

**From  
globalization  
to ecological  
& solidarity  
reshoring**

# From globalization to ecological and solidarity reshoring

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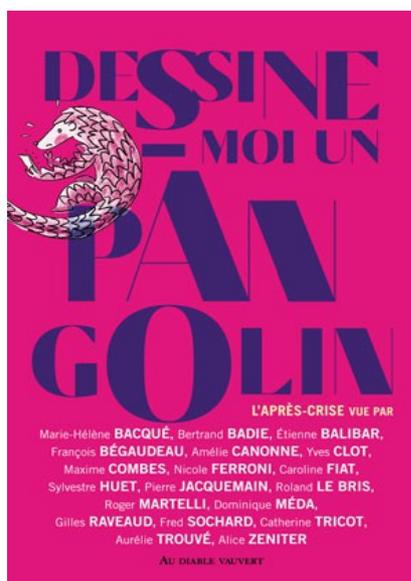
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*This contribution owes a great deal to the rich and fruitful exchanges within the European and international networks closely involved in the follow up of the EU trade and investment negotiations, as well as to regular exchanges with international trade experts.*

**Homemade translation - Thank you for being indulgent. (Footnotes have not been translated)**

Written in June 2020 for the book *Dessine-moi un pangolin* (Regards/Diable Vauvert – august 2020)

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Cover Illustration : "A Cargo Ship @ Colombo Port" by Rakhitha M. Karunaratne is licensed under CC BY-NC 2.0

### *"We need more free trade agreements"*

This sentence is not taken out of a speech by Pascal Lamy in the firmament of neo-liberal globalization in the mid-2000s<sup>1</sup>. It is from Phil Hogan, his current successor at the Berlaymont, head-office of the European commission in Brussels, in an interview given in the midst of the COVID-19 pandemic, early May 2020. Hogan sets the scene: at a time when the globalisation of production and trade is being blamed from all sides, the European Commission will do anything to save it.

In Brussels, the free trade virus, tied with corporate impunity, is far from overthrown. Behind closed doors and over cameras, Phil Hogan's teams took advantage of the lockdown period : at the beginning of May, a new agreement with Mexico was finalized, with the aim to facilitate food products and fossil fuels imports towards Europe, and to open up mexican local procurement contracts to EU-based transnational companies<sup>2</sup>. Those, in return, will get further protections through the new investor-state dispute settlement mechanism<sup>3</sup>.

In order to increase meat imports from New Zealand and Australia, the EU commission has been going on with the negotiations with these countries in April and May 2020. Moreover, the Commission has revived the idea of wheedling Donald Trump with concessions on food and health<sup>4</sup>. In addition to the agreements with Singapore, Japan and Vietnam which have been concluded over the last 24 months, there is also the agreement with the Mercosur countries, about to be finalized, and draft agreements under negotiation with many countries, notably China (investment), Chile and Indonesia, or on specific sectors within or outside the WTO, such as fisheries, e-commerce or services<sup>5</sup>. The last two are a European priority.

The European Commission is proceeding as if the pandemic had not revealed the flaws of neo-liberal and productivist globalisation and the tensions on global supply chains (face masks, tests...), with dramatic consequences. And as if public opinion had not evolved: according to various public surveys, nearly 90% of respondents now call on public authorities to reshore production chains scattered around the world<sup>6</sup>.

So, is it a stop or a go for globalization ? This is one of the major challenges of the coming months. If the word "reshoring" is now on everyone's lips, it is used in a minimalist and cosmetic way, in its neo-liberal version, in order to save the rules of the globalized game. In other political segments, disguised as sovereignty and patriotism, it takes a

hateful turn, in a nationalist version that pushes all issues and debates back to the borders of nation states. However, between the the neo-liberal world market and xenophobic nationalism, there is a third way : that of ecological and social "reshoring", without sacrificing international solidarity - quite the opposite.

It is the purpose of this contribution to sketch out this third path: our collective capacity to nurture these new popular aspirations for reshoring will determine to a large extent our collective future. Three major policy options are on the table today. But social and ecological reshoring seems to us the only one that could embody a desirable collective horizon. Here's why.

### **The pandemic has reshuffled the cards : from "slowbalisation" to "deglobalisation"**

In just a few weeks, the coronavirus pandemic has completely destabilized the economic globalization that was glorified as the model for the optimal organization of resources and the market. Starting from one of the Chinese centers of capitalism, crossroads of the international division of production, Wuhan, the pandemic will unfold by following international passengers, business or tourism flows, and establish itself at the heart of the most integrated areas into world capitalism: from South Korea to Lombardy, from cruise ships to airport zones, the regions that were the most embedded within international trade flows were hit first.

From face masks to tests, shortages of medical equipment, observed in almost every country, revealed how the international division of labour and the continuous lengthening of supply chains are in reality sources of real, even intimate, and unbearable danger. On the grounds of increasing the cost-competitiveness of transnational companies, the fragmentation of production into labyrinthine subcontracting chains has placed our health security at the mercy of even a minor incident occurring on one of these chains.

These value chains, which transnational companies have consolidated over the last three decades, account for more than half of world trade and ultimately involve a very small number of suppliers. For example, UNCTAD recalls that 20% of world trade in intermediate products originates in China, compared to barely 2% in 2002. Many sectors have become almost entirely dependent on China<sup>7</sup>. Of the 14 million containers that arrive in Europe each year, 10 million come from China. France's exposure to products made in China has increased fivefold

between 2000 and 2014<sup>8</sup>. This means that more than 80% of the active components of medicines used in Europe are imported from China and India, compared with 20% thirty years ago.

The successive containment measures in China, then in Europe and finally in the United States, have thus shattered the globalisation of trade organised in just-in-time flows, and following the zero-stocks rule. According to UNCTAD, after falling by 4% in the first quarter of 2020, the value of world trade is expected to fall by 27% in the second quarter<sup>9</sup>. This is a much more violent shock than in 2008-2009, during the previous financial crisis<sup>10</sup>.

And there is no guarantee that it will pick up again in the coming months, while it has been slowing down for several years. For the first time in nearly seventy years, the trade/world GDP ratio, a statistic that reflects the globalisation of trade, had in fact stabilised around 30% of world GDP. Similarly, the volumes of financial transactions, including foreign direct investment (FDI), which had been growing steadily and continuously up to 2008, have also ceased to grow.

Roberto Azevêdo, the (soon to leave) WTO Director General himself acknowledged that the golden age of world trade, when trade used to grow twice as fast as world GDP, was now ancient history / a thing of the past. The term "slowbalisation" is beginning to impose itself in the public arena<sup>11</sup>: a soft globalisation, but one that still breathes. For although growing less rapidly than world GDP, world trade grew by 2.9% in 2018 and remained almost stable in 2019. As for the stock of FDI, it continued to grow, although less steadily, reflecting the consolidation of the existing value chains rather than the expansion of internationalisation<sup>12</sup>.

The situation seems quite different today and two factors could have a massive and structuring effect on the reconfiguration of globalization. The first is linked to the economic recession itself, which is forecast to be long-lasting and widespread across most of the world's economic powers: with a GDP collapse anticipated at -6 or -8% over the year, it is certain that the volume of world trade will follow the same trend. According to UNCTAD, the decline in foreign direct investment observed since the beginning of the pandemic illustrates these recessionary expectations. This is not just a temporary shock<sup>13</sup>.

The second factor comes from the import and export restrictions introduced by States since the beginning of the health crisis. According to the WTO, 80 countries or customs zones have used such measures, mainly for medical equipment (masks,

respirators, etc.) but also for foodstuffs and everyday consumer products<sup>14</sup>. These practices, authorized by Article XI of GATT, can theoretically only be temporary and applied only to essential products in order to prevent or alleviate the risks of shortages. Many countries in Eastern Europe, North Africa and sub-Saharan Africa are more than 50% dependent on imports from Europe for many medical goods: there is no doubt that European restrictions on the major five medical products involved in the covid-19 treatment protocols have had a serious impact on them<sup>15</sup>.

While these emergency measures come on top of the more "traditional" international trade restrictions that the WTO considers to be increasing year after year<sup>16</sup> - these measures have quadrupled between 2009 and 2019<sup>17</sup> - the WTO and the IMF, as well as the OECD, are already concerned about their sustainability and possible extension to other sectors<sup>18</sup>.

### **"Reshoring", the same word for three separate projects**

Yet the term "reshoring" is on everyone's lips, including those of people who have been working for years to deepen neo-liberal globalization in the name of lowering production costs in order to increase people's purchasing power<sup>19</sup>. "Globalisation has gone too far" conceded Thierry Breton, former CEO of Atos and current European Commissioner for Internal Market<sup>20</sup>.

In France, Emmanuel Macron was quick to get on this battle horse. As early as March 12, in a televised speech, he said that "delegating to others our food, our protection, our ability to care, is madness", specifying that we had to "take back control". On March 31, on the sidelines of a trip to a mask production plant, he went on, saying that "our priority is to produce more in France and Europe" in order to "regain our independence" and "rebuild our sovereignty".

These words nevertheless reveal how flexible political speeches are, and can be unrelated to day-to-day decisions: on March 30, one day earlier, the EU Council, including France, gave the green light to the EU-Vietnam trade agreement<sup>21</sup> - endorsed by the vast majority of MEPs supporting Macron's policy. Moreover the French executive neither commented when the EU-Mexico agreement was announced, nor when Phil Hogan insisted on the need to sign new agreements.

The calls for reshoring cannot hide the intrinsically unsustainable nature of the world production system: in its report "Global Resources Outlook to 2060",

the Organisation for Economic Co-operation and Development (OECD) estimates that natural resource extraction will have to increase by 111% (150% for metals and 135% for minerals) to fuel annual world growth of 2.8% by 2060. Even relocalizeed in the name of revisited forms of protectionism, such an economic model remains unsustainable and undesirable. Anyway, after some hesitation, the European Commission has already turned its back on any desire for "reshoring"<sup>22</sup>.

### **Strategic autonomy, a new European mercantilism?**

In Brussels, the concept that has the wind in its sails is that of "strategic autonomy". It would allow, far from the promised U-turn, to change the European trade doctrine on the margins only : "it is not a question of turning our back on free trade, but of ensuring that we do not depend on others in certain critical areas such as the pharmaceutical sector or that of raw materials," Thierry Breton recently specified, at the end of a meeting with the industry ministers of the 27 EU countries.

By strategic autonomy, the European Commission intends, on the one hand, to protect European companies and assets from the appetite of foreign investors in a limited number of areas (health, etc.). However, it has no ambition to call into question the EU general openness as regards foreign investment. And on the other hand, while arguing in favour of the reduction of the EU's over-dependence on external suppliers, the EC's main concern remains to ensure that the aggressive agenda of opening foreign markets in favour of European economic interests persists<sup>23</sup>.

From the justified observation of the scarcity of goods that are absolutely crucial for communities to survive, the conclusion is drawn that our dependence on vital sectors - whose development and capture by our European "champions" has been facilitated - could be resolved by a few simple incentives to "reshore" the production system, in a quite classic capitalist framework. Without any consideration for jobs or for the environment : this "resilience", another fashionable concept in Brussels, could be achieved through a market-based framework, thanks to a few diversification and some greater flexibility throughout the production chains<sup>24</sup>. In this "economist" vision, the concept of "resilience", although useful to start a democratic debate on how to meet our basic social needs, is emptied of its substance and reduced to the capacity of the neo-liberal and productivist economy to absorb relatively new exogenous shocks.

Before the pandemic already, the Commission considered that most of the world economic growth would take place outside European borders (Africa, Asia, etc.), justifying that everything possible should be done to ensure that European companies gain a share in these new markets. After the pandemic, the situation has barely changed: domestic prosperity makes it necessary to secure access to raw materials and to guarantee European transnational companies' grip on supply chains, at the lowest possible cost in order to win new markets. This trade doctrine that sees global competitive integration as the only vehicle for Europe's prosperity has hardly changed.

Only the range of instruments to enable the European economy to engage in international trade rivalry is widening : public aid for domestic activities at risk, a few controls of foreign investment, further anti-subsidy mechanisms towards third countries, a possible carbon border adjustment mechanism. There is no willingness to subjugate markets and transnational companies: on the contrary, public intervention is crafted to their advantage, in order to protract the competition and external competitiveness policy that the EU has been pursuing for years, and to satisfy a twofold objective: trying to fight China and the United States on their own turf, and continuing to subjugate the countries that are dependent on the EU for their imports and exports.

Whereas most EU and Member States' institutions as well most influential economic lobbies are viscerally attached to international economic competition, and while trade policy is an EU competence, abandoning the principles of free trade and the instruments of domination that accompany it is not on the agenda. Brussels's and Member States' capital's refusal to engage in an alternative path could unfortunately feed nationalistic and xenophobic backslidings, whereas those do not need further fuel to prosper. This is even more a risk as neo-liberalism has become increasingly authoritarian.

### **Business as usual with the exception of "national security" is only a step away**

In this context, more and more countries have been using the concept of "national security" to take measures to protect their internal market while supporting the international expansion of their transnational companies.

Recognized by Article XXI of the GATT, the national security exception had been used only on very rare occasions by WTO members. It is this principle that Donald Trump mobilizes behind his threats and customs decisions towards China or the

European Union. Til recently, in the rare cases where the national security exception was activated, it had not been challenged by third countries, very likely because it is legitimate, and because everyone wants to keep the possibility of activating it in turn, but also out of fear of wiping out the world trade system as a whole. This is no longer the case: the EU, China, together with Mexico, Norway, Russia and Canada, have brought the US decision to unilaterally increase customs duties on steel and aluminium before the WTO's Dispute Settlement Body (DSB).

Regardless of the DSB ruling, if there is ever a ruling, the Pandora's box is open: if "national security" can justify trade restrictions on ordinary goods such as steel and aluminum, then others will jump in. Including as a justification for perpetuating the exceptional measures taken in the context of the Covid-19 pandemic.

In a system of trade warfare, especially for access to resources, international powers will mobilize all available economic and political instruments to promote the interests of their transnational companies and secure their supplies. Free trade imposed on the weakest and a geopolitical-economic balance of power between major powers - this is the dual world that has been taking shape right in front of our eyes.

The effective backlash of globalization and the rise of competition between great powers in a fragmented world, will highly likely encourage the leading groups to rely even more on martial and identity-based rhetoric. By trivializing the state of emergency and the repression of protests and by shrinking individual and collective freedoms, they have already detached themselves from democratic values and political liberalism. Neo-liberalism and authoritarian ultracapitalism, in a form of ruthless struggle for survival, could come together even more in the name of supporting national or continental "champions" in the economic war.

### **Ecological reshoring with strong international solidarity**

This future is far from inexorable. Firstly, because it is the result of political decisions that can be influenced, transformed or stopped. Secondly, because there is an alternative path. Demanding and fraught with pitfalls, this alternative path relies on popular aspirations for reshoring that need to be fed with ecological, social and international solidarity demands. It should take a radical distance from both the desire for power and domination embodied in Brussels' authoritarian free trade and its national incantations that wave the flag of national economic

sovereignty, whether on the left or on the right. When, on the contrary, it is necessary to think jointly of the local, the economy of the territory, and the international, the economy of the other territories of the planet.

First of all, it should be noted that industrial reshoring is not a completely new phenomenon. It has been several years since the reshoring process has slowed down considerably and a few minor cases of reshoring have been observed and reported in the press. While no massive reshoring was taking place, fragments of supply chains in several sectors have been brought closer to consumer markets ("nearshoring"), particularly as a result of increasing production costs in emerging countries (notably due to wage raises) and the rise in the cost of certain supplies<sup>25</sup>.

But let's be clear: the issue we are facing is not how to repatriate within the national territory the activities currently established in the Global South, and to replicate production and consumption patterns that are as harmful to the planet as they are to local populations. We are not thinking by factory, or by "production unit". By reshoring, we refer, first of all, to the need to decrease the flow of financial capital and goods in order to reduce the role of sectors that are toxic to the biosphere (fossil fuels, chemicals and agro-industry, electronics, etc.) while providing enough to meet the needs of populations and territories. It is a long-term vision based both on the aspiration to no longer depend on globalization and on systemic policy vision which requires capacities for innovation, training and democratization of decision-making.

In this perspective, the objective is not to repatriate textile factories from the suburbs of Hanoi or Dhaka that produce poor quality disposable clothing, but to rethink the need for clothing and to provide it through territorialized, socially just and ecologically sustainable channels. It is a question of upgrading the range of products by completely reorganising production chains, enabling the creation of local, long-term, high-quality jobs, which would no longer depend on the evil power of transnational companies incapable of taking account of the general interest.

In its "alterglobalist" version, reshoring means moving from "producing more, ever faster, anywhere, with less work and fewer environmental constraints" to "producing better, in order to satisfy the essential needs of populations, via local distribution channels, more quality jobs and production processes respectful of ecosystems". This challenge calls for developing all together a long-term and a short-term approach. Some measures are

obvious and widely acceptable, whereas others that must be discussed, clarified and experimented with.

### **Unlocking ecological and social reshoring**

There is a prerequisite. It's the easiest step on paper. Yet we are far away from it. The spiral of trade and investment liberalisation must be stopped: the EU must immediately stop its trade negotiations and postpone the conclusion of new agreements, including at WTO<sup>26</sup>. Since the goal should be to unlock the conditions for the ecological and social reshoring to be possible, we must start by not creating new constraints. Extending trade and investment liberalisation agreements means inserting new companies, new activities, new jobs and new resources into global supply chains which, shielded by international law that limits the regulatory power of governments, will be increasingly difficult to untangle, whereas those worsen the systemic risks witnessed during the pandemic. This is also true at state level: the EU must stop forcing countries to step into globalisation when their populations do not want to. For example, the negotiations on forced e-commerce are much more relevant to the needs of Amazon than to the needs of African populations.

As envisaged here, a systemic reshoring policy must be able to activate all the levers of public action: financing and investment in research, education, adapted local infrastructures (transport, industries, etc.), but also to be able to introduce stringent standards on production, drastic regulations on inward investments, or selective criteria in public procurement. All these measures are currently curtailed or constrained by international trade rules, whether they are those set out in the WTO agreements, in bilateral agreements or in European directives.

Since the WTO and its rules make it impossible to discriminate between equivalent foreign products on the sole basis of how they have been produced, the EU - and the states if it does not - must derogate from this rule by means of quantitative restrictions and non-tariff barriers in order to stop importing products that do not meet European social, ecological and health standards. Some of these measures will receive immediate and overwhelming public support, such as ending imports of products whose manufacture leads to deforestation<sup>27</sup>.

Anyone who says they are breaking the rule will be subject to WTO sanction mechanisms and investor-state arbitration. Public authorities have to escape this parallel justice that protects transnational companies' interests to the detriment of their regulatory power. Legislators and regulators should no longer be forced to act under the threat of

prosecution or sanctions. To this end, certain existing agreements must be denounced and abandoned. This is the case of the little-known Energy Charter Treaty (ECT), which is likely to undermine the capacities to fight global warming<sup>28</sup>. It guarantees a considerable level of protection to fossil fuel companies that already hamper the policies urgently needed to curb GHG emissions (e.g. closure of coal-fired power plants).

Another indispensable step is that the WTO and the EU must revisit the rules regarding State aid when they prohibit public support to production and services related to the meet of population's basic needs: health, food, education, access to water and energy, public transport, housing, etc. In such sectors, State and local authorities' financial involvement should be permitted at all stages of the reform process.

The health sector is a good illustration. Patents and licences on existing medical treatments, goods and devices, which are essential for the treatment of major pandemics, must be returned to the public domain. Whether or not the transnational companies that are have them want to do so. States must be able to revoke patents whenever necessary in order to produce medicines locally, at an affordable cost, in generic form. Without fear of being sued and condemned before an arbitration tribunal by a powerful pharmaceutical company. At the same time, public drug services must be able to be supported by public money without being put in competition with private laboratories. Finally, the production and distribution of these vaccines and medicines must be able to be socialised at the global level so that no population is deprived of them, all under the supervision of a reformed and democratised World Health Organisation (WHO).

### **Organising international solidarity**

These preliminary and necessary first steps should spark off wide support from public opinion. They deserve broad and united alliances in order to achieve quick victories and reopen the field of possibilities. At a time when the globalization of trade could slow down or be reversed, it is no less urgent to do everything possible to ensure that any new agreement liberalizing trade or investment is stopped.

Let us now consider some aspects that deserve to be discussed and clarified further. Backshoring does not imply to split up from the rest of the world, and this is the major break we are proposing with the exclusively sovereigntist vision of reshoring. What must become possible again in our communities and in Europe must also be possible in all countries of

the planet: increasing the dependence of Global South on European or North American agriculture or industry would be a no-go, as well as maintaining more or less coercive forms of domination to ensure unlimited access to african, asian and latin american natural resources and raw materials.

Substantial funding must therefore be secured to support the populations of countries that find themselves vulnerable to such a reshoring movement, in order to enable them to develop sustainable activities geared towards local needs. The factories that supply world markets must gradually be converted according to this direction. There is a need for a global fiscal revolution, so that all States can effectively bring in the outcomes of taxation, including those to be levied on transnational companies that too often dodge it, and so that States from the "North", in particular, can mobilize increased resources for international solidarity.

Reshoring in no way forces us to give up on crossborder trade if it is based on complementarity, cooperation and solidarity. Many sectors will not be able to do without foreign raw materials and intermediate goods in the near future. But several principles can guide the choices made. The first is to establish a subsidiarity principle that prevents imports of what can be produced locally. The second makes public procurement, which can represent up to 15 or 20% of the GDP of certain countries, a lever for backshoring, through the systematic inclusion of preferential criterias favoring local labour and suppliers. They could also include a dimension of international solidarity inspired by fair trade experiences, that actors have been trying to introduce in the public sector for a long time. The third could lead to strategic sectors being regulated and excluded from the rules of competition, as long as they give priority to real needs, the long term and employment.

Fourthly, a kilometre tax applied to imports as well as exports, regardless of the transportation mode, could substantially increase the cost of freight and discourage long-distance freight transport. The amount of this tax would increase proportionally according to the distance travelled between the place where the goods are produced and the place where they are sold. This tax would encourage the development of local and regional economic channels and would make long-distance trade very uncompetitive. Such a measure would pave the way for economic development paths that would be much more centred on local needs, and would open the possibility for local people to decide what they will produce and how. Moreover, the kilometre tax is a cooperative tool that makes exports as expensive as imports, without disadvantaging the trading partners of the country taking the initiative. Such a proposal is the antithesis of a carbon tax at the EU's borders, which by its very nature is not cooperative.

### **Decolonising and democratising global geopolitics**

It is obvious that such an orientation would be all the easier if it could be based on profoundly renewed forms of international solidarity and cooperation. Taxing kerosene and ship fuel oil to reduce international flows or introducing international taxes to finance WHO and international climate solidarity is theoretically easier in a cooperative multilateral framework.

At a time of trade war and the voluntary weakening of all international cooperation institutions, led by major powers, the willingness to democratize them and extend their capacities for coordination and solidarity may seem like wishful thinking. Nevertheless, we must tirelessly stand firm on these demands: resolving the challenges posed by a pandemic or by climate change is a matter of mandatory international solidarity.

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