

Compressing Diversity: Ethnicization of the Workforce and Outsourcing of Social Reproduction as Assets for the Italian Fashion Industry

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This paper provides new evidence and offers a new theoretical framework for the analysis of the mode of emplacement of Chinese migrants in the Italian fashion industry. My research brings to light two conditions as keys to understanding the role played by the migrants in the generation of profit: (1) the compression of workforce diversity through a process of ethnicization, and (2) the restructuring of social reproduction. In order to shed light on these processes, this paper engages with the scholarly debate on immigrant entrepreneurship. It questions the conceptualization of workshops owned by Chinese migrants as “ethnic entrepreneurship” and suggests analyzing the workforce sharing the same national origin as a process of ethnicization of the workforce. It suggests that the mode of inclusion of the Chinese migrants should be viewed in the framework of globally fostered politics of production – especially fast fashion strategies – and as part of the diversification of labor. Using previously untapped data on labor market dynamics and based on extensive fieldwork, I show that the previously existing balance of power between employers and workers is now shifting as a result of the scarcity of skilled workers and migrants’ mobility outside of manufacturing activities.

Keywords: *fashion industry, Chinese migrants, immigrant entrepreneurs, ethnicization, social reproduction*

Introduction

Starting in the 1980s, the Italian fashion industry, a leader at the international level, had to face the impact of drastic alterations in the global trade architecture. As was the case elsewhere, a neoliberal approach was adopted to drive down production costs. This mainly consisted of encouraging immigration in order to undercut labor costs and “going global” in order to seek out cheaper pools of labor abroad.

In response to this, new Chinese migrants arrived in Italy, hailing from Zhejiang and later also from Fujian and the northeastern provinces. Counting on opportunities offered by the Italian migration regime and labor markets, as well as on small networks of Chinese migrants already established in Milan, Bologna, Florence and Rome, new Chinese migrants were able to enter en masse into the fashion industry. Today, Chinese people holding permits of stay in Italy number 320,794 and are the owners of 42,705 businesses (Ministero del Lavoro e delle Politiche Sociali [Ministry of Labour and Social Policy], 2014).

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In the Italian fashion districts, Chinese migrants were not primarily recruited as workers in native-run firms, as many other migrants were, but as contracting entrepreneurs and as workers overwhelmingly employed by co-nationals. In 2009, non-EU entrepreneurs in the main Italian clothing districts made up 39% of the total, and Chinese entrepreneurs alone accounted for 37% (Osservatorio Nazionale Distretti Italiani [National Observatory on the Italian Industrial Districts], 2010). In Prato, a textile city just north of Florence, Chinese migrants are the owners of 49.5% of all manufacturing businesses; if only clothing is considered, they own 85% of the businesses (Camera di Commercio Industria Artigianato Agricoltura [Chamber of Commerce of Agriculture] (CCIAA) di Prato, 2014).

This paper provides new evidence and offers a new theoretical framework for the analysis of the mode of emplacement of Chinese migrants in the Italian fashion districts. Research about Chinese manufacturing businesses in the Italian fashion industry suggests that for more than two decades, Chinese contractors could profit from the continuous influx of a cheap workforce from China. Profits also result from longer working hours and off-the-books practices. Chinese contractors are thus able to charge substantially lower prices than Italian contractors and to guarantee shorter lead-time before delivery (Barberis, 2009; Ceccagno, 2003; Spinner, 2005).

In an earlier paper, I argued that the most crucial competitive advantage in the Chinese contracting businesses is gained through an articulated reconfiguration of the production space at the intra- and inter-firm level that I termed “the mobile emplacement” (Ceccagno, 2015). This paper takes the analysis of mobile emplacement one step further. It proposes two conditions as key to understanding the role played by Chinese migrants in the generation of profit: (1) the compression of workforce diversity through a process of ethnicization, and (2) the restructuring of social reproduction. Both processes are intrinsically interconnected with the restructuring of production.

To examine the nature of these processes, this paper engages in the scholarly debate on immigrant entrepreneurship, questioning the conceptualization of workshops owned by Chinese migrants as “ethnic entrepreneurship.” It argues that such a theoretical approach does not help to better understand the reasons why, over the last 25 years, the Chinese contractors’ working regime—with a recent outstanding exception—has not been fought against as violating labor rules and regulations. This paper proposes a new conceptualization that links ethnicization of the workforce and global outsourcing of social reproduction to the imperatives of fast fashion² in the restructuring of the Italian fashion industry.

The second part of the paper presents and discusses previously untapped data on the labor market involving Chinese migrants, which underscores the complex, flexible and ever-changing architecture of the fashion industry—with Chinese-run workshops at its center.

² Fast fashion is a business strategy aimed at reducing involved processes in the buying cycle and lead times in order to be attuned to the most recent fashion trends. The key ingredient of fast fashion is the ability to track consumer preferences quickly and to identify potentially popular new designs through daily proximity to fashion markets, fashion images, and fashion makers. Design capability is coupled to supply chains that can quickly obtain fabrics, manufacture samples, and start marketing products with far shorter lead times than those of the traditional production calendar.

Methods

The findings presented in this paper are part of an ongoing research project on Chinese migrants in the Italian fashion industry. I conducted fieldwork in Prato in June-September 2012 and December 2012 to March 2013, with further meetings, interviews and feedback in September-December 2014. In-depth interviews were conducted with Prato residents, including those who were native-born, immigrants, first and second-generation immigrant entrepreneurs, children of immigrants, policymakers and members of nonprofit groups. Moreover, I conducted in-depth interviews with two key informants. I also participated in a series of events: quasi-theatrical representations of the conflicts in the city that involve Chinese migrants, conferences where natives discussed the “Chinese issue”, and public assemblies where first-generation Chinese citizens were invited by local and regional government authorities to learn about the modes and timing of enhancement of a new policy aimed at Chinese businesses. Finally, analysis of the Internet job market’s demand and supply was conducted in June 2015 to provide further evidence for the argument I propose in this paper—namely, the shifting balance of power between employers and skilled workers. This primary research in Prato complements previous long-term research on Chinese migrants conducted in the years 1994-2007 (Ceccagno 2001; 2003; 2007; 2009).

The Problematic Concept of Ethnic Entrepreneurship

Migrant entrepreneurship in contexts where employers and employees share one national origin has frequently been analyzed in terms of ethnic entrepreneurship. The ethnic entrepreneurship conceptualization posits that migrant economic incorporation is primarily an outcome of the cultural attributes and human capital attainments of a specific ethnic group (Light, 1972; Light & Gold, 2000; Waldinger, Aldridge & Ward, 1990). It is assumed that cultural repertoires, skills and practices structure the economic performance of a migrant population that shares a place of origin (Bonacich & Model, 1980; Light & Bonacich, 1988).

The Chinese contracting workshop regime in Italy is often analyzed as the quintessential ethnic entrepreneurship model, where migrants exploit some competitive advantages connected with their status as a group in order to better succeed in the industry where they gain access.

Some scholars, however, have moved beyond this focus on co-ethnic social capital. Kloosterman, Van Der Leun and Rath (1999) challenge the approach that positions the concept of embeddedness as almost exclusively related to the social and cultural characteristics of immigrant groups, neglecting the wider economic and institutional context in which immigrants are inevitably embedded. They propose instead the more comprehensive concept of “mixed embeddedness” that encompasses the interplay between the social, economic and institutional contexts.

Schiller and Caglar (2013) argue that research should move beyond the ethnic lens. Scholars should reject methodologies that make unquestioning use of the ethnic group as the primary or exclusive unit of study. (See also Nowicka and Ryan’s (2015) argument against groupism in social studies.) While migrants’ transnational social fields play an important role, the approach that stresses inter-ethnic ties alone cannot explain the main dynamics at work.

Building on these approaches, in analyzing the pathway of Chinese migrants' economic inclusion, I suggest that the conceptualization that analyzes the pathway of Chinese migrants' economic inclusion as ethnic entrepreneurship be abandoned and a structural approach be adopted. A culturalist approach risks overshadowing the relationships of unequal power between contractors and final-good firms, and portrays migrant agency as something that is isolated from the forces prevailing at the local, national and global levels, and the interests they defend.

Thus, while focusing on Chinese migrants, the unit of analysis in this paper is not the ethnic group per se, but the migrants' pathway of emplacement in the Italian fashion industry as it takes place and is shaped by local and national institutions and broader fields of power in a particular historical setting (Schiller & Çağlar, 2011). This new approach helps redirect the analysis of the mode of emplacement of the Chinese migrants in the Italian fashion industry: practices that had been interpreted as "ethnic" are instead the outcome of structural factors that combine to make possible this particular labor organization.

Tsing (2009) argues that as much as the spread of capitalism is anchored in its ability to incorporate contingencies without forming a single, homogeneous structure, labor with its contingent articulations exhibits an intrinsic globally interconnected diversity. Mezzadra and Neilson (2013) posit that the heterogenization of global space forces territories and actors into unexpected connections that facilitate new processes of production and exploitation. They put forth the concept of "multiplication of labor" that points at the emergence of new forms of labor and different kinds of production.

Building on critical migration and labor studies, this paper analyzes the mobile regime of the Chinese migrants in the framework of the trend to diversify various components of the production process, including the characteristics and the management of labor and workers' lives. It illustrates that the production regime adopted by the Chinese migrants serves the interests of the entire fashion industry and not a single workshop or a national group.

Reconfiguring the Production Space

In most Italian productive clusters where Chinese contractors are active, workers are offered board and lodging in the workshop premises, where the owner's family also lives.

While this sleeping regime has been described as a characteristic of Chinese workshops that reduces costs and adds flexibility (Bressan & Krause, 2014; Ceccagno, 2003; Wu, 2008), only recently has it been analyzed in the framework of the repositioning of the Italian fashion industry within globe circulating processes of capital and labor (Ceccagno, 2015). The sleeping regime has made it possible for Chinese contractors to establish their businesses in areas where native manufacturers cluster, thus re-attracting productive tasks to the industrial districts that had previously been performed by native contractors located in distant areas (Ceccagno, 2003; Doeringer et al. 2009). In fact, by offering room and board to workers, Chinese employers were able to attract large numbers of co-national migrants into the Italian industrial districts. In turn, and crucially, by clustering their businesses in the Italian districts, Chinese contractors made it possible for what I have termed "in situ offshoring": the benefits typical of international outsourcing are offered without requiring the geographic re-allocation of the production (Ceccagno, 2003). Paba and Murat (2006) confirm this finding by showing that Chinese contracting businesses are found mainly in

those Italian districts that do not have offshore productive activities. Over time, Chinese contracting businesses also moved to areas that had experienced massive production delocalization, such as the Veneto region³.

The sleeping arrangements are part of a more comprehensive reconfiguration of the productive space that also includes workers' mobility. Workers' mobility is two-fold. It consists of workers' short-term, inter-firm mobility from one workshop to another, and, increasingly, of frantic territorial mobility from one employer to another.

In the fashion industry, suppliers must rely on a large productive capacity when high volumes of orders are received. To do so, especially in the early and mid-2000s, many Chinese suppliers have been able to count on an informal organization of the work whereby workers could temporarily move from one workshop to another (Ceccagno, 2009). As a result, an informal network of Chinese contracting firms can routinely resort to occasional workers to complete urgent orders. The advertisement below, posted by a Chinese worker on June 4, 2015 on a job demand and supply website, is an example of this practice:

I am an ironer for many years, now my workshop does not have enough orders, so I am looking for a job at a stitching workshop or a manufacturing business that is looking for temporary help. (<http://vidali.huarenjie.com/>)

This informal organization offers a net competitive advantage in terms of flexibility to the entire fast fashion industry. Recently, however, this form of short-term, inter-firm mobility has become less widespread. Workers' mobility increasingly takes the form of frantic territorial mobility, with workers in search of better working conditions, in and outside of the fashion industry.

Territorial mobility gained momentum in the late 1990s when shifts in Italy and in the sending country opened up new possibilities. On the one hand, with the 1999 immigration law putting an end to the ban on immigrant entrepreneurship and favoring the regularization of illegal migrants, many Chinese were able to become stitching workshop owners (Ceccagno, 2015). On the other hand, the liberalization of the import-export trade in China at a time when China was becoming a global producer of low-cost goods opened up opportunities to become importers, wholesalers or retailers for those migrants who had amassed enough money in the previous decade. Frantic territorial mobility ensued as Chinese migrants were eager to take advantage of the opportunities up for grabs.

Until the late 1990s, the Chinese workshops' arrangement with workers living in the workshop premises had been a fairly stable one, and rarely did the workers quit the workshop without notice. A couple of times a year, employers and workers explicitly or implicitly planned the reciprocal obligations for the following months. This informal arrangement was highly beneficial for the employers as they could retain skilled workers.

Evidence from my previous fieldwork shows that in the late 1990s these agreements tended to disappear (Ceccagno, 2001). A new era had started, in fact. With the mushrooming of the Chinese contracting business in Italy, those who could not open their own businesses could at least move to other workshops as soon as they heard of better working and living conditions. Workers' territorial mobility thus became a regular feature of the network of

³ One of 20 regions in Italy; located in the northeast with its capital Venice.

Chinese workers. While more research is needed to assess the actual dimensions of workers' mobility, Internet job advertisements analyzed in the second part of this paper provide evidence of the imbalance between the number of employers attempting to attract workers and the number of workers looking for positions in the Chinese migrant job market.

The Chinese mobile emplacement in the Italian fashion districts thus takes the form of a reconfiguration of the productive space of production, consisting of reworking both intra-firm stasis and inter-firm mobility. Far from being a mere organizational factor, this reconfiguration of the space is crucial for generating previously unattainable profits. In fact, it enables contracting units to swiftly respond to the high flexibility required by the market.

The Global Restructuring of Social Reproduction

The reconfiguration of the space discussed above raises the question of the articulation between the sphere of production and the sphere of reproduction, and the way in which transnational households come to terms with labor markets and the regulatory spaces of states and localities (Coe & Jordhus-Lier, 2011).

Particularly important for this paper is the argument that the global restructuring of production is intertwined with a parallel restructuring in the sphere of social reproduction. In analyzing migrant work in meatpacking factories in Illinois, Miraftab (2014) shows how the two forms of global restructuring are constituted relationally. She points out that "to realize the social reproduction of immigrant workers in Illinois, an army of people, with women at the center, are at work elsewhere in their support" (Miraftab, 2014, Accumulation by Displacement section, para. 9), nursing children and caring for family and elderly left behind. This amounts to an "outsourcing" to home countries of reproduction and care work for segments of workers' life cycle such as childhood, or periods when workers are unable to work (Parreñas, 2005).

This also applies to the Chinese migrants' mode of incorporation in Italy. Parallel to the restructuring of production, a process of restructuring occurs in the sphere of social reproduction through simultaneous place-based, trans-local strategies.

Chinese workshop organization requires that everything related to the family and its reproduction that could hinder production is moved away from the production site as much as possible (Ceccagno, 2007). As a rule, in fact, babies of Chinese workers are separated from their parents when they are a few months old, and sent to their grandparents in China. Thus, social reproduction mainly rests on the shoulders of the family members left behind in China.

Crucially, for the Chinese migrants in the Italian fashion industry, the ability to take part in global restructuring of social reproduction makes a difference in the workers' ability and willingness to accept the sleeping regime and inter-workshop mobility.

Over time, the restructuring of social reproduction has taken on new forms. Since the early 2000s, in fact, social reproduction has also been outsourced to different actors in Italy. Some entrepreneurs resort to in-home babysitters. Women originating from northeastern China, who are fluent in standard Chinese, take care of the children in their own houses (Tolu, 2003).

Recently, global division of reproductive labor has acquired new meanings for some wealthy Chinese parents. They increasingly plan their children's return to boarding school in China, convinced that education in China will increase their chances of professional upward mobility. Thus, the trans-local restructuring of social reproduction has been transformed by the wealthiest into a new structure of educational opportunities, where the pros and cons of different localities on the global chessboard are weighed in order to guarantee increased social mobility to their offspring.

The Ethnic Entrepreneurship Concept Covers Up the Different Interests at Stake

Researchers analyzing Chinese migrants' inclusion in Italy often adopt a culturalist approach (for an outstanding exception see Barberis, 2009). Some suggest the existence of an unchanging pattern typical of Chinese migrants overseas, in which they bring their cultural heritage and exhibit a remarkable attitude to risk-taking and opportunistic behaviors (Guercini, 1999; Santini, Rabino & Zanni, 2011).

Others highlight special skills that facilitated Zhejianese migrants' inclusion in the Italian fashion industry (Wu & Zanin, 2007). Dei Ottati (2009) suggests that the success of the Prato fast fashion center is linked to the "thickening" effect of the ethnic business networks. Lan and Zhu (2014) explain the Chinese migrants' horizontal integration of manufacturing and wholesaling through their ethnic networks. Thus, these scholars mainly focus their attention on inter-group dynamics. In turn, this approach paves the way for claims that the Chinese working regime is disembedded from the local context (Pieraccini, 2013).

Much of the literature claiming that Chinese businesses are disembedded from local contexts rests on the observation of shared features of the workforce within the workshops. Chinese workshops in the Italian fashion industry, in fact, employ a workforce sharing only some features: a place of origin in China, a national language, the ideology of the successful migrant with its pressure to reach affluence within a matter of a few years. In the first years, for many the pressure also comes from the need to repay emigration debts.

Ethnic Entrepreneurship or Ethnicity as an Asset? A New Conceptualization

I propose that ethnicity be analyzed not only inside the workshop or within the network of Chinese contractors, but also in the productive organization of the entire fashion industry in Italy. Such an approach puts new light on the use of a workforce made up of co-nationals only in Chinese workshops in Italy. The selection of a Chinese-only workforce turns out to be the precondition for a smooth deployment of the mobile regime discussed above, which in turn is the crucial element of the Chinese suppliers' competitive edge. Only workers sharing the basic characteristics listed above (e.g., language) can easily interact with each other in small workshops or swiftly move from one workplace to another.

I suggest that the mobile regime of the Chinese contractors be analyzed in the framework of globalized regimes of flexible accumulation (Harvey 1989; 2010) as one way in which ever newer modes of production are devised to extract value from labor. Within this framework,

the employment of a workforce comprised of co-nationals only can be analyzed as a process of ethnicization of the workforce aimed at reducing workforce diversity. I suggest that this process be considered one contingent articulation of the globally interconnected intrinsic diversity of labor.

The compression of workers' diversity through measures that ethnicize the workforce is a crucial condition for the intra- and inter-workshop reconfiguration of the production space. Equally important is the outsourcing of social reproduction.

Thus, compression of the workforce's diversity through workforce ethnicization and outsourcing of social reproduction turn out to be the two crucial pillars supporting the mobile regime adopted in the Chinese contracting business. They are the sine qua non of the Chinese migrant's mode of production restructuring. This expands the analytical scope to a broader view of how ethnicity and un/employability relate (Vesterberg, 2013).

In sum, profit provided by the mobility regime to the array of actors in the fashion industry stems from the underlying double manipulation of the workforce through compression of diversity and personal and family life. In turn, this process of manipulation serves the imperatives of fast fashion, which requires that production time is squeezed to the maximum.

The Restructuring of the Italian Fashion Industry

Since the 1980s, the Italian fashion industry has been threatened by sharp alterations in the global fashion architecture. These include the rise of China and other countries as powerful competitors; the restructuring of distribution chains with the consequent growing power of global retailers; and the emergence of global fast fashion strategies (Dunford, Dunford, Barbu & Liu, 2013).

New approaches designed to drive down production costs were adopted with the support of institutions at the national level and beyond. Larger firms in Europe began to "go global" in order to seek out cheaper pools of labor abroad while enjoying trade privileges offered by the EU (Sellar, 2007). A myriad of smaller fashion firms instead took advantage of Italian immigration laws that over the last 30 years have been overtly aimed to help the Italian industrial system find cheap labor (IDOS, 2014).

However, as the Italian model of industrial districts' production was declining (Dunford & Greco, 2006), they needed much more than the costs containment they had obtained by resorting to suppliers in southern Italy. New and more drastic ways of extracting profit were needed. Dunford (2006) pinpoints that the Italian government's tolerance of the employment of undocumented labor should be viewed as an instrument of national government support for the fashion industry.

The Mutual Constitution of Fast Fashion and the Mobile Regime

It was exactly in the late 1980s, when the Chinese migrants started settling as contractors in Prato, that the fast-fashion production mode was adopted (Ceccagno, 2015; Dei Ottati, 2009). Thus, with the arrival of Chinese migrants, the local clothing industry was able to reduce the “time to market” of fashion commodities.

The time pressure of fast fashion is such that new production strategies had to be invented. In Chinese workshops, clothes are manufactured in small batches overnight, and delivery time is reduced to the point that materials delivered in the evening are often processed by the next morning. In many instances, work at night is programmed, as Italian manufacturers finish the design and cutting in the daytime, and deliver the goods to the contractors in the evening to be completed by the next morning (Wu, 2008).

Thus, the needs of fast fashion were met with—and contributed to shaping—the extreme reconfiguration of the productive space of production adopted by the Chinese contractors. The intra- and inter-firm reconfiguration of the space of production is a unique way in which Chinese migrants in Italy have embraced and interpreted fast fashion imperatives (Ceccagno, 2015). While it is only in Prato that the synergy between fast fashion and the reconfiguration of the production space has brought about the creation of a vibrant international lower-end fast fashion center, the same synergy has contributed to the success of Chinese contractors in the other districts that have attracted Chinese migrants years later. In turn, this has brought about substantial benefits—both in terms of price and lead-time—to final-good firms.

The mutual constitution of Chinese firms and fast fashion strategy helps explain why in many districts the Chinese migrants have replaced native contractors (Osservatorio Nazionale Distretti Italiani [Italian National Observatory Districts], 2010). As native contractors cannot compete with this space and time reconfiguration, given the implications on social reproduction and work life, more and more of them are expelled from the fashion industry.

In sum, it is this particular reorganization of the intra- and inter-firm productive space—which rests on the twin pillars of offshoring of social reproduction and ethnicization of the workforce—that enables the Italian low-end fast fashion industry, with Prato at its center, to withstand competition with products from lower labor cost countries, including China. Garments are produced with the speed required by the frantic changes in shape and colors demanded by the fashion industry and can thus rely on higher fashion content than cheaper imported garments (Ceccagno, 2012; Lan & Zhu, 2014).

With the outstanding exception of Prato, where clothing manufacturers are Chinese, a polarization has occurred in the Italian fashion industry whereby Chinese migrants typically occupy the role of contractors and natives act as manufacturers, and less and less often as contractors (Osservatorio Nazionale Distretti Italiani [Italian National Observatory Districts], 2010).

It becomes clear, therefore, that the mobile regime provides previously unattainable profits to final-good firms. Against such a background, Italian institutions have, unsurprisingly, never tackled the extreme exploitation of the workforce in Chinese contracting firms (see Kloosterman et al., 1999).

Interestingly, Prato is now the place where the sleeping regime is under attack, and because of this, the entire mobile emplacement pathway of Chinese contractors risks to be dismantled in the only area in Italy where the Chinese migrants control the entire fast fashion manufacturing process.

A Chinese Mode of Production?

As shown by Comaroff and Comaroff (2009), ethnicization of people and places as a means of generating profit is now pervasive at the global level. For example, processes of ethnicization of the workforce are described by Xiang (2007) in his study of the global specialized recruitment of Indian information technology professionals. Pun (2005) also shows that in the assembly lines at the Foxconn factories in southern China, workers are divided based on dialect/area of origin.

In Europe, Foxconn has built factories in the Czech Republic, Slovakia Hungary and Russia. The division along language and nationality lines is adopted in the Foxconn's plants in the Czech Republic. The same division is adopted in dormitories, where workers are allocated rooms on the basis of nationality (Andriasevich & Sacchetto, 2014). As an institution connected to the workplace, the dormitory itself is based on forms of outsourcing of social reproduction.

Thus, processes aiming at compressing workforce diversity and outsourcing social reproduction are not organizational measures unique to the Chinese-run contracting business in Italy. They can be seen as one of the many ways in which capital restructures production and reproduction in order to generate more profit. In particular, the ethnicization of the workforce can be viewed as value extracted from labor through a compression of workforce diversity.

These pathways are increasingly accepted and adopted within the global restructuring of capital. They reveal new frontiers in labor organization in the European employment system (Sacchetto & Andriasevic, 2015).

And yet, interestingly, the dormitory labor regime is not a regular feature of all Foxconn's factories in Europe but is only adopted where an international, territorially mobile workforce is employed and where national and local institutional and social conditions favor it. The different Foxconn plants in Europe exhibit significant variations in the composition of the workforce and the methods of managing labor both from a social and legal perspective (Andriasevic & Sacchetto 2014). Thus, the specific articulations between the local and the global matter. They contribute to shape the organization and control of the labor processes differently in concrete settings (Rannie et al., 2013).

In fact, while some arrangements adopted in Chinese-run contracting businesses are not unique, the mobile regime developed by the Chinese migrants in Italy exhibits some particular features linked to the legal regimes that regulate migration flow and industrial production, as well as working and housing conditions in Italy. It is also linked to the state's support of small and micro firms in mature sectors, and the degrees at which regulations are enforced by national and local authorities or only left as a threat (Ceccagno, 2015). A systematic comparison with other places where the ethnicization of the workforce and the dormitory regime are adopted is not the focus of this paper. However, some features of the

Chinese-run workshops in the Italian fashion industry—such as the informal employment conditions, or the fact that employers and employees share the same living spaces and, to a certain extent, the number of hours worked and the long idle hours when orders do not arrive—indicate a production organization quite different from the Foxconn labor management practices in China or Europe.

Moreover, the workers actively contribute to shape and mold the mobility regime. On the one hand, the intra- and inter-firm space reconfiguration brings about more intensive workforce exploitation, as family and personal life undergo drastic compression, and the workers have to move from one workshop to another so that operations are organized without lulls and staff time can be economized. On the other hand, mobility partially frees workers from previous pressures experienced in the workplace, while the productive regime adds pressure to move.

This situation, to a certain extent, complies with workers' aspirations to upward economic mobility, both in terms of access to self-employment and in terms of affluence. Mobility also functions as leverage for better working conditions. By moving from one place to another, workers learn which places are better and why, and are in a better position to grasp newly emerged opportunities. Thus, the reorganization of workers' stasis and mobility not only favors the constant creation of profit, but it also favors workers' aspirations to upward mobility, providing the framework within which workers can have significant agency.

New features of labor are therefore neither simply the way in which global capitalism or neoliberalism glide in the locality nor only the outcome of migrant agency. Shifts in the global fashion industry, the Italian state-nation's reaction to these shifts, together with migrants' determination to forge a place for their own, all concurred to shape the flexible accumulation drive as it has taken form in the last decades in the Italian fashion industry.

Skilled and Unskilled Workers

In this and the following sections I provide further evidence of the mobile regime by analyzing the recent job market demand and supply on the Internet and comparing it with the findings from fieldwork in 2012-2014.

Chinese workers in factories run by co-nationals are paid either by piece-rate or on a monthly basis, depending on level of production, type of work and skills. Fieldwork conducted in Prato in 2002, Carpi in 2004, and the Veneto region in 2006 provides data on workers' earnings (Table 1).

A *shougong* is a worker that has acquired basic skills and can iron and sew, but not expertly. *Shougongs* are paid either by piece or as a fixed wage. A *chegong*, or a skilled worker, is paid by piece.

Table 1: Estimates on wages in Prato, Carpi and Veneto in different years

Wage	Prato district 2002 (Ceccagno 2003)	Carpi district 2004 (Spinner 2005)	Veneto Region 2006 (Wu 2008)
<i>Zagong</i> Monthly wage	€ 400-500 monthly		€ 500-700
<i>Shougong</i> Piece-rate wage or monthly wage	€ 600 per month	€ 600 per month	-
<i>Chegong</i> Piece-rate wage	€ 7,500-10,000 per year	€ 8.400 per year	€ 900-1,100 per month
Highly-skilled workers <i>Baodi</i> wage	-	-	€ 3,000

Monthly salary, instead, applies to unskilled workers – known as *zagong* or odd job workers – and highly skilled workers, whose wage is called the *baodi* wage. *Zagong* workers are responsible for a number of jobs, including cooking meals for all staff and family members of the employers living on the workshop premises, cleaning, loading and unloading, and cutting threads after the skilled workers have finished. Depending on the size of the firms, there is at least one *zagong* per workshop.

The *baodi* wage for highly skilled workers has only emerged in the last decade, and in itself it provides evidence of the mobile regime as it is meant to remedy to the deleterious effects on employers of highly-skilled workers' frantic territorial mobility.

The New Bargaining Power of Skilled Workers

In the 1990s, the sleeping regime had contributed to legitimize a type of paternalistic working relationship inside the workshop, as illustrated in a statement by a Chinese contracting workshop owner interviewed in Prato in 2002:

The larger the workshop the more complex it is to manage it. We do not have managers, and the owners have to deal with all employees' aspects of life. We provide food to workers, take care of their flu, call the doctor. [...] Recently, for renewing their permit of stay, workers are required to document that they have a flat where they live, and so I am the one that has to take care of finding a [fake] residence for everybody. Our job as the business owners includes being the workers' moms and daddies. We often joke about this among ourselves (Ceccagno, 2003).

Researchers have accounted for Chinese workers' high vulnerability vis-à-vis their employers, highlighting that it is mainly related to the type of premises on which they work (Ceccagno, 2003; Wu, 2008; Wu & Liu, 2012). However, data from my fieldwork in Prato in 2012-2014 reveals preliminary evidence of new trends (Ceccagno, 2012).

First, the productive systems can no longer count on the constant inflow of migrant workers from China. While a gloomy socioeconomic climate prevails in Italy, China is becoming a major immigration country. By now, opportunities in China are more attractive, realistically available and less risky. These changes are at the basis of a reduction in out-migration from

China, at least for some types of migrants. This shift may have a lasting impact on the overall functioning of the Italian fashion industry.

Second, in Italy over the years, employment as workers in stitching workshops has become less and less glamorous and rewarding when compared with opportunities in the trade business emerging in the early 2000s and also with more recent—and more modest—forms of employment, such as being the owner of a coffee bar or a hair salon. By now, far fewer Chinese migrants are willing to work in manufacturing.

As a result, labor supply does not meet labor demand anymore. Evidence from the fieldwork in 2012-2014 shows that workshops mainly need skilled workers, but most of the available workforce is comprised of unskilled workers.

Third, these shifts seem to have altered the relative bargaining power of employers and skilled workers. Chinese employers now understand workers as being in a position of strength that enables them to dictate conditions, both in monetary terms and in terms of board and lodging, as revealed in an interview with a Chinese employer in 2013 in Prato:

When I was a worker I had to bear hardships. Now everything has changed. Employees by now [...] tell you what they want to have for dinner, and food is wasted. They threaten to report to the police straight away if they are mistreated. So, the employer is easily blackmailed...I wonder who exploits whom. It seems to me that by now those exploited are not the workers, but their employers. In certain respects, the employers dance at the employees' tune. For sure employers are not in a position to dictate the number of working hours to employees, they lack the strength to do it. And workers quit without even a day notice. Employers now are required to practice the traditional virtue of benevolence (rén). They have to respect their workers as if they were their parents. This is what most employers say nowadays. (First generation male employer)

This shows the inter-relationship between exiting behavior adopted by workers and its impact on the labor process (Smith, 2006).

The Internet Job Demand and Supply

In order to verify whether and to what extent the mobility regime is widespread, and how it changes the bargaining power of employees, I have collected previously untapped data on the job market among the Chinese migrants active in the manufacturing businesses in Italy through posts on *Huarenjie*. This is a website operated by Chinese migrants where advertisements are posted by potential employers and employees.

This data on job demand and supply among the Chinese migrants in the fashion industry mainly focuses on Prato. In fact, with its 5,340 Chinese-run businesses (CCIAA, 2014), Prato is a crucial European hub for Chinese migrants.

In the first years of settlement, Chinese workers were mainly recruited by word-of-mouth and via the interpersonal network of relatives and co-nationals. Over time, however, more impersonal channels have partially substituted for social networks. Research shows that in Prato in the mid-2000s, channels included 1) hand-written and printed notices plastered on

an outside wall on the Chinese commercial businesses area; 2) an electronic job display placed in the window front of a Chinese supermarket in the same area; 3) classified sections of Chinese newspapers on sale in Italy (Flanders, 2009).

More recently, however, jobs are increasingly matched with workers through *Huarenjie*, the Chinese language website. Labor demand and supply in the website's section "Job demand and supply in contracting and manufacturing firms" was monitored for nine days, from June 3 to June 11, 2015. The most striking feature that emerged was the vast imbalance between labor demand and supply. This is particularly evident for the position of skilled workers.

On June 11, for instance, 195 ads were posted by employers in Prato looking for skilled workers (*chegong*), while only five skilled workers in Prato posted their ads for this position. On the same day, ads in other Italian fashion areas were much more limited. At the national level, 374 ads looking for skilled workers were posted while only seven workers (including the five in Prato) looked for this position.

A much more limited number of potential employers looked for unskilled workers, ironers and *zagongs* in the monitored days. In Prato, the number of employers looking for unskilled workers ranged from eight to 41, with a maximum of four ads posted by unskilled workers seeking work. On June 11, the 16 advertisements looking for ironers were matched by only four ads by ironers. Meanwhile, ads by employers looking for *zagongs* amounted to 28, but only four workers looked for jobs as *zagong*. On the same day, at the national level, 88 ads looking for *zagongs* were posted, while only four workers looked for this job.

The imbalance between demand and supply was less pronounced for positions in final-good firms (see Table 2)⁴.

Table 2: Prato's labor demand and supply on *Huarenjie* website (June 11th, 2015)

	Demand	Supply
Skilled workers (<i>chegong</i>)	195	5
Unskilled workers (<i>shougong</i>)	41	4
Odd jobs (<i>zagong</i>)	28	4
Ironers	16	4
Modelists (<i>moteshi</i>)	13	4
Pattern positioning operators (<i>paibanshi</i>)	12	4
Cutters (<i>caijiangong</i>)	11	4

Data emerging from monitoring the website's job market shows a vast imbalance between demand and supply, and this imbalance is particularly striking for skilled workers. This is in stark contrast to findings on the Prato job market in 2007-2008, when a sufficient labor supply was available and employers did not need to compete for staff (Flanders, 2009).

⁴ Ironers can work for contracting firms and also for final-good firms.

The Shifting Balance of Power

The content of the advertisements reveal a shift of relative strength between employers and workers. Ads by workers seeking positions not only are very few, but they are mainly posted by unskilled workers or by people with specific skills, such as machine repairing. A couple of skilled workers that posted ads during the monitored period required that the workshop not rush for completing orders and the employer offer a nice working environment.

One ad posted on June 4, 2015 offers a glimpse into the condition of those vulnerable workers who cannot count on skills, nor on legalization or place of origin as assets that facilitate their inclusion in the job market:

I am a 34-year-old male from Henan without permit of stay. I have spent two years as unskilled ironer and now wish to learn to become an expert ironer. I am willing to endure hardship and work hard in order to learn. I hope that a well intentioned employer offers this opportunity to me. The salary's amount does not matter! (Job seeker)

Employers competing with each other to attract workers, instead, stress the good working and living conditions they offer. Living conditions include “a pleasant working environment,” Internet connection and air-conditioning. The best conditions are offered in ads targeting skilled workers. One ad, for instance, offered an environment with sociable skilled workers in order to entice other skilled workers to join them.

The sleeping regime is so intrinsic to the working environment that it is rarely mentioned in ads. Potential employers mention it when they hope to attract skilled workers by offering particularly attractive living conditions. For instance, skilled workers may be offered sleeping quarters close to but physically separated from the workplace.

Favorable working conditions include daytime only work and no rush to complete orders (*bu ganhuo*), as in the ad below posted on June 2, 2015 and targeting skilled workers:

Stitching workshop near the Coop [supermarket] in Prato looks for a couple of experienced skilled workers. Only specialized in trousers and skirts, simple and fixed models, daytime work, fixed time, no rush time. The workshop is next door from the living quarters, independent dwelling with Internet. (Employer)

Many potential employers stress that their workshops receive abundant and regular orders. The ability to attract regular orders, then, is crucial, as it reduces the risk of losing workers to competitors. For workers relying on a piece rate, regular orders imply higher earnings, reducing the need to move temporarily or permanently to other workshops.

A fair number of ads state the employers' preference for recruiting couples as work teams. This is one further move whereby employers in a constant struggle to tamper workers' mobility hope to prevent workers from easily leaving the workplace in search of better conditions.

To summarize, while the reconfiguration of the space highly increases the competitive edge of the Chinese suppliers, individual employers highly fear the workers' high territorial

mobility. In fact, many understand they are at risk of being abandoned by their best workers in the middle of the busy season.

The Internet job market does not represent the overall job supply and demand for Chinese workers in the fashion manufacturing industry. Future research will have to uncover how much the patterns identified in this preliminary research overlap with or differ from the dynamics prevailing in the overall job market. In any case, the findings presented here shed new light on employers/employees working relations.

The evident imbalance between demand and supply on the Internet job market, especially for skilled workers positions, points at a shortage of skilled workers in contracting businesses. In turn, this can be linked to the drying up of migration avenues in China and the declining attractiveness of jobs in manufacturing among the Chinese migrants in Italy. This imbalance coupled with the *baodi* salary for skilled workers and improved conditions offered in ads by potential employers make plausible the employers' claims of a shifting balance of power between employers and skilled workers.

Most crucially, the Internet job market confirms that labor in Chinese fashion firms is centered around the mobile regime based on the reconfiguration of the productive space through workers' intra-workshop stasis and inter-workshop mobility.

Conclusion

This paper offers a new conceptual framework for the analysis of the mode of emplacement of Chinese migrants in the Italian fashion industry. It focuses on the foundations upon which the mobile regime of the Chinese migrants in the Italian fashion productive architecture rests. I argue that the restructuring of social reproduction and workforce ethnicization are two key conditions to understanding the role played by Chinese migrants in the generation of profit.

This addition to the literature thus sheds light on a more profound layer of double manipulation of labor as the precondition for the existence of the mobility regime. By refusing to cast migrants from another country as ethnics, this paper investigates why and how a specific productive regime has become salient for the Chinese migrants active in Italy and for the productive organization of Italian fast fashion.

The mobile regime of the Chinese migrants in Italy is explained as the result of processes at different scalar levels: global capital transformations and the supply chains' ability to find ever newer ways for generating profit; national priorities and the relevant policies, especially implicit support to fast fashion needs; and multilayered employers/employees dynamics. By presenting and discussing preliminary findings on the recent job market on the Internet, this paper provides new evidence of the actual functioning of the mobile regime. It highlights the departure from previously prevailing working relations and points at ongoing shifts in the Chinese-run labor market.

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