



Change processes and methodologies of future perspectives on work

Annexes

António Brandão Moniz (co-ord.), Margarida Ramires Paulos (IET/FCT-UNL, Portugal) and Duco Bannink (University of Twente, The Netherlands),

(with the collaboration of Bettina Krings and Linda Nierling, ITAS-FZK, Germany, and Ringo Ossewaarde, University of Twente, The Netherlands)

works
CHANGES IN WORK

CIT3-CT-2005-006193



Copyright (2009) © Work organisation and restructuring in the knowledge society - WORKS project
Project number: CIT3-CT-2005-006193

All rights reserved. No part of the report may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording; and may not be quoted or cited, without prior permission in writing from the Project Co-ordinator.

The material in this report draws on the collective work of the WORKS consortium, funded by the European Commission under its 6th Framework Programme, and the copyright is held by the WORKS project. However the views expressed in this report are those of the named authors and do not necessarily reflect the European Commission's official view on the subject nor that of the consortium as a whole. The Community is not responsible for any use that might be made of data/information appearing therein.

Contents

1	Detailed information about summarised trends and features	5
1.1	Organisational and employment structures - B	5
1.2	Work patterns and terms of employment - C	18
1.3	Quality of life - D	29
1.4	Policy of working life - E	38
2	Analyses of case studies	49
2.1	Introduction	49
2.2	Occupational studies; synthesis report	49
2.3	Design in clothing	50
2.4	R&D in ICT	52
2.5	Production in clothing	57
2.6	Production in Food	60

1 Detailed information about summarised trends and features

1.1 Organisational and employment structures - B

1.1.1 Work organisation at company level B1

Clothing industry

- Concentration on core activities and outsource non-core activities (WP10 - p. 9).
- Complexity of governance and control of the new organisational relationships (WP10 - p. 9).
- Adele has moved from a production orientation to a marketing and retail orientation (WP10 - p. 15).
- Time is key in the business (*Green S.p.a.*), (WP10 - p. 16).
- Overall, design, planning, purchasing, quality control, distribution and sales are located in Belgium, while production is split (*Wonderwear*), (WP10 - p. 17).
- Quality, flexibility, small batch sizes and short delivery times, but also geographical proximity, are criteria for the selection of subcontractors (*Trousers Company*), (WP10 - p. 18).
- It turned from a production-centred into a marketing-centred company (*Copy Fashion*), (WP10 - p. 20).
- The German mail-order company (*Eco Clothing*) (...) after a crisis in 2001 (...) drawn an emergency plan that included the reduction of employment, a rationalisation programme based on the implementation of new technology and a cutback of the variety of products (WP10 - p. 20).
- The functions management, logistics and partly design are located at the headquarters in Germany (*Eco Clothing*), (WP10 - p. 21).
- In the 1990's it responded to the changes in the industry by offering an increased range of services to its customers and thereby attained a central position in the fashion value chain. These services are consulting, research, design, sample development, sourcing of material, production sourcing, lab testing, fitting, quality control and order tracking (*Glog*), (WP10 - p. 22).
- All companies in the sample have gone through considerable downsizing, with the exception of *Wonderwear* (WP10 - p. 23).
- Changes in work organisation depend on the position of the company in the value chain. While companies that have outsourced production and have only kept pattern making, for example, report an enlargement and enrichment of tasks, their subcontract-

tors usually organise production in assembly lines with highly-repetitive work. While at the higher end of the value chain functional flexibility is based on high skills and long tenure, at the lower end flexible allocation of workers is made possible through the simplification of work (WP10 – p. 24).

- Developments in work organisation are also influenced by general trends of business and industry processes. The most conspicuous feature here is the overall acceleration of business activities and workflows (WP10 – p. 24).
- Demand increasingly rapid responses (WP10 – p. 24).
- The balance between collective work and lonely work is an important issue in the occupational identity of designers (WP11 – p. 38).
- The increasing concern for integrated value chain management leads the designers to work more closely with other departments in their company (WP11 – p. 40).

IT industry

- *Comtel* France – The privatisation of its mother company has led to considerable reorganisation (WP10 – p. 33).
- *Comtel* France – Units that used to be organised around technologies and research themes have been reorganised along the lines of products and markets and now are distributed spatially over several sites (WP10 – p. 33).
- R&D centres have become internal subcontractors (WP10 – p. 33).
- The Austrian and Belgian cases are research institutions with a considerable proportion of public funding and close connections to universities but with the explicit mission to transfer technology, increase the proportion of third-party funding and move research closer to the market (WP10 – p. 34).
- The idea is to foster dialogue and comprehension between R&D and Marketing divisions (WP10 – p. 37).
- Actual research may be spatially distributed. Such distributions follow different logics: the *IT Research Labs* and also *UK Labs* are intentionally located close to a university or research institute centre of expertise as part of regionally specialised clusters (WP10 – p. 38).
- The control comes almost completely from the requirements of the project-based organisational structures (WP10 – p. 40).
- Work in software R&D overall is organised in projects with the exception of administrative work (WP10 – p. 41).
- Projects generally, share some informality and adhocracy (WP10 – p. 41).
- Spatial mobility in IT R&D is limited and our cases do not draw on a global labour market (WP10 – p. 42).
- Time horizons matter increasingly, R&D is speeding up (WP10 – p. 44).
- In 2003, *Business-Software* reorganised its operations according to business functions with the aim of becoming a ‘network company’. Locations that used to be dependent on older locations or the German mother for leadership and management functions are now independent and formally equal. Conceptual work and production are now separated. Projects are assigned to locations through tender procedures, and locations are encouraged to pool specific competencies (WP10 – p. 48).

- *SoftServe*, Bulgaria, consulting, webdesign and systems integration are fields that were abandoned during the restructuring process (WP10 – p. 50).
- Cost emerges as a matter of definition (WP10 – p. 51).
- Restructuring did not lead to major changes in employment conditions in the cases in IT Software development, with the exception of the Swedish case in which redundancies resulted from rationalisation and offshoring. Other effects were a greater formalisation in target setting, career development trajectories and HR practices in general.
- Work in software development generally is organised in projects and teams (WP10 – p. 57).
- In Swedish *INIT* the merger with US-based Company has played a part in reorganisation. Managers and developers find that management has become more hierarchical and top-down compared to the Scandinavian style of networked decision making. Economic, administrative and HR functions are more formalised, and time and planning horizons have been shortened to demands of capital markets with quarterly intervals of monitoring (WP10 – p. 58).
- The restructuring of software development is characterised less by linear processes or a neo-Taylorist ‘one best way’ but by interlaced loops of changes that are embedded with a company’s or network’s history, market and institutional environment (WP10 – p. 62).
- The more the R&D work is based on market-oriented demands the more the occupational identity is connected with the company’s culture (WP11 – p. 59).

Food industry

- Highly-automated (WP10 – p. 11).
- The workflow of the production function in the food industry begins with raw materials (...), the next stage transport, usually outsourced to external transportation companies in these cases. Then the agricultural products are processed into industrialised products (...). The next stage is a production process which prepares the food for packaging (...). Finally, the products are packaged and distributed through the logistics and sales divisions (WP10 – p. 69).
- Several of the agricultural organisations we looked at started as or still are co-operative movements, which are based on a democratic principle, meaning that all members, no matter the size of their farm, have equal opportunity for influencing decisions (*ND - Meat Inc.*), (WP10 – p. 67).
- Even given restructuring and modernisation, food production remains quite traditionally organised. The processing and maintenance areas are the more highly-skilled areas, often where men are employed, and the production and packaging areas are the less skilled areas where women and unskilled men are employed (WP10 – p. 70).
- In the Bulgarian brewery case *Beer AD*, the plant operates 24 hours days in 8 hour shifts, even on weekends (WP10 – p. 75).
- The role of customers has increased (WP10 – p. 76).
- At *ND* in Italy restructuring went along with experiments in teamworking and job rotation. Taking the work organisation at *Hydro* (subcontractor) into account too, we see that there exist large differences in the working conditions. Especially working time arrangements are much less-attractive for employees of the subcontractor. As it can be

seen in Bulgarian brewery restructuring of value chains is also often followed by technological modernisation (WP10 – p. 76).

Public sector and services of general interest

- The outsourcing of IT is often seen as part of a tendency of decomposition or ‘hollowing out’ the vertically integrated company. The other side of the coin is the emergence of new business service providers that form a new industry. Outsourcing to IT service providers means that the IT infrastructure, including hardware and software and related services, is provided by a specialised company external to the client company or the public administration (WP10 – p. 85).
- There are various drivers for the growth of IT service providers and the corresponding structural shift in the economy. One has to do with access to specialised knowledge (WP10 – p. 86).
- Often companies decided to outsource the IT function to a specialist IT company in order to guarantee the necessary expertise, reduce development costs and increase the speed of development (WP10 – p. 86).
- The IT service providers were able to grow rapidly because they often took over the personnel from their clients (WP10 – p. 86).
- The main motives and aims of the reorganisation are updating of the IT infrastructure, including the digitisation of records and cost reductions. While economic gains rank highly among the aims and expectations, the outsourcing decisions themselves do not seem to be based on detailed cost-benefit analyses (WP10 – p. 89).
- The main pattern of IT outsourcing is that the IT service provider company runs hardware, software and networks for the public organisation on a contractual basis (WP10 – p. 91).
- There are two separate levels of functions to be analysed in the service-provision chain. First, there is the *operational level*, e.g. of running and maintaining the IT for the client organisation, which can include purchasing and other functions. At this level, the tasks can be largely externalised and thus co-operation can be limited (...). Second, there is the level of contractual relations between the client organisation and the service provider. New and usually complex processes can be observed relating to contract negotiations, legal aspects, definition and monitoring of service levels, renegotiation of terms of reference, revision of agreements, etc. (WP10 – p. 93).
- The UK case – the IT department provides the same services to the various departments of the municipality as before. The procedures for doing so however are much more standardised (WP10 – p. 97).
- The degree of formalisation has also increased, because every activity needs to be logged in the system (UK), (WP10 – p. 97).
- The case studies on business process outsourcing showed some change in work organisation but no profound alteration – at least in the short-term (WP10 – p. 99).
- The case study evidence covers four different forms of relationship: centralisation and outsourcing of IT within the public sector; IT outsourcing to private providers; business process outsourcing to private providers; and a public-private partnership for the development of a new IT system. The case illustrates the tendency of externalisation of the

business function IT in particular to private international IT service provider companies. There are national variations however (WP10 – p. 103).

- Cost efficiency has become crucial to survival. Increasing customer-orientation and the rising need for efficiency are other important factors behind restructuring processes in public services (WP10 – p. 108).
- In Hungary and Bulgaria (...). Services such as training and psychological counselling are mostly outsourced to private providers, whereas services defined as core business have not yet been outsourced. The priority instead has been to keep these tasks inside, but rationalise and standardise them (WP10 – p. 109).
- Another group of case studies, Swedish Post, Austrian Post, Greek Post and German Railways – deregulation and privatisation play an important role in all cases (WP10 – p. 110).
- Central aspects of the restructuring observed in the various cases have been the reorganisation of the workflow, new division of labour and the establishment of new services (WP10 – p. 111).
- For *Customer* in the UK, the main reason for restructuring was the need for modernisation and improvement of efficiency. *Customer* centralised 400 different local services (WP10 – p. 112).
- Most common has been the outsourcing of customer services that can be standardised, formalised as well as technically empowered and supervised (WP10 – p. 113).
- Public administration partially made use of a form of a value chain restructuring that dramatically gained worldwide importance back in the 1990's: the outsourcing of telephone services to call centres as a first possibility of outsourcing. Most of these cases have in common that there was no relocation of an existing department, e.g. of a separate call centre unit, but they entrusted call centre services to external companies right from the outset (WP10 – p. 113).
- In many cases internal rationalisation measures can be found. These include modernisation of physical working conditions and improving the IT infrastructure, making work more effective and more productive (WP10 – p. 115).
- The cases analysed for this report show that restructuring has partly been followed by an increase in employment and partly by staff reductions (WP10 – p. 116).
- NEA was finalising the reduction of the number of employees – more than 300 people. Apart from the cuts in administrative positions, there was a downgrading of certain positions, especially at middle management level, to lower positions. In the case of the German Railways, the setting up of subsidiaries was also followed by a reduction of personnel (WP10 – p. 116).
- There are also cases in which restructuring was not followed by staff reductions, for example at PCC in Sweden generally been a small increase in overall staff numbers (WP10 – p. 117).
- The dominant trends in restructuring that can be shown in most of the case studies, have been standardisation and intensification of work regimes (WP10 – p. 121).
- The forms of restructuring of value chains are various. They include full outsourcing of customer service, public-private partnerships, the founding of subsidiaries for services, which are still part of the parent companies, internal restructuring and centralisation (WP10 – p. 130).

1.1.2. Flexibility B2

Clothing industry

- Fluctuations in demand are answered by a storage system that acts as a buffer. But there is also a need for temporal flexibility in the form of overtime. These demands on flexibility were passed on to the subsidiary and the subcontractors so that Saturday work could be reduced in the Greek plant (*Co B.*), (WP10 – p. 19).
- Enhanced internal temporal and functional flexibility (*Copy fashion*), (WP10 – p. 20).
- The customers demand faster services and high levels of flexibility that have been reached by teamworking in the warehouses (*Glog*), (WP10 – p. 21).
- Working hours are highly-flexible because *NewWear* not only has to react very flexibly but also has to catch up delays that occurred at *Green S.p.a.* (WP10 – p. 24).
- It is necessary to respond to customer demands and requests within 24 hours which for employees often means overtime and also nightwork at home (*Glog*), (WP10 – p. 22).
- *Geisha* (Dutch) respond with a restructuring plan which included increasing flexibility (WP10 – p. 22).
- The company uses temporal flexibility with longish workweeks of nine hours per day and work on Saturday (with less employees, suspended fifteen days a year each, receiving support from the state), (*Green S.p.a.*), (WP10 – p. 24).
- The demand for increasingly rapid responses (...) often results in a speeding-up of work processes, in longer working hours, in high demands on temporal flexibility and in increased stress (WP10 – p. 24).
- High levels of temporal flexibility are required: customers can expect answers within 24 hours. This means that some employees work from home in the evenings (WP10 – p. 25).
- Changes of employer (or of principal contractor for freelance designers) or changes of positions are considered quite normal. They can be explained by three categories of factors: individual creativity, career progression, consequences of restructuring (WP11 – p. 35).
- Companies tend to use more flexible design work force, preferring freelance contracts to employment contracts (WP11 – p. 37).
- In the Portuguese case, due to the restructuring of the company, flexible production pattern were introduced which caused a new (flexible) organisation tasks as well as working time (...). Workers feel that their working conditions worsened (WP11 – p. 111).

IT industry

- Flexible working arrangements are becoming more common in terms of which hours are worked and working from home, a requirement linked to communication with the offshored sites and the US headquarters (*INIT*), (WP10 – p. 56).
- Through restructuring and internal reorganisation the demand for flexibility and mobility for the individuals is increasing (WP11 – p. 69).

Food industry

- The demands for flexible employment are very high. One type of flexibility, found for example, in *Meat Inc.* in Denmark, revolves around the concept of a societal social contract. The company has the possibility to act very flexibly, because the term of dismissal notice is very short in Denmark (WP10 – p. 71).
- The company used more precarious forms of flexibility by relocating parts of the deboning activities to Germany, where foreign workers (*e.g.* from Poland) are employed in short-term contracts, working longer hours for lower salary, resulting in much lower production costs (*Meat Inc.*), (WP10 – p. 71).
- *Meat Inc.* is very interesting. Since the centralisation of production and the outsourcing of parts of the deboning activities, workers in the remaining deboning department have to decide whether they want to work in a ‘fast’ group, working the maximum piece rate, or whether they would rather work in a slower group where the pace is more modest, with correspondingly lower pay (WP10 – p. 72).
- Functional flexibility is used widely at the Italian plant *ND*. Workers carry out more than one task and are even switched from one plant to another or from production to warehouses if the need arises (WP10 – p. 74).
- Some functional flexibility exists, especially to relieve physical strain. Teamworking is also evident (WP10 – p. 76).
- The types of agreements that were made to increase flexibility in working time arrangements often centred around a compromise on the workers’ side to work overtime in peak periods and to take the time off in slacker periods (WP10 – p. 81).
- Some of the flexibilisation demanded due to time pressures and cost pressures of being part of highly-concentrated and co-ordinated global food chains results in the use of outsourcing and subcontracting of poor working conditions outside of the main production or logistics company. Thus even in the highly-regulated Scandinavian cases, there was a tendency to outsource bad jobs working conditions outside the firm and outside the country (WP10 – p. 82).
- In the Italian case temporal flexibility with long working hours during peak periods including work at the weekends and extra hours is also prevalent (WP11 – p. 111).

Public sector and services of general interest

- In 2001, *German Railways*, set up a temporary agency within the concern with main function of making the utilisation of the staff more flexible (WP10 – p. 116).
- Increasing flexibility, which is one of the most important aims of restructuring, is mostly very one-sided and that employees rarely gain any advantage from it of it (WP10 – p. 120).
- In the interest of a flexible use of manpower, frontline workers are expected be interchangeable; all the employees working at the front should serve in a similar way and should be able to fulfil all the required tasks. This strives for functional flexibility can be seen in all case studies (WP10 – p. 123).
- But there have also been changes. The newly established jobs in call centres outside the public sector and its labour regulations show quite similar employment conditions to those in the private sector. Seemingly minor changes in working time regulations are

spreading: working one hour longer without being paid for it (*German Railways*), working at the weekends (*UK Customers*), and overtime work as a rule (*Greek Post*), (WP10 – p. 124).

- Finally flexibility in terms of mobility under specific conditions is of major importance for the frontline workers (WP10 – p. 124).

1.1.3 Internal labour market B3

Clothing industry

- Several firms combine productions in Asia, Eastern Europe and North Africa, for different product segments (...). Anyway, whatever are the locational choices made by the firms, the speeding-up process and the increasing time pressure are common current trends (WP11 – p. 43).
- The occupation of dress designer is mainly feminine (WP11 – p. 45).
- Production work is in both industries (food and clothing industry) still an important task; nevertheless, the general trend of the decline blue-collar work in European employment affected both sectors. Most of the analysed cases show firms with attempts to outsource production or parts of the production. This causes often the feeling of insecure employment conditions by the affected production workers (WP11 – p. 99).
- The clothing sector faced fundamental structural changes in the 1990's. The significant decline of the employment rate in the clothing sector in all European countries, apart from Portugal, is evidence of these changes. The decrease affected mainly production workers, whose share was considerably reduced. In contrast, other business functions of the sector like logistics or design show smaller reductions or even a rise in employment rates. However the percentage of production workers within the sector remains very high, especially in Portugal and the New Member States (WP11 – p. 100).
- In the clothing sector industrial production has already a very long tradition (...). The manufacturing of clothing is very labour-intensive. The products vary permanently. As a consequence, clothing manufacture has a low level of automation. Rationalisation strategies were realised by relocating clothing manufacture to subsidiaries in low-wage countries because of low investment costs as well as low demands on qualification. This lead to rapid global-wide changes in the location of clothing manufactures providing in insecure and bad working conditions for the concerned production workers (WP11 – p. 101).
- In the clothing sector the demands on education are higher. All production workers of the Belgian case have a formal vocational training in dressmaking (...). In contrast the Portuguese workers gained their qualification only through a long work experience in the sector (WP11 – p. 104).
- The business function production is especially prone to offshoring or outsourcing strategies (and food industry), (WP11 – p. 104).
- (and food industry) The former collective of the workers is affected by an increasing heterogeneity of the occupational group 'production workers'. This heterogeneity includes a broader range of workers from different countries, a differentiation of working tasks, flexible working groups. This destructs former feelings of a homogenous worker's collective (WP11 – p. 109).

- In general the division of tasks in the occupational group 'production workers' is characterised by a strong gender bias (and food), (WP11 – p. 114).
- The 'male breadwinner model' still functions as the normative model for the organisation of work on part of the companies as well as for the division of labour between both sexes (and food), (WP11 – p. 116).
- The business function 'production' is located at the very low end of the global value chains and seems to be most likely to be outsourced and offshored. Working places in production are therefore characterised by a high level of insecurity in employment (and food), (WP11 – p. 116).

IT industry

- The employment effects for R&D have been mainly positive – the small companies have remained either stable in size or are increasing in size (WP10 – p. 39).
- Due to the geographic relocation of functions, the R&D workers had to accept new working conditions on the level of geographic mobility as well as on new functional tasks (WP11 – p. 56).
- Through the restructuring of global value chains, the internationalisation of markets as well as the economic pressure on the markets has increased (WP11 – p. 56).
- Requirements of mobility are perceived as a threat for career development and beyond, for the own identity at work (WP11 – p. 64).
- R&D work as traditionally technology-based work has been a male dominant occupational group in many countries (WP11 – p. 67).
- Because of the shift from research towards market orientation as well as towards global organisations, more and more women are working in the field of transdisciplinary skills and competences (WP11 – p. 68).
- Basically there is no inequality between the sexes in terms of entry, formal qualifications and career trajectories of the occupation (WP11 – p. 71).
- In all the cases, the guarantee of job security is weakened by restructuring. 'It is not anymore a job for life' (WP11 – p. 82).
- All reports concerning mergers underline a reinforcement of formalisation in merger companies, in comparison with more informal career management in smaller business units (WP11 – p. 84).
- To general trends in the evolution of the software business: standardisation, internationalisation and customer-orientation (WP11 – p. 90).
- As already mentioned, the world of software development is mainly male-dominated, not only from a quantitative point of view, but also as regards values and professional culture (WP11 – p. 94).
- According to several case study reports, there is an implicit or explicit gender segregation of roles: women are supposed to be more skilled for functional analysis than for programming, more likely to enter customer-relationships functions, but less available for exclusive involvement in their work. Men are better at human-machine interfaces, and women better at human-human interfaces (WP11 – p. 95).
- The IT sector is a predominantly white-collar sector: 95.7 *per cent* of all employed in the sector are white-collar workers. The core activities of the IT sector *i.e.* software development and R&D activities are clearly dominated by male employers (WP11 – p. 52).

- All R&D units investigated are faced with tighter planning horizons, a general speed-up of work and the problem of defending breathing space, space to explore research with uncertain outcomes and the value of longer-term projects (WP10 – p. 40).

Food industry

- The food industry has undergone a relatively stable development without major changes in recent years (...). The percentage of production workers in the food industry lays around 45 *per cent* in all European countries. However there is a statistical evidence for ongoing automation in the industry with an increasing number of skilled factory workers (WP11 – p. 100).
- Production in the food industry has taken an industrial and technological approach due to risen consumers' demands in Europe over the past fifty years. The consumers expect ever-cheaper food as well as an increasing variety all year round (...). The occupational group 'production workers' in the food sector is relatively young (WP11 – p. 101).
- In all case studies of the food industry, the formal education level of the production workers is low (WP11 – p. 103).
- The office employees in Belgium and Bulgaria do not show a unique form of formal qualification for the position in the logistic department (WP11 – p. 123).
- In contrast, the career trajectories of logistics managers already show in contrast higher qualification requirements as well as specialisation (WP11 – p. 124).
- The logistic sector seems to be strongly male-dominated in terms of number of workers (WP11 – p. 132).

Public sector and services of general interest

- The training background reflects the rather modest and often heterogeneous qualification level (WP11 – p. 143).
- The mobility on the labour market is contrasted among countries, but is generally low among administration employees (WP11 – p. 143).
- Except for the Italian call centre workers, who have a higher educational background, this occupational group is characterised by a rather modest qualification level and often very heterogeneous background (WP11 – p. 144).
- While employees at city administration regularly work between 8:00 and 3:30 p.m. and until 6 p.m. once a week, call centres offer around-the-clock service, which is only affordable because of cheap call centre agents (WP11 - p. 151).
- The main changes through restructuring processes concern: more flexible, but often more constraining, working time management; systematic staff reduction leading to increased workload; weaker job security and fragmentation of workers' status according to their place in the value chain, either in the core organisations or in the outsourced functions (WP11 – p. 152).
- Restructuring processes – privatisation of former public services, leading to their division in several enterprises; organisational restructuring of public administrations focusing on customer-oriented service points; outsourcing of customer-relationships to call centre (WP11 – p. 157).

- Most employment in the public sector is characterised by high job security, which means open ended tenure, and – in some cases – comparably high wages (WP10 – p. 117).

1.1.4 Bargain B4

Clothing industry

- Workers generally have been with the companies for a long time and few have been newly recruited (WP10 – p. 23).
- Mostly, employment in the observed cases is characterised by long-term standard employment relationships with full-time employment (WP10 – p. 23).
- There is more non-standard work in the retail subsidiary (WP10 – p. 23).
- In the companies investigated there is little atypical employment. Shift work is common but not used everywhere, part-time work tends to be an exception but occasionally is made to fit with shift work (WP10 – p. 23).
- Freelance contracts are increasing in the clothing sector, but they are often experienced as nearly fixed contracts; sometimes, there is a long-term commitment of the principal contractor (WP11 – p. 35).

IT industry

- UK *Lab* is one of three R&D units of *Japtech*. Have sixteen employees few of whom have fixed-term contracts, and additional short-term contractors who take over language-specific work (WP10 – p. 34).
- There appears to be little change in formal employment conditions regardless of the type of restructuring. Most of the employees have permanent full-time contracts. Freelance and part-time are not encouraged (WP10 – p. 39).
- Most of the employees also seem to have a long-term perspective in their job and in their company (WP10 – p. 39).
- Working time also appears quite stable with regular working weeks of 38-40 hours. Although the actual working week might vary due to project contingencies (WP10 – p. 39).
- There are some potentially precarious' work situations in this business function: for instance, for the satellite research sites of the French company, the older workers in the German case, and the unsuccessful Labs in the Austrian case. (WP10 – p. 45).
- In all of the cases, employment was regulated in full-time, permanent contracts and with benefits, working hours, and vacation time, *etc.* in alignment with national standards or better than national standards (WP10 – p. 55).
- In Germany in *Business-Software* employees have regular work contracts based on 40 hours weeks, and have yearly performance target agreements with their individual manager (WP10 – p. 55)
- Most of employees have a permanent employment contract (Hungary), (WP10 – p. 56).
- The standard employment relationship is the norm as well as full-time work (*Messenger Austria*), (WP10 – p. 56).

- All employees have permanent contracts with a weekly working time of forty hours (*INIT*), (WP10 – p. 56).
- The changes in non-standard employment (temporary or self-employment) were not that important: between 1996 and 2004 (EU-15), the share of temporary employment in total sectoral employment increased from 7.9 *per cent* to 8.4 *per cent*; the share of self-employment, from 15.7 to 16.5 *per cent*. Part-time employment is very low (6 *per cent*), (WP11 – p. 74).

Food industry

- The food industry is characterised by changing workloads and companies often try to solve this problem with temporary work force during peak periods (WP10 – p. 71).
- *Meat Inc.*: the framework of extremely regulated working conditions. Hours were extended for capital utilisation, but the national agreement stipulates a 37-hour work week. Thus the extra time is compensated for in three weeks and three days of time off a year beyond the regular five weeks of annual holiday (WP10 – p. 73).
- At *ND* there is a 39 hour, five-day work week and at *Hydro* 40 hours (WP10 – p. 74).
- Most of the workers work full-time. The fish farm workers have regular eight-hour days from 8 a.m.-4 p.m. (...). The workers in fillet production rotate between two six-hour shifts and have delivery deadlines everyday (WP10 – p. 75).
- There are a variety of innovative working time arrangements that were created because of the seasonal fluctuation characteristic of this sector (WP10 – p. 76).

Public sector and services of general interest

- The contractual arrangements not only reflect the forms of co-operation, they also shape dependency and power relations between the client and the service provider. In the case of outsourcing to private IT service providers, contracts are usually long-term (*e.g.* ten years) and contain detailed service level agreements (WP10 – p. 89).
- In Belgian case, we could call this relationship ‘reverse captive’ because the client company has made itself fully dependent on the supplier company (WP10 – p. 90).
- Other cases showed contractual arrangements that are intended to limit dependency (WP10 – p. 90).
- At the private service provider, half of the employees have permanent contracts, while the other half are non-standard contracts as these workers have been hired as temps from small firms (WP10 – p. 95).
- Public sector jobs are more often full-time, compared to work for subcontractors, which is often part-time and precarious employment (WP10 – p. 117).
- In the public administration cases there is a somewhat surprising stability of working hours (WP10 – p. 123).

1.1.5 Benefit system B5

Clothing industry

- The downsizing mostly has taken place with few actual redundancies. Attrition has been used, and in France, Italy, Greece and the Netherlands, early retirement packages have been offered that compensate for losses in pensions (WP10 – p. 23).
- The occupation, career and wages of fashion designer are not regulated by any collective agreement. The use of ‘fixed freelancers’ is also a way of bypassing social regulations, but as freelancers are not complaining, there is no conflict and therefore no jurisprudence (WP11 – p. 37).

IT industry

- The workers employed in this IT companies receive relatively high pay levels (WP10 – p. 39).
- R&D workers also are involved in employment contracts whereas the professional status and the professional careers are based very much on individual performance (annual evaluations), (WP11 – p. 58).

Food industry

- Absenteeism is apparently a large problem in the Bulgarian site. The company has introduced a ‘presence bonus’ to provide incentives to come regularly to work (WP10 – p. 75).

1.1.6 Company knowledge requirements B6

Clothing industry

- As already mentioned about the entrepreneurial career profile, even the designers who want to set up their own atelier or their own brand recognise the benefits of having built their professional experience within organisations, and to have learnt to deal with organisational opportunities and constraints (WP11 – p. 39).

IT industry

- At the Swedish company, the demands on the knowledge are high, especially in terms of technical knowledge and also co-operation skills (WP10 – p. 60).
- The need for research and development of IT knowledge still remain a strategic objective of the companies (WP11 – p. 56).
- The dynamic tendency of knowledge-based work and the combination of external and internal flexibility modes have led to different perceptions of skill requirements (...) as organisations also ‘can be urged’ to form partnerships and alliances to get access to knowledge and skills, this can provide new learning opportunities (WP11 – p. 62).

- With regard to the technological development and new market there is widely spread acceptance of the necessity of continuous learning both on the side of the organisational management and on the side of the R&D workers (WP11 – p. 63).

1.2 Work patterns and terms of employment – C

1.2.1 Work content C1

Clothing industry

- In design, the re-actualisation system leads to a multiplication of tasks (WP10 - p. 25).
- Intensification of work and higher demands on flexibility are not limited to the design function. Remaining production personnel often finds an enrichment or change of tasks (WP10 – p. 26).
- Work as a strong individual meaning for fashion designers, highly-identified with the creative work they develop (WP11 – p. 38).
- Their work becomes increasingly sensitive to cost-oriented constraints feedback from consumers preferences (WP11 – p. 39).
- The main concerns of dress designers for their future are, on the one hand, the increasing workload due to the priority given by the companies to cost reduction all along the value chain and continuous feedback from the market (WP11 – p. 48).

IT industry

- The move closer to markets and customers has two implications: functions such as marketing and sales or, more generally, project acquisition have both been added to the tasks of researchers and new jobs have been created for specialists in these areas (WP10 – p. 36).
- The new organisation instead introduces a matrix relationship through corporate marketing. The idea is to reduce the time necessary to go through the steps of the value chain between research, innovation and commercialisation (WP10 – p. 36).
- This implies that researchers experience the shift towards product development as increased time compression as well (WP10 – p. 37).
- Commercialisation had an impact on the skill needs and composition of the work force. For instance, most companies and Labs hired some kind of sales or marketing specialist to facilitate a stronger product orientation.
- Teams are now responsible for customers rather than projects in order to foster long-term collaboration and knowledge-building (*SoftServ*, Bulgaria), (WP10 – p. 50).
- In Hungarian's *DomainSoft* who have been moving up the value chain within the mother company, new managerial and architectural tasks have been added to project management (WP10 – p. 58).
- In Bulgaria's *SoftServ*, restructuring has taken the opposite direction to the German case: responsibilities have been devolved to the lowest possible management level and open, informal communication between levels is encouraged.

- The increase of speeding-up processes also is strongly connected with the market-oriented demands and has special relevance for the working culture of this occupational group (WP11 – p. 57).
- The high identification with the content of work (WP11 – p. 71).
- The job content (technical or relational interest, motivation, learning, continuous evolution) is an important factor in their career decisions (WP11 – p. 82).
- The relation to technology itself is changing. The ‘complex problem-solving’ orientation becomes more important than the fascination for technological pioneering (WP11 – p. 85).

Food industry

- The work is often very monotonous and repetitive (WP10 – p. 73).
- In the Greek case the work content is quite simple and repetitive (WP10 – p. 74).
- There has been a shift from a physically demanding ‘entrepreneurial’ occupation, to a more science-based one (FC), (WP10 – p. 78).
- Workers at the level of production or the warehouse experienced the effects of restructuring very indirectly. Most reported that their job content did not change significantly (WP10 – p. 82).
- For the regular workers remaining in the core companies, restructuring has not resulted in broader, more challenging jobs. The general outcome has been increased standardisation and some flexibility in time use, while sustaining existing wage and overall working time levels (WP10 – p. 82).

Public sector and services of general interest

- Two staff interviewed for this case (UK) has become more ICT system administrators rather than creative software designers and they feel frustrated having to work in this more structured way (WP10 – p. 97).
- Swedish case – the implementation of a new IT system, which is still being developed, is expected to lead to higher degrees of specialisation (WP10 – p. 99).
- Other case studies revealed an increase in knowledge-intensity. This mainly relates to public administration workers, such as the German police officers, who were not involved in IT projects before and now have to co-operate with the private IT company (WP10 – p. 100).
- When call centres started working for *Citylife* (Austria), their task was more or less to forward customers concerns to service employees in the decentralised service centres (...). Over the years their responsibilities have increased and more and more requests are arranged directly at the call centre or in co-operation with technical companies (WP10 – p. 111).

1.2.2 Business function, occupation profile C2

Clothing industry

- The educational background of dress designers consists of higher education degrees, either at universities or in specialised public or private high schools (WP11 – p. 34).
- Technical designers come from specific technical training schemes in high schools. So, it is a high-qualified and specialised occupational group (WP11 – p. 34).
- One of the reasons for frequent changes would be related to the artistic side of the profession (WP11 – p. 35).
- Respondents describe a strong inclination to creative and artistic aspects of the designer occupation, not only in fashion design but also in technical design (WP11 – p. 38).
- The main problems mentioned in the occupational case studies are the increasing time pressure, entailing a growing workload, and the balance between autonomy and control (WP11 – p. 42).
- In both sector (food and clothing) the workers do not expect significant advances regarding their career development; mostly they stay in the position in which they were hired (WP11 – p. 104).
- Portuguese case working tasks are organised according to the principle of flexible production. While older workers still stress the need of experience and specialisation to fulfil certain tasks, younger workers emphasis the need to have flexibility in working tasks (WP11 – p. 109).
- In the Belgian case study the content of work is more varied, demands more responsibility and allows new forms of recognition (WP11 – p. 109).

IT industry

- Add new functions such as marketing and customer contact (WP10 – p. 32).
- *CharleTic* Belgium – since 2005 it has pursued an increasingly commercial orientation (WP10 – p. 35).
- If we assume a continuum of IT and software research between ‘basic’ research and development of marketable products, all investigated R&D units have moved or been pushed towards the product development side (WP10 – p. 36).
- The companies tend to have few different categories of workers (WP10 – p. 39).
- A major effect of the upgrading of Eastern European subsidiaries on employment conditions was a standardisation and formalisation of the job classification system (WP10 – p. 55).
- German *Business-Software’s* reorganisation is the most co-ordinated and far-reaching effort. It is characterised by increased specialisation, compartmentalisation, a loss of task diversity, and more documentation and code review work (WP10 – p. 57).
- Loss of autonomy as well as the change from technical to managerial skills seems also to be important driving factors for a change in occupational identity in the other countries (WP11 – p. 60).
- Through the orientation on customer needs, the demand for technical application increasingly dominates the occupation of R&D workers (WP11 – p. 60).

- The occupation still is received as creative and interesting work environment with a high level of quality of work (WP11 – p. 65).
- Particularly changes of organisational working structures have also led to different working profile, which is appreciated by younger R&D workers. New working profiles, a changing orientation of the software and the necessity to sell the software successfully on the markets have influenced the occupational profile as well as the work contents (WP11 – p. 67).
- A shift from research to market which is more or less developed within the sample (WP11 – p. 70).
- Through the shift towards market demands the profile of R&D workers has been diversified. Technical skills still are the precondition for this profession but managerial as well as communication skills have gained importance (WP11 – p. 70).
- In most of the cases, a university or high school degree is nowadays a prerequisite for entering a career as IT professional in software services (...), there is a wide variety of higher education diplomas (WP11 – p. 79).
- In several cases, the path from university to employment is very direct (WP11 – p. 80).
- As the career proceeds, more ‘soft skills’ (communication, team management, financial management, foreign languages, *etc.*) must be added to IT skills, which have nevertheless to be continuously updated (WP11 – p. 80).
- Another version of the organisational career, named here ‘technical’, is encountered in the Bulgarian, Hungarian, Swedish and Dutch case studies. Career progression does not lead step by step to an inversion of the mix of technical and managerial tasks, but it leads into more complex and challenging technical tasks (WP11 – p. 81).
- In the UK cases, despite a huge restructuring relying on outsourcing and transfer of personnel, the interviewees mobilise all their resources to continue in the private company the organisational career that they started in public administration: they negotiate transfers of benefits, they identify themselves with the client rather than with the company (WP11 – p. 81).
- The challenge of skills development plays an important part in career choices or career progression (WP11 – p. 82).
- The quality of human relationships at work is highly-valued among the interviewees (WP11 – p. 86).
- Informal recognition is considered as very important (WP11 – p. 86).
- An evolution of skills requirements towards a mix of IT skills and non-IT skills: technological and methodological skills, project management skills, customer-oriented communication skills, social interactive skills (WP11 – p. 88).

Food industry

- Despite the low cost of labour, the industry has been investing for some time in automation in production, process and logistic functions, increasing capital utilisation and changing skill demands (WP10 – p. 65).
- Bulgarian case *Beer AD* – Since the privatisation, there is a green light for young, ambitious and trained specialists. For them, possibilities to make career have generally increased. On the other side there are still employees for whom the patronage and the personal networking are still strong within the company (WP10 – p. 72).

- The work organisation in food production remains quite traditional and low-skilled (WP10 – p. 73).
- The Danish case is characterised by a traditional low-skill sector in which work is Taylorised and standardised. The work is repetitive and monotonous (WP10 – p. 73).
- There remains a traditional division of labour in food production, and jobs tasks are still highly-gendered. (WP10 – p. 75).
- The content of work itself in the food industry has remained quite stable over the years: a traditional division of labour between processing and packing, gendered and ethnic divisions of labour between these two departments, increasing use of technological innovations which replaces manual labour and puts high levels of capital utilisation in the foreground (WP10 – p. 82).
- The concentration and vertical integration of companies as well as the concentration and expansion of their end customers led to an increase in demand for product diversity in all the food cases examined here. This made the work of the logistics departments more complex (WP10 – p. 83).
- The work biography of the workers in the food industry can often be characterised as fragmentary. Often the workers had several different jobs before the actual one (WP11 – p. 103).
- Production workers do not receive a feeling of collective identity from the content of work; rather other factors are relevant to build up a commitment to work. All case studies show that social relations between colleagues are very important to build up collective feelings (and clothing industry), (WP11 – p. 106).
- Effects of restructuring in the logistics' sector – the increase of knowledge-based activities, the hierarchical and vertical differentiation, male-working culture (WP11 – p. 136).

Public sector and services of general interest

- This industry is highly-concentrated: in Germany, the four biggest IT service providers between them cover 80 *per cent* of the market (WP10 – p. 86).
- Boundaries between IT service provision, business process outsourcing (BPO) and business consultancy become increasingly blurred (WP10 – p. 87).
- The Norwegian health authority - the use of services provided by large private companies specialising in complex and specific health care technologies is seen as a strategic investment from the public sector, because it allows access to innovation in a short period of time. Overall, rather than resulting from strict cost calculations, the outsourcing decisions seem to be based on political considerations or to follow general trends in the country (WP10 – p. 89).
- The case studies showed that crucial knowledge tends to move from the public organisation to the service provider, limiting the capacities of the former to control the service provision and to keep open alternative options (WP10 – p. 90).
- Many of the case studies revealed that new functions and work roles had to be created for liaison and co-ordination tasks (WP10 – p. 91).
- In three of the cases, workers were transferred to a new employer in the process of outsourcing. While these cases show big differences in the negotiation processes and courses of action, the outcome is quite similar (WP10 – p. 94).

- The UK case: while initially the majority of the transferred workers opted to keep their terms and conditions, during the first year some changed to the service provider's terms and conditions, which means shorter holidays, a one-hour longer working week, no flexitime but higher salaries. Another difference is seen in the weaker equal opportunities and diversity policy of the new employer. As a consequence of the outsourcing and transfer, perceived insecurity has increased (WP10 – p. 94).
- In the Swedish case, after the outsourcing and the transfer to the new employer, perceived insecurity decreased (...). The terms and conditions of employment stayed roughly the same, while in practice more flexibility is demanded from the employees and the workload became heavier (WP10 – p. 94).
- The Norwegian case – found an expansion of employment and an improvement of employment conditions (WP10 – p. 94).
- Also in the Dutch case there were qualitative employment changes caused by the outsourcing process, because the work roles of municipal workers changed: because of the implementation of the new IT, less juridical knowledge is needed to do the work (WP10 – p. 95).
- Centralisation made it possible to develop more specialised work roles (WP10 – p. 98).
- At the level of inter-organisational relations new functions and tasks were created (WP10 – p. 99).
- Value chain restructuring does have considerable impacts on employment, although direct job loss as a consequence of outsourcing seems to be rare (WP10 – p. 103).
- Firstly, the customers may be regarded as part of the value chain, because they are able to add value to the service or even become sources of innovation. Secondly, the characteristics of service goods such as intangibility, perishability and simultaneous production and consumption preclude specific options of restructuring (such as separating time and space of production and consumption of goods) as well as opening options (such as communicating intangible information services via the internet), (WP10 – p. 106).
- The concept of customer care has evolved over the past years in a way that it now involves both private companies and public sector administrations (WP10 – p. 106).
- Looking at the relocation of functions (...). Telephone services are centralised in a call centre, functions in call centres are highly-standardised and the work force is confronted with a comparably narrow range of tasks. A second and different form of relocation of functions is the outsourcing of a wider range of services carried out in a face to face customer contact (WP10 – p. 114).
- A third form of relocation of functions is 'outsourcing' to customers: customers become part of the value chain and service companies are increasingly trying to make use of the potential of customer integration (WP10 – p. 114).
- Looking at the citizen or the service receiver as customers, service quality has become a value in its own right and in this way has changed the value chain. Customer service functions, which were previously not fulfilled or only implicitly fulfilled, have now become explicit tasks (WP10 – p. 114).
- For 'core' employees, changes are mainly perceived as limitations, rarely as opportunities (...). For 'peripheral' employees, there is no organised career path. Career trajectories are characterised by mobility and flexibility (WP11 – p. 145).

- For interviewees in public organisations or in privatised public organisations, the main reference in the occupational identity is the (former) institution. Organisational identity is stronger than occupational identity (WP11 – p. 147).
- An increasing formalisation of customer service function (WP11 – p. 147).
- The weak integration of peripheral workers (WP11 – p. 148).
- Weak co-operation, integration with the group, or identification with the city/public administration is related to the form of contracts: temporary contracts, short-term contracts or freelancers (WP11 – p. 148).
- Employees of this occupational group have very different types of formal qualifications, but ‘informal’ social competence and stress resistance are often important prerequisites (WP11 – p. 149).

1.2.3 ICT C3

Clothing industry

- *Green S.p.a.* as strongly invested in information and communication technology as a base for further outsourcing of various functions (WP10 – p. 16).
- A common feature of the cases is the tendency of acceleration of business processes and the significance of ICT (WP10 – p. 17).
- Both the outsourcing and the internationalisation of production and the strengthening of logistics rely on information and communication technology (*Menswearco*), (WP10 – p. 17).
- The logistics (...) strongly relies on information and communication technology (*Trousers Company*), (WP10 – p. 19).
- Work in the warehouses is still mainly manual work although the implementation of ICT already had its impacts (*Glog*), (WP10 – p. 21).
- New technology was introduced in a participative process and restricted to improvements in workflow and documentation which render work more effective and less exhausting for logistics workers (WP10 – p. 26).
- The increasing use of ICT also influences the occupational identity of designers (WP11 – p. 40).
- The risk of growing standardisation of both models and design methods, driven by market reorientations and supported by software tools (main concerns of dress designers for their future), (WP11 – p. 48).
- In Greece, Italy and Portugal only managers or foremen have access to or use IT (and food industry), (WP11 – p. 110).
- It seems that daily work routines of the majority of production workers have not changed much due to the introduction of new techniques and machinery. Only few workers, often those already have a higher position, were challenged by new tasks and enjoyed corresponding training opportunities (and food), (WP11 – p. 110).

IT industry

- Due to the introduction of information and communication systems into production and distribution processes, the creating of an enabling infrastructure, involving the

processing of information, the need for software development as well as further technical systems has arisen significantly (WP11 – p. 53).

Food industry

- The workflow has been affected by an increasing automation in most of the cases (WP10 – p. 70).
- In Denmark there is an increasing Taylorisation of work processes. In the Italian case ND, technology is also used to increase surveillance and control of machine processes, making the quality and productivity levels of individual workers very transparent (WP10 – p. 70).
- In the Italian case, there has been an improvement in work content in ND as a result of automation and technological innovations which has reduced the amount of repetitive manual labour. ND has also initiated an experiment in teamworking and job rotation in the production department (WP10 – p. 74).
- There has been a decrease in manual functions due to a technological modernisation that occurred following privatisation (WP10 – p. 75).
- The implantation of ICT and new machinery causes a decrease in manual functions and changes skill requirements of workers. In general it can be said that there exists some functional flexibility, which is also support by ICT (WP10 – p. 77).
- Information technology plays a role since there has been a shift from ‘a stock-based logic to a flow-based logic’, which aims to ensure the availability of the right kind of product, in the right quantity, in the right place at the time it is required (WP1 – p. 81).

Public sector and services of general interest

- In many organisations there is an increasing trend towards self service. This way of involving the customer in the value chain and the process of service production is heavily dependent on information technology (WP10 – p. 111).
- A crucial role in the restructuring of the value chain in all of its forms is played by new information and communication technologies (...). Most reorganisation cannot be implemented without far-reaching changes in technical infrastructure. For example restructuring at the DVLA, Citylife, PCC and Dutch Telecom depends on the introduction of call centre technology (...). But rationalisation and standardisation as it has taken place at Intermed and NEA would not have been possible without information technology (WP10 – p. 115).
- Is the great importance of ICT, which not only helps to standardise processes and to monitor them, but also constitutes common knowledge that frontline workers can use in their transactions with the customers. Therefore there is not only deskilling but also the facilitating of work (WP10 – p. 124).
- The use of ICT tools strongly fosters codification of knowledge and displaces the skills requirements from ‘content-related’ skills to communication skills and other ‘soft’ skills (Tacit skills), (WP10 – p. 125).
- The increasing use of ICT tools has several implications. The main one is a standardisation of tasks and knowledge (WP11 – p. 149).

- Standardisation of knowledge is also related to the increasing use of eLearning methods (WP11 – p. 149).
- In some cases, the introduction of new technologies led the enterprises to take responsibilities in training and getting the useful ICT support for employees (WP11 – p. 149).
- Increasing use of eLearning also makes the employee increasingly responsible for his own competence development. The enterprise can then save money on learning (WP11 – p. 150).
- Staff reduction is sometimes related to the use of new technology (WP11 – p. 150).
- An increasing use of ICT tools leads to standardisation of tasks and knowledge, having sometimes incidence on job satisfaction (WP11 – p. 157).

1.2.4 Skill policies C4

Clothing industry

- Overall, with the offshoring and relocation of the more standardised and repetitive functions there is rarely any deskilling to be observed in our cases. Instead, the remaining production workers' skills have been upgraded and expanded (WP10 – p. 26).
- In addition, the fragmented value chains require new generic skills across the board: communication with customers, including English (...) language skills, at least basic IT skills in a working environment that increasingly makes use of integrated ERP (enterprise resource planning) systems across departments and (...) management skills (WP10 – p. 26).
- According to some, the outsourcing of most productive functions has cut down opportunities and led to a loss of professional skills (WP10 – p. 27).
- Qualification takes place as 'training on-the-job' and is received via a long work experience in the sector (WP11 – p. 104).

IT industry

- The levels of skills of R&D employees and software production workers brought into the companies are very high in all the cases – usually high level university or post graduate degrees. Levels of specialisation and concentration within one IT area of expertise are also very high (WP10 – p. 42).
- In many cases, commercialisation also led to a shift in skill or competency profiles with an increase in the demand for communication, selling and consulting (WP10 – p. 43).
- Generally, one can say that the restructuring process did not lead to a decrease in opportunities for skill acquisition or development. However, it did lead to a shift in the types of skills that employees are expected to possess (WP10 – p. 43).
- This however, increases the importance of soft skills, cultural competencies and temporal and spatial flexibility (German), (WP10 – p. 57).
- Workers and managers need considerable and increasing skills in intercultural communication intertwined with problem-solving ability and empathy towards collaborators and customers (*INIT*), (WP10 – p. 58).
- The cases in IT software are characterised by work forces who entered the companies with high levels of skills. (WP10 – p. 58).

- In several cases, it has also led to a formalisation in the job classification structure and the way skills are classified in the company (WP10 – p. 58).
- In the German case the company offers its own educational programs divided into a ‘qualified and a highly-qualified level’. Apprentices in these programs are trained on the company’s own software. Learning at work is supposed to take place on-the-job (WP10 – p. 59).
- The formal qualification has been changed in terms of increasing functional specialisation (German), (WP10 – p. 59).
- The new skills mix, combining IT skills and ‘soft’ skills with an increasing weight of communication or management skills, changes both the image and the identity of the developer (WP11 – p. 85).
- Skills development and training are characterised by a strong individualisation process. Each employee is left rather alone in facing his own employability (WP11 – p. 89).

Food industry

- Since the restructuring process, *Beer AD* has had problems occupying certain positions. The reason is that the company requires very high qualifications and offers comparably low salaries (WP10 – p. 72).
- A traditional division of labour exists between processing and production/packaging departments with the former having higher levels of skill and higher levels of status (WP10 – p. 73).
- Greek case – Workers are basically categorised as unskilled, although they do acquire a large amount of tacit knowledge for their work, an aspect given recognition in the Greek, but not in the newly acquired Bulgarian site (WP10 – p. 74).
- These trends do not involve much upskilling (WP10 – p. 76).
- The level of skills and education in the food production plants in all of the sites is quite low. There is a traditional division in skill levels between tasks in some more complex processing of food, in the skilled maintenance personnel or management and the regular production or packaging departments, there are also differences between countries (WP10 – p. 77).
- In the Italian plant *ND*, the large majority of workers are either specialised or non-specialised manual workers with medium-low educational levels. Upskilling occurs mainly in food processing and IT (WP10 – p. 77).
- In the Greek plant *Co A.*, there are mostly unskilled workers, but with a lot of work experience and tacit knowledge (WP10 – p. 77).
- In the Bulgarian brewery *Beer AD*, the production workers have some vocational education or secondary non-specialised education (WP10 – p. 77).
- In *Maltco* there was a tradition of on-the-job learning also in the combination with internal mobility (WP10 – p. 77).
- In the new plant of *Meat Inc.* in Denmark, higher levels of skills are evident than in the cases in Southern or Eastern Europe. There are 1,450 workers of which 1,136 are semi-skilled or skilled slaughterhouse workers. However, when recruiting new workers, the company does not demand any formal skills (WP10 – p. 77).
- Upskilling can occur in IT qualifications and management training, but this is the exception (WP10 – p. 77).

- In the Norwegian fish plant *FC*, a clear majority of the employees have no formal education relevant to their job (WP10 – p. 78).
- In the UK plant, the management levels do have opportunities for learning and development (WP10 – p. 79).
- The food industry, particularly in production, is a sector utilising a relatively high share of low-skilled labour and displaying traditional forms of work organisation and division of labour. Nonetheless, there are aspects of work that are quite knowledge-intensive, for instance in the R&D function, with the introduction of new genetic biotechnologies, freezing techniques, use of flavouring or chemical additives. Also, in logistics, as worldwide distribution networks are highly-computerised and customer-orientation has led to large increases in product diversity and short delivery time frames (WP10 – p. 65).

Public sector and services of general interest

- Looking at formal skill structure, the Norwegian and the UK cases showed that some of the work forces have formal qualifications, while others lack IT-related certificates. In the UK case the younger workers but not the older ones have formal qualifications. In the Norwegian case there is a divide along gender lines: women lack formal IT qualifications which, in this case, have a disadvantage of negatively impact on wages (WP10 – p. 95).
- As far as changes in skill requirements are concerned, software developers in this case (UK) experienced the changes as deskilling. Using existing templates and systems instead of developing their own software considerably alters their work (WP10 – p. 97).
- German case: while the private IT company *MM Spinoff* has a very high-qualification level – 80 *per cent* of the workers are university graduates – on the side of the public organisation – the police force – people had only had internal training as police officers (WP10 – p. 98).
- The Portuguese hospital – the private IT company *IT Health care* has highly-qualified workers (...) they have usually come directly from universities and the company provides training either in Portugal or abroad, in-house training or in external companies (WP10 – p. 98).
- Dutch case: the municipal worker experienced deskilling related to the legal-substantial aspects of their work (WP10 – p. 99).
- Changes in work organisation and ensuing skill needs are partly experienced as deskilling (WP10 – p. 100).
- A relatively low level of formal skills is required, so a short training is enough to enable staff to do their jobs (WP10 – p. 123).
- Formal skills and therefore formal qualifications are mostly of minor or even no importance (...). Many agents have a higher educational level than the actual content of work demands (WP10 – p. 125).
- Most critical for a successful performance of frontline service work seem to be social skills and adaptability to variable customer contacts (WP10 – p. 125).
- What is of increasing importance throughout the various cases under study are general skills in handling computers, handling customers and coping with high workloads, high pressure and repetitiveness (WP10 – p. 125).

- Since formal qualifications are generally quite unimportant and knowledge about customers and about the information for the customers is increasingly technically archived and retrievable by means of ICT, much of the training is focused on learning to interact with customers as smoothly and effectively as possible. The main training is therefore in social skills as well as technical skills (WP10 – p. 126).

1.3 Quality of life - D

1.3.1 Work-life balance - including gender and occupational issues D1

Clothing industry

- 90 *per cent* of workers are women (WP10 – p. 23).
- The female designer point out that it is impossible to combine a job as a designer and career with family planning (WP10 – p. 25).
- For the freelance designer, it does not mean necessarily more precariousness, but more often more autonomy in time management and feeling of freedom towards the contracting company (WP11 – p. 35).
- The job is an essential part of the individual life concept and the occupation has a central meaning within this concept (WP11 – p. 38).
- Having and growing children is most often seen as a problem for women designers (WP11 – p. 44).
- Work-life balance is a difficult issue for this occupational group. Designers have blurring boundaries between work life and private life (WP11 – p. 45).
- Although mainly feminine, the occupational group of dress designers present several features of traditional male biographies (WP11 – p. 45).
- Part-time work or flexible working time arrangements, as a way to seek for conciliation between work and family life, are not widespread in this occupational group (WP11 – p. 46).
- The overall constraints – time pressure, acceleration of collections renewal, impacts on designers of the worldwide organisation of the workflow, increasing role of information and communication technology – apply to both men and women, but however with differentiated effects on the work-life balance. Particularly, the issue of motherhood is an important aspect on the life of women designers that biases their professional development (WP11 – p. 46).
- In none of the analysed cases special family-friendly settings like *e.g.* day care centres were offered by the firms. However, in some cases formal as well as informal working time arrangements were provided in order to ease the combination of work and family (and food), (WP11 – p. 113).
- There are no family-friendly policies for the occupational groups of dress designers or attempts to introduce family-friendly measures in the firms (WP11 – p. 44).

IT industry

- Women were highly-underrepresented in all of the cases (WP10 – p. 39).

- Some blurring of work and life is perceived as 'natural' for researchers (WP10 – p. 42).
- Women were underrepresented in the IT sector at high levels of qualification. Thus women in the organisations tended to be involved in administrative or secretarial tasks (WP10 – p. 42).
- Some special mobility, especially short-term travel for troubleshooting missions at customer sites is a feature of work in many cases and generally accepted although it disrupts everyday life and family arrangements (WP10 – p. 54).
- The company (*Business-Software*, Germany) has introduced flexible time schedules and home-office stations as well as the technical equipment to facilitate work-life balance. About 1/3 of the work force are women, which is a high proportion for German in the IT sector. However, few women are found at higher management levels (WP10 – p. 55)
- *DomainSoft* in Hungary, it is estimated that about 80 per cent of the work force is male (WP10 – p. 55).
- *DomainSoft* – Altogether about 20 per cent of the work force is women, and the work force is very young (WP10 – p. 56).
- *Messenger* in Austria employs 45 persons in product development. Only two are women. Very young (WP10 – p. 56).
- About one quarter of the work force is women. There is however, a very small number of women in higher management levels. The downsizing that took place in 2005-2006 resulted in a very young age structure: between 30-40 years (*INIT*), (WP10 – p. 56).
- Institutionally family-friendly policies have only been reported from Norway (WP11 – p. 66).
- Work-life balance, the restructuring processes (globalisation, market-orientation, new hierarchies in the company) in some cases have created more 'difficulties' (WP11 – p. 67).
- Temporal pressure is more perceived by female R&D workers, mostly because they have to harmonise these changes with family needs (WP11 – p. 69).
- No case study mentions any family-friendly policy in the studied companies (WP11 – p. 92).
- Despite high workload and sometimes long working hours, the general work-life balance is positively assessed by a large majority of interviewees (...). Flexibility in working time organisation and arrangements is positively appraised and compensates the high workload. A good work-life balance is considered as an individual matter (WP11 – p. 93).
- In terms of work-life balance it must also be said that a fair amount of flexibility exists in arranging working schedules which may help both women and men to arrange family responsibilities (WP10 – p. 45).

Food industry

- The food sector still has a very established form of work force segmentation according to gender and ethnicity. The case studies show that there is pronounced segregation according to gender in most companies. Women dominate the more monotonous jobs, e.g. on production lines, while all technical and more advanced tasks higher management positions are occupied by men (WP10 – p. 70).

- There is informal time flexibility which allows mothers to change shifts according to their caretaking obligations, but only during off-peak periods (Greek case), (WP10 – p. 75).
- The role of customer has increased. However, production units experience this only indirectly in the forms of peak periods and in some cases, work intensification (WP10 – p. 76).
- In neither of the firms special family-friendly setting were provided. However, in general no major difficulties regarding the combination of work and family were reported (Logistics), (WP11 – p. 131).

Public sector and services of general interest

- Most of the workers are women who are trying to combine work and care duties. The municipality now only engages workers who are willing to work longer hours. This may lead to problems in reconciling employment and care work (WP10 – p. 95).
- The Norwegian case stands out with a ratio of 60 to 40 between men and women employed in the IT service provider IT Health, while in the UK and in Germany 70 *per cent* and in Belgium and Portugal 90 *per cent* of the employees are male. The Swedish case is about wage administration and not IT proper; here 90 *per cent* of the employees are female (WP10 – p. 95).
- Customer service is over-proportionally dominated by women in white-collar positions, compared to other business functions (...), 60 *per cent* to 70 *per cent* of call centre agents are women. This gender composition has not changed as a result of restructuring (...). Comparably low wages, flexible working hours and communication work in customer services are characteristics of traditionally female-dominated sectors (WP10 – p. 117).
- The only cases that mention the existence of family-friendly policies within the organisations are the British and Belgian cases (WP11 – p. 152).
- Work-life balance is mainly a problem attributed to women, who faced the problem of distribution of household work and taking care of children (WP11 – p. 157).

1.3.2 Personal valorisation D2

Clothing industry

- Technical designers have typically organisational careers, sometimes after some other short work experience elsewhere in the textile and clothing sector (WP11 – p. 34).
- Trajectories of fashion designers are much more different and diversified (WP11 – p. 34).
- Changing company is also a better way to get a carrier progression, from assistant designer to designer, chief designer, head of design department. As such positions are rather rare and, as recruitment is based on accumulated experience, designers have to move where they are available (WP11 – p. 35).
- Organisational settings strongly influence the career trajectories of designers (WP11 – p. 37).

IT industry

- Mostly junior researchers have the possibilities of academic trajectories offered by the companies (WP11 – p. 55).
- On the basis of restructuring processes and economic growth both companies have offered to its R&D workers new professional opportunities (WP11 – p. 56).

1.3.3 Training D3*Clothing industry*

- Few training opportunities are offered to the design workers in the clothing industry. The artistic dimension of the occupation reinforces the feeling that basic design skills are a talent, which cannot be acquired by formal training but learnt ‘on-the-job’ (WP11 – p. 42).
- They assume training has a professional investment, and only take it with certainty that they will get profits from their training efforts (WP11 – p. 42).
- Training is merely organised in addition to the working hours and rise the workload, which is not favourable to women with family constraints (WP11 – p. 46).
- Learning and training processes take place mostly ‘on-the-job’. At the beginning, the workers learn from experienced colleagues. Formal training takes place rarely. ‘Learning by doing’, work experience is therefore the most important way for further education (and food industry), (WP11 – p. 110).

IT industry

- Formal training opportunities are, in contrast low (WP10 – p. 42).
- Training in the companies tend to be on-the-job although there are some programs for formal skill acquisition (WP10 – p. 59).
- Training is offered for programming languages and general technical development, although employees also learn privately by surfing the net and reading in their area expertise. Employees report that the most effective learning takes place in working in teams and by changing tasks and positions (*INIT*), (WP10 – p. 60).
- Through the closed relationship to academic research the R&D workers in all four countries are holding academic/engineer degrees or even PhD mostly in math, computer sciences or natural sciences (WP11 – p. 55).
- In all four case studies the research activities of the occupational group is reflected by the high level of formal qualification on the one side (WP11 – p. 55).
- For this occupational group learning and skills development is an integral part of the work (WP11 – p. 61).
- Learning and skill requirements are considered as organisational tasks that means that the organisation makes it possible for individuals to attend courses and conferences, but the employees have to arrange an individual learning strategy (WP11 – p. 62).
- The necessity of lifelong learning on this occupational group is part of the self-conception of the R&D workers. According to the report the management of learning strategies implies a wide range *i.e.* English language, software skills and managerial skills.

The training strategies mainly are embedded into the companies' culture and the general rule seems the knowledge transfer from the older to the younger R&D workers (WP11 – p. 63).

- Learning is another component of the occupational identity: learning by doing, keeping up technological and methodological knowledge, self-learning (WP11 – p. 85).
- Two patterns of skills development coexist in all case studies: informal learning and formalised training (WP11 – p. 89).
- The training budget is assessed as insufficient by most of interviewees. They talk about difficulties to access external training, lack of budget, lack of planning, discrepancies between the official generous discourse of the company and its miserly and discretionary practices (WP11 – p. 89).

Food industry

- In the Bulgarian case *Beer AD*, the aim was to increase the technical competence of the staff, which is very usual in companies under restructuring. This was followed by the strategy to reduce the average age of the staff. Instead of training existing employees, the policy was to recruit new highly-qualified people. This turned out to be quite difficult given the relatively bad pay and unpleasant working conditions (WP10 – p. 72).
- Restructuring has not altered the skill content of the jobs and there are no formal training opportunities in the company (WP10 – p. 77).
- The training is on-the-job by watching and trying (*FC*), (WP10 – p. 78).
- Danish case: there is also no difference in salary or working conditions for skilled and unskilled workers: the only difference is the opportunity to be selected for management programs (WP10 – p. 78).
- In Norway *FC*, it is in the less skilled fillet production that workers are encouraged to obtain an completed certificate of apprenticeship and will be supported in doing it (WP10 – p. 78).
- In the other cases, further training is conducted mainly on-the-job and is kept to a minimum (WP10 – p. 78).
- (Logistics) The employees stated that most relevant skills and knowledge are gained 'on-the-job' (WP11 – p. 128).
- It seems that the development of skills and learning in logistics is highly-dependent on the hierarchical level of the employees. While office employees mainly improve their skills by learning on-the-job, logistics managers are highly-supported by the company to improve relevant skills (Logistics), (WP11 – p. 129).

Public sector and services of general interest

- Training provision in *IT Health* is described as good: to be competitive on the labour market the public organisation has to offer good access to training (WP10 – p. 95).
- UK and Swedish cases the initial training of workers focused on company culture. The main aim is thus to change work attitudes of the former public administration workers than to provide new knowledge and skills (WP10 – p. 101).
- The main training is therefore in social skills as well as technical skills (WP10 – p. 126).

- Besides training organised by the company, continuous learning from experienced colleagues or team leaders as well as learning by doing are mentioned in several cases studies as sources of gaining the appropriate skills to master the demands of frontline service work. In some cases these forms of learning have been the only possibilities to adapt to new challenges, because companies failed to offer training opportunities to their employees (WP10 – p. 126).
- Training is mainly focused on the content of work (WP11 – p. 149).
- There is a lack of training policy in several countries, with an increasing use of eLearning as a support for self-training (WP11 – p. 157).

1.3.4 Quality of work D4

Clothing industry

- Increased instability, unpredictability and insecurity (WP10 – p. 9).
- Workers in several companies make up a small community of ‘survivors’ of previous downsizing who have had to accept considerable work intensification and no increases in pay for years (WP10 – p. 23).
- (Portuguese case *WW-DK*) Its central position in the value chain does not appear to translate into improvement of working conditions. The designers report very short development times and a constant need for speed (WP10 – p. 25).
- (Germany – *Menswearco*) The working conditions of designers generally speed of production, workhours and stress have increased (WP10 – p. 25).
- Working conditions become increasingly pressurised even though work is being upgraded in Europe. Most employment after the downsizing of production is full-time and permanent, but pay is on the low side and working times can be long or even excessive (WP10 – p. 30).
- The key impact on designers is the acceleration of the renewal process of collections and models. Designers are increasingly working under continuous time pressure, whilst traditionally their creativity and work rhythm were determined by two annual collections (WP11 – p. 37).
- Time pressure comes from tighter deadlines, more tasks to do within a shorter time, accelerated renewal of collections, constant feedback from the market (WP11 – p. 42).
- As regards working time, various kinds of formal arrangements are observed in the concerned companies: fixed or flexible work schedule, compensation of extra hours by free time or holidays, or project-based work without formal time schedule. Anyway, almost all interviewees are working longer than the formal work schedules (WP11 – p. 43).
- Time pressure leads to an impoverishment of creativity for designers (WP11 – p. 43).
- Insecurity about current employment and the fear of job losses is present in the cases studies from Southern Europe and Belgium (food), (WP11 – p. 105).
- In general the payments in production work are low (and food industry), (WP11 – p. 112).
- The level of job satisfaction of production workers is generally low due to monotonous and repetitive tasks (and food), (WP11 – p. 112).

- Mostly of the production workers did not experience phases of unemployment or frequent job changes (and food), (WP11 – p. 117).

IT industry

- Forms of control are also very informal in all of the cases. Most employees don't have to formally record their hours ; they tend to keep their own records, and the expectation seem to be that they would tend to work more rather than less of the required hours (WP10 – p. 40).
- Performance in the projects is part of the evaluation process, in almost all of the cases, for wage negotiation and bonuses (WP10 – p. 40).
- An expected work intensification or more precarious employment relation in these labs and companies was not found. Most of the employees have, at least on average, a standard employment relationship as well as standard working week (WP10 – p. 40).
- External priorities affect *A NOR* plans much more than one to two years ago, and the pressure is likely to increase (WP10 – p. 41).
- Working times have much in common with other professional and academic work situations. They tend to be longish and may be extensive (WP10 – p. 42).
- Also due to commercialisation, there was an increase in standardisation and formalisation of tasks, but not in the sense of them becoming 'simpler'. The goal of standardisation was to promote product stability and to facilitate communication between project members and groups, also along the value chain. (WP10 – p. 43).
- The straightforward standardisation is more an exception than the rule across cases (WP10 – p. 51).
- Overall, especially in the more integrated cases of relocation, the pressure on developers and project managers increases at both ends of the outsourcing relationship. Time-to-market is supposed to be speeded up, and deadlines are tightened (WP10 – p. 54).
- While German and Hungarian developers report rigid timeframes and high workloads that limit their use of the discretion they formally have, Swedish, Bulgarian and also Croatian engineers report working times close to a 40 hour week (WP10 – p. 54).
- Generally, the restructuring processes have not changed employment conditions. In fact, benefits have been extended and employee stock options have made employees strongly identified with the economic objectives of the company (WP10 – p. 55).
- There also appears to be quite a bit of work intensification at *DomainSoft* Hungary (WP10 – p. 56).
- *Digit*, Croatia: the restructuring did not affect employment conditions. There was a transfer of workers, no changes of contracts, no redundancies (WP10 – p. 56).
- The restructuring has involved a heavier workload and higher intensity for the remaining workers as well as increased formalisation of the work process (*INIT*), (WP10 – p. 57).
- In most of the cases, restructuring has resulted in a formalisation and standardisation of procedures for transferring information and knowledge, especially in documentation procedures (WP10 – p. 59).
- The employment context in several of the cases was highly positive: in Germany, Hungary and Bulgaria the employees reported better than average employment and work-

ing conditions for their country, which influenced their inclination to be involved with industrial relations (WP10 – p. 60).

- This aspect influences the perception of quality of work and it seems that the need for mobility and flexibility rarely can be combined with family planning or work-life balance (WP11 – p. 64).
- In some cases the increasing workload as well as temporal density at work is perceived as losses of quality of work (WP11 – p. 65).
- The need of mobility and the increasing need of flexibility have partly produced the perception of losses by some R&D workers (WP11 – p. 65).
- Many interviewees perceive standardisation as a threat for their own expertise. Expertise becomes easily transferred or shared, and specialist become more interchangeable (WP11 – p. 87).
- Interviewees are generally satisfied with their working conditions, despite an increasing workload to internationalisation of markets and worldwide competitiveness (WP11 – p. 91).
- Autonomy is one of the most appreciated features (WP11 – p. 91).
- Working time is generally flexible. The work schedule consists of basic core schedule, for example 9:00 to 15:00, completed by flexitime before and/or after, according to the workload and to individual needs. Longer working hours in case of work overload can be compensated by days off or shorter working days, when possible according to the needs of the company. Working time arrangements are individually negotiated. Overtime is very frequent in several countries (WP11 – p. 91).
- Part-time work is not really welcome in software development. Part-time working is implicitly considered as a renouncement to a good career progress (WP11 – p. 94).

Food industry

- Also customer demands have increased, which affects the rhythm of work, sometimes leading to work intensification in peak periods. The attempt to respond quickly to market demand and the fact that the products have to be processed quickly has led to increased pressure for efficiency and speed in all the cases (WP10 – p. 70).
- In the Italian case, basically large differences in the working conditions exists between the home company *ND* and the outsourced company *Hydro*, which has much less-attractive working conditions (WP10 – p. 74).
- There has been a work intensification experienced in all operations: set up, repair and hygiene – also, an increase in quality control (...). Work intensification is in part linked to an increase in customer demands (WP10 – p. 75).
- At the fish farm work is characterised by a high level of autonomy from workers who have many years of experience working for the original company (...). At the fillet production unit, in contrast, the work is more fixed and standardised (WP10 – p. 75).
- The workers have more machines to operate, and the workers rotate between different tasks, and this has made the work somewhat less repetitive (fillet production), (WP10 – p. 75).
- In the logistics areas, the increased role of customers is directly felt in work intensification during peak periods (WP10 – p. 76).

- Additionally the growing attention to customer demands for more flexible working time arrangements (in most of the cases), (WP10 – p. 81).
- The Danish cases describes an increased intensity of work (WP11 – p. 111).
- In some cases the work intensity increased due to a higher efficiency in working tasks as well as to the need for temporal flexibility (and clothing), (WP11 – p. 111).
- Through the introduction of the concept of just-in-time delivery the branch also is accustomed to speeding-up processes (Logistics), (WP11 – p.127).
- The satisfaction with work as well as working time arrangements differs very much regarding countries and hierarchical levels. Belgian office employees have a very low satisfaction with work. In the other cases the satisfaction with work is much higher, however leading to irregular and long working hours for the Bulgarian employees and managers (Logistics), (WP11 – p. 131).
- In the Bulgarian case the shift towards privatisation has led to an increasing intensification of work on all organisational levels. The intensification is described as speeding-up process, an increase of the working time as well as additional shifts and changing demands on skill requirements (Logistics), (WP11 – p. 133).

Public sector and services of general interest

- Partly, outsourcing and centralisation led to the harmonisation of employment conditions of IT workers who previously worked under quite different terms and conditions in different organisations (WP10 – p. 96).
- While some of the IT workers have to meet unpopular mobility demands, for others the abstract new opportunities are not significant because mobility would be need to seize them (WP10 – p. 96).
- In terms of job security, enormous differences exist between the companies and the countries under investigation. While the British workers feel rather insecure in spite of contractual arrangements, the Norwegian IT workers, kept their job tenure regardless of the change of employer (WP10 – p. 97).
- The IT workers thus experience higher standardisation and less autonomy (UK), (WP10 – p. 98).
- The police-academy teachers experience the greatest standardisation and formalisation in their work (WP10 – p. 98).
- German case: ‘the private sector employees’ work very long days when a project schedule requires it and take the time off at a later date. The public sector employees were not used to this working rhythm, and have had to adapt to it in order to maintain an equal role in the development of the project (WP10 – p. 100).
- On the one hand, it is labour- and cost-intensive and traditionally characterised by working conditions well above those in private sector companies such as retail or call centres. Hence, the savings through outsourcing appear attractive. On the other hand, the quality of customer service is by definition critical for the legitimacy of public sector privatisation and liberalisation, since losses in quality affect ‘customers’ who are tenants, citizens and voters as well (WP10 – p. 106).
- In the case of *Citylife*, the spatial and personal separation of face to face and call centre service led to an improvement in the working situation of employees engaged in face to face interactions with customers, because there were no more interruptions by tele-

phone calls. On the other hand, employees had to fulfil additional functions and are subject to stricter time controls, so that work density and co-ordinating demands have not decreased but increased (WP10 – p. 113).

- An increasing concentration of staff at the large stations, which meant that employees had to accept much longer journeys to work than they previously had (...). This staff-reduction strategy is very similar the Austrian Post's. Since 1996 there have been several waves of staff reductions, which were mainly achieved by early retirement and special payments to sweeten voluntary redundancies (WP10 – p. 116).
- Due to restructuring (...). In general, employment contracts have become looser and more flexible, and employers are trying to recruit flexible staff who can deal with changing workloads and regional transfers (WP10 – p. 118).
- Employment contracts at subcontractors are mostly fixed-term or even freelance contracts, which have very low employment security, lower salary and negative effects on individual social security compared to the contracts for employees in in-house departments (WP10 – p. 118).
- A common problem for employees in customer service, besides high workload, work intensification and strenuous customers, is a working situation in which employees are somewhat tied to the workplace and with few opportunities to avoid customer contact (WP10 – p. 122).
- To make this possible (functional flexibility) there is standardisation, often also some kind of specialisation of units and technical control to keep the tasks simple and to reduce the possibility of mistakes (WP10 – p. 123).
- Staff shortages led to increased workload (WP11 – p. 150).
- In this context (less staff and more tasks), time pressure gets obviously higher with restructuring (WP11 – p. 150).
- Resulting from the aim to be more customer-focused, working hours have been extended (WP11 – p. 150).
- The restructuring processes have several consequences on work organisation and quality of work: staff reduction and correlative increased workload lead to higher time pressure; the number of temporary jobs or freelance contracts is increasing; new management methods are introduced to measure or enhance the performance of workers; an increasing limitation of the labour market/career opportunities, due to the subdivision of former big organisations into smaller companies or units; the function becomes completely customer-oriented, leading to hire people with special background (WP11 – p. 157).

1.4 Policy of working life – E

1.4.1 Cultural values E1

Nothing to report.

1.4.2 Norms and regulations E2

Food industry

- Single market in the European Union in the early 1990's (WP10 – p. 11).

Clothing industry

- Multifibre Arrangement (MFA) and the liberalisation of EU trade during the 1990's (WP10 – p. 13).
- Outward processing trade (OPT) arrangements allowed for export of materials to these low-wage countries by European producers and re-import of finished garments with minimal trade tariffs on the value-added abroad (WP10 – p. 13).
- Companies with fifteen or fewer employees (...) like *Newsweat* are covered by the collective agreement for handicraft enterprises (WP10 – p. 24).

1.4.3 Globalisation factors E3

Clothing industry

- Concentration on core activities and outsource non-core activities (WP10 – p. 9).
- Relocation of work and the emergence of global value chains in more and more industries (WP10 – p. 9).
- Outsourcing is part of a structural shift in the economy that led to the emergence of large scale, global service provider and supplier companies (WP10 – p. 9).
- 'Head and tail' companies (WP10 – p. 11).
- Highly-internationalised and highly-fragmented value chains (WP10 – p. 13).
- Concentration process in the retail industry (WP10 – p. 13).
- Increasingly relocated and outsourced production to low-cost countries (WP10 – p. 13).
- Value chain restructuring has thus been at the core of company strategies of adaptation and competition during the last decades (WP10 – p. 13).
- French clothing company (*Adele*) closed its factories in France in the 1980's. They only kept a small pilot production unit with strong technical skills. Half of the products are sourced from subcontractors in Central and Eastern Europe (WP10 – p. 15).
- *Adele* has moved to constant replacement of items in the stores (...) tends to partly outsource the design process (WP10 – p. 15).
- The Italian company (*Green S.p.a.*) carried out at home the highly-quality products, but the production of samples is often outsourced to Italian subcontractors (WP10 – p. 16).
- International competition and the saturation and instability of demand made it necessary to increase flexibility and to lower costs (*Green S.p.a.*), (WP10 – p. 16).
- The Belgian company (*Wonderwear*) (...) growing production volumes and increasing product variety led to the outsourcing of production to a Chinese company in the 1980's already (WP10 – p. 16).
- Production can be both relocated in-house to low-cost regions and outsourced (WP10 – p. 17).

- The family-owned German business (*Menswearco*) (...) had outsourced the production to Poland and Romania in the 1990's (WP10 – p. 17).
- In contrast to the situation some twenty years ago, the value chain has become rather fragmented: the fabrics are no longer produced in-house, the garment production was fully outsourced. However while the company focuses on the design, logistics and marketing, it actually controls large parts of the value chains (*Menswearco*), (WP10 – p. 18).
- *Texport* is a Portuguese shirt-maker company that reduced employment from fourteen to twelve through outsourcing (...) focuses on the creation of samples (...). In spite of somehow moving up the value chain the position of the company remains weak (WP10 – p. 18).
- *Trousers Company* from Germany (...) the establishment of an own production site in Romania in 2002, the strengthening of the logistics function and engaging more and more in retail activities (WP10 – p. 18).
- In addition to the Romanian production subsidiary the company has long-term relationships with forty to fifty subcontractors in the Mediterranean region, in Central and Eastern Europe and in Asia (*Trousers Company*) (WP10 – p. 18).
- The Greek company (*Co B.*) (...). To reduce production cost the company has established a plant in Romania as a fully owned subsidiary where 45 *per cent* of the stitching and packaging has been moved (WP10 – p. 19).
- *Copy Fashion* (Hungarian company) (...) is a subcontractor. The German customer however still controls the production process (WP10 – p. 20).
- *Copy fashion* it self has also outsourced production (...) mainly to Romania, Bulgaria, Ukraine and Turkey (...) not entirely successful as it collided with customers' increased demand for quality (WP10 – p. 20).
- *Copy Fashion* has managed to keep high-quality production in Hungary while low-quality products are now manufactured in Romania and Bulgaria (WP10 – p. 20).
- The Portuguese logistics company *Glog* (...) has outsourced the transport of clothes to subcontractors (WP10 – p. 21).
- Outsourcing (...) is a declared policy of the company (*Glog*), (WP10 – p. 22).
- The main market of these textiles is West-Africa where *Geisha* established subsidiary plants that produce cheaper versions of the prints (...) in the Netherlands are producing the high-quality products (WP10 – p. 22 & 23).
- Offshoring has taken place since the 1980's and 1990's throughout the industry and moved further East in the process (WP10 – p. 23).
- Overall, in the countries participating in the study, we are observing the restructuring of the 'higher end' of the value chain. This includes the transformation of former outsourcing destinations, manufacturing and retailing companies in Southern Europe into providers of higher value-added functions covering design, co-ordination and/or logistics. However, this development does not necessarily shift power to companies who are upgrading their business in Europe, and it may be temporary (WP10 – p. 29).
- The pressures of the market increase across the board. Fashion becomes more short-cycled and the availability of ICT-based merchandise information systems allows for feeding sales information immediately back into the production and design function (WP10 – p. 29).

- Regional and cultural proximity still plays a part in companies' selection of subcontractors, as fashion cycles are shortening and reliability and responsiveness continue to matter in addition to cost considerations (WP10 – p. 30).

IT industry

- Emerge of global companies that supply services to other companies (WP10 – p. 11).
- Large IT companies, concentration on core competencies and products also opens up some space for smaller organisations in areas that are not deemed 'core' (WP10 – p. 32).
- The value chain are quite complex in internet-related software R&D (WP10 – p. 32).
- *Japtech* decentralised its speech technology research from Japan to Cambridge UK and Beijing (WP10 – p. 34).
- In Software development we observe considerable transnationalisation. EU New Member States play a large part and have been doing so for quite a while. As outsourcing destinations, they still represent an attractive combination of high skills and low pay (WP10 – p. 47).
- Patterns of outsourcing generally are related to complex ownership and take-over histories rather than purely market – or company – driven strategies. The German case of *Business-software* is the prime example of a very co-ordinated, top-down transnationalisation with multiple aims, such as cutting cost, as well as gaining access to foreign markets and to IT talent abroad (WP10 – p. 47).
- Hungary *Domainsoft* is a unit within the software subsidiary of an electrical engineering multinational based in Germany, where projects are assigned by internal tendering on the basis of fixed hourly cost. Since the company also has units in lower-wage countries such as Slovakia, the Hungarian unit has moved further up the value chain and taken over more value-adding tasks (WP10 – p. 47).
- Competition is moderated both by the need for collaboration and the location-specific build up of particular expertise (WP10 – p. 48).
- The *Business-Software*, Germany is a large multinational company. The company has been 'growing organically', expanding and establishing own subsidiaries in more than fifty countries worldwide since the 1990's rather than acquiring other companies (WP10 – p. 48).
- *Domainsoft*, Hungary, since 2001 it has been internationalising further with subsidiaries in Romania, US, Turkey, China, partly for cost reasons and partly for reasons of proximity to the respective markets (WP10 – p. 49).
- *Messenger/Digit*, Austria and Croatia, both companies were acquired independently by a US-based corporation. Project management is located in Austria and assigns parcels of work to Croatian teams that are formed anew for each assignment (WP10 – p. 49).
- *INIT*, Sweden/American company, it has 4,000 customers in over forty countries and employs 200 engineers in product development in Sweden, 150 at its service partners in India and ten in the Philippines where offshoring is being relocated (...). Had two phases of outsourcing. An initial attempt in 2005 to offshore quality assurance and maintenance to two external partners in India had very limited success. It felt through since the knowledge transfer turned out to require more effort than was expected originally (...). After the merger with a US company for access to capital and the US market, a new offshoring initiative was started, this time establishing an owned subsidiary in

the Philippines which is supposed to take over maintenance and quality assurance and possibly, some development tasks (WP10 – p. 49).

- *SoftServ*, Bulgaria, start up with its headquarters in Switzerland (WP10 – p. 50).
- With the relocation of software development in general, remote locations tend to take over the more standardised functions first: circumscribed modules of software development, maintenance, quality assurance and testing. The amount of value-added and the management functions they take over varies, and this kind of work tends to get re-located at a larger point in time (WP10 – p. 50).
- Locations are not interchangeable. Indeed, they are forced to develop a profile of competencies, and especially higher-wage locations get under some pressure to justify their cost (WP10 – p. 51).
- Some customer-driven demands for flexibility, involving mobility and long periods of work off-site and in customers' locations are thus left to external companies and not an issue in the company itself (WP10 – p. 51).
- Generally, CEE subsidiaries also compete with Western locations on the basis of greater flexibility, longer working hours and willingness to work weekends. This results from their accepting fluctuating workloads and tight deadlines (WP10 – p. 52).
- In the Austria/Croatian configuration, this kind of competition is effectively inexistent (WP10 – p. 52).
- The Swedish business software company, *INIT*, has had a mixed experience with outsourcing and offshoring of work. It pursues an outsourcing logic following the product lifecycle, trying to offshore maintenance activities on mature and 'sunset' products, and also standardised tasks towards the end of development such as testing and quality assurance (WP10 – p. 52).
- Teams are translocal, and the South-East Asian subsidiary takes over tasks with lower priority (WP10 – p. 53).
- In the Swedish company *INIT* just over 200 persons work at the Swedish site; in India the number of subcontractors is about 150. The Philippine site is just being established (WP10 – p. 56).
- Relocation, either as outsourcing or in-house offshoring both requires and enhances some formalisation of specifications, interfaces or modules (WP10 – p. 62).
- Transnationalisation has advanced further in software development, but has led to a range of company-specific patterns rather than an industry-wide 'story' of value chain fragmentation or company restructuring (WP10 – p. 63).
- The key words in restructuring are outsourcing, mergers and international division of labour (WP11 – p. 83).

Food industry

- Although a shift in production activities toward Eastern and Southern Europe is visible, in fact, France, Germany, Italy and the UK are the leading producers of food and drink, accounting for 70 *per cent* of total EU turnover (WP10 – p. 65).
- *Co A*. (Greece): the opening of a subsidiary for pea production in nearby Bulgaria (...) the creation of a logistics division since 2004, which led the unification of planning and managing of flows (WP10 – p. 66).

- *FC* (Norway): the restructuring the report focuses on contains on the one hand the insourcing of a fish farm company in 2006 and the reorganisation of the fillet production since 2005, and on the other hand the co-operation with *Larry Seafood Group*, *FC*'s logistics partner, involved in sales, export and marketing of fish products (WP10 – p. 65).
- *Maltco* (Belgium): is a multinational company. It has production sites in Belgium, Netherlands, France and Luxemburg. In 2006 *Maltco* relocated its export operations department to a *Maltco* owned Business shared service centre in Prague (WP10 – p. 66).
- *Meat Inc.* (Denmark): due to centralisation of production a new and large plant was built in central Denmark in 2005. At the same time, *Meat Inc.* closed six smaller companies and outsourced some of the deboning activities to Germany (WP10 – p. 66).
- *Natural delicacy – ND* (Italy): currently underway is restructuring involving the insourcing of production of vegetables that had been previously outsourced to a company in the South of Italy called *Hydro* (WP10 – p. 66).
- *Kamentitza AD/Beer AD* (Bulgaria): in 1995 a Belgian multinational company privatised the formerly state-owned company, since then there is an ongoing outsourcing policy in terms of technology, technical equipment and production from Belgium to the subsidiary in Bulgaria (WP10 – p. 66).
- The sector is strongly locally embedded. Restructuring goes into all possible directions, we see outsourcing and subcontracting as well as centralisation and take-overs (WP10 – p. 67).
- All companies have in common that they feel an increasing pressure of international competition, but their strategies to survive on the market are very different (WP10 – p. 67).
- Other cases begin with a restructuring deriving from the privatisation of formerly state owned companies (*Beer AD*), (WP10 – p. 67).
- Our case studies show that the outsourcing of parts of production or logistics is not always a successful strategy over the long run. The case of *ND* the company outsourced processing and freezing of fresh produce, while retaining the packaging internally. Also R&D was kept in-house, for strategic reasons (WP10 – p. 68).
- *ND* is currently planning to gradually reinternalise those segments of production that have been outsourced. The reason for this is that in-house production 'would allow them to maintain a strict and more direct control on food processing and thus keep down wastage and delays due to the shortcomings of third parties (WP10 – p. 68).
- An example for a decision against outsourcing in the form of subcontracting is the Greek case of production of peas *Co A.*, which decided to open its own plant in Bulgaria rather than buying the peas of other companies abroad (WP10 – p. 68).
- Another form of value chain restructuring is centralisation. *Meat Inc.* which led to the closing of slaughterhouses, the construction of a new, big and more Taylorised one and the relocating of parts of production abroad (WP10 – p. 68).
- Restructuring in the cases presented here often involved a lengthening of value chains in the form of take-overs (Greece, Bulgaria) or outsourcing (Italy and Denmark for some processes). There were also simultaneous trends to centralisation and an accompanying standardisation, for instance the establishment of a new large scale slaughterhouse facility in Denmark which made the work more efficient and the tasks more specialised, the closing of two production sites for beer in Bulgaria and concentration in one site, and the insourcing of fish farming in Norway (WP10 – p. 69).

- There is a clear trend to outsourcing lower level work or at least keeping the most knowledge-intensive work at the headquarters or original site (WP10 – p. 69).
- Although some processing and deboning still take place in Denmark, more and more are being outsourced to lower cost sites. One such example are subsidiaries of *Meat Inc.* in Germany in which Polish workers on temporary contracts work longer hours for lower pay than is allowed in Denmark (WP10 – p. 69).
- A direct consequence of the centralisation of production that occurred during restructuring is an increase in the diversity in the group of workers, both in terms of ethnicity and geographical spread (WP10 – p. 72).
- The Italian case *ND* it becomes clear that working conditions of the subcontracting company are not at the same level as at *ND* itself (WP10 – p. 72).
- In both logistics and production, the centralisation of functions by large multinationals often resulted in redundancies at the local level. Another outcome is standardisation of reporting systems and procedures as well as a formalisation of organisational practices (WP10 – p. 81).

Public sector and services of general interest

- Large-scale outsourcing is a most recent phenomenon (WP10 – p. 11).
- The software and IT service industries have become major employers in most EU Member States, which includes software consultancy and supply, data processing, database activities and other computer-related activities (WP10 – p. 85).
- The rapidly growing market for IT outsourcing is increasingly international, and the major companies are global players (WP10 – p. 85).
- Public-sector organisations can be assumed to have basically the same motives for using external IT service providers as private companies (...) ‘access to specialist support’ more often and ‘lower IT costs’ (WP10 – p. 87).
- *Citycouncil – PROF*: local government in the UK outsourced its IT department to an international IT service provider. Most of the IT department stayed in the same offices but the 65 employees now have a new employer: the private sector IT company (WP10 – p. 87).
- *IT Health*: a regional health administration in Norway centralised the IT of all hospitals and health centres in the newly IT service provider *IT health*. This organisation is in public ownership but economically independent. The IT workers were transferred from the hospitals to *IT Health* (WP10 – p. 87).
- *ITPRO*: a public administration in Belgium has an open-ended contract with *EIG*, a consortium of IT companies that runs its IT (WP10 – p. 87).
- *Proconsulting*: an international IT service provider provides consultancy services to a public organisation in France regarding IT-based organisational change (WP10 – p. 87).
- *XY Data*: a Swedish public services organisation outsources personnel administration and the development of a new IT system for personnel administration to the large IT company *XY Data* (WP10 – p. 88).
- *GBA Easttown*: the local government of ‘*Easttown*’ in the Netherlands outsources the development and maintenance of the municipal database for personal records to the large IT service provider *GBA* (WP10 – p. 88).

- *MM Spinoff*: a German public administration forms a public-private partnership with *MM Spinoff*, a multimedia subsidiary of a large IT service provider, to develop a training portal (WP10 – p. 88).
- *IT Healthcare*: an international technology company provides medical hardware and software including related services to Portuguese hospitals (WP10 – p. 88).
- The restructuring of these public organisations and the ensuing external relationships take basically three forms: *IT outsourcing*: private IT service provision for public-administration organisations; *centralisation*: IT outsourcing to newly established, central IT service provider in public ownership; *business process outsourcing*: Public organisations outsource back-office functions to private companies; *public-private partnership*: joint technology development and application
- *CityCouncil* in the UK: that outsourcing may mean that the IT function is performed in roughly the same way as before but by a different company (WP10 – p. 91).
- In the Swedish case of the outsourcing of wage administration to the private company *XY Data*, the very function was not changed in this process. Again, the workers who got a new employer stayed in the same location (WP10 – p. 91).
- The Belgian service provider consortium *EIG* runs hardware, software and networks and maintains all IT for a public administration on the basis of an open-ended contract (WP10 – p. 91).
- In the Norwegian case the establishment of the IT provider *IT Health* for all hospitals in the region not only aimed at centralising the IT function but also at development common applications (WP10 – p. 92).
- In the German case the knowledge distribution and the power relations seem much more balanced than in other cases. The Belgian service provider *EIG*, in contrast, has a very strong role *vis-à-vis* the public administration (WP10 – p. 92).
- Public organisations try to avoid making themselves too dependent on the service provider and to keep open the option of putting the service out to tender again (WP10 – p. 103).
- Power relations are obviously influenced by the ability of organisations to monopolise knowledge and infrastructures. IT outsourcing leads to a shift of knowledge in which the service provider gains public-administration knowledge. In some cases the knowledge tends to be fully transferred from the public – to the private sector organisation (WP10 – p. 103).
- Increasing customer-orientation, rationalisation and reduction costs are important motivations for various forms of restructuring as seen in the case studies (WP10 – p. 106).
- *Citylife* (Austria), offers property management for council housing. Via a municipally owned enterprise, a kind of intermediary, the city co-operates with a consortium of subcontracting call centres, which took over the telephone-based customer service in 2003 (WP10 – p. 106).
- *Customer* (UK), set up in 2004, is a partnership between two local-government councils and a multinational private-sector service to a subcontractor (WP10 – p. 107).
- *DVLA* (Italy), is the public administration unit of the Driver and Vehicle Licensing Agency. In 1996 the company outsourced its telephoned-based customer service to a subcontractor (WP10 – p. 107).

- *EWA (Belgium)*, is a case of restructuring of customer service in regional administration, which is characterised by rationalisation and driven by IT technologies. The case focuses on the development of eGovernment since 2001 (WP10 – p. 107).
- *Intermed (Hungary)*, is the Hungarian national employment agency. Since 2001 there has been an ongoing modernisation of infrastructures and of services.
- *NEA (Bulgaria)*, is the national employment agency of Bulgaria, which has been affected by fundamental rationalisation since 2002. Services were standardised and levels of hierarchy and the number of employees were reduced (WP10 – p. 107).
- *PCC (Sweden)*: this case focuses on reorganisation of customer service in the Swedish police force. In 2000 the regional authority of Stockholm decided to implement telephone-based contact centres to take care of non-urgent customer requests (...) are organised as a separate unit with their own budget (WP10 – p. 107).
- *Austrian Post*: restructuring is characterised by the outsourcing of branch activities to private post office partners (WP10 – p. 107).
- *Dutch Telecom*: The restructuring is characterised by numerous manoeuvres of outsourcing and insourcing of telephone-based customer services, Dutch Telecom outsourced all of its contact activities to CSN, one of the oldest and biggest private call centre providers in the Netherlands. Nevertheless maintained a high level of managerial control (WP10 – p. 108).
- *German Railways*: Since 1994 have been subject to fundamental restructuring which resulted in a division of the value chain into an increasing number of smaller companies. This restructuring followed by reduction of personnel, building up of new services and an increasing degree of self-service (WP10 – p. 108).
- *Greek Post*: restructuring since 2001 onwards. Founded a subsidiary for courier services (WP10 – p. 108).
- *Swedish Post*: after the start of the closure of general post offices in 2001, services for delivering packages and special letters for private customers were outsourced to private partners (WP10 – p. 108).
- At *Austrian Post*, the post office partners represent outsourced front desk activities (WP10 – p. 112).

1.4.4 National policy context E4

Clothing industry

- New hires receive fixed-term contracts in Germany and Portugal where managers deem employment protection or permanent employment too high (WP10 – p. 23).
- In countries with an institutionalised apprenticeship system such as France, Germany, Italy or Hungary, skills are acquired through apprenticeships and technical college educations. Production work, however, where it still exists, is mostly unskilled or semi-skilled, and here workers learn by doing but gather company-specific skills through long tenure with the firm (WP10 – p. 27).
- The main national differences can be detected between the institutional arrangements of the Scandinavian countries in opposite to Southern Europe (and food industry), (WP11 – p. 105).

IT industry

- Research appears specifically embedded with the institutional environment since it often takes place at the boundaries of publicly-funded and for-profit activities, somewhat remote from the 'immediate' market (WP10 – p. 31).
- VR2 Germany is a small software company and their product was developed in the neighbouring university (WP10 – p. 35).
- The practice of working is embedded with each country's institutional context (WP10 – p. 42).
- Institutional and organisational pattern do matter in the case of changes (WP11 – p. 70).

Food industry

- The production sites themselves are strongly embedded in regional and local contexts (WP10 – p. 83).
- A successful model seems to be the Danish flexicurity model, which softens the effect of global market constrains for the individual worker by providing a strong social net as well as the support for a new working place (WP11 – p. 117).

Public sector and services of general interest

- The history and the experience of countries in restructuring their public sector are very different. For some countries, such as Italy, outsourcing strategies are relatively new. Other countries, such Britain, have already had years of experience of reorganisation of public services. (WP10 – p. 108).
- It becomes clear that it is not only a question of time or how countries organise their public services, but more a question of country-specific factors, such as the institutional framework, that influence developments in the public sector (WP10 – p. 108).
- Eastern European countries especially have totally different preconditions for restructuring due to their socialist past. Restructuring in these cases is often characterised by an orientation towards western forms of customer-relations management (WP10 – p. 109).
- Compared to this, Western countries more often tend to use national consultants (WP10 – p. 109).

2 Analyses of case studies

2.1 Introduction

In this annex, analyses of the organisational case study reports and the occupational synthesis report are reported. The analyses have been made on the basis of the model of work in the knowledge society developed in Chapter 2. The analyses show the decisions companies make in response to their perceived economic and political context. Assumed was that the differences in political context are related to national differences, while the difference in economic context is primarily related to sector differences that cause the structure of the market, production technology *etc.* to be different. A comparison of companies in the same sector, but in different countries shows how similar companies respond to differing political contexts. A comparison of companies in the same country, but in different sectors shows how companies in a similar political context respond to (changing) economic demands.

The empirical findings of the occupational and organisational case study analyses are outlined in the following sections. The analytical findings, that is: the conclusions of the case study analyses in terms of the model – are discussed in the report.

2.2 Occupational studies; synthesis report

Policy context:

- software professionals:
 - increase of flexible work;
 - skills supply problems;
- R&D IT:
 - birth rate differences between Scandinavia and Southern European countries suggest lack of family support policies in latter;
- manufacturing:
 - Scandinavia-Southern Europe differences in labour conditions policies;
- logistics:
 - Bulgaria: capitalist-industrial logistics sector;
 - The Netherlands: post-industrial knowledge-based, knowledge-intensive and highly-specialised logistics sector.

Economic context:

- increasing economic pressure for all:
 - knowledge-based and creative occupations;
 - manufacturing;

- service (including management) occupations;
- flexibilisation of work;
- increased customer orientation of work.

Company level, general:

- extended demand for skills;
- broadening of skills requirements made upon workers (information, management, communication).

ILM/Internal skill formation:

- individualisation of responsibility for skill formation;
- skill formation beyond borders of profession, more and more including service and communication skills.

Working time arrangements:

- speeding up design and R&D;
- work intensification.

Work organisation and value chain restructuring:

- production and service/consulting functions become blurred;
- outsourcing of manufacturing;
- services: downskilling next to upskilling;
- increased insecurity of job, increased social risks with, work-life problems.

2.3 Design in clothing

Belgium – clothing – design: Wonderwear design

Policy context:

- lacking formal education in dressmaking.

Economic context:

- time pressure;
- product and production process complexity:
 - creative and technical knowledge required;
 - problem-solving required;
 - communication to offshored units required.

Company level

ILM/Internal skill formation:

- training programmes for language and design;
- broadening of work content;
- upskilling: increased skill requirements for prototype production.

Working time arrangements

Work organisation and value chain restructuring:

- offshoring/outsourcing production;
- enlargement of prototyping unit;
- enlargement of design department.

Germany – clothing – design: Menswearco

Policy context:

- low organisation grade of designers;
- high overall organisation grade.

Economic context:

- emergence of the ‘new verticals’ (H&M, Zara) in the clothing industry:
 - clothing companies tend to aim at widening control over the design, production and logistical chain, while outsourcing production;
 - requires cultural, communicative and IT skills; tacit as considers design, general communicative and formalised IT skills.

Company level:

- product innovation:
 - construction kits;
 - added functionality to clothing products;
 - niches and specialisation.

ILM/Internal skill formation:

- skill formation on the job and formalised training;
- increased ICT use.

Working time arrangements:

- work peaks, increased workload and high peaks; high flexibility requirements made upon workers.

Work organisation and value chain restructuring:

- partial verticalisation:
 - outsourcing of production function to Poland and Romania;
 - insourcing and growth of design and logistics;
 - taking over some functions from retail: storage and sales risks internalised.

Portugal – clothing – design: WW-DK Têxteis

Policy context:

- high labour costs;
- strong safety regulations;
- limited child care availability;
- high work regulation;
- no union membership in company;

- high costs of dismissal and high job stability;
- inflexible holidays.

Economic context:

- increased speed of innovation and production;
- increased product variety;
- low cost requirements;
- companies in branch specialise and enter niches; companies integrate value chains;
- increased competition.

Company level

ILM and skill formation:

- language training 'off-the-job'.

Working time arrangements and contractual arrangements:

- introduction of WWOTS-IT system aimed at:
 - improving servicing;
 - just-in-time delivery;
- high knowledge and flexibility requirements, coupled to relatively high salaries;
- social help (mentioned is in case of divorce), so that employees can concentrate on the work;
- engaging creative workers;
- increased complexity and speed of communication;
- strong temporal flexibility of the work, because of communication around the globe;
- difficult work-life balance.

Work organisation and value chain restructuring:

- outsourcing of all low value added work;
- two processes of value chain restructuring:
 - CMT: keeping material and design in-house; outsourcing the other business functions;
 - SOD: design in-house; other functions outsourced;
- testing and production outsourced to Portugal, Brazil, India, Turkey, Egypt;
- new product: value chain management and network-work:
 - servicing over the range of the value chain;
 - guaranteeing flexibility, speed, creativity, quality for customers;
 - specialisation.

2.4 R&D in ICT

France – ICT – R&D: Comtel

Policy context:

- telecommunication collective agreement determines wages;
- limited career paths in collective agreement;
- geographical mobility is regulated;

- working hours can be flexibly arranged in 'working year package' of hours;
- transferral from public to private sector: works council established;
- no social dialogue at company level.

Economic context:

- from public telecom company to private sector company;
- increased market orientation;
- increased need for geographical mobility;
- priority to marketing decisions in company decision making.

Company level

ILM/skill formation:

- formalisation of skills management, separation from HRM; skills formation now more driven by marketing department;
- external and internal retraining programmes, *e.g.* in co-operation with university;
- informal, on the job learning;
- 'subcontracting' work to hired workers on site;
- CFC early retirement arrangement for older workers.

Working time arrangements/contract:

- working year package of 207 days;
- total working hours are longer but more flexible for workers;
- increased time pressure of work;
- time-to-market based organisation of work;
- marketing drives R&D activities, including HRM and task distribution (leads to some frustration on the part of R&D planning and own task distribution);
- geographical mobility is required from workers;
- blurring of work and private time.

Work organisation and value chain restructuring:

- separation of Research from Development;
- less research, more development, stronger marketing orientation;
- R&D now works as subcontractor for company business units;
- spatial concentration of work;
- some research fields stopped.

Germany – ICT – R&D: VR2

Policy context:

- Kurzarbeit regulatory exemptions are applied (because of company economic difficulties);
- no formal representation (because of low company size);
- time (WTA) is an important issue for labour unions in industry; but this is not an important issue in IT;
- unions are company-oriented; products in the IT R&D sector are made in company networks;
- labour supply shortages.

Economic context:

- university spin-off;
- shift from research to marketing;
- high, specific and firm-related skill requirements;
- long duration of transaction building process with purchasers; high mutual investments in time, skills > high asset specificity.

Company level

ILM/skill formation:

- flat hierarchy;
- stable employment relations; permanent contracts; higher salary than at university;
- salary increases on the basis of informal management assessment;
- university and higher occupational education qualifications;
- on the job training for the company's particular software;
- the R&D workers also have marketing tasks.

Working time arrangements and contract:

- immediate availability is required in the case of emergency calls;
- but flexibility required for private life can be taken in return;
- customer demands drive WTA;
- no formal working time tracking system;
- regular working hours are maintained overall;
- weak managerial control experienced;
- informal management style.

Work organisation and value chain restructuring:

- VR1: university spin-off > bought by venture capital > venture investments withdrawn > bankruptcy > VR2;
- VR2 has two departments: software development and marketing;
- separation of university work (state of the art software) and VR2-work (stability, usability, marketing).

UK - ICT - R&D: UK LAB

Policy context:

- Japtech global R&D committee and Roadmap committee govern work and restructuring at *UK LAB*. *UK LAB* representatives in committee corporate (Japan) R&D director needs to approve plans;
- outsourcing to UK because:
 - skill, labour availability;
 - possibility to pay competitive salaries and attract skilled labour;
- locally organised employment terms and conditions, notable differences:
 - JP: stable work, non-flexible salaries and ILM;
 - UK: competition for labour in terms and conditions, less stable employment;
 - no union representation at *UK LAB*.

Economic context:

- native English speech is required in speech technology market;
- market demands being to become more important for the structuring of work than research and technological demands.

Company level

ILM/skill formation:

- individual level, fir- and task-specific knowledge is built over a period of about two years;
- little functional flexibility, because of knowledge and specialisation level; staff cannot be swapped to other technologies;
- initial qualifications: M.Sc. and Ph.D. in IT and linguistics;
- 90 *per cent* is permanently employed; 10 *per cent* contracted; sixteen employees total;
- JP: ILM > seniors leave for other business units;
- UK: ELM > labour is recruited on the basis of required skills;
- work quality is experienced as high: innovative, skill-intensive, autonomous.

Working time arrangements and contracts:

- difficult, time-consuming communication between UK and JP because of time zones;
- increasing time pressure and tightness of deadlines;
- full-time is required from permanent workers, if part-time is preferred, the labour relation becomes 'contracted';
- 27 days holiday, pension contributions by employer.

Work organisation and value chain restructuring:

- *UK LAB* is a spin-off of a university;
- bought by Japtech, who insourced additional labour power and English language skills;
- *UK LAB* outsources language specific routine work;
- product development: expansion to other European languages;
- *UK LAB* has indirect access to European market, via Japtech;
- *Japtech*: geographical expansion to European market; reintegration and redistribution of R&D work.

Norway – ICT – R&D: Comp A Technologies NOR

Policy context:

- strong differences between US (mother company) and NO (insourced company) work regulation and working conditions;
- US HR-policies: performance reviews, salaries connected to deliveries;
- NO labour regulation: 37.5 hour/week; five-week holiday; business hours 8-16 (individual flexibility is allowed); one year parental leave per child and A NOR supplements the public parental leave benefit.

Economic context:

- integration, synergy and market power of search engines is required;
- diversification of products (vertical search engines);
- by selling advertorial space in search engines, Comp A builds upon a 'value network' (created by ingenious search protocols) that is sold to third parties, who get (temporary) access;
- competition for labour with Comp B; some A NOR-employees have left for the new NO unit of Comp B.

Company level

ILM/Internal skill formation:

- experienced and newly hired employees work together in teams > learning by doing;
- recruitment: experienced engineers, M.Sc. in IT + tacit additional requirements: 'can be part of the NOR A elite';
- no relation to wider Comp A ILM;
- work with smart people, develop ideas into software, solve problems;
- the average age of the stable work force rises;
- stronger emphasis on user support and testing;
- from software development to 'Agile': six-week development, evaluation and redirection cycle; close interaction between engineers and business experts;
- Comp A needs to approve additional hiring by A NOR.

Working time arrangements and contract:

- employment is stable, low turnover;
- overtime is avoided; overseen is that holidays are actually taken;
- US HR-policies are experienced as strange and bureaucratic in NO, but faithfully implemented;
- managers in NO have intensive co-ordination about A NOR tasks with US at California working hours; developers are sheltered from this pressure;
- most employees work at normal office hours (8-16); some partly at night, not because of company requirements, but out of habit from younger days.

Work organisation and value chain restructuring:

- Comp A buys business unit of NO search engine firm. This unit, Comp A NOR, develops and sells R&D products to other Comp A-units;
- no replacement of NO work to US;
- specialisation and concentration: Comp A NOR concentrates on vertical search engine technology;
- consensus building process with Comp A on Comp A NOR tasks and roadmap;
- A NOR makes technology available to Comp A units; can be used and developed freely; units compete with each other for success in Comp A;
- strong position of A NOR in Comp A, because of quality of main product (SCOOTER).

2.5 Production in clothing

Belgium – Clothing – Production: Wonderwear production

Policy context:

- high labour costs;
- labour supply shortages;
- trade union delegates in company;
- declining number of students in dressmaking.

Economic context:

- knowledge intensity increases:
 - product variety;
 - product complexity;
- flexibility requirements increase:
 - increased speed of innovation cycle;
 - time-to-market period decreased;
 - delivery demands.

Company level:

- control over cutting quality (of models) remains in-house.

ILM/Internal skill formation:

- upskilling of production workers to model makers;
- six weeks training (compensates for lack of formal education);
- internal transfers: in Belgium shift from blue- to white-collar work force; stable total number of employment; broadening of jobs and upgrading: 'positive impact'.

Working time arrangements

Work organisation and value chain restructuring:

- prototyping in Belgium, core work: model-making and design;
- offshoring of production to Tunisia (economic context: labour supply, minimal skill level require; policy context: low wages), Hungary (economic context: labour supply, minimal skill level require; policy context: low wages and liberal economic policies) and China (economic context: production know-how available; political context: low wages and non-restrictive policies).

Italy – Clothing – Production: Green S.p.a.

Policy context:

- unions oppose Green work force reduction;
- threshold of fifteen workers for labour regulation > strong external flexibility possible below that threshold; overtime less expensive;
- centre company Green is under the clothing collective agreement; subcontractors are often below fifteen workers and in less generous handicraft collective agreement; about 20 *per cent* pay difference for similar work/qualifications;
- work-life related flexibility regulations are introduced in clothing collective agreement.

Economic context:

- increased international competition;
- demand saturation;
- diversification of consumer demand;
- increased flexibility and lower costs required;
- emerging consumer markets: market presence required.

Company level

ILM and skill formation:

- design, model-making, management and administration: overall upskilling at Green and increased functional flexibility;
- non-qualified work is outsourced to (often small, <15 employees) subcontractors;
- downskilling and monotonous work at subcontractors.

Working time arrangements and contractual arrangements:

- diversifying production;
- staff reductions at centre company; through retirement and outplacement; goal 2008: 900;
- at subcontractor: 'worker exploitation', piece-number requirements, demanding workplace, no breaks, overtime on short notice
- at Green: four hours of company-required flexible work per week; individually determined compensation

Value chain restructuring and work organisation:

- 1990: about 50/50 *per cent* of production internally and externally;
- 2006: about 6 *per cent* of production internally; 52 *per cent* outsourced in I; 42 *per cent* outsourced to HR, Serbia, SLO, RO, BG, PT, Tunisia, MEX, China;
- strong cost pressure upon subcontractors; often Green is their biggest customer > imbalanced dependency relations;
- design at Green, supply of material by Green, quality control by Green; production outsourced;
- control stringency declines > deteriorating quality image of the brand;
- outsourcing in I for high quality products: better skills and control;
- outsourcing abroad for low quality products: lower cost;
- time to delivery is important selection criterion for subcontractors.

Portugal – Clothing – Production: Tevitom

Policy context:

- tax benefits in outsourced countries and exemptions for import duties to US (20 *per cent*) in Morocco and Honduras.

Economic context:

- decreasing workflow;
- market proximity.

Company level

ILM and skill formation:

- workers have long experience in company, often ten years; knowledge related to production techniques and administration;
- upskilling and integration of functions for remaining workers;
- some software training on the job.

Working time arrangements and contractual arrangements:

- contractual status at *Tevitom* unchanged, but 75 *per cent* dismissals;
- time logging;
- working hours established: Mo-Fr 8-18; workers were not consulted;

Value chain restructuring and work organisation:

- outsourcing to RO, Morocco and Honduras; reduction of work force in PT from 150 to 12;
- redefinition of core business in PT: niches and commercial work and control of outsourced production.

Greece – Clothing – Production: Co B. Underwear

Policy context:

- union involvement in GR, union operates pragmatically;
- regulation of mass lay offs in GR;
- choice of country based to outsource work to, based on low (minimal) wage level: RO and BG.

Economic context:

- market proximity in Balkan and EU-NMS required;
- market has relatively low volatility as compared to other textile products.

Company level

ILM and skill formation:

- some job rotation and functional flexibility (knitting, stitching);
- very long tenure;
- no formalised skill development on job development of tacit skills;
- internal career up until middle management level;
- higher level management is externally recruited.

Working time arrangements and contractual arrangements:

- few overtime, regularly paid
- workers in GR consider themselves privileged and secure
- increased quality care required from work force

Value chain restructuring and work organisation:

- outsourcing of production from GR to RO (offshoring) and BG;
- no layoffs in GR; cutting and marketing remain in GR.

2.6 Production in Food

Greece – Food – Production: Co A.

Policy context:

- low wage level in BG;
- consensual approach to labour time.

Economic context:

- market proximity to Balkan and EU-NMS required;
- proximity of outsourced plant to mother company required, because of high frozen food transport costs.

Company level

ILM and skill formation:

- some job rotation, informal worker autonomy with respect to functional flexibility;
- no learning programmes for production staff;
- BG managers trained in GR.

Working time arrangements and contractual arrangements:

- no impact of VCR in GR;
- positive impact in BG: production process and labour terms and conditions lower than in GR, but higher than similar work in BG;
- harvest dictates workflow:
 - compensated overtime and hiring temporary workers in summer;
 - no worker autonomy with respect to working time.

Value chain restructuring and work organisation:

- outsourcing production (not a function, but an amount of total production; all functions) to BG;
- vertical integration: frozen pea supply integrated.

Denmark – Food – Production: Meat Inc.

Policy context:

- labour supply problems;
- co-operative ownership of factories;
- legal regulations and customer demands concerning slaughtering;
- open-ended work contracts prevail in DK; low job security regulation and high unemployment compensation ('flexicurity');
- union presence;

- collective agreement regulates terms and conditions;
- high wage levels for all workers in DK;
- contract differences between Danish and foreign workers is illegal in DK and unacceptable for unions;
- these differences are allowed in D: PL workers receive lower salaries.

Economic context:

- pig price;
- production efficiency;
- *Meat Inc.* is largest pig exporter in the world;
- global competition;
- corporate customers supervise/control production process regularly.

Company level

ILM and skill formation

- career/training path: two year industrial slaughterer; one year specialised industrial slaughterer (no pay rise, but next level is recruited from specialised slaughterers); management;
- subsidised retraining in case of redundancy;
- completely standardised work;
- lots of social initiatives, supporting social interaction, work centralisation decreased social integration;
- strong quality management.

Working time arrangements and contractual arrangements:

- working time increased from 37 to 40 hours/week;
- partly hourly, partly piece-rate wage;
- wage supplements at unusual hours;
- collective agreement allows running seven days;
- full-time is rule; individual WT-flexibility is possible in case of child care.

Value chain restructuring and work organisation:

- centralisation of production facilities;
- automation and Taylorisation;
- specialisation (separation of meat processing from slaughtering) and restructured division of labour in value chain.

Bulgaria – Food – Production: Beer AD

Policy context:

- privatisation of state-owned companies;
- consultancy bureau advised outsourcing and closing some units and introduction of HAY-system of qualifications;
- 70 per cent trade union density in company;
- daily contact management and production workers with union delegate;
- lack of impact of union involvement; workers prefer individual solutions.

Economic context:

- quality improvements in CEEC beer market;
- production technique improvements and efficiency increases;
- competition among large, multinational companies.

Company level

ILM and skill formation:

- IT and language training for management;
- technical qualifications of staff and blue-collar workers are seen as insufficient by management; workers explain this by high labour demand and comparatively low salaries at *Beer AD*;
- technical innovation in production process > increased skill requirements;
- task integration: operation and maintenance/repair of machines;
- two levels of skill requirements for blue-collar workers, lowest is no qualifications.

Working time arrangements and contractual arrangements

- seasonal employment in high season; workers supplied by agency;
- permanently employed core work force;
- less autonomy for local management since integration in B-firm;
- experienced insecurity;
- 24h/three shifts;
- salaries too low for attractiveness.

Value chain restructuring and work organisation:

- B firm buys BG breweries;
- growth of administration department; decline in production;
- some BG breweries closed, because of redundant technology;
- IT outsourced;
- production and logistics concentrated in two units;
- logistics may also be outsourced;
- decision making relocated from BG to B-HQ to RUS 'Zone'-co-ordinator.

Norway – Food – Production: The Fishing Company

Policy context:

- informal communication between management and work force;
- low union density of about 15 *per cent*;
- regular inspection over aquaculture.

Economic context:

- supply uncertainty of fish and limitations of supply;
- demand for product diversification;
- fish farming and fillet making allow different levels of standardisation and formalisation;
- consolidation and mergers in the branch.

Company level

ILM and skill formation:

- production managers recruited from fillet workers;
- fish farm employees have fifteen to twenty years of experience in the firm and strong tacit knowledge; management control is not enforced; high autonomy, which is positively valued by work force and management;
- all fish farmers need to be qualified one at job entrance or two by training during employment.

Working time arrangements and contractual arrangements:

- insourced workers got higher FC salary, but have to rotate work locations;
- extended working day for fillet makers: two shifts of six hours;
- fish farmers: flexible eight-hour days (because of specific working conditions, livestock);
- seasonal variation of workflow, fluctuations dampened after insourced fish supply company;
- seasonal work force is hired from Sweden, housing is arranged, this protects the employment of the core work force;
- apart from seasonal workers, full-time permanent jobs prevail.

Value chain restructuring and work organisation:

- new machinery (enabling stronger product diversification; requiring extended working day);
- FC insourced fish farming/ supply company ASMarine.

Germany, Eco clothing

Policy context:

- service economy.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- time pressure;
- redivision of labour.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- new HRM: customer orientation;
- self-organisation and time management;
- teamwork;

- upskilling.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- increased workload;
- social control organised through teamwork;
- community of fate in the face of market pressure.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

- outsourcing production function;
- insourcing logistics.

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Germany, Trousers company

Policy context:

- lacking skilled people.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- manufacturing;
- technological determination.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- product quality;
- diversification;
- ICT skills;
- datamanagement.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- continuous reorganisation;
- JIT;
- speed;
- social control through commitment.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

- teamwork.

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Belgium, Maltco, logistics in food industry

Policy context:

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- manufacturing and packaging;
- consumer market;
- local beer marketing.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- no social mobility;
- no appreciation for skills;
- less job complexity.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- social control through internal competition.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

- job insecurity;
- overqualification.

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Bulgaria, Kamenitza brewery, logistics

Policy context:

- post-socialism;
- privatisation.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- production;
- customer oriented.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- increased skills requirement, white- and blue-collar;
- ICT skills.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- open-end contracts;
- teamwork;
- managerial control;
- no part-time jobs.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

The Netherlands, IT in public administration

Policy context:

- post-industrialisation;
- eGovernment.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- efficiency pressure;
- service-orientation.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- continuous reorganisation;
- high complexity;
- despecialisation;
- training programs;
- interactive skills;
- ICT determinism.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- hour flexibility;
- social control via incentives;
- knowledge concentration in IT provider.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

▪ networks.

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

UK, IT in public administration

Policy context:

▪ eGovernment.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- entrepreneurial skills;
- youngsters in IT staff;
- increased administrative paper overload.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- social control through cost-drive and performance meetings;
- flex time;
- increased stress;
- breakdown of service to community.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Italy, public sector, vehicle licensing

Policy context:

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- low wages, the young are dependent mentality, no future.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- no social mobility;
- repetitive work stress;
- low satisfaction;
- communication skills.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- lack of autonomy;
- social control through ICT monitoring.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

- outsourced companies are controlled by parent group.

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Austria, Citylife, property management for council housing

Policy context:

	collective	individual
Co-ordination		
High protection	1	2
Low protection	3	4

Economic context:

- unions against freelance.

	high	low
Dependency		
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- ICT determinism;
- language skills;
- speed.

	general	specific
Substance of skills		
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- job complexity higher;
- stress higher;
- social control through teamwork and ICT monitoring.

	high	low
Responses to company		
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

- outsourcing customer service;
- 24 hours service;
- cheap call centre agents.

	high	low
Outsourcing of knowledge		
High outsourcing	1	2
Low outsourcing	3	4

Hungary, Intermed, government agency managing unemployment

Policy context:

- unemployment policy;
- labour market prognosis.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- lack of learning opportunities;
- lack of social mobility;
- higher job complexity;
- debureaucratisation;
- increased administrative workload.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- job security;
- permanent labour contracts;
- managerial control and cost-orientation.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

UK, public sector, customer services

Policy context:

- eGovernment;
- efficiency issue.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- quick learning on the job;
- adaptability;
- communication skills;
- quality of work has increased;
- multitasking.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- life pressure;
- Saturday work;
- social control through team leaders, performance control;
- open management.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Sweden, public sector, customer serves

Policy context:

- employment in rural areas, call centre creation.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- task competence;
- career paths;
- creation new jobs;
- social skills.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- very good work-life balance;
- work close to home.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Belgium, EWA, regional public agency Walloon administration

Policy context:

- eGovernment.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- data warehouse;
- interface with citizens, web portal;
- job mobility;
- speed.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- job security;
- job satisfaction;
- dissatisfaction with organisation;
- social control through legislation.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Austria, public sector, post office

Policy context:

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- post office branch;
- diversification.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- training of post office theory;
- ICT skills.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- job security (civil service).

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

The Netherlands, call centre telecom

Policy context:

- liberalisation telecom market.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- skill development;
- career development;
- flexibility;
- client satisfaction.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- social control through ICT monitoring and cost-orientation;
- part-time work.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Sweden, post office

Policy context:

- privatisation;
- eCommerce.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

- high costs of customer services.

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- commercial skill development;
- ICT skills;
- flexwork;
- downsizing.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- employs agencies

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Greece, post office

Policy context:

- diversity of employment conditions.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- work overload;
- more job complexity;
- more stress.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- social control as managerial control: task assignment;
- mismanagement;
- job insecurity at periphery;
- temp workers;
- worse employment conditions;
- understaffing problems.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4

Germany, railway services, DB Station

Policy context:

- wage negotiations.

Co-ordination	collective	individual
High protection	1	2
Low protection	3	4

Economic context:

Dependency	high	low
High market flex	1	2
Low market flex	3	4

Company level

ILM and skill formation:

- deskilling technical skills;
- upskilling social skills, service-orientations;
- emotion work;
- commercial skills.

Substance of skills	general	specific
Internal on the job	1	2
External formalised	3	4

Working time arrangement and contractual arrangement:

- job security issue.

Responses to company	high	low
Response to worker		
High	1	2
Low	3	4

Value chain restructuring and work organisation:

Outsourcing of knowledge	high	low
High outsourcing	1	2
Low outsourcing	3	4