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Global restructuring and its effects on occupations: towards a new division of labor? ¹

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Abstract.

The following contribution considers whether global restructuring creates new forms of the division of labor. On the basis of empirical data from a comparative project in 14 European countries, the author supports the hypothesis that in addition to the ongoing process of the internationalization of work, there are 'hidden' effects at the local level. From the perspective of three occupational clusters, dynamics can be observed which have differing impacts on the occupational groups. Thus, there is a simultaneous process of restructuring and redefining skills, labor processes and the working organization which forms the daily reality of working men and women.

Keywords: Globalization, division of labor processes, occupations, quality of work and life

JEL codes: F0; J16; J61; M16; O15

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1 Introduction

Since the beginning of the 1990s, technological innovation particularly in the field of information technology has had a remarkable impact on the reorganization of global value chains. These restructuring processes have greatly strengthened new forms of a global division of labor. Although a few decades ago, the commutability of white-collar work seemed ‘untouchable’, technical expertise now offers options for off-shoring and outsourcing these activities. Thus, in recent years it has not only been assembly lines, but also knowledge-based activities such as software development, administration; and services which have been relocated to other places worldwide.²

On the basis of the empirical findings of the WORKS project³ the following contribution focuses on qualitative changes at the workplace level due to global restructuring. Here, a number of case studies were conducted in different sectors in many European countries. The results show that the effects felt by the various occupational groups from this trend towards globalized work are multifaceted. One central consideration is that work is increasingly being organized according to market demands, with customer needs causing peaks in work loads and leading to an intensification of work (Birindelli et al. 2007, Valenduc et al. 2007, Ramioul 2007, Flecker 2007b, Kratzer 2003). This seems true in nearly all the sectors under review, while the consequences for career paths, physical and psychological well-being, and future employment prospects differ enormously between various occupational groups.

On the assumption that new forms of division of labor during global restructuring should be considered as a complex and contradictory phenomenon (Huws et al. 2003), the following contribution greatly

² In academic literature, transnational corporations are discussed as particularly important actors in these processes. With regard to the factors driving globalization at an organizational level, there is general consensus on their growing dominance in this development (Hirsch-Kreinsen, 1998, Kotthoff, 2001).

³ In 2005, the European Commission funded a ground-breaking research project, Work Organization Restructuring in the Knowledge Society (WORKS) to investigate the restructuring processes of global value chains and their impact on organizations as well as on individuals. Combining theoretical work with a detailed analysis of a wide range of statistics and in-depth case studies, the team analyzed the forces that bring about these changes, including global value chain restructuring and the policy environment, and produced a series of publications highlighting different aspects of these changes: work organization, employer use of technology, skills and knowledge requirements, career paths, occupational segregation, and the quality of working life (for further details, see: <http://www.worksproject.be>).

emphasizes the qualitative differences between occupational groups in European countries. Thus, the objective is to show that, besides the ongoing process of internationalization of work, there are also 'hidden' changes at the individual level which have as yet only rarely been compared within Europe. Nevertheless, it seems that the ongoing emphasis on minimizing production costs as an overall trend of (economic) globalization occurs unevenly, and the extent to which both countries and occupational groups are integrated into the global economy differs greatly.⁴

2 Global restructuring and the international division of labor

The concept of a global division of labor is not new. At the end of the 19th century, 'the British Empire exhibited a remarkable developed pattern of regional industrial specialisation knitted together into a global trade network' (Huws 2006:16). In the 20th century, the growth of multinational corporations increased and, from the beginning of the 1970s, it became clear that a new international division of labor was being created. Large companies broke down their production processes into single subprocesses and redistributed these activities around the globe to countries where conditions were most favorable for them (Froebel, Heinrich & Krey 1977, Altvater & Mahnkopf 1999, Huws 2006).⁵

In the following decades this form of international division of labor was introduced in nearly all sectors, i.e. clothing, automotive, and electronic sectors.⁶ It was mostly developed countries which gave very strong political

⁴ See also McMichael 2000, UNDP 1999, World Bank 2001b.

⁵ From the perspective of the global system, historical processes of globalization are most often considered to be a continuous process of integrating regions and nations into the world market system (Altvater & Mahnkopf 1997, Münch 2005, Hack 2005, 2007). The concept of globalization thus reflects the potential extent of a world market and, at the same time, an immense enlargement of today's global communication, both of which seem far more tangible now than they did at earlier stages of this process (Nierling & Krings, 2008).

⁶ In all these processes, the issue of technology is having profound effects upon production processes in all economic sectors. With regard to the production sector, three major decisions have been involved in the production (see Dicken 2003:105 ff): (1) *Production techniques*: This decision concerns both the particular type of technology used and also the way in which the various inputs of production factors are combined. Obviously some production processes are more capital-intensive than others. But it always seems possible to vary the combination of labor and capital, or the use of technologies. Closely connected to the question of technology is (2) *the scale of production*: Generally, the average cost of production tends to decline as the volume of production increases. The scale range varies considerably from one

support to ‘free trade zones’, guaranteed various tax incentives, and suspended labor and environmental protection regulations in order to attract direct foreign investments (Huws 2006, Kaplinsky 1988). These processes pertained principally to blue-collar work, and the workers in these developed countries had and still have to face wages below subsistence level.⁷

The period from the early 1970s to the present, ‘has involved several major trends as capitalist processes and ideologies spread throughout the world’ (Pyle and Ward 2003:463). In terms of organizational restructuring, one major trend was and still is that multinational corporations in the manufacturing, service and finance sectors have moved into successive tiers of countries over the past three decades and have established burgeoning networks of subcontractors (Pyle 1999, Pyle and Ward 2003). Thus, skilled and even highly skilled activities – including research and development, service activities, and consulting activities – became the object of a new international division of labor. Here too, technological innovations, especially in the field of information and communication technology, played an important role in establishing organizational and social networks at different levels worldwide (Castells 1996, Hardt & Negri 2000, Bechmann et al. 2003).⁸

This development seems remarkable because for a long time white-collar work was considered ‘non-internationalizable’ (Boes & Kämpf 2007:194). But in fact, qualified work became the subject of outsourcing and relocating on a large scale and thereby lost a great measure of its elevated status.

From the perspective of a global value chain – as was developed conceptually by the WORKS project – these processes can be explained by the ongoing

industry to another. It is much greater, for example, in the automotive industry than in manufacturing clothes and garments. Therefore, scale and technique are intimately related with the (3) *production location*. The geographical production location is very much connected to technology and scale. Large-scale operations need access to large markets, and highly labor-intensive production processes need access to an extensive workforce. In order to decrease costs, this has increasingly involved a shift in supplies in developed countries.

⁷ Huws very strongly emphasizes the gender dimension of this development of the international division of labor, which has been discussed since the 1980s. Thus, especially in specific sectors such as the clothing sector, workers in these zones were disproportional young and female and had extremely insecure working conditions (Huws 2006, Chow 2003).

⁸ In debates on the new economy, it was widely agreed that the use of information and communication technologies reduces transaction costs and, therefore, makes it easier for companies to concentrate on their core competence and at the same time outsource other activities. Especially for SMEs, this would lead to advantages and new opportunities on the markets. Hence this organizational network would acquire the view that these organizational forms are no longer centered in multinational corporations, but are replaced by networks of SMEs. The corporations themselves would also have to reorganize their structure towards a web of multiple networks (Flecker 2007, Schienstock 2003, Castells 1999).

standardization of business processes generally due to the digitization of information and the development of communication networks.

‘In relation to these processes of codification, commodification, standardization and fragmentation, and the related decrease of transaction costs, the ‘primacy of the core business’ in managerial decision-making can be explained. Diversification of products and services induces the multiplication of tasks and skills and results in an organizational complexity that can no longer be combined efficiently with mass production. Outsourcing ... [as one instrument of global restructuring] ... is therefore a managerial solution that accommodates increased organizational complexity while maintaining cost effectiveness’ (Huws 2006:21, Huws 2007).

These processes of standardization cannot take place without changes in the use of human knowledge and professional skills. At the level of the division of labor there are basically two trends (according to Huws 2006:24, Auer et al. 2006, Parent-Thirion et al. 2007):

When new products and processes are being developed, creative workers are needed with a high level of skills and knowledge. As the development of standardization progresses, a more well-defined division of labor typically emerges with new occupational identities.

When new working processes are introduced to existing products or services, the division of labor is probably organized around different tasks, specific skills, and knowledge. These skills are covered by workers with different degrees of qualification. Here, restructuring processes mostly require new forms of systemization and standardization in the work loads, with upskilling and downskilling processes for the various occupations.

Thus, jobs may disappear in one location and appear in another. Job profiles may change with regard to qualification, skill demands, and career opportunities. Different tasks and knowledge demands are required and quite possibly filled by workers of different gender, age, and qualification.

According to Huws, the observable historical trend is that an increasing number of business functions of the value chains are considered by managerial decisions as ‘core’ or ‘non-core’ which means that more and more services and activities are shifted from the core to the periphery in the companies (Huws 2006:21, World Trade Organization 2005, Altvater 2007). Thus, cost differentials and up- and downgrading strategies are considered to be important factors in the shift to new forms of division of labor. These

strategies, combined with the rise of information networks, have created huge organizational complexity, which can be thought of as a gigantic web stretching around the globe. Therefore, it seems that the structure of the whole economy has changed considerably due to the fact that many organizations increasingly rely on suppliers, social and technical networks in the public and private sector as well as on the informal sector (Chow 2003, Flecker 2007a, Boes & Kämpf 2007, Sassen 2007).

Bearing these considerations in mind, the following results provide an insight into how the changes of global restructuring are perceived by different occupational groups. Here, the author emphasizes differences between how three occupational clusters are developed in the synthesizing interpretation of the project.

3 Description of the research field

The empirical findings are presented on the basis of the qualitative research of the WORKS project.⁹ From an individual perspective, changes in working and living conditions were analyzed in the occupational case studies. Apart from theoretical references, the occupational group as a focus of research is 'neither a collection of individuals nor an administrative category (socio-professional categories). It is the result of a process that has to do with 1) social organization, 2) the functioning of the labor market and 3) individual subjectivity (meanings of work). An occupational group is both a way of defining oneself and a social process' (Dubar in Valenduc et. al. 2007:16). In order to translate these demands, the WORKS method referred to biographies, professional careers, and the social construction of occupational groups. Thus, a range of issues was developed in order to make the case studies comparable (see Valenduc et al. 2007:16 ff).

The occupational case studies were conducted on the basis of in-depth methods in different occupations which were analyzed in companies of

⁹ The project design is based on several central topics: theories and concepts, quantitative research, qualitative research, policy, and social dialogue. The following results refer to the qualitative research which still is divided into organizational case studies and occupational case studies. The organizational case studies provide knowledge about changes in the organizational structure during restructuring processes, while the occupational case studies clearly focus on changes for the individual at an occupational level (Huws 2006).

various sizes and over a wide range of sectors.¹⁰ According to the project's concept, the aim was to record global restructuring processes at different times. The four sectors chosen were clothing, food, the public sector, and the IT sector.

While the *clothing sector* already performed major restructuring processes in the early 1970s (Dunford 2004), the *food industry* only started its European-wide restructuring in the 1990s after the single market was established in the European Union (European Foundation 2004). In the *IT sector*, internationalization strategies started during the industry's boom years in the late 1990s, and resulted in global off-shoring processes of IT services (Boes & Schwemmler 2005, Boes & Kämpf 2007, Flecker 2007a). Currently, in all countries represented in the sample, the *public sector* is facing massive restructuring processes towards privatization, which is causing deregulation of previously well-regulated working conditions (Nierling & Krings 2008).¹¹

As the WORKS project strongly focuses on changes in the knowledge-based society, one important criterion was to analyze occupational groups affected by changes in knowledge and skills requirements. Consequently, the sample was mapped into three clusters of occupational groups according to the criteria of knowledge-intensity and business functions. It includes, first, highly skilled, knowledge-based occupations (fashion and technical designers in the clothing industry as well as IT professionals). There are several aspects common to these groups in terms of creativity and work performance. Second, it investigates manufacturing workers (low skilled workers), including production workers in the clothing and food sector. These are characterized by a low level of knowledge intensity and a high standardization of working

¹⁰ The global value chain approach of the project includes the concept of business functions as units of the value chain. The selection of the occupations, therefore, is based on the definition of business functions (see conceptual approach Huws 2006). The following occupations are represented in the sample: designers in the clothing industry, researchers in ICT, skilled and semi-skilled production workers in the food and clothing sector, production workers in software development, skilled and semi-skilled workers in logistics in the food and clothing sector, front-office employees in customer services, IT professionals in IT service providers.

¹¹ Overall, 30 occupational case studies were carried out in 14 European countries, including 246 individual interviews. Each case study consisted of 8-12 semi-structured biographical interviews with employees of the occupations under investigation. The interviews lasted between 60 and 120 minutes and were conducted during working hours with the consent of the company management. The sample included the following countries: Austria, Belgium, Bulgaria, Denmark, France, Germany, Greece, Hungary, Italy, The Netherlands, Norway, Portugal, Sweden and the UK. The interview findings were summarized by the partners in case study reports which were structured around five central research topics. The topics were the following: work biographies and career, changes in occupational identities, quality of work, learning and skills development, work-life balance (reconciliation of work and family needs).

processes. Third, it considers service occupations (skilled and semi-skilled employees in logistics, the clothing and food sectors, and in the public sector). Here, the group is very heterogeneous and includes a high range of knowledge intensity. These groups are all facing enormous dynamic processes.

The overall findings for each of the occupational groups were compared cross-nationally, which led to a comprehensive picture of the impact of global restructuring on occupational groups. These clusters were compared according to the issues raised: increasing economic pressure, quality of work and quality of life and country differences (for details, see Valenduc et al. 2007).

4 The ‘hidden’ effects of global restructuring: empirical findings

The following examples outline three aspects of change at the workplace level. Obviously, this description only gives an impression of the results and does not claim to be a complete overview.

4.1 Increasing economic pressure

Increasing economic pressure has an impact on all occupational groups. As already discussed in academic debates, the key words here are the increase in production cycles and stronger orientation to the market. These changes have led to new demands for flexibility in all occupations, but the consequences have been different within the occupational groups.

In *highly skilled occupations*, these changes even have produced differences between the designers and the IT professionals. Through globalization, IT professionals have had to broaden their skills significantly to include social and language skills, management skills, and industrial applications. With regard to career paths and job opportunities, global restructuring has offered a broadening of the skill portfolio, which seems to be highly appreciated by employees. Due to these changes, the proportion of women in nearly all countries under review has increased, which has not changed organizational patterns, but to a certain extent the working culture.¹²

¹² With regard to the proportion of women there are significant differences between the European countries. In all countries, IT professions are basically male-dominated

By contrast, the occupational group of designers has had to cope with acceleration processes and a broadening of skills that have threatened their occupational identity as creative workers overall and worsened their working conditions in all countries. The economic pressure in the clothing sector also strongly influences the number of available jobs for designers.¹³ Nevertheless, designers still seem to identify strongly with their working content, which enables them to cope with rapid acquisition of new technical skills as well as with market demands.

For the workers in manufacturing or in *low-skilled occupations*, the increasing economic pressure is based on the general trend to relocate manufacturing processes either to subcontractors or to countries with lower wages. These strategies have led to an increasing demand for (mostly temporal) flexibility and at the same time an increasing subjective feeling of insecurity and powerlessness in the face of global processes. Particularly in the food sector, a differentiation within the working activities was considered. On the one hand, through the ongoing process of mechanizing workloads, trends are emerging towards more control and supervision functions in technology-based working processes. On the other hand, repetitive working activities are increasing, which are basically performed by women and/or ethnic minorities.¹⁴

Because of the great heterogeneity of *skilled and semi-skilled occupations* in the sample, there is a wide range of organizational models (privatization, off-shoring, outsourcing) which in sum create new temporal, contractual and organizational demands for employees. For example, in the public services the impact on occupations is different: modernization of public services, the establishment of different service provisions such as contact points, call centers or/and online services. Thus, in some cases the skill profiles and

occupations. But with the broadening of skills in many organizations, the female proportion of employees has increased in most countries. But whereas in Scandinavian countries there is considered to be a 'baby boom' among IT professionals due to the institutional framework, in Continental European countries particularly this branch is characterized by an extremely low birth rate (Valenduc et al. 2007, Krings 2006).

¹³ Especially in the occupational group of designers, acceleration processes can easily be documented by the increase of the number of collections per year. Whereas ten years ago, the companies offered two collections a year (winter and summer) nowadays medium-sized companies offer four collections and some small collections in between, and global corporations produce collections every six weeks (Birindelli & Rustichelli 2007).

¹⁴ The trends in manufacturing correspond with the academic debate which implies whether there are new production modes or not. Independent of this question the results show an ongoing process of mechanization which transforms work organization as well as working activities. However, in most examples it is always a question of dispensing with or reallocating certain tasks, increasing the employees' workload, and mobilizing their potential or extending repetitive tasks (Hirsch-Kreinsen & Wolf 1996, Moniz 2007).

demands have changed with regard to the differentiation of front-office or back-office employees. There are two trends: on the one hand, the transformation from former 'front-office employees' into workers with more highly standardized and lower-skilled activities and little interaction. On the other hand, an up-valuation of front-office activities is taking place which involves technical, administrative, communication and social skills (Muchnik & Valenduc 2007). Because of the strong orientation towards service activities, economic pressure becomes relevant through the increasing demands of temporal flexibility.¹⁵

4.2 Quality of work and quality of life

Posing questions on the quality of work and quality of life in the different occupational groups implied the issues of job security and its absence, individual autonomy and control, job satisfaction, and institutional support as well as a work-life balance (Krings et al. 2007:171).

In the perception of *highly skilled occupations*, issues of quality of work and quality of life seem relatively high in all countries under review. This seems true for IT professionals and partly true for designer. For IT professionals, job security does not appear to be a major topic because of the high level of qualifications and existing job options on the market.¹⁶ In all countries, IT professionals are mostly in stable employment positions, which very much influences work routines, working time patterns and individual autonomy towards work. Although the content of work is widely changing, the quality of work rarely seems to be affected because of the intrinsic motivation felt by most IT professionals. As a consequence, the self-esteem of this group can be considered to be high in all countries; this also is reflected in the active shaping of their work-life balance. Quality of life is, therefore,

¹⁵ As described above, these groups represent a great variety of occupations which can be roughly characterized as service occupations in the private and public sectors. In order to classify these groups, some relevant criteria have been selected (Muchnik & Valenduc 2007:142): (1) the degree of interactivity in the service relationship; (2) the degree of personalization of services: some activities are strongly (and increasingly) standardized; (3) the time dimension of the service relationship from 'one-shot' to long duration relationship with the customer.

¹⁶ The occupational group 'software developer' is much more affected by worldwide competitiveness than IT professionals in R&D. Therefore, uncertainty about job security in future developments seems higher due to the synchronization of tasks and its impact on the management of tasks that has been organized around the globe in big corporations. These differences have been taken into account within the synthesis report of occupational groups.

basically arranged according to individual preferences. Therefore it was not a big surprise that bargaining processes do not play a major role neither in the working organization nor in the awareness of these occupations.

High intrinsic motivation also seems to be a key word with designers, although the quality of work differs significantly in different countries. Very often, career options go hand in hand with individual compromises. The high pressure does not allow designers to simultaneously pursue objectives of artistic creativity, job security, optimal work location, and a high level of work-life balance. Thus, work always seems to be an individual negotiation process which significantly affects private lives. Because of the high temporal overload when finishing collections, reconciling work and family needs seems to be extremely difficult in all countries. Hereby, female designers are affected basically in their work-life balance.

Particularly with regard to job satisfaction and the perception of job security, in *low-skilled occupations* global restructuring significantly influences the work and quality of life of workers in all countries. Interestingly, there seems to be a contradiction between the formal (relatively stable) working conditions and the subjective perception of insecurity on the part of the workers. Usually the economic dependence on the company is high. As a consequence, production workers in all countries perceive their quality of work as at a low level because of the high job insecurity. As an ongoing trend especially manufacturing processes still are outsourced to other locations worldwide.

In cases where the workers were involved in restructuring processes, job satisfaction was positively affected. In most case studies, however, workers were not involved in these processes. Compared to other occupations the level of unionization in manufacturing seems high (especially in Denmark and Italy). But as a trend, the power of the unions in these negotiation processes is eroding in all countries.

Increasingly flexible production patterns profoundly affect temporal constraints, which can cause enormous difficulties for combining work and life. As in the highly skilled occupations, problems of reconciling work and family needs must basically be resolved by women. Thus, career options are basically provided for men. Only in countries with specific family-based policies are these disadvantages lower for women.

The proportion of women in *skilled and semi-skilled occupations* in service activities is extremely high (Birindelli & Rustichelli 2007) and also here perception of quality of work and quality of life depends very much on the

option of combining work and child care. As regards work-life balance, in many cases institutional provisions of public services are partly or totally extended to the transfer of privatized personnel. These strategies are considered favorable by the employees up to now. Ongoing changes, however, seem still open for the nearest future and are creating feelings of insecurity at the employees' side.

Furthermore, the picture is very heterogeneous. As described above, there are three different types of restructuring (privatization, off-shoring, outsourcing) each of which, on the one hand, has a different impact on the quality of work and, on the other hand, depends very much on the bargaining processes of each occupation. For example, in one British case of outsourcing, changes in the quality of work are generally considered positive, thanks to a lot of negotiated provisions regarding job security, working time, and flexibility. In other cases of outsourcing, there is a clear differentiation of work conditions between core workers and peripheral workers. Here, peripheral workers are subject to job insecurity or precariousness, imposed flexibility and reduced autonomy. For the cluster of skilled and semi-skilled occupations, the development seems to be in between two extreme configurations. The appraisal of quality of work remains mainly positive, except for peripheral workers in outsourced call centers, but generally there is increased concern about future job security.

4.3 Country differences – common trends

As expected, institutional patterns within the different countries make a significant difference in decreasing the negative effects for workers. If institutional differences are taken into account between the countries, legal provisions and labor relations are relevant to working conditions, access to training and education, and quality of work and quality of life. With regard to comparative differences, supportive elements are significant for working conditions in all occupational groups. Not surprisingly, the impact of restructuring processes is far less dramatic in Scandinavian countries, due to the wide range of family-based policies and of workers' protection. In Central and Southern Europe, restructuring processes mostly have to be compensated by the individual workers in terms of access to training as well as in terms of reconciling work and family needs. But because of different traditions in terms of union involvement and political negotiation processes, a very differentiated picture arises here within the occupational groups.

Due to the political transformation in Eastern countries, there is usually a lack of institutions that support workers' protection which actually leads to the exclusion and/or partial exclusion of different groups from the labor market, i.e. ethnic groups, unskilled workers, or women with children. But here, particularly the highly skilled occupations have interesting job opportunities and may be considered as 'winners' from these processes.

In the face of global restructuring, access to training and skills development seems crucial, especially in lower skilled occupations (ETAG 2007). These are areas where institutional settings are generally weak across Europe, and which have to be organized individually by the workers. This aspect becomes a strong issue of gender equality. Empirical evidence shows that women still adopt the role of the caretaker in their families in all countries and therefore are mostly unable to be proactive in their occupations (Krings et al. 2007, Nierling & Krings 2008).

5 A new division of labor? Some concluding remarks

The perspective chosen determines whether these considerations appear in a new light in terms of new forms of division of labor or whether they are considered as part of the ongoing process of economic globalization.

However, considering recent developments in globalization, the impact is immense. It influences work processes both within *and* between organizations to a large extent. The key lies here in the use of information technology in machines and operations as well as in new strategic alignments in the companies. While external changes such as mergers and offshore processes strongly shape the public and political debate, 'hidden' changes at the work place can also be observed. These changes are situated *locally* and include changing demands in skill requirements, upskilling and downskilling processes within occupational profiles, and new individual arrangements pertaining to living and working conditions.

To sum up, the results show that restructuring processes in general lead towards speeding up processes and – intimately linked with this issue – to an intensification of work loads in all occupations. But how these issues affect the working conditions has to be analyzed in detail.

Basically, the results confirm both trends described above (see section 2): through the high competitiveness of the markets and the need for new

products and processes, creative workers with a high level of skills and knowledge are needed, which typically emerges in the form of new occupational identities. Here, these processes are creating new job chances and attractive job opportunities for specific occupations and highly committed workers.

At the same time, as the development of standardization progresses, the division of labor is organized around different tasks, specific skills, and knowledge. These skills are covered by workers with different degrees of qualification. Here, restructuring processes usually require new forms of standardization in workloads and proceed with further marginalization and devaluation of production and less-skilled work. In many countries these developments are creating tension with regard to social exclusion processes from the labor market.

Generally it seems that highly skilled occupations can cope more easily with the new demands that are emerging, whereas low-skilled occupations seem to be much more reliant on these processes. These occupations do not necessarily have to be outsourced abroad, but can lead to precarious and unprotected working conditions within most European countries.

These results may vary strongly in different companies and countries; however, it seems that this ‘fosters trends towards capital concentration and the consolidation of activities in particular locations and metropolitan areas’ (Flecker 2007:38). Thus, the global element becomes well-embedded at the local level and in everyone’s daily work and life.

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