Islands in the stream

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ISLANDS IN THE STREAM – FORANDRING OG STABILITET

DET DANSKE ARBEJDSMARKED I EN GLOBALISERET VERDEN

AF
BJARKE REFSLUND

PH.D. AFHANDLING 2014

AALBORG UNIVERSITET

ISLANDS IN THE STREAM – FORANDRING OG STABILITET

DET DANSKE ARBEJDSMARKED I EN GLOBALISERET VERDEN

af

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FORFATTEREN

Bjarke Refslund er uddannet cand.scient.pol. fra Aarhus Universitet i 2011. Siden har han været tilknyttet Institut for Statskundskab på Aalborg Universitet, først som videnskabelig assistent og efterfølgende som ph.d.-studerende. Han er tilknyttet Center for Velfærdsforskning (CCWS).

RESUMÉ

Den danske økonomi bliver i stigende grad integreret i den internationale økonomi bl.a. gennem integration af produktionen. Dette påvirker danske firmaer, arbejdsgivere og arbejdstagere og dermed den sociale model samt måden, det danske arbejdsmarked er reguleret på. Idet globaliseringen øger arbejdsgivernes fleksibilitet og samtidig øger konkurrencepresset, betyder det, at arbejdstagerne, som ikke har samme fleksibilitet, kommer under et stigende pres. Derved kommer magtbalancen, som har central betydning på det danske arbejdsmarked under pres.

Globalisering har en betydelig effekt på nationale institutioner som fx arbejdsmarkedet, men effekten er typisk indirekte gennem forskellige mekanismer som kapitalmobilitet, stigende konkurrence og arbejdsmigration. Derudover fungerer nationale forhold og institutioner medierende og som et filter på globaliseringspresset. Så resultater af globaliseringspresset er afhængigt af den institutionelle setting.

Afhandlingen belyser via fem artikler forskellige aspekter af globaliseringseffekten på især arbejdsmarkedet, men også dansk økonomi. Herunder udflytning af danske arbejdspladser, som til trods for stor offentlig bevågenhed stadig har et ganske moderat omfang. Globalisering påvirker arbejdsmarkedet gennem forskellige indirekte mekanismer, hvor den stigende internationale konkurrence samt stigende mobilitet og fleksibilitet for virksomhederne er de vigtigste. Disse pres forstærkes ofte af et generelt pres for at liberalisere arbejdsmarkeder. Men afhandlingen finder, at den potentielt største udfordring for arbejdsmarkedet kommer fra den stigende arbejdsmigration, hvor nogle arbejdsgivere forsøger at omgå det institutionaliserede arbejdsmarked ved at ansætte typisk østeuropæisk arbejdskraft på dårligere løn- og arbejdsvilkår.

Samtidig viser afhandlingen, hvordan en stærk arbejdsmarkedsorganisering kan imødekomme en række af de udfordringer, som den stigende globalisering medfører for den danske arbejdsmarkedsmodel. Der er således i høj grad en politisk dimension af, hvordan globalisering påvirker det danske arbejdsmarked.

ENGLISH SUMMARY

As the international economic integration, especially the integration of production becomes ever more encompassing the potential impact on national institutions increases. The dissertation raises the overall question, how does globalisation affect the Danish industrial relations system and the labour market in general? Economic globalisation affects firms, employers as well as workers and thus the entire social model. Globalisation tends to increase the firms' flexibility as well as global competition which in turn tend to increase the pressure on workers and organised labour that does not have the same flexibility. This challenges the power balance in the Danish labour market that is a key feature in the Danish IR-model.

The effects of globalisation are mediated through national institutions and settings, so outcomes vary across different institutional settings. The impact of globalisation on industrial relations happens indirect through various mechanisms like capital mobility, competitive pressures and labour migration.

Through five peer-reviewed articles this dissertation scrutinises different aspects of the overall research question. The Danish industrial relations (IR) are the main dependent variable, with some broader issues related to the overall economy also being touched upon, e.g. offshoring of Danish jobs, which is found to be modest at least in numerical terms. Some of the main mechanisms through, which globalisation affects IR are increasing international competition and the growing accessibility for firms to engage in the international economy. This is also reinforced by growing liberalisation pressures. But the main challenge found in the case studies is labour migration, with some employers trying to take advantage of mainly Eastern European labour migrants by employing them outside the realm of the institutionalised IR regulation, which is mainly based on voluntary collective agreements in the Danish IR-model.

The dissertation also emphasises that strong IR regulation and strong workers organisation can mitigate some of the pressures raised by globalisation. So politics still matters – especially in industrial relations.

FORORD

Denne ph.d.-afhandling er resultatet af en lang og spændende rejse, som startede (i hvert fald i universitetsregi) for snart en del år siden på statskundskab på Aarhus universitet, og som siden er fortsat på institut for statskundskab på Aalborg universitet. Det har været en fornøjelse at få lov at beskæftige sig på daglig basis med det, man synes er noget af det allermest spændende og vigtige nemlig samfundsudviklingen. Jeg har til og med fået lov at beskæftige mig med nogle af de store spørgsmål i denne afhandling, hvilket har været en fornøjelse, men også en udfordring.

Jeg skylder forskellige folk en tak i forbindelse med tilblivelsen af denne afhandling. Først og fremmest vil jeg gerne takke Jørgen Goul Andersen for et inspirerende (og til tider til hektisk) samarbejde og for i sin tid at opfordre mig til at gå den videnskabelige vej. Jørgens vejledning og støtte har været central i den faglige udvikling, jeg har gennemgået. Et ph.d.-forløb er i høj grad en rejse, og det har været yderst udviklende og lærerigt. Derudover vil jeg gerne takke mine gode kollegaer på instituttet, jeg har følt mig hjemme på Fibigerstræde 1 fra dag 1, og det har været både festligt og fornøjeligt. Det har været spændende at være en del af CCWS-miljøet men også CARMA-miljøet, selvom sidstnævnte har været på lidt mere løs basis, så har jeg haft et ben i begge forskningsmiljøer, hvilket afhandlingen her også afspejler: Der er en god del Industrial Relations i den. Flere kollegaer har taget sig tid til at læse og kommentere udkast o.l., mens andre gode kollegaer har hjulpet med mere metodiske emner. Det drejer sig om Henrik Lolle, Anette, Christian, Flemming Larsen, Emmett, Karen, Rasmus Møberg, Laust, Iben, Thomas, Henrik Plaschke samt Merete, som har hjulpet med mangt og meget. Faren ved at begynde at nævne folk er risikoen for at glemme andre, så jeg vil gerne takke alle gode kollegaer, TAP som VIP, og ikke mindst mine ph.d.-kollegaer. Sluttelig vil også takke Lane Kenworthy for et spændende ophold på University of Arizona i Tucson, samt Lars Skov Henriksen for at formidle mit ophold på Georgetown University.

Jeg håber, læseren vil finde afhandlingen både interessant og oplysende.

Bjarke Refslund, Frederiksbjerg, Århus, december 2014

INDHOLDSFORTEGNELSE

KAPITEL 1. GLOBALE PRES – LOKALE KONSEKVENSER?

Globalisering fremhæves ofte som en markant (hvis ikke den største) trussel mod både arbejdsmarkedet og velfærdsstaten – især i de nordiske lande. Det gør sig også ofte gældende indenfor samfundsforskningen, hvor billedet dog er typisk mindre pessimistisk end det, der typisk kendetegner den offentlige og ikke mindst politiske debat. Hvordan globalisering eller internationalisering[1] rent faktisk påvirker nationale institutioner som arbejdsmarkedet er ikke særlig godt belyst, så der er brug for mere empirisk viden. En række makro-komparative studier har bidraget med væsentlig indsigter, men de har en begrænset rækkevide i forhold til analyser af de konkrete effekter, globalisering kan have på nationale institutioner som arbejdsmarkedet. Relationen kommer ofte til at fremstå som en ”*black box*” eksempelvis i vurderinger af, hvad globaliseringen betyder for den ”*danske model*” især i politiske debatter og i medierne. Disse spørgsmål er ikke blot vigtige i samfundsvidenskaben, men mindst lige så meget for de politiske beslutningstagere, der skal navigere i en mere globaliseret verden.

Denne ph.d.-afhandling søger at bidrage til en mere nuanceret og detaljeret forståelse ved at rejse det overordnede spørgsmål; *Hvordan påvirker globalisering den danske arbejdsmarkedsmodel*? Dette brede spørgsmål fører til flere underspørgsmål, og forskningsdesignet har været ganske bredt, jf. nedenfor. Afhandlingens artikler afspejler behovet for at forholde sig til begge problemstillingens centrale analytiske begreber; globaliseringen og det danske arbejdsmarked.

For at forstå, hvordan globalisering påvirker arbejdsmarkedet, er det centralt at forstå, hvordan globaliseringen fungerer i dag. Derfor sigter to af

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[1] I nærværende afhandling anvendes begreberne globalisering, internationalisering og stigende international integration synonymt, uanfægtet af diverse uenighederne i litteraturen (uenighederne bliver berørt artikel II og kort i kapitel 3). Økonomisk globalisering er her defineret som stigende økonomisk interdependens og integration på tværs af nationalstater og aktører i nationalstaterne (jf. kapitel 3).

afhandlingens artikler mod at diskutere og analysere globaliseringsgrebets betydning for dansk økonomi, mens de øvrige er casestudier af, hvordan globalisering påvirker arbejdsmarkedet.

Mange akademiske analyser af sammenhængene mellem globalisering og nationale institutioner har behandlet disse på aggregerede makro-data på tværs af lande (se fx Busemeyer 2009; Glatzer og Rueschemeyer 2005; C. Jensen 2011; Meinhard og Potrafke 2012; Schmitt og Starke 2011). Disse analyser bidrager med vigtig viden om sammenhængene på tværs af lande, men samtidig efterlader de et stort behov for at komme et lag dybere ned og forstå, hvordan disse processer virker på det nationale og institutionelle niveau fx i en enkelt sektor. Ambitionen med denne afhandling er at bidrage med en historisk og kontekstuel analyse af de fænomener, der driver udviklingen i den "sorte boks", hvor globaliseringen møder de nationale institutioner[2] især arbejdsmarkedet. Ved at analysere en enkelt national case nærmere, nemlig den danske, får man navnlig et nærmere indblik i de *mekanismer*, hvorigennem globaliseringen har effekt. Dette går ofte tabt i tvær-nationale statistiske analyser af aggregerede data.

Casestudie tilgangen får derfor en central rolle i afhandlingen (se kap. 4). Samlet er ambitionen at bidrage med en vigtig brik til en bedre og mere nuanceret forståelse af, hvordan disse makrofænomener spiller sammen på lavere aggregerede niveauer: det, Merton (1968) kalder "*mid-range theory*", som beskæftiger sig med niveauaet mellem grand theory (hvor en del af de nuværende analyser befinder sig) og arbejdshypoteser (se også Hedström og Ylikoski 2010: 61–62).

Afhandlingen bidrager for det første ved at diskutere, hvordan mange analyser hænger fast i en forældet forståelse af globalisering (se kapitel 3.1 og artikel II). Der er behov for en forståelse af globalisering, som i højere grad fokuserer på, at produktionen er blevet globalt integreret, hvilket også indebærer mere nuancerede opgørelser af værditilvækst o.l. end de gængse.

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[2] Igennem afhandlingen anlægger jeg en bred analytisk tilgang til institutioner. Udover formelle eller juridiske institutioner benyttes begrebet også om uformelle (og diskursive) institutioner så som normer o.a., der er med til at definere rammerne for adfærd (fx konsensustilgangen på arbejdsmarkedet).

Her er *Global Value Chain* (GVC) tilgangen et væsentligt teoretisk og empirisk bidrag til en mere nuanceret forståelse af globaliseringen. I forlængelse heraf søger afhandlingen at bidrage med ny viden om, i hvilket omfang dansk økonomi er blevet mere internationaliseret og indgår i globale produktions kæder (GVC) fx via offshoring (på dansk udflytning) af arbejdspladser.

Endelig – og som det vigtigste – bidrager en række casestudier med viden om, hvilke konkrete mekanismer og dynamikker, der er centrale for globaliseringens påvirkning af det danske arbejdsmarked. Samlet vil afhandlingen således belyse, hvordan og i hvilket omfang dansk økonomi, danske virksomheder og især den *"danske arbejdsmarkedsmodel*" bliver påvirket af den internationale integration.

Den samlede afhandling er, så at sige, opbygget som en flerleddet antologi, baseret på et sammenhængende forskningsdesign, som bliver præsenteret her i denne opsamlende overligger, (som jeg benævner overliggeren). Selve afhandlingen består af fem videnskabelige artikler, som jeg vil referere til som artikel I-V (dog suppleret med en kort benævnelse, som fremgår i parentes herunder) for at gøre det nemmere for læseren at skille dem fra hinanden. Det drejer sig om følgende artikler:

Artikel I: Refslund, Bjarke. 2012. "Offshoring Danish jobs to Germany : regional effects and challenges to workers' organisation in the slaughterhouse industry" i *Work Organisation, Labour & Globalisation*, 6(2): 113-129. **(Artikel I - slagtericasen).**

Artikel II: Refslund, Bjarke. 2014."Globalisering og international integration af produktion – dansk økonomi i en værdikædeanalyse" i *Økonomi og Politik*, 87(2): 88-103. **(Artikel II - GVC).**

Artikel III : Refslund, Bjarke. 2014. "Intra-European labour migration and deteriorating employment relations in Danish Cleaning and Agriculture: Industrial relations under pressure from EU8/2 labour inflows?" online-first version i *Economic and Industrial Democracy*. **(Artikel III - arbejdsmigration).**

Artikel IV: Refslund, Bjarke. ”Offshoring and the domestic economy: Survey based evidence”. Submittet til *Competition & Change*. **(Artikel IV - Udflytning).**

Artikel V: Wagner, Ines og Bjarke Refslund.[3] “Understanding the Diverging Trajectories of Slaughterhouse work in Denmark and Germany: a power resource approach”.
(Artikel V - Komparativ slagtericase)

Idet formålet her i overliggeren er at binde artiklerne sammen og sætte dem ind i en teoretisk ramme, vil der ikke være et fyldestgørende referat af artiklerne. For at lette læsningen vil jeg dog her kort nævne artiklernes allermest overordnede resultater.[4]

Artikel II(GVC) og IV(udflytning) beskæftiger sig med globaliseringsbegrebet og globaliseringen af den danske økonomi. Den første artikel sætter fokus på globale værdikæder, og hvordan et GVC-perspektiv på dansk økonomi giver et mere nuanceret billede af dansk økonomi i en globaliseret verden. Artikel IV(udflytning) analyserer et centralt fænomen i den globaliserede økonomi: udflytning af arbejdspladser (offshoring). Dette bliver belyst via meget omfattende danske survey-data, som er kombineret med dansk registerdata til et omfattende data-sæt. Resultaterne viser, at udflytning af arbejdspladser påvirker den nationale økonomi, men at det overordnede omfang af udflytning stadig er forholdsvis begrænset.

Artikel I,III og IV er casestudier af, hvordan specifikke brancher bliver påvirket af stigende globalisering. Artikel I handler om slagterisektoren i Danmark, mens artikel V præsenterer et komparativt studie af udviklingen i slagterisektoren i Danmark og Tyskland. På trods af det stigende internationale konkurrencepres har den danske slagterisektor ikke oplevet større omvæltninger i arbejds- og lønforhold. Magtbalancen har dog ændret sig i takt med globaliseringen, ligesom branchen har oplevet en omfattende

[3] I arbejdet med denne artikel har de to forfattere været sidestillet og begge bidraget ligeligt.

[4] Derudover henviser jeg til selve artiklerne samt det abstrakt eller resumé, som fremgår på første side i hver af artiklerne her i overliggeren.

udflytning af danske arbejdspladser til Tyskland, England og Polen. Den komparative slagteriartikel (V) viser, hvordan forholdene i Danmark og Tyskland har udviklet sig meget forskelligt fra et stort set ens udgangspunkt. De tyske slagteriarbejdere har oplevet omfattende forringelser, og mange af jobbene i sektoren er overtaget af østeuropæiske arbejdsmigranter. I artiklen fremhæver min medforfatter og jeg forskellene i fagforeningsstyrke mellem de to sektorer som den centrale forklaring. Slutteligt analyserer den sidste artikel (III), hvordan øget arbejdsmigration påvirker arbejds- og lønforhold i rengøringsbranchen og på det ”grønne område” (land- og skovbrug, gartnerier etc.). Her forsøger nogle arbejdsgivere at benytte østeuropæiske arbejdsmigranter til at omgå det etablerede løn- og overenskomstsystem. Dette giver et pres på arbejdsmarkedsforholdene i brancherne, ligesom det skaber intern splittelse mellem arbejdsgiverne.

Et af formålene med nærværende overligger er at kæde artiklerne sammen og sætte dem ind i den rette teoretiske ramme, hvilket artikelformatet ikke giver tilstrækkelig plads til. Derfor vil jeg bruge en del plads på at redegøre for de centrale begreber og det bredere teoretiske fundament, som afhandlingens artikler hviler på, men også samtidig diskuterer disse i et kritisk perspektiv. Globalisering og arbejdsmarked er to helt centrale begreber i analyserne, hvorfor de også har en central placering her i overliggeren. Derudover inddrages også en række andre teoretiske begreber, som er relevante for artiklerne, bl.a. velfærdsstaten, liberalisering og nationale modeller. Artiklerne breder sig tematisk sig ganske vidt, men dette har været en bevidst forskningsstrategi i det samlede projekt (se kapitel 4). Derudover uddyber overliggeren nogle metodiske overvejelser, som ligger bag artiklerne, samt diskuterer kort afhandlingens data. Slutteligt diskuterer overliggeren afhandlingens samlede resultater på tværs af de fem artikler i kapitel 5.

Som Hay og Wincott (2012) argumenterer for, er vi nødt til at besvare spørgsmålet; “*hvordan påvirker globalisering nationale institutioner?*” empirisk og ikke kun teoretisk. Det er den historisk betingede nationale institutionelle konfiguration, der gør, at globaliseringspresset udmønter sig på forskellig vis, så outcomet bliver afhængigt af den nationale institutionelle setting (Campbell 2004; Crouch 2005; Esping-Andersen 1996; Hall og Taylor 1996; Hay 2004, 2006), men også strukturelle forhold som erhvervs- og industristruktur har betydning. Det betyder også, som påpeget af bl.a. Streeck (2010a: 6), at vi er nødt til at forstå samfundet og dets institutioner i en historisk kontekst, hvorfor en mere kontekst-orienteret tilgang er relevant (se den uddybende diskussion i kapitel 4).

Samlet argumenterer afhandlingen for, at der opstår en række pres på det danske arbejdsmarked i takt med den stigende internationale økonomiske integration, som især giver anledning til forandringer i magtbalancen på arbejdsmarkedet. Dette skal ikke forstås sådan, at de nationale systemer nødvendigvis konvergerer, idet forskelle i nationale institutioner gør, at der bliver forskellige outcomes. Dermed er der også et handlerum for nationale aktører som virksomheder, arbejdsgivere og ikke mindst arbejdstagere. Men de nationale politiske svar er på ingen måde givet på forhånd, så der er løbende politisk uenighed over udformningen af disse.

Selve overliggeren er opbygget således, at jeg først udfolder problemstillingen yderligere samt præsenterer nogle overordnede teoretiske overvejelser, inden kapitel 2 og 3 præsenterer og diskuterer de centrale begreber og mekanismer, som danner afhandlingens samlede ramme. Først diskuteres i kapitel 2 begrebet *“den danske model”*, som generelt er afhandlingens undersøgelsesobjekt og afhængige variabel (om end den også har en medierende effekt). Hvad forstås der ved den danske model, og hvorvidt giver det stadig mening at diskutere en samlet dansk model? Herefter identificerer kapitel 3 de centrale udfordringer, som den internationale integration kan medføre, og de mekanismer der overfører disse mere overordnede tendenser til konkrete udfordringer. Herefter præsenteres i kapitel 4 den samlede afhandlings forskningsdesign, ligesom de metodiske og videnskabsteoretisk overvejelser, der ligger bag artiklerne diskuteres, herunder case udvælgelsen. Dernæst følger kapitel 5, hvor afhandlingens samlede resultater diskuteres. Slutteligt konkluderes der i kapitel 6.

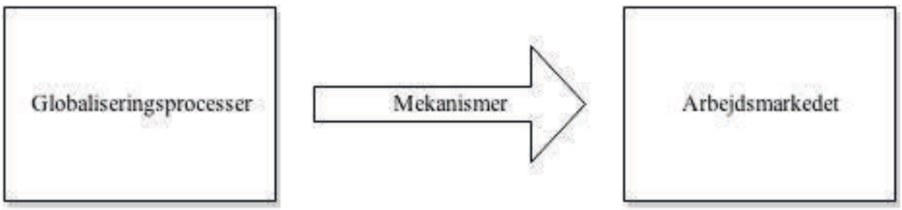
1.1. AFHANDLINGENS PROBLEMSTILLING

Som sagt kan problemstillingen for dette ph.d.-projekt koges ned til; *Hvilken betydning har globalisering for det danske arbejdsmarked*? Jeg vil her udfolde problemstillingen, som har været styrende for artiklerne, yderligere.

Når det gælder globaliseringsbegrebet, er spørgsmålet, om den hidtidige forståelse af globalisering er tilstrækkelig til at forstå de igangværende forandringer i den internationale økonomi. Argumentet er, at forståelsen af globaliseringsbegrebet ofte er for uklar, og at mange diskussioner og facetter af den samtidige globalisering er dårligt belyste. For at være i stand til at analysere samspillet mellem globalisering og arbejdsmarkedet kræves en nærmere diskussion af, hvad globalisering er, og hvordan den udfolder sig i en dansk kontekst. Dette bliver primært behandlet i artikel II(GVC), hvor dansk økonomi og globalisering belyses i et GVC-perspektiv, som baner vejen for en anderledes, men mere kohærent forståelse af den nuværende globalisering. Derudover omhandler artikel IV et centralt og stadig vigtigere fænomen, nemlig udflytning af arbejdspladser. Derudover behandles globaliseringen også i overliggerens kapitel 3.1 og i Refslund og Goul Andersen 2014.

Forskningsspørgsmålet fremgår af figur 1, og rejser to overordnede underspørgsmål, hvor det første består af at identificere mekanismerne i figur 1, og det andet af at afdække konsekvenserne for arbejdsmarkedet.

Figur 1: Forskningsspørgsmål



Det er ofte uklart i analyser af globaliseringstendenser og de forandringer af arbejdsmarkeder og velfærdsstaten, der potentielt følger heraf, hvilke konkrete mekanismer eller processer der medfører forandringerne. Globalisering fremstår derfor i værste fald som et omnipotent fænomen. Derfor diskuterer kapitel 3 gennem hvilke mekanismer, globaliseringsprocesserne kan påvirke arbejdsmarkedet. Mekanismer er her forstået, som de (mere eller mindre komplekse) kausale processer eller sammenhænge, hvorigennem globalisering (som *X* i analysen) har effekt på nationale institutioner (*Y* i analysen), som rækker udover den umiddelbare korrelation mellem begreberne; et eksempel er kapitalmobiliteten og de effekten, det medfører (se Elster (1989), Hedström og Ylikoski (2010) og Tilly (2001) for en diskussion af kausalmekanismer samt Gerring (2010) for en kritisk diskussion).[5]

Globaliseringsprocessernes effekt på arbejdsmarkedet er gennem en række forskellige mekanismer og tendenser, hvor kapitel 3 vil diskutere de mest centrale mekanismer: kapital-mobilitet, international priskonkurrence samt arbejdsmigration. Derudover afgrænses analysen til nogle mere specifikke problemstillinger: arbejdsmigration (jf. artikel III), offshoring/udflytning (jf. artikel IV) samt udviklingen indenfor enkelt sektorer; slagterisektoren (som er behandlet i artikel I og V samt i Refslund 2013) samt rengøring og det såkaldte ”grønne område” (artikel III). Som tidligere nævnt er projektets forskningsstrategi at gå i dybden med enkelte områder frem for at behandle et større antal cases. Målsætningen er gennem casestudierne at bidrage med ny indsigt i, hvordan globaliseringen påvirker arbejdsmarkedet. Disse nuancer går ofte tabt i tvær-nationale og makro-orienterede analyser.

Afhandlingen spreder sig over flere brede, men vigtige tematikker, derfor har en række afgrænsninger været væsentlige. Afhandlingen har som allerede nævnt været afgrænset til udvalgte sektorer og mekanismer (bl.a. arbejdsmigration og udflytning af arbejdspladser). De udvalgte sektorer involverer flere af de mest centrale tendenser, såsom liberalisering, kapital-mobilitet og arbejdsmigration.

En anden central afgrænsning er afhandlingens analyseobjekt. Analysen er som nævnt todelt. Hvor den første kortere del er koncentreret om globalisering, fokuserer den anden del af analysespørgsmålet på, hvordan globalisering påvirker den ”*danske model*”. Dette er endnu et bredt begreb, her forstået som det danske arbejdsmarked og reguleringen deraf. I overliggerens kapitel 2 vil jeg definere og diskutere det nærmere. Argumentet her er, at arbejdsmarkedet er en integreret del af det samlede

[5] En anden term kunne være mellemkommende variable, men mekanisme-termen afspejler, at det ofte er mere komplekse sammenhænge med flere led (Hedström og Ylikoski 2010).

system, hvorfor det ikke kan analyseres fuldstændigt uafhængigt af andre institutioner (Dølvik og Martin 2015b; Hollingsworth og Boyer 1997a; Streeck og Crouch 1997). Jeg anvender derfor begrebet den sociale model (jf. Dølvik og Martin 2015a). I det overordnede forskningsspørgsmål er arbejdsmarkedet dog den afhængige variabel.

Imidlertid er arbejdsmarkedet (og andre nationale institutioner) ikke en alene en afhængig variabel. Det er også en medierende variabel, som har betydning for, hvordan globalisering påvirker det danske samfund, (som påpeget af bl.a. Campbell 2004; Hay 2004, 2006; Hull Kristensen og Lilja 2011).

1.2. GLOBALISERING, KAPITALISME, INSTITUTIONER OG LIBERALISERING

Capitalism (..) not only never is but never can be stationary

Schumpeter 1942: 82

Afhandlingen trækker på en række forskellige teorier, som på forskellig vis bidrager til at belyse problemstillingen. Grundet det brede forskningsdesign kommer det teoretiske fundament også til at være ganske omfattende. Kapitel 2 og 3 præsenterer og udfolder de teoretiske positioner mere detaljeret, hvilket artikelformatet ikke giver tilstrækkelig plads til. Samtidig tjener de to kapitler som et overblik over det relevante teoretiske landskab (et state-of-the-art overblik). Kapitel 2 identificerer og diskuterer de centrale institutioner i den danske arbejdsmarkedsmodel (Due, Madsen og Jensen 1993), men også den bredere velfærdsmodel. Som nævnt anlægger jeg et”social model”-perspektiv, hvor arbejdsmarkedsreguleringen, sammen med velfærdsstaten og uddannelsessystemet udgør den samlede sociale model (Dølvik og Martin 2015b). Herefter diskuterer kapital 3 først globaliseringen, hvor jeg inddrager et Global Value Chain perspektiv (Bair 2009; Gereffi 2014; Gereffi og Korzeniewicz 1994; Huws et al. 2009), som ligger stor vægt på, hvordan produktionen bliver stadig mere integreret, hvilket også har været et gennemgående tema i artiklerne. Herefter identificerer og diskuterer resten af kapitel 3 de centrale mekanismer, som medfører forskellige pres på den danske model.

Her skal indledes med nogle teoretiske noter, som, udover de mere konkrete teoretiske elementer i kapitel 2 og kapitel 3, har været styrende for afhandlingen, især i artiklerne I(slagteri), III(arbejdsmigranter) og V(komparativ slagteri). I analyser af globaliseringens påvirkning af nationale institutioner kan der (noget karikeret, det er snarere et kontinuum) sondres mellem to teoretiske positioner: en første, hvor globalisering har en kraftig transformativ effekt, som eksempelvis liberaliseringslitteraturen, hvor kapitalismen, (som globalisering ses som et udtryk for), i høj grad påvirker alle nationale institutioner (Baccaro og Howell 2011), hvilket deler mange træk med den tidlige hyper-globaliseringsteori (Gray 1998; Ohmae 1991). På den anden side en institutionel funderet litteratur, hvor globalisering har mere begrænset betydning, fordi de nationale institutioner afbøder globaliseringspresset (Brady, Beckfield og Seeleib-Kaiser 2005; Kim og Zurlo 2009; Pierson 1998: 539–41; Swank 2002). Disse teoretiske positioner har ganske givet begge en vigtig pointe.

Afhandlingen deler således liberaliseringsteoriens betragtning, at man, indenfor komparativ politisk økonomi, i højere grad bør analysere og betone de samlende tendenser i kapitalismen (som globalisering kan se som en udtryksform for) (Streeck 2010b, 2011), men uden at afskrive institutioners afbødende og differentierende effekter. Streeck fastholder således et institutionelt fokus, men argumenterer for, at vi er nødt til at analysere institutionelle forandringer som en del af en bredere teori om kapitalisme – ikke blot som institutionel forandring per se (Streeck 2009: 3, 12–13). Vi bør derfor analysere udviklingen i de enkelte lande, fordi de er unikke historiske konstellationer af den kapitalistiske sociale orden (Streeck 2010a). Afhandlingen ligger sig i dette mere overordnede spørgsmål tæt på Streecks position, (som kan kaldes institutionel politisk økonomi)[6], og

[6] Som derved adskiller sig fra de tre klassiske institutionelle tilgange; rational choice institutionalisme, sociologisk institutionalisme samt historisk institutionalisme (se Hall og

anlægger et institutionelt perspektiv, hvor nationale institutioner påvirker og medierer globaliseringspresset (Campbell 2004), men hvor dette globaliseringspres er et kapitalistisk system-betinget pres (jf. Streeck).

Heraf følger, at to elementer er centrale i analysen; for det første den konkrete historiske konfiguration af velfærdsstaten og arbejdsmarkedet (i linje med Korpi og Esping-Andersens argument), og for det andet den konstante, dynamiske tilpasning og kapitalistisk udvikling indenfor en institutionel ramme, som betonet af Polanyi (1944). Herved følger afhandlingen traditionen fra Marx og Polanyi og videreført af Streeck (2009, 2010b, 2011; Streeck og Thelen 2005a), hvor modsætningsforhold, (som hos Polanyi (1944) er mellem institutioner og kapitalisme), giver en dynamisk samfundsudvikling. Som Marx (1997[1848]) skrev i det kommunistiske manifest ”*All that is solid melts into the air…*”, hvilket er videreført i senere politisk-økonomiske analyser (for en klassisk belysning af kapitalismens konstante bevægelse se Berman 1983). Resultatet af denne dynamiske udvikling er ikke givet på forhånd, men er et resultat af vedvarende politisk konflikt om institutionernes design (Korpi 1978, 1983; Polanyi 1944), hvilket samlet betyder at; *”Politics matters”.*

Denne afhandling placerer sig således indenfor en ”political economy” (politisk-økonomiske) tradition, hvor sammenhængen mellem økonomi og samfundets organisering er helt central (Streeck 2011), eller formuleret på en anden måde: den parallelle eksistens af stat og marked er central (Gilpin 1987).[7] Hos klassiske teoretikere som Smith og Marx var de to begreber ikke noget der kunne – eller skulle – analyseres uafhængigt. Økonomiske interesser påvirker det politiske rum og samfundets generelle organisering. Samspillet mellem økonomi og politik er ikke en økonomisk, deterministisk lov, men i høj grad et dynamisk fænomen, som både er rammen om, men samtidig også strukturerer, de social interaktioner (jf. Giddens 1984). Denne afhandling og artiklerne har i forlængelse af den politisk-økonomiske

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Taylor 1996) samt mere kapitalisme-kritiske tilgange som marxistisk institutionalisme (Vidal 2014).

[7] For en oversigt over udviklingen af den komparative politisk-økonomiske forskning se (Streeck 2010a).

tradition fokus på sammenhængen mellem økonomiske (globalisering) og politiske fænomener (som institutioner).

Disse teoretiske noter skal ses som et teoretisk styringsredskab for afhandlingen, som har dannet en overordnet ramme for analyserne. Jeg vil nu i kapitel 2 definere og diskutere analyseobjekt i afhandlingen; den danske arbejdsmarkedsmodel, ligesom jeg vil placere den indenfor det bredere nordiske velfærdsregime.

KAPITEL 2. "DEN DANSKE MODEL"

Thi hvad kan tænkes, siges eller skrives, i hvilket teorier ikke kives?- Med teori skal teori fordrives.

Piet Hein

Begrebet "*den danske model*" blev oprindeligt brugt til at beskrive det danske arbejdsmarkeds organisering (Due et al. 1993), og begrebet er blevet hvermandseje hos politikere og ikke mindst arbejdsmarkedets parter selv. Alligevel fremtræder det analytisk noget uklart og har afledt en del diskussion (se fx Borchorst, Caraker og Jørgensen 2012), ligesom det efterhånden også er uklart, om det udelukkende refererer til arbejdsmarkedet eller til den bredere samfunds- og velfærdsmodel. Jeg vil her følge Due og Madsens klassiske anvendelse (til trods for ovenstående diskussion), således refererer begrebet til arbejdsmarkedets regulering og de institutioner, der sætter rammerne for dette.

Analyseobjektet (eller den afhængige variabel om man vil) i afhandlingen er den "danske model", hvorfor det er relevant at diskutere og præsentere begrebet nærmere, samt få det placeret i den bredere institutionelle kontekst. Artiklerne fokuserer primært på påvirkning af selve arbejdsmarkedet, men den bredere social model er relevant at inddrage, fordi jeg i en politisk-økonomisk forskningstradition lægger vægt på det samspil, der er mellem forandringer i fx arbejdsmarkedet og forandringer i den sociale model. Arbejdsmarkedet kan ikke forstås uafhængigt af den samfundskontekst og historiske kontekst, som det udgør en vigtig del af. Derfor vil jeg også referere til den bredere "social model" (jf. Dølvik og Martin 2015b).

Arbejdsmarkedsreguleringen udgør sammen med "social policy" (her tolket lidt bredere som velfærdsstaten) samt uddannelsessystemet den "sociale model" (Dølvik og Martin 2015: 4-5). Andre igen definerer sociale systemer endnu bredere fx Hollingsworth og Boyer (1997b: 2–3), som taler om "*det sociale produktionssystem*", hvor regler, lovgivning, finanssystemet, kulturelle aspekter samt staten også inddrages i definitionen. Jeg følger

Dølvik og Martins definition af sociale modeller igennem overliggeren. De forskellige dimensioner hænger sammen og skaber en kompleks social konfiguration. Det er på linje med Streecks argument om, at enhver samfundskonfiguration er et udtryk for en bestemt social formation, som er betinget af den historiske kontekst.

Grunden til, at det er nyttigt at inddrage et bredere perspektiv, er, at arbejdsmarkedet er indlejret i selve den overordnede samfundsorganisering, på samme måde som selve markedet eller de økonomiske systemer er "*embedded*" (indlejret) i staten eller samfundets sociale strukturer (Durkheim 1893; Granovetter 1985; Polanyi 1944). Uden institutioner er der ikke et marked. Schumpeter (1942: 417) udtrykker det således:

> *"No social system can work which is based exclusively upon a network of free contracts between (legally) equal contracting parties and in which everyone is supposed to be guided by nothing except his own (short-run) utilitarian ends".*

Derudover er den bredere tilgang relevant, fordi forandringer i den ene sfære kan have direkte og stor betydning i andre sfærer. Den tyske udvikling i de seneste ti år viser, hvordan policy forandringer og forandringer i arbejdsmarkedet har medført store omvæltninger i den sociale model (Eichhorst 2014; Holst 2014). I velfærdsstaten har ydelsesniveauer som dagpenge og lønninger en direkte og afsmittende effekt på hinanden. Bliver lønningerne så lave, at det ikke kan betale sig at tage et arbejde grundet dagpengeniveauet, bliver dette et politisk problem. Det viser den seneste tids diskussion af ydelser med alt tydelighed.

Først diskuterer jeg Danmark, som en del af den nordiske velfærds-klynge (afsnit 2.1), hvorefter jeg mere specifikt ser på den danske arbejdsmarkedsmodel, som er central i afhandlingen (afsnit 2.2). Derefter ser jeg i afsnit 2.3 nærmere på, hvordan samfundsmodeller kan være et centralt element af konkurrenceevnen, og hvordan den danske model har en række styrker bl.a. stor omstillingsparathed.

2.1. DEN NORDISKE SOCIALDEMOKRATISKE MODEL

I Esping-Andersens klassiske værk om velfærdstypologier; "*The Three Worlds of Welfare Capitalism*" fra 1990 beskriver han tre forskellige typer af velfærdsstater, som han kalder for regimer, fordi det netop afspejler den komplekse regulering mellem staten og markedet. En af disse regimetyper, som dækker de nordiske lande, kalder Esping-Andersen den socialdemokratiske. Andre velfærds-typologier ender ofte ud med en tilsvarende konklusion, hvor Danmark bliver grupperet sammen med de øvrige nordiske lande (Amable 2003; Coates 2005; Hay 2004; Hay og Wincott 2012; Whitley 1999).

Andre typologier som Varieties of Capitalism (VoC) tilgangen (Hall og Soskice 2001) har ikke en særskilt nordisk dimension, men som det vil bliver argumentet for herunder, og som især artikel IV(komparativ slagtericase) også påpeger, er det en svaghed ved VoC-tilgangen. Især i lyset af udviklingen i tysk politisk økonomi fremstår VoC-tilgangen analytisk svag. Et andet centralt kritikpunkt af VoC-tilgangen i afhandlingen, er det manglende fokus på magtforholdet mellem arbejdstagere og arbejdsgivere, som bliver fuldstændig overskygget af virksomhedernes rolle.[8]

En ganske omfattende litteratur diskuterer hvorvidt, man stadig kan tale om en nordisk model, og hvad der adskiller den fra andre modeller (se fx Kvist et al. 2012; Kangas og Palme 2005; Ryner 2007; Kvist og Greve 2011; Calmfors 2014). Overordnet er konklusionen dog at, Danmark, Sverige og Norge, men også i stigende grad Finland og Island på trods af diverse forandringspres, har en lang række fællestræk, der gør, at det stadig er berettiget at tale om en nordisk model (se fx Vis og Kersbergen 2014).

De små, åbne nordiske økonomier deler fællestræk både i forhold til velfærdsstaten, som påpeget af Esping-Andersen (Hay og Wincott 2012),

[8] Andre kritikpunkter af VoC-tilgangen er den metodiske nationalisme, hvor lande ses som enhedsaktører samt, at tilgangen er funktionalistisk og har et statisk aktørperspektiv, hvor historie, konflikter og forandringer er sekundære se bl.a. (Streeck 2010a), ligesom arbejdsgiverinteresser behandles heterogent på nationalt niveau og sektorniveau.

men også på arbejdsmarkedet (Andersen, Dølvik og Ibsen 2014; Crouch 2012). Derudover er de nordiske lande også kendetegnet ved meget høj social tillid (Larsen 2013) samt en lavere grad af ulighed (Calmfors 2014). Det er vigtig at huske, at velfærdstypologierne hos Esping-Andersen er weberianske idealtyper, hvor målet er at indfange de essentielle træk, og der eksisterer således ikke nogen "rene" velfærdsstater ud fra typologien (Esping-Andersen 1990: 28). Dette afsnit ser kort nærmere på den danske (og nordiske) social- og velfærdsmodel og de centrale elementer i Esping-Andersens typologi, hvorefter afsnit 2.2 ser mere specifikt på arbejdsmarkedet, som udgør et central element i modellen (Andersen et al. 2014).

Balancen mellem stat og marked står centralt i Esping-Andersens oprindelige model, mens han i en senere version (Esping-Andersen 1999) også inkluderede kønsaspekter via familien efter en bred kritik for at overse kønsspørgsmål. De centrale elementer i de nordiske lande er generøse velfærdsydelser og universelle rettigheder fx lige adgang til uddannelse og sundhedsvæsen kombineret med en stor offentlig sektor, samt en stærk stat (Dølvik 2013b). Dette giver en høj grad af de-kommodificering af arbejdskraften, hvilket er en central forskel mellem de tre regimer. De-kommodeficering er et udtryk for, i hvilken udstrækning arbejdskraften er afhængig af arbejdsmarkedsstatussen, altså hvor de-kommodeficeret (eller ikke-vareliggjort) arbejdskraften er (Esping-Andersen 1990:22). Herved trækker Esping-Andersen på en lang tradition fra Marx og Polanyi, hvor arbejdskraften ses som en falsk vare (*fictious commodity* hos Polanyi 1944: 71).

I de nordiske lande har fagbevægelsens styrke haft central betydning for udviklingen af de-kommodificerende institutioner (Dølvik 2013b; Esping-Andersen 1980, 1985; Esping-Andersen og Korpi 1984; Korpi 1978, 1983), hvilket også er en af grundene til, at Esping-Andersen bruger en politisk term for den nordiske model; den socialdemokratiske. Den organisatorisk, politiske og institutionel magt, som de nordiske socialdemokratier og ikke mindst den organiserede arbejderbevægelse historisk har haft især i mellemkrigstiden og i velfærdsstatens gyldne alder, har haft en central betydning for udviklingen af de nordiske velfærdsstater. Dertil kommer organiseringen af arbejdsmarkedet, hvor de nordiske fagforeninger også har haft en helt central placering, (det bliver diskuteret herunder i 2.2). Esping-Andersens empiriske mål for dekommodificering har været udsat for en del kritik (se især Scruggs og Allan 2006, 2008), ligesom analysen er blevet kritiseret for at basere sig på den industrielle klassestruktur i perioden, der senere er blevet opfattet som velfærdsstatens "gyldne alder" (Pierson 1994). Men på trods af kritikken så har typologien og analysen af de-kommodificeringen af arbejdskraften i de nordiske lande stadig stor relevans i dag (Crouch 2014a; Hay og Wincott 2012), hvilket resultaterne i denne afhandling også peger på.

Andre betoner mere dynamiske elementer af de nordiske modeller, som tilpasningsevne, innovative systemer, social mobilitet samt decentrale strukturer (Hull Kristensen 2013; Hull Kristensen og Lilja 2011; Vartiainen 2014). Dette bør ikke ses som en modsætning til Esping-Andersen og Korpis mere strukturelle og magtresursebaserede model, men snarere som en forlængelse. Det er en række særtræk herunder de-kommodificeringen, som er med til at sikre modelens omstillingsparathed og tilpasningsevne.

Andre teoretikere igen har i højere grad peget på kulturelle forklaringer samt småstatsstatussen og etnisk homogenitet som forklaring på den danske sociale models særtræk (Campbell og Hall 2009; Campbell, Hall og Pedersen 2006). Dette har ganske givet også en relevans i forhold til analyser af den danske velfærdsstats udvikling, men i denne afhandling ligger vægten på de strukturelle og klasse-betingede magtresurse teorier.

Samlet danner Esping-Andersens teoretiske tilgang en yderst anvendelig heuristisk ramme for analyserne i denne afhandling. Især vægten på magtresurser samt den politiske kamp, om hvordan økonomien skal styres, og samfundet indrettes, er central i afhandlingen og i artiklerne. Dertil kommer, at de nordiske lande i vid udstrækning har en række fællestræk herunder ikke mindst på arbejdsmarkedet. Analyserne har i udgangspunktet kun beskæftiget sig med Danmark, men der kan i flere tilfælde drages relevante sammenligner og paralleller med de øvrige nordiske lande.

2.2. ARBEJDSMARKEDETS CENTRALE PLACERING

Arbejdsmarkedet udgør en central del af de sociale modeller. Diversiteten i arbejdsmarkedssystemer fremstår typisk meget klare, fordi nationale reguleringsformer ofte er meget stærkt betinget af den historiske udvikling og således meget bundet til nationale institutioner (Crouch 1993, 2012; Hollingsworth og Boyer 1997b:2–3; Hyman 2004; Visser 2005). Som Hyman (2004:274) udtrykker det;

> *"Industrial relations systems became consolidated in the past century on a national basis. Each acquired unique characteristics, reflecting nationally distinctive economic structures, political traditions, and social practices."*

Således adskiller arbejdsmarkeder sig typisk ved graden af regulering og statslige og juridisk regulering, fagforeningsmedlemskab, fagforeningsstrukturen, arbejdsgiverorganisering, overenskomstsystemer osv.

Arbejdsmarkedet og reguleringen deraf, (ofte kaldet industrial relations (IR) inden for traditionen),[9] er således en central national konfiguration. Arbejdsmarkedet og styrkeforholdet på arbejdsmarkedet har generelt haft meget stor betydning for samfundsudviklingen i de nordiske lande (Andersen et al. 2014; Dølvik 2013b; Esping-Andersen 1985; Korpi 1978), ligesom det har en central rolle i afhandlingen.

Den danske model adskiller sig på en række områder fra andre arbejdsmarkedsmodeller (Due et al. 1993). Modellen har en række fællestræk med de øvrige nordiske lande[10], men her skal jeg især fremhæve de danske særtræk, som er vigtige i forhold til analyserne i afhandling og ikke mindst i artikel I og V(slagtericasen) samt artikel III(arbejdsmigration).

Udgangspunktet for den danske arbejdsmarkedsmodel har været en stærk regulering mellem i udgangspunktet ligeværdige parter (Andersen et al.

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[9] Jeg bruger arbejdsmarkedsmodel og IR/IR-system synonymt her i overliggeren uanfægtet af nuancerne mellem de to begreber.

[10] Se Andersen et al. (2014) for en gennemgang af de nordiske arbejdsmarkeder.

2014). Arbejdsmarkedets parter har spillet en markant rolle i samfundets udvikling, hvilket har været baseret på komparativt unikt høje medlemsgrader især af de faglige organisationer, men også en solid arbejdsgiverorganisering. Historisk kan arbejdsmarkedsmodellen siges at være et centralt grundlag for det såkaldte institutionaliserede klassekompromis eller den demokratiske klassekamp (Dølvik 2013b; Esping-Andersen 1985; Esping-Andersen og Korpi 1984; Korpi 1978, 1983). Fagforeningsmedlemsgraderne er stadig unikke i de nordiske lande, hvor en af oftest fremhævede årsager har været bibeholdelsen af det såkaldte Gent-system (Lind 2009), om end de historiske forklaringer givet vis er mere kompliceret end det.[11] Medlemsgraden i Danmark ligger i dag omkring de 67 % (Ibsen, Høgedahl og Scheuer 2012: 77).

Fagforeningernes stærke position, som følge af de høje medlemsgrader, har medført en meget omfattende og inkluderende overenskomstdækning. I dag er 74 % af alle lønmodtagere i den private sektor overenskomstdækkede, mens stort set alle offentlig ansatte har overenskomst, hvilket giver en samlet dækningsgrad på 84 % i 2013 (DA 2014). Dette er som sådan ikke unikt i forhold til mange andre lande, men intensiteten og omfanget af resultaterne fra overenskomstforhandlinger er alligevel meget anderledes fra lande, som på papiret har samme høj overenskomstdækning men slet ikke den samme tyngde i overenskomstforhandlingerne (Crouch 2012).

Fra omkring midten af 1980'erne er der sket en såkaldt "centraliseret decentralisering" (Due et al. 1993), hvor der er blevet væsentlig mere handlerum til lokale forhandlinger, men dog stadig med en kraftig central styring. Parterne var overordnet relativt enige om, at det var nødvendigt at tilpasse lønforhandlingssystemet til de nye internationale vilkår i kølvandet på oliekrisen og høj inflation, hvorfor udviklingen blev beskrevet som "centraliseret decentralisering", hvor der stadig er signifikant central styring i modellen (Due et al. 1993; Vartiainen 2014: 11–12). En central

[11] Fx at fagbevægelsen i Norden har været en enhedsfagbevægelse uden voldsomme interne politiske konflikter, som har kunnet splitte fagbevægesen, om end den svenske fagbevægelse rent faktisk oplevede mere splittelse med en kommunistisk og senere syndikalistisk bevægelse i det primært finsk-talende Nordsverige, men ikke nok til at udgøre en reel trussel mod den samlede fagbevægelse (Esping-Andersen 1980:122).

bevægegrund for decentraliseringen, som især var drevet af arbejdsgiverne med skabelsen af et dominerende Dansk Industri, var at sikre industrien en central rolle som ”*key bargaining*” sektor, hvor de øvrige brancher følger forhandlingsoplægget fra industrien (Pedersen og Andersen 2014: 44, 49). Denne type forhandlinger, hvor de eksporterende sektorer er toneangivende, bliver ofte fremhævet som meget tilpasningsdygtige, fordi den hurtigt tilpasser sig forandringer i den internationale konkurrence (Traxler og Brandl 2012; Dølvik et al. 2015).

Til trods for decentraliseringen er der stadig et markant element af central styring i overenskomstsystemet, og overenskomstdækningen er stadig ganske omfattende, ligesom en hel del forhold stadig fastsættes centralt, hvilket i øvrigt også er billedet i de øvrige nordiske lande (Vartiainen 2011). Sektororganisationerne især industriens har stadig stor indflydelse. Dette er modsat den europæiske tendens, som går mod stadig færre kollektive overenskomstforhandlinger på tværs af flere arbejdsgivere og mod stigende virksomhedsforhandlinger, hvilket ofte bliver sidestillet med en svækkelse af fagforeningerne (Marginson 2014).

Det danske arbejdsmarked er uanfægtet af det korpianske udgangspunkt ofte blevet beskrevet som konsensuelt (Galenson 1952). Også i sammenligninger med det svenske arbejdsmarked har klassekonflikter haft en mindre central rolle, bl.a. pga. klassestrukturen med et større småborgerskab og et større husmandssegment (Esping-Andersen 1980). I senere analyser er det beskrevet som konfliktbaseret konsensus (Jensen 2007). En grundsten i den danske model er September-forliget fra 1899, som nærmest har grundlovs-status på arbejdsmarkedet, og meget arbejdsmarkedsregulering tilbage til September-forliget. Her anerkendte arbejdsmarkedets parter hinandens berettigelse og deres konfliktende interesser samt fredsforpligtelsen (Due et al. 1993). Fredsforpligtelsen har betydet, at tabte arbejdsdage har været meget koncentreret omkring storkonflikter i de senere år, hvor der var storkonflikt i 1998, 2008 og primært på skoleområdet i 2013. Disse meget store antal tabte arbejdsdage på enkelte år betyder, at det danske tab af arbejdsdage ligger i top i nordiske sammenligninger (Pedersen og Andersen 2014: 53–54).

Staten spiller en vigtig rolle i reguleringen af arbejdsmarkeder. Staten spiller også en vigtig rolle i den danske model ved, at staten i meget vid udstrækning overlader arbejdsmarkedsreguleringen til parterne selv (Andersen et al. 2014). Dette har givet arbejdsmarkedets parter en central rolle, og det danske arbejdsmarked er kendetegnet ved en høj grad af selvregulering primært via overenskomsterne, hvor statens rolle er meget tilbagetrukket (Kristiansen 2013; Andersen et al. 2014; Due et al. 1993).

Den høje organiseringsgrad og de kollektive løsninger har betydet, at lønspredningen generelt har været lav, og især lavt uddannede har fået en relativ høj løn. Det kunne teoretisk set give et trade-off mellem høje lønninger og beskæftigelse, men flere forskningsresultater viser, at der ikke er nogen modsætning mellem høj løn for lavt uddannede og deres beskæftigelsesgrad – i hvert fald ikke i de nordiske lande (Barth og Moene 2012; Goul Andersen 2007; Kenworthy 2003; Salverda og Mayhew 2009).

Den danske arbejdsmarkedsmodel står overfor en række udfordringer: faldende medlemsgrader, men også fremkomsten af såkaldte "gule" eller alternative fagforeninger (Ibsen, Høgedahl og Scheuer 2013; Høgedahl 2014a) og politisk udfordringer for aftalemodellen (Klitgaard og Nørgaard 2014). Men disse udfordringer til trods, kan man stadig samlet tale om en særlig dansk (og også en nordisk) arbejdsmarkedsmodel (Andersen et al. 2014; Crouch 2012; Due og Madsen 2008; Kristiansen 2013), hvor kendetegnene er høje fagforeningsmedlemsgrader, ligeværdige og stærk arbejdsmarkedsparter, konsensual dialog (om end baseret på konfliktuelle interesser), lav lønspredning samt høj grad af overenskomstdækning. Dertil kommer den særlige flexicurity-model, som næste afsnit kort redegør for.

Men som påpeget i afhandlingen, medfører globalisering også en række udfordringer for arbejdsmarkedet ikke mindst for den centrale magtbalance. Især brugen af underbetalte arbejdsmigranter i særlig udsatte sektorer (Artikel III), men også relokalisering af danske arbejdspladser (artikel IV-udflytning; Refslund og Goul Andersen 2014) kan have stor betydning for arbejdsmarkedet. Hvorvidt disse pres forandrer arbejdsmarkedet, diskuterer jeg kort på baggrund af resultaterne fra artiklerne i kapitel 5.

2.2.1. FLEXICURITY

Når man taler om det danske arbejdsmarked, er det svært at komme uden om flexicurity-begrebet, som har været med til at sikre den danske (og den hollandske) arbejdsmarkedsmodel stor international opmærksomhed (Madsen 2006). Det centrale i flexicurity-modellen er balancen mellem relativt høje kompensationsrater ved ledighed (i en vis tidsperiode), fleksible afskedigelsesregler samt en aktiv arbejdsmarkedspolitik. Denne kombination af sikkerhed og fleksibilitet har betydet, at danske arbejdstagere er mere mobile, fordi de ikke er så bekymrede for arbejdsløshed.

Flexicurity-modellen hviler således på tre ben, som alle indeholder dele, som er politisk reguleret (dagpengesatser, aktiv arbejdsmarkedspolitik osv.), samt elementer som er baseret på arbejdsmarkedsreguleringen (fx afskedigelsesfrister og -regler). Det er således samspillet mellem arbejdsmarkedsmodellen og den politiske regulering, der skaber flexicurity-modellen. De seneste politiske afkortninger af dagpengeperioden har medført omfattende diskussioner om konsekvenserne for flexicurity-modellen, og hvorvidt modellen stadig er live.

Det fleksible arbejdsmarked og den aktive arbejdsmarkedspolitik har sammen med høje kompensationsrater gjort det danske arbejdsmarked mere tilpasningsdygtigt. I en Schumpeteriansk tilpasning af økonomien kan arbejdskraften nemmere allokeres fra uddøende industrier (fx skibsværfterne og tekstilindustrien tidligere) og over i voksende industrier (som fx offshore-industrien i Vestjylland). Overordnet kan man tale om, at der er en kollektiv risikodeling, hvilket er med til at øge mobiliteten og omstillingsparatheden (Andersen et al. 2007; Hull Kristensen 2013; Vartiainen 2014). Dette er en styrke for dansk økonomi, men det er ikke det eneste positive aspekt ved den danske organisering af arbejdsmarkedet. I næste afsnit vil jeg diskutere en række af de aspekter, som er med til at gøre den danske model konkurrencedygtig og tiltrække international opmærksomhed.

2.3. DEN DANSKE SUPERMODEL?

The Nordics cluster at the top of league tables of everything from economic competitiveness to social health to happiness.

The Economist (2013)

The Economist udråbte i 2013 i en meget omtalt artikel den nordiske samfundsmodel som den næste supermodel. Til trods for omtalen er det dog ikke noget nyt, at de nordiske modeller tiltrækker sig international opmærksomhed. Både den danske og den nordiske model har af flere omgange været fremhævet som en rollemodel, men modellen har også i perioder været fremstillet som problemfyldte og utidssvarende. Tilbage i 80’erne var fortællingen, at skattetrykket var for højt og arbejdsmarkedet for rigidt, og at de nordiske velfærdsstater var ukonkurrencedygtige. For så blot igen ti år senere at blive fremhævet som eksempler på højest konkurrencedygtige og meget tilpasningsparate samfundsmodeller i den mere globaliserede verden (Calmfors 2014: 17).

De senere år har de nordiske lande igen fået en del positiv opmærksomhed, til trods for at især Danmark og Finland blev ganske hårdt ramt af krisen og efterfølgende har haft tilsvarende svært ved at få gang i den økonomiske vækst igen (Dølvik et al. 2015). Ikke desto mindre er de nordiske lande og Danmark ofte at finde i toppen af diverse internationale sammenligninger lige fra lykke-målinger over konkurrenceevne til hvor nemt, det er at oprette virksomheder. Samtidig med at landene klarer sig godt økonomisk, lykkes de med at kombinere dette med en høj grad af social lighed og inklusion (Sapir 2006). Det er især denne kombination, som har affødt den positive omtale som fx i The Economist, men også i et bredere akademisk felt (Einhorn og Logue 2010; Glatzer og Rueschemeyer 2005; Pontusson 2011; Sachs 2011; Ali-Yrkkö, Rouvinen og Ylä-Anttila 2011).

Denne afhandling deler mange af disse betragtninger (se artikel II-GVC) og argumenterer for, at den danske model på mange måder er yderst konkurrencedygtig. Men hvilke forhold er det så, der bidrager til dette? Her vil jeg argumentere for, at en fleksibel og omstillingsparat samfundsmodel med en høj tilpasningsevne (Goul Andersen 2007; Hull Kristensen 2013; Hull Kristensen og Lilja 2011) kombineret med en vis makroøkonomisk koordinering (Dølvik 2013b) er med til at give en stærk Schumpeteriansk konkurrenceevne (også kendt i den klassiske Rehn-Meidner-model), hvor danske virksomheder præsterer godt internationalt. Kombineret med en stærk tradition for innovation, omstillingsparathed og tilpasningsevne, også på arbejdsmarkedet via flexicurity-modellen, samt et egalitært og post-tayloristisk arbejdsmarked giver dette et stærkt fundament for en god konkurrenceevne og gode makroøkonomisk resultater, som påpeget i artikel II(GVC).

Det er ofte påpeget, at der er en positiv sammenhæng mellem makroøkonomisk koordinering og makroøkonomisk resultater både i en mere klassisk korporatistisk tradition (Cameron 1984) men også i nyere studier, der i høj grad har haft fokus på løndannelsen og overenskomstforhandlinger (Calmfors 1993; Traxler, Blaschke og Kittel 2001).[12] Argumentet er, at den makroøkonomiske koordinering kan skabe løntilbageholdenhed på de rigtige tidspunkter og derved bedre konkurrenceevne, lavere inflation og lav arbejdsløshed (Flanagan 1999; Traxler og Brandl 2012).

Et andet centralt argument har været, hvordan de nordiske fagforeninger, ved at insistere på en sammenpresset lønstruktur og høje minimumslønninger, har været med til at sikre en stærk Schumpeteriansk kapitalisme. Således blev de ikke-konkurrencedygtige virksomheder presset hurtigere ud af markedet af en produktivitetspisk, som via de høje lønomkostninger drev produktiviteten og den industrielle innovation frem. Samtidig betyder den sammenpressede lønstruktur, at de mest produktive firmaer får deres arbejdskraft til en klar underpris i forhold til deres udenlandske konkurrenter. Dette var hjørnestenene i den svenske fagbevægelses såkaldte Rehn-Meidner model i 1950'erne opkaldt efter de to

[12] Resultater fra den klassiske Calmfors/Driffill-analyse af lønkoordinering og makroøkonomiske resultater viser, at enten en høj grad af central koordinering eller en helt decentral model giver de bedste resultater.

ledende svenske LO-økonomer, som designede modellen (Erixon 2010). På sæt og vis kan man sige, at de nordiske socialdemokratier og fagbevægelser har været mere "kapitalistiske" eller markedsorienterede end i mange andre lande (Dølvik 2013b; Vartiainen 2014). Men modellen skal også ses i sammenhæng med en stor investering i uddannelse og efteruddannelse af arbejdskraften (Vartiainen 2014). Esping-Andersens model har været kritiseret for at overse, at det netop ikke var "*politics against markets*", som en af Esping-Andersens berømte bøger hedder, men "politics for markets". Men de to udelukker bestemt ikke hinanden. Arbejdskraften kan være de-kommodificeret via høje kompensationsrater og høje minimumslønninger samt uddannelse, *samtidig* med at arbejdskraften sikrede en kapitalistisk fleksibilitet og produktivitetsvækst, som kommer hele samfundet til gode (Andersen et al. 2007). Streeck har i øvrigt påpeget den samme funktion i det tyske arbejdsmarked i 1970'erne og 80'erne i den såkaldte "Diversified quality production"-tilgang (Streeck 1991). Den danske flexicurity-model, som blev præsenteret herover, deler mange træk med den klassiske Rehn-Meidner-model, hvor den store fleksibilitet i arbejdsmarkedet er med til at styrke konkurrenceevnen (Hull Kristensen 2013).

Når disse makroøkonomiske perspektiver så kombineres med en række andre særlige aspekter ved den nordiske model, får man en meget konkurrencedygtig model. De nordiske lande er således blandt de mest innovative i Europa (Fagerberg og Fosaas 2014; Lundvall 1992). Dertil kommer en egalitær ledelsesstil med stor medarbejderinddragning (Dølvik 2013b: 49). Nordiske virksomheder og organisationer har generelt bevæget sig mod en mere lærende og tillidsbaseret måde at organisere arbejdet på (Gustavsen 2007; Hull Kristensen, Lotz og Rocha 2011; Lorenz og Lundvall 2011), og de danske virksomheder er gode til at tilpasse sig kunders behov (Hull Kristensen 2011: 222). Casestudier af danske virksomheder viser fx, hvordan firmaer i industrien er gode til at udnytte deres medarbejderes kompetencer (Hull Kristensen et al. 2011). Derudover er centrale elementer arbejdsmarkedets organisering og velfærdsstaten; uddannelsessystemet, det høje offentlige serviceniveau (Hull Kristensen 2013: 212), fondsstrukturen i erhvervslivet, som binder en række meget vigtige virksomheder til Danmark på en international ret unik måde samt det politiske koalitionssystem. Derudover har de nordiske lande generelt også en åben politisk tilgang til de muligheder, globalisering giver, hvor man ikke forsøger at modvirke globalisering eller holde kunstigt liv i uddøende industrier (Ali-Yrkkö et al. 2011: 369; Andersen et al. 2007) i tråd med Rehn-Meidner tilgangen.

Men hvorvidt den danske model kommer under pres i en mere globaliseret verden, er et åbent spørgsmål, som er det centrale tema i afhandlingen. Artiklerne har således analyseret, hvordan forandringerne i den internationale økonomi kan påvirke den danske model. I kapitel 3 vil jeg diskutere de forskellige mekanismer, som er med til at overføre det mere abstrakte globaliseringspres til de konkrete udfordringer, der påpeges i artiklerne.

KAPITEL 3. GLOBALISERINGSPRES PÅ NATIONALE SYSTEMER?

Efter i foregående kapitel at have defineret og diskuteret den danske model som analysens centrale objekt og afhængige variabel, vil jeg her i kapitel 3, koncentrere mig om, hvordan globalisering kan påvirker de nationale arbejdsmarkedssystemer. Jeg vil diskutere de mest centrale mekanismer for, hvordan globalisering kan påvirke arbejdsmarkedet. Som jeg argumenterer for, så er kausalmekanismerne i mange analyser af globaliseringstendenser og forandringer af arbejdsmarkeder og velfærdsstat enten ikke eksplicitte eller uklare. Samlet peger en række studier på, at den direkte effekt af globalisering er forholdsvis begrænset, men mange af disse studier er netop baseret på makro-indikatorer (Brady et al. 2005) og kan derfor dække over store forandringer på sektor eller policy-niveau, som på længere sigt kan underminere institutioners funktioner (Korpi 2003). Hvad der således umiddelbart kan tolkes som institutionel stabilitet kan dække over markante forandringer (Streeck og Thelen 2005a; Streeck 2007), ligesom effekterne i vid udstrækning formodentlig er indirekte gennem forskellige mekanismer. Derfor er det vigtigt her at få klargjort, hvilke konkrete mekanismer eller processer som kan medføre, at globalisering har betydning for nationale institutioner. Det er hovedemnet i dette kapitel.

Overordnet er argumentet, at nationalstaten og velfærdsstater er skabt i samspil med, men også som modspil til, de internationale omgivelser og tendenser, og den fortsatte udvikling hænger sammen med den internationale udvikling[13] og den generelle kapitalistiske udvikling (Streeck 2009). Dette afspejler sig i afhandlingens tema.

Når globaliseringspresset skal konkretiseres, så fremhæves 1. kapital-mobilitet, 2. arbejdsmigration og 3. international priskonkurrence via de mere integrerede markeder oftest som de mekanismer, der har størst

[13] Afhandlingen ligger sig således (dog kun indirekte) tæt på en lang tradition for at analysere internationale og nationale tendenser som forbundne fænomener (fx Gourevitch 1978, 1986; Katzenstein 1985; Keohane and Nye 1973).

betydning for udviklingen på arbejdsmarkedet og i velfærdsstaten. Derfor er de også centrale her, ligesom de har betydning i artiklerne via den stigende konkurrence og arbejdsmigration. Udflytning af arbejdspladser kan også ses som et udtryk for, at kapitalen er mere mobil, og at der er stigende international konkurrence.

Det er ofte påpeget, at andre faktorer end globalisering er centrale, når man skal forklare forandringer i velfærdsstaten og arbejdsmarkedet (Brady et al. 2005; Pierson 1998). Fx argumenterer Hay og Wincott (2012: 66) for, at europæisering er vigtigere end globalisering, når vi skal forklare forandringer i de europæiske velfærdsstater. Men de indirekte effekter af globalisering på nationale processer kan være meget signifikante - også selvom der ikke er ændret noget målbart, hvilket gør, at effekterne nemmere bliver overset. Fx kan truslen om udflytning i sig selv være nok til at skabe forandringer på arbejdsmarkedet som løntilbageholdenhed og samtidig påvirke magtbalancen på arbejdsmarkedet. Således kan mekanismerne, som jeg diskuterer i dette afsnit, have stor betydning, også selvom de ikke omsættes i konkrete handlinger. Den mere diskursive effekt af globalisering vil jeg kort diskutere til sidst i dette kapital.

Netop pga. de indirekte effekter analyserer jeg to mekanismer, hvor effekten i højere grad kan være indirekte: liberalisering og europæisering. Dette afføder helt naturligt spørgsmålet om, hvorvidt liberalisering og europæisering er en del af globaliseringsprocesserne? Nogle globaliseringsteoretikere betoner det globale som det centrale, men det er oplagt, at regionale forbindelser også er vigtige som en del af det globale (Scholte 2008), og ofte er regionale sammenhænge mere vigtige end de globale (Dicken 2011; Hay 2006; Hirst, Thompson og Bromley 2009). Det er alt andet lige mere oplagt, at Danmark handler mere med Sverige end Kina, (Danmark importerer stadig mere end dobbelt så meget fra Sverige som fra Kina). Regionalisering, i det her tilfælde europæisering, bør således ses som et delelement af globaliseringen og ikke et modargument mod globalisering.

I afhandlingens overordnede perspektiv er kapitalismen et vigtigt begreb. Derfor bliver liberaliseringspresset også et centralt tema. Globaliseringen baserer sig på en fortsat udbredelse af centrale elementer i kapitalismen som markedet. Liberaliseringspresset, som både er økonomisk-strukturelt og politisk-ideologisk betinget, medfører et stigende pres for at liberalisere økonomier og institutioner og bliver derfor tæt forbundet med globaliseringsprocesserne. Samtidig har både europæisering og liberalisering stor betydning i flere af artiklerne, hvorfor en nærmere diskussion af begreberne er relevant.

Før diskussionen vender sig mod, hvordan de forskellige (globaliserings)-mekanismer kan medføre forandringer, er det relevant med en nærmere diskussion af selve globaliseringsbegrebet. Selvom begrebet er meget bredt og analytisk uklart, er det væsentligt at diskutere, hvad det dækker over, inden analysen går videre til de konkrete mekanismer.

3.1. GLOBALISERING – SAME AS IT NEVER WAS?

[Globalization is]a multicentric, multiscalar, multitemporal, multiform and multicausal process"

Jessop 2008: 178

Globalisering er et komplekst og sammensat fænomen (jf. Held et al. 1999; Jessop 2008: 178), som består af forskellige (og delvist modsatrettede) processer. Desuden sker globaliseringen i flere forskellige sfærer; økonomisk, politisk, militær, miljømæssigt, kulturelt osv. (Held et al. 1999). I denne afhandling er den økonomiske globalisering central, men den politiske globalisering inddrages også. Dele af den økonomiske globalisering er drevet af den politiske globalisering, ligesom den politiske dimension spiller en meget væsentlig rolle i den europæiske integration.

Begreber som globalisering og internationalisering bruges ofte som dækkende over mange forskellige processer, og internationalisering var tidligere den centrale term, hvor globalisering senere er blevet dominerende, ligesom der er uenighed om hvilken term, der er mest meningsfuld. Som tidligere nævnt, anvendes termerne synonymt her uanfægtet af disse diskussioner og forskelle.

Analysens definition af globalisering ligger sig tæt op af Held et al.s (1999: 15) klassiske;

> *"[T]he concept of globalization implies, first and foremost, a stretching of ... activities across frontiers such that events, decisions and activities in one region of the world can come to have significance for individuals and communities in distant regions of the globe".*

Heri betones den stigende interdependens, hvilket ofte fremhæves som det mest centrale ved den nuværende udvikling af globaliseringen (Goul Andersen 2010). David Harvey (1989) taler om en komprimering af "*time and space*", hvilket igen reflekterer den stigende intensitet og ekstensitet. Som tidligere nævnt arbejder jeg med en ganske bred definition af økonomisk globalisering, hvor det er defineret som: stigende økonomisk interdependens og integration på tværs af nationalstater og aktører i nationalstaterne.

Globalisering bliver her ikke behandlet som en traditionel uafhængig variabel, men bliver, jævnfør Jessops definition, i højere grad opfattet som en samlende betegnelse for en række kvalitative forandringer i og forandringspres på den måde, samfundet og arbejdsmarkedet er organiseret på. Hvor de kvantitative skift fx i økonomien er bedre beskrevet, er de kvalitative forandringer ofte dårligere beskrevet og sværere at indfange i statistisk data (Held et al. 1999: 11).

Afhandlingen beskæftiger sig primært med økonomisk globalisering, som igen kan brydes ned i en række delelementer, hvor jeg især fokuserer på den stigende kapital-mobilitet, stigende internationale konkurrence samt international integration af produktionen, som er central i GVC-tilgangen. Dertil kommer en række andre fænomener, såsom multinationale virksomheder (herunder banker), integration af handel og finans- og pengemarkeder, stigende internationale investeringer samt finansialisering.

Et gennemgående argument i denne afhandling er, at vi er nødt til at opdatere vores forståelse af globaliseringen. Massive forandringer, især i produktionsformerne og den teknologiske udvikling betyder, at globaliseringsforståelsen i mange både politiske, men også akademiske analyser er forældet. Figur 2 opsummerer nogle af de vigtigste forskelle.[14] Begreberne er analytiske idealtyper, argumentet er ikke, at al produktion er gået fra A til B, men essensen er, at der er sket et overordnet skifte i tråd med figur 2. Det er oplagt, at det ikke er et dag-til-dag skifte, dele af den ”gamle” globaliseringsforståelse trækker tråde langt tilbage i historien fx den fordistiske produktionsform.[15] Når jeg alligevel mener, at man kan stille det op på denne måde, er det fordi, *forståelsen* af og den *analytiske* tilgang til globalisering i vid udstrækning har været domineret af den ”gamle forståelse” skitseret i figur 2, hvor der især var fokus på handel.

Figur 2 den nye og gamle globaliseringsforståelse

	Den “gamle” globalisering	**Den “nye” globalisering**
Den centrale dimension	Handel	Produktion
Analyseniveau i internationale sammenligninger	Value traded (eksportværdi)	Value added (værditilvækst)
Teoretisk ramme	Komparative fordele (Ricardo)	Global value chains
International produktion	Horisontal	Vertikal, fragmenteret
Dominerende produktionsform	Fordistisk	Post-fordistisk, fragmenteret, Lean
Dominerende analyseenhed	Lande	Værdikæder, virksomheder, regioner
Toneangivende sektor	Industri	Service, IT

[14] Disse bliver desuden behandlet i artikel II(GVC) og Refslund (2012) samt Refslund og Goul Andersen (2014).

[15] Fordistisk forstået som integreret storskala produktion (populært ofte refereret som samlebåndsproduktion).

Det mest centrale element i figur 2 er den stigende globale integration af produktionen (Baldwin 2014; Dicken 2011), hvor det tidligere i højere grad var handelsintegration, der var i fokus. Dette hænger uløseligt sammen med den teknologiske udvikling og et skift mod mere specialiserede og fleksible (post-fordistiske) produktionsformer som Toyotaisme og Lean (Harvey 1989; Piore og Sabel 1984), som betyder, at produktionen kan brydes ned i uendeligt mange delprocesser. Et ekstremt eksempel er Apples Iphone (Refslund og Goul Andersen 2014: 9-10). Dette har medført en række andre forandringer, bl.a. dem figur 2 opremser, fx måden man opgør eksportværdien på, hvor der er kommet et meget større fokus på værditilvæksten end selve eksportvarens handelsværdi (Powers 2012). Disse forandringer bliver behandlet mere indgående i artikel II(GVC) samt i Refslund og Goul Andersen (2014), så jeg vil ikke gå dybere ind i dette her. Jeg vil dog kort berøre den central teoretiske ramme i analysen af den ”nye globalisering”: Global Value Chain-tilgangen.[16]

GVC-tilgangen (se bl.a. Arndt og Kierzkowski 2001; Bair 2009; Gereffi 2014; Gereffi, Humphrey og Sturgeon 2005; Gereffi og Korzeniewicz 1994; Huws et al. 2009) har fokus på, hvordan produktionen kan brydes ned i produktions- eller værdikæder. Inspirationen kommer især fra Wallersteins World system teori (Hopkins og Wallerstein 1977, 1986), men også Porter (1985) omtalte som en af de første værdikæden, ligesom Paul Krugman (1995) talte om; ”*slicing up the value chain”.* GVC-tilgangen har således den analytiske fordel, at produktionen opfattes som et sammenhængende hele sammensat af en række delprocesser. Disse delprocesser kan så flyttes rundt, hvor det er bedst og billigst at udføre de enkelte dele. Derved bliver det nemmere at analysere de beskrevne forandringer i den internationale økonomi, hvor produkter i stigende grad indgår i globale produktionskæder. Historisk har GVC-tilgangen haft stor fokus på styringen af værdikæderne, og dermed også på hvor værditilvæksten ender (Gereffi et al. 2005). Tilgangen fastholder således et magtperspektiv, som ofte er fraværende i andre virksomheds-centrede analyser (og som er helt fraværende i VoC-tilgangen). Derudover er tilgangen meget opmærksom på institutioner og

[16] Denne bliver også behandlet i artikel II(GVC), Refslund og Goul Andersen (2014) samt i Refslund (2012). I sidstnævnte er fokus på diskussionen af produktionsintegrationen og den deraf følgende betydning for magtrelationer.

forskelle i institutionelle design, og hvordan disse bidrager til mønstrer i værdikæderne, hvor virksomheder søger at udnytte de fordele, de forskellige institutionelle kontekster giver dem, hvilket er relevant i forhold til afhandlingens samlede fokus på den fortsatte divergens mellem nationale modeller.

I takt med den stigende globale integration af produktionen er det fremhævet i litteraturen, at der sket en såkaldt "*finansialisering*" af produktionen, hvor finansielle virkemidler har fået en mere central rolle i virksomhedernes produktion i forhold til tidligere, ligesom der i stigende grad er fokus på profitmaksimering eller "*share holder value*" især i de multinationale virksomheder (Lazonick og O'sullivan 2000; Milberg og Winkler 2010; Morgan 2014). Dette kan ses som en central del af analysen af den nye globalisering i tråd med Streecks (2011) argument om, at vi er nødt til at tage kapitalismen alvorlig.

Værdikæde-tilgangen er et heuristisk værktøj, som har fokus på fragmenteringen af produktionen samt på magtrelationer og institutionelle forhold. Således giver GVC-tilgangen en mere klar analyse af de forandringer, der sker i den globale økonomi, men også i den danske økonomi og i danske virksomheders position og muligheder. Artikel II(GVC), og især IV(udflytning) viser, hvordan GVC-tilgangen har stor relevans for dansk økonomi. Som fremhævet herover, så var det tidligere i højere grad hele produktionslinjer, som blev flyttet eller eksporteret, hvor det nu oftere er delprocesser. Slagtericase-studierne viser, hvordan en selv tidligere meget integreret produktionen på svineslagterierne er blevet international disintegreret, således at konkrete arbejdsprocesser, som fx udbening eller udskæring, som tidligere blev varetaget i Danmark, nemmere kan flyttes fx til Tyskland eller England.

Efter at have diskuteret nogle af de mest centrale forandringer i globaliseringen, vil jeg nu vende mig mod afhandlingens hovedspørgsmål: Igennem hvilke mekanismer kan globalisering påvirke det danske arbejdsmarked?

3.2. HVORDAN PÅVIRKER GLOBALISERING NATIONALE INSTITUTIONER

I hvilket omfang påvirker globalisering nationale institutioner? Det har optaget samfundsforskere gennem en lang årrække, og flere klassiske studier som Cameron (1978) og Katzenstein (1985) diskuterer sammenhængen mellem økonomisk åbenhed og nationale institutioner. Dette er videreført i lang række nyere studier (Busemeyer 2009; Garrett og Mitchell 2001; C. Jensen 2011; Walter 2010), hvor jeg her kort skal redegøre for de mest centrale positioner, inden jeg går videre til de konkrete mekanismer, hvor igennem effekterne kan kanaliseres.

Tidligere arbejdede man typisk med tre positioner: en tradition diskuterer sammenhængen mellem økonomisk åbenhed og velfærdsudgifter (Cameron 1978), hvilet senere er blevet videreudviklet til ”kompensations-tesen” (Garrett og Mitchell 2001; C. Jensen 2011: 169–70). Her medfører globalisering i sig selv stigende velfærdsudgifter, fordi staten, for at sikre fortsat opbakning til globalisering, må kompensere ”taberne” ved globalisering. Andre studier har hævdet, at globalisering per se fører til forringelser, fordi statens handlemulighed (fx finanspolitisk) bliver reduceret, kendt som effektivitets-, indskrænknings- eller konkurrence-tesen (Genschel 2004).[17] På samme måde argumenterer liberaliseringslitteraturen for, at globalisering i stigende grad påvirker nationale modeller i en negativ retning (Howell og Givan 2011). Endeligt fokuserer en institutionel orienteret litteratur på, hvordan institutioner medierer globaliseringens effekter (Kim og Zurlo 2009; Swank 2002). Disse empiriske sammenhænge er stadig omdiskuteret, og forskellige studier peger på forskellige resultater. Jeg vil derfor bevæge mig udover denne mere overordnede diskussion og se på, hvilke konkrete mekanismer der kanaliserer globaliseringseffekterne – især i forhold til arbejdsmarkedet.

Globalisering forandrer ikke direkte nationale institutioner, dette sker indirekte igennem fx kapitalmobilitet og konkurrencepres, som jeg vil diskutere nærmere herunder. Derudover kan globalisering påvirke det

[17] Eller som i en ekstrem form et race-to-the-bottom perspektiv (se fx Gray 1998; Mishra 1999)

socioøkonomiske fundament for arbejdsmarkeder og velfærdsstater fx gennem ændringer i industri- og erhvervsstrukturen. De mekanismer, som oftest bliver fremhævet, og som i afhandlingens artikler tillægges størst betydning, er en stigende kapital-mobilitet samt international integration af markeder og deraf følgende priskonkurrence.

Også arbejdsmigration fremhæves meget ofte som en mekanisme, hvor igennem globalisering kan påvirke arbejdsmarkedet. Teoretisk kan det diskuteres, hvorvidt arbejdsmigration er et direkte udtryk for økonomisk globalisering. Det er nok nærmere en dimension af globaliseringen, som altovervejende er politisk reguleret. Der er dog også omfattende ureguleret arbejdsmigration, hvilket i flere lande spiller en markant rolle, og selvom det ikke umiddelbart er et så markant fænomen i Danmark, er den illegale indvandring stigende (Tranæs og Jensen 2014). I artikel III(arbejdsmigration) påpeger jeg, hvordan den stigende europæiske arbejdsmigration har ganske vidtrækkende konsekvenser for den danske model især på områder, hvor det organiserede arbejdsmarked i forvejen står svagt. Derfor diskuterer jeg arbejdsmigrationens rolle i et afsnit her. Herefter vil de næste afsnit diskutere to andre centrale tendenser henholdsvis liberalisering og europæisering, som kan kædes sammen med den stigende globalisering. Slutteligt rejser det sidste afsnit et centralt spørgsmål i forlængelse af afhandlingens resultater; er effekterne af globalisering mere diskursive end strukturelle?

3.2.1. KAPITALMOBILITET

Når globaliseringens (primært negative) effekter på nationale institutioner bliver diskuteret, er det oftest den stigende kapital-mobilitet, som bliver fremhævet (Andersen og Sørensen 2014). Således kan ikke kun virksomheder, men også individer, flytte kapital fra et land til et andet uden at opleve nævneværdige problemer. Kapital-begrebet er her bredt forstået, som ikke blot økonomisk og monetær kapital såsom investeringer, profit, formuer o.l., men i lige så høj fysisk kapital som især produktion. I takt med produktionen bliver brudt ned i stadig mindre komponenter og delprocesser, kan virksomhederne nemmere flytte produktionen eller dele deraf til andre lande med mere gunstige forhold. Derudover kan virksomhederne nemmere placere ny produktion i andre lande. Denne stigende kapitalmobilitet er således med til at rykke ved magtbalancen på arbejdsmarkedet, idet arbejdstagernes bevægelsesmuligheder generelt er temmeligt begrænsede, især når man ser på det globale niveau (Ferner og Hyman 1998; Rodrik 1997; Tilly 1995a).

Det er ofte fremhævet, at den største udfordring for arbejdsmarkedet (primært arbejdstagerne) ikke nødvendigvis er globalisering i sig selv, men derimod den trussel som globalisering kan udgøre for arbejdstagerne fx udflytning af arbejdspladser (Bonoli, George og Taylor-Gooby 2000; Ferner og Hyman 1992, 1998; Flecker 2009; Marginson et al. 1995; Milberg og Winkler 2013; Rodrik 1997; Tilly 1995a). Dette kan bidrage til et ændret magtforhold på arbejdsmarkedet. Et forholdsvis jævnbyrdigt magtforhold er, som flere gange påpeget, et af de helt centrale træk i den danske model (Andersen et al. 2014). Det er i lyset af resultaterne i artiklerne måske netop den mere diskursive magt via truslen om udflytning, der har den største indflydelse.

Kapitalmobiliteten kan desuden være et problem for velfærdsstaten, såfremt den er med til at erodere skattegrundlaget, herunder hvis den udgående kapital medfører et lavt investeringsniveau i den nationale økonomi. Dette argument er naturligvis langt fra nyt. Det findes fx hos Adam Smith i "The Wealth of Nations" fra 1776 (Hay og Wincott 2012: 69-70). Men den fulde globale kapitalmobilitet forudsætter, at en række neo-klassiske økonomiske antagelser holder, fx at der er et perfekt globalt marked, og at producenterne har perfekt information om, hvor de får det bedste afkast på deres kapital (Hay og Wincott 2012: 71–72). Antagelser som disse er åbenlyst ikke opfyldt, og der er faktisk heller ikke meget empirisk bevis for lavere investeringsniveauer eller eroderet skattegrundlag i lande med højere gennemsnitsbeskatning (Hay og Wincott 2012: 118; Traxler og Woitech 2000).

Selskabsskattesatsen er blevet reduceret igennem de senere år både i Danmark og i det øvrige Europa (Genschel, Kemmerling og Seils 2011). Dette kan potentielt set være et udtryk for stigende kapitalmobilitet eller i hvert fald en politisk forståelse af, at der er stigende kapitalmobilitet, hvorfor man er nødt til at reducere selskabsskatten. Den samlede danske skatteindtægt (som andel af BNP) har dog været nogenlunde stabil siden

1998 frem til i dag (Andersen og Sørensen 2014:263–5), så umiddelbart tyder det ikke på, at statens skattegrundlag er ved at erodere (Stewart og Webb 2006).

I forhold til investeringsniveauet er der stadig en forholdsvis stærk hjemmemarkeds-bias i mange investeringer. Især pensionsfonde og andre institutionelle investorer samt småinvestorer har en forkærlighed for deres hjemmemarkeder (Hay og Wincott 2012: 83–88). Men dette udelukker dog ikke et faldende investeringsniveau pga. kapital-mobilitet, som på sigt kan blive problematisk.

Samtidig skal det fremhæves, at globalisering også medfører en række positive makroøkonomiske effekter, som også kommer arbejdstagerne til gode. Den mest centrale gevinst er typisk faldende priser som følge af internationale handel, hvilket kan øge efterspørgslen og dermed bidrage til økonomisk vækst (Andersen og Sørensen 2014:262). Dette kan være med til at opveje en række af de negative effekter, kapital-mobiliteten potentielt kan have.

Et andet aspekt, som handler om udflytning af primært arbejdspladser og andre arbejdsfunktioner fra virksomhederne, er mere indgående behandlet i artikel IV(udflytning), så jeg vil ikke gå i dybden med det her, men blot knytte et par kommentarer til denne vigtige dimension. Resultaterne i artiklen viser, baseret på dansk surveydata, at omfanget af danske arbejdspladser, der flytter ud af landet, stadig må siges at være ganske begrænset. Således bliver opfattelsen af "*foot-loose*" kapital, som hurtig flytter sig efter omkostninger og indtjeningsmuligheder, ikke bekræftet i artiklen. Der er en lang række forhold, som er med til at reducere omfanget af udflytning og binde virksomhederne til den lokale kontekst (Jensen og Pedersen 2011; Markusen 2004). Samlet er der heller ingen klare makroindikationer på problemer med den samlede beskæftigelse på det danske arbejdsmarked, som umiddelbart skulle være knyttet direkte til globalisering. Man skal selvfølgelig være forsigtig med at slutte fra tidligere resultater, så dermed ikke sagt, at udflytning ikke kan få en større betydning i fremtiden, men de nuværende resultater viser, at problemerne med udflytning er begrænsede (artikel IV-udflytning).

Stigende globalisering har gjort kapitalen mere mobil. Dette har især medvirket til en forskydning af forhandlingspositioner på arbejdsmarkedet, grundet kapitalens større mobilitet. Hvorvidt dette potentielt set mere er et diskursivt pres end et reelt pres, er et åbent spørgsmål.

3.2.2. INTERNATIONAL PRISKONKURRENCE

Et andet centralt aspekt er den globale integration af markeder, både for service og varer. Hvilket betyder en stigende international konkurrence. Dette gør sig ikke blot gældende på hjemmemarkedet, men i høj grad også på eksportmarkeder. På hjemmemarkedet betyder det, at sektorer, der tidligere var afskærmede, kommer under pres fra international konkurrence. Såfremt virksomhederne ikke er i stand til at tilpasse sig konkurrencen, fx gennem forbedringer i produktionen eller ved at udnytte nichemarkeder e.l., medfører konkurrencen typisk et pres for at reducere omkostningerne, hvilket igen ofte betyder et pres på arbejdstagerne. For at forbedre indtjening eller blot sikre overlevelse vil virksomhederne forsøge at reducere lønnen og/eller ændre arbejdsvilkårene fx forlænge arbejdstiden eller arbejdstempoet.

Især priskonkurrencen fra lavtlønslande og -producenter kan udgøre en udfordring for det nationale arbejdsmarked. Således kommer sektorer, der konkurrerer med sektorerne i lavtlønslandene, under et større konkurrencemæssigt pres som fx den danske skibsværftsindustri, som i løbet af en ganske kort årrække blev fuldstændig udkonkurreret af især østasiatiske konkurrenter. Hvorvidt sådanne tab af arbejdspladser er problematisk for økonomien (især på det lange sigt), afhænger af økonomiens evne til at skabe nye arbejdspladser, til at allokere arbejdskraften derhen, hvor der er brug for den samt til at opkvalificere og omskole arbejdskraften til de nye behov.

Igen er det vigtigt at huske, at der også er en positiv side af priskonkurrencen, herunder især at en række importvarer bliver billigere. For de nordiske modeller kan den stigende internationale konkurrence bidrage til en positiv omstilling af økonomien. Hvis vi antager, at Rehn-Meidner mekanismen stadig har en vis effekt på de nordiske økonomier, så vil priskonkurrencen være med til at presse nogle lav-produktive virksomheder ud og derved frigøre arbejdskraften til mere produktive brancher og virksomheder. Den kreative destruktion bliver således en central mekanisme i tilpasningen til den mere globaliserede økonomi.

Dansk økonomi har konkurrencefordele (forstået som over gennemsnittet eksport-andele) i et bredere udsnit af industrier end både de andre nordiske lande, men også Tyskland (Vihriälä 2014: 311–314). Dette kan være vigtigt for den danske konkurrenceevne og medvirke til, at økonomien ikke er så sårbar i den internationale priskonkurrence, og presset dermed bliver mindre på arbejdsmarkedet.

3.2.3. ARBEJDSMIGRATION

Migration i sig selv er ikke et udtryk for en stigende økonomisk globalisering, og Held et al. (1999) fremhæver migration som ét element i de samlede globaliseringsprocesser. Økonomisk globalisering og arbejdsmigration kan dog ofte være sammenfaldende, og især i det udvidede EU spiller arbejdsmigration en meget markant rolle (Dølvik 2013a). Hvilket artikel III(arbejdsmigration) samt slagtericasen viser, hvor både globalisering (og deraf stigende konkurrence) og arbejdsmigration bidrager til et stort pres på arbejdsmarkedet. Derfor vil jeg også diskutere arbejdsmigration her.

Arbejdsmigration har historisk været et udbredt og betydningsfuldt fænomen, men har været mere markant i nogle perioder fremfor andre (Held et al. 1999). Så længe der er enorme, globale socioøkonomiske forskelle i levevilkår, vil der være motivation for arbejdskraften til at migrere til områder med højere løn (eller måske blot med beskæftigelse i det hele taget). Arbejdskraftens frie globale bevægelighed er i høj grad politiske reguleret, fx er der omfattende restriktioner på ikke-EU borgeres adgang til det europæiske arbejdsmarked. Den politiske integration i Europa har medført, at arbejdsmigration igen er kommet til at spille en meget væsentlig rolle i det udvidede EU. Det kan især være en udfordring for den måde, de nordiske arbejdsmarkeder og velfærdsstater er organiseret på (Dølvik 2013a; Dølvik og Eldring 2008).

Som vist i artikel III(arbejdsmigration), kan arbejdsmigration have signifikant betydning for arbejdsmarkedet og reelt være med at ændre fundament for arbejdsmarkedet og sammensætningen på arbejdsmarkedet. Jeg påpeger i artiklen, at der er en tendens til, at lokale arbejdstagere, typisk dem som allerede befinder sig på kanten af arbejdsmarkedet, bliver erstattet af billigere arbejdsmigranter, der ofte ikke er omfattet af den nationale arbejdsmarkedsregulering. Schwartzman (2013) har i et stort studie af kyllingeindustrien i USA påvist den samme effekt, hvor primært sorte arbejdstagere bliver erstattet af mellem- og sydamerikansk arbejdskraft, som generelt får en lavere løn.

Et andet meget vigtigt aspekt i artikel III(arbejdsmigration) er, hvordan arbejdsmigranter bruges, som påpeget af Lillie og Greer (2007), til at skabe uregulerede ”lommer” i et ellers stærkt reguleret arbejdsmarked. Derved kan arbejdsmigration have samme effekt som kapital-mobilitet eller priskonkurrencen. Arbejdstagerne kan blive presset til indrømmelser på løn- og arbejdsvilkår under truslen om, at deres arbejde kan blive overtaget af migranter.

Arbejdsmigration kan således være en vigtig mekanisme i de samlede globaliseringsprocesser. Selvom arbejdsmigration ikke i sig selv er et udtryk for økonomisk globalisering, så har de to fænomener ofte samme effekt og kan være tæt forbundne. Samtidig er arbejdskraften, pga. politiske restriktioner, stadig væsentligt mindre globaliseret end både vare- og kapitalmarkederne.

3.3. LIBERALISERING

En teoretisk tilgang til globaliseringspresset er, at det kan ses som del af mere omfattende liberaliseringstendenser, hvor der er et stigende pres for at liberalisere og afregulere arbejdsmarkedet, industrial relations, social politik og velfærdsstaterne (Amable og Palombarini 2009; Baccaro og Howell 2011; Crouch 2011; Eichhorst 2014; Glyn 2006; Hall og Lamont 2013; Holst 2014; Howell og Givan 2011; Schmidt og Thatcher 2013; Streeck 2009, 2014). Hvor mere institutionelt orienterede analyser betoner den fortsatte divergens mellem lande med forskellige institutionelle konfigurationer, bliver resultatet ifølge liberaliseringstesen i stigende grad en konvergens mod en neoliberal model (Baccaro og Howell 2011). De globaliseringsmekanismer, som er påpeget herover, er med til at forstærke dette. Liberaliseringslitteraturen bygger således videre på reguleringsskolen (Amable, Barré og Boyer 1997; Boyer 1990), som netop betoner betydningen af transnationale forandringer i kapitalismen for institutionel forandring og stabilitet.

Et hovedargument i liberaliseringstilgangen er, at der siden 1980'erne er sket en stigende markedsekspansion og re-kommodificering af arbejdskraften (Glyn 2006; Korpi 1983: kap.6; Lash og Urry 1987; Offe 1985; Streeck 2014; Streeck og Thelen 2005b). Det er ofte fremhævet, at perioden siden 2.verdenskrig og frem til 1970'erne var kendetegnet af en mere reguleret kapitalisme (Lash og Urry 1987) bl.a. udtrykt via et institutionaliseret klassekompromis, ”*embedded liberalisme*” (Ruggie 1982) eller i Esping-Andersens terminologi en de-kommodificering af arbejdskraften. Denne konfiguration er under opbrud i de vestlige lande, hvor kapitalen i stigende grad er mere mobil og frigjort fra nationale politiske restriktioner (Glyn 2006). Således spreder markedstilgangen sig ind i områder, der tidligere under ”*the golden age*” i vid udstrækning var underlagt andre mekanismer end markedsmekanismen (Glyn 2006; Streeck 2009, 2014). I forhold til globalisering har Streeck (2007) rejst spørgsmålet, hvorvidt tiden efter 2.verdenskrig var kendetegnet af ”*markeder indenfor stater*”, og siden 1980'erne i stigende grad ”*stater indenfor markeder*”? Globalisering tvinger (via især kapital-mobiliteten) stater til at forfølge neoliberale politikker, eller det er i hvert fald forståelsen, (jeg vender tilbage til det diskursive element herunder).

Samlet argumenterer liberaliseringsteorien for, at dette medfører forandringer i produktionsstrukturen, deindustrialisering og finansialisering af produktionen samt et stigende konkurrencepres, og at både den relative magt mellem forskellige klassebaserede aktører, men også disse aktørers mål og interesser, har ændret sig under det neoliberale pres (Harvey 2005). Liberaliseringsteorien bygger derved på en lang tradition fra Marx, hvor netop den iboende modsætningsfyldte og dynamiske udvikling i kapitalisme kommer i centrum af analysen. Polanyi (1944) havde i høj grad fokus på den samme dynamik i hans analyse af kapitalismens ”*double movement*”. Denne konflikt giver sig udslag i den institutionelle teori, hvor dynamikken udspiller sig mellem det Streeck (2011) kalder "*Williamsonian*" institutioner, hvor institutioner ses som rent effektivitetsfremmende overfor "*Durkheimske*" institutioner, der netop skal regulere og afbøde de negative implikationer, som markedet kan have. Dette tema går også igen i flere af artiklerne, hvor især arbejdsmarkedsregulering og fagforeninger har karakter af Durkheimske institutioner.

Liberaliseringsteorien fremhæver således de politisk-økonomiske sammenhænge, som er betinget af et pres for at liberalisere og afregulere arbejdsmarkeder og nationale institutioner. Argumentet her er ikke, at globalisering er lige med liberalisering. Man kan sagtens have globaliseringstendenser uden at have liberaliseringstendenser. Der er både politiske og institutionelle valg, der kan påvirke globaliseringseffekterne (Campbell 2004). Men disse to begreber er dog i den nuværende udvikling tæt forbundne, og globaliseringspresset fører ofte til mere liberalisering. Disse sammenhænge kan være mere diskursive, og den komparative politiske økonomi har i stigende grad taget ideer og ideologis betydning for institutionel forandring til sig (Schmidt 2010).

Liberaliseringspresset er også aktuelt i casestudierne, hvor det er med at øge globaliseringspresset på arbejdsmarkedsmodellen, men dette skal jeg vende tilbage til i kapitel 5. I næste afsnit vil jeg diskutere den europæiske integration.

3.4. EUROPÆISERING

Hvorvidt europæisering, (forstået som tættere og mere forpligtende politisk og økonomisk integration i EU), skal ses som en del af globaliseringsprocesserne eller som et selvstændigt fænomen, er et åbent spørgsmål (Lynggaard 2011; Rosamond 2005), og det gælder som sådan både den økonomiske og den politiske dimension. Men som påpeget af Scholte (2008: 1493) eksisterer det globale ikke uafhængigt af det lokale og regionale. Det har været påpeget i forskellige sammenhænge, at europæisering kan ses som et filter eller en modvægt til globaliseringen, hvor den europæiske model er mere social-orienteret end den rå globalisering (Wallace 2000). Men som påpeget bl.a. af Scharpf, så bliver den ”sociale” europæiske dimension oftest overtrumfet af det indre marked og fjernelsen af barrierer for det indre marked (Hay og Wincott 2012: 135–144; Scharpf 1996, 2010). Der er ingen tvivl om, at europæisering er et vigtigt aspekt af den stigende økonomiske og politiske integration, og måske har det ligefremme større betydning for de nationale modeller end globalisering (Hay og Wincott 2012: 66). Jeg vil her redegøre for dele af europæiseringsdebatten samt opsummere, hvordan det europæiske projekt kan påvirke den danske model. I flere af artiklerne (I, III og V) står europæisering centralt i analysen.

I takt med at europæiseringen bliver mere og mere omfattende, stiger indflydelsen på den danske model også. Den stigende europæiske integration, (ofte benævnt europæisering og således også her), favner flere og flere policy-områder. Samtidig har europæiseringen og ikke mindst europæisk lovgivning samt domme fra EU-domstolen (som fx Metock-dommen og Laval-kvartetten) meget vidtrækkende konsekvenser for velfærdsstaten (Borchorst og Abrahamson 2004) og arbejdsmarkedsreguleringen, der ikke oprindeligt er omfattet af EU-retten (Crouch 2014b; Kristiansen 2013).

Der har siden Rom-traktaten været en såkaldt ”*social dimension*” af den europæiske integration, som handler om sociale rettigheder og velfærd. Den sociale dimension har i de senere år fået en vis opmærksomhed igen fx i *“*social investment*”*-tilgangen (Morel, Palier og Palme 2012) efter at være gledet i baggrunden i 00’erne. Alligevel er det yderst sjældent, at den sociale dimension får forrang over den såkaldte “negative integration”, som handler om at fjerne regulering o.l., som hæmmer det indre marked (Scharpf 1996, 2010). Tanken var oprindeligt, at det indre marked i sig selv ville sikre øget velstand, således at omfordeling og social politik gled i baggrunden, men reelt heller ikke ville være nødvendigt, fordi de markedsskabte velstandsforøgelser ville komme alle til gavn (Falkner 2010).

Det vedvarende mismatch mellem ”Social Europe” og skabelsen af et indre marked er især påpeget i flere omgange af Fritz Scharpf (1996, 2010, 2011), men mange andre har påpeget det samme (fx Barbier og Colomb 2014; Barbier 2013; Crouch 2014b; Höpner og Schäfer 2012; Leibfried og Pierson

2000; Ferrera 2005; Hay og Wincott 2012: 135–144; Leibfried 1993). Barbier og Colomb (2014: 24) opsummerer det om end nok lidt for dialektisk;

> ”…*when EU law is effectively implemented it tends systematically to endanger national systems of social protection and public services*.”

Der er ikke tvivl om, at europæiseringen påvirker de nationale modeller gennem den negative integration, som delvist er drevet via domme fra EU-domstolen, som generelt har fået en meget aktivistisk og politik-fortolkende rolle (Falkner 2010; Scharpf 2010). På arbejdsmarkedsområdet har en række domme som Laval, Luxembourg, Viking og Rüffert dommene fået stor betydning (se Refslund 2015). Den europæiske integration har således igen fået et ganske betydeligt (neo)-funktionalistisk præg (Jensen 2010), hvor det indre marked har ganske omfattende indflydelse på andre områder som arbejdsmarkedet og velfærdsstaten, som oprindeligt var områder, der ikke var omfattet af EU-reguleringen.

Den danske arbejdsmarkedsmodel oplever således i stigende grad EU-retlige forpligtelser (Kristiansen 2013), hvor lovgivning og håndhævelse af den enkelte lønmodtagers rettigheder fylder mere, og hvor kollektive og overenskomstfastsatte bestemmelser glider i baggrunden. Det er forventeligt, at de mere regulerede socialdemokratiske regimer i Norden bliver mere påvirket af europæisering end de liberale modeller, simpelthen fordi der er mere regulering, som kan komme i konflikt med frihedsrettighederne i det indre marked (Scharpf 2010: 238). Generelt opstår der ofte en konflikt mellem EU-(af)reguleringen af det indre marked og nationale tiltag, som forsøger at afbøde de negative konsekvenser deraf (Leibfried og Pierson 2000), hvilket bl.a. Laval- og Rüffertdommene viser (Refslund 2015).

Parterne spiller en central rolle i forhold til implementering af EU-lovgivningen i dansk ret, så der er stadig klare korporatistisk træk i den danske arbejdsmarkedsimplementering af EU-retten (Refslund 2015; Kristiansen 2013). Makro-korporatismen i Danmark er ellers på tilbagetog på en lang række områder herunder især de store politiske forlig og den makroøkonomiske styring (Jørgensen og Schulze 2011).

Generelt viser den danske udvikling efter Laval-dommene, (som er behandlet i Refslund 2015), hvordan der opstår udfordringer mellem den stigende europæiske integration, som rækker langt udover, hvad der oprindeligt lå i det Europæiske fælleskab på arbejdsmarkedsområdet (jf. (Scharpf 2010; Crouch 2014b). Derudover viser Laval-dommene også, hvordan den europæiske mere lov-baserede model, hvor domstolene spiller en mere aktiv rolle konflikter med den danske rets- og arbejdsmarkedstradition, hvor parterne i langt højere grad regulerer arbejdsmarkedet.

Samlet medfører den stigende europæisering en række udfordringer for den danske model, herunder arbejdsmigrationen som udfordrer de nordiske modeller (Refslund 2015; Kristiansen 2013; Artikel III-arbejdsmigration). Artikel V påpeger, at den stigende konkurrence mellem danske og tyske slagterier i høj grad er påvirket af den europæiske integration. De tyske slagteriers udnyttelse af billige østeuropæisk arbejdskraft er drevet af udviklingen i det indre marked, hvilket har stor betydning for danske slagterier og slagteriarbejdere. Dette hænger tæt sammen med den omfattende arbejdsmigration i Europa, hvor især østeuropæisk arbejdskraft bruges til at omgå de etablerede løn- og arbejdsforhold (Dølvik 2013a; Dølvik og Visser 2009; Lillie og Greer 2007). Slagtericasen viser, hvordan udfordringerne rækker langt udover landegrænserne. Men som påpeget i Refslund (2015) og slagteri-artiklerne (artikel I og V), så har det hidtil lykkes det danske arbejdsmarked at tilpasse sig den europæiske udvikling uden voldsomme forandringer i selve måden, det danske arbejdsmarked er organiseret på. Der er dog store udfordringer med at integrerer arbejdsmigranter på en række områder (se artikel III-arbejdsmigranter), så på længere sigt er det usikkert, om modellen kan modstå dualiseringstendenser.

3.5. GLOBALISERINGSDISKURSEN

One may well be concerned about 'globalization' without believing it to be exogenous to politics

Streeck 2007

I lyset af ovenstående diskussion og resultaterne fra artiklerne, som samlet finder, at globaliseringens direkte og umiddelbare effekter på nationale institutioner trods alt er forholdsvis begrænsede, er det relevant at stille spørgsmålet; i hvilket omfang er globaliseringens betydning i højere grad diskursiv? I de senere år har en stigende række prominente politologer fremhævet ideers centrale betydning for forandringer (eller fraværet af forandringer) i politiske konstellationer og institutioner (Blyth 1997, 2001, 2002; Campbell og Pedersen 2014; Crouch 2011; Culpepper 2008; Hall 1993; Larsen og Goul Andersen 2009; Schmidt 2010).

På samme måde påpeger andre, at diskursen om globalisering kan være det vigtigste element i at forklare globaliseringens betydning (Hay 2006; Hay og Rosamond 2002; Hay og Smith 2010). Globalisering har længe været påvirket af en diskursiv agenda eller en myte, som Weiss (1998) kalder det om, at staten ikke har nogen handlemuligheder i den globale økonomi. Til trods for den tidlige "*hyperglobaliserings-tese*" (fx Ohmae 1991) er lagt død (i hvert fald i akademiske analyser), fremstår globalisering, især blandt politikere, ofte mere i tråd med Weiss's myte, end empirien berettiger. Der er en række handlemuligheder i den globaliserede verden, og nationale institutioner er med til at mediere globaliseringens konsekvenser. Politiske motiver om at legitimere upopulære reformer kan være en af stærkeste forklaringer på den politiske brug af globaliseringspresset (Hay 2006; Watson og Hay 2003). Den neoliberale diskurs, som hænger sammen med globaliserings-narrativer om statens begrænsede handlemuligheder, synes at være meget fasttømret hos europæiske beslutningstagere (Crouch 2011; Schmidt og Thatcher 2013, 2014).

Hvorvidt politikerne reelt har den opfattelse, at globalisering begrænser statens handlemuligheder, eller det i højere grad afspejler en strategisk tilgang til globaliseringsprocessen, er et åbent spørgsmål. Vi har generelt meget lidt viden (udover offentlige dokumenter og taler) om beslutningstagernes holdninger og forståelse af globalisering. Hay og Smith (2010) har gennemført en undersøgelse blandt britiske og irske beslutningstagere, der viser, at disses ”offentlige” og ”private” forståelse af globalisering varierer. Den offentlige forståelse lægger mere vægt på ”nødvendigheden af forandringer som følge af globalisering”, end den ”private” gør (Hay og Smith 2010).

Fordi meget institutionel teori tidligere har haft fokus på stabilitet fremfor forandring fx stiafhængighed, er forandringer ofte blevet opfattet som eksogent som fx globalisering. Diskursiv institutionalisme, hvor ideer har en mere fremtrædende rolle, forklarer i højere grad forandringer som noget endogent (Schmidt 2010), hvor netop globaliseringsdiskursen kan være meget central. Derfor er det også yderst relevant at undersøge, hvordan globaliseringsdiskursen påvirker institutionelle forandringer. Dette ligger dog uden for denne afhandlings muligheder, men det vil være oplagt for fremtidig forskning at undersøge dette nærmere.

KAPITEL 4. METODE

Analyser af globaliseringens effekter på institutioner på tværs af mange lande har bidraget med vigtig viden til at forstå tvær-nationale variationer og sammenhænge, og både historisk-komparative analyser og mere variabel orienterede analyser har bidraget med vigtig viden. Fælles for de makro-komparative analyser er dog, at de ofte efterlader nogle huller i vores viden, som mere kontekstnær forskning nemmere kan belyse. Tværnationale analyser kan have svært ved at afdække komplekse kausale sammenhæng (Hall 2003: 383–84; Ragin 2000, 2004, 2014). Derfor er det relevant at undersøge kausalmekanismer på lavere aggregerede niveauer som fx et enkelt land (Hall 2003: 387; Ragin 2014; Tilly 1995b), som er målet i denne afhandling. ”*Within-case*” analyser komplementerer således de tværgående komparative studier (Mahoney 2000). Når man (via within-case studier) har lokaliseret forskellige kausalmekanismer, kan man bryde disse ned i flere korrelationelle analyser, som kan testes yderligere (Gerring 2010: 1517).

I forlængelse heraf kan casestudie forskning bidrage systematisk til den akkumulerede viden (Flyvbjerg 2006; Gerring 2007; Kuhn 1987). Som Flyvbjerg (2006: 219), kraftigt inspireret af Kuhn, formulerer det; ”*… a discipline without exemplars is an ineffective one”*. Denne afhandlings målsætning er således at bidrage med indsigter i de mekanismer, hvorigennem globalisering har effekt på nationale institutioner. Dette har været styrende for artiklerne og dermed case-udvælgelsen.

Derfor indgår casestudier som et centralt element i denne afhandling. Artikel I (slagtericasen), III (arbejdsmigration) og V (komparativ slagtericase) er casestudier i sig selv, men også artikel II (GVC) og IV (udflytning) kan siges at være casestudier af den danske økonomi eller særlige dele deraf. Studier af et enkelt objekt (som fx et-lands casestudie over tid) kan bidrage med systematisk og relevant viden, som kan sikre den samlede forskning en bedre indsigt i det specifikke fænomen (Flyvbjerg 2006) samt teste teorier på den enkelte case. Samtidig kan casestudier også være til at klargøre kausalsammenhænge, hvor analyserne i casestudierne kan identificere, hvad Mahoney har kaldt et kausalt narrativ, (hvilket her er ganske sammenfaldende med analysen af kausalmekanismer). Disse kan hjælpe med at identificere de kausale faktorer, som efterfølgende kan analyseres i komparative studier (Mahoney 2000; Rueschemeyer 2003: 307, 318).

Kritikken af casestudier, der i udgangspunktet kun beskæftiger sig med en case, bunder ofte i den misforståelse, at en case er lige med én observation (Rueschemeyer 2003: 332). I denne afhandling udgøres casestudiet af flere delanalyser af komplekse sammenhænge og fænomener, som bliver analyseret som en helhed. Denne case har ikke partout sine egne kausale sammenhænge, (hvilket ville give en induktiv teleologisk kausalitet), men reflekterer kausale forventninger baseret på bredere teoretiske propositioner. Disse forventninger guider og fokuserer analysen. Der indgår således forskellige teoretiske forklaringer samt flere analytiske dimensioner i den samlede analyse af den danske case.

I casestudie tilgangen er det nemmere at afdække den relevante empiri og dermed få den fornødne historiske og kontekstuelle indsigt i den enkelte case, hvilket kan være sværere i tvær-nationale studier. Denne afhandling lægger vægt på en historisk og kontekstuel forståelse af den danske case. Når man analyserer store spørgsmål (som globalisering og institutioner), er forståelsen af den historiske kontekst central (Hall 2003; Mahoney og Rueschemeyer 2003; Streeck 2009: 13, 2010a). En række forskellige tilgange, som i mere eller mindre grad har inspireret denne afhandling, trækker på historiske og kontekstuelle analyser herunder historisk institutionalisme, historisk og økonomisk sociologi og komparative historisk analyse. Disse ligger netop vægt på institutioners betydning over tid.

Herved kommer man ud over en række af de problemer, der kan være forbundet med makro-komparative (især makro-kvantitative) analyser, med komplekse kausale sammenhænge og udeladte variabel (Kittel 2006; Kittel og Winner 2005; Ragin 2014). Ligesom på overfladen stabile strukturer kan dække over markante forandringer, som er svære at lokalisere med kvantitative indikatorer (Baccaro og Howell 2011; Korpi 2003; Streeck 2007: 545).

Samlet er det afhandlingens mål at bidrage med en (eller flere) vigtige brikker i den samlede forståelse af, hvordan globalisering påvirker nationale institutioner især arbejdsmarkedet. Jeg påstår hermed ikke, at jeg med afhandlingen har knækket globaliseringens kode, men afhandlingen er et bidrag til at komme tættere på en både empirisk og teoretisk forståelse af denne proces. Dette er belyst gennem casestudierne, hvor en række centrale mekanismer som fx arbejdsmigration og europæisering er identificeret. Andre må så bidrage med andre brikker til det samlede billede, som kan sikre en solid og akkumuleret viden om emnet. I og med afhandlingen fokuserer på et enkelt land, er det ikke muligt at generalisere resultaterne fx til andre sociale modeller. Men eftersom den danske model deler så mange træk med den sociale model i de øvrige nordiske lande, kan en række af resultaterne fra denne afhandling måske være særligt interessante for vores nordiske kollegaer.

4.1. METODISKE OVERVEJELSER I DESIGNET

Som den altovervejende majoritet indenfor statskundskaben og sociologien deler jeg det videnskabsteoretiske ideal, at man skal søge at påvise kausale sammenhænge, fremfor sammenhænge der er unikke for en enkelt case (Gerring 2010: 1502; Nørgaard 2008). Men når man beskæftiger sig med et forskningsfelt, hvor de teoretiske konstruktioner ikke er fuldt udviklet, bør man være lidt tilbageholdende med de kausale ambitioner. Derfor er de kausale ambitioner i afhandlingen baseret på Gerrings (2005) minimalistiske forståelse af kausalitet, hvor det forstås som: ”*en årsag øger sandsynligheden for et bestemt udfald”*.

Målsætningen med denne afhandling bliver derfor i artiklerne at lokalisere de centrale mekanismer og dermed bidrage med viden om sammenhængen mellem globalisering og nationale institutioner i udvalgte sektorer og på udvalgte parametre som udflytning. Den nye viden, som disse nedslag i bestemte sektorer og fænomener bidrager med, styrker den akkumulerede viden indenfor forskningsfeltet. Disse brudstykker af viden kan, når de bliver sammenholdt med den eksisterende viden, være med til at give et overordnet billede af, hvordan globalisering påvirker nationale institutioner.

Metodiske valg bør reflektere forskningsspørgsmålet, så i forlængelse af GVC diskussionen er det relevant at inddrage mere kvantitativt data. Derfor bygger artikel II (GVC) og IV (udflytning) i højere grad end casestudie-artiklerne (artikel I, III og V) på kvantitativt data. Jeg diskuterer afhandlingens data i afsnit 4.1.2.

4.1.1. CASE UDVÆLGELSEN

Formålet er at belyse problemstillingen på forskellige niveauer for at opnå den bredest mulige indsigt i den danske case. Flere analyser i afhandlingen er på brancheniveauet (slagterisektoren, det grønne område og rengøring), mens andre analyser er på et mere aggregeret niveau: GVC-tilgangen til dansk økonomi (artikel II) samt de mere omfattende analyser af udflytning af arbejdspladser. De forskellige delemner og niveauer er udvalgt, fordi de bidrager med viden om, hvordan globalisering påvirker det danske arbejdsmarked. Samtidig er casene også udvalgt, fordi de er forskelligartede, og dermed bidrager med forskellige vinkler og indsigt i de mekanismer, som den overordnede afhandling søger at belyse. Således har problemstillingen været styrende for caseudvælgelsen

Afhandlingen starter med at spørge, hvorvidt globalisering anno 2015 er anderledes end tidligere, og hvilken betydning dette har for dansk økonomi og især det danske arbejdsmarked? I artikel II belyses dansk økonomi i en GVC-linse. Udflytning af arbejdspladser har været et centralt tema i den offentlige debat om globalisering, og er et centralt element af de forandrede produktionsmønstre, som påpeget i analysen af GVC-tilgangen. Derfor fokuserer artikel IV på udflytning og hvilke konsekvenser, dette har for den nationale økonomi. Disse mere overordnede tendenser i globaliseringen peger frem mod afhandlingens casestudier, hvor mere kvalitative aspekter analyseres.

Slagtericasen er på mange måder en speciel case, men interessant på flere måder end det måske ser ud til ved første øjekast. For det første viser den, hvordan globalisering ikke kun handler om lavtlønslande i Fjernøsten, men i lige så høj grad om integration og interdependens mellem lande, der i udgangspunkt havde meget sammenlignelige politisk-økonomiske systemer som Tyskland og Danmark. Desuden viser den, hvordan simple produkter som svinekød stadig kan være en styrkeposition i et høj-omkostningsland som Danmark. Derudover belyser den, hvordan centrale dimensioner som europæisering og priskonkurrence i det indre marked påvirker og ændrer forholdene i branchen. Slutteligt, men ikke mindst interessant viser den, hvordan der er handlingsmuligheder for sociale aktører (her de danske slagteriarbejdere og deres fagforening) i en mere globaliseret verden. Deres handlemuligheder er dog ikke skabt i et institutionelt vakuum, men er i vid udstrækning formet af den indlejrede magtposition, arbejdstagerne har i den danske model.

Analysen af arbejdsmigration viser, hvordan arbejdsgivere bruger arbejdsmigranter til at skabe uregulerede ”lommer” i et ellers meget regulerede arbejdsmarked. Derfor er sektorerne i analysen (det grønne område og rengøring - artikel III) udvalgt, fordi de fungerer som en ekstrem eller kritisk case på dette fænomen (Flyvbjerg 2006: 330; Gerring 2007: 115–22). De to sektorer er ubetinget blandt de mest påvirkede af arbejdsmigration (og europæisering), ligesom de historisk har været blandt de yderste og tyndeste lag i den danske model. Men dog alligevel en del af arbejdsmarkedsmodellen med ganske ordnede forhold især i sammenligning med andre lande. Derfor bliver udfordringerne for modellen i de sektorer interessante i forhold til den fremtidige udvikling af den samlede danske model. Samlet giver disse forskelligartede cases unikke indsigter i den overordnede problemstilling på hver deres måde, som forhåbentlig bliver klart ved læsningen af dem.

4.1.2. AFHANDLINGENS DATAGRUNDLAG

Afhandlingens datagrundlag afspejler det samlede forskningsdesign og de videnskabsteoretiske overvejelser, der ligger bag dette. Datagrundlaget for de enkelte delanalyser bliver diskuteret yderligere i artiklerne. Her skal knyttes et par overordnede kommentarer til datagrundlaget, som der ofte ikke er plads til i artikelformatet. Overordnet baserer afhandlingen sig på et miks af data, både kvalitativ og kvantitativ data samt naturligvis en kritisk læsning af den allerede eksisterende forskning og teori. En grundig læsning af den allerede eksisterende litteratur har været et styrende ideal igennem afhandlingen. Dette er essentielt, hvis idealet om samfundsvidenskaben som en kumulativ videnskab skal fastholdes.

I casestudierne i artikel I og V (slagtericasen og den komparative slagtericase) samt artikel III (arbejdsmigration) har den vigtigste datakilde været interviews i de berørte brancher. Det har været interviews med centrale aktører. Det vil sige især repræsentanter fra arbejdsgiver- og arbejdstagerorganisationer, ikke alene på det nationale niveau, men også i lokale fagforeninger og arbejdsgiverorganisationer. Derudover har jeg lavet virksomhedsinterview bl.a. med Danish Crown samt i rengøringsbranchen. Desuden har jeg interviewet en EU-parlamentariker samt organisationsrepræsentanter på det europæiske niveau. Alle interviews er optaget på bånd, og har efterfølgende fungeret som grundlag for den videre analyse. I og med fokus i interviewsene har været på de enkelte aktører og deres rolle og forståelse af casen, har der ikke været en fast interview-guide. Der er udarbejdet en specifik semi-struktureret interview-guide til hvert enkelt interview. Alt interviewdata er blevet tjekket i forhold til øvrige tilgængelige kilder (især de øvrige interview), ligesom jeg, med interessedimensionen in mente, har interviewet såvel arbejdsgiver- som arbejdstagerrepræsentanter på alle niveauer, så ingen udsagn står alene. Interviewdata er det centralt i artikel I og V (slagtericasen og den komparative slagtericase) samt artikel III (arbejdsmigration), men som sagt kontrolleret med andre kilder i det videst mulige omfang.

Jeg har løbende benyttet mig af kontakten med centrale aktører især i slagterisektoren, hvor jeg har fået repræsentanter fra både de faglige organisationer (NNF) og arbejdsgiverorganisationerne (DI) til at gennemlæse mine analyser som en slags lakmus-test. Ikke for at bedømme den videnskabelige kvalitet eller analyserne, men for at sikre at de kan genkende den overordnede fremstilling.

Kvantitative data har, i større eller mindre omfang, indgået i alle casestudierne i (artikel I-V). Ingen af artiklerne baserer sig således udelukkende på interviewdata. Statistiske makro-data (fx fra Danmarks Statistik, OECD, Eurostat m.v.) er inddraget både til at understøtte og krydstjekke resultaterne fra interviews. Sådanne makrodata har også dannet det kvantitative grundlag for artikel II (GVC). Artikel IV (udflytning) er baseret på analyser af et større datasæt fra Danmarks Statistisk. Datasættet er resultaterne fra en virksomhedssurvey, som er blevet koblet med registerdata fra Danmarks Statistik. Jeg har så efterfølgende kodet datasættet, så det kunne anvendes til analyserne i SPSS. Datasættet er nærmere beskrevet i artikel IV (udflytning), ligesom det er anvendt til yderligere analyser (bl.a. regressionsanalyser) i Refslund og Goul Andersen (2014).

Generelt er alle data i afhandlingen, i videst muligt omfang, kontrolleret i forhold til andre kilder, især selvfølgelig akademiske kilder, men også rapporter og analyser fra offentlig såvel som private organisationer samt medier-rapporter o.l.

KAPITEL 5. AFHANDLINGENS RESULTATER

I dette kapitel vil jeg opsummere afhandlingens overordnede resultater, og relatere dem til den eksisterende litteratur og viden på området. Som tidligere nævnt vil jeg ikke give et direkte referat af hver enkelt artikel, men henvise til selve artiklerne. Afhandlingens første del har diskuteret, hvordan globalisering egentlig skal forstås i forhold til den danske økonomi, mens den anden del har analyseret, hvordan globalisering påvirker det danske arbejdsmarked. Resultaterne diskuteres i det efterfølgende i en tematisk tilgang, hvor jeg følger afhandlingens overordnede struktur.

Således diskuterer jeg først i afsnit 5.1, afhandlingens resultater i forhold til globalisering og den danske økonomi. I afsnit 5.2 og 5.3 stiller jeg skarpt på de mest centrale udfordringer for den danske arbejdsmarkedsmodel, som afhandlingen peger på. Det er især det ændrede magtforhold på arbejdsmarkedet, som artiklerne belyser. Også her følger jeg en mere tematisk tilgang, hvor jeg først diskuterer de overordnede udfordringer, artiklerne påviser. Derefter diskuterer jeg de to mest centrale udfordringer for arbejdsmarkedet: 1. den ændrede magtbalance og 2. den stigende arbejdsmigration. Samlet peger jeg i kapitel 5.3 på, at forandringerne på det danske arbejdsmarked har en inkrementel karakter (jf. Streeck 2009; Streeck og Thelen 2005b). Hvorvidt dette medfører, at modellen grundlæggende forandres, er stadig et åbent spørgsmål.

Sluttelig perspektiverer jeg lidt bredere i afsnit 5.4, til et mere overordnet spørgsmål: Er den danske model langtidsholdbar? Man kan naturligvis ikke ekstrapolere fra den nuværende situation, men der kan påpeges nogle tendenser og institutionelle styrker, som ceteris paribus giver nogle mere optimistiske analyser af modellens fremtidsudsigter.

Det er vigtig at understrege, at afsnittet her skal opsummere nogle fællestræk på baggrund af afhandlingens resultater. Som diskuteret i metodeafsnittet kan man ikke generalisere resultaterne fra afhandlingen, men afhandlingen kan alligevel påpege nogle relevante tendenser især i forhold til de øvrige nordiske lande, der, som diskuteret indgående i kapitel 2, deler en lang række træk med den danske model.

5.1. DANSK ØKONOMI I EN GLOBALISERET VERDEN

Globalisering medfører en række forandringer i den globale økonomi herunder i produktionssystemerne (Baldwin 2014; Dicken 2011). Dette har markant betydning for dansk økonomi (Hull Kristensen 2011). Disse forandringer skyldes bl.a. den teknologiske udvikling især indenfor kommunikation, logistik og handelssystemer, internettets udvikling med online handel samt faldende transportomkostninger. Dertil kommer en stigende integration af produktionssystemer, men den politiske deregulering siden murens fald spiller også en væsentlig rolle. Disse empiriske forandringer har stor betydning for dansk økonomi, (som diskuteret i artikel II-GVC).

Analyserne af den danske case peger dog på, at globaliseringseffekten på nationale institutioner ikke er økonomisk-deterministisk. Som den komparative slagtericase viser (artikel V), bliver globaliseringspresset medieret via institutioner. Til trods for hyperglobalisering-teoriens (se fx Ohmae 1991) deroute fra den akademiske stjernehimmel så har en deterministisk og negativ forståelse af staternes handlemuligheder vist sig meget vedholdende især blandt beslutningstagerne.

Når det er sagt, er der en række områder, hvor globalisering sætter de nationale arbejdsmarkeder under et pres, som diskuteret herunder. Som diskuteret i artikel IV (udflytning), så har forandringerne i den globale økonomi også gjort udflytning af arbejdspladser fra virksomhederne mere tilgængeligt, om end det samlede omfang stadig er moderat, som artiklen påpeger. Dertil kommer priskonkurrence og et mere politisk betinget liberaliseringspres. I afsnit 5.2 og 5.3 vil jeg diskutere udfordringerne mere indgående.

Til trods for den stigende globalisering er den globale økonomi stadig meget langt fra det ”*globale marked*”, som Ohmae (1991) forudså, og som konkurrencetesen (effektivitetstesen, se afsnit 3.2) mere eller mindre eksplicit antager (Hay og Wincott 2012: 73–74). Der er stadig så mange institutionelle, politiske, tekniske og kulturelle restriktioner på det globale marked, at vi må konkludere, at antagelsen om global lønkonvergens (i økonomiske teori ofte præsenteret som loven om én pris) ligger meget langt ude i fremtiden (Hay og Wincott 2012: 73–74). Der er således et forholdsvis stort nationalt handlerum også for nationale sociale aktører herunder virksomheder, arbejdsmarkedsorganisationerne samt ikke mindst fagforeningerne, hvilket artiklerne også peger på især artikel II (GVC) og slagtericasen i artikel I og V.

Nationale strukturelle og politiske forhold samt institutioner (i den bredeste forstand) medierer og graduerer i hvilket omfang, de nationale modeller bliver påvirket af globaliseringen (Brady et al. 2005; Campbell 2004; Crouch 2005; Rodrik 2007; Swank 2002). Således kan ens politikker føre til vidt forskellige udfald i forskellige institutionelle kontekster (Esping-Andersen 1996; Hay og Wincott 2012: 171–75). Dette betyder også, at nogle modeller er mere udsatte for globaliseringspres. Som diskuteret tidligere peger mange analyser på (samt resultaterne i artikel II-GVC), at de nordiske lande er ganske godt rustede i den stigende globale konkurrence (Hull Kristensen 2011:220). Dette skyldes bl.a. en lang tradition for at åbne deres økonomier op mod omverdenen (Andersen et al. 2007), hvilket i øvrigt i høj grad er i tråd med det teoretiske argument i Rehn-Meidner modellen (Vartiainen 2014).

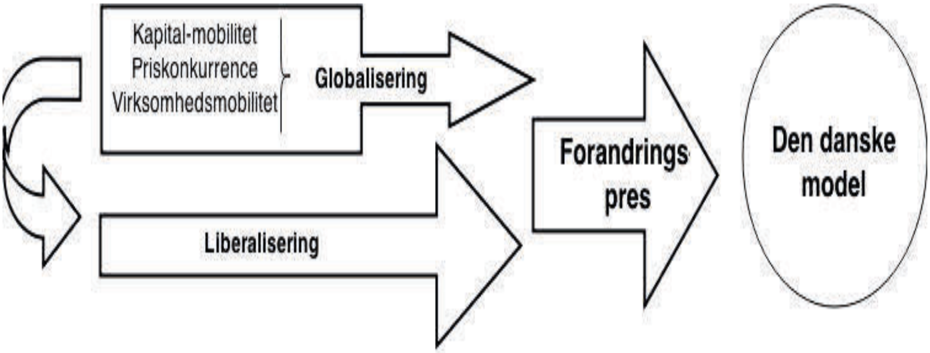
Overordnet peger resultaterne i artikel II (GVC) på, at GVC-tilgangen giver et mere nuanceret perspektiv på dansk økonomi end de traditionelle tilgange. Samlet er dansk økonomi ganske godt rustet i en mere globaliseret. Krisen ramte dog den danske økonomi ganske hårdt, og BNP-udviklingen har haft svært ved at nå niveauet fra før krisen (Goul Andersen 2011; Dølvik et al. 2015). Økonomien er dog meget robust på de fleste nøgletal, især offentlige finanser, eksporten og betalingsbalancen. Senest viser nye opgørelser, at også lønkonkurrenceevnen er på det højeste niveau siden 2000 (Børsen 11.11.2014). Samtidig viser artikel IV (udflytning), at danske virksomheder er blandt de mest aktive, når det kommer til at udflytte arbejdspladser, hvilket kan se som en indikator på, at danske virksomheder er gode til at udnytte de muligheder, globaliseringen giver dem (artikel IV-udflytning). Men selvom dansk økonomi klarer sig ganske godt, og globalisering ikke per se medfører forandringer i de danske arbejdsmarkedsinstitutioner, så medvirker globalisering alligevel til at skabe et pres på den måde, det danske arbejdsmarked er organiseret på (jf. artikel I, III og V).

5.2. UDFORDRINGERNE FOR DEN DANSKE MODEL

Den danske model oplever, som påpeget i flere af artiklerne, en række udfordringer pga. den stigende globalisering. De mest centrale tendenser ved den økonomiske globalisering (kapital-mobilitet, stigende priskonkurrence og udflytning af arbejdspladser) er med til at ændre magtforholdet på arbejdsmarkedet i arbejdsgivernes favør. Disse effekter forstærkes samtidig af den stigende arbejdsmigration i det udvidede EU. Det er netop den historiske magtbalance på det danske arbejdsmarked, der er med til at give modellen dens særtræk (Andersen et al. 2014; Dølvik 2013b; Esping-Andersen 1990; Esping-Andersen og Korpi 1984; Vartiainen 2014).

Globaliseringspresset og liberaliseringspresset er to uafhængige fænomener, men de bliver ofte sammenfaldende, som vist i figur 3. Dette er også klart i casestudie-artiklerne (I, III og V), hvor globaliserings- og liberaliseringspresset i de undersøgte brancher i høj grad smelter sammen, eller i hvert fald er meget svære at skille ad. Samtidig kan man argumentere for, at den stigende økonomiske globalisering *per se* er med at øge liberaliseringspresset. I takt med virksomhederne kommer under et stigende konkurrencepres, vil de forsøge at opnå liberaliseringer især forstået som afregulering af arbejdsmarkedet og dermed lavere lønninger, der kan opretholde deres konkurrenceevne, hvilket i sin tur øger det samlede liberaliseringspres (jf. slagtericasen).

Figur 3 Globalisering og liberaliseringspres



Den stigende kapitalmobilitet og muligheden for at flytte arbejdspladser ud af landet til lavtlønsområder, (hvad enten det så rent faktisk sker eller ej), kombineret med et stigende konkurrencepres på alle virksomheder, gør at det bliver mere fristende for arbejdsgiverne at forsøge at "*opte-out*" af den danske model (artikel III-arbejdsmigration). Samtidig har fagbevægelsen oplevet en vis svækkelse til dels på grund af dette pres og til dels andre forhold (se næste afsnit). Artiklerne viser, hvordan nogle arbejdsgivere, især i rengøring og det grønne område, forsøger at omgå de institutionaliserede arbejdsmarkedsregler og derved skabe det, som Lillie (Lillie 2010; Wagner og Lillie 2014) kalder "*non-regulated spaces*" indenfor de nationale grænser, hvor arbejdsmarkedsreguleringen ikke dækker. Samtidig er arbejdsgiverorganiseringen også et vigtigt element af den samlede model (Andersen et al. 2014; Martin og Swank 2012; Swenson 2002). Interne spændinger i arbejdsmarkedsmodellen kan blive resultatet af forandringspresset som i rengøringsbranchen og det såkaldte grønne område i artikel III (arbejdsmigration), hvor arbejdsgiverne også er splittede i forhold til hvorvidt, man skal udnytte de muligheder, der opstår eller følge den traditionelle regulering herunder overenskomsten. Dette bekræfter, at arbejdsgivernes interesser ikke bør opfattes homogent på tværs af sektorer og virksomheder (Korpi 2006).

Udviklingen på arbejdsmarkedet kan have helt central betydning for udviklingen i den sociale model, hvilket afspejler sig i afhandlingens bredere fokus på sociale modeller. Et tydeligt eksempel på denne tætte sammenhæng, (som er påpeget i den komparative slagteriartikel IV), er udviklingen i den tyske sociale model, som har bevæget sig fra en mere social-orienteret markedsmodel ofte karakteriseret som Rhinlands-kapitalisme (Albert 1992) eller koordineret markedsøkonomi (Hall og Soskice 2001) mod en mere dualiseret og lavtlønsorienteret social model. Udviklingen på det tyske arbejdsmarked har spillet en helt central rolle i dette (Carlin et al. 2015).

Hvorvidt den danske model er i stand til at tilpasse sig forandringer, og hvorvidt arbejdstagerne er i stand til at fastholde magtbalancen, er et åbent spørgsmål. Artiklerne viser, at tendensen peger mod, at magtbalancen er tippet – måske ikke helt, men i hvert fald delvist. Fx er de ”vilde slagteriarbejdere” ikke så vilde, som de har været, og de mere skrøbelige relationer i de analyserede brancher i artikel III (arbejdsmigration) er ganske givet også under pres.

5.3. DET DANSKE ARBEJDSMARKED: FORANDRING OG STABILITET

Jeg vil her opsummere afhandlingens vigtigste resultater i forhold til, hvorvidt arbejdsmarkedet gennemgår forandringer pga. globalisering. To specifikke aspekter skal fremhæves: den ændrede magtbalance og den stigende arbejdsmigration, hvorefter jeg kort diskuterer, hvad afhandlingens resultater viser i forhold til forandringer i den danske model.

Som påpeget af Marx (og senere Schumpeter), så er kapitalismen under konstant forandring, og i det seneste årti har de institutionelle teorier også i højere grad fået fokus på forandringer fremfor stabilitet (se fx Streeck og Thelen 2005a). Globaliseringen og liberaliseringen kan ses som udtryk for denne konstante bevægelse og dynamiske institutionelle udvikling. Streeck og Thelen (2005b) betoner, hvordan institutionelle forandringer kan opstå via forskellige mekanismer, hvorved fx institutioner får nye funktioner. Men udviklingen er netop dynamisk, og institutionernes udvikling og forandring er omstridt, så udfaldet er ikke nødvendigvis forandring, det kan også være en eller anden form for stabilitet. Det danske arbejdsmarked er ingen undtagelse, og det er således også under konstant udviklingen bl.a. pga.

forskellige pres på modellen.[18] Jeg vil her se nærmere på, hvordan globalisering bidrager til denne dynamiske udvikling.

5.3.1. ÆNDRET MAGTBALANCE

Forandringer som følge af globalisering hænger tæt sammen med konstellationer i den nationale politiske økonomi ikke mindst magtrelationen mellem arbejdstagere og arbejdsgivere (Glatzer og Rueschemeyer 2005: 7). Det er meget ofte fremført, at globalisering påvirker magtforholdet mellem arbejdstagere og arbejdsgivere (Bonoli et al. 2000; Collings 2008; Ferner og Hyman 1998; Flecker 2009; Hyman 2001; Hymer 1972; Marginson et al. 1995; Rodrik 1997; Tilly 1995a; Western 1997). Dette argument ligger sig ganske tæt op af kapitalmobilitets-argumentet. Idet kapitalen er mere mobil end arbejdstagerne, forskubber det magtbalancen på arbejdsmarkedet, og arbejdsgiverne kan nemmere spille arbejdstagere på forskellige lokaliteter ud mod hinanden. På sæt og vis en omvendt, global omgangsskrue.

I forlængelse heraf argumenterer jeg i artikel I, III og V samt Refslund (2013) for, at globalisering er med til at presse fagforeningerne i Danmark. Globalisering har ikke som sådan løbet de faglige organisationer over ende, men har ganske givet medvirket til at svække deres position. Den komparative slagtericase viser, hvordan udgangspunktet og den faglige styrke gør en stor forskel, hvor de tyske slagteriarbejderes qua deres svage faglige positioner har oplevet en fuldstændig erosion af deres arbejdsvilkår og løn i den stigende globale konkurrence. Den danske sektor har undgået tilsvarende lønnedgange og forringede arbejdsvilkår, men de faglige organisations styrke er reduceret i forhold til tidligere, derudover har de oplevet en betydelig udflytning af arbejdspladser (Refslund 2013; artikel I og V). Magtbalancen på arbejdsmarkedet er også ændret pga. den reelle trussel fra kapitelmobiliteten, hvor arbejdsgiverne nemmere kan flytte arbejdspladser, også uanfægtet af dette ikke sker så tit (jf. artikel IV-udflytning).

[18] For et historisk overblik over udvikling i de seneste år på arbejdsmarkedet samt i velfærdsstaten se (Goul Andersen 2011; Pedersen and Andersen 2014; Dølvik et al. 2015).

Den faldende fagforeningsstyrke kan dog langt fra alene tilskrives globaliseringsprocesserne men hænger i høj grad sammen med en række andre tendenser i de vesteuropæiske lande såsom stigende individualisering, politiske pres (Høgedahl 2014a), herunder ændringer i det danske Gent-system (Høgedahl 2014b; Lind 2009) samt deindustrialisering (Iversen og Cusack 2000). De danske fagforeninger er således under pres fra flere sider (Ibsen et al. 2012, 2013; Vartiainen 2014), men det påpegede globaliseringspres er med til at forstærke denne effekt.

5.3.2. ARBEJDSMIGRATION

Som tidligere diskuteret kan migration ikke i sig selv ses som en udtryk for stigende økonomisk globalisering, men bør i højere grad ses som et delfænomen i de samlede globaliseringsprocesser, som i høj grad er politisk reguleret. Således er den stigende arbejdsmigration af primært østeuropæisk arbejdskraft, som er omdrejningspunktet i artikel III (arbejdsmigration), faciliteret af den europæiske integration.

Den europæiske arbejdsmigration kan have vidtrækkende konsekvenser for arbejdsmarkedet og medvirke til at ændre arbejdsmarkedsregulering (Dølvik 2013a; Dølvik og Visser 2009; Woolfson 2007; Woolfson, Fudge og Thornqvist 2013), hvilket også understøttes i artikel III. Fraværet af bredtfavnende overenskomstdækning i nogle brancher og de spredte, skiftende og små arbejdssteder gør, at en række arbejdsgivere søger at skabe lommer af uregulerede arbejdsrelationer via den udbredte brug af arbejdsmigranter (Lillie 2010). Dette øger presset på de faglige organisationer i de analyserede brancher. Brancherne lider allerede af en lavere end gennemsnittet faglig organisering delvis grundet i historiske forhold i brancherne. Dette udfordrer de hårdt tilkæmpede arbejdsvilkår fx i rengøringsbranchen, hvor man kan tale om, at den danske model trods alt havde været succesfuld på dette område, der ellers meget ofte komparativt set lider af dårlige arbejdsforhold og lave lønninger (artikel III).

Resultaterne i artikel III peger på, at nogle IR-systemer er bedre til at integrere arbejdsmigranterne end andre (se fx Friberg et al. 2014; Menz 2005). Hvilket igen nuancerer det overordnede argument, at arbejdsmigrationen undergraver de nationale systemer. Samtidig viser casestudiet fra slagterisektoren, hvordan det er muligt at integrerer migranter fuldt ud i det danske IR-system (artikel V). Der synes således ikke at være belæg for, at arbejdsmigranterne ikke er villige til at indgå i de nationale IR-systemer, men at det i højere grad afhænger af den institutionelle og strukturelle setting, som forskellen mellem slagterierne og det grønne område (og til dels også bygge og anlæg) viser.

5.3.3. GLOBALISERING OG ARBEJDSMARKEDSFORANDRINGER – MANGE BÆKKE SMÅ

Samlet argumenterer jeg i afhandlingen for, at der (i tråd med liberaliseringstesen) er et væsentligt pres på den danske arbejdsmarkedsmodel. Dette har bl.a. medført en ændret magtbalance på arbejdsmarkedet (se især artikel III – arbejdsmigranter, men også slagtericasen i artikel I og V). Disse pres har ikke nødvendigvis en direkte transformerende effekt på institutionerne, men de bidrager til en proces, som over tid kan forandre arbejdsmarkedets indretning. Forandringer af arbejdsmarkedsinstitutioner bliver således typisk inkrementelle og sker ved, at institutionerne ændrer funktionsmåde, eller på anden måde redefinerer sig selv (Campbell 2004; Hall og Thelen 2009; Howell og Givan 2011:235; Streeck og Thelen 2005b). Hvornår en række mindre forandringer er nok til, at vi kan tale om et egentlig systemskifte, det er uklart (Crouch 2007: 529–31). Nogle af de påpegede tendenser i afhandlingen har dog mere karakter af en omgåelse af det etablerede arbejdsmarkedssystem især i artikel III (arbejdsmigration), hvor nogle arbejdsgivere søger at ansætte østeuropæiske arbejdsmigranter uden om de etablerede overenskomster.

På en række områder synes den korpianske arbejdsmarkedsmodel bedre rustet end andre arbejdsmarkedsmodeller til at møde globaliseringsudfordringerne. Igen viser slagtericasen, om end det måske er et ekstremt eksempel (fx den tætte sammenkobling mellem primærproduktionen og forarbejdning), hvordan en stærk fagforening med en høj organisationsgrad kan imødegå selv massive liberaliseringspres. De danske slagteriarbejdere står ekstremt stærkt i sammenligning med deres tyske kollegaer, hvor den tyske arbejdsmarkedsmodel (men også sociale model) slet ikke har kunnet modstå liberaliseringspresset (artikel V). Således kan en stærk institutionel konfiguration tvinge virksomhederne og arbejdsgiverne til at acceptere arbejdsmarkedsregulering, som givet ikke er deres første præference (Korpi 2006).

Samlet er globalisering med til at forstærke politiske og strukturelle pres på arbejdsmarkedsmodellen. Hvorvidt det så fører til en radikal forandring af IR-modellen (Due og Madsen 2008), er et åbnet spørgsmål. Hvor en række studier på den ene side peger på fundamentelle forandringer i de nordiske IR-systemer (se fx Lillie og Sippola 2011; Sippola 2012), peger mange studier på en fortsat relevans både af den nordiske model (Andersen et al. 2014; Dølvik 2013b) samt den danske model (Due og Madsen 2008). Denne afhandling peger på en række udfordringer for den danske model i kølvandet på den stigende globalisering, hvoraf flere kan have meget vidtrækkende konsekvenser for den danske model. Indtil videre er der dog ikke tale om en erosion af den samlede model, på trods af de påpegede svækkelser (især i artikel III – arbejdsmigration). Afhandlinger viser, hvordan IR-reguleringen på slagteriområdet ikke i noget videre omfang er svækket, til trods for et markant konkurrence- og liberaliseringspres i sektoren.

Et muligt resultat af en svækkelse af arbejdsmarkedsmodellen kan være stigende lovregulering – fx en lovbestemt mindsteløn, som det er set i en række europæiske lande herunder Tyskland. Staten er stadig en stærk aktør i de nordiske lande (Dølvik 2013b), hvilket øger statens kapacitet for at lave lovindgreb. Norge har fx set en stigende lovregulering af arbejdsmarkedet bl.a. på baggrund af udfordringer fra intra-europæisk arbejdsmigration (Eldring og Schulten 2012:243–47), men, som nævnt adskiller den norske model sig på en række områder fra den danske (Andersen et al. 2014).

På trods af omfattende udfordringer i nogle sektorer, især sektorer der er meget påvirket af arbejdsmigration (jf. artikel III-arbejdsmigration), står arbejdsmarkedets parter stadig forholdsvis stærkt i den danske model. Selve kapitalmobiliteten har ikke de store direkte konsekvenser for modellen, men globalisering påvirker ganske givet magtbalancen i IR-modellen.

5.4. ER DEN DANSKE MODEL HOLDBAR?

Hvorvidt den danske model fortsat er i stand til at fastholde de centrale træk, er et stort spørgsmål, som det ligger uden for afhandlingens problemstilling at besvare. Afhandlingen påviser dog nogle interessante tendenser, som gør, at jeg her afslutningsvis vil perspektivere afhandlingens resultater i forhold til modellens fremtidsudsigter.

I denne overordnede vurdering vil jeg især hæfte mig ved to aspekter, for det første den overordnede evne til at skabe langtidsholdbare makroøkonomiske løsninger, forstået som høj international konkurrenceevne og konstant jobskabelse og dermed beskæftigelse og som det andet den iboende modstand mod liberaliseringspresset, som modellen, modsat andre sociale modeller, synes at rumme qua magtbalancen mellem arbejdstagere og arbejdsgivere.

Som jeg tidligere har diskuteret, har den danske (og den nordiske) model fået en del positiv opmærksom. Især evnen til at kombinere stærke makroøkonomiske resultater og dermed høj økonomisk velstand med et højt niveau af lighed og inklusion (bl.a. på arbejdsmarkedet) bliver fremhævet (se fx Sapir 2006). Historisk har de nordiske økonomier været åbne overfor globaliseringen og søgt at udnytte de fordele, globaliseringen potentielt har givet dem (Andersen et al. 2007; Dølvik 2013b; Hull Kristensen og Lilja 2011; Vartiainen 2014; Ali-Yrkkö et al. 2011). Til trods for en række problemer i forlængelse af finanskrisen, hvor især Finland og Danmark stadig er præget af lav økonomisk vækst (Dølvik et al. 2015), så er den nordiske model stadig meget konkurrencedygtig (Andersen et al. 2007; Vartiainen 2014). Det høje uddannelsesniveau og fleksibiliteten i arbejdsmarkedet betyder, at modellen er god til at omstille sig. Den historiske Rehn-Meidner tilgang er videreført i et vist omfang, om end nok ikke så bevidst som tidligere (Hull Kristensen 2011). Staten har ikke understøttet ikke-konkurrencedygtige erhverv og kombineret med et højt bundlønniveau, som har presset ikke-konkurrencedygtige virksomheder ud, har det betydet, at virksomhederne er ganske konkurrencedygtige (Vartiainen 2014). Når dette kombineres med en stor tilpasningsevne (Hull Kristensen 2013; Hull Kristensen og Lilja 2011) og en høj grad af innovation (Hull Kristensen et al. 2011; Lorenz og Lundvall 2011), så virker de nordiske modeller ganske godt rustet til at konkurrere på det globale marked. Danske virksomheder klarer sig godt i en bred vifte af erhverv (Vihriälä 2014: 311–314), herunder fx vind-, medicinal- og shippingindustrien. Samtidig er de er gode til at tilpasse sig kundernes behov og tilbyde sofistikerede og service-orienterede varer og ydelser (Hull Kristensen 2011: 222).

Den danske arbejdsmarkedsmodel, som udgør en central del af den samlede social model, virker derimod mere skrøbelig. Denne afhandling har påpeget en række udfordringer som følge af den stigende internationale integration, herunder ikke mindst den stigende arbejdsmigration indenfor det udvidede EU. Globaliseringen er, sammen med et stigende liberaliseringspres, med til at fremme nogle af de interne politiske og organisatoriske spændinger i modellen, som måske i højere grad er en trussel mod modellen end globalisering, i hvert fald den direkte effekt af globalisering (Vartiainen 2014: 9). Hvis især arbejdstagerorganisationerne ikke kan opretholde den styrke, som har været en helt central dimension både i den danske sociale models udvikling, men også dens videreudvikling, kan det have stor betydning for den fremtidige samfundsudvikling. Især den høj grad af lighed i samfundet og på arbejdsmarkedet kan komme under pres. Forandringer i den retning kan i sin tur åbne for flere politiske løsninger, hvor fx almengørelse af overenskomster har været diskuteret.

Hvorvidt modellen endnu en gang formår at tilpasse sig de udfordringer, den står overfor, er usikkert, men resultaterne i afhandlingen viser, at der fortsat er politiske valgmuligheder i en mere globaliseret verden.

KAPITEL 6. KONKLUSION

I en stadig mere globaliseret verden, hvor produktionen integreres i globale værdier kæder (GVC), får globalisering en stigende betydning for de nationale sociale modeller. Selvom den danske økonomi klarer sig godt på det makroøkonomiske niveau, så medfører især den stigende kapitalmobilitet og den skærpede internationale konkurrence et pres på den danske arbejdsmarkedsmodel, især på arbejdstagerne og deres kollektive organisering. Dette forstærkes yderligere af et liberaliseringspres og stigende europæisk integration og den deraf følgende arbejdsmigration i det udvidede EU. Artiklerne (I, III og V) viser via casestudier, hvordan forskellige brancher påvirkes i forskelligt omfang. Især brancher, hvor arbejdstagerne af historiske (eller andre) årsager står svagt, er væsentligt mere udsatte. Samlet viser afhandlingen, hvordan den institutionelle setting har stor betydning for resultatet af globaliseringspresset, og især den faglige organisering kan have en væsentlig medierende effekt. Resultaterne peger dermed på fortsat divergens mellem forskellige regimer. Globalisering i sig selv fører ikke til, at stater er nødt til at tilpasse samfundsmodellen, og vi bør således ikke opfatte globaliseringen deterministisk eller teleologisk. Institutioner medierer globaliseringens effekter på sociale modeller.

Der er således et markant råderum for nationale modeller i den stigende globalisering og forskellige veje til succes i den globale økonomi (Breznitz og Zysman 2013: 390; Rodrik 2007). De nordiske modeller er ganske godt stillet qua fleksible og innovative tilpasninger til den stigende konkurrence (Andersen et al. 2007; Hull Kristensen 2011; Vartiainen 2014). Men i takt med den stigende internationale økonomiske integration kan de nationale sociale modeller komme under yderligere pres.

Jeg viser i artikel II(GVC), hvordan global value chain-perspektivet har en analytisk styrke ved at fokusere på produktionsprocessen fremfor den endelige vare. Forandringer i produktionssystemerne og den måde produktionen er organiseret på, er meget centrale i analyser af den internationale økonomi (Baldwin 2014; Dicken 2011). GVC-analyser af både den internationale, men også den danske økonomi (som i artikel II), er med til at nuancere og forbedre vores globaliseringsforståelse. Mange hidtidige analyser har haft en delvis forældet forståelse af, hvad globalisering medfører, (og hvad det i det hele taget dækker over), ligesom mange især policy-makers har en ganske deterministisk forståelse af globalisering, som der ikke umiddelbart synes at være empirisk belæg for.

I artikel IV(udflytning) undersøger jeg et enkelt delelement i globaliseringen mere indgående. Offshoring, eller på dansk udflytning af arbejdspladser, er et fænomen, der har tiltrukket sig stor opmærksomhed, og det kan have betydelige effekter på de nationale systemer. Det overordnede samlede omfang er dog stadig forholdsvis begrænset jf. resultaterne i artikel IV. Hvilket peger på, at der er et markant diskursivt element i globaliseringen, hvor udflytning ofte fremhæves som et meget omfangsrigt fænomen, også væsentlig mere end det empiriske omfang berettiger til.

Globalisering ændrer ikke i sig selv arbejdsmarkedsmodellen, men kan bidrage til et pres for forandringer. Globalisering og økonomisk åbenhed har en række positive effekter, men fokus i artiklerne har været på effekten på arbejdsmarkedet, som langt hen ad vejen er negativ for løn- og arbejdsvilkår. Som vist i casestudierne af brancherne og diskuteret i afsnit 5.2 her, så falder globaliseringspresset ofte sammen med et stigende liberaliseringspres, således at de to fænomener forstærker hinanden. Til trods for, at det er to forskellige fænomener, tenderer de imod ofte at være to sider af samme sag i den nuværende politiske økonomi i hvert fald, når det kommer til arbejdsmarkedseffekten. Branche casestudierne viser, hvordan effekten er stærkere i mere udsatte brancher, som det grønne område eller rengøring, hvor arbejdsmarkedsreguleringen er svagere end gennemsnittet. Det skal dog noteres her, at den største udfordring i de analyserede brancher i artikel III (arbejdsmigration) er arbejdsgivere, der søger at udnytte arbejdsmigrationen til at omgå de etablerede arbejds- og lønforhold.

Samtidig viser artiklerne (slagtericasen i artikel I og V samt III-arbejdsmigration), hvordan arbejdstagernes magt i den enkelte sektor er med til at forme og ændre udfaldet i tråd med magtresurseteorien. Her viser den komparative slagtericase, om end nok som en ekstrem case, hvordan meget markante forskelle i magtresurser fører til enorme forskelle i løn- og arbejdsvilkår.

Samlet viser branchecasestudierne, hvordan inputkonvergens, som fx globaliseringspresset, ikke fører til konvergens hverken af resultater eller de politiske systemer. Der er således stadig et stort politisk handlerum i de berørte lande, fordi institutioner i den bredeste forstand medierer, hvordan globalisering bliver (så at sige) ”oversat” til eller implementeret i den nationale kontekst. Især på arbejdsmarkedet er det en til stadighed vedvarende konflikt over, hvordan arbejdsmarkedsinstitutionerne skal indrettes.

Sluttelig vil jeg, i forlængelse af afhandlingens resultater, kort fremhæve den potentielle diskursive effekt som globaliseringen har (Hay 2006; Hay og Smith 2010), hvor diverse reformer og policytiltag ofte begrundes med globaliseringen. Det hænger til dels sammen med, at mange beslutningstagere stadig hænger fast i en delvist forældet forståelse af globalisering, men det kan også være, som påpeget af Hay, at globaliseringsdiskursen udnyttes af politikere til at gennemføre ellers upopulære reformer. Afhandlingen har ikke direkte undersøgt det diskursive element, men dette vil være interessant at undersøge yderligere i fremtidig forskning.

Den danske arbejdsmarkedsmodel er på mange måder fleksibel, men globaliseringens udfordringer kan potentielt føre til så markante omvæltninger, at modellen grundlæggende ændrer karakter. I lyset af arbejdstagernes centrale betydning for den danske model hænger det i høj grad sammen med, hvorvidt arbejdstagernes position bliver undergravet. Hvis dette er tilfældet ligger vejen åben for vidtgående forandringer, som kan trække den samlede samfundsmodel i andre og markant anderledes retninger end den nuværende.

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ARTIKEL I – OFFSHORING DANISH JOBS TO GERMANY – REGIONAL EFFECTS AND CHALLENGES TO WORKERS' ORGANISATION IN THE SLAUGHTERHOUSE INDUSTRY*

by

Bjarke Refslund

Abstract

Increasing internationalisation of production is often seen as causing an erosion of West European social systems and, in particular, the worker's position, but the macro-level empirical evidence is often flawed. This article provides evidence based on a case study of Danish slaughterhouses that offshoring strongly affects the power relations within the industry. These changes in industrial relations can largely be explained by developments in the German slaughterhouse industry and changes in European legislation which have greatly influenced a shift towards more precarious employment in slaughterhouses, using the work of subcontracted workers from Eastern Europe. This article analyses the significant role played by European integration and globalisation in altering the international division of labour and employer-employee relations.

* Refslund, Bjarke (2012). "Offshoring Danish jobs to Germany: regional effects and challenges to workers' organisation in the slaughterhouse industry". *Work Organisation, Labour & Globalisation*. 6(2): 113-129. ©

INTRODUCTION

This article aims to contribute to the knowledge of how increased economic internationalisation and competition affect industrial relations in general and workers' position in particular, and how this contributes to the intensification of precarious work in Europe and especially Germany. This is addressed through a sector case study of the offshoring of Danish slaughterhouses jobs to Germany, as a result of increased international competition. The article emphasises the increasing importance of European integration both for industrial relations and for changing modes of production in Europe, a topic which has often been neglected in a field where the main focus has been on the role of China and other low-wage Asian countries in the changing international division of labour (see, for example, Glyn, 2006).

Increasing global economic integration[1] is often highlighted as one of the main reasons for the decline in trade union strength in affluent countries. In particular, the fact that production processes and value chains have become more mobile and can be broken down into smaller fragments has allowed activities to be outsourced and offshored to where it is most profitable[2]. This makes production ever more geographically fragmented and creates an unprecedented global division of labour (Gereffi & Korzeniewicz, 1994; Gereffi, 2005; Baldwin, 2006; Held, McGrew, Goldblatt & Perraton, 1999)[3]. Firms can also more easily replace labour in one country with cheaper or less-organised labour in another (Bhagwati, 1995; Bonoli, George & Taylor-Gooby, 2000:60-61; Rodrik, 1997; Slaughter, 2007:334-35). Moreover, increased international competition is affecting power relations, since companies are experiencing intensified competition which consequently creates pressure to reduce production costs and especially wages (Baldwin, 2006; Held, McGrew, Goldblatt & Perraton, 1999:278; Bonoli, George &

[1] The terms 'globalisation' and 'global economic integration' are often used synonymously. Obviously globalisation per se covers several dimensions and processes other than just economic ones (Held, McGrew, Goldblatt & Perraton, 1999). Here the main focus is on the consequences of economic globalisation, so the terms will be used interchangeably.
[2] Other processes like trade import and labour migration can also have a significant impact here.
[3] The international division of labour is by no means a new phenomenon, being discussed in the writings of Smith and Ricardo, but the very high level of fragmentation into global value chains is a novel feature of modern capitalism.

Taylor-Gooby, 2000:54). The apparent relationship between globalisation and the weakening of employee position is difficult to validate empirically at the national level; evidence is often anecdotal or the causality questionable. Only a few sector-level studies support the hypothesis that globalisation weakens workers' position[4], whereas it is more often confirmed by firm-level studies (Crinó, 2009:218). So while several studies do find a relationship, further research is required, as Slaughter (2007:333–34) points out. At the same time there has been a change in the social pacts that were characteristic of the welfare state's golden era. What Ruggie (1982) termed 'embedded liberalism' has long been under dissolution (Glyn, 2006; Lash & Urry, 1987; Offe, 1985) or, as Streeck (2009:193) argues, is increasingly characterised by 'much more liberalism and much less embeddedness than the postwar configuration Ruggie had described'. The worker's altered power position on the labour market provides part of the explanation for this change (Rodrik, 1997:4-5). At the same time, the general discourse on globalisation prescribes restrictions on labour rights and the welfare state in order to sustain competitiveness in the globalised economy (Hay, 2006:2).

This article starts by defining offshoring and then presents some theoretical aspects of the international division of labour and trade unions. The next section first presents the results from the case study of Danish slaughterhouses, and then analyses developments in the German slaughterhouse industry, arguing that European integration and declining trade-union impact have been the main drivers of the rapid increase in precarious jobs and subcontracted agency work. There follows a short discussion of the implications for the welfare state before the paper's findings are summed up.

The international division of labour and offshoring

International economic integration is driven as much by foreign direct investments (FDI) and overseas production as by trade, with the total value of foreign production being greater than total global trade (Hirst, Thompson & Bromley, 2009:198). International production is by no means new, but it has received growing attention in recent decades. In particular, the

[4] See, for example, Banyuls & Haipeter (2010) for evidence from the motor industry.

increasing international fragmentation of production processes, and thus the growth in an international division of labour, is often paramount in contemporary analyses of capitalist development. Multinational enterprises (MNEs) play an essential role in FDI, production abroad and intra-firm trade and thus in economic globalisation per se. Foreign production can take several different forms, including international outsourcing, joint ventures, franchises and offshoring to affiliates. This creates some terminological and methodological problems, especially with the terms 'offshoring' and 'outsourcing' which are often used imprecisely[5]. In this article, 'outsourcing' is the process of externalising work previously performed within the company, which can be national or international; 'offshoring' refers to moving the work out of the country, where it is either performed within the company, e.g. in affiliates, or subcontracted to external partners(Feenstra & Hanson, 1996; Feenstra, 2010) . In the case study under discussion, the offshoring from Danish slaughterhouses is only carried out in-house, to affiliates in Germany and Poland, although the use of agency workers is a somewhat distinctive way of organising production. This is elaborated later in the article.There are major measurement problems with offshoring and outsourcing because no regular valid data are collected, and national economic statistical material does not provide information that reflects the complex structures of production in modern capitalism (Sturgeon & Gereffi, 2009). Macro-analysis of offshoring therefore often encounters significant problems with operationalisation. The effects of offshoring are also contingent on national institutions (Swank, 2002), which means that empirical findings diverge greatly (Crinó, 2009:234). A case study research design, as applied in this article, therefore seems more promising in revealing the causal dynamics between economic globalisation and industrial and management relations.

Even though economic integration and international offshoring have increased rapidly, especially in recent decades, the overall job impacts are still modest (Refslund & Goul Andersen, 2012a; 2012b). Approximately 5,000 jobs are moved abroad from Denmark each year and the number seems to be increasing, especially within production (Thelle, Jespersen & Sunesen, 2011:40). These numbers must, however, be seen as part of an

[5] See (Refslund & Goul Andersen, 2012a, b) for further elaboration

annual job turnover of approximately 150–200,000 jobs in the private sector alone (Refslund & Goul Andersen, 2012a; 2012b). At the same time, the international division of labour is a two-way street, with jobs being generated in the Danish economy as well as being relocated back to Denmark. But the net job effect is presumed to be negative, at least for the Danish economy. This implies that the impacts from offshoring might be more qualitative than quantitative, in line with this article's findings.

Offshoring and trade unions

There are many theoretical propositions about how trade unions respond to the challenges of economic globalisation. One argument claims that the existence of strong unions and centralised wage bargaining could increase offshoring, since it increases the enterprise's incentives to relocate jobs away from less flexible work agreements and higher wages. But this does not seem to be supported by empirical data: no connection between the degree of unionisation and offshoring has been found. Countries like Ireland and the UK, characterised by low rates of collective agreements and high wage dispersion, seem to offshore at least as much as, for instance, Sweden, which has a centralised and strongly regulated labour market (Lommerud, Meland & Straume, 2009:109-110). On the other hand, Lommerud, Meland & Straume (2009:109) argue that strong unions might prevent offshoring. But when the gains from offshoring are high enough, this does not seem realistic, as shown in this article. In a Danish survey, only 4% of companies indicated that concerns among unions and employees were an important obstacle to offshoring (Statistics Denmark, 2008). What seems more plausible is that trade unions can influence the decision when the gains from offshoring are minor or ambiguous. Moreover, trade unions can lessen the incentive to offshore through a consensus-seeking approach in which optimising and improving production is perceived as a common objective (Streeck, 2005:172-173). A consensus approach has been a longstanding feature of the Danish industrial relations system (see, for instance, Galenson, 1952; Jensen, 2007), and seems to persist (Nielsen et al., 2011). Another theoretical argument is that a compressed wage structure, a result of strong unions, provides a competitive advantage, in that the most productive firms pay wages that are below market levels, while companies that perform below par pay wages that are too high and therefore swiftly lose ground. Thus, a compressed wage structure helps preserve competitiveness by providing highly productive companies with better conditions and accelerates a dynamic structural adjustment, causing the weaker companies to disappear (Øverbye, 2010:414).

Globalisation and the Danish slaughtering industry

Even though pigs and globalisation might not seem to be very much connected, the analysis of Danish slaughterhouses[6] may not be that atypical, since it shows that increased international competition and production may have parallel effects in other, diverse, parts of the economy. This case study also shows that regional development, European legislation and integration, together with European Court of Justice (ECJ) rulings, are creating a highly precarious German slaughtering industry that functions de facto as a source of low-wage labour just south of the Danish border. Intra-European offshoring already represents the lion's share of Danish offshoring, according to research results (Statistics Denmark, 2008) that contrast the role of intra-EU job relocation with traditional assumptions, partly exaggerated, of Chinese prominence in the international division of labour. These assumptions have included the presumption that offshored tasks are most often low-skilled, thus causing greater risks of unemployment and/or lower wages for low-skilled workers in the domestic economy[7]. In that sense the slaughterhouses provides a pertinent case, since there is a large share of low-skilled labour in this industry. Danish slaughterhouses have been known for their strong collective agreements and almost total trade union membership, so the case study serves as a crucial case design (Gerring, 2007:89). If globalisation can alter labour relations in this sector, it might have strong effects in other sectors as well. Therefore the findings on Danish slaughterhouses could help contribute to a more general understanding of the dynamics of contemporary globalisation.

This analysis builds on interviews with trade unionists, business representatives, firms and political actors in Denmark, Germany and at the

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[6] Only pig slaughterhouses are included in the analysis, since they make up the great majority of slaughterhouses in Denmark.

[7] There has recently been a rise in offshoring of more advanced tasks and services (Blinder, 2006; Baldwin, 2006)

EU level, as well as on data from various statistical sources (e.g. Statistics Denmark; OECD), company and government documents, and academic literature.

From farmers' cooperatives to multinationals

The pork industry has witnessed, especially since 2000, ever-increasing international competition from rising exports from countries like Canada and Brazil. This development has placed a growing emphasis on cost reduction, especially wages, and increased concentration and centralisation in the industry (Hamann, 2006; 2010). At the same time, retail food chains have become increasingly multinational, claiming very large market shares (Strandskov, 2011:731). This gives retailers like Carrefour and Lidl in Europe and Wal-mart in the USA a very strong negotiating position from which to pressure slaughterhouses to lower their product costs. A large share of retail sales is under private labels for chains, and slaughterhouses can acquire a strong competitive advantage through negotiating more permanent agreements with the larger chains (Hamann, 2010:37–39). The slaughterhouses are thus encouraged to expand their activities in order to match the enlargement of the retail chains, which has caused a general growth in the size and scope of slaughterhouses.

The Danish pork industry has been at the forefront of this trend, developing what is probably the most modernised and centralised production structure in the world. While in 1960 there were over 80 independent slaughterhouses organised as farmers' cooperatives, today only two companies remain, of which the Danish Crown Corporation[8] is the major actor, with a global turnover of nearly 52 billion Danish kroners (€7 billion), around 100 affiliates and 23,500 employees worldwide, making it one of the world's largest pork producers. Danish Crown's paramount role makes it possible for this analysis to focus solely on offshoring by Danish Crown[9]. Since 2005 the company has terminated around 6,000 Danish jobs[10] as part of its international strategy focused on growth through acquisitions, efficiency

[8] Still basically organised as a cooperative.
[9] Offshoring from other Danish slaughterhouses has been minor (Refslund, 2011).
[10] Total Danish slaughterhouse jobs diminished from 14,000 to approximately 7,500 (Refslund, 2011)

gains and cost reductions, including job relocation (Danish Crown Annual Report, 2004:3). In the same period around 15 production sites in Denmark were closed. Some 1,500–2,000 relocated jobs have gone mainly to Germany, but some have also gone to Poland. The remaining decline in employment is explained by productivity gains, for instance as a result of new technologies, increasing automation and the recent introduction of carcass-splitting robotics (Hamann, 2009:49), and, to a lesser degree, because of changes in pig production[11]. The pork industry has traditionally played an important role in the Danish economy, and Denmark was for years the world's largest exporter, making pork one of the top-selling Danish export goods. Over 90% of Danish Crown's production is sold outside Denmark, with England and Germany as the traditional top markets, but with Japan also providing an important market, and a rapid growth in exports to China.

The savage slaughterhouse workers

Industrial relations (IR) in the Nordic countries, and especially in Denmark, are traditionally perceived as comparatively consensus-oriented (Galenson, 1952; Dølvik, 2006; Gustavsen, 2007). Danish labour disputes usually relate to collective agreement renewals and the 'peace obligation' is in general respected (Jensen, 2007:126-28), though historically Danish slaughterhouse workers have diverged markedly from this consensus approach. In the past, they had a well-earned reputation for bringing production to a standstill even over minor disputes, with wildcat strikes notoriously frequent (Due & Madsen, 2004:37). These labour relations partly reflect working conditions in the industry. Slaughterhouse work can be described as a text-book example of taylorised work in a Danish context (Hasle & Møller, 2007:402; Kristensen, 1994:30), and the official Danish Working Environment Authority rates slaughterhouse work in the lowest safety category (Burr, 2006) because the industry has the most work injuries of all industries (Danish Working Environment Authority, 2010:14), even though this has improved significantly in recent years. These working conditions gave rise to antagonistic relations between workers and management (Kristensen,

[11] Many Danish pigs are bred and slaughtered in Germany, which is due to strong German competition in these areas. This also illustrates changing international patterns of production

1994:56), with many disputes over everyday problems of working and production conditions. NNF (the slaughterhouse workers' union) was traditionally very strong, organising nearly 100% of slaughterhouse workers. Even though the sector has changed, virtually all slaughterhouse workers are still organised today.

The structural conditions in the industry also gave slaughterhouse workers a favourable strike position since often there were no alternatives for processing the animals discarded from strike-afflicted slaughterhouses (expect by strike-breaking, of which Denmark has very little tradition). Industrial relations have, however, changed dramatically in recent years. What has been the main driver in this development? The following sections show how offshoring and the threat of further job relocations have had a significant disciplinary effect on the previously so-savage slaughterhouse workers.

Offshoring of Danish slaughterhouse jobs: causes and effects

The motives behind specific production relocations are often complex; they can both reinforce each other and create spillovers (Dunning & Lundan, 2008; Feenstra, 2010; Jensen & Pedersen, 2011; Eriksson, Ibsen, Li & Westergård-Nielsen, 2006). But two motives are paramount in most contemporary offshoring: access to markets and cost reduction. These motives greatly affect choices of destination, with market access geographically defined and low-wage countries attracting cost-driven relocation. Danish Crown has expanded its foreign activity, concentrating on markets as well as cost reduction[12]. Only the effects of cost-driven foreign activity are analysed here, with the emphasis on the impact of offshoring. Since the turn of the millennium, Danish Crown has had an explicit internationalisation strategy of production-cost reduction through offshoring tasks from Denmark, especially labour- and wage-intensive tasks like carcass deboning, slicing and cutting (Strandskov, 2011:748). The firm's cost-reduction motive was clear all along:

[12] Obviously it can be difficult to distinguish the different objectives, especially in export sectors, where at least some production could be exported instead of being produced abroad.

Lower wage and production costs as well as greater flexibility were ten years ago the motives for moving production to Germany. (Danish Crown, 2012)[13]

In 2003, Danish Crown bought a deboning factory in Boizenburg, Germany and moved some deboning processes there (Danish Crown Annual Report, 2003:11). A few years later another production site was acquired in Oldenburg and consequently three Danish sites were closed and production moved to Germany. Danish Crown has also acquired a production site in Kolo, Poland[14]. A number of Danish site closures were due directly to these relocations. The Danish sites are still cost-competitive for slaughtering, which, together with the high Danish veterinary standards[15], explains why a large share of slaughtering is still based in Denmark (Hamann, 2009:26–28). Much of the meat processed in Boizenburg, Oldenburg and Kolo is Danish.

The numerical relationship between offshoring and site closures is rarely one to one: as Danish Crown closed three smaller Danish deboning sites in 2007 and moved deboning to Poland, they accomplished an efficiency gain at the same time, so fewer jobs were created in Poland than were lost in Denmark. But offshoring also has an indirect job effect, often underestimated, partly because it is not captured by official statistics. Examples of indirect slaughterhouse job loss can be found in administration, cleaning, maintenance, transport and in local suppliers. These are not included in estimates of job losses here partly because they are very difficult to capture. An overall estimate is that 1,500–2,000 Danish slaughterhouse jobs were lost by offshoring to Germany and Poland[16]. This only comprises tasks

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[13] Danish Crown homepage Accessed April 14 2012 from: http://www.danishcrown.dk/Nyheder-Presse/Nyhedsarkiv/Nyheder-2012/DC-fejrer-10-aar-i-Oldenburg.aspx

[14] In 2010 Danish Crown bought the fourth largest German slaughterhouse, D&S Fleisch, in Essen, now called DC Fleisch. But to date no activities have been offshored to Essen

[15] Danish pork has the highest official authorisation in Japan in contrast to Germany and Poland; if Germany or Poland would receive the higher authorisation, more Danish activities could potentially be offshored.

[16] A small number of jobs have been offshored to the UK, which also has lower production costs. But this been driven by practical reasons rather than strategic cost reductions, and is therefore not included in this analysis.

previously done in Denmark[17]. Danish Crown's motive, to reduce production costs, was achieved. The widespread use of mainly Eastern-European subcontracted workers in the German meat industry, to be scrutinised below, has de facto turned Germany into a low-wage country, in this sector at least. Industry assessments are that German hourly average production costs are not more than half of the Danish ones, if not even less, and that productivity differences are insignificant (see, for example, Hamann, 2009:38). There have been reports of subcontracted workers earning as little as three euros per hour, although it is likely that the average is somewhat higher than this.

Changing industrial relations

Another motive for offshoring by Danish Crown was a desire to weaken the comparatively strong negotiating position of NNF (the Danish slaughterhouse workers' union) as well as reducing the strike rate. Though never articulated, this was rather obvious from interviews:

We know that things are sent to Germany and Poland already, and if we don't control our expenses - as for example strikes, then the work will disappear. That's what they tell us all the time (...) Globalization does not go away… (Slaughterhouse Worker, Danish Crown, quoted in Hansen, 2005:11)

The threat of offshoring can be used by management in discussions with the union about wages and general organisational questions such as working hours (Davidson & Matusz, 2008:17; Slaughter, 2007:334-35; Doellgast & Greer, 2007:70). On several such occasions, Danish Crown has threatened to relocate jobs if Danish wages are not lowered. When this was not achieved, numerous jobs were relocated as a direct consequence.

Even when jobs are not moved, offshoring can still have adverse effects on workers by creating downward pressure on wages (Flecker, 2010:18; Grossman & Rossi-Hansberg, 2008), especially in tradable parts of the economy which face potential job losses (Oesch, 2010:41). Danish slaughterhouse workers have on several occasions faced this trade-off between jobs or lower wages. The first clear-cut manifestation of this took

[17] See Refslund, 2011 for further elaboration.

place in 2004 when workers at the Danish Crown affiliate Tulip in Ringsted were confronted by management with the proposition that they accept a 15% wage reduction or else production would be moved to Germany and Poland. At first, the local slaughterhouse workers were ready to accept the wage reduction, but this gave rise to numerous national protests among slaughterhouse workers who feared this type of agreement would spread (FAOS, 2004:16). The issue also attracted significant national attention, creating the fear that major wage cuts to preserve jobs would be legitimised and create pressure for wage cuts in other sectors, especially services (Andersen, 2005:7–8). So the Danish trade union confederation took a strong interest in maintaining wage levels in slaughterhouses even in the face of increased job offshoring. Ultimately this national pressure led Tulip to withdraw from the negotiations, move most of their production from Ringsted to Germany and later close down all production in Ringsted. There was a similar situation in the collective bargaining negotiations of 2010 when Danish Crown wanted a 10% wage reduction in lieu of further offshoring (Ibsen & Andersen, 2010). Once more the trade-off between wages and safeguarding jobs was highly apparent. During these negotiations, Danish Crown was accused of failing to pay subcontracted Romanian workers the agreed wage at their Oldenburg site (Strandskov, 2011:749). Danish slaughterhouse shop stewards stated:

We cannot accept that Danish Crown on the one hand uses underpaid labour abroad and on the other is trying to pull our wages down (...) under the threat that our jobs too will go abroad and be taken by Romanian labourers if we do not toe the line. (quoted in Strandskov, 2011:749)

Subcontracted offshore workers were thus drawn directly into a Danish industrial dispute. As the union would not accept a wage reduction, the sector was included in the conciliation round of collective bargaining, which traditionally means that the general wage trend from the production and transport sectors is adopted directly (Due & Madsen, 2010:18). Danish Crown declared that the failure to reduce wages had such severe consequences for its competitiveness, especially with German slaughterhouses, that it was reducing employment by nearly 600 jobs in Denmark (Ibsen & Andersen, 2010). Recently workers at the Hadsund slaughterhouse faced the same trade-off: Danish Crown wanted a new and cheaper wage deal when moving to a newer production site near the old one, but once again the slaughterhouse workers refused and production was then moved to other company sites, with over 100 workers made redundant.

Danish slaughterhouse workers have thus several times faced the choice between jobs and offshoring, but in all cases the workers (or their union) have refused wage cuts. The result has been job losses of 1,500–2,000 directly attributable to offshoring and the number of Danish slaughterhouse workers has nearly halved since 2000. Could slaughterhouse jobs be safeguarded in the long term if the workers accept wage cuts? This is probably doubtful considering the large wage differences between Germany and Denmark. The loss of Danish jobs has not caused significant employment problems either nationally or locally in areas highly affected by slaughterhouse closures. This is explained by the flexible Danish labour market and encompassing welfare schemes that cushion redundancy effects and provide for large-scale reskilling and requalification (Refslund & Goul Andersen, 2012b). This pattern has also been confirmed in an analysis of earlier offshoring experiences in the previously labour-intensive Danish clothing industry (Olsen, Ibsen & Westergaard-Nielsen, 2004) and in Danish shipyards (Poulsen & Sornn-Friese, 2011).

Bargaining power is shaped by the credibility of options such as relocation of production or strikes (Dumont, Rayp & Willemé, 2006). Danish Crown has succeeded in tipping the balance of power in its own favour because the threat of offshoring is very tangible and has weakened the effects of strikes. Data from the Confederation of Danish Industry confirm that wildcat strikes have been more or less eliminated in the industry, down from more than 7,000 lost work-days in the early 2000s to a low of 291 days in 2010. This decline started with the Ringsted site offshoring in 2004[18]. A high of over 22,000 lost work-days in 2004 requires comment. That year, major industrial conflicts occurred, related to collective bargaining and the events in Ringsted (Due & Madsen, 2004:37). Besides offshoring, the main theme of the strikes

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[18] It is ambiguous whether the strike function is under pressure in the overall Danish labour market. Denmark had the most days lost per worker due to strikes in the EU between 2005 and 2009 (Carley, 2010:12), but this was largely due to a major public sector conflict in 2008. This can give rise to a split between the tradable and non-tradable sectors, especially the public sector, with strikes declining in the tradable sectors but persisting in the public sector.

was so called 'mistreated work'. The national social partners – the Confederation of Danish Industry (DI) and the industrial trade union cartel (CO-Industry) – had agreed that overtime work caused by unauthorised strike action, called 'mistreated time', would no longer trigger overtime pay. NNF refused fiercely to accept this (Due & Madsen, 2004:37). Frequent work stoppages in the slaughterhouses traditionally meant overtime work, so the slaughterhouse workers could, in that sense, strike at the employer's expense. Ultimately NNF's demands were overruled by the trade union confederation (LO) in central bargaining. This abolition of 'mistreated time' had a significant effect on slaughterhouse strike rates, but it only explains part of the decline in strike rates. Another reason for the decline, though less significant than offshoring, is the proportion of foreign workers, many of whom, including Europeans, are not familiar with the Danish IR system where strikes are integrated and fully accepted, nor do they have similar organisational traditions. In several Danish slaughterhouses up to 20% of the workforce is of foreign background.

Conclusions from the case study

This case study, like previous research (Hansen, 2005), demonstrates that offshoring has had a strong disciplinary effect on Danish slaughterhouse workers and contributed to significant numerical declines in Danish slaughterhouse jobs. As well as cost reductions, Danish Crown aimed at reducing NNF's power and influence on production, and this strategy has been notably successful in eliminating wildcat strikes.

Despite important changes in the power configuration, Danish slaughterhouse workers have not seen a significant drop in wages: in the choice between jobs and wages they have been able to choose wages, but at the expense of jobs. The strong, centralised wage-bargaining tradition in Denmark helps explain this. Danish Crown has always accepted the industrial relations system, including the centralised voluntary conciliation system, which implies that wage levels in other, comparable areas are adopted directly (Due & Madsen, 2010:18). Because most wages and working conditions are agreed centrally between unions and employers' organisations, and not negotiated with single employers, it is very difficult for Danish Crown to achieve substantial wage cuts via collective agreements. So the threat of relocation versus wage reductions is shared by all slaughterhouse workers and, indirectly, by the rest of the Danish labour market, which significantly reduces incentives to accept wage cuts. The case of 'mistreated work' confirms the strength of the central actors: a sectoral union can be overruled by the trade union confederation. Overall, the Danish IR system, with strong unions and highly-coordinated industrial relations, largely explains why Danish slaughterhouse workers are not exposed to the same trends as their counterparts in Germany. But, despite the strength of the Danish system, it has not been able to prevent offshoring: if the potential gains are great enough, trade unions cannot influence decisions on offshoring.

The rise of subcontracted and precarious labour in German slaughterhouses

The changing power relations in Danish slaughterhouses can largely be explained by developments in the German pork sector which have in turn been strongly influenced by deepened European integration and legislation, combined with rulings from the European Court of Justice (ECJ), like the Rüffert, Laval and Viking rulings (See Bücker & Warneck, 2010 for an overview). In the international division of labour the role of China and other Asian low-wage countries has often been emphasised, but the slaughterhouse case shows that offshoring also takes place between countries with more similar political and economic systems. The local context is highly decisive for the choice of offshoring destinations (Jensen & Pedersen, 2011), as when lower German production costs proved so attractive for Danish Crown.

The extensive use of subcontracted, mainly East-European, workers in the German pork industry has reduced production costs to below half the Danish level, but this has caused a great increase in precarious, low-wage jobs with poor working conditions in the German locations. Strandskov, Kristensen and Kristensen found in 1996 that slaughterhouse wages were roughly equivalent in Germany and Denmark. Since then, wages have developed in opposite directions in these countries: while Danish wages have grown steadily, the German real-wage level has fallen. The use of subcontracted workers, and the pressure this creates on the wage level of German slaughterhouse workers is the main explanation. According to official statistics, employment in German slaughterhouses dropped from 107,000 in 1998 to 85,000 in 2007. But according to the German Food, Beverages and Catering Union (NGG) over 300,000 people work in German slaughterhouses, with the overwhelming majority subcontracted workers, typically from Eastern Europe (Hamann, 2009:31).

The subcontracted workers are hired by the slaughterhouse companies through agencies based outside Germany, e.g. in Poland or Ireland. The agencies then assume the responsibilities of an employer, since the workers are not employed directly by the slaughterhouse, even though the actual work is conducted in the slaughterhouses. The slaughterhouse company thus avoids paying social insurance contributions (in Germany 20% of wages) and dealing with the issues of working hours and environment, supervision and absenteeism (Hamann, 2010:52). The slaughterhouse companies can also disclaim responsibility for wage levels since that is agreed between the agency and the subcontracted worker. The majority of employees in the largest German slaughter companies are subcontracted. Estimates of the numbers of workers actually employed by the largest slaughterhouses are: Vion 50%, Westfleisch 15%, and Danish Crown and Tönnies below 10%[19]. Thus only a few employees, overseeing such functions as quality control, administration and management, are actually directly employed by the slaughter company.

Most of the subcontracted workers are migrant East-Europeans who return to their home country after a period. They are basically unorganised and therefore seldom complain about wages or working conditions, and the unions face great difficulties in organising them. Subcontracted workers often have no such tradition of labour organisation in their home country and are therefore sceptical about unions. In addition, though the wage levels are low, they are still higher than in Romania, for example; this also weakens the incentive to organise. Finally, some slaughterhouses have a negative attitude towards unions and workers who want to organise. There have been a few incidences of subcontracted workers protesting against poor working conditions and missed pay. In 2009 Romanian workers complained that Danish Crown failed to pay them as promised at their plant in Oldenburg

[19] These estimates are based on the author's interview data, and have been confirmed both by trade union representatives and by employers.

(Strandskov, 2011:749). And in 2006 a former Danish Crown[20] employment agent was sentenced to jail for one year and fined 500,000 euros for hiring undocumented workers.

Calls for higher wages by Polish workers led to slaughterhouse companies recruiting Romanian and Ukrainian labour instead. Many Poles then moved on, for example, to Ireland or England. The most recent development is that the German slaughterhouse, Tönnies, has subcontracted work to Indian and Pakistani workers.

European integration and deteriorating industrial relations in German slaughterhouses

What, then, has made subcontracted and unorganised labour possible and widespread in the German labour market, one that has traditionally been perceived as a highly coordinated market economy (Hall & Soskice, 2001; Thelen, 1991)? In several German sectors, especially where unions are strong, the wage level is still around the Danish level (Joebges et al., 2008:2), so the slaughterhouse industry differs significantly from the German norm[21]. Two analogous explanations are emphasised here: the long-term dwindling of the German trade unions, and the increasing impact of European integration on industrial relations.

European legislation, especially the Service Directive and the Posted Workers Directive (PWD), combined with various rulings from the European Court of Justice (ECJ), have significantly affected German industrial relations. PWD and the Rüffert verdict state that national labour regulations, in particular regarding wages, only apply to posted workers if they are based on national legislation or nationwide collective agreements; otherwise the labour-market regulations of the posting country are applied (Bücker & Warneck, 2010:11). Since there is no minimum wage law in

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20 Danish Crown was not directly involved in the case.

21 But the undermining of employment systems and falling wages are evident in general in Germany (Lehndorff, Bosch, Haipeter & Latniak, 2009) as well as in specific sectors like the motor industry (Banyuls & Haipeter, 2010).

Germany,[22] and the unions don't have the strength to force slaughterhouse employers to negotiate collective agreements, then slaughterhouse workers cannot demand a minimum wage or take industrial action against subcontracting agencies[23]. So the labour market rules of the posting company's homeland are applied, which is often East-European or a country, like Ireland, with lower labour market standards. Thus European legislation is highly influential in matters of wage levels and the growing field of worker subcontracting. Industrial relations have traditionally been perceived as a purely domestic affair with regard to European integration, but these developments provide evidence that this understanding is mistaken.

The second major explanation is the decline of German trade unions in terms of membership and collective bargaining coverage (Doellgast & Greer, 2007; Hassel, 1999). German union membership is below 25%, while in Denmark it is around 67% (Ibsen, Høgedahl & Scheuer, 2012:77). In 2009, 61% of German workers were covered by collective agreements, as compared to 83% in Denmark in 2007 (EIRO-online, 2009). Multinational enterprises often adjust to national IR systems, as when local management is put in charge of labour relations (Dunning & Lundan, 2008; Edwards, 2005:271). Accordingly, Danish Crown has no collective agreements in Germany, which is the general case in German slaughterhouse companies.

The increasing importance of European legislation and the weakening of German trade unions together explain the rise of precarious, subcontracted work in German slaughterhouses. These findings therefore emphasise the role of European integration in shaping IR and national labour conditions.

Implications for the welfare state?

Changes in the production structure, such as offshoring and the changing international division of labour, are transforming the social foundations of welfare states as well as the relationship between labour and capital which can be ascribed a central role in the development of the welfare state (Esping-Andersen, 1985; Huber and Stephens, 2001; Korpi, 1983, 2006;

22 Not yet, at least. This has been heavily debated in German political discussions in recent years.
23 As the Viking and Laval rulings show.

Pierson, 2011). Thus an erosion of organised labour relations – mainly of the employees' but also of the employers' position – could lead to considerable changes in the welfare state. Further declining wage rates, especially for the low-skilled (who constitute a large proportion of slaughterhouse workers) could put downward pressure on the comparatively generous level of Danish unemployment and other benefits, since the difference between benefits and income from low-waged jobs would narrow.

The coordinated Danish and Nordic wage formation system has shaped a more egalitarian and compressed wage structure compared to other welfare regimes (Moene & Wallerstein, 2008; Pontusson, 2005), but workers threatened by offshoring are often inclined to accept wage cuts to preserve their jobs (Oesch, 2010:41). This has not happened thus far in Denmark, which can be seen as a triumph for the agreement-based, centralised Danish IR system, with little or no state interference. But the Danish voluntary system is based on the strength of the social partners, which is fundamentally dependent on membership rates. If these decline, especially for labour[24], or the social partners are weakened in other ways, then the odds of wage reduction being accepted in return for job safeguards would most likely increase. A deterioration of the IR system would also increase the likelihood of extensive use of subcontracted or agency workers in Denmark.

Wage reductions will improve international competitiveness in the short run, but the long-term consequences for competitiveness are more uncertain. And, since wage levels are significantly lower in Germany, it seems quite unrealistic to consider adjusting Danish slaughterhouse wages. The employment effects of comparatively high wages are much more ambiguous than appearances often suggest, and especially as economic theory predicts, and are contingent on many different aspects of production structures, not just wages (Glyn, 2006:120–21). This is supported by studies concluding that high welfare benefits and wages do not reduce employment among the low-skilled (Goul Andersen, 2006:27; Kenworthy, 2003:1201). An overall reduction of wages in tradable industries is likely to increase wage differences, whereas the employment effects are less certain.

24 There have been tendencies towards declining memberships, as well as a growth in 'alternative' trade unions in recent years (Ibsen, Høgedahl & Scheuer, 2012).

Conclusions

This article has pointed to some important findings with implications far beyond the particular case of Danish slaughterhouse workers. These results underline the importance of European integration, which is increasingly dictating national labour and management relations, something often overlooked in the literature. European legislation and rulings from the ECJ have a substantial impact on national labour markets, as this case study shows. In the ever-more integrated European economy, labour relations in one country strongly affect the surrounding countries, as when German developments significantly impact power relations in Danish slaughterhouses. The pressure created by offshoring and the continued threat of offshoring has weakened the Danish slaughterhouse-workers' union significantly. So the claim that globalisation weakens workers' position is confirmed at the sector level. Danish slaughterhouse workers have thus far avoided major wage reductions because of their strong bargaining power and the centralised Danish collective agreement system, which shows that strong trade unions can adjust to global pressures. But this has been at the expense of Danish slaughterhouse jobs which have more or less halved since the turn of the millennium. This also shows that if the gains from offshoring are clear and large then not even very strong and highly-organised unions can prevent it. Globalisation thus creates wage pressures and the potential for losing either wages or jobs. Declining wages of low-skilled workers, in export-oriented sectors especially, can create downward pressure on welfare-state generosity, since the gap between wages and welfare provision will then narrow.

The dynamics of changing labour relations also have implications for European social policy, as the experience of the German pork industry shows. The large rise in the precarious subcontracted labour of migrant workers, particularly East Europeans, means poor working conditions, low wages, no collective bargaining and, in general, vast organisational problems. The literature on offshore outsourcing has paid considerable attention to low-wage countries and especially China's role. But, as seen in this case, regional integration, as well as European legislation, can also affect labour relations. Here the picture is much more complicated as regional relations and differences play an increasingly important role.

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ARTIKEL II - GLOBALISERING OG INTERNATIONAL INTEGRATION AF PRODUKTION – DANSK ØKONOMI I EN VÆRDIKÆDEANALYSE*

af

Bjarke Refslund

Resumé

Globaliseringsbegrebet bruges ikke blot som buzz-ord i den politiske diskurs, også i videnskaben er det ofte et løst og usammenhængende begreb, som ofte hænger fast i en forældet forståelse af den internationale økonomi. Denne artikel præsenterer en Global Value Chain (GVC) tilgang til den stigende internationale økonomiske integration og interaktion. GVC-perspektivet giver en dybere analytisk forståelse af de store omvæltninger i den internationale arbejdsdeling. Især produktionsnetværk er blevet mere globale, hvilket resulterer i stigende handel med halvfabrikater, outsourcing/offshoring samt deraf følgende konkurrencepres på arbejdere, virksomheder og nationalstater. GVC-begrebet tillægges derfor stigende betydning i policyanalyser fra f.eks. OECD, Europa-kommissionen, WTO og FN. Efter en konceptuel diskussion af globaliseringen og GVC-begrebet i artiklens første del belyses dansk økonomi og konkurrenceevne i den mere integrerede internationale økonomi i artiklens anden halvdel.

Abstract

Today, only few goods and services are made exclusively within a single country and production chains often span several countries and continents, leaving much statistics as well as analytical approaches to economic

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globalisation locked in outdated understandings of global production and trade. International production is increasingly functionally integrated and spread across borders, with trade also integrating. To provide an analytical approach to the global economy that captures some of the major ongoing changes especially within modes of production, offshoring, outsourcing and intra-firm activities this article presents a Global Value Chain (GVC) approach to the broader developments in the modern economy. The changing international division of labour has profound impact on the foundations of the nation states, e.g. through competitiveness, industrial structure and job creation. The first part of the article discusses these ongoing changes in the global economy from a GVC-approach, whereas the second discusses the position of the Danish economy in an increasingly integrated and yet fragmented global economy.

Introduktion

Globaliseringsbegrebet er et af de mest anvendte begreber i moderne samfundsvidenskab og indgår i de fleste samfundsanalyser lige fra ministerier, medier og interesseorganisationer til akademiske analyser. Det fremstår dog ofte som en »catch-all« kategori, som rummer de fleste forandringsprocesser i det moderne samfund. For at nå frem til et analytisk og empirisk mere anvendeligt begreb præsenteres her en konkret operationalisering af globaliseringsbegrebet nemlig Global Value Chains (GVC) (Gereffi og Korzeniewicz, 1994; Gereffi, 2005, 2014). Denne artikel afgrænses til analyser af økonomisk globalisering uanfægtet globaliseringens mange dimensioner (Held o.a., 1999).

I en stadig mere integreret økonomi er der i dag meget få varer eller services, som bliver produceret indenfor et enkelt lands grænser (Kenney, 2004; Sturgeon, 2013). Produkter som Apple's Iphone er efterhånden blevet et ikonisk eksempel på en vare, der er "Made in the World" (Gereffi, 2014: 13). Iphonen samles typisk i Kina, men kun 3-4 pct.pct. af værdien er reelt skabt i Kina, hvorimod majoriteten af værditilvæksten sker i Korea, Taiwan, Tyskland, USA samt andre lande (Xing og Detert, 2010). Alligevel registreres værdien som kinesisk eksport i de nuværende handelsstatistikker. Ved at anlægge en GVC-tilgang, hvor der fokuseres på værditilvæksten fremfor handelsværdien, opnås et mere retvisende billede af den internationale økonomi.

GVC-tilgangens analytiske fokus er på internationale produktionsnetværk og den stigende handel med halvfabrikater, global arbejdsdeling, herunder outsourcing og offshoring og deraf stigende konkurrencepres på både arbejdstagere, virksomheder og nationalstater.

Artiklens første del præsenterer en konceptuel diskussion af GVC-tilgangen, mens anden del præsenterer dansk økonomis placering i denne »nye« globale arbejdsdeling og diskuterer en række empiriske implikationer deraf. Tidligere var internationalisering den centrale betegnelse for de processer, der nu benævnes (økonomisk) globalisering. I det efterfølgende bruges termerne globalisering, internationalisering og stigende international økonomisk integration synonymt.

Den 'nye globalisering' og globale værdikæder

Ikke alene den politiske debat, men også mange akademiske analyser, hænger fast i en forældet forståelse af økonomisk globalisering tilbage fra 1990'erne. I den tidlige globaliseringsdebat blev globalisering forstået som en deterministisk kraft, som ville få velfærdsstater og sociale systemer til at konvergere mod laveste fællesnævner (Mishra, 1999; Ohmae, 1991). Senere og mere nuancerede analyser lagde større vægt på stigende handel, FDI osv. (Held o.a., 1999; Hirst o.a., 2009). Globaliseringsforskningen er i dag langt fra profetierne om en hyper-globaliseret verden, hvor kulturelle forskelle, staternes selvbestemmelse, forskelle mellem velfærdsstater og produktionsmåder osv. ville forsvinde, men selve forståelsen af økonomisk globalisering er ikke tilsvarende opdateret.

GVC-tilgangen ligger vægt på, at produktionsprocesser (ved produktion forstås her både vare- og serviceproduktion) gennem en øget international arbejdsdeling bliver internationalt fragmenteret og funktionel integreret sideløbende med, verdenshandlen bliver stadig mere integreret (Feenstra, 1998; Dicken, 2011; Gereffi, 2014). Det betyder fundamentale forandringer af produktionsmåder, handelsmønstre samt industri- og erhvervsstrukturen. Produktionen kan nedbrydes i delprocesser eller delfunktioner og efterfølgende standardiseres og spredes over flere geografiske områder, hvilket, sammen med den teknologiske udvikling og faldende transportpriser, indebærer, at produktionsformerne er meget mere fleksible end tidligere »fordistiske« produktionsformer. Tidligere var international produktion og handel især koncentreret om råvarer, og produktionen var typisk vertikalt organiseret i store virksomheder (Stopford og Wells, 1972).

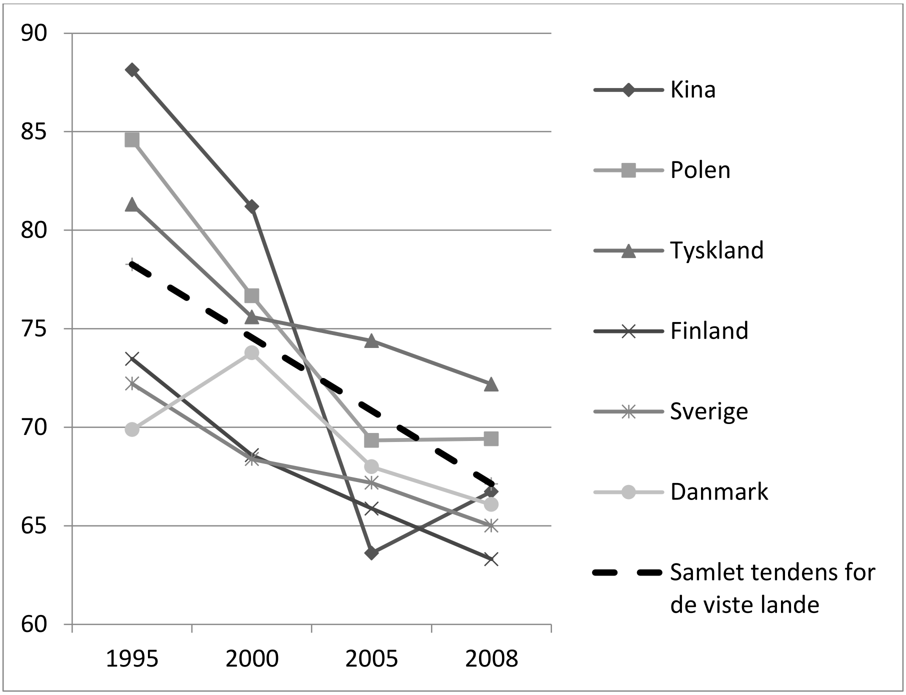
Erkendelsen af en omfattende internationale arbejdsdeling er langt fra ny (se f.eks. Fröbel o.a., 1977; Lauridsen, 1978). Det var allerede et centralt element hos klassiske politisk-økonomiske tænkere som Smith, Babbage, Ricardo og Marx. Men GVC-tilgangen betoner, at omfanget og rækkeviden af den internationale arbejdsdeling er radikalt forandret i takt med faldende transportomkostninger, politisk af- og deregulering samt ikke mindst den teknologiske udvikling. Der er således tale om en ny og mere intensiv fase i globaliseringen (Breznitz og Zysman, 2013; Gereffi, 2014), hvor produktionen er funktionelt integreret (Dicken, 2011). Dette betyder en ekstrem grad af fragmentering ikke blot af vareproduktionen, men også mange serviceerhverv samt en stigende handelsintegration. Perioden adskiller sig derved signifikant fra, hvordan økonomien tidligere var organiseret (Arndt og Kierzkowski, 2001; Baldwin, 2006; Dicken, 2011; Feenstra, 1998; Gereffi og Korzeniewicz, 1994; Gereffi, 2005; Held o.a., 1999: kap 5). Disse forandringer i produktions- og handelsmønstre er vidtrækkende og påvirker den måde, det enkelte samfund er indrettet på, især via beskæftigelse og erhvervs- og industristruktur, hvilket har konsekvenser for sociale systemer, velfærdsstater samt landenes konkurrenceevne.

The great unbundlings

For at forstå disse forandringer i den internationale økonomi taler Baldwin (Baldwin, 2012, 2006) om to store afkoblinger (unbundlings) af økonomien. Den første afkobling eller adskillelse var i midten af det 19.århundrede, hvor opfindelsen af dampmaskinen betød, at transportomkostninger faldt så meget, at produktion og forbrug kunne adskilles mere systematisk. Denne adskillelse blev endeligt gennemført med »Fordismens« masseproduktion. Den nye adskillelse, som er sket siden mid-1980'erne, er af selve produktionen. IT-revolutionen har reduceret koordineringsomkostningerne, så produktionen kan splittes både *geografisk* (offshoring eller udflytning på dansk) og *organisatorisk* (outsourcing) (Baldwin, 2012). Derudover kan der tilføjes en stigende adskillelse af finansiering og selve produktionen/handlen (Held o.a., 1999: 221; Perez, 2002). Baldwins anden »afkobling« er central i GVC-analyser af den internationale økonomi.

Adskillelsen af produktionen hænger sammen med et skift fra »fordistiske« produktionsmetoder, til »post-fordistisk« og mere fleksibel masseproduktion som Lean og Toyota-modellen. Idet produktionen kan brydes ned i delprocesser, bliver den ofte disintegreret (Harvey, 1989; se Refslund, 2012: 7-8 for en uddybende diskussion). Virksomheder kan flytte disse delprocesser rundt globalt alt efter, hvor især omkostningsniveauet, men også markedsadgang og andre produktionsmuligheder er mest fordelagtige. Samtidig kan de globale virksomheder vælte flere omkostninger, f.eks. lagerbeholdninger ved just-in-time produktion, over på lokale underleverandører, som så ofte overfører presset på medarbejderne (Raworth og Kidder, 2009). En stadig større del af værdien bliver skabt i *globale værdikæder* (OECD, 2013: 193), som ofte er styret eller domineret af store virksomheder (Refslund, 2012). Figur 1 viser den stigende integration af produktionen, hvor især vækstlande som Kina og Polen bliver inddraget i produktionskæderne via en større andel af værdien, som bliver skabt i andre lande. Men også Tyskland er gået fra, at 81 pct. af værdien var skabt i Tyskland i 1995 til 72 pct. i 2008, hvorimod faldet i de nordiske lande har været mindre, dog fra et lavere udgangspunkt.

Figur 1: National værdiskabelse i den samlede eksport 1995-2008



Kilde: OECD-stat: Trade in Value Added (TiVA) - May 2013 (aflæst 10.2.2014) (udvalgte lande, procent af samlet eksport)

Den stigende internationale integration betyder også, at den internationale konkurrence er kraftigt skærpet, idet de enkelte led i værdikæden kan konkurrence-udsættes, og teknologiske fordele hurtigere reduceres af andre producenter og lande bl.a. via værdikæden. De fleste brancher oplever således et øget pres for lavere priser og omkostninger, også brancher som tidligere var forholdsvis skærmet fra international konkurrence (Baldwin, 2006; Kenney, 2004: 8–10).

Selvom en del service ikke kan flyttes (f.eks. hårklipning), så kan utrolig meget service nedbrydes i delprocesser, ligesom meget service er tæt knyttet til produktionen (Zysman o.a., 2013), så servicefunktionerne følger med, hvis produktionen flytter. Analyser påpeger, at meget fremtidig udflytning vil være indenfor serviceerhvervene (Fernandez-Stark o.a., 2011; Dossani og Kenney, 2007). F.eks. er IT-industrien i de vestlige lande under pres på udførelsen af mere simple processer, hvor f.eks. indiske firmaer, via deres stigende udbud af veluddannet arbejdskraft, er meget konkurrencedygtige. Service har traditionelt været underestimeret i eksportstatistikkerne pga. måleproblemer (Sturgeon og Gereffi, 2009: 17–18). I mange OECD-lande står service i dag for halvdelen eller mere af værditilvæksten (OECD, 2013: 10).

Samtidig får verdens vækstøkonomier, herunder BRIK-landene, stadig større betydning, ikke kun som producenter (af stadig mere avancerede varer og services), men i stigende grad også som aftagere af endelige produkter (Breznitz og Zysman, 2013; Gereffi, 2014). Forståelsen af Kina som verdens produktionshal af primært simple varer bør erstattes af et mere nuanceret syn. Mange lavomkostnings-lande, ikke mindst Kina, er mere innovative, end det ofte fremstilles. På trods af stigende lønomkostninger er kineserne yderst konkurrencedygtige på en lang række områder f.eks. IKT-udstyr, samtidig med de flytter op i produktionskæden i stadigt flere industrier og selv offshorer dele af produktionen til f.eks. Vietnam (Breznitz og Murphree, 2013). Samtidig ender en stigende andel af værdikædetilvæksten i Kina i hvert fald for vareproduktionen (Timmer o.a., 2013: 634).

Den stigende geografiske fragmentering af produktionen (Baldwins anden unbundling) har betydet en stigende international integration både geografisk (flere lande er inddraget) og funktionelt ved at stadig flere forskellige funktioner herunder forskning og udvikling, design og logistik bliver inddraget. Lande og regioner kan specialisere sig i enkelte faser eller delprocesser og kun konkurrere i udvalgte led af produktionskæden (Breznitz, 2007; Rodrik, 2007).

Global Value Chain tilgangen

Sideløbende er en stadig mere omfangsrig GVC-litteratur vokset frem for analytisk at kunne forstå disse forandringer i den internationale økonomi[1]. GVC-tilgangen er mere en metodisk eller heuristisk tilgang fremfor en kohærent teoriramme (Gibbon o.a., 2008: 334; Sturgeon, 2009: 127). GVC-

[1] Se Bair (2009) og Lee (2010) for et overblik over litteraturen og den historiske udvikling samt http://www.globalvaluechains.org/ for et overblik over forskere og forskningsprojekter indenfor GVC-traditionen

tilgangen har akademiske rødder i flere forskellige discipliner, men det centrale udgangspunkt er den tidlige *World system*-teori, som senere udviklede sig til Global Commodity Chain (GCC) teori (Hopkins og Wallerstein, 1977,1986; Wallerstein og Hopkins, 1994)[2]. Her blev værdikæden defineret som et; »netværk af arbejds- og produktionsprocesser som resulterer i en færdig vare« (Wallerstein og Hopkins 1994: 16, oversat af forfatter). Det er netop *hele* processen langs værdikæden på tværs af forskellige firmaer og geografisk enheder, som kendetegner meget nutidig produktion (Dicken, 2011; Timmer o.a., 2013), hvilket GVC-analyser bidrager med et klart billede af.

De centrale analytiske dimensioner har traditionelt været input/output-strukturen, de enkelte led eller aktiviteters geografiske placering samt styringen eller magten (governance) i værdikæden (Gereffi, 1994: 96–97). Værdikæden kan være i et enkelt firma eller lokalt, regionalt eller internationalt, dvs. det »globale« i GVC skal ikke tages bogstaveligt, men de forskellige processer er indlejret i globale værdikæder (Sturgeon, 2009). De funktionelt integrerede produktionskæder får stadig større betydning i den internationale økonomi (Dicken, 2011). Værdikæde-tilgangen har åbenlyse analytiske fordele ved at fokusere på værditilvæksten i kæden.

Metodologien inddrager også de åbenlyse magtforskelle, der er i produktionsnetværkene, især mellem såkaldte »*Lead firms*«, der bestemmer omfanget og placeringen af produktionen, og deres mere eller mindre underordnede producenter (Gereffi o.a., 2005; Sturgeon, 2009). Governance- eller magtfordelingen er således med til at distribuere profit og risiko i produktionskæderne (Gereffi og Lee, 2012), eksempelvis har store supermarkedskæder som Tesco, Carrefour og Wal-mart enorm magt overfor deres underleverandører (Baud og Durand, 2012). Idealtypisk sondres mellem to værdikæder; »buyer-driven«, hvor store firmaer som Wal-mart eller Nike primært køber mere simple varer og delprodukter, og »producer-driven« kæder som bil- og elektronikindustrien, som er markant mere integrerede og typisk mere højteknologiske (Gereffi, 2014).

[2] En række danske forskningsmiljøer har med udgangspunkt i GCC-traditionen og økonomisk geografi bidraget med centrale forskningsresultater især Stefano Ponte og Peter Gibbon samt Niels Fold.

Multinationale virksomheder (MNV) har en stadig stigende betydning i den internationale produktion, hvilket står centralt i GVC-analyserne. Virksomheder, der spreder deres aktiviteter globalt og optimerer deres fortjeneste ved brug af underleverandører, er således en central drivkræft i globaliseringsprocessen (Kogut, 2004). En markant andel af den internationale handel foregår indenfor enkelte firmaer eller virksomhedsgrupper, enten direkte mellem MNV og deres datterselskaber eller mellem datterselskaber (Lanz og Miroudot, 2011). UNCTAD skønner at op mod 80 pct. af den globale handel i dag involverer en MNV (UNCTAD, 2013a).

Hvorvidt globalisering reelt er global eller primært regionalt diskuteres flittigt i den akademiske verden (Hirst o.a., 2009), og det samme gælder værdikædeproduktionen (Rugman o.a., 2009; Baldwin, 2012). F.eks. er autoindustrien meget regionalt baseret (Dicken, 2011: 356–365), mens elektronik- og tøjindustrien er mere globale. Overordnet foregår meget handel, også i værdikæderne, internt i Europa, Nordamerika og Sydøstasien. Det har dog nødvendigvis ikke den store betydning for den samlede analyse, idet regionalisering kan ses som det vigtigste deludtryk for stigende globalisering (Held o.a., 1999: 16).

Fra akademisk niche til centralt analysebegreb

GVC-tilgangen har bevæget sig fra en akademisk niche til en stadig mere central betydning i internationale økonomiske analyser, således inddrager både Verdensbanken, EU-kommissionen, FN, WTO og OECD værdikædebegrebet i deres analyser (se bl.a. Cattaneo o.a., 2013; OECD o.a., 2013; UNCTAD, 2013a, 2013b), ligesom stadig flere akademiske felter inkorporerer GVC i analyser; f.eks. Industrial Relations (Lakhani o.a., 2013) og arbejdsmarkedssociologi (Taylor, 2010). Branche casestudier har stået centralt GVC-tilgangen. De vigtigste brancher har været bilindustrien, tøjindustrien og elektronikindustrien samt i stigende grad servicebranchen (back-office) (Sturgeon og Memedovic, 2010: 12). Casestudierne giver væsentlige indblik i, hvordan internationaliseringsprocessen konkret udfolder sig (se f.eks. Dicken, 2011), og viser forskelle og ligheder i produktionskæderne, ligesom governance-perspektivet er blevet videreudviklet via casestudier

Et meget nært beslægtet forskningsområde er globale produktionsnetværk (Global Production Network/GPN). Her betones netværk fremfor kæder for at fremhæve kompleksiteten, ligesom den institutionelle og sociale kontekst tillægges større betydning end i den mere funktionalistiske GVC-tilgang (Coe o.a., 2008; Henderson o.a., 2002). Selvom der selvfølgelig er nuancer skelnes her ikke nærmere mellem GVC og GPN-forskningen. De to traditioner nærmere sig i øvrigt en analytisk sammensmeltning (se f.eks. særnummeret af Review of International Political Economy februar 2014), fokus her er dog på GVC-traditionen.

Selvom Gary Gereffi (2013: 21), som har været central i udviklingen af GVC-traditionen, fremhæver, at; »*Økonomisk globalisering er et sideprodukt af international produktions- og handelsnetværk organiseret af transnationale virksomheder…*« (oversat af forfatter) skal GVC-tilgangen ikke forstås som en funktionalistisk tilgang, hvor økonomisk globalisering driver globalisering i andre sfærer. Der er handlerum for både stater og andre regulatorer, såvel som arbejdstagere og forbrugere, og ikke mindst virksomheder (Bair, 2009). Men forandringerne i produktionen og den internationale økonomi har betydning for andre sfærer ikke mindst den politiske.

Value added vs. value traded – problemer med international handelsstatistik

Stort set alle varer og services er i dag produceret med input fra forskellige lande og ofte i værdikæder, der spreder sig over mange forskellige lande, hvilket betyder delkomponenter ofte krydser frem og tilbage over grænser. Derfor giver traditionelle handelsstatistikker, typisk baseret på toldoplysninger, et utilstrækkeligt billede af den internationale økonomi (Held o.a., 1999: 175; Sturgeon og Gereffi, 2009; Sturgeon, 2013). Dicken (1998: 2) opsummerer det således; »*pga. den stigende kompleksitet, hvormed produktionen er organiseret på tværs af grænser snarere end afgrænset af dem, er det enkelte produkts oprindelse vanskeligt at fastsætte…*« (oversat af forfatter). I traditionelle handelsstatistikker registreres kun den endelige handelsværdi, når produktet bliver handlet over en landegrænse. Det betyder, at den ofte meget markante værditilvækst, der er skabt af udenlandske producenter eller servicevirksomheder medregnes som skabt i eksportlandet. Derfor kan det være problematisk at tillægge den traditionelle handelsstatistik for stor betydning f.eks. i forhold til konkurrenceevne (Timmer o.a., 2013), men selv centrale mål som BNP og produktivitet bliver potentielt væsentligt mere usikre, fordi den produktion, der tillægges et land (og dermed landets BNP og produktivitet), reelt set kan være skabt i et andet land. Samtidig har de traditionelle handelsstatistikker meget svært ved at måle værdien af serviceeksporten (Sturgeon og Gereffi, 2009: 17–18), hvilket i stigende grad er et problem, fordi flere og flere serviceydelser er koblet sammen med varer (Zysman o.a., 2013). Studier viser, at servicesektoren står for en større del af værditilvæksten i vareproduktionen end de klassiske eksportmål giver udtryk for (Beltramello o.a., 2012; Timmer o.a., 2013: 621).

Derfor pågår der et paradigmeskifte i måden at opgøre værdien af den internationale produktion på, hvor man går fra værdien af den endelige vare til værditilvæksten i det enkelte produktionsled (Koopman o.a., 2010; Powers, 2012). Her er værdikæden-tilgangen relevant analytisk, fordi den fokuserer på, hvor i kæden værdien bliver skabt. En lang række forskningsprojekter bl.a. i OECD, FN og WTO har fokus på »value added« (se Refslund og Goul Andersen, 2014: 8-9 for en oversigt). Generelt baserer disse værditilvækstanalyser sig på nationale input/output (I/O) tal, hvilket dog heller ikke er uproblematisk især i forhold til service, og når tallene harmoniseres på tværs af lande og industrier (Sturgeon o.a., 2013: 290–91). Men i forhold til traditionelle handelstal giver »value added« data et markant bedre billede af den internationale økonomi, ligesom der i de nævnte forskningsprojekter arbejdes på at forbedre det statistiske grundlag for disse.

28 pct. af værdien af den samlede verdenshandel er ifølge FN's handelsorganisation UNCTAD (2013a: 4) skabt i et andet land end det endelige produkt, hvilket har stor betydning for bilaterale handelsbalancer og dermed analyser af konkurrenceevne. Ifølge OECD's »Trade in Value Added«-database forbedres den danske handelsbalance i forhold til Tyskland f.eks. med 12 mia. kr. i 2009, når man opgør værditilvæksten fremfor handlen. Dette bekræfter danske producenters placering som vigtige underleverandører i værdikæden til tyske virksomheder. Den tyske »super-konkurrenceevne« skyldes til dels et stort forbrug af importerede input til produktionen. Timmer o.a. (2013: 618, 639) peger overraskende på en forringet tysk konkurrenceevne, målt på værditilvæksten. Således giver

værditilvækstsbaserede analyser et mere nuanceret billede af konkurrenceevnen end klassiske eksporttal, f.eks. globale eksportandele, pga. det høje indhold af importerede delprodukter og services (Beltramello o.a., 2012; Timmer o.a., 2013). Derfor kan policies, f.eks. forsøg på at udpege »vinderindustrier«, begrundet i eksporttallene i værste fald være forfejlede, ligesom stærke(re) konkurrencepositioner i delprodukter eller serviceinput kan overses.

Den internationale fragmentering af produktionen og handel i komplekse værdikæder betyder også, at en traditionel Ricardiansk handelsforståelse ikke længere er tilstrækkeligt. Det er ikke »*vin for klæder mere*«, som Grossman og Rossi-Hansberg (2006) udtrykker det. Handel med halvfabrikater, intra-virksomhedshandel (herunder transfer-pricing) og dermed ufuldkomne markeder betyder, at ikke al handel er Pareto-optimal. Det betyder dog ikke, at ideen om komparative fordele samt implikationerne af frihandel er ugyldige, det er blot meget mere komplekst end meget globaliseringslitteratur antyder (Se Refslund og Goul Andersen, 2014 for en længere diskussion).

Dansk økonomi i en fragmenteret verden

Der er mange forskellige veje til succes i den internationale økonomi (Breznitz og Zysman, 2013: 390; Rodrik, 2007), hvilket afspejler sig i den fortsat store variation mellem forskellige lande og deres måde at organisere produktionen på (Whitley, 2007). National konkurrenceevne tillægges en central rolle, og mange politiske reformer har fokus på at styrke »den nationale konkurrenceevne«. Det er dog vigtigt at huske, som påpeget af Krugman (1997), at det i sidste ende er virksomhederne og ikke nationalstaterne, der konkurrerer. Offentlig service og virksomhed handler om meget mere end konkurrenceevne f.eks. pleje og omsorg. I analysen her vil virksomhederne dog stå centralt i tråd med GVC-traditionen.

Virksomhedernes evne til at udnytte globaliseringens muligheder bliver en central konkurrenceparameter. En stærk konkurrenceposition kan således hænge sammen med aktiv deltagelse i de globale værdikæder, og succesfulde internationale virksomheder udnytter de forskellige nationale og regionale styrkepositioner (Hirst o.a., 2009: 69). Og det handler ikke kun om (lav) løn, men også viden, f.eks. vindmølleproducenter der flytter til

Danmark pga. den opbyggede vindmølleekspertise. Når virksomheder flytter produktionen eller dele heraf mellem lande, er omkostningsniveauet typisk den vigtigste parameter (Danmarks Statistik, 2008; Refslund og Goul Andersen, 2014). En lang række andre faktorer spiller dog også ind og reducerer de facto virksomhedernes mobilitet. Overordnet er det en afvejning mellem reducerede produktionsomkostninger og øgede transaktionsomkostninger (Jones og Kierzkowski, 2001). Transaktionsomkostninger kan være transport, told og skat, ledelsesproblemer, koordinering, kvalitetsudsving, osv. Andre vigtige parametre er især markedsadgang, men også adgang til kvalificeret arbejdskraft og råstoffer, innovative miljøer f.eks. produktionsklynger, national regulering f.eks. miljølovgivning, osv. Til trods for internationaliseringen findes der reelt set ingen (eller meget få) virkelig globale virksomheder. Klyngefordele, transportomkostninger og forskellige kompetencers immobilitet osv. betyder, at virksomhederne ikke kan undslippe »the pull of geography« (Dicken, 2011: 69–71; Kogut, 2004). Danske virksomheder er således fortsat tæt forbundet med den danske økonomi.

Dette afsnit præsenterer først en overordnet analyse af dansk økonomi i et GVC-perspektiv, hvorefter en række andre økonomiske indikatorer, som er centrale for en mere nuanceret forståelse af økonomien, herunder betalings- og handelsbalancen, FDI samt udenlandsk ejerskab, gennemgås.

Danmark i et GVC-perspektiv

Den europæiske, og dermed dansk økonomi, bliver i stigende grad integreret i en værdikæde-produktion (Backer og Miroudot, 2013; Timmer o.a., 2013). Små økonomier har især et stort internationalt engagement, hvor større økonomier har en højere grad af nationalt input. Et GVC-mål (baseret på Koopman o.a., 2010) opnås ved, at andelen af udenlandsk input til produktionen plus andelen af eksporten, som anvendes i produktion, lægges sammen til et indeks. På dette indeks skiller Danmark sig ud ved et lidt lavere international indhold end flere af de andre små åbne økonomier (Backer og Miroudot, 2013: 12). Det er ikke markante forskelle, men lidt overraskende i lyset af forståelsen af Danmark som en meget åben økonomi. Ser man på værditilvæksten i den samlede produktion, som er skabt i udlandet (kun varer, fordi data på serviceinputtet ikke er detaljeret nok)

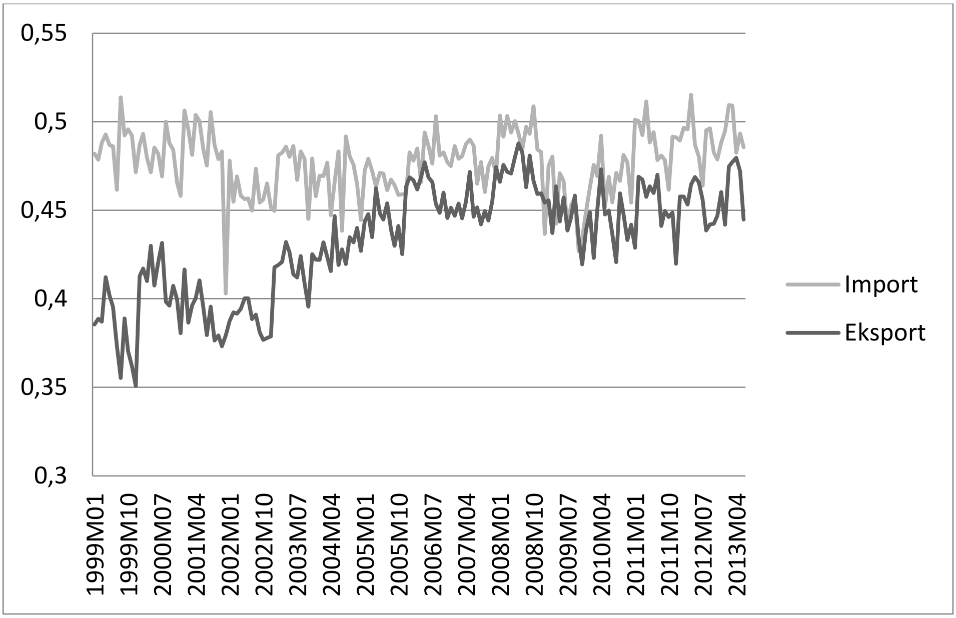
(Timmer o.a., 2013: 621–22), er billedet nogenlunde det samme, Danmark ligger i den nederste del af midterfeltet for de europæiske lande.

Handel med halvfabrikater – et simpelt mål for GVC-produktion

Et andet mere simpelt mål for GVC-produktion er selve handlen med halvfabrikater, som er defineret som input til videreproduktion f.eks. råvarer, dele, komponenter og halvfærdige varer (Feenstra, 1998). Den generelle konsensus i forskningslitteraturen er, at mere end halvdelen af varehandlen og 70 pct. af servicehandlen er halvfabrikata (Johnson og Noguera, 2012; Backer og Miroudot, 2013; UNCTAD, 2013b: xxi), og andelen af specialiserede input er stigende (Sturgeon og Memedovic, 2010: 18). Det er dog svært at kvantificere præcist, især for service, ligesom det er svært at skille GVC-relaterede produkter (tilpassede og specifikke input til f.eks. bilindustrien) fra mere generiske produkter, der ikke er værdikæde-relaterede f.eks. kartoffelstivelse eller stålplader, selvom det er input til videreproduktion (Sturgeon og Memedovic, 2010: 11). Slutteligt kan mange produkter både forbruges direkte eller i den videre produktion.

Danske tal for varehandlen i figur 2 herunder (service er udeladt grundet databegrænsninger) bekræfter den stigende betydning af internationale produktionsnetværk, hvor halvfabrikater siden årtusindeskiftet udgør en stigende andel. Halvfabrikat-andelen i dansk vareimport har været nogenlunde konstant siden 1999, mens andelen i vareeksporten er steget fra 39 pct. i 1999 til 44 pct. i 2013.

Figur 2 Halvfabrikatandelen af dansk vareimport og -eksport 1999-2013



Andelen af halvfabrikat i BEC i forhold til samlet vareimport og eksport. Kilde: Eurostat/Comext (ext_st_28msbec aflæst 1.2.2014)

Internationalt data er generelt på et meget aggregeret niveau, hvilket giver en del usikkerhed (Sturgeon og Gereffi, 2009). Der er f.eks. ofte stor diskrepans mellem Danmarks Statistiks bilateral handelstal og OECD's harmoniserede tal pga. forskellige opgørelsesmetoder. Selv på European Statistical System (ESS)-data, som er den førerende datakilde, er der inkonsistente og manglende data (Danmarks Statistik, 2013a). Så generelt bør meget statistik om økonomisk globalisering tages med et vist forbehold (Danmarks Statistik, 2013a). Overordnet synes tendenserne dog klare, men yderligere dansk forskning bør undersøge dette. Dansk data er interessant i forhold til globaliseringsdynamikkerne grundet den høje detaljeringsgrad.

Konkurrenceevne; Meget mere end eksporttal

Som tidligere påpeget er eksporttal ikke et tilstrækkeligt mål for konkurrenceevnen i en kompleks international økonomi, hvor værditilvæksten typisk bliver skabt på tværs af landegrænser. Når f.eks. en dansk virksomhed producerer og sælger i udlandet, bliver dansk handelsstatistik ikke påvirket, hvorimod den økonomiske gevinst ender i

Danmark. Den stærke tyske konkurrenceevne forklares f.eks. delvist med et stigende input fra udenlandske producenter (Timmer o.a., 2013: 618). Den tyske andel af EU27-landenes GVC-indkomst (for varer) er således faldet 11,4 pct. fra 1995 til 2008, hvor den danske til sammenligning kun er faldet 5,6 pct. i samme periode. EU12-landene er i samme periode steget med 111 pct. (Timmer o.a., 2013: 636). Til sammenligning faldt den danske andel af den globale varehandel målt ved eksporttal fra 1 pct. til 0,72 pct. i samme periode,[3] hvilket naturligvis er påvirket af andre faktorer herunder BRIK-landenes indtog på verdensmarkedet.

Handelsbalancen kan dog også bidrage med interessant overordnet viden om dansk økonomi. Både importen og eksporten har været kraftigt stigende i de seneste femogtyve år. Det er især siden slut-90'erne, at væksten er taget til. Den danske eksport af vare og tjenester nåede for først gang over 1000 mia. kr. i 2013 (Danmarks Statistik, 2014). Dansk økonomi klarer sig glimrende set på vare-og tjenestehandlen, og siden 1987 har der været overskud på handelsbalancen (Danmarks Statistik, 2013b: 37).

I forhold til »value-added« perspektivet er betalingsbalancen mere interessant end handelsbalancen, fordi betalingsbalancen i højere grad viser, hvor værditilvæksten i sidste ende akkumuleres. Input/output-baserede »value added«-analyser bygger på den antagelse, at værditilvæksten skabes og akkumuleres i det land, hvor det enkelte led i værdikæden udføres, hvilket åbenlyst ikke holder, primært fordi værditilvæksten ikke kun er lige med arbejdsindsatsen (plus de anvendte materialer), men også indeholder et profitelement, som ofte vil tilfalde det såkaldte »Lead« firma, fordi de kontrollerer den samlede produktion (Sturgeon o.a., 2013: 298). Når eksempelvis en Grundfos-pumpe bliver endeligt samlet i Kina, vil den typisk store værditilvækst i den fase, blive tillagt Kina i en input/output-analyse. Reelt ender størstedelen af værditilvæksten dog i Bjerringbro hos Grundfoss, som »Lead« firmaet i værdikæden, som typisk har hovedkvarter i de vestelige lande. Baldwin (2012) taler om »headquarter og factory economies«. Betalingsbalancen siger derfor mere om placeringen i det globale produktionssystem, idet værdiskabelsen, og ikke mindst den endelige destination for værdien, bliver mere tydeligt.

[3] Eurostat: Export market shares [bop_q_exmash]

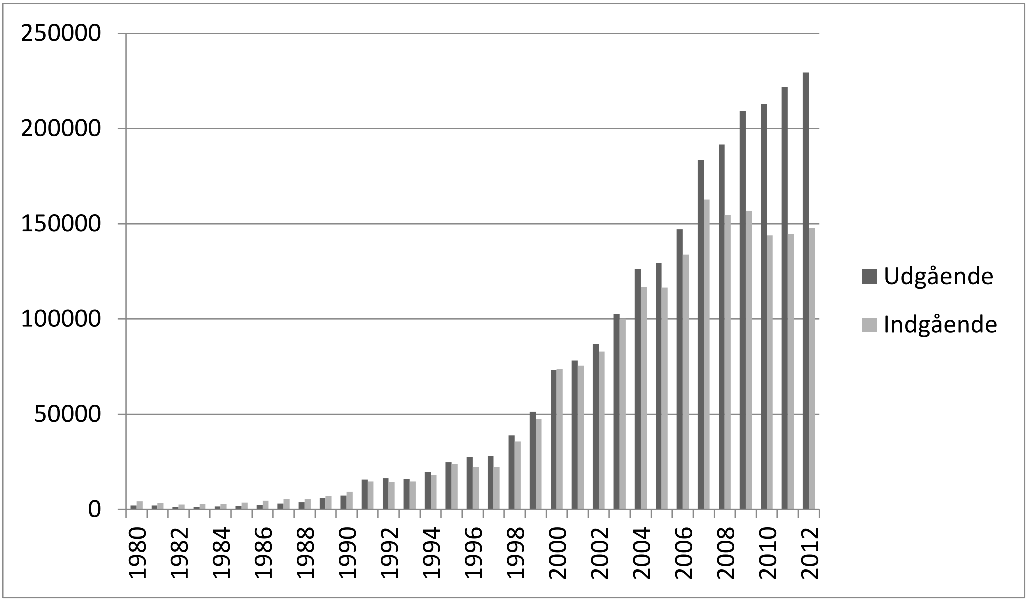
Den danske betalingsbalance, herunder især formueindkomsten fra udlandet, som primært afspejler dansk ejede aktiver i udlandet (men også danskeres lønindkomst i udlandet), viser Danmarks styrkeposition i de globale produktionskæder. Samtidig viser udviklingen i formueindkomsten, hvordan den internationale økonomi er blevet mere integreret, især siden de omfattende liberaliseringer af kapitelbevægelser i 1980'erne. Danmarks formueindkomst til og fra udlandet lå i 1972 på 0,8 pct. af BNP, mens det i 2012 var steget til henholdsvis 4,9 pct. og 8,2 pct. (Danmarks Statistik, 2013b: 26). Danmark har løbende haft overskud på formueindkomsten, som satte rekord i 2013 (Danmarks Statistik, 2014), hvilket betyder, at Danmark som et af få EU-lande har oparbejdet en stor nettoformue over for udlandet svarende til næsten 40 pct. af BNP (Danmarks Statistik, 2013b: 36). Danskere ejer således mere i udlandet (eller i hvert fald mere profitabelt), end udlandet ejer i Danmark. Derudover har bytteforholdet også udviklet sig positiv over det seneste tiår, hvilket afspejler, at danske importvarer er blevet billigere i forhold til danske eksportvarer, men højest sandsynligt også at danske varer har en bedre kvalitet, hvorved der kan opnås en bedre pris og dermed øget konkurrenceevne. Sammenlignes bytteforholdet siden 2000 med de omkringliggende lande, er det danske forbedret med 7,25 pct., hvor det tyske er på samme niveau, mens både Sverige og Finland har oplevet forringelser, Finland på hele 15,5 pct. (Nielsen og Pedersen, 2013).

En del af stigningen i nettoindkomsten overfor udlandet og den dermed forbedrede betalingsbalance skyldes danske direkte investeringer (FDI) i udlandet. I tråd med den stigende internationale økonomiske integration har FDI globalt været kraftigt stigende, især de seneste 15 år, og dansk FDI er også steget kraftigt siden midt-90'erne. Figur 3 viser, at beholdningen af udgående investeringer siden midt-00'erne er vokset hurtigere end indgående, hvilket er det samme billede i stort set alle OECD-landene. Samlet er de rige industrilandes udgående FDI 31 pct. højere end den tilsvarende indgående.[4] FDI gav et gennemsnitligt afkast på 7,2 pct. i 2011, men investeringer i OECD-landene gav lidt lavere afkast end i udviklingslandene (UNCTAD, 2013b: 32). Investeringer i f.eks. Vesteuropa er generelt mere modne, og der er derfor mindre profit at hente. 83 pct. af dansk udgående FDI er placeret i et andet OECD-land (Refslund og Goul

[4] Egne beregninger på baggrund af tal fra UNCTAD (2013b): Anneks tabel 2.

Andersen, 2014: 40). Et lavt indgående investeringsniveau kan potentielt set have negative konsekvenser for det samlede investeringsniveau, ligesom internationalt ejerskab eller investeringer kan øge produktiviteten bl.a. gennem videns overførsel. Men det synes dog ikke pt. problematisk for dansk økonomi.

Figur 3: Dansk beholdning af ind- og udgående FDI 1980-2012.



Kilde: UNCTAD http://unctadstat.unctad.org Enhed mio. US dollars i løbende priser.

Danske virksomheders internationale engagement

I en værdikædeproduktion outsourcer og/eller flytter stadig flere virksomheder dele af deres aktiviteter for derved at fokusere på de mest profitskabende dele af deres virksomhed. Dette kan foregå nationalt til underleverandører eller internationalt (herefter udflytning, se Refslund og Goul Andersen, 2014 for en uddybende diskussion). Internationalt kan virksomhederne udflytte til eksterne partnere eller selv varetage opgaverne i f.eks. datterselskaber. Danske virksomheder er i top med udflytning af arbejdsopgaver (Eurostat, u.å.), og. 19 pct. af virksomhederne med over 50 medarbejdere har udflyttet arbejdsfunktioner i perioden 2009-2011. Det er især industrien, der udflytter opgaver, og oftest er det virksomhedernes kerneaktiviteter, der er udflyttet, hvilket ca. halvdelen af de udflyttende virksomheder har gjort. Herefter følger administrative opgaver og IT-drift, som ca. 30 pct. af virksomhederne har udflyttet. Danske virksomheder flytter især til de øvrige EU-lande, og kerneaktiviteterne flyttes især til de nye EU-lande i Østeuropa, ligesom en del virksomheder har udflyttet kerneaktiviteter til Kina (Danmarks Statistik, 2012).

Til trods for stor mediebevågenhed er det stadig kun et relativ begrænset antal danske arbejdspladser, der er udflyttet (Refslund og Goul Andersen, 2014). Samlet er der i perioden 2009-2011 udflyttet 16.900 jobs, heraf 10.300 industrijob (Danmarks Statistik, 2012), mens det samlede jobtab i industrien var 65.900 jobs i samme periode.[5] Udflytning forklarer således kun 16 pct. af det samlede jobtab i perioden. Generelle dynamikker som konkurser og rationaliseringer er markant vigtigere. Der kan dog være mere substantielle effekter af udflytningen f.eks. for beskæftigelsesmuligheder, løn, faglig organisering osv., ligesom der kan være indirekte jobtab (se f.eks. Refslund, 2013 for en analyse af slagterisektoren samt Refslund og Goul Andersen, 2014 for en mere generel diskussion).

Et sidste udtryk for virksomhedernes internationale integration er, hvor mange der henholdsvis er ansat i danskejede virksomheder i udlandet, henholdsvis arbejder for en udenlandsk virksomhed i Danmark. I 2010 arbejdede 19 pct. i de danske private byerhverv (undtaget finansiel virksomhed) i en udenlandsk ejet virksomhed mod et EU-gennemsnit på 14 pct. (Danmarks Statistik, 2013c). Danske virksomheder har mange ansatte i udlandet, således arbejder 1.28 mio. i ca. 12.000 danske datterselskaber i udlandet.[6] Heraf udgør ISS dog en meget stor andel med 534.000 ansatte på verdensplan.[7] En stigende del af de udenlandske ansatte i danske virksomheder er beskæftiget med forskning- og udviklingsopgaver (Danmarks Statistik, 2013c), hvilket understreger, at det ikke kun er simple opgaver, der løses i udlandet.

[5] Danmarks Statistik, Statistikbanken (RASA11). Beregnet på DB07 branchekode C.

[6] Danmarks Statistik, Statistikbanken (OFATS2).

[7] http://www.issworld.com/en/about-iss/introduction-to-iss/fact-sheet

Dansk økonomi rigtig godt stillet

Den internationale økonomi er under forandring. Flere og flere varer og services er i dag »Made in the World« i værdikæder, som ofte spreder sig over store dele af jorden, fremfor i et enkelt land, hvilket bliver tydeligt i en Global Value Chain-analyse. Globale produktionskæder- og netværk, offshoring og outsourcing, intra-firma handel i MNV samt handel med halvfabrikater får stadig større betydning. Det betyder en mere intens arbejdsdeling med stigende udflytning af arbejdspladser samt et stigende konkurrencepres på både arbejdstagere, virksomheder og nationalstater. Forandringerne er så markante at der tales om en ny fase i globaliseringen (Baldwin, 2006; Breznitz og Zysman, 2013).

Disse forandringer påvirker nationalstaternes måde at organisere sig på især små åbne økonomier som Danmark. Det internationale konkurrencepres tillægges stor betydning, og stort set alle danske reformforslag lige fra landbrugsstruktur til folkeskolereformer indledes i disse år med; »Skal Danmark klare sig i den stigende internationale konkurrence, så…«. Selvom forandringerne har stor betydning for dansk økonomi efterlyses et mere nuanceret syn, hvilket værdikædetilgangen kan bidrage med. Danske virksomheder sikre sig en større del af værditilvæksten end traditionelle handelsmål viser, hvilket f.eks. afsløres af betalingsbalancen. Danske virksomheder er dygtige til at tilpasse og udvikle deres produkter (Hull Kristensen og Lilja, 2011). Globalisering er således langt fra et nulsums-spil for dansk økonomi, faktisk peger ovenstående analyse på, at dansk økonomi er rigtig godt stillet. Samtidig viser forskningsresultater baseret på GVC-data, at selvom der forsvinder produktionsjobs, opstår der flere GVC-relaterede jobs i servicesektoren (Timmer o.a., 2013), hvilket efterlader det samlede jobbillede væsentlig mere positivt, end det typisk fremstilles. Det betyder, at forskere, politikere og andre debattører med interesse i globaliseringsdebatten må have et mere nuanceret syn f.eks. på udflytning af danske arbejdspladser. Til trods for de kortsigtede omkostninger er der formodentlig langsigtede gevinster i form af reducerede omkostninger og dermed forbedret konkurrenceevne. Den største udfordring består i, at om-allokere arbejdskraften til de brancher, der er i vækst, hvorfor aktiv efteruddannelse stadig er meget vigtig.

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ARTIKEL III INTRA-EUROPEAN LABOUR MIGRATION AND DETERIORATING EMPLOYMENT RELATIONS IN DANISH CLEANING AND AGRICULTURE: INDUSTRIAL RELATIONS UNDER PRESSURE FROM EU8/2 LABOUR INFLOWS?*

by

Bjarke Refslund

Abstract

Eastern and Central European labour migration following the EU enlargement has significant impact on the Nordic labour markets. This article demonstrates, through sector-based case studies in Denmark, how labour migration influences working condition and wages in two sectors that have so far only been sparsely studied: the agriculture and cleaning industries. The high inflow of labour migrants is used by some employers to bypass and undermine the institutionalized class compromise, by employing EU8/2-workers at lower wages and often without collective agreements coverage frequently combined with below average working conditions. This put strains on the Danish agreement-based model of industrial relations, potentially leading to a more segmented labour market as well as replacement of native, mainly low-skilled workers with EU8/2-workers.

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* Refslund, Bjarke (2014). ” Intra-european labour migration and deteriorating employment relations in Danish cleaning and agriculture: Industrial relations under pressure from EU8/2 labour inflows?” © *Economic and Industrial Democracy*, on-line first version.

Introduction

The Nordic welfare states have been characterized by egalitarian social policies, compressed wage structures and a high degree of coordination between strong labour market actors and the state (Dølvik, 2013a). The lower wage gap between sectors meant that there was no strong labour market segmentation with entire sectors more or less only employing labour migrants. But intra-European migration mainly from the EU8/2-countries[1] might challenge this. Somewhat surprisingly and contrary to previous experiences with the EU's southern enlargement, there have been high inflows of EU8/2-workers. In the five years following the 2004 enlargement more EU8/2-workers arrived in Denmark than the Danish Ministry of Finance had estimated would arrive by 2030 (Hansen and Hansen, 2009: 13), and since then inflows have only increased.

This inflow of migrant labour is used by some employers to bypass national institutionalized class compromises, through creating non-regulated work sites with EU8/2-workers within the regulated national labour market (Lillie, 2010). This challenges employment relations with deteriorating working conditions especially for labour migrants, but also wages and working conditions of native workers become more exposed and low-skilled native workers are potentially being replaced by EU8/2-workers; furthermore, the power balance in industrial relations might be altered as seen in other European countries (see e.g. Dølvik, 2013b; Dølvik and Visser, 2009; Lillie and Greer, 2007; Lillie and Sippola, 2011; Woolfson, 2007; Woolfson et al., 2013). EU8/2 labour migration in Denmark and the Nordic countries has been the subject of significant research. In Denmark the majority of this research has been done by the Employment Relations Research Centre (FAOS) at Copenhagen University (for some of the most important studies see Andersen and Felbo-Kolding, 2013; Arnholtz and Hansen, 2013; Friberg and Eldring, 2013; Friberg et al., 2014; Hansen and Andersen, 2008; Hansen and Hansen, 2009).

[1] The analysis includes workers from the eight Eastern and Central European countries joining in 2004 and Bulgaria and Romania who joined in 2007. Malta and Cyprus are omitted since they only represented 34 and 27 migrants, respectively, in 2012 in Denmark. The remaining 10 newcomers will be referred to as EU8/2.

Construction is highly affected by intra-European labour migration, in Denmark as in other countries, hence much research has scrutinized this sector (e.g. Eldring et al., 2012; Hansen and Andersen, 2008; Kahmann, 2006; Lillie and Greer, 2007). This article broadens attention to two more rarely examined sectors: the agricultural sector and the cleaning industry. Both have higher shares of EU8/2-workers than construction, and together they employ more than 40% of all EU8/2-workers in Denmark. But the dynamic in these sectors seems somewhat different than in construction, where EU8/2-workers appear to be complementing native workers, thus performing different tasks (Andersen and Felbo-Kolding, 2013); rather, the case studies show how the use of EU8/2-workers more often, partly through the creation of unregulated work spaces, leads to native workers being substituted in cleaning and agriculture, hence the higher share of EU8/2-workers.

Despite the low status of these two sectors and especially cleaning traditionally serving as a labour market entrance, the workers and their union have over the years secured comparatively high wage levels typically at an hourly rate of 130–135 Danish krones (kr.) (€17–18) in the collective agreements, but this might be changing. So far only a few studies have examined impacts in these sectors (e.g. Wills, 2009, although with a different focus).[2] This article tries to fill some of this gap by investigating these two sectors and thus contribute to the growing literature that emphasizes labour migration's increasing impact on various institutional settings (Friberg et al., 2014; Woolfson et al., 2013) as well as different sectors (Lillie and Greer, 2007; Lillie and Sippola, 2011). The overall research question is, accordingly: how are working conditions and industrial relations in agriculture and cleaning affected by EU8/2 labour migration?

The article is structured as follows; first the Nordic and Danish industrial relations model is discussed followed by some more theoretical perspectives on the political economy of labour migration especially emphasizing the role of labour unions and employers. The next section discusses how

[2] Danish studies include Korsby (2011) and Lisborg (2011) on human trafficking and labour migrants in cleaning and agriculture respectively and Jensen et al. (2007) on migration, wages and employment in Danish farming.

subcontracting is used as one of the main mechanisms through which labour migration affects working conditions and industrial relations by bypassing the Danish IR system and creating low-regulated sub-labour markets mainly employing EU8/2-workers. Then the article's methodological approach is discussed. Thereafter the article continues in three sections: the first section presents and discusses statistics on the increased inflow of EU8/2-workers in Denmark since 2004. Then the case studies findings are presented, demonstrating how EU8/2 labour inflow is increasing tensions on wages and working conditions as well employers' organizations and not least unions in agriculture and cleaning. Besides summarizing the results, the concluding section discusses the wider potential outcome of labour migration in Denmark and the Nordic countries.

Labour migration and industrial relations: Creating non-regulated spaces

European integration is increasingly impacting national labour markets, but the most important aspect seems to be the free movement of labour in the enlarged European Union, thus making labour migration possible in the first place. Labour migration is mostly driven by the demand for labour in the receiving countries (Piore, 1979; Sassen, 1988), but is obviously also affected by supply side dynamics (Meardi, 2012; Trondsted and Joona, 2013), e.g. the vast wage differences in the enlarged EU (Dølvik, 2013b). But due to the strong coordination of industrial relations in Denmark and the Nordic countries there have not been entire industries mainly employing migrant workers as described by Piore (1979).

Nordic and Danish industrial relations

Industrial relations and labour market regulation in the Nordic countries are in many ways still different from the rest of Europe (Amable, 2003; Crouch, 2012). Once termed the social-democratic model (Esping-Andersen, 1985) these countries still have high levels of unionization, high collective bargaining coverage, strong coordination between relative equal social partners and low levels of state interference (Andersen et al., 2014; Dølvik, 2013a). Even though there are also differences between the countries (e.g. lower unionization rates and the use of extension of collective bargaining in

Norway; cf. Andersen et al., 2014: 31–36) these countries still share many features of labour market regulation (Crouch, 2012) especially comparatively high levels of unionization and powerful unions, which distinguishes the Nordic countries from the liberal and conservative regimes (Dølvik, 2013a; Esping-Andersen, 1990; Korpi, 1983). So the Danish case studies findings could serve as a ‘crucial case’ (Gerring, 2007: 115–122), which might also have implications for the other Nordic countries. If the highly regulated Danish labour market cannot prevent exploitation of migrant labour and undercutting of working conditions, less regulated labour markets will most likely not be able to do so either.

The high Danish unionization rate of 67% (Ibsen et al., 2012: 77) and a collective bargaining coverage rate of 83% (DA, 2013: 242) have, despite sectorial differences, resulted in relatively high wage levels and low wage gaps, including modest inter-sectorial wage gaps. Since there is no law-based minimum wages, *erga omnes* or other extension mechanism of collectively bargained wages in Denmark, wages are formed through collective bargaining between unions and employers’ associations, typically combined with local negotiations. Employers without collective agreements usually follow terms and wages set in the sectorial collective agreements but due to the lack of law-based minimum wages lower wage levels are in principle possible. If this happens unions will usually try to force employers into complying with collective agreements through industrial action, typically a blockade or at first a blockade warning. However unions do not have the necessary resources to control or even locate all minor and remote work sites where employers are trying to use non-regulated employment (interview local union representative 2), and if there are no union members in the work site industrial action becomes much more difficult.

Subcontracting EU8/2-workers: Bypassing collective bargaining

Often the employment of EU8/2-workers at below-average wage and working conditions is used to surpass national labour market regulation (Dølvik and Visser, 2009; Lillie, 2010) and this is also the case in Denmark. Following the discussion on the Posted Workers Directive and the Laval Quartet rulings posted workers were seen as the main issue of intra-European labour migration. But in the sectors analysed posting is not the main issue. Since there is no minimum wage firms can pay very low wages, which makes posting less attractive in the first place. By 2013 only 13% of the registered EU8/2-workers in Denmark were posted or self-employed, and more than 60% of those were in construction, where half of all EU8/2-workers are posted. Fewer than 2% in cleaning are posted. Posting is more common in agriculture, although still low with 11% posted workers,[3] often working on time-bound tasks like foresting or berry-picking.

Like most EU15 countries Denmark opted for a transitional agreement for labour market access where EU8/2-workers had to document that they would be working on wage and working standards set in the collective agreements before obtaining a Danish work permit (Hansen and Hansen, 2009: 91). But since the end of the transitional agreement on 1 May 2009 it has been up to the unions to push for collective agreements, and make sure the terms set in the collective agreements are followed, which is very demanding in certain sectors (Andersen et al., 2014: 98).

Problems in the two sectors studied generally arise when employers bypass collective agreements and create non-regulated work spaces through widespread subcontracting, e.g. to small Danish-based firms, but also to foreign companies without collective agreements (cf. Andersen et al., 2014: 97). This strategy has been used by larger cleaning firms, denying responsibility for employment relations at the subcontractors.[4] In the case studies it seems evident that subcontracting EU8/2-workers, especially in cleaning but also in agriculture, is often used mainly to circumvent collective agreements especially in minor companies. European research has shown that externalizations or outsourcing of activities often lead to corrosion of employment relations and is used to circumvent already existing labour regulation (Flecker, 2009: 253; Holst, 2014; Lillie, 2010; Lillie and Greer, 2007; Marchington et al., 2005).

Both agricultural and cleaning have below average collective bargaining coverage. In Denmark 83% of all employees are covered by a collective

[3] Own calculations based on NLMA data.

[4] For an overview of cases in cleaning see: www.fagbladet3f.dk/temaer/beskidt/

agreement (DA, 2013: 242). In agriculture it is only around 50%, while two-thirds are covered in the general service sector.[5]

EU8/2-workers employed by companies who are members of an employers' association and/or covered by collective agreements and shop steward/union representative have significantly higher wages and in Denmark this also includes agency workers who are usually covered by collective bargaining (Andersen and Felbo-Kolding, 2013: 150–151; Hansen and Andersen, 2008; Hansen and Hansen, 2009: 94).

Unions, employers and labour migration

Menz (2005) found in a study of intra-European labour mobility in the 1990s that the strength of organized labour was an important determinant in reducing downward wage pressure. This supports the argument that institutional settings, especially collective bargaining coverage, are important for how migrants are treated, but also how migrants impact national labour markets (Friberg et al., 2014). Accordingly we expect migrants to have better wages and working conditions in the Nordic countries (Friberg et al., 2014). Migrant workers in the UK and Germany, for example, seem to have more precarious conditions than in Denmark, although this article also finds exploitative practices of labour migrants in Denmark.

Much literature on labour migration has treated employers as uniformly supporting free movement of labour, but recently Afonso (2012) has emphasized conflicting preferences among employers, reflecting previous work by Korpi (2006). Korpi distinguishes between employers as protagonist, antagonist or consenters towards general social policy (whereas Afonso discusses regulation of migrant wages), where consenting often reflects employers not being able to fulfil their first-order preferences. So employers, with first-order preferences for low regulation of labour relations, e.g. migrant wages, might consent on regulation because of the threat of more far-reaching legislation or because of public outcries like media attention.

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[5] Unpublished survey data from Ibsen et al. (2012).

Unions have traditionally been sceptical towards labour migration since they feared that additional labour supply would put pressure on wage levels (Goldthorpe, 1984) and unions have had difficulties adjusting to the challenges of post-industrial societies (Ebbinghaus, 2006). Despite traditional doctrines of transnational solidarity, unions have in practice remained focused mainly on national members' interests (Krings, 2009: 50), and unions have even been criticized for being ethnocentric (Lillie and Sippola, 2011; McGovern, 2007). However, there are large national differences in union approaches reflecting institutions and political-economic conditions (Krings, 2009: 52) such as the range of migrant labour, level of collective bargaining coverage, labour demand, and notleast union strength.

Many unions, once it became clear they could not stem immigration, have changed strategy, now pushing for equal working conditions and wages for all employees, regardless of status, thereby trying to reduce the phenomenon of 'social dumping' (Krings, 2009: 50). Danish unions, including 3F the main industrial union for low-skilled workers, including agriculture and the service industry, embrace this strategy and are not opposing labour migration, as long migrants are working on 'Danish conditions' understood as the terms set in the collective agreements.

Method

While much economic research (see Barrell et al., 2010 for an overview) shows no major impact of labour migration on overall wage and employment levels, sociological and institutional research have recently identified impacts and changes in the Nordic countries (see e.g. Eldring et al., 2012; Hardy et al., 2012; Lillie and Sippola, 2011). This divergence is most likely explained by different levels of aggregation (Arnholtz and Hansen, 2013). Analysis at high aggregation levels, like cross-country analyses (e.g. Kahanec and Zimmermann, 2010), often find no negative, if any, impact of labour migration. However, at this level of aggregation sectorial as well as institutional and regulatory impacts are often ignored (Eldring and Schulten, 2012: 235). Therefore further country and sector case studies are needed to strengthen our knowledge on the dynamic interaction between migration, labour markets and societal changes, but also cross-national variations of labour migration.

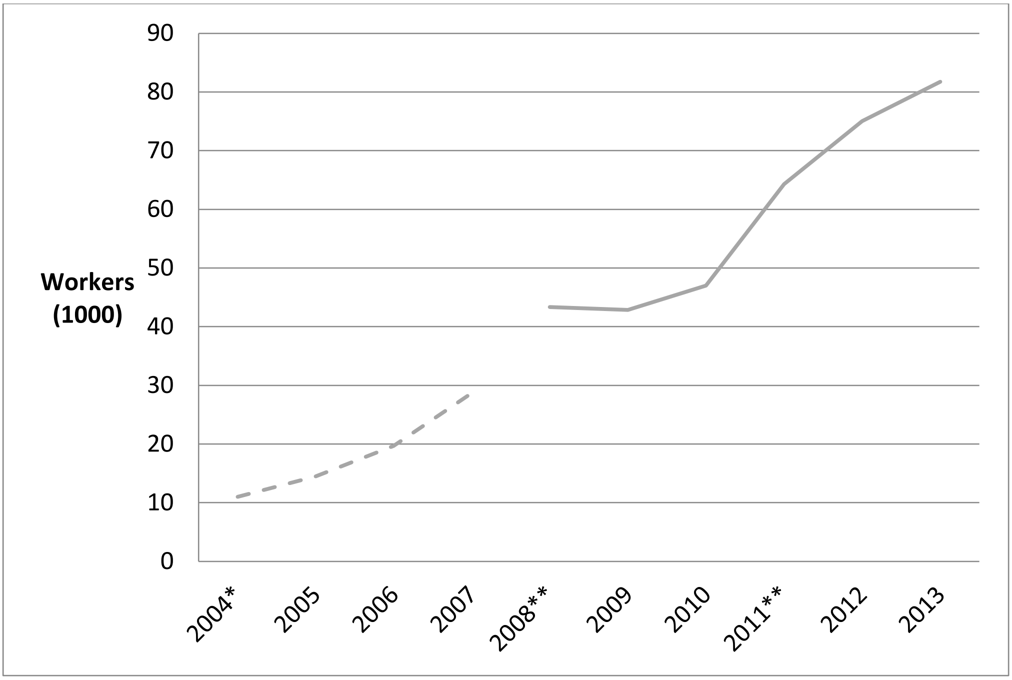
This article analyses two sectors that have often been neglected in the literature. It combines a case study research design with descriptive statistical data on labour migration from Eastern and Central Europe based on government register data like wage data and firm-level registration (see the next section for the full description of the statistical data from the Danish National Labour Market Authority; hereafter NLMA).[6] The NLMA data were combined with sectorial labour market statistics on employment, etc. from Statistics Denmark.

The case study evidence was collected through public documents, media coverage, existing literature, etc. within the Danish agriculture and general cleaning sectors. Finally 17 in-depth interviews were conducted. These included eight interviews with national and local union representatives (including a Polish-speaking union worker) and two representatives from employers' organizations as well as interviews with management and HR managers and a Romanian cleaning supervisor in a larger cleaning company. Representatives from construction, transport and the confederate level unions (both 3F and LO) were also interviewed. The semi-open interviews, which in general lasted between one and one-and-a-half hours emphasized the interviewees' factual understanding of institutional and organizational issues rather than personal experiences, although personal experiences obviously also shape the understanding. The questions asked mainly focused on the institutional impact of EU8/2 labour migrants in the affected sectors including industrial relations, working conditions, employment patterns, etc. Afterwards the content of the interviews formed the basis for the qualitative data in the article. Since labour migration is a highly salient political issue interviewees might perceive the research interviews as part of the political game (Lillie and Sippola, 2011: 294–295). So in order to validate interview data as well as general arguments made in the article the interview data have been tested against other available sources.

[6] The data can be accessed via www.jobindsats.dk.

While not including any EU8/2-workers in the interviews was a deliberate choice in the research design, this is obviously problematic for understanding the incentives and perceptions of the labour migrants themselves and how this contributes to the institutional and organizational changes but this important aspect lies beyond the scope and intentions of this article. Other Nordic and Danish research has taken the labour migrants as the starting point of enquiry (see e.g. Friberg and Tyldum, 2007; Hansen and Hansen, 2009), and future research should also seek to incorporate the migrant workers in a more comprehensive manner.

Figure 1: EU8/2-workers in Denmark 2004-2013.



*No posted workers included in 2004-2007 figures
**Change in data due to mandatory registration
Sources: 2004-2007: (Malchow-Møller et al., 2009); 2008-2013: NLMA-data.

The unexpected inflow of EU8/2-workers

As shown in Figure 1 the numbers of EU8/2-workers in Denmark have skyrocketed since 2004, but were brought to a halt by the crisis, while increasing significantly again since 2010. The actual figures are most likely higher due to non-registered workers. Despite some uncertainty due to different data sources and changes in registration the overall tendency in Figure 1 is very clear and established in the literature on labour migrants in Denmark (Andersen and Felbo-Kolding, 2013). Before the EU enlargement there were around 10,000 EU8/2-workers in Denmark and basically no posted workers. By 2013 more than 80,000 EU8/2-citizens worked in Denmark. Even though the number of EU8/2-workers has increased significantly the overall share of employment is moderate at around 3%.[7]

Improved Danish data on intra-European labour migration

Establishing exact numbers of migrants is difficult, especially since significant shares might not be registered. Reliable European figures on labour migration are very limited, so the Danish official data on migrant inflows, which has improved greatly in recent years, are very useful (see e.g. Andersen and Felbo-Kolding, 2013; Arnholtz and Hansen, 2013). The official statistics from the NLMA were improved in 2008 and again in 2011 due to mandatory registration of foreign companies and workers as well as the merging of several data sources by Danish authorities.[8] Although statistics have been improved only EU8/2-workers registered by Danish authorities are reported. All foreign companies and self-employed workers are required to register with Danish authorities either to Registret for Udenlandske Tjenesteydere (Register for Foreign Service Providers; RUT) or the tax authorities, but fines for not registering are modest. According to a joint operation by the Danish Working Environment Authority, tax authorities and the police, 21% of the foreign companies examined were not

[7] Own calculation based on Statistics Denmark RAS data.

[8] The combined data sources are four different registers; of non-nationals; general person-register (CPR) and company register (CVR) and the ICT-based wage register (see www.jobindsats.dk).

legally registered.[9] While these operations were targeted work sites where unregistered workers were most likely encountered, it confirms some EU8/2-workers are still not registered in Denmark, making the official figures too low. Data presented here refer to the number of workers rather than full-time equivalents. The temporary nature of much migrant work, discrepancies between official and unofficial hours, some EU8/2-workers combining registered and non-registered work and many EU8/2-workers working fewer hours than they actually want to (Hansen and Hansen, 2009: 68; see cleaning section below) make the number of EU8/2-workers more relevant than full-time equivalents. When measured in full-time equivalents numbers are roughly halved. Finally a majority of EU8/2-workers report living in Denmark (Andersen and Felbo-Kolding, 2013: 44–45).

Sectorial and national composition of labour migrants

Like in other receiving countries the EU8/2-workers are highly concentrated within certain economic sectors. EU8/2-workers constitute 24% of the agriculture workforce (and 48% of all employees if all EU8/2-workers are assumed to be employees) and 15% in the broad overall cleaning category.[10] However if we make the reasonable assumption that all EU8/2-workers are employed in general cleaning (see below) the share is 35–40%. By contrast EU8/2-workers only constitute 8% in construction. In Denmark 89% of all EU8/2-workers are working in agriculture, construction, certain parts of manufacturing, transportation, hotels and restaurants and cleaning.[11] EU8/2-workers' employment levels equal those of natives, unlike those of non-EU migrants (Andersen, 2012) and 68% are male, which might also reflect that work is the main motive for migration (Hansen and Hansen, 2009).

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[9] See arbejdstilsynet.dk/da/tilsyn/udenlandske-virksomheder/social-dumping-resultater/indsats-15-januar-2013.aspx; www.fagbladet3f.dk/nyheder/fagligt/f086cbcea7de4875af20f015486f7369-20130212-ulovlige-oestfirmaer-saetter-ny-rekord.

[10] Category DB-07 code N (includes other occupations).

[11] Statistics in this section are own calculations based on 2013 NLMA data and sectorial employment data from Statistics Denmark (RAS data).

As regards nationality, Poles constitute by far the largest group in Denmark (43.3%), followed by Romanians (18.1%), Lithuanians (17.4%), Bulgarians (6.2%) and Latvians (5.8%), as shown in Table 1. However the composition is changing; Poles are less dominant than previously (even though absolute numbers are still growing), while shares of Romanians, Lithuanians and Bulgarians are increasing. The same tendency is reported at European level, with EU2 migration growing faster than EU8 migration while Polish migration has slowed, revealing signs of increasing return migration (Galgóczi et al., 2012), due to higher wages and improving living conditions in Poland. Poland's PPP (purchasing power parity) ratio compared to the EU27 average has risen from 48% in 2001 to 62% in 2010 (Kaczmarczyk, 2012: 180).

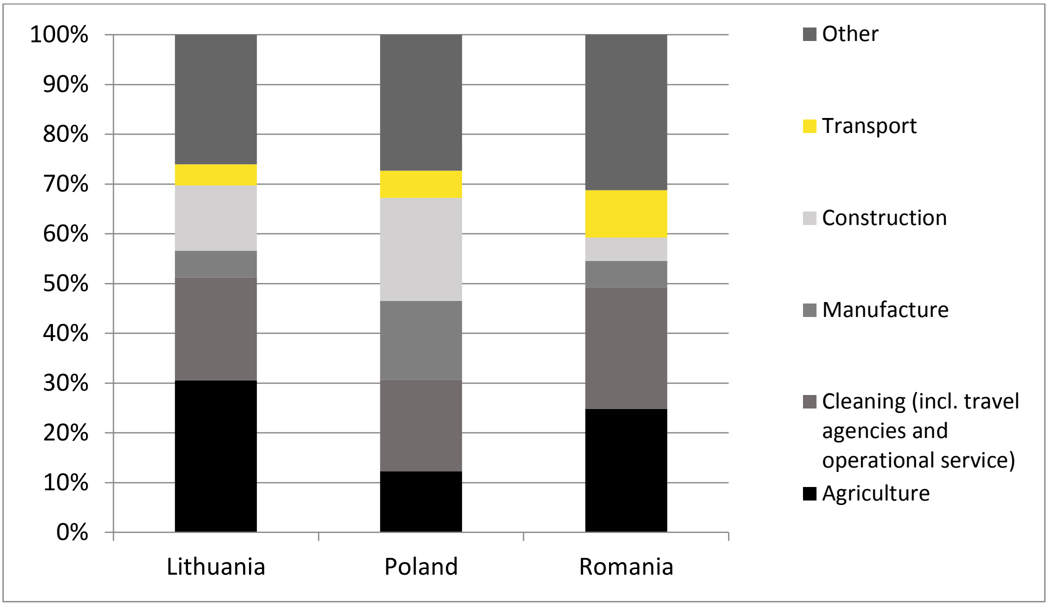
Table 1 EU8/2-workers in Denmark 2013

Poland	**35.396**
Romania	**15.463**
Lithuania	**14.247**
Bulgaria	**5.083**
Latvia	**4.706**
Hungary	**2.821**
Slovakia	**1.838**
Estonia	**950**
Czech Republic	**950**
Slovenia	**275**

Sources: National Labour Market Authority

The sector concentration varies with nationalities. For the three largest groups: Romanians, Poles and Lithuanians, there are marked differences, as shown in Figure 2. Romanians mostly work in agriculture (25%) and cleaning (24%), as do Lithuanians (31% and 21% respectively). Poles more often work in construction (21%) and manufacturing (16%), even though cleaning (17%) remains significant. Apparently Poles who formed the first wave of migrants are moving into e.g. manufacturing, leaving less attractive work in agriculture to Romanians and Lithuanians, this was also confirmed in the interview data. Similar trends are observed elsewhere, e.g. cheaper Bulgarian and Romanian workers are replacing Polish workers in the German subcontracted slaughterhouse industry (Refslund, 2012).

Figure 2 Differences in sectorial composition 2012.



Sources: National Labour Market Authority

Migration flows during the crisis

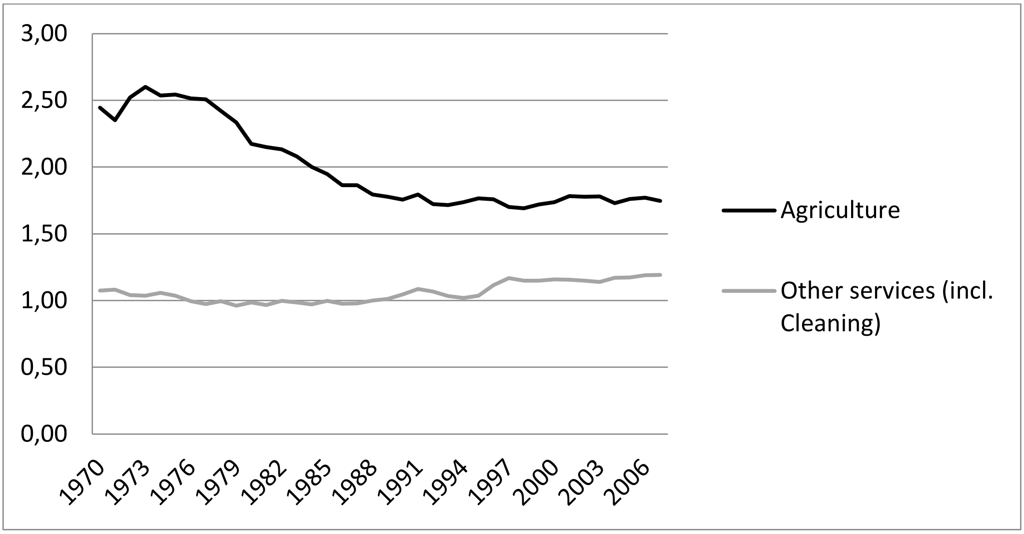
A central question in labour migration research is how business cycles, especially economic downturns like the current one, affect migration flows. The inflow after 2004 occurred in a strong economic upturn with labour shortages in many EU15 countries, especially within construction. It was anticipated that inflows would be highly sensitive to economic cycles (see e.g. Bauer and Zimmermann, 1999), but the recent developments suggest intra-European migration is less affected by economic fluctuations than global migration which was significantly reduced by the crisis (Tilly, 2011: 680–681). The number of EU8/2-workers only declined slightly at the onset of the crisis, even though Denmark experienced enduring low growth and high unemployment until 2013, especially for low-skilled workers. As anticipated by Piore (1979: 59–60) an increasing share of labour migrants appear to be settling in the Nordic countries (Andersen and Felbo-Kolding, 2013: 44–45; Andersen et al., 2014: 96; Friberg and Eldring, 2013: 12). This disconfirms to some extent popular beliefs of EU8/2 labour migration as highly geographically mobile and circular. The next sections present the case study results and then employers' as well as unions' strategies are discussed before the overall implications of the case studies are summarized.

Case studies: EU8/2-workers in Danish agriculture and cleaning

Especially the cleaning industry has traditionally been a labour market entrance for migrants and refugees, combing low skills and language requirements with tough physical work. In 2010 nearly 40% of the employees in general cleaning had a foreign background (DI, 2012: 19). But despite this, workers in these industries still had decent working conditions and wages in Denmark. Figure 3 shows the wage difference between agriculture and the broader service sector and manufacturing. As shown in Figure 3 agricultural wages have converged significantly since 1970, while wages in 'other services' have remained at large at the same level as manufacturing. This reflects the Nordic IR models' traditional ability to create a high wage floor (Andersen et al., 2014; Dølvik, 2013a) especially for low-skilled jobs in industries that typically are low-wage areas with much precarious employment.

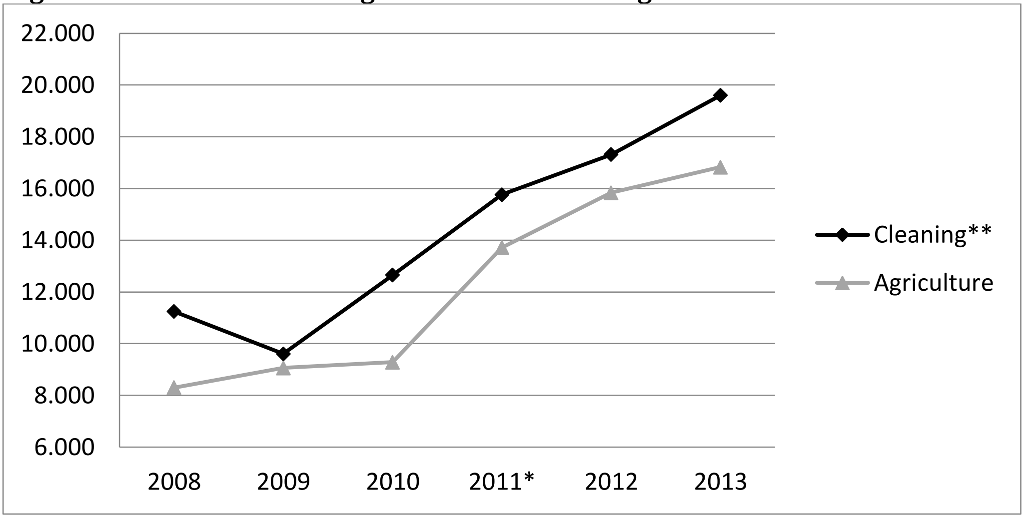
But both sectors are increasingly cost-competitive and face strong pressure to reduce costs, with international competition increasing in agriculture while the cleaning industry has seen extensive outsourcing of public cleaning which has profoundly affected the industry (cf. Hermann and Flecker, 2012), thus increasing incentives to employ EU8/2-workers to reduce costs. EU8/2-workers have nearly doubled since 2008 in both sectors, as shown in Figure 4.

Figure 3: Wage difference between manufacturing and the sectors analysed 1970-2007.



Data: EU KLEMS 2009

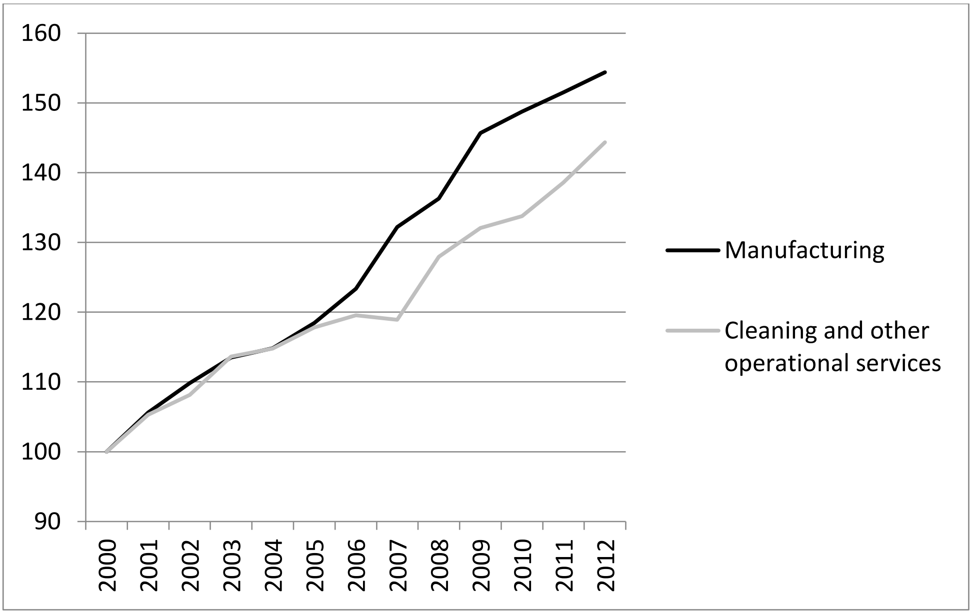
Figure 4 EU8/2-workers in agriculture and cleaning.



Sources: National Labour Market Authority (www.jobindsats.dk). 2008 figures are most likely underestimated since 19 % of overall EU8/2 employment was not-specified activity compared to 7 % in 2012. This slightly moderates the increase. *Change in data due to mandatory registration **Includes travel agencies and other operational service that does not employ any significant numbers of EU8/2-workers.

Sidestepping collective agreements, often through the use of EU8/2-workers, combined with increasing cost pressures, might in the long term lead to larger wage gaps between different sectors (Andersen et al., 2014). The case studies report tendencies towards weaker wage growth in the analysed sectors, and the same is found in cleaning, as shown in Figure 5, thus distorting the stable wage dispersion. Statistics on recent wage development in agriculture are omitted due to uncertainty, mainly due to low numbers of employees in the firms (statistics only available for companies with >10 employees) and difficulties in determining working time. So if these more weakly organized sectors experiences growing wage gaps vis-a-vis the manufacturing sector, this could undermine the tradition of high wage floors in the Danish labour market, or create wage restriction pressure in other sectors (Dølvik, 2013b; Dølvik and Visser, 2009).

Figure 5 Wage index cleaning and manufacturing 2000-2012 (2000=100).



Source: Statistics Denmark wage statistics (SLON40 and LON04). Cleaning category (N) also includes travel agencies.

The high flexibility of the Danish labour market with easy access to layoffs creates low incentives for non-standard employment, which has remained at rather low levels (Madsen, 2013). However migrant workers more often have non-standard employment (Friberg et al., 2014; Madsen, 2013), and EU8/2-workers are highly overrepresented among temporary workers (Stuvøy and Andersen, 2013). Non-standard employment means that migrant workers more often find themselves in precarious employment (Friberg and Eldring, 2013; Friberg et al., 2014). They work too many hours compared with the actual pay (Friberg et al., 2013: 114–116), as has often been reported in construction (interview local union representative 1), they have problems with payment (Friberg et al., 2014: 44) and often miss out on non-wage benefits like paid leave and pensions, and they are often not eligible for social benefits like unemployment benefits (Hansen and Hansen, 2009). Problems with working conditions are often worse in smaller companies, whereas bigger companies in general have better conditions (interviews, several employer representatives and labour representatives; cf. Hansen and Andersen, 2008: 73). But there are vast differences between firms (both intra- and inter-sectorial); some are complying fully with collective agreements while others opt out of the collective agreements to gain competitive advantages (Stuvøy and Andersen, 2013: 260).

Cleaning: Outsourcing and subcontracting migrants

The Danish industrial system has created a comparatively egalitarian wage structure (Dølvik, 2013a), which has been especially important in the public sector that to some extent served as a buffer for low-skilled labour (Hermann and Flecker, 2012). Historically, cleaning workers enjoyed stable working and wage conditions but the recent wave of outsourcing and especially the marketization of public cleaning has led to sharp declines in working conditions and wages (Hermann and Flecker, 2012; Wills, 2009). Also much cleaning previously conducted in-house in manufacturing and typically covered by the manufacturing collective agreement has been reorganized to other suppliers often with lower wages. Virtually all Danish municipalities have outsourced public cleaning of schools, administrative buildings, libraries, etc. to private operators, due to a strong emphasis on cost reductions and budget restraints. This has led to a marked increase in subcontracted workers which has been the major cause of the contemporary problems in the sector (Korsby, 2011: 21; interview national union representative cleaning; cf. Wills, 2009 for a description of the UK development).

Outsourcing of cleaning has strongly affected working conditions in the industry (cf. Hermann and Flecker, 2012), because public employers were traditionally setting industry standards through collective agreements (Corby and White, 1999), in contrast to the private sector where union representation was much weaker. With the majority of cleaning now in private companies, there is no such benchmark, and workers are more exposed to market negotiation of wages and working conditions. Some of the previously public cleaning is now done by subcontracted EU8/2-workers without collective agreements at very low wages,[12] so the state or at least local authorities have paved the way for this erosion of working conditions through outsourcing.

In a large municipality studied for this article public school cleaning was outsourced to reduce costs. Working hours were changed from the usual 7 a.m. to 3 p.m. to 5 a.m. to 7 a.m. in the morning followed by hours in the afternoon to increase efficiency by cleaning when no school children are present. In the 1980s and 1990s KAD (the female workers' union that covered cleaners, now merged into 3F) had a political agenda to make cleaning more recognized as a profession thus raising the working conditions. They campaigned somewhat successfully for 'Decent cleaning', which meant among other things 'visible cleaning' to give cleaning workers a human face in schools and other public institutions. These improvements in working conditions are compromised by the subcontracting practices. The changed working hours also increased unpaid transport. Overall, widespread outsourcing has led to a deterioration of collective agreements and working conditions in the industry. Much of the outsourced work is now done by subcontracted or agency companies often employing EU8/2-workers, so outsourcing has increased the inflow of migrant workers. Many of the agency companies pay below the wage level agreed in the collective agreements (Stuvøy and Andersen, 2013: 258–259) and many cleaning companies try to avoid entering collective agreements (Andersen et al.,

[12] For an overview of cleaning cases see: www.fagbladet3f.dk/temaer/beskidt/.

2014: 97). Typically the public task giver (e.g. a municipality) outsources to a private company, but the work is often subcontracted to other companies, and the municipalities are often not controlling working conditions at the subcontractors. The work is sometimes even further subcontracted in chains of companies to blur employment relations for unions and public task givers. Some of these subcontracting companies use undocumented, mainly Romanian workers (interview local union representative 5).

Nearly all 19,600 EU8/2-workers in the cleaning sector are employed in the subcategory 'general cleaning' (interviews: employers' organization representative 2; national union representative cleaning), which basically is all unspecialised cleaning. If measured in fullitime equivalents, the EU8/2-workers only amount to 6400 workers, reflecting that the majority are working part-time filling in hours, often only a few hours a week. The difference between employed and full-time equivalents is only 20% for native workers compared with nearly 70% for EU8/2-workers.[13]

Cleaning workers often have precarious working conditions, atypical work hours and isolated and minor work sites including private homes (Gavanas, 2010: 31–32). Subcontracting of migrant workers has made the work even more precarious (Wills, 2009), especially when conducted in private homes (Friberg et al., 2014: 45) and subcontracting is often used to circumvent collective agreements (Stuvøy and Andersen, 2013: 247). Also wages have been compromised because of the absence of collective agreements, which leaves EU8/2-workers free to accept very low wages with examples of hourly wages around 40–50 Danish kr. (Korsby, 2011: 49) compared with the collective agreed hourly wage above 130 Danish kr.[14] There are repeatedly media reports on migrants working and living under very poor conditions also facing problems with housing and transportation and even examples of coercive work and slave-like conditions have been reported in interviews (interviews national union representative cleaning; local union representative 5). At least three court cases have involved labour migrants in

[13] Own calculations based on Statistics Denmark (Statistikbanken).

[14] Wage statistics 3F homepage.

cleaning and two persons have been sentenced two and two-and-a-half years in prison for exploiting nine Romanian workers.[15]

3F have actively and rather successfully worked to put this on the media agenda, which together with organizational attention has dampened the problems. Some companies actually inform 3F about potential problems with wages, subcontracted workers, etc. (interview national union representative cleaning). Collective agreement coverage is also on the rise because of this attention to the issue,[16] with several municipalities adding social clauses to their outsourcing contracts restraining subcontractors. But the problems are far from resolved; there are, for example, still problems with fake identification papers, making it difficult for companies to check the workers' identity and legal status (interview national union representative cleaning).

Overall sector union representatives fear that 'if the flow of Eastern Europeans continues, then I don't think that there will be any Danish cleaning workers left in the long run' (interview local union representative 3). Outsourcing of previously public cleaning, but also of private cleaning, e.g. in manufacturing, combined with some employers, particularly subcontracting companies, using the inflow of poorly organized EU8/2-workers to circumvent collective agreements, have made cleaning workers (both natives and EU8/2-workers) more vulnerable.

The agricultural sector

Denmark is historically an agricultural country and remains one of the world's leading exporters of pork and pork products. The agricultural cluster accounts for nearly a quarter of overall goods exports and 15% of overall exports. In the last 15–20 years the sector has seen major changes in labour composition. By 1993 there were only 2% immigrants in farming (Jensen et al., 2007: 7); while in 2013 EU8/2-workers accounted for 24% in

[15] See www.fagbladet3f.dk/temaer/beskidt/30361c2075e64910a1a9857221e1f946-20140326-rengoeringsbosser-idoemt-faengsel-for-at-udnytte-rumaenere and http://www.e-pages.dk/3f/1351/34 (pp. 34–39).

[16] Mail correspondence (national union representative cleaning).

the agricultural sector, having doubled since 2008.[17] This happened despite declining primary sector employment, which was reduced from 140,000 in 1993 to 69,600 in 2012,[18] which is mainly explained by rapid centralization and productivity gains that also dramatically increased farm sizes (Jensen et al., 2007: 10). Traditionally there were many self-employed, small- and medium-scale farmers and today there are still more part-time farms than full-time.

In 2004 Poles were the largest group, but since then shares of Romanians and Lithuanians have increased, so in 2013 there were around 4600 Romanians and 5000 Poles as well as Lithuanians.[19] The increase could, according to Andersen and Felbo- Kolding (2013: 180), potentially be explained by lower wage expectations of especially Romanians. EU8/2-workers are often employed in pig farming, horticulture and forestry, while only a few work in traditional crop farming (Jensen et al., 2007: 13; interview employers’ organization representative 1).

EU8/2-workers constitute the majority of the workforce in several agricultural companies especially within forestry, and in 8% of the companies employing EU8/2-workers they account for more than 90% of the workforce (Andersen and Felbo-Kolding, 2013: 85). This is, according to interviewed union workers (interviews local and national union representative agriculture), because employers are replacing Danish workers with cheaper Eastern European labour; while employers state they cannot get the Danish labour needed (interview employers’ organization representative 1; Stuvøy and Andersen, 2013). But from the scope and speed of the replacement of native workers with EU8/2-workers, it seems evident that wages and working conditions play an important role in this process.

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[17] Andersen and Felbo-Kolding (2013: 55) reports 27% of farming employment. Figures here include horticulture (with many EU8/2-workers) and fishery (fewer EU8/2-workers). Own calculations based on NLMA data and employment data (Statistics Denmark).

[18] Statistics Denmark (RAS2). Available at: www.statistikbanken.dk.

[19] Source: NLMA data.

Agriculture has traditionally been rather loosely organized compared with the overall Danish labour market (Andersen and Felbo-Kolding, 2013: 180) and agricultural workers traditionally identified themselves more as farmers than rural workers. Many of the current problems in the sector stem from the general lack of organization and collective agreements. Andersen and Felbo-Kolding (2013: 179–181) report that employers in agriculture very often use EU8/2-workers (40% of companies within the last year) and frequently use time-limited employment of EU8/2-workers (58%), and the lowest paid tenth of the EU8/2-workers in agriculture is the lowest paid among all industries with an hourly average of 85 kr. (compared to the hourly average minimum in the collective agreements of at least 125 kr.). 3F has reported several incidents with even lower wages down to 30 kr./hour.[20] Several of these incidents have (at least to some extent) been acknowledged by the employers who all together paid 18 million kr. in compensation in agriculture alone for underpayment between 2008 and 2013.[21] At the same time agricultural employers are trying harder than other employers to integrate EU8/2-workers through language education and training, which shows agricultural employers perceive the EU8/2-workers as a more permanent workforce (Andersen and Felbo-Kolding, 2013:181).

The frequent use of temporary or posted EU8/2-workers often working below the collective agreements terms (Stuvøy and Andersen, 2013) and low levels of collective bargaining have led to several examples of precarious working conditions in agriculture. Workers experiencing these conditions are typically working on time-limited, specific tasks like berry-picking and cutting Christmas trees. This challenges the already weak industrial relations in Danish agriculture increasing pressure on migrant workers as well as natives, unions and organized employers. As stated by one regional union representative: ‘Hell broke loose after 2009’ (interview local union representative 2).

[20] See e.g. www.fagbladet3f.dk/nyheder/fagligt/2001d3c05b7644bfae2ccf7cebf71f40-20131111-firma-udlejer-starbejdere-til-30-kroner-i-timen.

[21] See www.fagbladet3f.dk/nyheder/fagligt/7079778b05a24a8db3b2b7a507ca502d-20130422-loendumping-for-18-millioner-kroner-paa-det-groenne-omraade.

Danish unions and EU8/2-workers

Union strategies towards labour migration could include pushing for more state regulation (e.g. to reduce inflows or introducing minimum wages), trying to force employers into collective bargaining, or trying to organize the migrants (Kahmann, 2006). Danish unions have, except for supporting the transitional restrictions in 2004–2009, embarked only on the latter two. The Danish IR system is based on very limited state action and unions generally oppose state intervention (Andersen et al., 2014). But the urge to include EU8/2-workers in Danish collective bargaining is not merely altruistic, but an attempt by unions to reduce downward pressure on wages and working conditions (Friberg et al., 2013: 46). However, unions have, as shown, severe problems in negotiating collective agreements with some of the companies employing EU8/2-workers as well as continuous problems with organizing EU8/2-workers.

The Danish unionization rate is 67% (Ibsen et al., 2012: 77), whereas estimates of EU8/2-workers' unionization rate in Denmark is 10–20% at most (Andersen and Arnholtz, 2013). This is despite rather serious efforts by 3F and other Danish unions to organize EU8/2-workers, e.g. by employing Polish-speaking organizers. The EU8/2-workers are not per se in opposition to unions (Eldring et al., 2012: 33; Hansen and Hansen, 2009). But they are significantly less likely than Danish workers to be union members, partly because of the temporary nature of their work (Piore, 1979: 109–110) and especially when in temporary employment (Stuvøy and Andersen, 2013: 266). According to interviewed union workers EU8/2-workers have lower incentives to organize and poor understanding of how the rather complex Danish labour market works (interview local union representatives 1, 3 and 4). When EU8/2-workers enjoy good conditions and are covered by collective agreements, they do not see the reason for joining a union and often think it is too expensive (interview local union representative 1). They often only contact the union ex-post when having problems with pay or working conditions, and often without being union members (interview local union representatives 3 and 4). Since wages are much higher, up to eightfold, compared with their home country, incentives to engage in industrial conflicts are very low.

EU8/2-workers have different perceptions of unions than natives. Poles, for example, have more negative perceptions of unions (interview local union representative 1; see also Greer et al., 2013: 13). EU8/2-workers are also more compliant towards employers and supervisors than Danes (Pedersen and Thomsen, 2011: 54). This, combined with antagonistic behaviour of some employers towards organized labour, makes organization really difficult. EU8/2-workers unionizing or even contacting unions have been fired or threatened with dismissal (interview local union representative 1; local union representative 2). Often EU8/2-workers are separated from other workers and thus union personnel.

Comparative research shows the Danish collective agreement based IR system creates less of a wage gap between natives and EU8/2-workers than the Norwegian law-based minimum wage (Friberg et al., 2014). But the stronger Danish unions can be rather aggressive towards employers and more often embark on industrial action than their peers in Norway and the UK so they also appear more aggressive to migrants. This explains the somewhat better enrolment rates of the weaker Norwegian and UK unions, which appear more appealing to migrants through an activist and inclusive approach (Eldring et al., 2012: 33; Mailand and Larsen, 2011: 60). Danish unions have a controlling role vis-a-vis industrial relations, which also makes it difficult to gain the trust of and hence organize the immigrants (Andersen et al., 2014: 98). Often there is an inherent conflict with unions targeting companies employing EU8/2-workers, e.g. firms without collective agreements (Mailand and Larsen, 2011: 39). But until now only few largescale explicit industrial conflicts have involved labour migrants or foreign firms.

The very low unionization rates of EU8/2-workers are problematic for Danish unions, and might impair the functionality of the Danish labour market (Arnholtz and Hansen, 2013). The associational strength of the labour market organizations is a necessary prerequisite to secure collective agreements in the workplace. Lower unionization rates also lead to scarcer resources at local union offices. Paradoxically, the strength of Danish unions could be pushing labour migrants away while securing them better conditions than other regimes.

Danish employers: Ambivalent and partly divided

As mentioned in the introduction employers might have different strategies and preferences depending on their market position and sector but are also affected by union strength (Afonso, 2012) with employers facing strong unions perhaps being forced to consent on their second-order preferences (Korpi, 2006). Afonso (2012) argues theoretically that we would expect employers in non-tradable sectors, especially when confronted by strong unions, to support wage regulation to prevent 'unfair' competition from outsiders paying lower wages. On the other hand, Afonso argues that employers in tradable sectors are likely to prefer no or less regulation, since they can take advantage of cheaper labour. But this pattern is not found in Denmark.

Several employers, especially minor subcontractors in the non-tradable cleaning sector, despite facing comparatively strong unions, are trying to take full advantage of the free movement of labour and thus fiercely try to avoid regulation of migrant wages. On the other hand, employers who follow the non-formal but yet highly institutionalized Danish wage system feel they encounter unfair competition (interview employer cleaning). This has led to disputes between employers as to whether to take advantage of the circumstances or stick to 'fair working conditions' and leaves Danish employers' associations divided or at least ambivalent (cf. Andersen and Felbo-Kolding, 2013). This is not in line with Afonso's (2012) assumption of uniform sectorial employer interests.

The Danish Service Sector's Employers' Organization (SBA) saw members terminate membership following this debate (interview employers' organization representative 2). Since then the SBA encourages minimizing the use of subcontracted workers and has published guidelines stating:

> It is not illegal or wrong to use subcontractors. … But they must be applied in an ethical manner. … SBA takes a strong position against companies in the industry managing such business models … or

> opposed to the collective agreements, so that it is detrimental to competition as well as the industry's image.[22]

Some employers argue they feel pressured to employ EU8/2-workers on conditions well below those set in collective bargaining to remain competitive (Andersen et al., 2014: 100). The same discussion is reflected among agricultural employers, e.g. in horticulture (interview local union representative 2; employers' organization representative 1).

The main divide between employers is thus not between sectors but rather between employers in the same sector. Most often the large companies are 'rule-followers', since they are more easily targeted in industrial actions by unions, whereas smaller companies and especially subcontractors often have below average conditions. The public discourse that underpaying migrant labour and thus undercutting Danish wages is unacceptable seems rather robust. So employers facing negative publicity, in particular media attention, sometimes consent to a collective agreement to avoid problems.

Outcome: Deteriorating working conditions through non-regulated work

The case studies show how some employers use labour migration to push towards weaker collective bargaining and lower wages by employing EU8/2-workers below the wage level set in collective agreements (cf. Dølvik, 2013b; Friberg et al., 2014). Overall this leads to deteriorating working and wage conditions with workers experiencing pressure on wage levels, working hours and conditions e.g. work pace and planning of hours (cf. Stuvøy and Andersen, 2013: 257), and could potentially result in future labour market segmentation as well as significant replacement of low-skilled natives in the affected sectors.

Despite many similarities between the two sectors there are also differences. Subcontracting to companies not covered by collective agreements is widely use in both sectors, while the use of posted workers is more common in agriculture. In cleaning widespread outsourcing of public cleaning has

[22] *Source*: sba.di.dk/SBA%20fokus/underleverandoerer/Pages/underleverandoerer.aspx (accessed 15 July 2014).

intensified this process, hence contributing to the destabilization of working and employment conditions (Hermann and Flecker, 2012).

Despite being low-wage sectors both agriculture and cleaning traditionally provided decent working and wage conditions for both migrants and natives, due to the low wage gap in the Danish labour market. So despite large shares of migrants especially in cleaning, neither cleaning nor agriculture have been a 'pure' segmented labour market, with migrants filling in positions that natives do not want, as described by Piore (1979).

The increased pressure has led to native workers lowering their wage claims, e.g. in the cleaning sector, where union members are accepting wages much lower than previously due to fiercer job competition (interview local union representative 3 and 4). This might lead to concession bargaining and, for example, the dominant metal industry union fears these wage pressures might spread (interview metal workers union representative 1).

EU8/2-workers have on average lower wages and more precarious working conditions than natives (Andersen and Felbo-Kolding, 2013; Arnholtz and Hansen, 2013; Friberg and Eldring, 2013; Friberg et al., 2014; Hansen and Andersen, 2008; Hansen and Hansen, 2009), which supports evidence of some labour market segmentation. In a recent survey among employers Andersen and Felbo-Kolding (2013: 11) found the wage difference between EU8/2-workers and natives to be 19% in farming, and this is most likely an underestimate. Native workers might consent on dualized pay agreements being paid at 'normal levels', while Eastern European workers are paid at lower rates. The Danish workers are in return accordingly granted some sort of job and wage security for not involving the union and sometimes even leaving the union (interview local union representative 2). EU8/2-workers are often paid the minimum rate set in sectorial collective agreements, without any local negotiations (Stuvøy and Andersen, 2013: 264). But Friberg et al. (2014: 43) finds Polish workers in Copenhagen earn on average 85% of the natives, which supports the argument that there is not a 'pure' segmentation effect with very low migrant wages.

Impacts of labour migration are typically unequally distributed, with low-skilled workers and other vulnerable groups, e.g. immigrants already in the country, more often experiencing adverse effects of the increased supply of low-skilled labour (Eldring and Schulten, 2012: 238–239; Krings, 2009: 54). Jensen et al. (2007: 25) found EU8/2-workers were replacing low-skilled Danish workers in the agricultural industry and this seems to continue. Whether replacement takes place depends on whether migrants are complementing or substituting native workers, which is disputed (see e.g. Borjas et al., 2008), but obviously also job content. But it seems clear that there are substitution effects in the sectors analysed where native and migrant labour very often perform the same type of work. Overall employment rates for natives with only primary education declined from 61.2 to 56.7% between 2009 and 2012 (Statistics Denmark, 2013), while employment for EU8/2-workers increased in the same period despite the crisis. Replacement might lead to short-term unemployment and adjustment costs for natives. But it might also result in medium- and long-term lower employment rates for workers with only primary education employment. But this depends on whether the migrants stay in Denmark and if they move into more skill-intensive jobs; for example, many of the Poles are overqualified for low-skilled work (Arnholtz and Hansen, 2013).

Conclusion and further perspectives

While EU8/2-workers account for only 3% of total Danish employment this article has identified more profound impacts in agricultural and the cleaning industry, where EU8/2- workers now represent significant shares of the employment. While both sectors have had below average wages the wage gap has been moderate but this might be changing. Despite internal disputes and ambivalence among employers intra-European labour migration is used by some employers to undermine wage levels, working hours, working conditions (e.g. work pace) and especially collective agreements coverage. Extensive use of subcontracted workers in both sectors as well as posted workers in agriculture results in large numbers of EU8/2-workers working significantly below the de facto minimum wages negotiated in collective agreements, thus creating low or unregulated work spaces where the institutionalized labour market regulation is not applied. The widespread outsourcing of public cleaning has exacerbated this in the cleaning industry. There are continuously media reports of very dire working conditions for some EU8/2- workers as well as other concerns like housing problems. This increases the risk of an ‘Eastern European proletariat’, which to some degree has happened already, working in low-status jobs and with pay and working conditions significantly below average.

But also native workers are increasingly affected by the declining working conditions and wages. There might be a replacement effect where especially marginal low-skilled native workers are being replaced by EU8/2-workers, who are willing to work at wage levels and working conditions native Danes will not accept.

The EU8/2-workers have significant lower unionization rates than natives which pressurizes in particular unions but also employers’ organizations and could alter the balance in the Danish labour market model, which is based on the strength of the labour market organizations. Intra-European labour migration is thus challenging the Danish IR system in the sectors analysed, but it has so far not lead to significant disruptions of the model, either at the national level or in the affected sectors. But the long-term outcome is still to be seen and it could be a drift away from the agreement-based model towards a less regulated labour market or towards more state interference.

To what extent does labour migration affect the welfare state in the Nordic countries?

This article has shown how intra-European labour migration is challenging the highly regulated Danish labour market. It causes downward wage pressure which might also put strain on welfare benefits, in particular unemployment benefits, especially following the current emphasis on work fare and ‘make work pay’ in Danish politics (Goul Andersen, 2011). If unemployment benefits are higher than low-end wages it would create downward pressure on benefits (or wages). When EU8/2-workers work at low wages and often not full-time, and meanwhile according to EU legislation could be entitled to social benefits in the host country, employers can basically pass the cost of the low wages on to the state, which renders some problematic incentives (Brochmann and Grødem, 2013: 71).

This raises questions on how intra-European labour migration in the future will intersect with the generous Danish and Nordic welfare states. Based on evidence in this article, there seems to be two paths emerging; either an undermining of the traditional Nordic labour market regulation which could lead to more state and legislative intervention, or a reconfiguration to accommodate the challenges. The former has to some extent happened in Norway with increased legislative action (Eldring and Schulten, 2012: 243–247), although from a different starting point (lower unionization rates and organizational strength) than in Denmark. Although there are advocates in the Danish debate for more legislation and political initiatives are discussed (Madsen, 2013: 18–19), for now it does not seem like a plausible development. Since the labour market organizations are trying to solve the issues within the framework of the voluntary IR system, without state intervention, this points to a reconfiguration. But this might only last as long as outcomes are not highly contested within the political system or as long as employers are not opting out of the established system.

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ARTIKEL IV OFFSHORING AND THE DOMESTIC ECONOMY – AN OVERVIEW OF SURVEY-BASED EVIDENCE*

by

Bjarke Refslund

Abstract

Offshoring, understood as the geographical relocation of companies' activities to another country, is a key feature of contemporary globalisation and has growing social, political and economic implications. While case-study research has provided solid knowledge about the phenomenon at firm and industry level, it is still rather poorly understood at aggregated macro levels such as the national or regional level. This is mainly due to the vast measurement problems associated with globalisation in general and offshoring in particular. Survey data has recently provided promising insights into the national scale and impacts of offshoring, including job losses, which are very difficult to measure with other methods. The contribution of this article is twofold: first, it provides an overview of survey-based findings on offshoring, and second, unique Danish survey data, which is combined with administrative panel data to assess the impact of offshoring on the domestic economy.

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Offshoring – a key element of global value chain production

With the ever-increasing international division of labour and expanding global value chains[1], offshoring has gained growing political as well as academic attention (Feenstra, 2010; Huws, et al., 2009; Gereffi, 2014). As manufacture and service production[2] alike become geographically more defragmented and functionally integrated (Dicken, 2011; Kierzkowski & Jones, 1990), firms' ability to relocate either entire lines of production or parts of the production chain has expanded dramatically. Offshoring may have wide-ranging political-economic impacts in both receiving and sending countries on such important areas as labour markets and job creation, skill composition and formation, industrial relations, competitiveness and macro-economic performance.

A rich literature of case studies has scrutinized offshoring at firm and industry levels at both the national and cross-national level, emphasizing important issues such as changing power relations, governance, employment implications, export performance and others (see e.g. Huws, et al., 2009; Haakonsson, 2009; Chiappini, 2012; Flecker, et al., 2013; Gomez, et al., 2013; Huws & Flecker, 2004; Hansen, 2014). While we have gained many relevant insights from case studies, our knowledge at the macro level, that is, the national or regional level, remains limited, especially when it comes to the job implications and the impact on the domestic economy. The main reason for the absence of macro data is the difficulty in providing solid measurement of offshoring and global value chains beyond case studies (Huws, 2009: 19-21; Sturgeon, 2013). The majority of macro analyses of offshoring are econometric analyses conducted on aggregated data, which is highly problematic since it renders out the vast and important heterogeneity between sectors and cases already identified by case-study research. Hence in political science macro analyses often tend to turn to, at best, anecdotal evidence or to extrapolating from past offshoring experiences that appear to

[1] While both the global value chain/global commodity chain (GVC/GCC) and global production network (GPN) frameworks are relevant here, we do not apply either, but just apply the chain-metaphor to illustrate the more integrated production.

[2] Here we in general refer to production of both goods and services, which are also becoming more integrated with each other (Zysman et al. 2013).

suggest a straightforward connection between job losses in the home countries and job gains in receiving countries (e.g. Sinn, 2011), or they simply do not investigate any macro-level evidence.

This article seeks to fill the knowledge gap between the abundant case-study research and the very limited macro data by providing, first, an overview of existing empirical survey-based research, and secondly, by providing findings based on unique Danish survey data on how the domestic setting interacts with offshoring. The Danish survey data has been combined with micro panel data from administrative registers covering the entire population of firms (with over 20 employees) and their employees. These data are analysed with the aim of providing evidence of the dynamic connection between offshoring and the domestic economy.

The article proceeds by first defining offshoring and then discussing the measurement problems at the macro level in the current approaches, especially econometric analysis. Then it briefly discusses the advantages of the survey approach (this will also be expanded in the methods section). In order to sort out the macro outcome, we then review the main theoretical arguments made in regard to offshoring before considering the existing empirical macro-survey data. The second part of the article presents the findings on offshoring and the domestic economy based on Danish survey data. The methodological section, besides introducing the general research method, also discusses the specific survey data. Finally, the implications for the social model are briefly discussed before the article's findings are summarized.

Definition of offshoring

Offshoring is by no means a new feature of contemporary capitalism (Fröbel, et al., 1977; Dunning, 1977), but there is still some confusion about the concept – and the term – in the social sciences (Refslund & Goul Andersen, 2014). Often 'outsourcing', 'offshoring', 'international relocation', 'international fragmentation', 'relocation' and 'international sourcing' are used either synonymously or without any clear definition. The definitions shown in Figure 1, on which some general consensus has emerged, may provide some clarification. Outsourcing thus refers to a task being contracted out of the company either domestically or internationally. Offshoring refers to a job, task or work process previously performed in the home-country being moved out of that country. This can happen within the company or conglomerate (intra-firm trade/production; also called 'in-house offshoring') or by subcontracting to an external partner ('offshore outsourcing'); in the following 'offshoring' is used to describe both of the latter categories.

The categories are ideal types, and several mixtures exist such as joint ventures or other types of mixed ownership. Foreign direct investment (FDI) is a broader category which may or may not involve the movement of production. FDI also encompasses genuine green-field production, where a new line of production is started up to serve a foreign market. It could theoretically be argued that this new production might as well have been placed in the home country; however this effect is impossible to distinguish for the home economy since the new production is not directly replacing any work processes.

Figure 1. Definitions of outsourcing and offshoring

<table>
<tr><td colspan="2" rowspan="2"></td><td colspan="2">Who performs the task?</td></tr>
<tr><td>Internal:
Within the firm</td><td>External:
Outside the firm
(Outsourcing)</td></tr>
<tr><td rowspan="2">Location</td><td>Domestic</td><td>Domestic in-house production</td><td>Domestic production by external partners:
National outsourcing</td></tr>
<tr><td>Abroad
(Offshoring)</td><td>Production within the firm/corporation:
In-house offshoring</td><td>Production by external partners abroad:
Offshore outsourcing</td></tr>
</table>

Following Feenstra & Hanson (1996).

A key problem with measuring offshoring is that it can be highly complex, and employment effects can be very difficult to sort out. Consider an example of a factory in country A that employs 200 workers, and this factory is offshored to country B. However, imagine that the new factory in country B is to employ only 100 workers. This may reflect that the new factory is more efficient, but it may also partly reflect that some of the input to production in the new factory is sourced from an external partner in country B (perhaps in a joint venture with a local company) employing 25 workers and only producing for the main company. Yet another part of the production inputs may be sourced from the home country A, where a factory employs 50 workers, but produces for five different companies. This example (which could easily be even more complex) shows how complicated it often is to identify the job effects of an offshoring process. Furthermore, offshoring can also generate new employment in the home country by increasing demand or creating new jobs for example in design, marketing and other areas. Thus far the majority of studies investigating numerical outcomes at the macro level have been econometric analyses (Refslund & Goul Andersen, 2014).

Problems with the measurement of offshoring and the problematic econometric analyses

As stated above, we have solid knowledge of the impacts of offshoring from many insightful case studies at company and industry level, as well as from cross-country sector and firm studies, but our knowledge at macro levels remains limited. One of the main reasons so few studies have dealt with the numerical implications of offshoring at the macro level is the problem of measuring offshoring in a meaningful way (Huws, 2009; Sturgeon, 2013), reflecting the more general measurement problems in economic globalisation, which results in a lack of solid macro data (Sturgeon & Gereffi, 2009; Sturgeon, et al., 2013).

Different academic disciplines have investigated the impacts of offshoring more comprehensively at the macro level. These include economic geography and business studies, but especially management studies (e.g. Pedersen, et al., 2013) and economics (see e.g. Feenstra, 2010 and Crinó, 2009; Stehrer, et al., 2012 for overviews). There is even an 'Oxford Handbook of Offshoring and Global Employment' (Bardhan, et al., 2013). Academic attention on the other hand has been more modest within political science and sociology[3] despite the potentially wide-ranging implications for society in general. In the light of the measurement problems, the main strand of literature trying to investigate the macro outcomes of offshoring has thus far been within economics, mainly econometric analyses. It is problematic that the social sciences have not done much other macro research on the topic besides this econometrically based research, since it creates a somewhat misleading picture of the consequences and outcomes of offshoring at the macro level.

In the econometric literature offshoring has traditionally been operationalized by using input/output data from already existing trade statistics, and typically applying sector-wise imported inputs to production as a proxy for offshoring. But offshoring is, as discussed above and as shown in Figure 1, far too complex to be adequately measured in trade statistics using foreign inputs to production as a proxy (Castellani, et al., 2013; Sturgeon, et al., 2013). The level of measurement is also too aggregated, and we have seen highly differential results from complex econometric analyses using the same data sets and techniques (Stehrer, et al., 2012: 15). The lack of sector-based input-output data means that most econometric analyses make a proportionality assumption, that is, all sectors are 'assumed to import each material and service in the same proportion as its economy-wide use' (Winkler & Milberg, 2012: 40). This assumption can have significant impacts on research results, even altering findings on offshoring's effect on labour demand entirely. Winkler and Milberg (2012) demonstrate for German data (in which one can differentiate between domestic and imported inputs at the sector level) how the employment effects of service offshoring changes the outcome from positive or neutral to a negative one when the sector-based data are applied. Econometric analyses also ignores labour-market segmentations, power asymmetry between buyers and suppliers, government regulations and corporate strategies as well as potential problems of unemployment, trade imbalances and financialization (Milberg & Winkler, 2013; Milberg & Winkler, 2010a; Refslund & Goul Andersen, 2014).

[3] For exceptions within political science and sociology see (Margalit, 2011; Gomez, et al., 2013), and for a seminal economic account drawing on a broad variety of disciplines, see Milberg & Winkler (2013).

In light of these major problems facing the econometric literature and the very limited statistical evidence besides this dominant approach, the survey approach has resulted in very interesting and comprehensive research on the actual offshoring decision and how this decision affects employment and other aspects.[4]

Promising insights from survey data

Another important reason for the measurement problem is that offshoring decisions are made at firm level as part of firm strategy, which is per se difficult to measure. The implications, not least for employment within the single firm, are difficult to separate from other factors that affect production decisions like market changes for example. Though global value chain (GVC) analyses of a single product line can identify the employment implications and value added for each part of the production chain, this approach is too demanding if we want insights into the overall economy (Sturgeon, et al., 2013: 314-15). We therefore turn to the survey approach as the most promising way to gain insights into the macro level implications of offshoring.

In the survey approach, firms are asked specifically about their offshoring activities either on written questionnaires or in interviews. This has the obvious advantage that we deal explicitly with the phenomenon as opposed to the use of various statistical proxies. The survey approach gives the researchers opportunities to inquire about various aspects of the offshoring decision, in particular the employment effect that is very difficult to assess with other methods. The potential pitfalls are the usual ones with questionnaires: whether the respondent is the right person to answer the question in the first place, whether the respondent understands the question and has the knowledge to answer correctly, and finally whether the respondent wants to give the researcher the correct information at all. But a carefully designed survey should be able to bypass most of these pitfalls and

[4] For a more extensive discussion of the measurement problems and discussion of alternative measures like the number of workers participating in trade-replacement programs and media reports, see Refslund & Goul Andersen (2014).

provide us with solid data on offshoring that better captures firm-level offshoring and employment implications (Sturgeon, 2013: 41).

Only a few large-scale cross-national surveys on offshoring have been conducted, among them two seminal European surveys coordinated by Eurostat.[5] Other systematic surveys include a recent and comparable, but somewhat smaller US survey (Brown, et al., 2014) and a Canadian survey (Boileau & Sydor, 2011), as well as the European Manufacturing Survey (Dachs, et al., 2012; Stehrer, et al., 2012) which includes only manufacturing companies. For the analysis in this article we use the unique and extended Danish version of the latest Eurostat survey to provide new insights into which firms engage in the global economy and how they differ from firms that don't engage in offshoring.

The implications for domestic economies, not least their scale and scope, have been discussed rather extensively theoretically (perhaps as a consequence of the problems of empirical measures). Thus before we review the existing macro data we briefly look at the theoretical discussion over offshoring.

Theoretical approaches to offshoring

Offshoring is seen by some neo-classical economists as the natural extension of the Ricardian comparative advantages, only now taking place in smaller parts or niches of the overall production, or in 'tasks' (Bhagwati, et al., 2004; Grossman & Rossi-Hansberg, 2008). But moving beyond text-book economics, the offshoring decision is much more complex and dynamic than the basic 'make or buy' choice in classical trade theory (Jensen & Pedersen, 2011; Milberg & Winkler, 2013; Dunning, 1977). Many factors can influence the offshoring decision, although in most cases cost reduction, mainly in wages, is paramount. Other important aspects may include access to new markets, highly qualified labour, production clusters and natural resources, but also institutional settings like labour-market, environmental and other governmental regulation, as well as corporate and

[5] See Statistics Denmark (2008) for a summary of the first survey covering 2001–06 and Eurostat (2014) for the second survey covering 2009–11.

management strategies can have a significant impact on the decision. Unforeseen costs and problems arising from, for example transportation, tariffs and taxes, managerial problems, increased coordination needs and diverging quality, potentially reduce the incentives for offshoring. Competitive advantages of industrial clusters, institutional competitiveness and the immobility of many competences also means that companies very often find it difficult to escape 'the pull of geography' (Dicken, 2011: 69–71; Kogut, 2004).

Another obviously important element is whether the actual business function or job is 'offshorable' in the first place. According to Blinder and Krueger, there are two main criteria for whether a job can be offshored: Firstly, does it have to be performed in a certain location (e.g. building a house), and secondly, can it be performed in a remote location without quality loss (Blinder & Krueger, 2013: 104)? A variety of measures led Blinder and Krueger to conclude that roughly 25 % of all US jobs are offshorable. This amount is very significant, but, that jobs are theoretically considered offshorable does not mean they actually will be offshored. A Danish study of self-reported 'offshorability' found that only relatively few Danish jobs could be moved (Eriksson, 2009: 15), which could indicate that some nations are more prone to offshoring than others. Industry and job structure, and/or jobs requiring intensive verbal communication (e.g. call centres) may mean that some countries (English-speaking ones in many cases) can more easily move (or host) companies offshore.

While many neo-classical economists emphasize in line with the Ricardian trade axiom the potential positive outcome of offshoring (e.g. Bhagwati, et al., 2004; Mankiw & Swagel, 2006), prominent critics including Nobel laureate Paul Samuelson have questioned the Pareto-efficiency of international trade, including offshoring (Samuelson, 2004; Milberg & Winkler, 2013; Gomory & Baumol, 2013). The optimistic analyses emphasise the increasing productivity and competitiveness of offshoring firms, which leads to growth through cheaper goods and services and expanding markets abroad, increasing demand and potentially new and better jobs in the home country in areas such as marketing, coordination and design. Critics on the other hand claim that offshoring leads to disinvestment in the home country, lowering overall demand and potentially creating unemployment and falling wages (Gomory & Baumol, 2013: 29). Besides power asymmetry in global value chains, the question also arises whether international trade is always Pareto efficient and as harmonious as predicted by the Ricardian trade axiom (see e.g. Gomory & Baumol, 2013; Milberg & Winkler, 2013; Samuelson, 2004). Offshoring might also lead to increased financialization and profit shares in national income through higher profits being turned into higher dividends and share buybacks rather than reinvestments that could increase productivity, growth and hence employment (Milberg & Winkler, 2010b, 2013; Levy, 2005). So while the profitability of the offshoring firm might increase, the overall welfare gains are more ambiguous, especially since there is general agreement that in global trade there are losers as well as winners (especially in the short run) among both capital and workers but also among different groups of workers such as high- and low-skilled workers. If international trade is to be Pareto efficient it requires that the losers are compensated, but, as argued by Blinder (2007: 24 emphasis in the original), '… trade liberalization is not, repeat not, a Pareto improvement unless the losers are actually, not theoretically, compensated – which they never are'.

Milberg and Winkler (2013) point out four dynamic effects of offshoring: the 'mark-up effect' lowers input prices which, together with a 'scale effect', increases demand (also for labour). The 'substitution effect', with local labour and capital being replaced by foreign inputs, on the other hand reduces domestic demand, as does the increasing productivity effect, but the productivity gains also lower prices. These dynamic effects are difficult to separate, and are influenced by institutional settings such as labour-market institutions, which also make the overall (theoretical) outcome ambiguous.

Finally, offshoring is often claimed to have a strong impact on bargaining power on the domestic labour market: the pure threat of offshoring may dampen wage demands or lead to concession bargaining (Rodrik, 1997; Bonoli, et al., 2000). Piore (1998) argues: 'Merely management's credible threat of moving production offshore […] can induce vulnerable workers or their unions to settle for wage concession or benefit reductions.' (here cited from Milberg & Winkler, 2013: 179). Besides affecting bargaining power on the labour market, offshoring could also affect political choices, when companies threaten to relocate production because of taxation or environmental legislation, although this type of relocation rarely seems to actually happen. In the Danish survey hardly any firms said that taxes and other regulation had affected their decision to offshore. So it could be said that the impact of offshoring is mainly discursive, as claimed by Schmidt (2006: 11); ‘The real problem is not outsourcing [*n.b. – termed ‘offshoring’ in this article*] per se but rather the general need to adjust systems of work and welfare to meet the competitive challenges posed by outsourcing […]. People feel vulnerable to outsourcing […] even if they are not objectively so…’.

Theoretically, the outcome of offshoring remains disputed mainly because the dynamic outcome renders the employment impact, and the overall welfare implications, an open question that has to be solved empirically, not theoretically. We therefore need to investigate the empirical implications through case studies as well as solid aggregated data such as survey data, since the outcomes are highly contingent on, among other things, institutional factors such as labour-market performance (Milberg & Winkler, 2010a), but also on general economic and industrial structures. We therefore review the empirical macro evidence already at hand before presenting our own findings.

Review of existing macro evidence on offshoring

The impacts of fragmentation of work and labour processes have to be understood dynamically (Flecker, 2009). This is also the case with offshoring, the overall effects of which have to be sorted out empirically. Since the employment outcome of offshoring is the main concern among the media, the public and policy-makers, the majority of studies emphasize employment effects, in particular for workers with only tertiary education. This article argues that survey data holds promising insights. In this review we mainly focus on survey data including the comprehensive Eurostat surveys, although references are also made to other studies. Before turning to the job and wage outcomes, some generalized findings on offshoring are presented which are confirmed in the majority of studies.

Offshoring mainly takes place in manufacturing industries (Brown, et al., 2014; Eurostat, 2014), but offshoring of service tasks is rapidly growing as modularisation and digitisation of wide arrays of service work is intensified (Flecker, 2014; Huws, et al., 2004; Flecker, et al., 2013). Offshoring more often takes place in larger firms which can more easily offshore either some operations or specific business functions, for example business services like ICT, design or marketing (Dachs, et al., 2012: 6; Boileau & Sydor, 2011; Eurostat, 2014). While some industries have seen substantial offshoring from an early historical stage, such as the automotive (Dachs, et al., 2012), textile and clothing industries (Fröbel, et al., 1977; Olsen, et al., 2004), others have experienced only limited offshoring. Obviously there are also big differences in the levels of internationalisation of countries; the small open economies of Europe display higher levels of offshoring than the bigger countries like Germany and France (Stehrer, et al., 2012; Eurostat, 2014). In the less internationalized US economy, 23 % of the firms stated in a survey that they had offshored at some point in time (Brown, et al., 2014). In Europe[6] this figure ranged from 25 % in Denmark to practically zero in Lithuania (Eurostat, 2014), but covered only the period 2009–11. Thus European companies have probably offshored more, especially since in many West-European countries offshoring took off already in the late 1970s and early 1980s (Fröbel, et al., 1977). In the first Eurostat survey, 16 % of the European firms said they had offshored at some time between 2001 and 2006 (Statistics Denmark, 2008).

While at least a quarter of the firms in countries like Denmark and US have offshored, we know less about how much activity the firms actually offshored. In the Danish data presented below, 7 % of the offshoring firms had done so without any job reductions. This could imply that only minor tasks were offshored, and 63 % of the firms indeed moved 10 or fewer jobs. US survey data indicates that only a minor part (3–5 %) of the firms' overall activity (here measured as cost) was offshored (Brown, et al., 2014: 3). It appears that European offshoring has slowed down during the crisis (Dachs, et al., 2012; Eurofound, 2013: 63–67; Stehrer et al., 2012: 91). This would be expected since firms tend to consolidate rather than expand their activities during times of crisis.

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[6] Fifteen European countries took part in the survey, but important countries like Germany and UK did not participate.

When companies offshore, they most often offshore support functions (like logistics or IT) rather than core functions, and they typically offshore within the firm to subsidiaries abroad (in-house offshoring), whereas offshore outsourcing (to external partners) is more rare (Eurostat, 2014). While it often seems in the literature and the public debate as if most offshoring were to China and other low-wage countries (see e.g. Thun, 2008), the most common offshoring destinations are inter-regional and other high-wage countries, in both the European and US surveys (Brown, et al., 2014; Eurostat, 2014). This confirms that proximity remains important in offshoring decisions. The new EU member-states in Eastern and Central Europe (EU10), which have significantly lower wage levels, are important offshore destinations for EU15 countries, especially for manufacturing companies, and India and China also remain important destinations (Dachs, et al., 2012: 18; Stehrer, et al., 2012: 95; Eurostat, 2014). Often the decline in EU15 manufacturing employment has been associated with increasing employment in EU10 (as well as China). However this was true only before the crisis (Eurofound, 2013: 50), since manufacturing employment declined after 2008 by 11–12 % in EU15 as well as in EU10.[7]

Another consistent finding is that the paramount motive for offshoring is cost reduction (labour costs and other cost, see Refslund & Goul Andersen, 2014: 34-37). In the Danish survey, 78.5 % of the offshoring firms said that cost reduction was either important or very important for the offshoring decision, but motives can be complex and intertwined (Jensen & Pedersen, 2011), and almost half of offshoring firms underestimate the costs involved with offshoring (Larsen, et al., 2013). The importance of the cost motive did actually decline (although only slightly) in several countries, including Denmark, between the two Eurostat surveys (Eurostat, 2014), reflecting that most of the cost-efficiency-seeking offshoring might be behind us.

The overall direct impact on employment is found to be modest, compared to other causes of job reductions (see Refslund & Goul Andersen, 2014: 37-40 for an overview; Stehrer, et al., 2012: 19). The Eurostat Survey shows only 83,000 jobs were lost between 2009 and 2011 in the 11 countries for

[7] Author's own calculations on Eurostat/SBS-data.

which data is available (Eurostat, 2014). Previous research has shown that offshoring only accounts for only 2–4 % of job separations in Europe and Japan (Kirkegaard, 2007) and the US (Mankiw & Swagel, 2006). While a few studies report higher numbers, these remain modest: Milberg and Winkler (2013) find that US offshoring led to a decline of 3.5 million fulltime jobs between 1998 and 2006, and although the number is high, it is a small share of overall US job losses.

There could however still be very significant indirect employment effects such as accompanying service-job losses, which need to be further researched, e.g. through case studies. The indirect consequences might have a decisive impact on the structural labour demand and hence also a spillover effect on wages. The total impact on labour demand depends on the dynamic interaction between the different effects, as Milberg and Winkler (2013) point out. They find that offshoring in general lowers the labour demand for both lower- and higher-skilled workers, though the traditional argument in the literature has been that especially low-skilled workers are more affected. However increased service offshoring has meant that more jobs demanding high-skill qualifications are being offshored (Blinder, 2007; Huws, et al., 2004; Flecker, et al., 2013; Flecker, 2014), and around one-fourth of the offshored Danish jobs were high-skill jobs. But low-skilled workers and to some extent medium-skilled workers are still affected most, as previously (Milberg & Winkler, 2013: 300). Finally, previous European research shows that externalisation of production or services (both offshoring and outsourcing) can have a negative impact on working conditions (Flecker, 2009; Marchington, et al., 2005).

After this overview of the key findings in the survey-based literature as well as the theoretical literature, we now turn to the distinctive Danish survey data. First the survey data and the methodology will be presented before the article’s main findings. Finally we briefly discuss how the Danish social model and offshoring interact, after which the article's main arguments are summarized.

The unique Danish survey data and research method

The survey data used in this article was gathered as the extended Danish section of the 2009–11 Eurostat survey carried out in 2012 (see Eurostat, 2014). Since the survey was compulsory for Danish firms, the data set basically covers the entire firm population, which makes it exceptional internationally. The response rate was 97 % for companies with more than 50 employees in the private business economy and 96 % for companies with 20–49 employees (covering manufacturing and business services). In order to cover the full population of firms the data from the few non-respondent companies have been imputed by Statistics Denmark based on a modelling technique of other similar companies in the survey. This provided us with a data set consisting of all companies with more than 20 employees, in sectors where we theoretically would expect offshoring to take place.

The literature review confirmed that offshoring mainly occurs in larger companies (the threshold in the Eurostat-survey was 100 employees). But the inclusion of small- and medium-sized companies (SMEs) in the Danish survey is important since their involvement in the international economy is growing (Rangan & Schumacher, 2013). Offshoring is becoming increasingly feasible for smaller firms through offshoring of smaller portions of production, or support functions like IT and other business functions. In the small and open Danish economy SMEs (20–49 employees) accounted for 11.5 % of the offshored jobs, and when SMEs with 50–99 employees were included the share rose to 23.8 %, confirming that SME-offshoring is a significant contribution. The threshold of 100 employees in the Eurostat-survey could mean (if Danish figures are comparable) that the Eurostat-survey underestimates the overall job loss by as much as one-fourth.

In the survey the firms were asked about their offshoring activities between 2009 and 2011. The survey took a business function approach (see Huws, 2009; Sturgeon, et al., 2013) whereby the firms' economic activities were divided into core activities and support functions like marketing, research and development etc. Often business functions rather than specific job functions are offshored, with firms often reconfiguring activities in the offshoring process (Rangan & Schumacher, 2013; Sturgeon, et al., 2013).

Key issues in the survey were: how many jobs were offshored, to what country, whether to an external partner or a subsidiary firm, what motivations and barriers existed, whether any domestic jobs were created in the offshoring process, whether the firm was part of a corporate group (as head or subsidiary), as well as a range of other significant aspects of the offshoring and international relocation process (the questionnaire had around 140 questions). Since the data covers only offshoring occurring in a specific time period (2009–11), gives no information about previous offshoring, and the additional data from the administrative register only gives information for a few years after 2009–11, we refrain from longitudinal analysis. But future research may investigate the longitudinal consequences of offshoring by comparing employment, productivity development and growth rates among offshoring and non-offshoring firms, as has been done by others with the 2001–06 Eurostat survey data (Timmermans & Østergaard, 2014; Nielsen & Tilewska, 2011).

In the remainder of the article we present and analyse the Danish survey data in combination with Danish administrative register data. The Danish register data is very encompassing and covers all individuals and all firms for a very wide variety of variables. The firm data we utilized include turnover, industry, export, employee and wage structure, as well as information on employees' educational level, unionisation rate, etc. The survey and register data were matched so that the analysis contained the full population of the survey.[8] The methodological approach of combining survey data with administrative register is still being refined but has already provided interesting research results (e.g. Statistics Netherlands, 2011; Timmermans & Østergaard, 2014; Nielsen & Tilewska, 2011).

Offshoring and the domestic economy – evidence from Danish survey data

This section provides us with new insights on the scope and scale of offshoring and how these affect domestic developments as well as other

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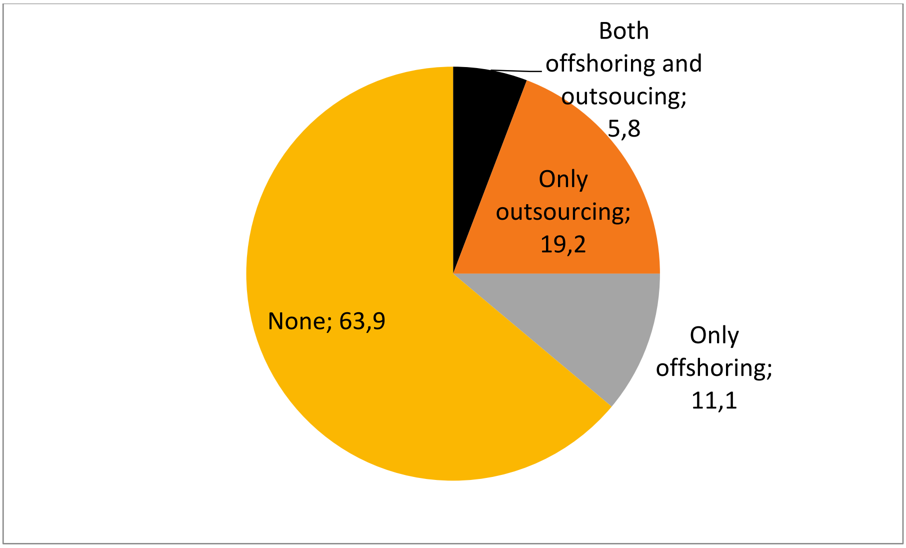
[8] Some firms and employees could not for different reasons be identified from the survey in the register data, but this was only a minor share, so not believed to have made any significant impact on the results.

aspects like the offshore destinations and the main motives for offshoring. All results are based on the data described above.

Overall, 16.9 % of the Danish companies had offshored some processes or business functions between 2009 and 2011, thus confirming that Danish firms are among the most internationally engaged in Europe (Eurostat, 2014). The survey also has data on domestic outsourcing (hereafter 'outsourcing'), which is almost completely lacking internationally (Sturgeon, 2013: 31). Among the firms in the survey 25 % had outsourced, which shows outsourcing is still more common than offshoring. As shown in Figure 2 below, 5.8 % of the Danish firms engaged in both outsourcing and offshoring. The data confirms that larger companies more often offshore: the offshoring firms had an average size of 287 employees compared with 138 employees for non-offshoring firms.

Figure 2. Danish firms engaged in offshoring and outsourcing



N=4461

Offshoring is a significant phenomenon with around 17 % of all firms offshoring in the short period examined, but the direct job effect is more modest. The firms were asked specifically how many jobs they had moved offshore; altogether Danish firms reported that 19,045 jobs were lost to offshoring between 2009 and 2011. This equals roughly 6350 jobs per year, which is a minor impact in a labour market of more than 2.6 million employees with around 1.5 million employees in the private sector, where the offshoring took place. We assume that there was no offshoring in the public sector, although this may be debatable. But as discussed earlier, there might be significant indirect job losses and indirect consequences which the survey did not cover. The indirect job losses are also difficult to measure since they typically occur at subcontractors or at companies even more indirectly linked to the offshoring company. The companies that offshored moved 25 jobs on average, but there were large differences, with 63 % of the companies moving 10 or fewer jobs, and one company offshoring as many as 800 jobs. Figure 3 shows the difference in job development between the offshoring and non-offshoring firms. The difference is not very large in firms that had a job growth, but the offshoring firms had a significant higher tendency to reduce jobs than non-offshoring firms. This indicates that offshoring has a direct job impact in the firms.

Figure 3. Job development in offshoring and non-offshoring firms

	Offshoring	
	No	**Yes**
Increasing employment	35,1 %	32,7 %
No changes in employment	29,0 %	19,5 %
Declining employment	35,9 %	47,8 %

N=4461

Of the jobs lost 26 % were high-skill jobs (requiring tertiary education). The survey did not specify the educational level of the remaining jobs lost. The negative employment implications very often take the public agenda but we must remember that offshoring is a two-way street that includes job gains from processes moved from other countries to Denmark (which would be offshoring from that country). In a recent Danish company survey 10 % of the firms stated they had moved production to Denmark (Arlbjørn & Mikkelsen, 2014), but this figure seems high compared to our full population data, whereby only 1.7 % of the firms had moved production to

Denmark. There can also be job gains in connection with the outward offshoring processes, such as jobs in logistics and management, with 1459 jobs created compared to the loss of 19,045 jobs. Of the created jobs 44 % were high-skill, so the percentage of high-skill jobs created is higher than that of those lost.

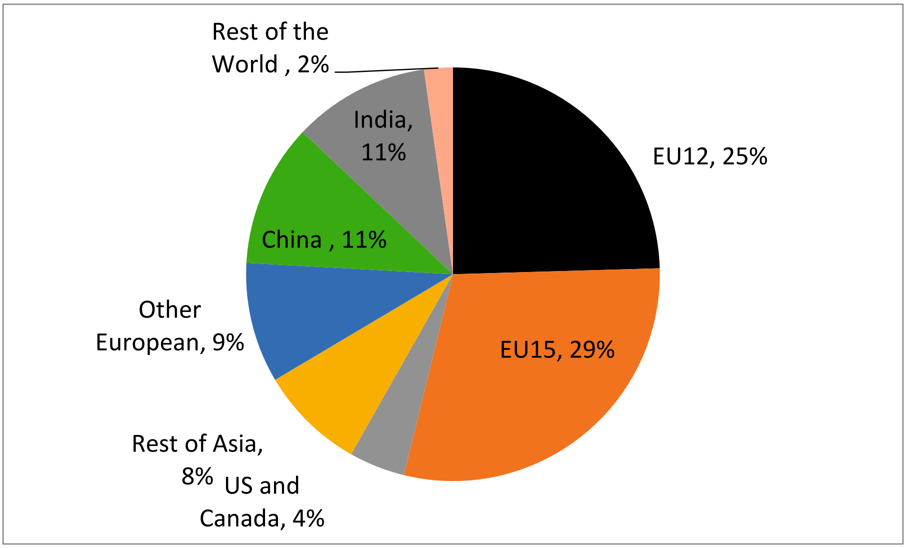
Despite the growing importance of service offshoring, manufacturing companies still offshore more (21 %) than service companies (16 %), and the overwhelming majority of the job losses (63.2 %) occur in manufacturing and only 34.3 % in services. Very often offshoring analyses are on a highly aggregated industry level since the data do not allow a more refined analysis, but our survey data can be broken down into the most advanced industry codes in NACE (Statistics Denmark use an even more refined system than NACE, with 730 branches of economic activity). On a more aggregated level (36 industry groups), the industries with most jobs lost from offshoring were machinery and equipment manufacturing (cat. CK) with 3164 jobs lost (16.6 % of all jobs) and IT and other information services (cat. JC) with 2488 jobs lost (13.3 %). Figure 4 shows in absolute numbers the economic categories (on the most detailed level) in which most firms had offshored. Offshoring most often occurred in computer programming activities, which again confirms the growing importance of service and business services offshoring (Flecker, 2014; Huws, et al., 2004; Gomez, et al., 2013).

Figure 4. Sub-industries with most offshoring firms (Danish DB07)

Industry	**N (firms)**	**Percent of overall offshoring**
Computer programming activities	52	6.9
Wholesale pharmaceuticals	17	2.3
Manufacture of instruments and appliances for measuring, testing and navigation	15	2
Computer consultancy activities	15	2
Manufacture of other fabricated metal products n.e.c.	14	1.9
Manufacture of other plastic products	14	1.9

While offshoring is very often closely associated with de-industrialisation, the correlation is more blurred in our data, although we can probably not extrapolate this finding to other periods because of the economic crisis. Offshoring accounted for 12,043 jobs lost in manufacturing between 2009 and 2011, but the same period manufacturing generally saw a decline of almost 70,000 jobs,[9] so offshoring accounts for 17 % of the jobs lost, which makes it an important contribution, although not the most substantial. Thus, the majority of jobs lost in Danish manufacturing in this period were not offshored, but were simply lost without any direct relocation.

Figure 5. Destinations of Danish offshoring



Calculation based on offshored tasks (firms can have multiple destinations)

More than 60 % of Danish offshoring takes place within Europe as shown in Figure 5 above, with the old EU15 countries still the most frequent destination, which shows that proximity is still very important and the offshoring decision concerns more than just lowering costs (Huws, et al., 2009; Jensen & Pedersen, 2011). Offshoring of core tasks, which makes up 36 % of all offshoring and typically emphasizes cost reductions, are still mainly to low-wage countries. The EU12 receives 30 % of the core tasks

[9] Statistics Denmark (RAS11).

and China 18 %, while only 18 % of the core tasks were moved to a EU15 country.

A unique possibility in the Danish survey data is to analyse the correlation between firms’ unionisation rates and the use of offshoring. Unionisation had no significant impact on the offshoring rate. The offshoring firms had a unionisation rate of 56 % compared to 58 % for the non-offshoring firms (the impact was insignificant in statistical analysis). Further detailed analysis shows that companies who engage in outsourcing and were members of an enterprise group or head of an enterprise group have a greater propensity to offshore, as do firms that have subsidiaries abroad or use international suppliers. This could reflect the fact that firms previously having established production abroad have easier access to offshoring since they already have experience operating abroad and contacts to potential offshoring partners (cf. Refslund & Goul Andersen, 2014).

Offshoring and social systems: Some remarks on the Danish experience

How national economies perform in the environment of increasing global division of labour, where firms have easier access to offshoring, depends on political and socio-economic characteristics and institutions. How workers (in particular low-skilled) are affected depends on social systems and national labour markets' performance and regulation (Milberg & Winkler, 2010a; Gomez, et al., 2013). Other key features include national innovation and production systems (Lundvall, 1992), the educational level and flexibility of the labour force, firms' ability to adjust, the economy’s ability to create new jobs and especially the ability to facilitate reallocation of workers from declining to expanding industries. The highly flexible Danish production system seems to perform well under these changing circumstances, despite (shown consistently across available surveys) having one of the highest levels of offshoring among industrialized countries (see Refslund & Goul Andersen, 2014 for an overview). Danish workers thus far have experienced only minor negative impacts of globalisation, even in industries that literally have been completely offshored, like the textiles industry (Olsen, et al., 2004; Refslund & Goul Andersen, 2014). This is explained by the Danish work force’s high flexibility and educational attainment level together with ongoing skills-upgrading, which compensates for the decline in low-skill jobs (Refslund & Goul Andersen, 2014).

The Danish economy and its companies (and their Nordic counterparts) seem well suited to adjust to international competition (Kristensen & Lilja, 2011; Refslund, 2014; Ali-Yrkkö, et al., 2011). The high level of offshoring among Danish firms is thus also a reflection that Danish firms are able to actively take advantage of globalisation.

Conclusion

Offshoring, here defined as firms' international relocation of production or service, is a prominent feature of the increasing internationalisation of production and thus of contemporary economic globalisation. Offshoring is increasingly affecting national economies' employment, jobs creation, wage setting and skill structure as well as macro-economic performance in terms of competitiveness. Although offshoring may not be the 'third industrial revolution' as claimed by Blinder (2006), its impacts can be very significant and widespread and constitute a change in the mode of production. But despite offshoring's growing importance and the potentially vast implications for states, our knowledge of the phenomenon at the aggregated level remains limited, though much detailed case-study research has provided valuable insights into the firm- and sector-level phenomenon. This article contributes, first, a review of theoretical arguments on offshoring in the broader literature and an overview of existing macro-level evidence, mainly survey data. Secondly, the article presents evidence from a very detailed Danish survey of all the Danish firms from which we should expect to see offshoring activity.

From the review of existing research as well as the analysis of comprehensive Danish survey data, this article has shown how the impact of offshoring appears at first to be modest, at least when it comes to the employment impacts in numerical terms, with internal restructurings and bankruptcies are far more important in explaining job reductions in the business economy. However there are most likely more significant impacts of offshoring on the nature of both work and work organisation: offshoring or the mere threat thereof can alter power balances in industrial relations, as well as increase firms' pressure on nation-states to ease their taxation and environmental regulation, for example. While the direct impacts of offshoring at the macro level appear somewhat restricted, there might be more profound indirect and substantial consequences, such as adjustment costs (both short- and long-term) for the labour market, in particular for low-skilled workers, as several case studies have pointed out. Indirect job losses associated with the relocation of jobs such as service jobs and business services can be significant, and future research needs to investigate this in further detail. In measuring employment effects and socio-economic implications it is important to acknowledge that offshoring is a dynamic and ongoing (never-ending) process and often firms' preferences and choices change fast. Also such things as changes in the costs of wages and transportation, new technologies, the growing importance of proximity, and political uncertainty – above all armed conflicts – can quickly change the currents of offshoring. Crowdsourcing, as a form of offshored service work, adds a 'placelessness' to those activities and could be similarly altering the dynamics of service work (Flecker, 2014).

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ARTIKEL V UNDERSTANDING THE DIVERGING TRAJECTORIES OF SLAUGHTERHOUSE WORK IN DENMARK AND GERMANY: A POWER RESOURCE APPROACH

by

Ines Wagner* and Bjarke Refslund

Abstract

This article provides a comparative analysis of institutional and regulatory changes in the German and the Danish slaughterhouse industry in the face of an increasing international competitive environment. The case study findings show how the Danish industry has maintained comparatively very good working conditions, while it has deteriorated radically in Germany with wide-spread workforce dualisation especially of subcontracted migrant workers. When studying changes within the same sector across but in two different institutional settings, we are able to analyse how different theories contribute the explanation. Findings show how power resource theory can explain much of the variation and thus bridge the gap between regime theory and liberalisation theory.

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Introduction

Increasing international competition and pressure for liberalisation of labour markets and industrial relations affects basically all sectors across European welfare states. The slaughterhouse sector in Denmark and Germany is a prime example of this trend. While the wages and working conditions in the pig meat industry in the two countries were almost similar two decades ago (Strandskov et al. 1996; Refslund 2012) they are now completely different. Since the 1990s the slaughterhouse industry in both countries has faced the same pressure from international competition, liberalisation and Europeanisation. However, the Danish industry has maintained comparatively high wages and good working conditions, while working conditions and wages have deteriorated radically in Germany with wide-spread workforce dualisation and increasing labour migration inflows, facilitated by European integration.

In this article, we examine how the local institutional context helps explain this cross-national variation. Findings are based on a comparative study of the meat industry in Germany and Denmark. When studying the same industry across two different institutional setting we can test how well theories of power resources and liberalisation help explain the variation. This approach allows us to examine closely how stakeholders negotiate within the local institutional contexts and how these contexts affect employee interests. We ask: how does the institutional setting determine the respective sectorial development? More specifically, how can the labour movement power account for these differences?

The analysis shows that while the Danish case seems to confirm the theoretical insights of the welfare regime theory (Esping-Andersen 1990; Hay & Wincott 2012), the findings in the German case study are more in line with the arguments in the liberalisation theory. We argue the key variable in explaining this observed difference is the unions' power position. Following the power resource theory (Esping-Andersen & Korpi 1984; Korpi 1983; Stephens 1979) but also Esping-Andersen's welfare state typology, which understands power not only through high membership rates, but also as institutional strength partly embedded in the national system, we argue that political-economic analyses should be more attentive to power resources since these are conditioning the impact of liberalisation and globalisation.

We focus on the meat industry because the developments of social dumping practices have not only caused havoc in the German labour market. EU countries such as Belgium, France and Austria accused Germany of unfair competition practices due to employing posted workers under ‘dumping’ wages (EFFAT 2013). French workers protested against social dumping practices in the German meat industry because it hurts French jobs (Die Zeit 2013). Moreover, Danish slaughterhouse workers and politicians have raised the issue of social dumping in the pig meat sector.

The article proceeds as follows. First, we will develop the theoretical framework including theories of institutional change and how a power resource approach can help explaining diverging trajectories. Second, we discuss the method and the European meat industry structure. Third, the in-depth case study examines how the institutional setting in the Germany and Danish meat industry influences the divergent trajectory. Finally we discuss the outcome with relevance to institutional setting including union strength, collective bargaining as well as employers’ organisation before we conclude.

Liberalisation, Convergence or Divergence? Two sides of the same coin

The existing literature provides different accounts on how advanced capitalist countries adapt to the increasing pressures of liberalisation and globalisation (Howell & Givan 2011). The diversity of European welfare capitalism literature claims that different political-economic models lead to different yet rather stable outcomes despite facing input convergence (Esping-Andersen 1990, 1996; Hay 2004). The struggle over capitalist development within nation states historically resulted in a reassertion of social control over markets; this occurred through institutionalized national class compromises and the growth of the European welfare states, leading to de-commodification of labour (Esping-Andersen 1990). Conservative/corporatist welfare states, such as Germany featured a high degree of de-commodification, with strong trade unions, and a social insurance model based on the contributions previously made. Social-democratic regimes like Denmark achieved even higher degrees of de-commodification based on universalistic social policies. Whether to include a distinctive Nordic model in welfare state typologies has been discussed since Esping-Andersen's classic work on the three worlds of welfare capitalism. But the findings here support the argument that the Nordic models are different especially compared with the German development, with the institutional power of the unions having a paramount impact.

Another strand of literature emphasises the institutional transformation and the commonalities of convergence pressure stemming from a growing pressure for liberalisation of labour markets, industrial relations and social policies (Baccaro & Howell 2011; Eichhorst 2014; Glyn 2006; Streeck 2009). The liberalisation pressure stems from structural, ideological and political sources. European countries face competitive pressures related to Eastern European accession, competition from low-wage countries and capital mobility. Moreover, changes in social policies, stemming from an ideological turn towards neo-liberal ideas, have a negative spill-over effect on the labour market and industrial relations (Eichhorst 2014). Following this the labour movement in Germany, for example, is under great strains. It has struggled to organize expanding sectors of the economy such as low-wage service sector workers or offshored and subcontract workers (Flecker 2009).

The slaughterhouse industry has adapted very differently to the increasing pressures in Denmark and Germany. According to the regime literature one could expect liberalisation to have different impacts in different institutional settings (Esping-Andersen 1990, 1996; Häusermann & Schwander 2012; Hay 2004) despite the input convergence of liberalisation pressures (Hay & Wincott, 2012). In the slaughterhouse case we observe two different outcomes; in Denmark a coordinated institutional response and in Germany a deterioration of wages and working conditions. This point to a "dual convergence or co-convergence" where institutions converge within different institutional clusters as opposed to overall convergence (Iversen & Pontusson 2000).

We argue further that the power resource theory can explain this variation and thus bridge the two approaches to liberalisation. Trade unions feature prominently in Esping-Andersen's regime theory (Esping-Andersen 1990; Esping-Andersen & Korpi 1984). The power resource theory sees employers as either antagonists or protagonist for social policies and hence labour market policies (Korpi 2006). But employers may consent on different types of regulation if they cannot achieve their true preferences (e.g. less regulation), in order to avoid more far reaching regulation (Korpi 2006). As opposed to the German experience, in Denmark employers consent on a highly regulated labour market with high wages and full collective bargaining coverage at the sectorial level. The MNC operating in both countries (Danish Crown and Tönnies) adjust their behaviour to the local institutional context as argued by Kristensen and Zeitlin (2005). This is in line with the Korpian argument that employers are forced to consenting on strong labour market regulations. Thus union power resources can be seen as the determinant variable in this nexus of liberalisation pressure and regime theory.

The Danish slaughterhouse union NNF has historically had a stronger position and stil plays a significant role in the sector. By contrast, while German unions also had an influential position, they equally played an ambiguous role in the development of labour market segmentation (Emmenegger *et al.* 2012: 310). Moreover, in the slaughterhouse case the German union has a very weak position. This confirms the importance of union power and how power resource theory can explain variation and bridge the gap between regime theory and liberalisation theory.

Empirical part: The European pig meat industry

The European pig meat industry is under great competitive pressure, which results in a strong focus on cost reductions, mainly wage cost reductions leading to centralization and ever larger companies across Europe (Grunert *et al.* 2010; Hamann 2010; Refslund 2012). Multiple developments lead to company centralization and cost reduction pressures ranging from: 1) growing international competition including from low-cost countries (Czommer 2008) 2) cost reduction pressure from dominant retailers like Lidl and Carrefour that gain growing market shares and thus a stronger bargaining power vis-à-vis the producers (Baud & Durand 2012; Grunert *et al.* 2010: 370–71; Strandskov 2011: 731) with a growing share of the products being sold as “private labels” by the large retailers 3) structural developments such as rising farm costs and commodity prices (EFFAT 2011) and 4) customer resistance to higher prices, as modern retail chains resist passing price increases on to consumers who are living in an ongoing recession and finally 5) a general emphasis on increasing profit or shareholder-value in multinational companies (Morgan 2014).

Overall, labour cost has a direct impact on competitiveness because it represent up to 82 % of the net added value (Mériaux 2011). Food processing and slaughterhouse work have traditionally utilised a large share of low-skilled labour in combination with a Tayloristic work organisation (Grelle & Knudsen 1995). This is still the case, despite very significant upgrades in technology in the Danish but also German production sites. Thus the slaughter and meat processing companies strategize around wage costs reductions.

German companies resort to external flexibilisation measures paired with the opening of the Eastern and Central European labour markets through European economic integration. Hyper mobile EU labour migrants were often employed in the European construction sector and often work under precarious employment conditions (Wagner 2014). However, temporary agency workers and posted workers are increasingly employed in the German meat industry working for wages between three to five Euros. In Denmark, the main meat producer Danish Crown has rather resorted to relocating especially the most labour intense production from Denmark to Germany, Poland and UK in order to reduce costs (Refslund 2012, 2014a).

But Danish Crown has also modernised and upgraded their Danish production sites, e.g. by investing in the world's most modern slaughterhouse in Horsens. Furthermore, compared to other industries, the food industry and the pig meat production is culturally embedded (Grunert *et al.* 2010: 410) and bound to the local pig production, which explains why the entire industry has not been offshored. There is also substantial structural difference within Europe on farm size and sizes of production sites, with the Danish farming sector being more centralised and modernised, than the German.

Methods

This article draws on interviews gathered in Germany and Denmark from April 2011 until October 2014 from meat industry case studies. Case study research is fundamental for providing examples and investigating the micro-foundations for larger scale phenomena like liberalisation and globalisation (Flyvbjerg 2006). The reasons we focus on these two country cases are several. First, Germany and Denmark have different industrial relations and labour market systems (Crouch 2012), so when comparing the same sector across these two different institutional settings we can test various theories about institutional change and power resources. Second, both are embedded in the global meat industry and the EU Single Market with a significant meat industry size. Thirdly there are firms operating in both countries. We compare how different institutional frameworks mediate the competitive pressures of the international meat industry. In particular we are interested in identifying how firms and trade unions react to similar trends in the meat industry, and how the power resources affect this. We conducted interviews with trade unionists, workers, company management, employers' organisations, works councillors and policy makers at the industry, national and European level. In Germany a total of 50 and in Denmark 11 interviews were conducted. The interviews were semi-structured and focused on the development of the wage and employment structure, business strategy and the changing competitive environment, personnel and employment practices, work organization, and a range of job quality characteristics. The authors translated the quotes from the respective language into English. We triangulated the interview data with press reports, union reports and secondary literature when available.

Country case studies

Germany

Germany is the number one pig meat producer in Europe with over 58 million slaughtered pigs annually. Most of slaughterhouses in Germany are small or medium sized. However, the smaller companies played a minor role with regards to the overall amount of slaughtered animals. In 2012 55% of the commercial value of the slaughtering process was allotted to the four biggest slaughtering houses – Danish Crown, Tönnies, Vion and Westfleisch. In 2012 approximately 28,000 people were employed subject to German social insurance contribution in the slaughtering industry. However, the high fluctuation of employees and the widespread use of labour migrants complicate the exact precision of employee numbers.

Germany is about to introduce a statutory minimum wage. Moreover, the German meat industry has negotiated a sectorial minimum wage. However, the absence of the statutory and sectorial minimum wage as well as the lack of collective bargaining in the meat industry, together with declining union power and membership over the last decade has long been the weak link in the German institutional system. The lack thereof increased the attractiveness to insource lower wage labour via subcontracting companies.

The low labour costs have been a major driver for the German slaughter industry to grow quickly over the last 10 years. The cost advantage in Germany allows slaughterhouses to compete at two points in the chain. First, the lower cost of labour allows German plants to pay more for live animals, which is attractive to the domestic farmer supply base, as well as live imports. The advantages in Germany are so strong that the processors are attracting slaughter animals from neighbouring countries notably Denmark and the Netherlands but also further afield. Second, the lower processing cost also allows German plants to compete for retail and food service customers, by offering lower prices to these customers. The low labour costs are a markedly driver which makes German plants highly competitive against their neighbours. The impact has tempted some competitors to move some activity to Germany to take advantage of the employment system and the low wage migrants to capture a share of this saving.

The importance of subcontracting and worker posting in the German meat industry

Due to the absence of the minimum wage employment conditions and wage levels of the meat slaughtering and meat-packaging workers referred to their home country. This created work spaces in which actual ‘home country’ conditions applied to the posted workforce. The wages are calculated according to the nationality of where the firm is based creating “regime competition” (Streeck 1992) between workers. For example, a Polish based company can legally offer to send its employees to Germany to process a certain amount of meat in a certain amount of time at a German slaughterhouse. Its employees perform their work in the German company, but their wage, and employment rights refer back to the sending country standards.

Since the Eastern enlargement of the European Union (EU) in May 2004 the large German slaughterhouses have scaled down the core workforce to a minimum (NGG 2013). The majority of the meat slaughtering and processing in Germany was (still is at the time of writing) done by posted and temporary workers from Eastern Europe working for an hourly wage of about three to five Euros. Registration requirements do not exist for posted workers. A recent NGG works council survey indicates that in some meat processing firms posted workers make up 50-90 % of the factory workers (NGG 2012). Of the 30.000 workers in the slaughtering industry every third is employed under a subcontracting contract (NGG 2013). The use of subcontracting arrangements as such is highly contentious in the meat industry. Subcontracting arrangements require a service to be fulfilled. In the meat industry this service is often formulated as "the smooth sequence at the conveyor belt" (Interview SR1 2012) indicating the precarious use of these contracts in order to cut labour costs. Service contracts are attractive because a sectorial minimum wage was absent.

The low production costs in Germany have become widely known abroad. International meat companies are moving their production to Germany in order to escape the tighter regulatory frameworks of their home countries. For example, the Danish multinational company Danish Crown relocated thousands of workplaces from Denmark to Germany. The main reason as expressed by a Danish Crown manager was the regulatory context in Germany which allows employing posted worker from lower-wage countries:

"*If the German legislator says that this is in line with the law and we are allowed to do that, then we will do that. Only if they force us to change our strategy, then we have to adjust. What we do is legal and allowed*"

(Danish Crown manager, interview, 2012)

This development resulted in loss of members[1] and political/organisational strength of the meat sector union NGG (*Gewerkschaft Nahrung Genuss Gaststätten*) as more jobs are subcontracted to firms with non-unionized employees. Interaction between posted workers and the union does take

[1] As of December 2012 membership amounted to approximately 206,000 see NGG (2013).

place in certain cases but the NGG has not developed a particular organising strategy that targets workers that tend to be less organised, such as posted workers (NGG interview, 2013). In particular, the high labour turnover, language barriers and limited union resources inhibits the development of solidaristic relations between the union and posted workers as well as between works councils and posted workers (Wagner & Lillie 2014).

In the German context voice is provided through the ‘dual system’ of firm-centred works councils in the workplace, and trade unions in industry-level collective bargaining (Müller Jentsch 1995). Works councils are very much focused around the firm and have no rights to engage with posted workers. In a highly subcontracted industry, with the intra-firm hierarchies this implies, works councils are ill-suited to organising solidarity at the site level unless they would be granted rights to engage with posted workers.

The transnational workspace can be described as a highly flexible labour market, with low levels of jobs security and pay, high levels of exploitation and a fluid composition of the workforce. Posted work and subcontracting arrangements are not in violation of legislation as such. However, they represent precarious forms of work, isolate the workers from collective channels of representation. Long subcontracting chains with ambiguous employment relations often overshadow illegal practices, discrimination and exploitation. Moreover, the living conditions are often substandard. In the factory they are not provided proper work clothes. Even though the work clothes adhere to the hygiene standards of the factory they do not protect the workers against the cold in the cooling chambers where the meat is cut and processed.

Industrial relations: Union responses and the introduction of the minimum wage

Organizing hyper-mobile workers proves to be an inherently challenging task. Posted workers oftentimes accept substandard employment due to experiences of unemployment in the home country or because of cross-country wage differentials and rarely seek the help of collective channels of representation (Greer *et al.* 2013). Moreover, worker mobility and language barriers inhibit initial or continuous communication between union staff. So far host unions have seemingly been mainly ineffective at including EU posted migrants into collective channels of representation. The main response from the NGG to the increasing use of subcontract workers was the lobbying for a minimum wage agreement.

A particular feature of the German Posting Law is its limitation to certain sectors. It does not encompass the whole national economy. Sectors have to be included individually in the law. The meat industry is the latest addition to the Posting Law. It was not until 2014 before the social partners in the meat industry were able to negotiate a minimum wage agreement. While the trade union NGG requested sectorial minimum wage negotiations it did not have a negotiating partner because the big slaughterhouses were not members of the employers association ANG (*Arbeitgebervereinigung Nahrung Genuss*). A couple of key events impacted on this situation.

First, national public pressure was rising due to daily media reports on exploitative practices and precarious working situations within the big slaughterhouses. Second, international political pressure was increasing as the Belgium government filed an official complaint to the European Commission against social dumping in German slaughterhouses. According to the ANG's chief executive the industry has had a great interest in restoring its image. The four large slaughterhouses, Vion, Westfleisch, Tönnies and Danish Crown became members of the ANG which is now representing all slaughterhouses for pig meat, cow meat, poultry and meat processing plants such as sausage factories. Ironically even the BDA, which staunchly opposed the introduction of a collectively binding lowest wage bracket in the construction sector in 1996 - now supported the introduction of slaughtering-minimum wage. Their support had tactical reasons. In the midst of a public discussion about the introduction of a minimum wage the employers' side wanted to send a signal to the newly formed government that the state does not have to interfere in wage setting.

After a change in government, the German national minimum wage of 8.50 € was agreed in December 2013. It is set to take effect in January 2015 and includes a transitional period until it is mandatory for all employees. In January 2014 the social partners in the meat industry agreed on a sectorial minimum wage starting at 7.75 € with a regular rise up to 8.75€ until December 2016. The sectorial minimum wage was declared as generally binding through the German Posting Law. However, the establishment of the minimum wage is unlikely to reverse the trend to hire subcontractors as trade unions, government representatives and employers' organizations agree, because it has become an institutionalized part of the meat industry. However, it will improve the legal terms and conditions for posted workers.

Denmark

Denmark was, despite its small size, for several years the world's largest exporter of pig meat. Agriculture and in particular the pig meat industry still have a very significant role in Danish economy. The agricultural cluster accounts for nearly a quarter of overall goods exports and 15% of overall exports, and pig meat accounts for more than 5 % of the goods export (LF 2014). In 2013 the number of pigs slaughtered was 19 million (5th most in Europe), which is down from a high of 22.6 million slaughtered in 2004 (LF 2014). A significant problem for the Danish industry, which is contributing significantly to the declining number of pigs slaughtered, is the growing export of live pigs to Germany, where they then are breed and slaughtered. In 2013 almost 10 million live pigs were exported and this seems to be growing in 2014 as well.

The Danish slaughterhouse industry has in the last decades seen a dramatic centralization with accompanying gains in productivity since the newer and larger plants are more efficient. Danish Crown alone has closed around 30 production sites in Denmark over the last decade and only few large production sites remain. The sector is dominated by Danish Crown who account for roughly 80% of all pig slaughtering and two minor actors with 10% respectively 8% of the market; the smaller Danish MNC Tican in Northern Jutland and the German MNC Tönnies with production in Southern Jutland. The remaining production sites are very modern and have large capacities as Danish Crown's plant in Horsens; the world's second largest slaughterhouse with a capacity of 100.000/pigs/week and said to be the most modern slaughterhouse in the world.

The Danish slaughterhouse industry has traditionally been organised as farmers' cooperatives. Danish Crown and Tican are still cooperatives, but they are increasingly operating like multi-national companies (Refslund 2012). Danish Crown is Europe's largest pig slaughtering company and had in 2013 a global turnover of 7.1 billion Euro and 23.000 employees worldwide. Industry employment in Denmark has been reduced from 14.000 in the early 00's to 7000 in 2013 (LF 2014), with the majority of the reduction in Danish Crown. But the majority of the job losses have been due to centralization, declining number of slaughters and efficiency gains and not offshoring (Refslund 2012, 2013). Wages and labour costs are very high compared with German wages especially for subcontracted workers. The hourly wage level is around 25-26 euro[2] without pensions etc. so labour costs are even higher.

Centralisation, big-scale production and modern production facilities combined with a strong global brand gives Danish producers a strong competition position, but the competiveness of the Danish industry is under increasing pressure especially cost competitive pressures.

Offshoring Danish jobs

Since 2003 Danish Crown has offshored between 2.000 and 2.400 Danish jobs mainly to Germany, but also Poland and UK (Refslund 2014a). Some of this has been within Danish Crown subsidiaries, mainly Tulip. Most recently did Danish Crown decide to close a factory in Faaborg in Denmark by 2016 and move roughly 400 jobs to Cornwall in Southern England (Refslund 2014a). The offshored jobs have mainly been labour intense work processes like deboning and cutting and the main motive has been cost reductions. Labour costs are much lower in these three countries, so the destinations have also been influenced by Danish Crown production structure and existing capacity. Despite large public attention the job losses due to offshoring are less significant than job losses following general productivity gains mainly from centralisation and improved technology like automation. The declining numbers of pigs slaughtered also contributed to the job reduction. Overall offshoring accounts by best estimates for some 2.400 jobs of the more than 7.000 jobs lost since the turn of the millennium (Refslund 2014a).

The workers and their union oppose the offshoring of slaughterhouse jobs. However, if confronted by a choice between lower wages or job loss, despite some local incitements for accepting lower wages over jobs, the

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[2] Information from NNF and DI.

slaughterhouse workers have chosen job losses (Refslund 2012, 2013). The high flexibility and comparatively low levels of unemployment in the Danish labour market most likely affects this position. The labour market outcome of offshoring depends on labour market institutions especially re-training and allocation of workers from declining industries to expanding ones (Milberg & Winkler 2010).

Danish Crown's emphasis on cost reduction also means that new production, which could otherwise been located in Denmark, is placed abroad. The job effect of this is however almost impossible to measure, but the placement of new production obviously is important for job creation in the national economy.

While offshoring was mainly driven by cost reductions motives, offshoring was also used to curb the power of the slaughterhouse workers' union (NNF) and to discipline the workers (Refslund 2012, 2013). Danish Crown's CEO Kjeld Johannesen said in 2012 to a Danish newspaper;

" [we established our production in Germany] *to get more peacefully production conditions in a slaughterhouse in Esbjerg where the workers very often went on strike. Back then our workers were known to strike often. That attitude is fortunately completely gone...*".

The threat of relocating has been actively applied by Danish Crown management in several wage disputes and industrial conflicts. Danish Crown did on several occasions close production in Denmark and offshored the jobs since they were not able to achieve any labour costs reductions.

Industrial relations: Continuous wages struggles in the Danish slaughterhouses

Danish slaughterhouse workers were historically known for their labour militancy and slaughterhouse work was the text-book example of Tayloristic work with very high levels of work injuries (Refslund 2012, 2013) and a very strong worker collective (Lysgaard 1961). The industry structure meant that slaughterhouse workers historically were in a very strong strike position. When the pigs were not slaughtered the farmers would end up with the problems. The farmers (that historically also were the owners) would often have to give in because of company structure (with competing cooperatives), delivery pressure from customers and the reluctance of workers in other slaughterhouses to touch strike-associated work. Workers at other sites would simply reject slaughtering pigs from a slaughterhouse with an on-going strike and typically truck drivers would in secondary industrial action reject to transport the pigs in the first place (Refslund 2013). This setting combined with a unionisation rate of 100 % meant that companies often gave in for the worker's claims, which resulted in comparatively high industry wages.

But this has changed since the turn of the millennium. A high-ranked NNF union worker and chief negotiator states: "*Previously it was us [the union representatives] that had a lot to say, but now it is the company that have a lot to say*." (cited from Refslund 2013). These changes are influenced by increasing internationalisation where the companies more easily can relocate production. Wild cat strikes have basically been eliminated in the Danish slaughterhouses from a previously very high level since 2003 when the first jobs were offshored (Refslund 2012).

However NNF and the workers still have a strong position and unionisation rates remain at 100 % in all Danish Crown's sites (except a small processing site with a few unorganized workers) and the collective bargaining remains at sectorial level, not at plant level. Over the last decade Danish Crown has attempted several times to reduce the slaughterhouse workers wage level. Some of this struggle has been part of the formal collective wage bargaining, while other have been local and sometimes included the threat of relocation. Since the wages is regulated through sectorial collective agreements is it very difficult to make local agreement with lower wages. While there have been examples of local workers being ready to accept lower wages, national pressure meant that local wage reductions were ultimately rejected. The other slaughterhouse workers did obviously fear a round of concession bargaining if wages were lowered at one site. NNF also claimed a local wage agreement would be violating the collective agreement.

Most recently did Danish Crown state that they needed to reduce wage costs in the slaughterhouse on the small Baltic Sea island Bornholm otherwise they would close the plant, which they claimed was not profitable. It can be very difficult for workers and the union to find out whether this is actually the case or not (Morgan 2014:192). The workers rejected any wage reductions and in the end a broad agreement without wage reductions was made. The general agreement made included the national government and the local municipality supporting the production to safeguard jobs. The plant is very significance in the local labour market, due to the isolated geographical position, so the case had a lot of political attention, but the slaughterhouse workers and NNF had a firm stand against any wage reductions. Previously local conflicts have had the same outcome with jobs being relocated to Germany e.g. from Ringsted in 2004 (Refslund 2013).

Slaughterhouse wages are, as opposed to the majority of the labour market, still set through sectorial negotiations (*normalløn*) this type of negotiation covers approximately 15 % of the collective bargaining, while there are more extended local negotiations (*minimalløn*) in the remaining 85 %. Thus slaughterhouse workers have a stronger wage negotiation position than many other sectors. But both employers and workers have an interest in keeping the bargaining at the sectorial level. Danish Crown would probably gain in some sites with local wage setting, but e.g. in Horsens the more than 1000 workers would have a strong negotiation position threating with closing-down production in an industrial action. Despite several attempts the Danish slaughterhouse employers have not had any success in lowering wage levels, but wage growth has been slowed down compared with earlier.

The recent development in the Danish slaughterhouse sector

The industry has since the turn of the millennium seen a very sharp decline in employment after years of increasing employment due to increasing production. Yet, there have not been any significant reductions in wages and working conditions so far. When faced with the trade-off between wage reductions or job loss the workers have so far rejected any wage reductions, which has meant significant job losses through offshoring (Refslund 2012, 2013), but the majority of the job loss in the sector is explained by productivity gains and declining slaughtering. Although NNF have been weakened the workers position remain very strong. While posted and subcontracted – mainly migrant workers – are central in the German development, migrant workers and subcontracted workers do not play any significant role in Denmark. Migrant workers are employed under the same conditions as their Danish colleagues and they are union members as well.

Around one third of the workers in Danish Crown's site in Horsens are Eastern Europeans mainly from Poland.

Explaining the Patterns

The central question we have sought to answer in our analysis is how workers' collective representation and industrial relations in two different institutional settings influenced management practices aimed at increasing competitiveness. The findings show that local institutional setting was highly salient. In Danish slaughter-houses there is as of yet no dualisation tendency because of the all-encompassing industrial relations system. By contrast, the German case shows wide-spread dualisation with mainly EU labour migrants constituting the lower tier of the labour market with very low wages and precarious working conditions. The findings point to several institutional characteristics that explain this development: 1) union strength is an integral variable to explain diverging paths; 2) which in combination with declining bargaining coverage gave employers "exit options" in the German context; 3) labour power is also preconditioned on the structural conditions of the employers' side.

Firstly, in line with the Korpian argument (Korpi 1983, 1978) we find the main explanation of the sectorial differences between the two countries is the unions' power resources, reflected in union membership but also in institutional strength in industrial relations and labour market regulation, which is embedded in the national model (Esping-Andersen 1990; Esping-Andersen & Korpi 1984). Nevertheless, unions' membership rates also reflect power resources. Historically all Danish slaughterhouse workers are union members and the unionisation rate remains 100 % today (Refslund 2013). By contrast, the comparative rate for NGG in Germany has been much lower around 30 % (Czommer 2008: 172).

Moreover, the institutional embeddedness of Danish unions as an integral part of the Danish industrial relations system adds to explaining cross-country differences. The German sector faces much precarious employment mainly through subcontracting of labour migrants. Menz (2005) found in an intra-European labour mobility study that organized labour strength was an important determinant in reducing downward wage pressure stemming from labour migration. The dual labour market outcome in Germany is conditioned on the weakness of the German slaughterhouse unions rather than explicit choices to not include or to exclude migrant workers. In Denmark the share of migrant workers mainly Poles and other Eastern Europeans is growing, but in the slaughterhouse industry they have been fully integrated into the industrial relation system including the union. This is fostered by the strong workers collective culture in Danish slaughterhouses that can exercise large social pressures on unorganised workers as well as the industry structure with large sites, which makes union recruitment easier.

While the Nordic unions remain relative strong they also have a somewhat pragmatic and consensual approach to labour market outcomes (Andersen *et al.* 2014; Gustavsen 2007). The slaughterhouse workers' union has in recent years embarked on a more consensual road partly voluntary, partly coerced through the sectorial development (Refslund 2012, 2013). Danish unions typically engage in productivity enhancing dialogue with management and can thus have a positive impact on productivity (Kristensen & Rocha 2012).

Secondly, while the European trend is towards declining importance of sectorial or national coordinated bargaining on behalf of more company bargaining (Marginson 2014), the Danish slaughterhouse workers have managed to maintain sectorial wage bargaining and thus avoided any concession bargaining. Much wage bargaining in the Nordic countries is still multi-employer bargaining and rather coordinated (Vartiainen 2011). Any multi-employer wage bargaining has completely been eroded in the German slaughterhouse industry over the last two decades, and there is today still no multi-employer bargaining beyond the political negotiations of a minimum wage and the sector negotiation between the big four companies.

Thirdly, the realistic probability of wage coordination is not only contingent on workers organisation, but also employers' organisation (Martin & Swank 2012). Historically employer organisations has been lacking in the German meat industry (Czommer 2008: 158), while it has been an integrated part of the Danish industrial relations system since the end of the 19th century when labour market regulation was settled in *September-forliget* (the September agreement), which has almost constitutional status in the Danish labour market system. Moreover, while the findings in the case studies shows institutional and socio-economic settings are the main explanatory variable, structural conditions also influences the outcome. The more modernized and centralized industry in Denmark has an impact on how firms try to adjust their costs. The larger Danish slaughterhouses can easier automatize part of the production, while often the small and medium size companies in Germany cannot affords this, so they choose the low-road with low wages and subcontracted labour migrants (Czommer 2008; Grunert *et al.* 2010: 386–87). The German meat industry is also much more segmented than the Danish industries with around 1.300 companies in 2008, which makes the coordination of the labour market even more difficult (Czommer 2008).

Institutional change in the slaughterhouse industry and beyond

The German labour market has seen significant changes in last decade with increases in low-wage work (Eichhorst 2014; Holst 2014; Carlin *et al.* 2015). The 'German model' still covers a significant proportion of workers. However, a complex labour market of low-wage workers outside that system has grown (Bosch & Weinkopf 2008; Thelen 2009: 484). The so-called Hartz reform package, together with the controversial Agenda 2010, paved the way for a paradigm shift in the German labour market and social policies. Among other re-regulatory measures, Minijobs were expanded, atypical employment was liberalized, the age threshold for the application of repeated fixed-term contracts was lowered, start-up ('Me Inc.') subsidies were expanded and the master craftsman's diploma as required in many crafts was abolished (Eichhorst & Kaiser 2006).

As a consequence unions and collective bargaining institutions have become less encompassing. Instead of decommodifying labour, collective agreements are now used to bring competition within the company's workforce, creating a 'core' and a 'peripheral' workforce (Holst 2014). Dual labour markets can be seen as an attempt to continue to access the collective goods provided by the organised economy, while creating less organised workspaces walled off from the organised economy in various ways. This general development with weakening union power and deteriorating working conditions are reflected in the findings from the slaughterhouse industry. Posted work in the meat industry is likely to produce labour market segmentation similar to vertical disintegration. Rather than being fundamentally different, these processes are both part of and signal the variegated nature of regulatory configurations in European political economies (Brenner *et al.* 2010). Changes in the labour market and industrial relations can spread into other areas like social policy and labour market policy. In the German case dualisation tendencies to a large extent started in the labour market and industrial relations and then spread to other areas (Thelen & Palier 2012; Carlin *et al.* 2015). While posted work, via EU subcontracting, is traditionally prevalent in the construction industry (Wagner & Lillie 2014), it is now dominant also in the meat industry supporting the general dualisation tendencies in the German labour market.

While the German model has seen significant changes the impact in Denmark has led to a recalibration rather than erosion of the model. Despite some negative perceptions of the future of the Nordic model and the power resources of unions and workers (see e.g. Sippola 2012), the case study show that there still might be substantial room to manoeuvre even in a more globalised economy. The Nordic model has previously adapted under serious strains e.g. during the economic crisis in the mid-80's and early 90's (Andersen *et al.* 2014). While studies in other economic sectors like agriculture, cleaning and construction point to increasing labour market dualisation mainly for labour migrants (Eldring *et al.* 2012; Refslund 2014b) the findings from the slaughterhouse industry point to the continued prevalence of the Danish industrial relations model at least in some industries.

Conclusion

In this article we approached the question of how globalisation affects labour markets and welfare states through the lens of the pig meat industry in Denmark and Germany. Findings show how globalisation pressures lead to cross-country variation in a sector that previously shared many sectorial characteristics. While both case settings had to adapt to increasing pressures, they apply different strategies resulting in variegated outcomes. The institutional settings affect the firm strategies differently. This does only seem to further reinforce the divergences of European welfare states.

The case study shows vast differences in outcome in the sector in Germany and Denmark. The slaughterhouse industry in Denmark still have good working conditions and wages in combination, while the German case have deteriorating wages and working conditions especially for subcontracted migrant workers. This difference is mainly explained by the unions' power position in the industry in line with previous arguments made in the power resource theory (Esping-Andersen & Korpi 1984; Korpi 1983; Stephens 1979). In this tradition power is not only understood as high membership rates, but as institutional strength that is embedded in the national system e.g. leading to multi-employer wage bargaining. The power resource theory have not been very dominant in the recent years political-economic analyses of institutional change, but the findings in this article supports the argument that political-economic analyses should be more attentive to power resources in labour markets and welfare states (cf. Pierson 2011) than is the case today.

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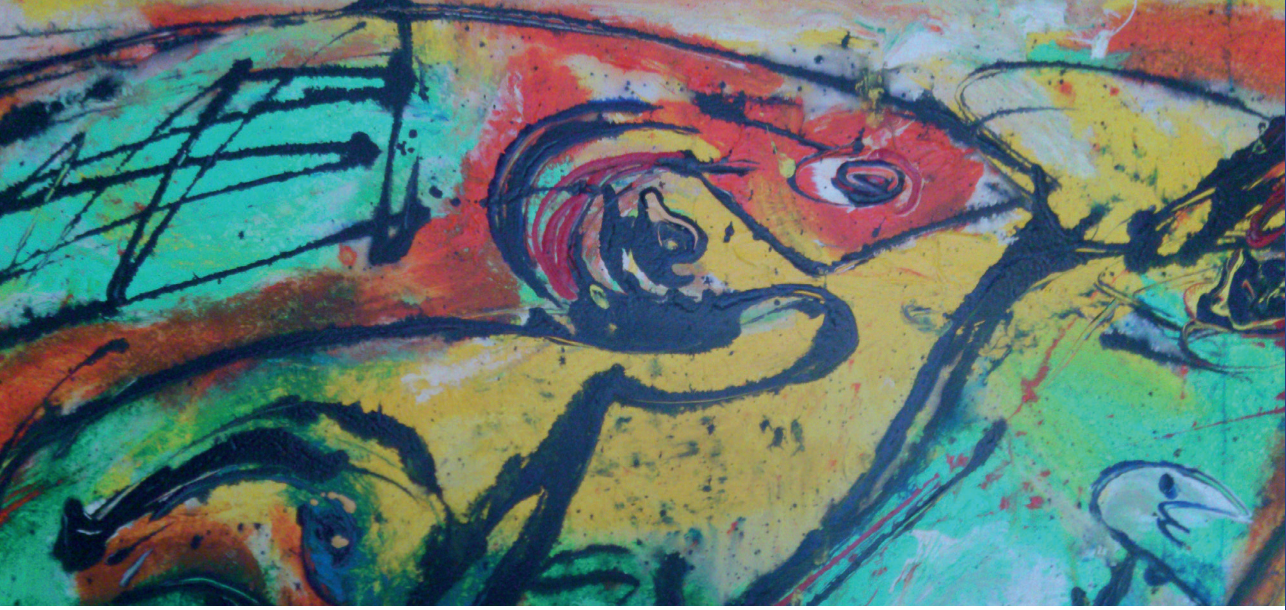

RESUMÉ

Det danske arbejdsmarked bliver i stigende grad påvirket af den internationale økonomiske integration. Globaliseringen øger arbejdsgivernes fleksibilitet og øger samtidig konkurrencepresset, hvilket påvirker magtbalancen, som historisk er meget central for det danske arbejdsmarkeds organisering. Globaliseringseffekten på arbejdsmarkedet er typisk indirekte gennem mekanismer som kapitalmobilitet, stigende konkurrence og arbejdsmigration. Derudover fungerer nationale forhold og institutioner medierende, så resultatet af globaliseringspresset er afhængigt af den institutionelle setting. Afhandlingen belyser globaliseringseffekten primært på arbejdsmarkedet, hvor stigende internationale konkurrence samt stigende mobilitet og fleksibilitet for virksomhederne i høj grad påvirker arbejdsmarkedet og samtidig forstærkes af et generelt pres for at liberalisere arbejdsmarkeder. Sammen med udfordringen fra en stigende arbejdsmigration, skaber dette et forandringspres på den danske arbejdsmarkedsmodel. Samtidig viser afhandlingen, at en stærk arbejdsmarkedsorganisering kan afbøde noget af presset, selvom den danske arbejdsmarkedsmodel oplever et stigende pres.

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