



Seminar

Universitat Autònoma de Barcelona, 11th February 2020

‘Digitalization and Industrial Relations’: a Comparative Case Study of Retail Sector Between Italy And Spain

Arianna Marcolin
a.marcolin@santannapisa.it

Supervisors
Professor David Natali
Professor Oscar Molina Romo

Table of contents

- Retail sector: an overview
- Research question
- Novelty & methodology
- Theoretical framework
- Analytical framework
- Digitalization
- Implication of digitalization
- Case selection
 - Italy
 - Spain
- Preliminary findings

Retail sector: an overview

- It has been affected by **various challenges**
 - *Deregulation*
 - *Globalization*
 - *Technological development*
- It is one of the **most remunerative** sector in Europe
 - Almost 11% of job and 15% of the EU's GDP, fifth of whole companies in Europe sell through internet
 - **Spill-over** effect on the whole economy
- The workforce is highly fragmented and low level of trade union membership

Research Question

- Which is the **effect** of **digitalization** on **industrial relations** in the **retail** sector?
 - Are the dimension and the impact different between Italy and Spain?

Developed in four main sub-questions:

- Which are the **actions** of **trade unions** and **business strategies** of **employers** in the retail sector in relation to the three dimensions of digitalization?
 - Does Italy differ from Spain?
- Which is the impact of the three aspects of digitalization on the retail sector **collective agreements** (national, company and territorial)?
 - Does Italy differ from Spain?
- To what extent **national institutions** matter in shaping the impact of digitalization on actors' strategies and collective bargaining outcomes?

Novelty of the Research & Methodology

- The **novelty** of the research is
 - To fill a **gap** in the **literature**
 - To provide **categories** of **trade unions actions & business strategies**
 - To **compare** two countries (**Italy and Spain**) **never** compared before regarding this issue
- **Methodology**
 - Semi-structured **interviews**
 - Inductive **content analysis**

Theoretical framework

- **Actor-based neo-institutionalism**
 - Focus on how **actors** utilize the **institutions** in which they are **embedded** for pursuing their **interests**
 - Actors agency
 - At the same time institutions provide **boundaries** (opportunities, chances, room of manoeuvre) to actors within which they have to operate

Analytical framework

Combination of the two framework

- **Varieties of Capitalism**
 - Comparison between Italy and Spain
- **Sector-based approach**
 - to understand if retail sector institutions react differently to the same change or whether national institutions do play a role in shaping social actors strategies and bargaining outcomes

Three dimensions of Digitalization in the Retail Sector

- From the **literature** and the **empirical research**, it is possible to highlight **three main common dimensions** that have strong implications on the occupational structure of the sector :
 - *Omni-channel*
 - *Touch-screens*
 - *Bracelets & Tablets*

Implications of Digitalization in the Retail Sector

- Working **hours**
 - *Time Porosity*
- Extensive employers **control**
- New **skills** required
- Different **nature** of job
- Decreasing **volume** of shops
- Increasing importance **logistic** part of the business
- **Organization** of work

Case selection: Italy and Spain (I)

- **Most Similar Case**
- The two countries are **Mixed Market Economy**, embedded in the Southern European model
 - Presence of **small and medium** firms
 - **Antagonistic trade union, fragmented** along **ideological** lines
 - **Stronger** role of the **State** as mediator
 - In both countries after the financial **crisis of 2008**
 - The **firm-based** and **territorial** level have grown in **importance**
 - Italy pirate agreements
 - Implementation of **austerity** policies
 - Wage devaluation
 - Erosion of working conditions
 - Reinforcement of a more authoritarian model of industrial relations

Case selection: Italy and Spain (II)

- Following **European Digital Agenda**
 - Piano Calenda/Industria 4.0
 - Digital Agenda for Spain / Industria Conectada 4.0
- Both countries increase percentage of people that buy online

But

- In Spain broader perspective of digitalization
 - Development of digitalized public sector services
 - Broader coverage of Internet provision
 - Increase number of people connected and buying online
- In Italy mainly focus on automotive sector
 - No digitalized public services
 - Not full coverage of internet

Italy

- The **economic conditions** have been **improving** in 2015–16
 - **Growth** of +1.5% (Istat, 2018)
 - **Increased** numbers of **workers** in the retail and service sector (+20,1%)
 - **E-commerce** has increased of 19% from 2015 to 2016, estimating in 2016 19.6 billion euros
 - **Not clear number** regarding companies **investments** on technology
- After the crisis **new wave of negotiation** at sector and company level
 - Due to the new labour market regulation regarding **productive premium**
- **Actors**
 - Ficalms Cgil, Fisascat Cisl, Uiltucs
 - Federdistribuzione, Confcommercio, Confesercenti

Spain

- During the austerity years virtual **paralysis of tripartite social dialogue** in Spain
- Now slight attempt to recover it, through the “**open governance**” widely promoted by the European institutions
 - “**Digital Strategy for a Smart Spain**”
 - Trade unions and employers willingness to bargain over **digital transformation**
 - Collective agreements of 2017
- The retail sector
 - **Polarization** between small and big companies
 - **13%** of the total economy
 - 3,2 millones of workers
 - E-commerce **increase** from 100 to 210 millions of activities from 2014 to 2018
- **Actors**
 - CCOO and UGT, FETICO for the retail sector
 - CEOE, ANGED and ADIGITAL

Preliminary Findings: semi-structured interviews

- From **interviews** to the **Italian actors**
 - Trade union representatives **not aware**
 - Strategy of **neglection and adaption** but never being pro-active
 - Demonstrate other priorities
 - **Employers** association representative more **aware**
 - **Proactive** in conducting researches
 - Clear view of the problem and the advantages
 - Asking European Commission to provide homogeous regulation
- Interestingly the result of the semi-structured interviews is not mirrored on the rounded table and report both trade unions produce
 - Idea Diffusa platform by Filcams Cgil
 - Laboratory Industry 4.0 by Fisascat Cisl

Preliminary Findings: from Content Analysis

- As far, only for Italy
- From the first analysis of the **content** of collective agreements
 - Sectoral agreements
 - One **only** mentions **competition** due to e-commerce
 - Company-based agreement
 - **Not a shared** trend
 - **Not an alignment** between **national** legislation and the content of **firm-based** collective agreements
 - **Mention slightly task** operated by workers in relation to the introduction of digitalized tools
 - High level of **discretion** regarding the implementation and the implication of it

Next steps

- Interviews of **Spanish social** actors
- Going on with **content analysis of Italian collective agreement**
- Starting content analysis of **Spanish** collective agreements (?)



Thank you for your attention

Seminar

UAB 11th February 2020

Arianna Marcolin

a.marcolin@santannapisa.it

Supervisors

Professor D.Natali

Professor O. Molina Romo