial districts. In this regard, we intend to understand the behaviour of companies which have carried out reshoring strategies and their links with the territorial and regional area, and hence the economic resilience of the Italian regions in the face of most recent economic and financial shocks, which has contributed to these types of business and production choices. The aim is to demonstrate whether there is a relationship at regional level between companies which have made reshoring choices and the degree of economic resilience of an area. Using recent data, findings suggest that the renewal of supply chain strategy through reshoring can enhance the value of Italian production by a changing business model.

KEY WORDS: reshoring, back-shoring, back-reshoring, offshoring; resilience, productive district

JEL Classification: F2, F23, L10, O14

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1. Introduction

In recent years, the identification of the return strategies of the companies which had previously delocalized abroad has received wide attention, in particular with the beginning of the 2007-2008 crisis and with a general rethinking of the process of globalization. This paper examines the phenomenon and the effects of reshoring in Italy with a focus on industrial district and economic resilience. The joint analysis of reshoring and economic resilience is a missing link which could shed some light on the evolution of regional and international strategies and could help to understand

whether there is a relationship between reshoring and the resilience of Italian industrial districts. The answer to this questioning has important impacts both in terms of scientific analysis and in terms of policy decisions, given that for the policy maker the phenomenon of reshoring, in addition to being new, is seen as one of the engines of the growth and development at local level.

Despite this growing interest on reshoring, the empirical evidence and the availability of data do not provide univocal and detailed information on this phenomenon. In this paper we provide a new evidence on the Italian economic situation, still little analyzed from this perspective.

On how to define the strategic decisions connected to reconsideration or a change of the previous choices of offshoring, there is a wide debate which gave rise to a terminological confusion to

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classify and to describe the phenomenon in itself. The reshoring strategies in the country of origin, of production activities previously outsourced abroad, have been defined using several other terms: *back-shoring*, *reshoring*, *back-reshoring*, *near-shoring*, *on-shoring*, *in-shoring*. In this paper we use the term reshoring to define a strategic decision regarding the place where to move the production (De Backer, Menon, Desnoyers-James, & Moussiégt, 2016; Ellram, 2013; Gray, Skowronsky, Esenduran, & Rungtudanatham, 2013).

The international strategies of industrial districts have undergone a strong acceleration which, in some cases, has led to a deterioration of the territorialized supply chains and to a substantial decline of entire manufacturing sectors. Over the past two decades, big companies and small/medium enterprises started to shift their productions to the low-cost countries, following the offshoring strategy.

This strategy has been a significant change of production procedures such as globalizing international production and increasing the dependency of global supply of goods on the economic activity of other countries. Consequently, when it comes to manufacturing location decisions the companies have begun to pay more attention to unquantifiable factors such as the supply chain issue and strategic factors rather than simply relying on cost (Fratocchi, Di Mauro, Barbieri, Nassimbeni, & Zanoni, 2014).

In the economic and management literature the topic of industrial districts has had a wide diffusion, especially with previous knowledge on the relationship between the local and the global dimension of the districts industrial (Becattini & Rullani, 1993; Quintieri, 2006). The prevailing vision has always assumed which these perspectives could coexist and integrate: the local dimension would continue to favor and support the development of new knowledge and new specialized skills connected to the sectorial specialization of the industrial district. On the other hand, the global dimension would have represented both the diffusion channel of the district outputs, both the input of innovative inputs within the district.

In this paper we also consider the concept of resilience. The joint analysis of reshoring and economic resilience is a missing link which could throw light on the evolution of regional and international strategies

and could help to understand whether there is a relationship between reshoring and the resilience of Italian regions. The more districts show resilience and recovery capacity, the more reshoring strategies seem to be characterized by the ability of recovery. There has been a great interest in maintain companies' competitive advantages on this topic also due to the recent economic and financial crisis. However, the definition and measurement methods have not yet been defined uniquely. The scientific literature raises some questions, in fact, on the ability which a territory has, following an economic shock, returning to the pre-shock levels in terms of economic growth, production, employment or other target variables.

There is no unique definition of economic resilience and, as a result of this, there is no single way to identify the determinants and impacts. As part of economic and social disciplines, between multiple and more shared economic resilience definitions, we can mention the one adopted by the EU which defines it as the ability of a "system to withstand, absorb or overcome an external shock" and to maintain and/or return to the pre-existing state (ESPON [European Spatial Planning Observation Network], 2014).

The aim of this paper is to conceptualize reshoring as a possible step of the firm's internationalization strategy. We review the empirical literature on reshoring and we complement it with the findings of an extensive data collection. In addition, this paper seeks to reconstruct the evolution of industrial districts highlighting the differentiations strategies which are now consolidating in entrepreneurial paths internationalization, with particular reference to the emerging phenomenon of reshoring and the economic resilience.

The paper is organized as follows. In the next section an explanatory literature review has been conducted to provide a better understanding of the term reshoring. This work aims to clarify the terminological ambiguity which came about and discusses the determinants of this new phenomenon which are the center of a heated debate. Section 3 presents a detailed analysis on industrial reshoring in Italy. In section 4 we discuss the research framework and the relation between reshoring and economic resilience in the Italian regions. We conclude with a discussion of results and limitations.

2. Theoretical Background: Reshoring and Resilience

2.1. The concept of Reshoring

While theories on offshoring have been extensively discussed in the literature, the theoretical explanations on reshoring are more fragmented. Although offshoring has emerged as one of the most widespread strategies in order to maintain companies' competitive advantages, in recent years a counter trend has emerged: companies which had offshored their production, have started bringing production back (Di Mauro, Fratocchi, Orzes, & Sartor, 2018; Ellram et al., 2013; Kinkel, 2012). The manufacturing sector is witnessing a gradual change in the global supply chain configuration as some companies have repatriated their production to the countries of origin. As a result, new trend for reshoring manufacturing activities has emerged in which companies decide to bring once off-shored production, back to their home country (Gray et al., 2013).

Having considered which, in recent years, this has led companies, in addition to the phase of the offshoring, to consider some new phases, including the reshoring strategies in the country of origin of activities previously outsourced abroad. The same factors which, previously pushed to outsource production activities (the rising cost of labour, more costs of coordination and control, scarce quality of production processes, violation of industrial secrets), now seem to determine a new phase for the strategies of relocation of productions.

Reshoring could be related to a strategic decision of the companies, as a consequence of the complex process phase of the internationalization of companies, which over time has damaged the advantages of ownership, location and internalization, and which aims to re-organize production activities on safety procedures, high quality, proximity to customers, as an answer for new patterns in economic consumption (Benito, Petersen, & Welch, 2011; Fratocchi et al., 2014) or a mechanism to correct managerial mistakes made at the moment of the initial decision of *off-shoring*, as conceptualized by Kinkel and Maloca (2009); or an adaptation to new patterns in consumption matters, such as the *made-in* (Musso, Francioni, & Pagano, 2012). Ellram (2013) and Gray et al. (2013) define the return of production activities from the

host country to the home country having reference to *reshoring*, a term mainly used in the USA. Reshoring means a strategic decision regarding the place where to move the production. Holz (2009) underlines how, the concept of *back-shoring*, mainly used in Europe, cannot be meant as a disposal abroad or a divestiture, rather as the relocation of the company to the country of origin of value activities localized in international geographical contexts. It is about, therefore, a return of manufacturing activities in national factories owned by the company or carried out from suppliers present in the same country of the parent company. Kinkel and Zanker (2013), have conceptualized the aspect of the re-concentration as the production capability, which takes advantage from the benefits of the use of a higher production capability and a higher relation of variable costs, "correcting" the locality and focusing on how, for the re-concentration, it is necessary a previous production carried out abroad. The existence of *reshoring* cases also seems interesting for managerial implications.

A part of the literature (among other also Kinkel and Maloca, 2009) affirms which these choices are the consequence of some previous corrections of managerial mistakes regarding the decision to outsource production activities. Other authors (amongst others also Dachs & Kinkel, 2013; Fratocchi et al., 2015) state which, beyond the assumption of a mere correction of previous managerial mistakes, it may also take into consideration the deterioration over time of the existent conditions at the moment when the decision to outsource was made. Fratocchi et al. (2015) propose a definition of *back-shoring*, as a summary of theoretical concepts proposed in the academic and managerial fields: *back-reshoring*. Authors suggest a dynamic approach to international localization procedures of companies, and identify in the *back-reshoring* one of the phases of the development of manufacturing activity at international level.

The dangers of losing control of relevant information, the lack of adequate protection of intellectual property (Smith, 1996) and the difficulties in ensuring certain quality standards are just some of the factors which have led companies to review their strategies. According to McKinsey (The Economist, 2013), moreover, most companies did not pay enough attention to the localization of production and to the organization of the supply chain; but simply it was based on the pursuit of rivals,

who moved from one low-cost country to another. International delocalization is not always able to significantly increase profits and to create a competitive advantage over competitors. UNCTAD (2013), underlined the importance which this phenomenon is taking on (Ricciardi, Pastore, Russo, & Tommaso, 2015). According to De Backer et al. (2016), the phenomenon of reshoring needs to be put in perspective and claims which reshoring will result in a large number of extra jobs at home are not still supported.

Instead, reshoring leads to additional capital investment in the home country but also in neighbouring countries (nearshoring). Because of these extra investments, e.g. in robotics, the expectation is which reshored production will create only a limited number of additional jobs and which these jobs will increasingly be high-skilled. According to this conclusion, an alternative approach (Moradlou, Sawhney, Rapinder Sawhney, & Mountney, 2017) show which the jobs being brought back to developed countries are not essentially the same jobs which were previously offshored. Moradlou et al. (2017), claim which reshoring can provide a platform to utilise the new generation of technologies through postponement strategy. The only way for a long lasting and a sustainable reshoring strategy is through a fundamental transformation of the current industrial environment (Moradlou et al., 2017). Meanwhile in Moradlou et al. (2017) the lack of production and delivery responsiveness is the primary reason behind the reshoring phenomenon. This indicates the potentials to utilise new technologies to overcome the issues related to responsiveness. Therefore, manufacturing sectors are required to adopt modern technologies, intelligent robotics, big data and Internet of Things, by which industries will ensure their competitive position in the market. In this context, considering the Italian situation, Fratocchi (2014) claim which the needs of production 4.0 will give a strong acceleration to the reshoring phenomenon in the coming years.

2.2. The concept of Resilience

No consensus exists on a univocal definition of resilience nor on an approach to its main drivers and effects (Martin & Sunley, 2013). Etymologically, “resilience” comes from the Latin verb *resilire*, which is, to rebound. The term was first applied to engineering and ecology in the scientific field. The first definition de-

scribes resilience as the speed with which a system returns to the previous position after a disturbance (Holling, 1973; Pimm, 1984; Walker, Gunderson, Kinzig, Folke, Carpenter, & Schultz, 2006).

For this, the system has to be able to reach an equilibrium by itself: every shock which leads a system to a situation of no equilibrium also causes the system to initiate a series of mechanisms to come back to the equilibrium before the shock. Therefore, a system which is more resistant to shocks or which quickly returns to its pre-equilibrium shock is considered to be more resilient than a system which, when subjected to the same shock, not only has a much more pronounced reaction to it, but also requires more time to return to its steady state (Martin, 2011).

Ecological resilience (Holling & Gunderson, 2002; Gunderson & Pritchard, 2002; Holling, 1996; Walker et al., 2006) is the ability of a system to absorb a disturbance without changing its structure, identity, and functions. In this case, the focus is on the stability of the system and the size of the shock, which may be faced before the system moves to another state; in other words, ecological resilience refers to “the capacity of a system to absorb disturbance and reorganize while undergoing change so as to still retain essentially the same function, structure, identity and feedback” (Walker et al., 2006). The ecological approach is used in a context of adaptive cycle, within the regional sciences.

Holling (1973) developed the concept of ecological resilience drawing from Odum’s studies and through a thorough analysis of complex systems and adaptive behaviors. Holling describes Social Ecological System resilience as the capacity of systems to evolve, because of a disturbance, to multiple states different from the one before the disturbance while keeping the essential functions and restoring the structures which distinguish them. According to this approach, the resilience of a system is its ability to bear a disturbance, contrasting the consequent increase of entropy. This ability lets the system reach a different equilibrium system, generally inferior, with a different composition of the processes. In a resilient system, change can create opportunities and development: the system cannot only recover, with time, a situation identical or similar to the previous one but, through the learning processes, it can also introduce variations producing important and positive innovations.

Table 1. Resilience and systemic vulnerability

Approach to the study of resilience	Focus
Engineering	Ability of a system to return after the disturbance to the original equilibrium. The focus is on the condition of stability around the equilibrium point (Odum, 1965)
Ecological	Quantity of a disturbance a system can absorb before falling in a condition of equilibrium of inferior level, governed by different set of processes. The focus is on the behavior of the system "oriented to equilibrium." The approach implies the existence of multiple equilibriums (Holling, 1973)
Adaptive system (socio-ecological)	Ability of the system to advance the change as a consequence of an unforeseen event to minimize the negative impact. The focus is on the adaptive abilities of the system and the learning mechanism (Folke et al., 2010)

The third and last concept, adaptive resilience, is defined as the ability of a system to react to stress without losing the capacity to allocate resources efficiently (Perrings, 2006). The concept of adaptive resilience, within the Evolutionary Economic Geography theory, may be interpreted in terms of regional economy as the ability of the different regions to withstand the changes and the shocks in a competitive market focusing on the dynamic of the process and the movements developing with time (Sammie & Martin, 2010). In other words, it refers to the ability of recovering after a shock as well as the ability to re-set its growth (Hill, Wial, & Wolman, 2008). A resilient region is virtuous and successful in time and is able to adapt its ways of growth. Repositioning and reorganization allow the region to change its way of growth when necessary (Christopherson, Michie, & Tyler 2010). This type of resilience requires adaptability and adaptation to the changes of the territory. The elements which make a region adaptable are a strong regional system of innovation (Clark, Huang, & Walsh, 2010), learning capability (Archibugi & Lundvall, 2001), the presence of competitive infrastructures and transports, a labor force with a good education level, a financial system which supports enterprises, and a diversified industry.

The resilience of a region or territory is, therefore, the ability of a local and regional economy to modify its own industrial, technological, institutional structure according to the change. If the shock is strong enough, it may alter the behavior of the economic fac-

tors, change the economic system, and move it to other directions (Pendall, Foster, & Cowell, 2010). Resilience is as high as the ability of the system to react to the shocks with creativity and flexibility (Pendall et al., 2010), which depends on the innovative abilities of the enterprises, the ability of the enterprises to create new opportunities, the structure of the credit market, institutions' innovation, and on individual and community innovation and flexibility.

Table 1 presents Martin's (2011) explanation of theoretical evolution from engineering interpretation of resilience and vulnerability to an ecological and finally systemic adaptive interpretation.

Nowadays, resilience is used in a variety of discipline fields despite the lack of a unique definition (Christopherson et al., 2010). In fact, the difficulty of interpretation derived from the use of related concepts such as learning region or adaptability stimulates a wider a multidisciplinary scientific debate regarding theory and empirical studies dealing with the measurement of the phenomenon under analysis.

The concept which is closest to this study's research objectives is economic resilience. As part of economic and social disciplines, the definition provided by the EU is noteworthy: Economic resilience is the ability of a "system to withstand, absorb or overcome an external shock" and to maintain and/or return to the pre-existing state (ESPON, 2014). Therefore, it refers to the economic flexibility to change, adjust, and adapt to a shock (Capineri et al., 2014).

Until recently, studies on resilience had not been used widely in regional economic literature and, where present, had been limited to developing countries (Graziano, 2012). Briguglio (2003) states the "Paradox of Singapore," which refers to the economic development of a number of small countries (Singapore and the islands of Malta and Cyprus). According to the author, despite its small territorial size and the high exposure to external shocks (high vulnerability), the economies of these small states are able to achieve and sustain significant levels of economic growth thanks to their resilience. However, following the financial and economic crisis of 2007 and the rough handling due to the globalization and international competition, a new line of study both in regional economy and in the entrepreneurial and business systems has emerged. This research focuses on understanding how a territory and its businesses can react to strong economic and social stresses. Considering the level of risk which characterizes the current era, it is important to understand how and why some regions are more successful than others in overcoming critical situations. Unlike an economically resilient system, where change has the ability to renew and introduce positive innovations, non-resilient systems have a high risk related to negative impacts arising from unexpected shocks due to their vulnerability.

The literature on economic resilience has also highlighted the role of the composition of the production fabric. In general, regions with a diversified economy are considered less vulnerable to external shocks than some areas in specialized sectors. The factors which could explain the different ability of the territories to adapt to external shocks include the innovation system, institutions, and entrepreneurship; however, the list of possible determinants of resilience of an area is potentially very long (Dal Bianco, 2015). Furthermore, the lack of consensus on a definition of economic resilience leads to a variety of approaches to identify its determinants and effects.

3. Reshoring as a new strategy?

The *reshoring* phenomenon is also of interest to the Italian production system, characterized more in general by significant reconsiderations of the production models and internationalization strategies also as an answer to the recent crisis. In this paragraph, an overview on its diffusion, with a reference to the most significant company cases interested in adopting strat-

egies to repatriate the production activities based on the available information deduced by available sources, will be provided. (Centro Europa Ricerche, 2015; Uni-Club More Back Reshoring, 2014; Fratocchi et al., 2015; KPMG, 2015; PricewaterhouseCoopers [PWC], 2014).

According to Becattini and Rullani (2003), the traditional model of the Italian district consists of agglomeration in small areas of many small businesses, each specialized in a phase and interpenetrated with the others in order to establish a local manufacturing supply chain. In analyzing the dynamics and evolution of all strategies of offshoring adopted by Italian companies, it is possible to distinguish two strategies. The first one concerns offshoring of some processing phases to achieve certain components or work in some European countries (Central and Eastern Europe). The second strategy is focused on manufacturing investments in South-East Asian markets, with particular reference to China and India. However, both strategies are not risk free. For example, analyzing the South East Asian market, it has witnessed an increase in labor costs, currency uncertainty, high costs for monitoring manufacturing and distributing activities. These represent some determinant of reshoring. Then, the same factors which, previously pushed to outsource production activities (the rising cost of labor, more costs of coordination and control, scarce quality of production processes, violation of industrial secrets), now seem to determinate a new phase for the strategies of relocation of productions.

These analyses confirm which, in general, reshoring could be related to a strategic decision of the companies, as a consequence of the complex process phase of the internationalization of companies, which over time has damaged the advantages of ownership, location and Internalization, and which aims to re-organize production activities on safety procedures, high quality, proximity to customers, as an answer for new patterns in economic consumption (Benito et al., 2011; Fratocchi et al., 2014); or a mechanism to correct managerial mistakes made at the moment of the initial decision of *off-shoring*, as conceptualized by Kinkel and Maloca (2009); or an adaptation to new patterns in consumption matters, such as the *made-in* (Musso et al., 2012).

Recent studies on reshoring, focus on companies operating in the Textile, Clothing, Leather and Footwear Industry (TCLF), whose products are often sensitive to the "Made In" effect, a frequent motivation

Table 2. Reshoring motivations

Motivations	Decisions	% on decision choices
Effect made in	42	41,6%
Improving customer service	25	24,8%
Delocalized production quality	18	17,8%
Global corporate reorganization	15	14,9%
Global economic crisis	14	13,9%
Focus on product innovation/process and closeness Production/Research	13	12,9%
Logistics costs	13	12,9%
Total costs	10	9,9%
Local RU inadequacy	8	7,9%
Social pressures country of origin	8	7,9%
Differential labor cost	6	5,9%
Country-of-origin production capacity availability	6	5,9%
Decisions without a reasoned statement	20	
% on total decisions	16,5%	

Source: Adapted from "Indagine esplorativa sulle strategie di (ri-localizzazione delle attività produttive nel settore calzaturiero italiano [Exploratory survey on the strategies of re-localization of production activities in the Italian footwear sector]" by UniCLUB More Back Reshoring (2014). Retrieved from https://www.ilsole24ore.com/pdf2010/Editrice/ILSOLE24ORE/ILSOLE24ORE/Online/_Oggetti_Correlati/Documenti/Impresa%20e%20Territori/2014/11/indagine-calzaturieri.pdf

which pushes companies operating in these areas to return (Fratocchi *et al.*, 2015).

Analysing the Italia context, we can see which the *made in effect* has a crucial role. Companies come to Italy for reasons related to product quality and factor *Made in Italy*. They decide to start reshoring operations, to rely on Italian suppliers, much more reliable and competent than Chinese rivals, for example. In Italy, they can rely on skilled craftsmen, who can get a high-quality product. For this reason, many companies have come up with the production of high-end lines to exploit the "made-in" factor and get a higher premium price. Another reason is the firm's global reorganization. In this macro group of motivations we can also include Market. Companies start reshoring operations to better manage important markets or to follow customer preferences on made in Italy. The so-called time to market is a very important factor, but long shipping times did not allow this advantage and

provide adequate customer service. Crucial is also the reason related to efficiency in order to get a better result in innovation and not waste resources. Another crucial variable which has emerged in these last decades is labour costs. According to Fratocchi *et al.* (2013), reducing labour cost differential in relocation countries encourages companies to repatriate their productive activities in their home country, especially if supported by tax cuts in recruitment in Italy. Logistics costs represent also one of the main reasons of reshoring: companies are pursuing a logic of reducing transportation costs, but also to avoid delays in delivering goods and improve customer service. Related to the previous reasons it is interesting to analyse the role of know-how in the country of origin. Finally, a new and recent reason of reshoring is represented by the recent economic crisis: according to Uni-CLUB MoRe, from 1997 to 2013 the production lines reported in Italy were 79, most of which in the last five years.

According to Uni-CLUB MoRe Back-Reshoring, 2016 analysis, the reasons which push Italian companies to reshoring, *made-in* is the most frequent reason (42%). Instead, the 25% the necessity of more attention to the customer's needs; 18% quality of production in delocalised countries; 8% the social pressure of the country of origin; 14% regards all decisions after the recent crisis; 6% the highest level of competences of the workers of the country of origin; 6% the reduction of the difference regarding the labour cost. In relation to repatriation in Italy, the logistic costs and production costs seem to be negligible (13%), on the contrary of what happens at global level, and in particular in the USA. This can explain the elevated gap in terms of labor costs of our country compared to those of traditional outsourcing (Uni Club More Back Reshoring, 2014).

These data, confirm, which, there are different reasons which pushed Italian companies to adopt reshoring strategies: not only economies of scale, studied advantages and global planning networks, production and distribution through the insertion of the companies in value global chains extended to more countries and markets, coordinated by multinational companies (Coe, Dicken, Hess, & 2008; Gereffi & Fernandez-Stark, 2011), but also other forms like, to be competitive oriented on high quality, innovation, safety and *made-in*. In the end, also redundancies of personnel and the availability of unused production in Italy have been, at times the motivation to adopt reshoring strategies, especially when labour unions agreed to increase the production per hour worked (Fratocchi et al., 2015).

Considering the specialization sectors of Italian companies it comes to light which, as it happens at global level, in Italy the sector where more cases of reshoring occurs are those textile-clothing and footwear (43%). 12% is represented by the automotive sector, 18.6% electric, electromechanical and electronic. 5,8% furniture and household appliance; while biomedical, cosmetics and mechanical count only 4,7% of the reshoring cases, even less (3,9%) heavy goods vehicles, food, pharmaceutical, textile and toys (1,2%). From the data it emerges which 33% of Italian companies which adopted *reshoring* strategy had outsourced their own activities in China, 24% in the Eastern Europe and in Russia, 3.3% Africa and Middle East countries, 1.7% in North America and 12.4% in other Asian countries (UniClub More Back-Reshoring, 2014).

In Italy, a further increase of the phenomenon is due to the imitative effect of *reshoring*. When some companies, increasing the use of local suppliers, have noticed which many customers/ competitors had already moved their productions back to the country of origin, or sought productions made in Italy, have re-evaluated the link with the territory of origin. Therefore, the start of reshoring flows of productions outsourced abroad had pushed several companies, specialized in certain kind of activities carried out behalf of big Italian brands, to back-shore their production to the country of origin (Williamson, 2012).

Considering the geographical location, it comes to light which reshoring strategy in Italy mainly concerned the northern regions (97 decisions on 123), first of all Veneto (36), Emilia-Romagna (22) and Lombardy (18). At macro area level, the north west has involved 43 companies which mainly back-shored from China and other Asian countries, while North East 36, mainly coming from Eastern Europe and the Balkans. In central and southern Italy, instead there are few cases. The companies which have back-shored their productions to the central regions are 17: 7 in Tuscany, 7 in Marche, 2 in Umbria and one in Lazio. Reshoring has interested 5 companies from the South of Italy: 2 in Apulia, 2 in Campania and one in Abruzzo; Sicily and Sardinia are not available (UniClub More Back Reshoring, 2014). At the macro-area level, the North-West has attracted 52 companies returning mainly from China and other Asian countries. The Centre and the South, on the other hand, have few cases (European Foundation for the Improvement of Living and Working Conditions [Eurofound], 2013; Uni Club More Back Reshoring, 2014). These data show which the *gap* between North and South, in company reshoring procedures cannot be taken into consideration. This confirms the close relationship between the geographical distribution of investments and the one related to reshoring. These data show which the gap between North and South may not be taken into accounts, even in companies' return processes. This confirms a close correlation between the geographical breakdown of foreign and reshoring investments.

Considering these recent data, we can conclude which in Italy, to facilitate reshoring phenomenon little has been done. The important trade associations, in particular in the sectors of fashion and footwear,

Table 3. Reshoring in Italian Regions

Geographic area	Regions	Rehoring	Tot
North West	Emilia Romagna	22	52
	Lombardia	18	
	Piedmont	7	
	Liguria	5	
North East	Veneto	36	45
	Friuli Venezia Giulia	6	
	Trentino Alto Adige	3	
Center	Marche	9	22
	Tuscany	9	
	Umbria	2	
	Lazio	1	
	Abruzzo	1	
South	Apulia	2	4
	Campania	2	
tot		123	123

Source: Adapted from "Indagine esplorativa sulle strategie di (ri-localizzazione delle attività produttive nel settore calzaturiero italiano [Exploratory survey on the strategies of re-localization of production activities in the Italian footwear sector]" by UniCLUB More Back Reshoring (2014). Retrieved from https://www.ilsole24ore.com/pdf2010/Editrice/ILSOLE24ORE/ILSOLE24ORE/Online/_Oggetti_Correlati/Documenti/Impresa%20e%20Territori/2014/11/indagine-calzaturieri.pdf; "Monitoring and managing restructuring in the 21st century (ERM Annual Report 2013)" by Eurofound (2013). Luxembourg: Publications Office of the European Union. Retrieved from http://csdle.lex.unict.it/Archive/LW/Data%20reports%20and%20studies/Reports%20and%20studies%20from%20EUROFOUND/20131213-120956_ERM2012dec13pdf.pdf

have been asking for a long time to put into effect the planned tax reforms, regarding IRAP and hiring in order to facilitate the reshoring. One of the main reasons of reshoring for Italian companies is the *made in Italy*. In this regard, it has been recognized as a central role to consumers and international markets because of an increasing demand of productions completely *made-in Italy* (Musso et al., 2012). The necessity of more attention to customers' needs has, pushed companies to reconfigure their *supply chain* (Baldassarre, Salomone, Santovito, & Silvestri, 2014) on an international scale, also because of the pressure caused by the crisis. Italian companies which have adopted reshoring strategies

mainly connected to the added value of *made in Italy*, require, also, an improved legislation regarding the certification of the origin of the productions, which could guarantee a greater protection of the *made in Italy*.

This graph shows how the Italian companies which make up the sample are pushed, in 57% of cases, by reasons related to the Made in Italy factor and to the quality of the product. Luxury and high-end fashion falls into the market segment of brand equity. In this regard, there are a number of critical success factors to be considered; namely, style and design excellence, country of origin (the made-in effect), the coherence between brand value/reputation and product unique-

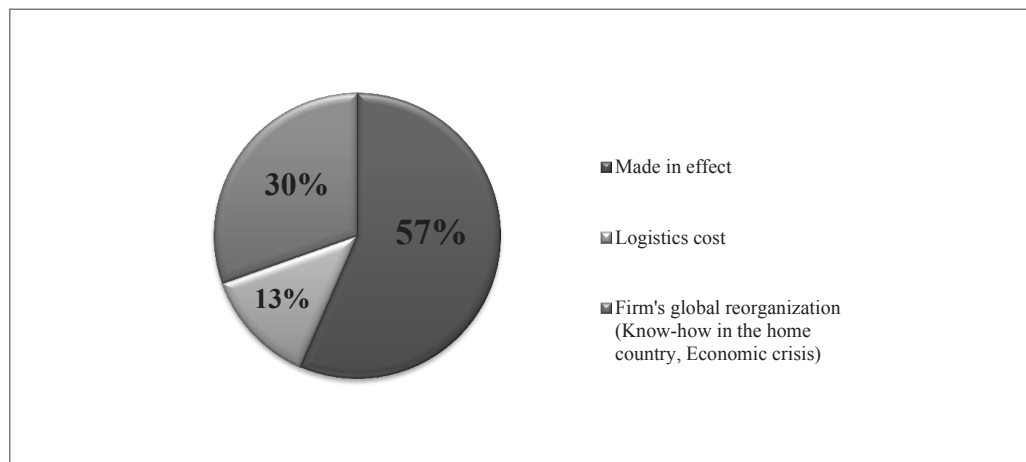


Figure 1. Sample Reshoring reasons

ness which conveys appropriate emotional appeal needed to satisfy customers and superior product quality (Brun et al., 2008). For example, Louis Vuitton's repositioning of itself as a luxury brand was accomplished. It outsources the manufacturing of other products to other Italian firms in the same district in order to preserve the authenticity of 'Made-in-Italy' label Kim (2013). The 30% of the companies which make up the sample, instead, adopted the reshoring strategy following a corporate reorganization in terms of market, efficiency and reduction of the labor cost differential in the countries of offshoring (Fratocchi et al., 2013). For example, Mediolanum Farmaceutici which left France, to concentrate production in Lombardy and Felm which decided to bring the production back to Italy to bring it closer to the research centre is to develop and allow a more accurate design. Finally, for the 13% of the Italian companies which populate the sample, the movement of activities to reduce logistics costs derive from the need to reduce transport costs due to an extensive supply chain, reduce delivery times (internal environmental factor), or from specific factors of the country (customs duties).

In addition to these, the logistics includes different items of expenditure such as information management, warehouse management and transport costs, which are amplified when the value chain is located

in geographically and culturally very different areas, as are the Europe, the United States and Asia. In this way there are increases in transactional costs, coordination and monitoring, as well as problems related to the unmotivated personnel after the dismantling of the company's internal structure; as a whole these can significantly erode the presumed cost advantages, thus pushing companies to reconsider their allocation choices. For example, Bonfiglioli Italia and Beghelli, come back to Italy because of logistics costs. Beghelli since 2013 has started to disinvest in the Czech Republic to bring production back to the Bologna area, mainly due to logistical problems which have become progressively more significant due to the slowdown in the market.

Recently some initiatives have been promoted in order to support Italian companies which want to pursue a reshoring strategy. In this regard it is interesting to analyze the "Project *reshoring*", which came about from the collaboration between "Sistema Moda Italia" (SMI) and PwC Advisory, which it is oriented to create the necessary conditions to back-shore the productions and to increase the productivity in two pilot areas, Veneto and Apulia. The project aims to promote assistance to companies, re-qualification and education through an Academy but also to collect acceptances by those companies, and mainly by PMI, which intend to

carry out *reshoring*¹. SMI has created new contacts with the manufacturing companies and it controls the state of the project in order to expand it to other Regions. The district of the production chain relative to Veneto has been chosen for several companies present both upstream and downstream of the sector: the production chain is made up of clothing companies, textile, third party companies, machinery and material suppliers, service suppliers, wholesalers and distributors as well as intangible services. Apulia, represents, instead, the first southern region in textile-clothing, both for the number of active companies and for the number of employees (footwear in the North of Bari, Clothing in Bari, Hosiery and Clothing in Salento, footwear of Casarano) which boast handcrafted excellence. The Apulia Fashion District, has been affected by the recent economic negative phase, which has caused a great weakening and it aims, through “Project *reshoring*”, to contribute to backshore production in Apulia and activate a virtuous circle in order to expand the project to other regions. The “Project *reshoring*” will work by educational interventions and re-qualification of personnel, supporting investments regarding R&S in order to give a concrete result to reach the recovery of the territory. Another example of initiatives to facilitate reshoring is represented by “Laboratorio Moda Molise”², which aims to give value and guarantee scientific, professional, and manufacturing competences of the *made in Italy* sector through instruments and policies of traceability and certification, as well as to promote company cooperation by means of contact and collaboration also with national and international authorities. The Region of Molise has also signed a protocol of partnership with “Missardi L.t.d”, a company *leader* in the fashion industry, in order to re-launch the sector with *made in Italy creations*.

4. Methodology and Hypothesis

Once analysed the main reasons and recent data on reshoring strategy it is possible to bring new elements of discussion to the debate on reshoring with particular attention to the dynamics of industrial districts and the role economic resilience. Based on these analyses, it is presumable to conclude which there is no a single strategic conduct but which there is a growing differentiation of the internationalization paths related to the economic resilience of the district companies.

The concept of resilience which is closest to our research objectives is referred to which of economic resilience. As part of economic and social disciplines, between multiple and more shared economic resilience definitions, we can mention the one adopted by the EU which defines it as the ability of a “*system to withstand, absorb or overcome an external shock*” and to maintain and/or return to the pre-existing state (ESPON, 2014). Then it refers to the economic flexibility to change, adjust, adapt later to shock (Capineri et al., 2014). Studies on resilience, until recently, had not been used widely in regional economic literature and, where present, had been limited to developing countries (Graziano, 2012). Briguglio states in 2003 the so-called “*Paradox of Singapore*”, referring to the economic development of a number of small countries (Singapore and the islands of Malta and Cyprus). According to the author, despite its small territorial size and the high exposure to external shocks (high vulnerability), the economies of small states observed are able to achieve and sustain significant levels of economic growth thanks to their resilience. Only now, following the financial and economic crisis of 2007-2008 and the rough handling due to the globalization and international competition, has developed a line of study both in regional economy and in the entrepreneurial and business systems, able to understand how a territory and its businesses can react to strong economic and social stresses. Considering the level of risk which characterizes the era in which we live, it is therefore important to understand how and why some regions are more successful than others to overcome moments of difficulty and crisis. Unlike an economically resilient system, where change has the ability to renew and introduce positive innovations, non-resilient systems, so vulnerable, have a high risk related to negative impacts arising from unexpected shocks.

The purpose of our analysis is to verify the role of the economic resilience of Italian enterprises which had, in a first step, initiated delocalization processes and, in a second step, had contributed to the reshoring phenomena. In this regard, we intend to understand the behaviour of companies which have carried out reshoring strategies and their links with the territorial and regional area, and hence the economic resilience of the Italian regions in the face of most recent economic and financial shocks, which has contributed to these types of business and production choices. The aim is to dem-

onstrate which there is a relationship at regional level between companies which have made reshoring choices and the degree of economic resilience of an area.

As presented in the previous section, data show and confirm divisions between the regions of the North and the regions of Southern Italy, but also some concentration in three regions of Italy which represent territorial areas rich in district and network experiences. At the same time, agreeing to the validation of the study of Lagravinese (2015), a measure of economic resilience is shown which can represent the reactions of the Italian regions at different stages of the most recent economic crisis using a relevant indicator such as the rate of employment. By defining an economically resilient region, the one which can, following a shock, on the old growth path or find it new in a relatively short period of time, has emerged which there are Italian regions which reacted more resiliently to face with the economic shocks and much less resilient regions. Following recent literature suggestions which highlight the difference in the range of economic and social resilience capabilities which may vary considerably to the reshoring phenomenon in different Italian regions, this result was used to study whether the regions which had a lower employment decline, but above all, increased resistance and recovery capacity were also those characterized by recent phenomena of repatriation of productive activities. If the hypothesis is confirmed, it can be concluded which regions reporting significant reshoring phenomena are those which have reacted more resiliently than others. Initial hypotheses, however, were only partially confirmed. The analysis has shown which only for some regions there is a significant correlation between the economic resilience index and the reshoring phenomena. Regions with a higher level of resilience are those who reacted better to the latest economic shocks and also show significant returns experiences of production activities. However, there are also some regions which, despite the significant presence of resilience, have failed, like the others, to convince the business system to repatriate activities and productions. We can conclude which the presence of a capacity to resist and, above all, regenerate at the regional level it is necessary but not an indispensable element of the reshoring phenomenon as in the business-level, the production and location choices also contribute to other dimensions of

other nature referring, for example, to the country of delocalization of the initial introduction, to the international and national development, to the productive and entrepreneurial characteristics of the company, to the degree of openness and innovation or to other institutional and political dimensions.

5. The results of analysis

According to our main hypothesis, the more regions show resilience and recovery capacity towards of the recent economic crisis, the more reshoring phenomena seem to be able to recovery. The table below summarizes data from regions which have identified reshoring phenomena, companies which have in the past relocated their production activities, and the resilience values of Italian regions by highlighting those which show positive values of reshoring and resilience.

From the table above emerges an articulated framework in which the presence of a degree of significant resilience certainly represents a major element in possible reshoring decisions. The analysis shows which there are 62 cases of reshoring entrepreneurial decisions in the presence of regional resilience capacities above 0, and with values from 0 to -1 there are 47 cases of reshoring. With values below -1, there are only 15 cases with some regions where even reshoring experiences (Sicily, Calabria, Sardinia) are not known.

We can see how different endowments of economic and social resilience can compete with reshoring decisions in the various Italian regions and we can divide Italy into three macro-regions where the various Italian regions are analysed in terms of reshoring and significant resilience. In this geographic and economic sub-division we can distinguish: (i) a first group of regions which have achieved positive results both for resilience and for reshoring phenomena; (ii) a second group which, while being non-resilient, has detected some reshoring phenomena; (iii) a third group of regions showing negative results for both economic resilience and reshoring values. The table below (Table 3) shows the articulation of the three geographic areas.

Analysing the results we can see there are some regions which did not achieve satisfactory results in both measurements are those of dark grey colour, ie. Sicily, Sardinia, Calabria, Piedmont, Umbria, Friuli Venezia Giulia. The other group of regions, with the exception of Emilia Romagna showing a significant number of

Table 4. Reshoring and Resilience

Regioni	Reshoring Decisions	Index of Resilience
Apulia	2	1,75
Abruzzo	1	1,69
Trentino Alto Adige	3	1,27
Valle d'Aosta	0	0,75
Lazio	1	0,54
Veneto	36	0,41
Lombardia	18	0,24
Molise	0	0,10
Liguria	5	-0,11
Emilia Romagna	22	-0,19
Campania	2	-0,41
Tuscany	9	-0,49
Basilicata	0	-0,60
Marche	9	-0,62
Piedmont	7	-1,04
Sardinia	0	-1,12
Calabria	0	-1,20
Umbria	2	-1,28
Sicily	0	-1,54
Friuli Venezia Giulia	6	-2,00

Source: Adapted from "Indagine esplorativa sulle strategie di (ri-localizzazione delle attività produttive nel settore calzaturiero italiano [Exploratory survey on the strategies of re-localization of production activities in the Italian footwear sector]" by UniCLUB More Back Reshoring (2014). Retrieved from https://www.ilsole24ore.com/pdf2010/Editrice/ILSOLE24ORE/ILSOLE24ORE/Online/_Oggetti_Correlati/Documenti/Impresa%20e%20Territori/2014/11/indagine-calzaturieri.pdf "Monitoring and managing restructuring in the 21st century (ERM Annual Report 2013)" by Eurofound (2013). Luxembourg: Publications Office of the European Union. Retrieved from http://csdle.lex.unict.it/Archive/LW/Data%20reports%20and%20studies/Reports%20and%20studies%20from%20EUROFOUND/20131213-120956_ERM2012dec13pdf.pdf

reshoring experiences, are regions which we can call "bearings" between those which show totally negative results and those which have positive performance for both values. The figure also shows which there is no geographical continuity between the Italian regions

and reshoring and resilience experiences take on relevance in decisions but not in an exclusive way. There is not a territorial dualism but it is possible to underline a diversification from one extreme of the country to the other. Finally, these data seem to confirm, in an

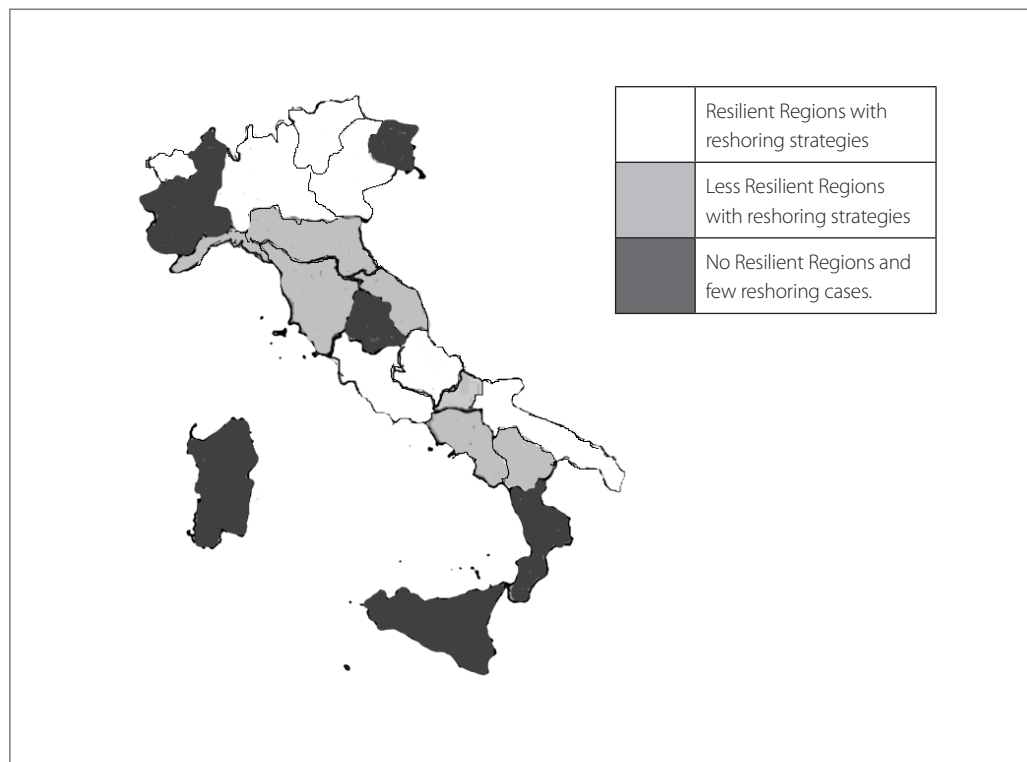


Figure 2. Italian Regions: Economic Resilience and Reshoring attitude

entirely embryonic manner and with the necessary specifications on the level of individual entrepreneurial experiences, the initial hypotheses of a direct relationship between resilience and reshoring decisions. These first results need further insights through even micro analysis.

The results of the research show, however, which in some regions there is a relationship between the economic resilience index and the reshoring choices of businesses, pointing out which the territorial element is a major indicator in entrepreneurial choices. Regions with a higher level of economic resilience are the ones which reacted better to the latest economic shocks, confirming an entrepreneurial fabric and an even more competitive edge. We can therefore assert which resilience at regional level is a necessary but not indispensable element for investment return decision-making. Certainly, in addition to the resilience and re-

covery of territories at regional level, other dimensions are also relevant, such as the characteristics of the local productive and entrepreneurial system, the degree of openness and innovation of the local economy or other dimensions more explicitly sectoral and entrepreneurial. Ultimately, despite the fact which there is an exclusive and direct relationship between reshoring and resilience, the latter is still one of the important elements to be considered in the regional economy and entrepreneurial and sectoral choices, especially in those areas which show presence of significant manufacturing and manufacturing districts and / or clusters.

6. Conclusions

The main results of our study should be viewed in the light of the relation between reshoring and resilience in the Italian regions. The analysis presented in this paper, starts from an analysis of the main literature

regarding the *reshoring* phenomenon. The increasing attention on *reshoring* phenomenon by the scientific community and *policy makers* will involve a revision of traditional business models both for policy implications, and for managerial strategies to adopt and this represents an occasion to rethink on the sector and on the sustainability and in order to re-qualify Italian productions. At the end of this research we can conclude which the presence of resilience is definitely needed but not indispensable for recognizing a correlation with entrepreneurial decisions and reshoring. While acknowledging the importance of the link between regional resilience and reshoring decisions, this research does not, therefore, demonstrate the exclusive existence of a direct link between the presence of resistance and recovery capacity on the territory of asymmetric shocks to the economy and the increasing number of decisions made by Italian companies to repatriate part or all of the delocalized investments. Rather, the proposed scheme confirms the existence of a general relationship between economic resilience and reshoring phenomena but not exclusively.

However, this analysis can contribute to the definition of some context policies which can help the recovery of productive activities and regional economies affected by the economic and financial crisis also through reshoring. In Italy, to date, little has been done for the reshoring phenomenon. The most important category economic associations, particularly in the fields of fashion and footwear, have long been calling for concrete planning for tax reforms, IRAPs and recruitment, with the aim of also favouring reshoring. One of the main reasons for reshoring for Italian companies is made in Italy. In this regard, it is recognized as a central role for consumers and international markets in the face of growing demand for entirely made-in productions (Musso et al., 2012).

In light of the examples just presented, it can be concluded which the economic and social resilience of regional territories and some Italian manufacturing promotion policies in support of Made in Italy can help to strengthen the recent reshoring phenomena, representing the elements of the new developments of the regional economy. Several authors (Centro Europa Ricerche, 2015; Forte & Miotti, 2015; SVIMEZ, 2015) support the hypothesis which more development can be part of a business network logic, emphasizing, for

example, their natural location in the Territorial Logistics Chains structurally linked to the economy of the sea, particularly promising in the economy of the South of Italy. Consequently, thinking reshoring as a further phenomenon to accompany specific national policies in the context of a more comprehensive revival of the country's competitiveness is certainly an open-minded challenge both in theoretical and more practical terms and in territorial development policies and regional. Focusing our attention on Italy, it comes to light which a higher coordination between national Government, Regional government and the private sector to promote *made in Italy* is necessary, offering: efficient infrastructures; location opportunities; employees and competences; subsidies and tax reliefs. According to this approach, reshoring becomes, therefore, an essential component of the product differentiation strategy based on research and acquisition of immaterial capital (creativity, cultural values, image, etc.), which allows to increase the perceived extrinsic quality of the products and of place them on high-quality market (Camuffo, 2003; Grappi, Romani, Zarantonello, & Bagozzi, 2015). There is therefore an added value which the product benefits from and which is expression of the places in which it is made: a sort of country of origin effects.

The phenomenon of reshoring does not mean the end of offshoring nor is it expected to bring back all the activities which have been offshored during the past decades. Offshoring is still taking place at the same time which reshoring and the current evidence tends to suggest which offshoring is still more important. Although in the last few years reshoring has obtained relevance for its diffusion at global level, it has not yet been sufficiently studied, it is a phenomenon to be better analysed in terms of the impact which it could have on economic recovery.

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Endnotes

- 1 According to the observatory PwC, 76% of controlled companies have modified, or have the intention to do so, the suppliers in the last ten years, in the majority of the cases, less than 25% of the production is carried out in Italy.
- 2 Laboratorio Molise, promoted by EURIDIT, with the Province of Isernia and the Municipality of Petroranello.