

Nearshoring readiness: a readiness dashboard to navigate global value chain relocation

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Abstract

Purpose – This research proposes a readiness dashboard (RD) to evaluate national competitiveness in the shifting landscape of global value chains. It analyzes the transition from cost-centric offshoring to security-focused nearshoring and friendshoring, driven by post-pandemic geopolitical tensions.

Design/methodology/approach – The RD is a multidimensional framework that operationalizes national competitiveness with 32 variables structured across four pillars: institutions, infrastructure, integration and inputs, providing comparable metrics for 124 countries.

Findings – This study concludes that while infrastructure is necessary, institutional quality and deep trade integration are the primary factors in capturing trade diverted from the USA market. The inputs dimension remains the biggest challenge, while integration is a relative strength for lower-income countries. Focusing on the Americas, a region of one billion people with a gross domestic product of USD 34 trillion, the study highlights how strategic policy alignment can help Latin American countries capture a significant share of trade relocated from the US.

Originality/value – The research provides a strategic tool for policymakers to identify structural voids and design targeted policies that mitigate geopolitical risks while fostering long-term investment to orient businesspeople's investment destinations.

Keywords Nearshoring, Global value chains, Readiness assessment, Investment attraction, Location choice

Paper type Research article

1. Introduction

Nearshoring is not a short-lived trend but a permanent fixture of the global business ecosystem. Companies such as Hewlett-Packard, Boeing, Whirlpool and Nike have nearshored a substantial portion of their manufacturing operations from Asia to Mexico, Central America or back to the United States of America.

To become or remain attractive candidates for this shift, countries must implement several critical policies. Tax policy is vital. Time-bound accelerated depreciation can improve early cash flow and raise internal rates of return, as in the case of Mexico. Other incentives include

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predictable special regimes such as Costa Rica's Free Trade Zones and India's performance-based production incentives.

Regulatory policy is equally important, including one-stop investment licensing, as seen in Vietnam. Finally, workforce development – including training, upskilling and apprenticeships – acts as a major magnet for nearshoring. Costa Rica has leveraged this for medical devices, while Poland has used cluster strategies in auto parts, MedTech, electronics and aerospace to attract and retain foreign business.

Nevertheless, host country incentives alone are insufficient for nearshoring efficacy. Companies must first apply diagnostic tools to assess whether they qualify as candidates for nearshoring. If this is the case, they must develop a strategic plan and timetable, as in the case of General Electric, Stanley Black and Decker and Caterpillar.

2. Literature review

To understand nearshoring and the related concept of friendshoring, it is useful to examine their theoretical genesis. At the end of the 20th century, the world experienced a fragmentation of production that resulted in global value chains (GVCs). This transformation was driven by advances in information and communication technologies (ICT), which enabled cross-border coordination, trade liberalization that reduced costs and the firm's ability to specialize at different stages in different countries for efficiency.

The principles underlying GVCs derive from [David Ricardo's \(1817\)](#) theory of comparative advantage, which asserts that nations specialize in sectors where they possess a relative efficiency. Neoclassical advancements – particularly the Heckscher-Ohlin (H-O) model – linked trade patterns to factor endowments though empirical discrepancies, such as the Leontief Paradox ([1953](#)), required further refinement. [Samuelson's \(1948, 1949\)](#) factor-price equalization theorem subsequently demonstrated how trade integration equalizes factor returns across borders.

In the late 1970s, the new trade theory ([Krugman, 1979, 1980](#); [Helpman and Lancaster, 1982](#)) incorporated imperfect competition and economies of scale to explain intra-industry trade between similar economies. Complementing this, [Vernon's \(1966\)](#) product life cycle theory posited that innovation and initial production are concentrated in high-income countries before diffusing globally.

Contemporary research emphasizes micro-level dynamics and institutional frictions:

- (1) Firm heterogeneity: [Melitz \(2003\)](#) and [Bernard et al. \(2007\)](#) identified that trade gains are driven by highly productive firms, redefining competitiveness through industrial organization and microdata.
- (2) Trade in tasks: [Grossman and Rossi-Hansberg \(2008\)](#) theorized the global production process as a series of tradable tasks, while [Antràs and Chor \(2013\)](#) examined the role of contractual frictions in supply chain verticality.
- (3) Socio-political impacts: [Autor et al. \(2013\)](#) documented the localized labor market consequences of the China shock. Concurrently, [Grossman and Helpman \(1994\)](#) and [Rodrik \(2018\)](#) analyzed how the political economy and interest groups shape national trade policy.

Modern trade theory has transitioned from country-centric frameworks to multidimensional models encompassing firms, institutions and global networks. The rise of GVCs in the late 20th century was catalyzed by significant reductions in transportation, communication and logistical costs. Consequently, GVC participation has become a primary vehicle for governments to foster productive efficiency, facilitate knowledge transfer and integrate into global financial and labor markets.

Most of the companies active in GVCs in developing countries are small and medium-sized enterprises (SMEs), catalyzing both economic growth and the rapid diffusion of positive

socio-economic impacts. While this heightened interconnectivity has historically stimulated trade expansion, the disruption of specific nodes or mechanisms now has the potential to paralyze the entire global production system.

Since the COVID-19 “Great Lockdown”, geopolitical pressures have required the design of resilient, diverse supply chains (Lin and Lanng, 2020). Consequently, organizations such as the United Nations Conference on Trade and Development (UNCTAD, 2020) emphasize diversification, replication, reshoring and regionalization. These paradigms align with the second-degree relocations identified by Barbieri *et al.* (2019), where internationalized firms shift operations back to home countries (back-shoring) or proximate macro-regions (nearshoring). Such strategies prioritize GVC resilience through redundancy, despite potential cost increases.

Post-pandemic, political imperatives increasingly dominate economic logic (De Meyer, 2020). The World Economic Forum advocates that managers “aggressively explore possible near-shore options” to bridge the gap between supply chains and consumers (Betti and Hong, 2020). Ultimately, as Rodrik (2008) suggests, the fundamental debate has shifted from whether governments should intervene to “how” they will implement post-pandemic industrial policies.

Geopolitics is the driver behind this colossal change, with the current geopolitical agenda and “security” acting as prime factors hastening the process. As a result, both nearshoring and friendshoring are being actively considered (described below), involving a strategic pivot in how firms manage their production and supply chains. Instead of opting for the lowest-cost option, firms will increasingly select partners in countries that are geographically closer and politically, economically and socially aligned, leading to a rebirth of political economy dominance over economics.

2.1 Nearshoring and friendshoring

After decades of efficiency-driven globalization, geopolitical tensions and supply chain vulnerabilities have shifted policies toward resilience and long-term competitiveness. Nearshoring and friendshoring have emerged as primary instruments of this strategy. Nearshoring involves outsourcing business processes to nearby countries. This differs fundamentally from offshoring (relocating to distant countries) and onshoring (repatriating operations) (Piatanesi and Arauzo-Carod, 2019).

Recent systematic reviews distinguish nearshoring from friendshoring and back-shoring (Durán-Fernández and Stein, 2025). Pietrobelli and Seri (2023) propose a framework categorizing corporate decisions by location (shoring) and sourcing (boundary), highlighting nearshoring as a strategic middle ground between complete offshoring and full repatriation. The most extensive literature review on nearshoring and friendshoring, provided by da Rocha *et al.* (2025), structures theoretical perspectives and conceptual frameworks – including drivers and barriers – at the macro, meso and micro levels. A significant benefit of nearshoring is enhanced productivity through reduced logistical complexity and shorter lead times. Additionally, firms gain resilience against supply disruptions and geopolitical risks.

2.2 Impacts of nearshoring policies

At the macro level, nearshoring policies stimulate domestic and regional growth by attracting investment and strengthening industrial capacity near key markets. Empirical evidence shows that nearshoring hubs in North America and Europe have experienced faster manufacturing growth in the automotive, electronics and ICT sectors, among others (UNCTAD, 2024).

Structurally, nearshoring improves efficiency and resilience by reducing distance. Firms report 10–20% lead-time reductions and improved logistical reliability (OECD, 2023).

Proximity also enhances productivity through closer coordination, enabling better quality control and knowledge transfer. Mexico’s integration into North American electric vehicle and

semiconductor supply chains illustrates how nearshoring catalyzes innovation clusters ([World Bank, 2024](#)).

Increasingly, nearshoring integrates research and development (R&D) and production within a regional framework, encouraging process innovation and upskilling. Innovation corridors, such as Canada's main tech hubs, foster North American competitiveness. At the firm level, nearshoring partnerships result in 15–20% faster innovation cycles ([Boston Consulting Group, 2024](#)).

However, nearshoring faces criticism regarding trade diversion, as it may shift imports from more efficient global producers to less efficient regional ones. Labor concerns also persist; job creation does not guarantee high-quality, fair wages or safe conditions. Finally, logistical challenges remain if the nearshored country's infrastructure, such as energy grids and ports, is less developed than established offshoring hubs.

2.3 Friendshoring: a geo-strategic extension of nearshoring

Friendshoring deepens nearshoring by adding political and institutional dimensions to relocation. By ensuring secure access to essential goods and reducing exposure to adversarial nations, friendshoring increases strategic autonomy.

Furthermore, friendshoring expands innovation through cross-border R&D among allies. This is facilitated by easier talent mobility within trusted blocs, such as the Quad Alliance (2022), which aligns industrial and research policies between the USA, Japan, India and Australia. This introduces strategic selectivity, concentrating supply chains within bloc-based networks and realigning foreign direct investment (FDI) toward regional corridors.

While excluding efficient but non-aligned countries may increase costs, it strengthens reliability and mitigates geopolitical risk. However, this trend could deepen global polarization, potentially producing a “two-speed globalization” ([UNCTAD, 2024](#)).

2.4 Challenges of friendshoring

Despite its strategic rationale, friendshoring presents major challenges: it can lead to higher production costs in aligned but less efficient economies, reduced economies of scale from fragmented supply chains and inflationary effects. Depending on fragmentation levels, these factors could reduce global gross domestic product ([IMF, 2023](#)).

The strategy also faces infrastructure and capacity constraints. The risk of supplier concentration remains if friendly nations cannot meet demand, and many destinations suffer from infrastructure gaps and skills shortages in high-tech manufacturing ([OECD, 2024](#)).

Finally, innovation and competition concerns exist. Rival blocs may reduce knowledge spillovers, duplicate research efforts and foster protectionist biases that limit dynamism, creating “innovation silos” in a fragmented global economy ([Baldwin, 2022](#)).

2.5 Nearshoring, friendshoring and the USA policy

The United States of America is profoundly reconfiguring its global production networks. In North America, nearshoring enhances productivity for USA firms through reduced logistical complexity and greater integration, facilitating knowledge spillovers and specialization. Relocating production from Asia to North America can slash delivery times by 80% and inventory costs by 30–40%, significantly boosting total factor productivity ([McKinsey, 2023](#)).

While the USA and Latin America both prioritize these strategies, their motivations differ. The USA views nearshoring and friendshoring through the lens of national security and supply chain resilience. Policymakers aim to reduce dependence on adversarial nations – particularly China – by strengthening ties with politically aligned partners. Janet Yellen defined friendshoring as favoring trusted countries to achieve “free but secure trade,” prioritizing nations with stable relationships and shared values to build resilient supply chains ([IISS, 2022](#)).

substantial financial commitments back these goals. The CHIPS and Science Act (2022) allocated over USD 50bn for semiconductor manufacturing, while the Inflation Reduction Act (2022) provided credits to reorient mineral supply chains toward Western Hemisphere partners (Blakemore and Ryan, 2022). Shoring up supply chains remains a permanent national priority (Haar, 2022). Consequently, supply chains are now viewed as “critical infrastructure.” The Promoting Resilient Supply Chains Act seeks to establish a working group to monitor vulnerabilities in strategic sectors, such as semiconductors, pharmaceuticals, and clean energy (Ellison and Kaye, 2025). For instance, Intel invested USD 1.2bn in Costa Rica, and Taiwan Semiconductor Manufacturing Company committed USD 100bn to USA chip plants (Edelen, 2024).

Conversely, Latin America views these trends as unprecedented opportunities for industrialization and growth. The region positions itself as the natural beneficiary of USA–China decoupling. The Inter-American Development Bank (IDB, 2022) estimates that nearshoring could add USD 78bn in annual exports to the region, with Mexico and Brazil as primary winners. Competitive advantages include geographic proximity, cultural compatibility, lower labor costs and favorable trade agreements. Mexico, Costa Rica, Colombia and Brazil stand to gain most, particularly in the automotive, electronics, and information technology industries.

Success depends on addressing persistent hurdles. The USA must balance security with economic efficiency and define clear criteria for “friends.” The upcoming United States of America–Mexico–Canada Agreement review offers a chance to optimize rules of origin and regional labor protections (Meltzer and Esper, 2025). Latin America must accelerate infrastructure development, strengthen regulations and navigate the tension between attracting Chinese investment and maintaining preferential USA market access. Ultimately, this represents a unique opportunity to reconfigure the hemisphere into a more productive, inclusive and democratic region.

3. Method

To maximize the benefits of nearshoring while mitigating risks, a comprehensive, long-term strategy consisting of three pillars is needed:

- (1) Pillar 1: Identifying strategic value chains whose disruption has significant costs;
- (2) Pillar 2: Detailed mapping of regional potential and gaps, which the readiness dashboard (RD) addresses and
- (3) Pillar 3: Joint efforts to enhance infrastructure, workforce training, and business networks within a framework of the rule of law.

The RD is a control panel to evaluate variables influencing a country’s attractiveness for nearshoring. It also highlights weaknesses that must be overcome. The RD is structured around four key dimensions that capture the main determinants of a country’s nearshoring readiness: institutions, infrastructure, integration into global supply chains and inputs. Each dimension aggregates a set of normalized variables representing distinct but complementary aspects of nearshoring readiness. Finally, these four dimensions are aggregated into a single composite score.

The RD follows the OECD/JRC (2008) handbook framework for composite indicators. Indicators were selected based on relevance, comparability, coverage, recency and quality. To ensure comparability, highly skewed variables were log-transformed before being normalized to a 0–10 scale using Min–Max scaling.

The overall RD score uses arithmetic aggregation with equal weights. Normalized variables are averaged within four core dimensions, and those dimension scores are then averaged to produce the final score. This transparent and reproducible approach avoids subjective assumptions about indicator importance while preserving the multidimensional nature of nearshoring readiness.

The conceptual rationale for selecting these four specific dimensions – institutions, infrastructure, integration and inputs – stems from a deliberate structural shift away from traditional, cost-centric offshoring location models toward security and resilience focused nearshoring assessments. In a post-pandemic global economy governed by heightened geopolitical risks, corporate investment selection criteria have transitioned from seeking the lowest absolute labor or fiscal costs to prioritizing supply chain redundancy and systemic reliability. By evaluating national readiness through this four-dimensional lens, the dashboard captures a balanced interplay between enabling conditions (the regulatory “rules of the game” and the physical and/or digital logistical platforms provided by institutions and infrastructure) and outcome-oriented capacities (the active trade networks and resource pools quantified by integration and inputs). Furthermore, the architecture of these dimensions serves as a methodology driven filter designed to maintain global comparative integrity and policy relevance. Consequently, these four isolated dimensions represent a robust, data-driven framework where variables are selected based on strict criteria of nearshoring relevance, cross-country methodological alignment and open-access spatial integrity.

The grouping of variables within these four dimensions allows for a comprehensive and multidimensional assessment of performance, reflecting both enabling conditions and outcome-oriented factors and allowing three levels of approach:

- (1) Country: giving a comparable score of the country’s readiness performance;
- (2) Dimension: giving a comparable metric of the dimension’s readiness performance and
- (3) Productive activity: allowing a rebalancing of the weight of the different components of each dimension by its relevance for productive activities.

The RD’s guiding principle ensures that all metrics are data-driven, rigorous, transparent, reproducible and easily interpreted. By simplifying complex data into comparable indicators, the RD assesses nearshoring readiness on a scale from 0 (weak) to 10 (strong). The four dimensions aggregate variables representing distinct, complementary aspects of capacity, providing a comprehensive, multidimensional performance assessment. Below is the justification of each dimension and the variables used to measure them (methodological details in [Supplementary Material](#)):

3.1 Dimension 1: institutions (i1)

Strong, stable institutions are fundamental for minimizing political and regulatory risks. It is measured through 10 items: property rights, judicial independence, rule of law, control of corruption, regulatory quality, political stability and absence of violence and/or terrorism, regulatory restrictiveness, labor freedom, financial freedom and bureaucratic burden.

3.2 Dimension 2: infrastructure (i2)

Robust and efficient infrastructure is essential for the timely and cost-effective movement of products (raw and finished), which are key drivers for nearshoring decisions. It includes seven items: ground and port infrastructure, air transport infrastructure, drinking-water services, sanitation services, energy, digital development and telecommunication infrastructure.

3.3 Dimension 3: integration into global supply chains (i3)

High integration means that a relocating company will not have to build an entire supply chain from scratch. This dimension assesses the degree to which an economy is embedded in international trade networks and supply chains, including six items: economic complexity, logistic performance, openness to trade, exports, imports and import content on exports.

3.4 Dimension 4: inputs (i4)

Reliable access to the right inputs is non-negotiable for production. This dimension focuses on the quality and availability of human, financial and innovative resources necessary to sustain nearshoring activities and it includes nine items: human capital, talent readiness, financial ease, financial access (for SMEs), tax favorability, innovation, entrepreneurship, production and productivity.

4. Results

The RD assesses the national competitiveness of 124 countries across 4 dimensions: institutions, infrastructure, integration and inputs, thereby enabling a detailed analysis of the specific variables that comprise each of them. Furthermore, the RD can be utilized in reverse, that is, by starting from the critical requirements of a specific productive activity, to identify which countries – both globally and regionally – exhibit the most significant strengths or weaknesses. This, in turn, allows the dashboard to be used effectively to detect specific gaps requiring intervention.

4.1 Metrics

- (1) Income-based performance (based on the World Bank classification): Data analysis shows a linear relationship between economic status and readiness. High-income countries lead with an average score of 6.74, while low-income countries average 3.28 (Figure 1).
- (2) Development and regional performance (based on the International Monetary Fund classification): Advanced economies lead globally with an overall score of 7.08. In contrast, Sub-Saharan Africa records the lowest readiness at 3.91, followed by Latin

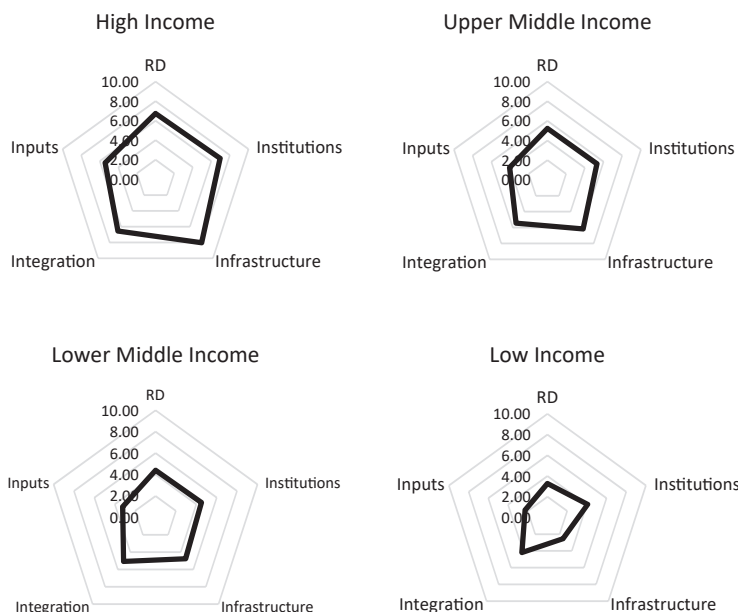


Figure 1. Readiness dashboard and dimension results by income groups (following World Bank classification).
Source(s): Authors' own elaboration

America and the Caribbean at 4.91 and emerging and/or developing Asia at 4.98 (Figure 2).

- (3) Infrastructure disparity: The infrastructure dimension exhibits the greatest variance. High-income countries score 8.03, compared to 2.55 for low-income countries. This gap highlights an infrastructure and institutional divide, where advanced regions possess the foundational stability and physical assets necessary for rapid implementation, while developing regions remain below the midpoint of the scale.
- (4) Inputs challenge: The inputs dimension is the weakest globally across all income levels, with a global average of only 4.29. Even in advanced economies, this is the lowest-rated dimension at 5.79.
- (5) Integration strength: The integration dimension appears to be a relative area of resilience for lower-income groups. For instance, low-income countries score higher in integration (4.19) than in any other category.

5. Discussion

The results of the RD provide critical insights into the structural barriers and opportunities for GVC relocation. Table 1 presents the comprehensive empirical results of the RD across the sampled countries, arranged in alphabetical order by country, detailing both the final composite RD index and the individual scores for its four constituent dimensions: institutions, infrastructure, integration and inputs. All scores are normalized on a standardized [0–10] scale, where higher values indicate a superior host-country environment.

The data suggest that economic resources are directly correlated with the foundational elements of readiness. Lower-middle and upper-middle income groups remain in a transitional state, having established basic frameworks but lacking the robust physical and institutional capital found in top-tier economies. While infrastructure remains a primary bottleneck for

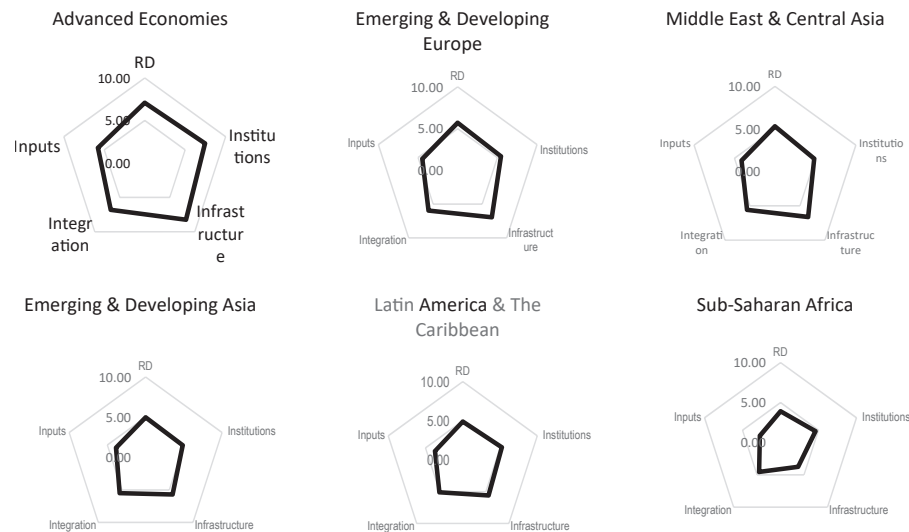


Figure 2. Readiness dashboard and dimensions results for regional and development groups (following International Monetary Fund classification). **Source(s):** Authors’ own elaboration

Table 1. Nearshoring readiness dashboard (RD): country results and dimensional scores

Country	RD		Institutions	Infrastructure	Integration	Inputs	Country	RD		Institutions	Infrastructure	Integration	Inputs
Angola	3.85	4.40		3.63	5.08	2.30	Kuwait	5.75	5.28		8.06	5.52	4.14
Albania	5.24	5.68		6.03	5.09	4.16	Lao People's Democratic Republic	4.09	3.91		4.28	5.19	2.98
United Arab Emirates	6.96	5.97		8.82	7.48	5.57	Lebanon	4.39	3.88		4.33	6.09	3.27
Argentina	4.97	5.36		6.22	4.79	3.49	Sri Lanka	4.57	4.58		5.63	4.55	3.53
Armenia	5.36	5.56		5.63	5.94	4.29	Lithuania	6.69	7.27		7.84	6.66	5.00
Australia	7.06	8.12		8.06	5.80	6.27	Luxembourg	7.58	8.07		8.40	7.28	6.57
Austria	7.44	7.85		8.58	7.12	6.21	Latvia	6.45	7.02		7.48	6.81	4.51
Azerbaijan	5.17	4.70		6.70	5.30	3.98	Morocco	5.34	5.58		6.50	5.81	3.46
Belgium	7.16	7.33		8.26	7.17	5.90	Moldova	5.16	5.44		5.95	5.22	4.03
Benin	3.67	4.71		3.13	4.17	2.68	Madagascar	3.23	4.40		2.23	4.26	2.04
Bangladesh	4.08	4.18		4.93	4.37	2.83	Mexico	5.38	5.44		6.07	6.13	3.88
Bulgaria	6.07	6.16		7.22	6.20	4.71	North Macedonia	5.39	5.75		5.26	6.42	4.14
Bahrain	6.23	5.30		8.34	6.84	4.43	Mali	3.32	3.39		2.99	4.63	2.26
Bosnia and Herzegovina	5.44	5.49		6.07	6.07	4.12	Malta	6.66	6.18		8.02	6.96	5.48
Belarus	5.71	3.65		8.76	6.31	4.12	Montenegro	5.67	5.84		6.58	5.98	4.29
Bolivia	4.23	4.29		4.46	4.36	3.82	Mongolia	5.16	5.74		5.47	5.29	4.16
Brazil	5.30	5.88		6.38	5.23	3.71	Mauritius	5.92	6.72		6.82	5.63	4.48
Botswana	5.01	6.39		5.24	5.12	3.30	Malaysia	6.37	5.87		7.87	6.89	4.83
Canada	7.15	7.68		7.97	6.45	6.49	Namibia	4.91	5.94		5.04	5.44	3.21
Switzerland	8.01	8.16		9.00	7.80	7.09	Nigeria	3.74	3.75		3.61	4.81	2.79
Chile	6.24	6.94		7.67	5.73	4.62	Nicaragua	3.98	3.41		4.25	5.09	3.17
China	5.77	4.48		7.48	5.89	5.23	Netherlands	7.60	7.95		9.01	7.47	5.99
Cote d'Ivoire	4.20	4.52		4.26	5.35	2.64	Norway	7.27	7.87		8.91	6.62	5.69
Cameroon	3.37	3.41		3.40	4.26	2.42	Nepal	3.93	4.25		3.73	4.11	3.63
Colombia	5.00	5.55		5.53	5.30	3.62	New Zealand	6.84	8.22		7.78	5.98	5.37
Costa Rica	5.84	6.94		6.05	5.93	4.44	Oman	5.92	5.53		7.51	6.06	4.59
Cyprus	6.36	6.21		7.58	6.67	4.96	Pakistan	3.93	3.47		4.53	4.76	2.94
Czechia	6.94	7.51		8.05	6.86	5.34	Panama	5.54	5.58		6.59	5.57	4.44
Germany	7.33	7.61		8.68	7.14	5.87	Peru	5.20	5.65		5.73	5.40	4.01
Denmark	7.72	8.42		8.83	7.26	6.37	Philippines	5.02	5.00		5.68	5.93	3.48
Dominican Republic	4.95	5.43		5.50	4.93	3.92	Poland	6.51	6.52		8.00	6.46	5.08
Algeria	4.32	3.92		6.10	3.94	3.32	Portugal	6.86	7.38		8.15	6.33	5.59
Ecuador	4.50	4.76		5.44	4.61	3.18	Paraguay	4.81	5.23		5.30	5.06	3.66
Egypt, Arab Rep.	5.01	4.49		6.51	5.35	3.70	Qatar	6.33	5.98		8.60	5.68	5.07
Spain	6.99	7.24		8.68	6.43	5.59	Romania	6.12	6.32		7.27	6.31	4.56
Estonia	7.05	7.79		7.95	6.90	5.58	Russian Federation	5.23	3.33		7.97	4.81	4.80
Ethiopia	2.41	2.98		2.52	1.91	2.23	Rwanda	4.25	5.38		3.74	4.89	2.98
Finland	7.34	8.26		8.31	6.80	5.97	Saudi Arabia	5.93	5.17		7.82	5.96	4.76
France	7.16	7.37		8.58	6.58	6.11	Senegal	4.26	4.73		4.00	5.49	2.81
United Kingdom	7.34	7.75		8.89	6.78	5.94	Singapore	8.10	8.07		9.14	8.54	6.66
Georgia	5.73	6.16		6.03	5.58	5.14	El Salvador	4.81	4.97		5.30	5.44	3.55
Ghana	4.36	5.25		4.38	4.64	3.19	Serbia	5.60	5.59		6.14	6.11	4.57
Greece	6.23	6.18		7.96	6.25	4.55	Slovak Republic	6.36	6.65		7.36	6.78	4.68
Guatemala	4.49	4.97		4.61	4.59	3.78	Slovenia	6.72	6.78		7.56	6.96	5.59
Honduras	4.50	4.69		4.59	5.40	3.31	Sweden	7.45	8.17		8.39	7.16	6.10
Croatia	6.37	6.61		7.14	6.48	5.24	Chad	2.14	2.68		1.37	2.80	1.69
Hungary	6.43	6.31		7.88	6.65	4.87	Togo	3.32	4.01		2.43	4.36	2.50
Indonesia	5.21	5.31		6.14	5.12	4.25	Thailand	5.68	5.36		6.45	6.48	4.43
India	4.99	5.16		5.64	5.38	3.78	Tajikistan	3.91	3.73		4.48	4.25	3.17
Ireland	7.44	7.84		8.02	7.72	6.19	Trinidad and Tobago	4.99	5.28		6.01	5.19	3.47
Iran, Islamic Rep.	4.48	2.64		6.74	4.20	4.35	Tunisia	5.30	4.79		6.33	6.48	3.61
Iceland	6.96	7.64		7.81	6.41	5.97	Turkiye	5.58	4.83		7.29	5.70	4.50
Israel	6.79	6.51		8.30	6.52	5.81	Tanzania	3.67	5.01		3.31	4.12	2.23
Italy	6.70	6.89		8.03	6.39	5.49	Uganda	3.39	4.64		2.55	4.23	2.15
Jamaica	4.83	5.55		5.92	4.63	3.23	Uruguay	5.85	7.15		6.53	4.95	4.75

(continued)

Table 1. Continued

Country	RD	Institutions	Infrastructure	Integration	Inputs	Country	RD	Institutions	Infrastructure	Integration	Inputs
Jordan	5.69	5.51	6.55	6.47	4.21	United States	7.25	7.63	8.80	5.85	6.73
Japan	7.26	7.60	8.87	6.75	5.80	Uzbekistan	5.20	4.62	6.72	4.68	4.78
Kazakhstan	5.40	5.28	6.42	5.43	4.46	Venezuela, Bolivarian Republic	2.80	1.80	3.57	3.32	2.49
Kenya	4.13	4.96	4.41	3.87	3.28	Viet Nam	5.33	4.84	6.23	6.28	3.97
Kyrgyz Republic	4.96	4.33	6.48	5.56	3.48	South Africa	5.35	5.69	6.46	5.88	3.37
Cambodia	4.52	4.42	4.60	5.88	3.18	Zambia	4.07	4.94	3.82	5.09	2.44
Korea, Rep.	7.07	6.97	8.67	6.79	5.83	Zimbabwe	3.46	3.44	3.32	4.17	2.92

Note(s): Arranged in alphabetical order. All scores are normalized on a [0–10] scale, across the four pillars: institutions, infrastructure, integration and inputs

Source(s): Authors' own elaboration

regions such as Sub-Saharan Africa, it serves as a major strength for advanced economies and emerging Europe.

The relatively high scores in the integration dimension for lower-income countries suggest that these countries have successfully created integrated scaffoldings. These frameworks could serve as a springboard for growth if the underlying physical and resource-based gaps, specifically in infrastructure and inputs, are addressed through targeted policy.

The fact that the inputs dimension is a universal weakness indicates that the quality and availability of human capital, innovation and financial resources remain the most significant global barriers to nearshoring. Even high-income countries, which lead in all other areas, manage only 5.43 in inputs, while low-income countries fall to a critical 2.27. Addressing this gap is essential for developing regions to move beyond the midpoint of the readiness scale and capture trade diverted from established markets.

With a readiness score of 4.91, Latin America and the Caribbean face an infrastructure and institutional divide that must be closed to fully capitalize on USA nearshoring trends. Success in this region depends on leveraging existing trade integration to attract the investment necessary for upgrading physical assets and workforce inputs.

The country-level analysis within Latin America (Figure 3) reveals a significant performance gap between countries, led by Chile (6.24), Uruguay (5.85) and Costa Rica (5.84). These top-tier performers distinguish themselves through exceptionally strong institutional frameworks, with Uruguay leading the region with a score of 7.15. In contrast, Venezuela remains a notable outlier at the bottom with an RD score of 2.80, driven by a severe institutional collapse (1.80). Most other major economies, such as Mexico (5.38) and Brazil (5.30), fall into a middle cluster, where lower scores in human and capital inputs offset moderate infrastructure.

Across the entire region, inputs is consistently the weakest dimension, with nearly every country scoring below 4.0, except for Chile, Uruguay, Costa Rica, Panama and Peru. This indicates a systemic regional challenge in mobilizing the necessary resources, such as specialized labor or investment, to support digital or economic readiness. Interestingly, the infrastructure dimension shows the highest variability; while Chile excels with 7.67, countries such as Nicaragua and Bolivia struggle in the low 4s. This suggests that, while several Latin American countries are successfully building the institutional “rules of the game,” the lack of physical infrastructure and high-quality inputs remains the primary bottleneck preventing the region from reaching the readiness levels seen in advanced global economies.

The granular institutional analysis (Figure 4) for selected Latin American countries reveals that Uruguay (7.15) and Costa Rica (6.94) are the regional benchmarks for institutional stability, particularly excelling in judicial independence and political stability. Uruguay stands out as an outlier in its ability to manage control of corruption (8.15), a score nearly double that of most other major economies in the group. This high degree of institutional trust provides a more secure environment for long-term economic planning compared to peers such as Mexico

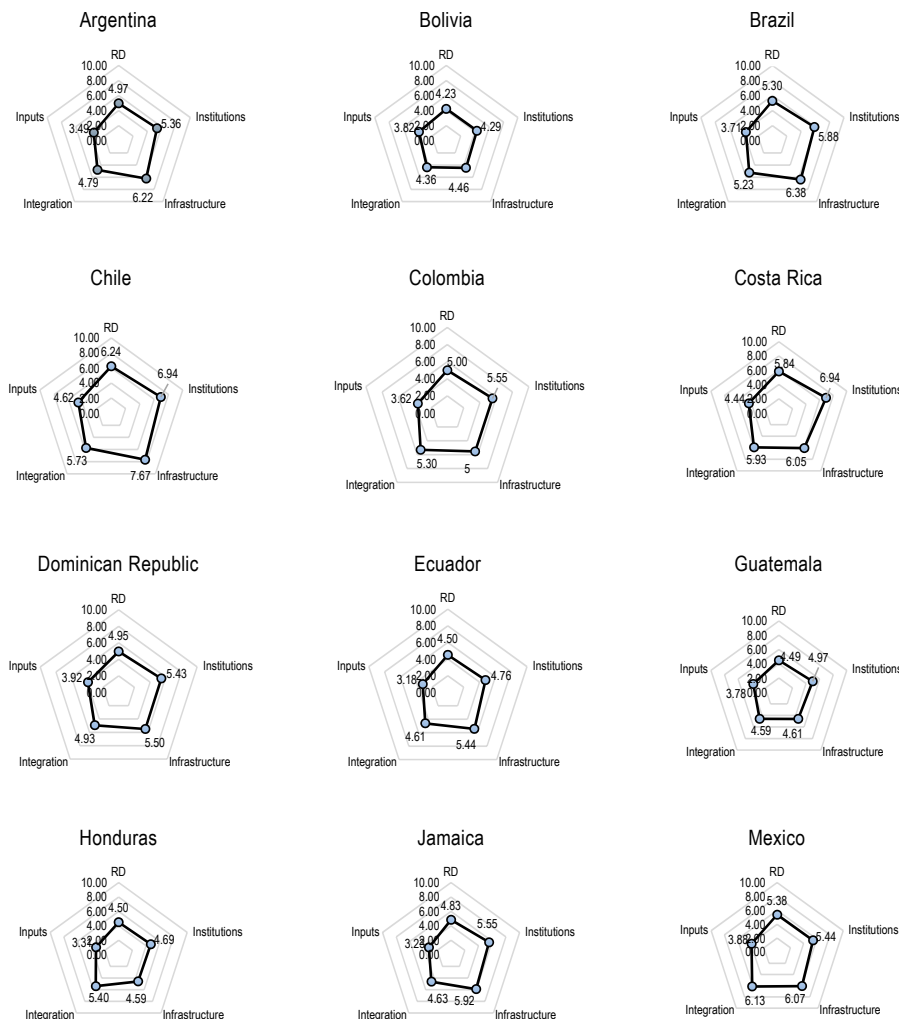


Figure 3. Readiness dashboard and dimensions scores for Latin America and the Caribbean. **Source(s):** Authors' own elaboration

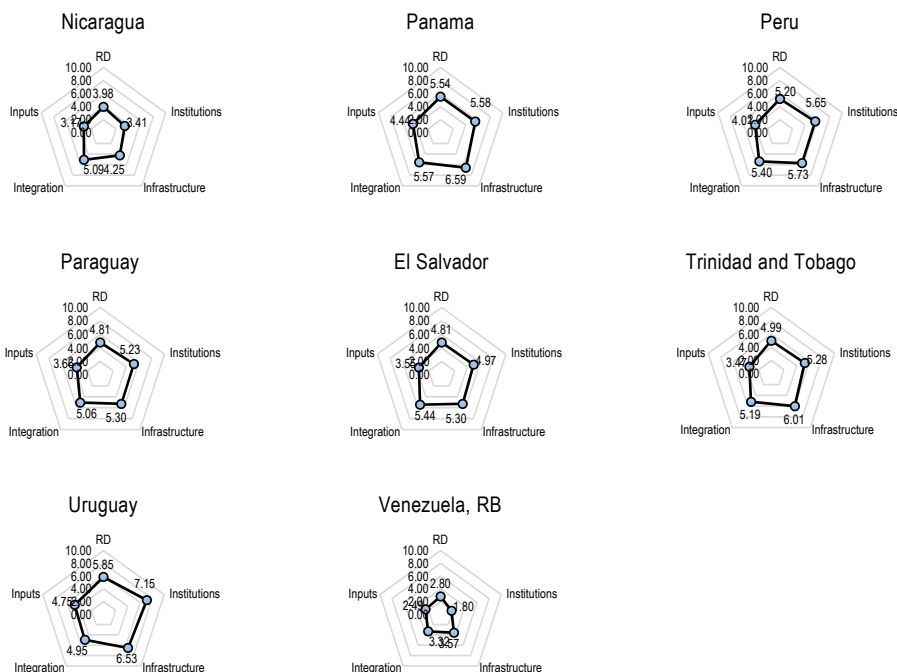


Figure 3. (continued)

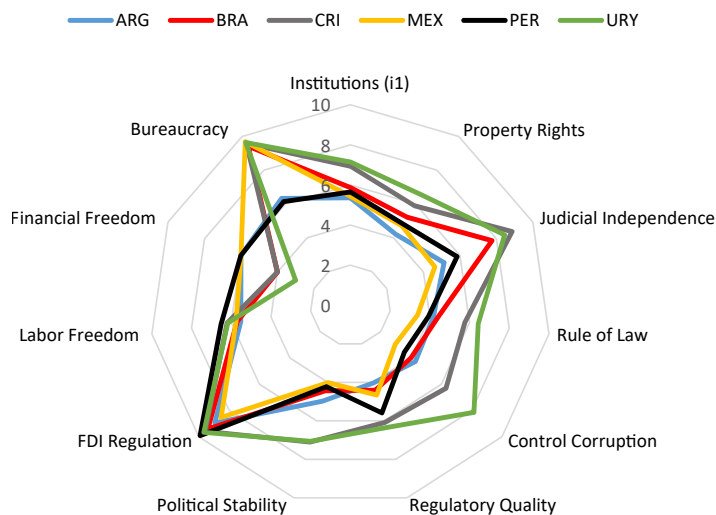


Figure 4. Readiness dashboard scores for the Institutions dimension (i1) and its variables for a selection of countries. Source(s): Authors' own elaboration

or Argentina, where lower scores in rule of law (3.39 and 4.18, respectively) point to significant legal and systemic vulnerabilities.

Interestingly, while Brazil and Mexico have larger economies, they struggle with high levels of Bureaucracy, though Brazil scores high in judicial independence (7.76). A shared strength across the entire group is FDI regulation, where every country scores above 8.50, with Peru leading at 9.91. This suggests that, while these countries are highly open to and well-regulated for foreign investment, the internal barriers, specifically Regulatory Quality and Property Rights, remain the primary differentiators that prevent middle-tier countries such as Peru (5.65) and Argentina (5.36) from reaching the top-tier institutional status held by Uruguay and Costa Rica.

On the other hand, the Infrastructure dimension analysis for selected countries (Figure 5) highlights a major divide between digital readiness and physical connectivity, with Chile (7.67) maintaining its regional lead. Chile's dominance is underpinned by nearly perfect scores in basic utilities, such as Water (9.88) and Sanitation (9.53), as well as a superior ICT framework (9.34). In contrast, Paraguay (5.30) and the Dominican Republic (5.50) trail the group, largely due to significantly lower scores in transportation and utility access. While the region is making strides in connectivity, the gap between high-performing southern economies and their northern or landlocked counterparts remains visible in the quality of core services.

A key takeaway from these data is that ICT and Telecom are the strongest components across all selected countries, with every country scoring above 7.40 in these areas. This suggests a regional success in expanding digital access, even in countries such as Peru and Paraguay that struggle with traditional physical infrastructure. However, Ground and Ports and Air Transport represent a critical weakness for the entire group, with scores as low as 1.73 for Paraguay and 2.84 for Peru. This indicates that, while Latin America is increasingly connected digitally, the high cost and low efficiency of moving goods and people physically remain the most significant barrier to integrated economic growth.

While a standardized, aggregate RD score offers a useful macrobenchmark, its deeper utility lies in transitioning from an average metric to a sector-specific diagnostic tool. By

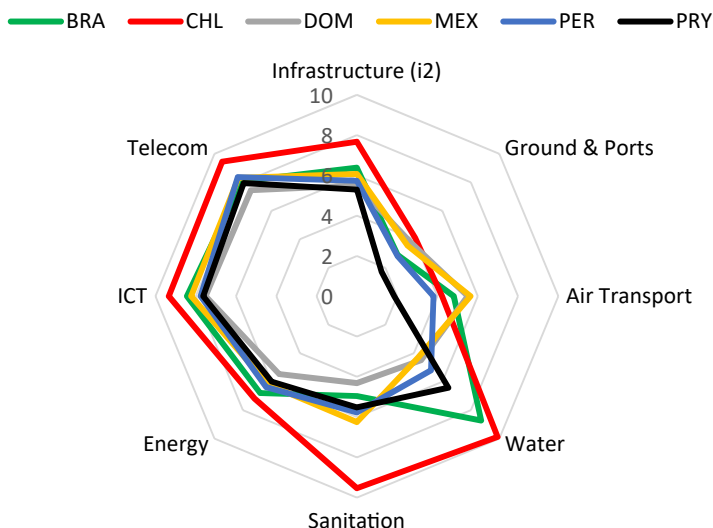


Figure 5. Readiness dashboard scores for the Infrastructure dimension (i2) and its variables, for a selection of countries. **Source(s):** Authors' own elaboration

rebalancing the weights of the 32 variables and 4 dimensions based on sector-specific criteria, users avoid the “trap of the average,” identifying optimal targets tailored exclusively to productive requirements. This customization is also useful for policymakers seeking to realign state resources to reinforce the variables that are critical to their nation’s intended productive vocation.

To illustrate this diagnostic power, this flexible weighting methodology can be applied to three highly distinct sectors: Research and Innovation, E-Commerce and Logistics, and Tourism. Each depends on a unique configuration of dashboard variables, demonstrating that a single country can simultaneously be a premier destination for one activity and entirely unviable for another.

Activities centered on Research and Innovation (R&D centers, software development, biotech labs) are detached from traditional manufacturing constraints such as shipping volumes or raw materials. Instead, they require sophisticated institutional safeguards and top-tier intellectual ecosystems. Consequently, Dimension 1 (Institutions) and Dimension 4 (Inputs) receive primary weight. Within Institutions, Property Rights and Judicial Independence are maximized to guarantee intellectual property protection. Within Inputs, Talent Readiness and Innovation are heavily weighted to ensure access to researchers and high-level professionals. In a second level comes Dimension 2 (Infrastructure), specifically Digital Development and Telecommunication Infrastructure, to ensure high-speed connectivity.

E-commerce and Logistics success is determined by velocity, predictable customs processing, and frictionless distribution networks. For these activities, Dimension 2 (Infrastructure) and Dimension 3 (Integration) take priority. Within Infrastructure, Air Transport, Ground and Ports, and Digital Development are heavily weighted to ensure multi-modal transit and real-time tracking. Within integration, logistic performance and trade openness receive maximum priority. Dimension 1 (Institutions) serves as a secondary focus, specifically Control of Corruption, to prevent shipping delays from illicit rent-seeking.

Tourism relies heavily on the physical entry of consumers, personal safety, and local services. Here, Dimension 2 (Infrastructure) takes precedence, specifically Air Transport and Digital Development for booking and hospitality services. Simultaneously, Security/Political Stability within Dimension 1 (Institutions) is heavily weighted due to the sector’s sensitivity to crime or unrest. Secondary priority is assigned to Dimension 4 (Inputs), emphasizing Labor Freedom and basic service-oriented human capital to ensure a flexible hospitality workforce.

This way, by modifying variable weights to match specific productive activities, the RD provides a dynamic decision matrix to locate ideal hosts based on precise operational needs, while simultaneously offering policymakers a strategic mirror to align state resources with their true national vocation and development goals.

6. Conclusions

The reconfiguration of GVCs represents more than a temporary reaction to the pandemic; it marks a structural shift toward a new era for international trade and global production. It is an era of strategic closeness or proximity where security and institutional trust are as vital as cost-efficiency.

For countries to remain attractive candidates for this shift, they must implement critical policies alongside regulatory reforms. Beyond fiscal incentives, a host country’s success depends on institutional robustness, infrastructure reliability, competitive industrial tariffs and robust workforce development through upskilling and cluster strategies. However, host country incentives alone are insufficient. Companies must also conduct internal diagnostics to assess their readiness and develop a strategic timetable to ensure production efficacy and quality. The synergy between corporate leadership and the host government’s ability to provide a business-friendly environment is essential.

The RD aims to help policymakers and investors gain a data-driven lens to navigate this transition, moving beyond political rhetoric to identify the concrete structural gaps in four dimensions – institutions, infrastructure, integration into global supply chains and inputs – which determine a nation's attractiveness. Furthermore, customizing the weightings transforms the RD into a dynamic decision matrix for targeted investment and a strategic mirror for policymakers to align state resources with national development goals.

For Latin America in particular, the current geopolitical environment offers a decisive window of opportunity. Success in this new landscape will only be achieved by deliberately aligning national policy with the rigorous demands of resilient, secure and integrated global production networks.

Ultimately, nearshoring readiness will depend on corporate leadership – vision, planning, management and resilience – and the host country's capability to provide the infrastructure, workforce and business-friendly environment to attract and retain inbound foreign investment and operations.

With a high degree of nearshoring readiness, companies and host governments can benefit from a winning formula that will reward both producers and consumers.

6.1 Key takeaways

- (1) There is a significant disparity in readiness levels across different global regions, primarily driven by high performance in Infrastructure by advanced economies.
- (2) The dimensions' scores indicate that inputs are the most significant hurdle regardless of income level.
- (3) Low-income countries have made progress in creating integrated frameworks that could serve as a springboard for growth if physical and resource-based gaps are addressed.
- (4) While most regions are making moderate progress in institutional and integration frameworks, the lack of quality inputs and basic infrastructure remains the most significant barrier to achieving higher overall readiness scores globally.
- (5) In Latin America, Chile, Uruguay and Costa Rica score highest among all dimensions.
- (6) The lack of physical infrastructure and high-quality inputs remains the primary bottleneck preventing the region from reaching the readiness levels seen in advanced global economies.
- (7) Uruguay and Costa Rica are the regional benchmarks for institutional stability.
- (8) While Brazil and Mexico have the largest economies, they struggle with high levels of bureaucracy.
- (9) When it comes to Regulatory Policy and Property Rights, Peru, Argentina, Uruguay and Costa Rica score highest.
- (10) Chile dominates in infrastructure, especially utilities, telecom and ICTs.
- (11) While Latin America is increasingly connected digitally, high costs and low efficiency of moving goods and people remain the most significant barriers to integrated economic growth.
- (12) To meet the specific needs of different industries, the RD avoids the "average trap" by customizing variable weights to identify optimal targets tailored exclusively to productive requirements.

6.2 Policy implications

The RD indicates that the nearshoring window of opportunity is time-sensitive. To capture and sustain these shifts, policymakers should focus on the following:

- (1) Institutional de-risking: Beyond tax incentives, governments must prioritize regulatory transparency and contract enforcement. For Latin American countries, reducing institutional voids is more critical for security-focused investors than lowering labor costs.
- (2) Infrastructure as a connectivity multiplier: Policy should shift from generic infrastructure spending to GVC-specific logistics.
- (3) Strategic trade alignment: The Integration pillar suggests that passive participation in trade blocs is no longer sufficient. Policymakers should pursue active geoeconomic diplomacy, aligning national standards to lower nearshoring barriers.
- (4) Human capital pivot: Under the Inputs pillar, economic policy should focus on specialized training. Success in high-value nearshoring depends on a workforce skilled in advanced protocols.
- (5) Governments can use the RD to identify their industrial vocation and surgically allocate resources to the specific variables that investors prioritize.

Supplementary material

The supplementary material for this article can be found online.

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