Procesos de globalización de las cadenas de valor en la industria de vestuario en Portugal: implicación en las estructuras de trabajo

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Resumen:

Algunos de los fenómenos donde el concepto de "globalización" es aplicado incluyen la internacionalización de los mercados, la globalización de la cultura, el dominio político hegemónico del mundo por algunos estados poderosos, o grupos de estados, el poder creciente de organismos supra-nacionales, y el desarrollo de una división global de trabajo.

De acuerdo con Radice, la globalización é generalmente definida como "un proceso a través de lo cual una proporción creciente de transacciones económicas, sociales e culturales ocurre directamente o indirectamente entre partners de países distintos" (Radice, 2004: 154).

Un ponto de partida para entender la división global del trabajo debe ser la investigación de los modos como las empresas se reestructuran, una vez que son los actores-llave en la decisión sobre que trabajo debe ser encontrado y donde.

Las "cadenas de valor" descriven cada etapa en el proceso productivo de un producto o un servicio final. La palabra "valor" en la frase "cadena de valor" dice respecto al valor añadido. Cada etapa en la cadena de valor implica recibir inputs, procesarlos, y entonces pasarlos a la unidad siguiente en la cadena, con el valor que está sendo adicionado no proceso. As unidades separadas da cadena de valor pueden estar dentro da misma empresa (in-house) o en distintas empresas (outsourced). Similarmente pueden estar en un mismo local, o en otra localización. La normalización de muchos procesos del negocio, combinada con la digitalización da información y el desarrollo de redes de telecomunicaciones de elevada capacidad ha tornado posible el trabajo tele-mediado, pudiendo este ser externalizado y/o re-localizado, conduciendo à introducción de una división de trabajo internacional no trabajo de procesamiento de información.

Esta comunicación presentará algunos resultados derivados do proyecto europeo WORKS, donde son estudiados casos portugueses de empresas que justamente se integran en cadenas de valor globalizadas, sendo analizadas en detalle implicaciones en los modelos de organización del trabajo y de las (nuevas) estructuras profesionales.

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implicación en las estructuras de trabajo

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Structure

1. Introduction
2. Concept of globalisation and value chain restructuring
3. Clothing and textile industry in Europe and Portugal
4. Cases studies in Portugal
5. Conclusions

1. Introduction

The paper examines changes in work in the context of the globalisation process. In a global economy, value chains are becoming more global, more fragmented and longer. Therefore the dynamics of a global change of work can only be understood in the context of restructuring of value chains. The paper will present results from case studies conducted in Portugal for the European research project WORKS (Work Organisation and Restructuring in the Knowledge Society). Aim of the case studies was to examine changes in work organisation and work structures from the perspective of value chain restructuring. Also changes in the use of knowledge and skills as well as demands on flexibility were central issues. The Portuguese case studies focus on the clothing and textile industry, which will be presented as an example for a transforming industry in a global economy.

2. Globalisation and the value chains restructuring

The decision by a company to open up a branch in another country may be driven by several reasons, or one reason may be embedded in another, or follow consequentially from another. This is actually also happening in all the industries of the Portuguese economy, and specifically in the clothing industry. For instance a company may decide to buy up a subsidiary company in a developing country (Eastern Europe, Asia, Northern Africa or Latin America) to invest some of its surplus. But in the process it may also gain access to new markets or to cheap sources of labour. Despite the difficulties of disentangling and understand these motives, it is useful to bear such distinctions in mind if one wishes to develop an analysis of the dynamics of the global restructuring of work.

According to some authors, globalisation is most commonly defined as “a process through which an increasing proportion of economic, social and cultural transactions take place directly or indirectly between partners in different countries” (Radice, 2004: 154). However, as Radice points out, this approach suggests that it is synonymous with 'internationalisation' and assumes a pre-existing landscape of autonomous nation-states, ignoring the long history of economic, social and cultural interpenetration of states under various forms of imperialism and colonialism and the extreme inequalities of power been states that resulted from this.

The development of a global division of labour is not new. The 20th Century saw a growth in multinational corporations operating increasingly independently of the interests of the nation states in which they were based. Since the 1970s a 'new global division of labour' was coming into being in manufacturing industry with companies breaking down their production processes into separate sub-processes and redistributing these activities around the globe to wherever the conditions were most favourable (Froebel, Heinrichs & Krey, 1977).

The last decades saw a continuing growth in this development, with industries as diverse as clothing, electronics and auto manufacture dispersing their production facilities away from developed economies with high labour costs and strong environmental controls to developing countries, often in 'free trade zones' where various tax incentives were offered and labour and environmental protection regulations suspended in an effort to attract as much foreign direct investment as possible.

The globalisation of markets, the globalisation of production, the globalisation of capital flows as well as a new role of knowledge involve the restructuring of companies, the restructuring of global value chains (or supply chains) and of course changes in work organisation. The global economy and the increasing competition force companies to restructure. They are responsible for the decision whether to relocate production capacities abroad or whether to outsource or subcontract production and services. These activities may lead to both spatial concentration of functions and spatial decentralisation of functions in smaller units. As a result of both macro-economic transformation and restructuring processes in industry, the global value chains are getting longer, more complex and more fragmented. Moreover, there is an increasing requirement for different intermediaries, which play a variety of roles including supply chain co-ordination, logistic management, recruitment, negotiating, site-finding or training (Huws/Ramioul, 2006: 23). What is meant with the phrase 'value chain'? Huws and Ramioul propose the following definition (Huws/Ramioul, 2006: 19): "The value chain is a phrase used to describe each step in the process required to produce a final product or service. The word 'value' in the phrase 'value chain' refers to added value. Each step in the value chain involves receiving inputs, processing them, and then passing them to the next unit in the chain, with value being added in the process. Separate units of the value chain may be within the same company (in-house) or in different ones (outsourced)".

Restructuring in companies and restructuring of global value chains have impacts on the organisation of work. The knowledge society requires creative knowledge workers as well as workers for routine jobs and repetitive work. There is a new split between 'head' and 'hand' and between 'upskilling' and 'downskilling' (Huws/Ramioul 2006: 26). The most important change in work organisation is flexibility. Most of the workers in the knowledge society have to deal with an increasing flexibility in terms of working time, volume of work, working contracts, skill content and tasks. Increased flexibility and new forms of work organisation may lead to dissolution of the boundaries between work and private life (work-life-balance). Moreover, a growing number of people are confronted with emerging multidimensional forms of insecurity and precarity, such as income insecurity, employment insecurity, lack of union representation and precarious employment (Flecker et al. 2006: 45-57).

5. Clothing and textile industry in Europe and Portugal

The clothing and textile industry can be described as a manufacturing industry under deep transformation. According to a working paper of the European Commission the clothing and textile sector can be defined as follows (European Commission, 2003a: 9): "The 'textile and clothing (T/C) sector' is a diverse and heterogeneous industry, which covers a very wide variety of products from hi-tech synthetic yarns to wool fabrics, from cotton bed linen to industrial filters or from nappies to 'haute couture'. This diversity in end products corresponds to a multitude of industrial processes, enterprises or market structures".

Value chains in clothing and textile industry are quite fragmented. The value chain involves several production segments (Audet, 2004: 10-11): (1) the preparation of natural fibres; (2) the manufacturing of textile products; (3) the manufacturing of clothing products (garment or apparel products); and (4) retailing activities. The value chain also involves the preparation of man-made fibres, design, marketing as well as distribution and transport. Within the clothing and textile value chain, intermediaries become more and more important. Intermediaries provide services in the fields of consultancy or R&D (e.g. design of collections, communication with customers, technical assistance, and strategic knowledge).

The clothing and textile industry is an important part of the European manufacturing industry. In 2002, the EU15 clothing and textile industry employed more than 2 million people in close to 177,000 enterprises. The southern countries are relatively more specialised, with their share of the clothing and textile value added in the total manufacturing value higher than the aggregate EU figure of 4 per cent. In contrast, the northern countries have started to diversify their clothing and textiles business more towards niche markets. In the New Member States, clothing and textiles have traditionally been a major sector of manufacturing industry (Commission of the European Communities, 2003a: 3-7). European clothing and textile industries have lost many jobs in recent years. In the EU15 there was a decline in employment levels of 31 per cent between 1990 and 1995, with a further fall of 15 percent between 1995 and 1998. All in all, the EU15 lost more than 1 million jobs in this period. In the last 20 or 25 years, European clothing and textile industries have outsourced many labour-intensive clothing production and semi-skilled jobs to neighbouring countries. While employment is falling, labour productivity has increased in the EU (European Foundation, 2003a: 3). But reduction of jobs in this industry is not only a phenomenon in European countries. The United States and China are losing textile jobs too. Employment is shrinking because of rapid advances in technology and labour productivity (Rivoli, 2005: 141-142).

In the last four decades, world clothing and textile trade increased by more than 60 times. In the year 2002 the EU was the world's biggest exporter of textile products and the second largest exporter of clothing products and one of the world's largest markets for clothing and textile products (Commission of the European Communities, 2003b: 2-6).

In terms of working conditions, the textile sector suffers from a negative image. In developing countries one can find the so-called "sweatshop", which is a synonym for working conditions that violate human rights. Moreover, part time work, fixed term contracts and temporary work arrangements are quite widespread in the clothing and textile industry (European Foundation 2003b: 2-4).

In particular, the phase-out of the Multi Fibre Agreement (MFA) at the end of 2004 is one of the major drivers affecting change in the clothing and textile. The MFA regulated international trade relations in the clothing and textile sector by means of import restrictions for clothing and textile products. The MFA played a crucial role in protecting producers in the EU and the US. Under the WTO Agreement on Textiles and Clothing (ATC) the MFA was scheduled for expiration. Foremost, the abolition of quotas will lead to higher levels of international competition as well as increasing production levels and decreasing production costs (European Foundation, 2003b: 4).

Also the process of the EU enlargement affects the European clothing and textile sector and will have impacts on employment and the restructuring of value chains. It can be concluded that trade liberalisation policies and the EU enlargement will lead to increasing competition, ongoing relocation of production capacities and new patterns of demand. Other driving factors of change are new technologies, such as Computer Aided Design (CAD) or Computer Aided Manufacturing (CAM), which found their way into the clothing and textile industry. Also the discussion of intellectual property rights (problem of counterfeit products) affects the development in the clothing and textile industry (European Foundation, 2003b: 4-6). The sketched trends and change processes in this industry show that the sector is currently at a crossroad.

How is the situation in Portugal? At present the Portuguese clothing and textile industry is facing a crisis with numerous bankruptcies, relocations, and large number of redundancies. The crisis results from problems in adapting to new market conditions, and the need to find alternatives to the present low-cost operations. Also the need to embrace innovation, creativity and co-operation influence the situation in the Portuguese clothing and textile sector (European Commission, 2003a).

Foremost the recent development in the Portuguese clothing sector is characterised by a reduction of jobs. For instance, unemployment in Vale do Ave and Beira, both centres of the textile and clothing industry in Portugal, increased in recent years. In particular, women are the victims, because the clothing sector is a sector with a high level of female employment. Another feature of the sector is a low level of education and skills (Cristovam, 2003).

Like other southern European countries, Portugal is more specialised in clothing production, while northern countries are much more textile-oriented. In recent years Portugal has invested a relatively high share of its value added in the clothing sector (for instance in the purchase of equipment). In general the value added of the sector remained quite stable in recent years. However, despite its dynamic investment strategy, Portugal retains at a low level of investment per person employed in the sector, because the Portuguese clothing industry is still dominated by labour intensive production. Labour productivity increased in the last years, but in comparison to other European countries the level of productivity is quite low in Portugal. Also the level of salaries is also quite low. It can be concluded that in comparison with other European countries, Portuguese companies have had fewer incentives to move from a labour intensive mode of production to productivity enhancing instruments. Because of that Portugal still derives an important part of its competitiveness from lower costs than from higher productivity. Consequently the Portuguese clothing and textile industry is more vulnerable to salary increases and to trade liberalisation policies (European Commission, 2003a).

5. Case studies in Portugal

The case of WW (design)

During the 1990s the company changed from a supplier of products to a service provider within the clothing and textile industry. To remain competitive the company added several extra services to its functions such as R&D, design, sampling service, consulting, and sourcing of materials. Due to this restructuring process at WW, the organisation of work as well as the the content of work changed. According to a statement of the general manager also the workload has increased dramatically in recent years. Before restructuring, WW was working with fewer collections per year and was not involved in the design process. The company was selling products, and now the company is selling services and “solutions”. Moreover, they are not working with any foreign production company. The company had all its production partners in Portugal.

The working conditions at WW changed due to the specific market development in the clothing and textile industry, which can be described with the following keywords: increased competition; need for speed and more product variety; and need to offer and produce at a low price level. *"There have been massive changes in the way we work"* (interview with general manager). For instance, WW often has to respond very quickly to changing trends in fashion and changing customers' requests. The staff members sometimes have to stay longer at the company premises, and can have to work more hours. Also they must have to cope with an increased workload and an increased responsibility. The employees also have the possibility to negotiate with customers and have to invest more time in crisis management. As a result, one can find that the pressure on the staff members is increasing. *"The pressure is of course much more than it was before. (…) We have to work with quick dates, and it is always a lot of pressure in our back. You can't relax in that department. Everything is very fast and if we have a problem we have to solve it very quickly. I never relax"* (interview with a designer).

WW sources production and takes care of the whole production process on behalf of their customers. This requires also an increased mobility of the staff members. For instance, the employees must have to travel sometimes to the factories of the partners for control of production and quality control. The need for travelling increased in recent years. And due to the increasing importance of production partners in Brazil or India also the travel distances increase.

As already mentioned companies within the clothing and textile value chains have to cope with the challenges of a changing market situation. This development has also consequences for the communication between the different units of the value chain (external communication) and the communication within the different units (internal communication). This implies for WW in the first instance a complete different way of communication is necessary:

(1) *Increased communication with customers.* WW has to increase the intensity of communication with their customers. The external communication with customers

becomes more and more important. *"It is very important to understand what the client wants. It happens quite often that the client comes to our office and we also go to the clients. There is a very close communication"* (interview with a designer).

(2) *Increased speed of communication.* In a global economy companies have to respond very fast to changing trends and changing customers' request and demands. The general manager of WW explained that the company sometimes has to react within one hour to customers' requests. To cope with this challenge, this studied company needs to organise communication in a different way. That means for example that it is necessary to have additional personnel capacities to communicate with the customers. The major instruments of communication are email, telephone, internet telephone (e.g. Skype), fax and the specific order tracking software.

Flexibility is essential to understand the growth of WW. Organisational flexibility is always present in the speech of management and workers. It is needed, according to them that factories keep up with market needs, and work 24 hours per day. *"Someday we may have to work 24h per day but we need the factories, we can work with client in that basis but not with factories, in summer for example, we have to close in August because all the factories in Portugal close, mentalities need to change"* (interview with a worker). As already mentioned the most important change within the clothing and textile sector is the need for speed and the necessity to respond very quickly to changing trends and customer requests. The employees of the studied company must be able to answer within 24 hours to customer demands and requests. That implies in general a more flexible working time model. For instance, overtime is necessary due to changing trends, customer demands and tight deadlines.

Generally WW's workers haven't got any problems with working conditions. But the workers mentioned that at certain points balancing private life and work is very difficult. For instance, work-life-balance is difficult when the employees have to visit fairs, factories of production partners or customers. Workers with family support referred that it is easier for them to travel because they can count on the support of their families.

The company has some of the typical problems of the companies of this sector in Portugal: lack of qualifications and low level of technical competencies among their workers. Nevertheless, they have stable jobs and a fair wage system that gives the company the possibility to face new challenges and to develop steps forward into innovations in the development of products in shorter lead times. One of the outcomes of this situation is the possibility for an increased flexibility of working time. According to that, workers of the company referred on problems balancing work and private life. And in fact, the company employed people that had to leave the company because they couldn't cope with the increasing pressure.

The change of WW to a service provider, which included the addition of new tasks (consultancy, design, R&D, sample development), leaded also to an extension of the staff due to extra functions becoming evident in the process. In its new role, the company is focussing more on the creative process (design) and R&D within the clothing and textile value chain. This can be seen as an indication that a kind of knowledge-based work becomes more important in the company. Also the importance of ICT-based communication is increasing in the company. This and the new role of communication lead to new skill and training demands in the fields of communication ,computer applications and languages.

The case of ShirtmakerPT

Before the need of restructuring ShirtmakerPT was a stable company with production only inside the company. The fact that the fabrics were done in another textile company, in the same area and that the storages were nearby, would make the process faster than other companies.

ShirtmakerPT went from the position of being contracted by the clients to produce, acquiring the position of contractor of production. This period of increasing production was characterised by an increased number of jobs, and changes in the model of working time. In 2002, due to the decreasing of the workflow (because of a less number of orders), ShirtmakerPT started reducing the number of workers, and relocating their manufacturing activities by the establishment of an unit of confection in Romania in cooperation with another Portuguese manufacturer. This implied the re-location of machines and the movement of a few human resources in the quality control area from Portugal to Romania. Not only the production and storage area suffered changes in the process of restructuring, but also in the technical and planning area there were changes. Some occupational categories vanished and the functions of those were added to other categories. There was a re-definition of some categories concerning the functions.

Nowadays ShirtmakerPT has a commercial function but controls directly all the production as before. What happens is that manufacturing starts in Portugal with the preparation of the garment (fabrics, components) and then goes to Romania, Honduras, Morocco and other areas of Portugal to be confectioned, after, it comes back to Portugal to be delivered to the client by ShirtmakerPT.

The re-definition of functions increased the workload and there wasn't a compensation for it. The beginning of restructuring (re-location and outsourcing) led to the closing of ShirtmakerPT manufacturing in-house and dismissing of workers. The work became individualised, but due to some difficulties of adaptation to some functions the workers became more close to each other. Te workers that were moved from ShirtmakerPT to Têxteis Vizela complain that teamwork decreased. Before they moved, in ShirtmakerPT, the confection manufacturing worked in partnerships and it was less monotonous, because workers had to change functions more often. Only after one year, the workers were evaluating positively their work, but mentioned that they felt that the workload increased due to this difficult adaptation.

Moreover, the case study shows how restructuring influences work organisation: working time, working conditions and work load. Workers were often confronted with dismisses, and if they remain in the company they were often confronted with new tasks and sometimes an increase in the workload. A lack of training is seen as a big problem because the workers are often also confronted with new demands in terms of skills and qualification.

5. Conclusions

Key to the development of this globalised strategy is the disaggregating of organisations into smaller functional units that may then be relocated spatially or outsourced. Spatial relocation may take the form of concentration of functions in large centres, often organised on Tayloristic principles, or of decentralisation to smaller units, which may exhibit more flexible forms of organisation (Flecker & Kirschenhofer, 2002). Outsourcing, too, may be to large multinational companies specialising in the provision of a range of back office functions, or to micro-businesses supplying a single business service (Huws, 2003).

The spread of information and communications technologies, together with a global convergence in standards which has eased interoperability, combined with the near-monopoly use of a relatively small number of software products and the growing dominance of English as the world business language, have created a situation where the standardisation of a very large range of business processes has become possible, and huge economies of scale can be achieved by companies which specialise in supplying them.

In the global market for business services a space has opened up in which the supply side, rather than the demand side can increasingly set the terms of trade. One may conclude that in order to gain an insight into the dynamics of the restructuring of global value chains it is essential to take account of the roles of intermediaries as important actors.

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