

1. Fond de tableau : montée des émergents

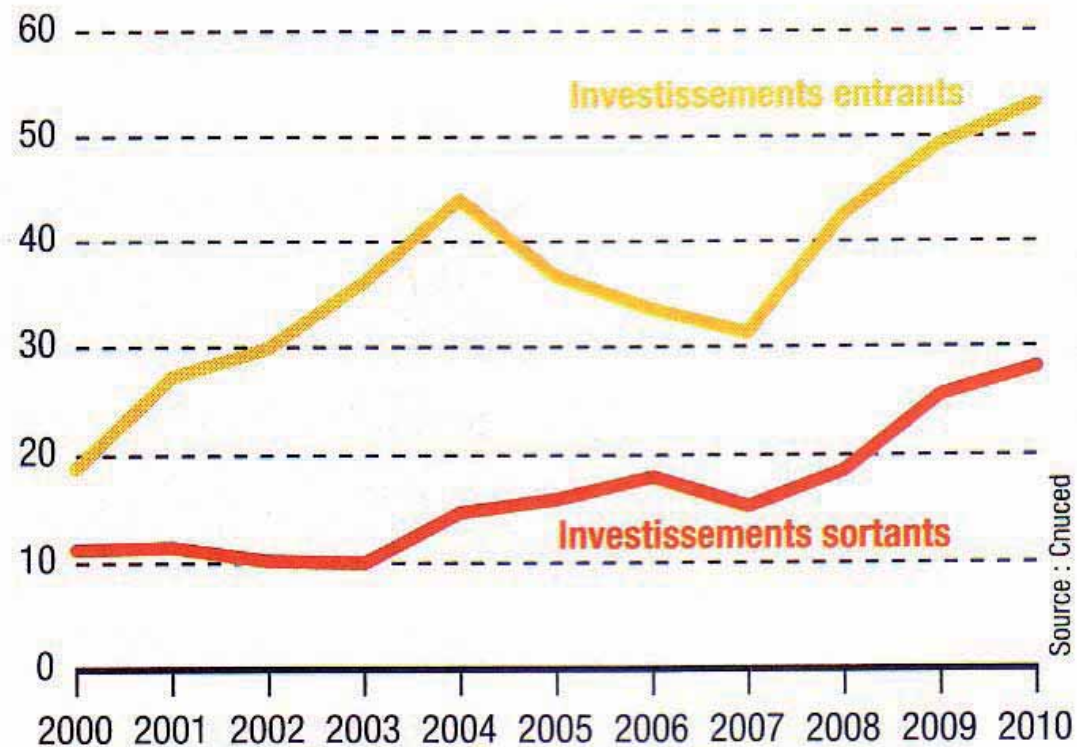
2. Made in monde, la mondialisation à grain fin

3. Quelle place pour les pays développés et la France ?
Les impasses du modèle post-industriel (ou bipolaire)

4. Tendances émergentes
mutations du travail
polarisations
une nouvelle croissance anthropocentrée/territoriale

LA MONTÉE EN PUISSANCE DES ÉMERGENTS

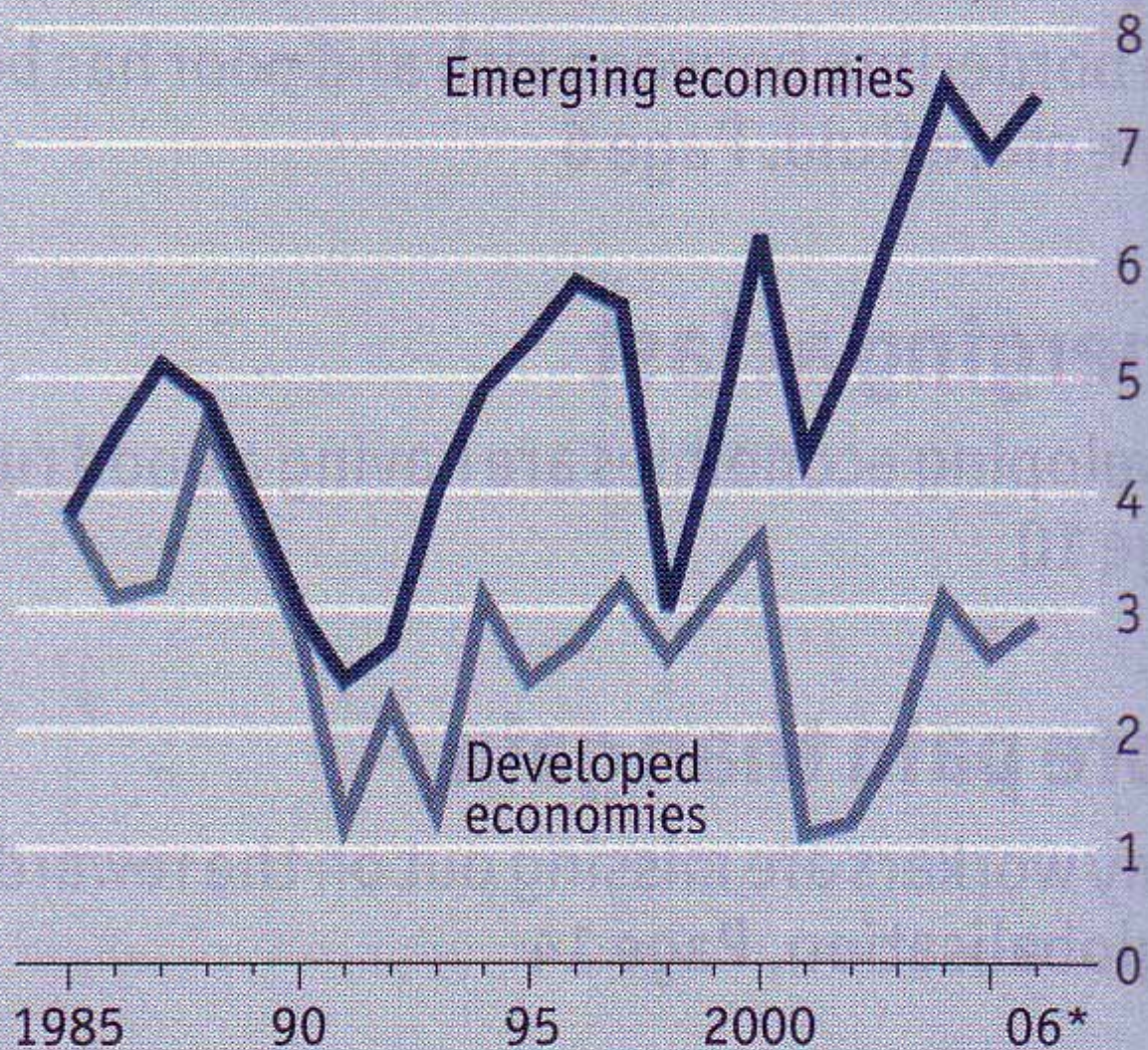
Part des pays émergents dans les flux mondiaux
d'investissements directs étrangers, en %



Speeding ahead

3

GDP, % increase on year earlier



Source: IMF

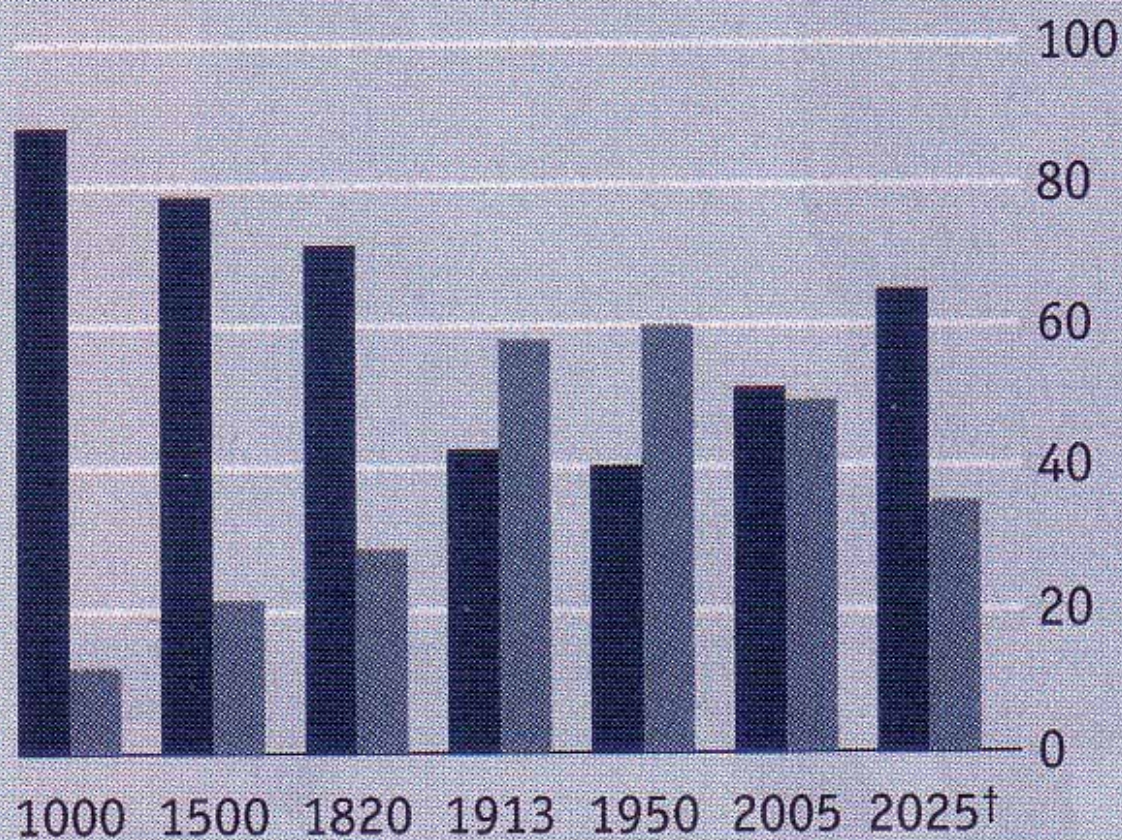
*Forecast

Re-emerging

2

Share of global GDP*, %

■ Emerging economies
■ Developed economies



*At purchasing-power parity †The Economist forecasts

Sources: OECD, Angus Maddison; IMF

Kenneth Pomeranz

Une grande divergence

*La Chine, l'Europe et la construction
de l'économie mondiale*



Albin Michel

L'évolution de l'humanité

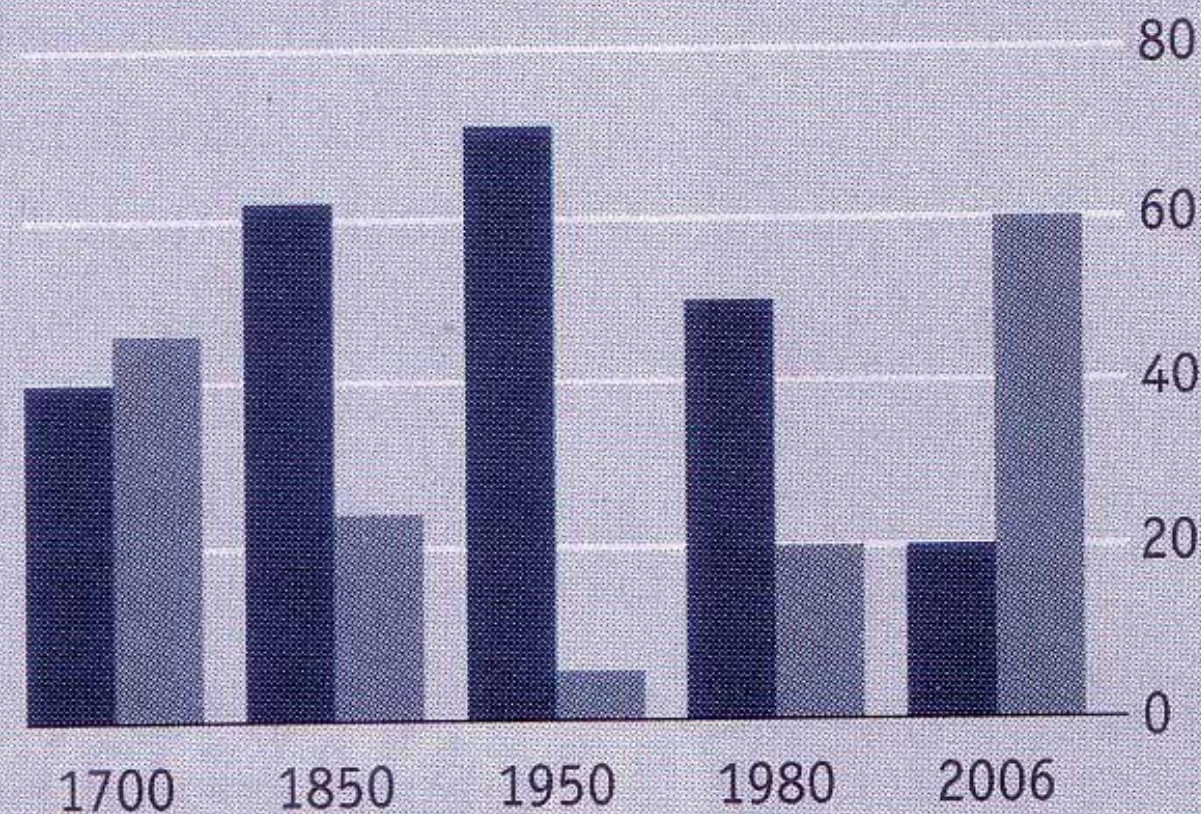


Asia's return

Middle-class population as % of world total

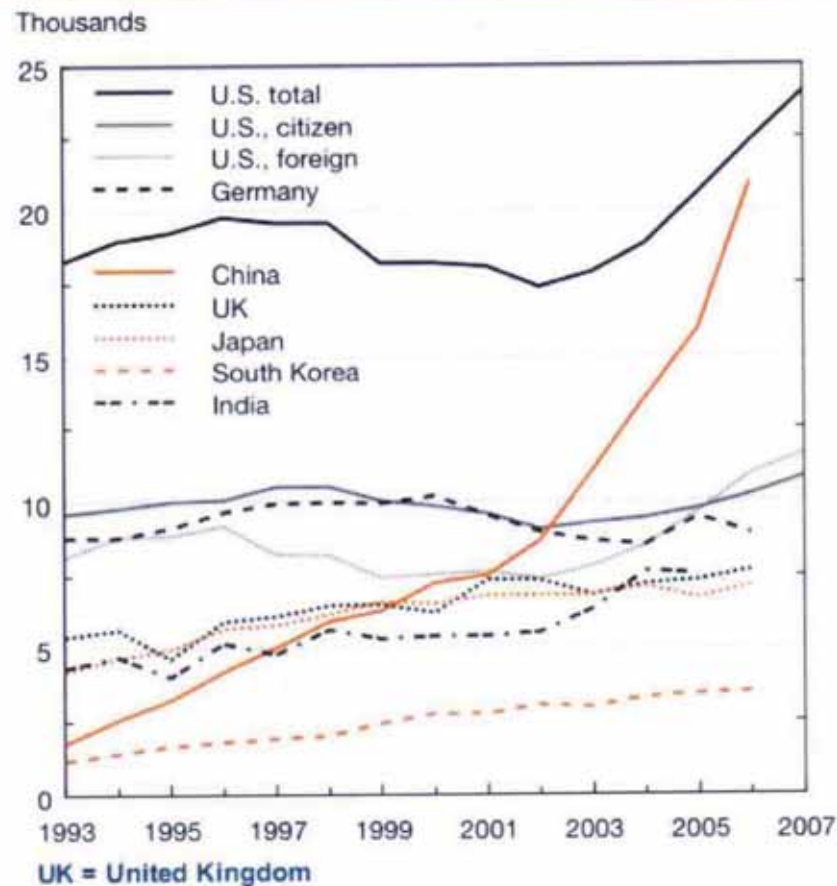
West

Asia



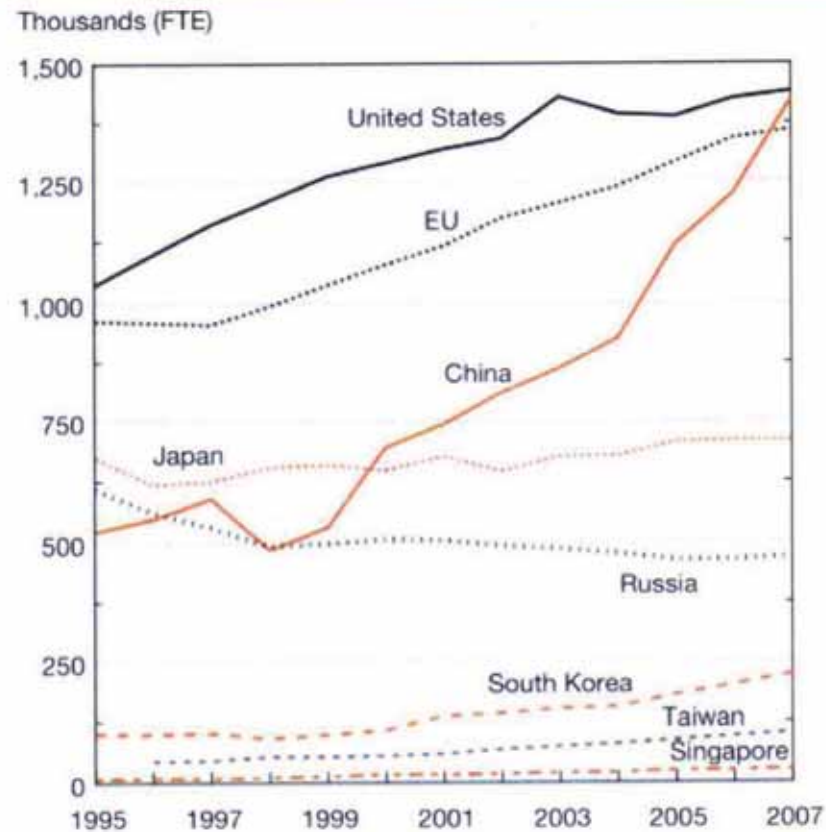
Source: Surjit Bhalla, *"The Middle Class Kingdoms of India and China"* (forthcoming)

Doctoral degrees in natural sciences and engineering, selected countries: 1993–2007



NOTE: Natural sciences include physical, biological, earth, atmospheric, ocean, agricultural, and computer sciences and mathematics.

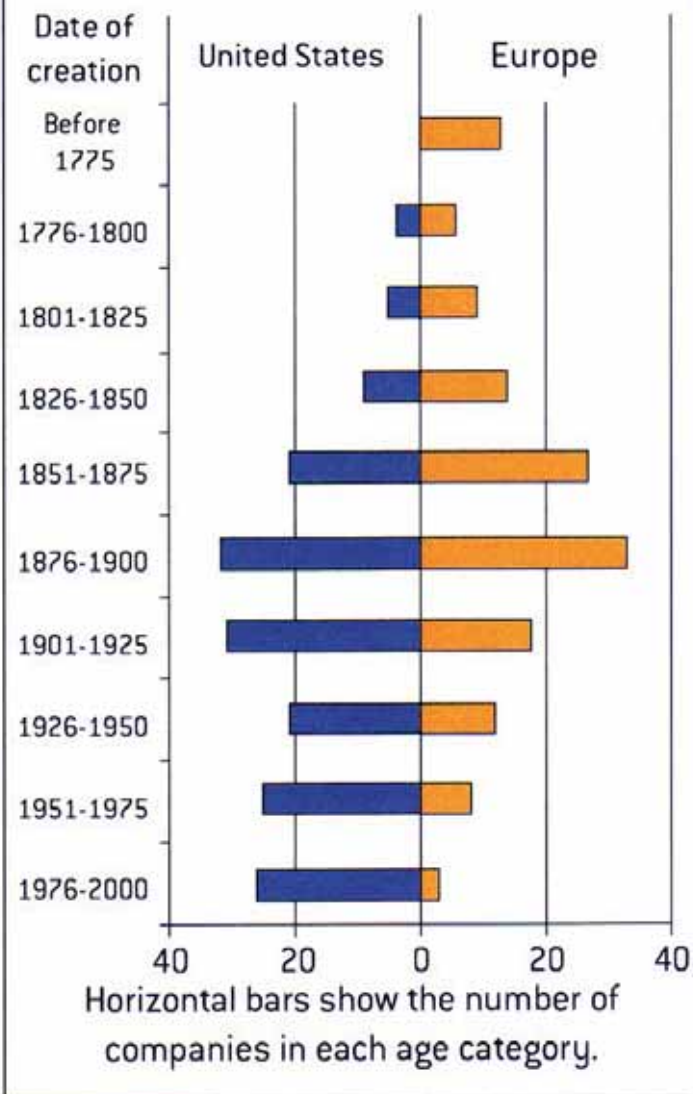
Researchers in selected regions/countries/economies: 1995–2007



EU = European Union; FTE = full-time equivalent

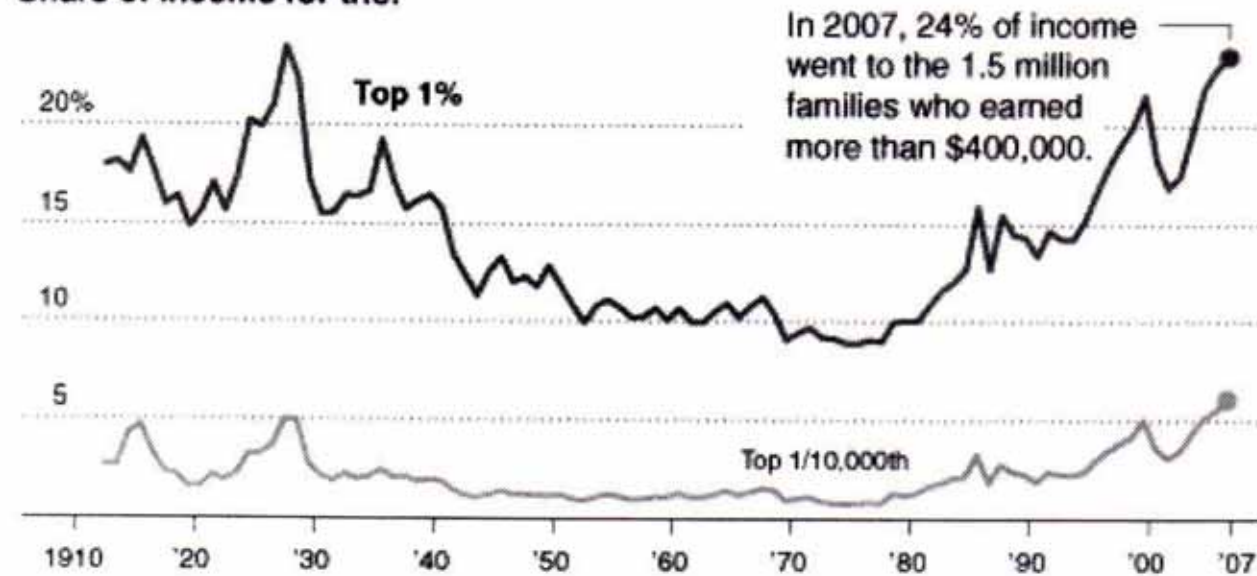
NOTES: U.S. data for 2007 estimated based on 2004–06 growth rate. EU includes all 27 member states.

Fig 1: 'Population pyramid' for largest US/European companies

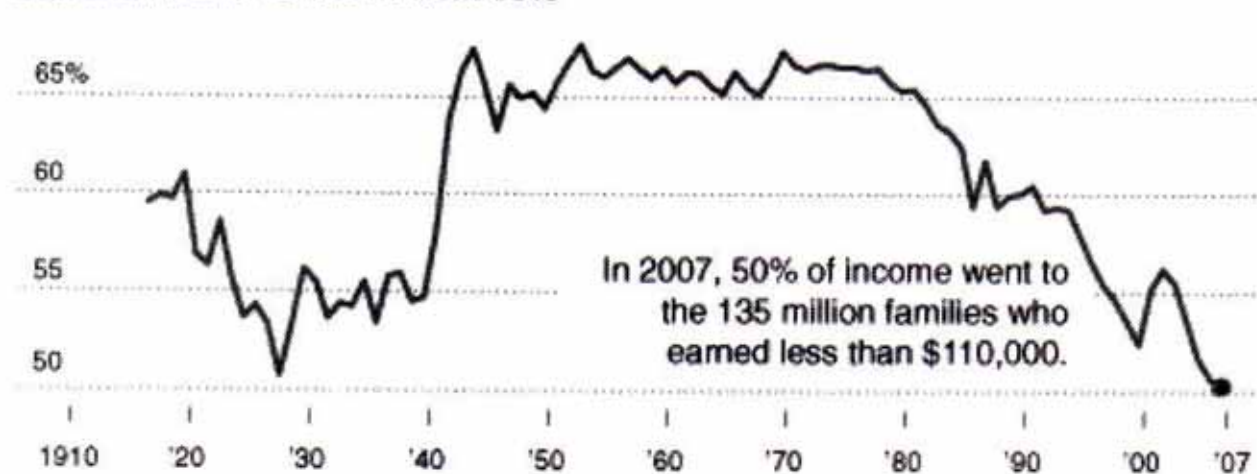


Source: Bruegel, based on FT Global 500 ranking of the world's largest listed companies, 30 September 2007.

Share of income for the:

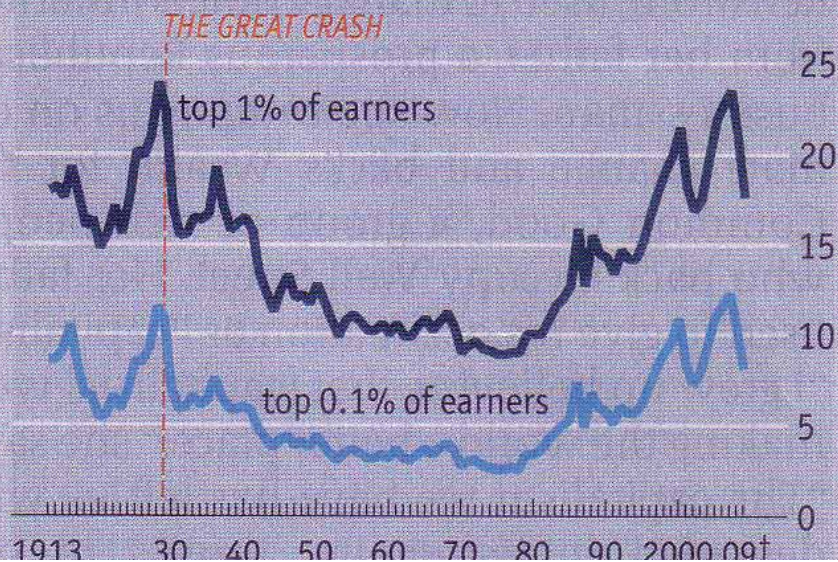


Share of income for the **bottom 90%**

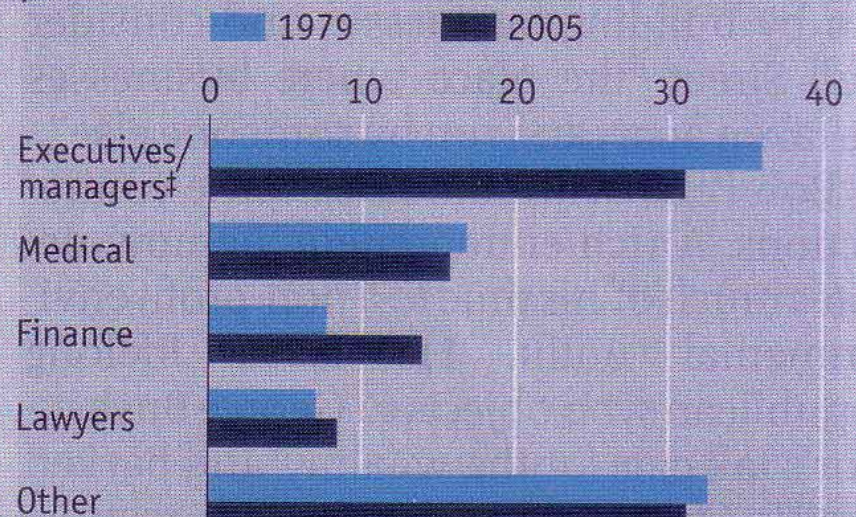


The age of Mammon

Percentage of total income earned by America's*:



Percentage of earners in top 1% income bracket by profession*



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Economie internationale (blocs nationaux) 1ere mondialisation

Economie transnationale (FMN)

globalisation progressive (et variable /secteurs)

achats

R&D

services

marketing

production (contract manufacturers)

Economie globale

optimisation des ressources

firme-réseau

De l'entreprise à la chaîne de valeur

Dégroupage

Mondialisation à grain fin



IHEDATE 2012 Pierre VELTZ

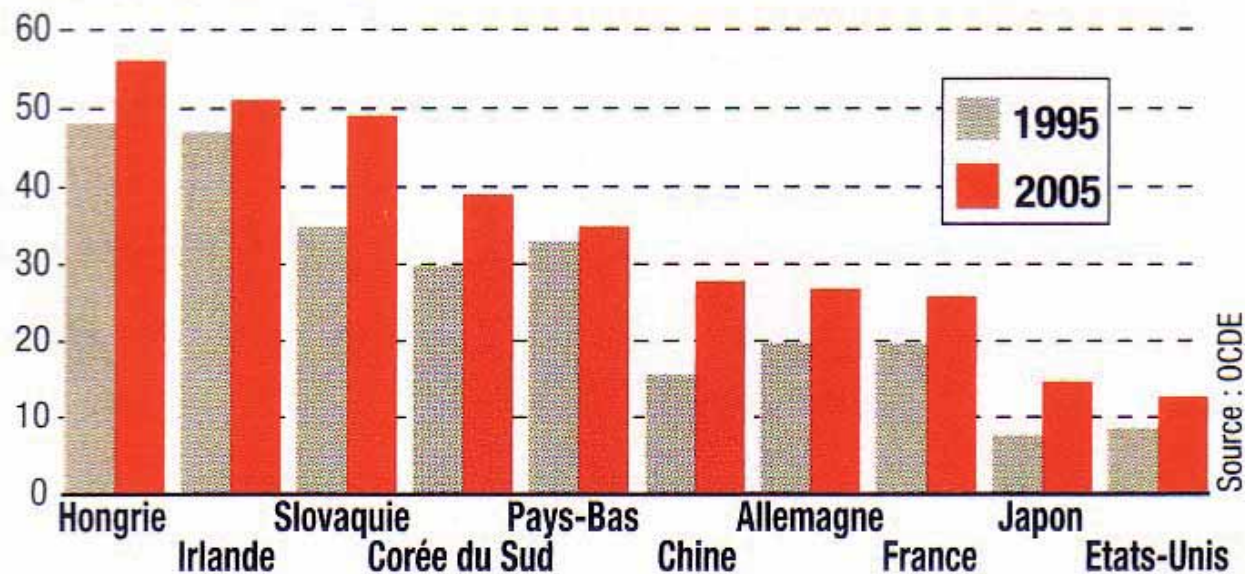


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UNE INTÉGRATION VERTICALE DE PLUS EN PLUS POUSSÉE

Contenu en importations des exportations, en %



Lecture : les exportations contiennent de plus en plus de biens intermédiaires préalablement importés. Entre 1995 et 2005, la dépendance des exportations aux importations a progressé dans presque tous les pays. L'essor de ce commerce « vertical » va de pair avec des processus de production de plus en plus internationalisés.

MAD SCIENCE
8 Renegade
Researchers

The Great
Facebook
Do-Over

The Future
of Made in
America
PAGE 104

WIRED

1 MILLION WORKERS.

90 MILLION iPHONES.

17 SUICIDES.

THIS
IS WHERE
YOUR
GADGETS
COME FROM.
**SHOULD
YOU CARE?**

0 31 75 11 00845 2

Apple

techno + design

+ supply chain

Table 1 iPod-related jobs in the value chain, 2006

	U.S.	Non U.S.	Locations
Hard drive (HDD) manufacturing	0	2,200 2,200	China Philippines
HDD inputs	0	2,550 2,550 840 800 800	China Philippines Japan Thailand Singapore
Flash memory	0	1,200 20	Korea China
Other chips	110	140 25	Taiwan Various
PCB assembly and test	0	600	China
Display panels and modules	0	900	Japan
Other inputs	0	3,500 100 100	China Japan Taiwan
Final iPod assembly	0	3,400 100	China Taiwan
Apple engineers	700		U.S.
Apple managers/professionals	5,046	75 75	Singapore Various
Apple nonprofessional	1,554	75 75	Singapore Various
Distribution	150	150	Various
Freight	250	250	Various
Apple Stores	1,785	200	Various
Other retailers	3,675	3,675	Various
Third party online sales	650	650	Various
Total	13,920	27,250	

Source: Authors' calculations. See Appendix for methodology.

Table 4 iPod-related wages by country and category, \$, 2006

	Production	Other non-professional	Engineering and other professional	Total
Apple (overhead)	0	61,728,000	488,410,000	550,138,000
Apple Stores	0	43,486,000	7,225,000	50,711,000
Other U.S.	1,429,200	114,010,060	29,580,000	145,019,260
Total U.S.	1,429,200	219,224,060	525,215,000	745,868,260
Japan	28,280,000	0	74,100,000	102,380,000
Korea	17,664,000	0	18,000,000	35,664,000
Taiwan	900,200	0	8,100,000	9,000,200
Singapore	14,115,750	0	2,000,000	16,115,750
Philippines	9,630,000	0	3,750,000	13,380,000
Thailand	1,605,000	0	750,000	2,355,000
China	18,041,100	0	5,550,000	23,591,100
Other	0	96,500,000*	19,500,000	116,000,000
Total non-U.S.	90,236,050	96,500,000	131,750,000	318,486,050

Source: Authors' calculations. See Appendix.

*Includes all non-U.S. retail and other nonprofessionals.

Over two-thirds (\$525 million) of the earnings in the United States went to professional workers, and an additional \$220 million to nonprofessional workers. While most of the nonprofessional jobs were relatively low-paying retail positions, we estimated that nearly \$50 million went to administrative jobs at Apple for which we used the national average wage of \$38,000 a year; actual Silicon Valley wages were probably even higher.

Outside the United States, total earnings were divided more evenly between the production and professional categories. Over half the professional earnings were paid in Japan and Korea, where the suppliers of most of the high-value components (hard drives, flash memory, and displays) are headquartered. Retail and distribution jobs were spread around the world in countries where the iPod is sold.

IPod 2006

14 000 emplois US

27 000 emplois hors US

2 fois plus d'emplois hors US mais 2 fois plus de salaires aux US

Touchy subject

Distribution of value for an Apple iPad
2010, % of total

Profits:

Apple
30

Other US
2

South
Korean
7

Taiwanese
2

Other
6

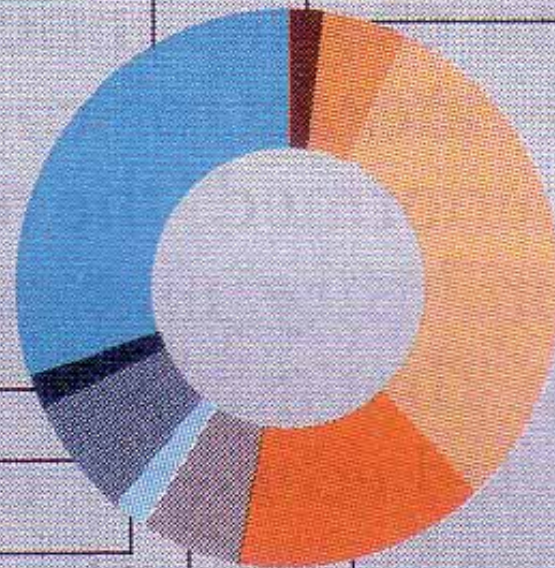
Costs:

Chinese labour
2

Non-
Chinese
labour
5

Cost of
materials
31

Distribution
& retail
15



Source: Personal Computing Industry Centre

Domination asiatique dans le hard (Samsung/Apple)

Avantage comparatif de la Chine :
plus que le faible coût du travail, flexibilité et réactivité (scale
up and down

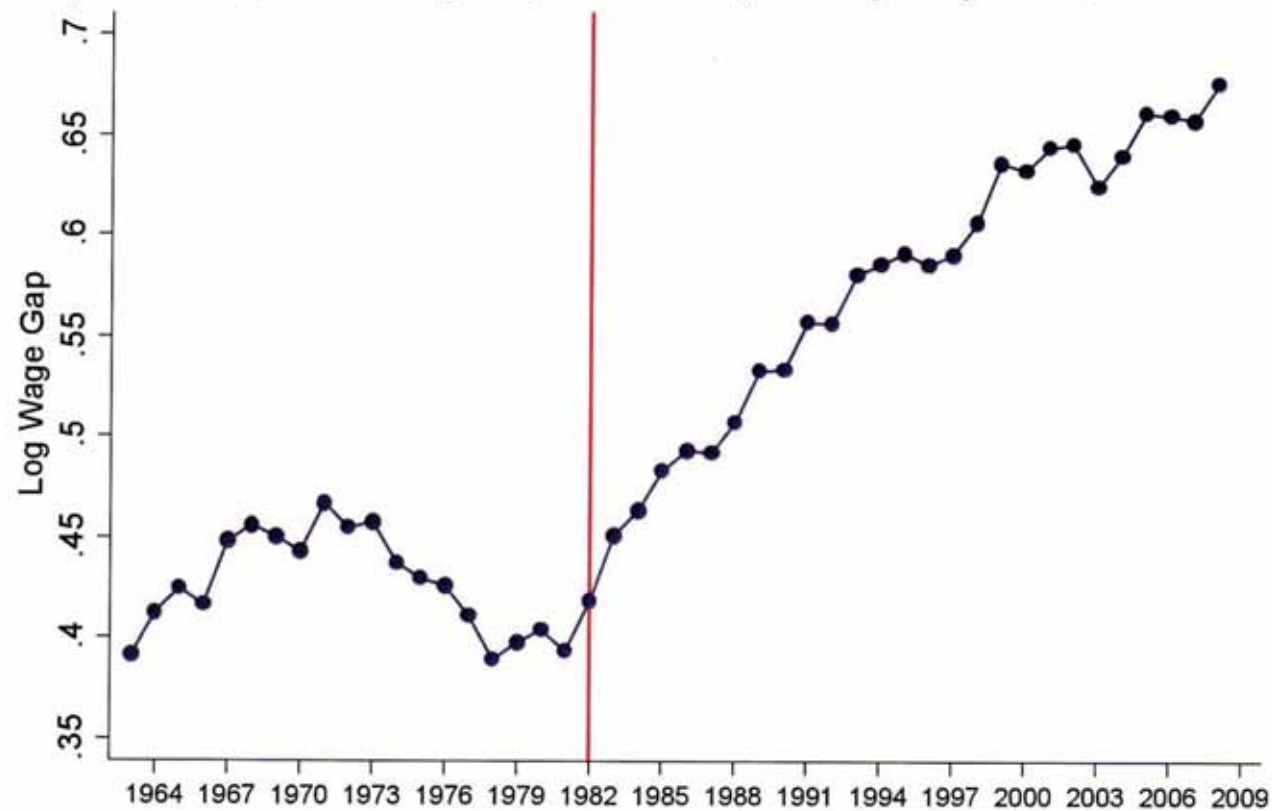
Chine assemble mais avec un contenu en imports très élevé !

trade gap à diviser par deux ? (Pascal Lamy)

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Figure 1

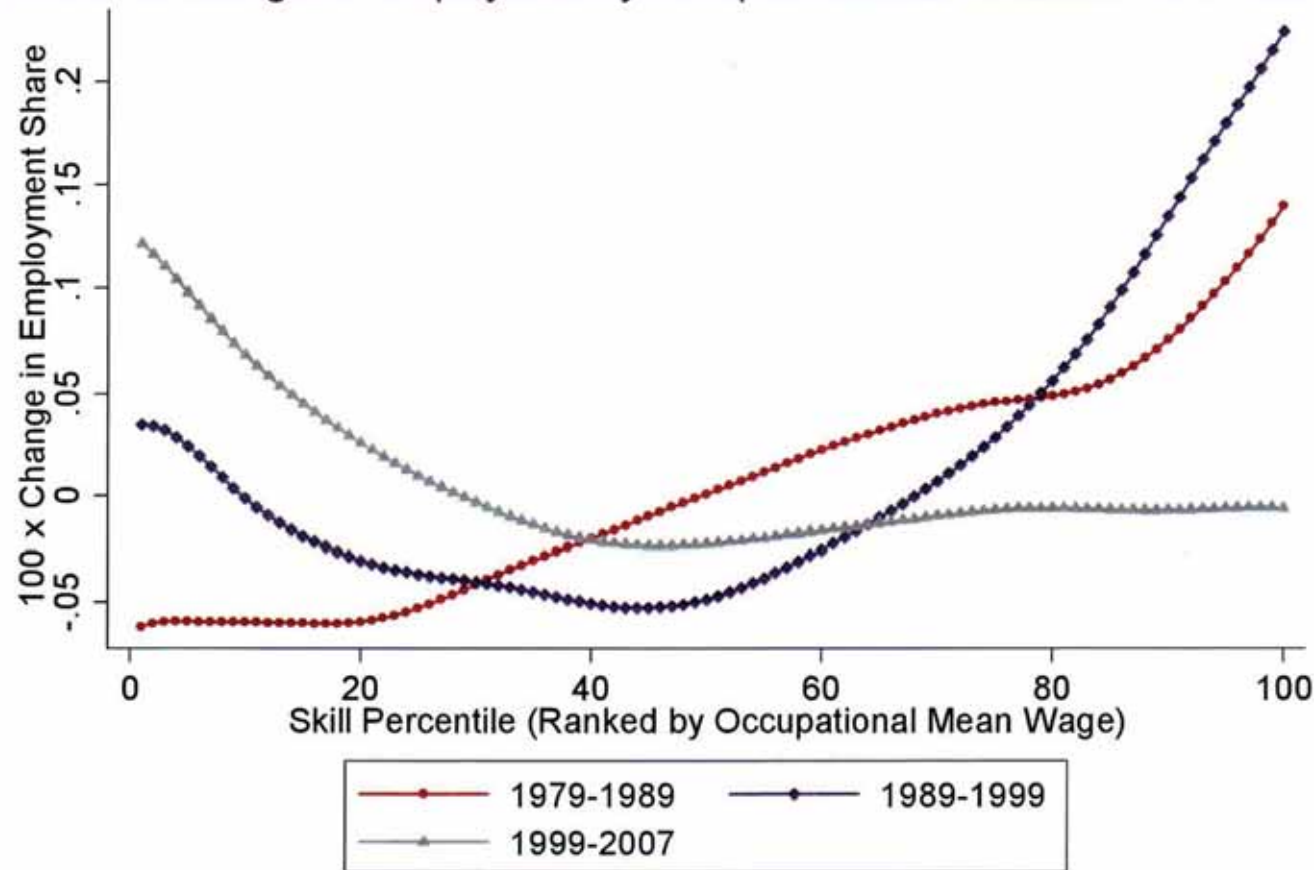
Composition Adjusted College/High-School Log Weekly Wage Ratio, 1963-2008



Source: March CPS data for earnings years 1963-2008. Log weekly wages for full-time, full-year workers are regressed in each year on four education dummies (high school dropout, some college, college graduate, greater than college), a quartic in experience, interactions of the education dummies and experience quartic, and two race categories (black, non-white other). The composition-adjusted mean log wage is the predicted log wage evaluated for whites at the relevant experience level (5, 15, 25, 35, 45 years) and relevant education level (high school dropout, high school graduate, some college, college graduate, greater than college). The mean log wage for college and high school is the weighted average of the relevant composition adjusted cells using a fixed set of weights equal to the average employment share of each group. The ratio of mean log wages for college and high school graduates for each year is plotted. See Data Appendix for more details on treatment of March CPS data.

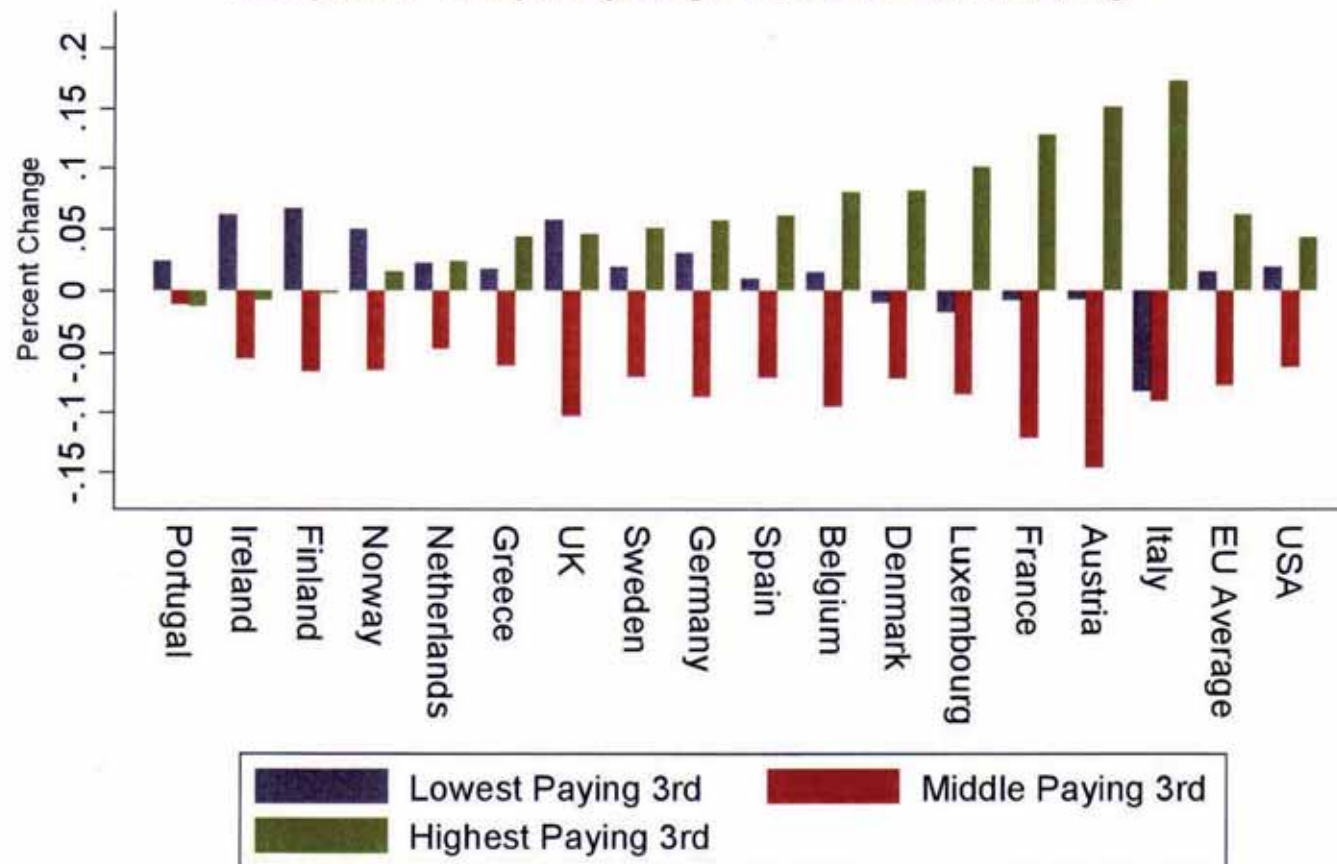
Figure 10

Smoothed Changes in Employment by Occupational Skill Percentile 1979-2007



Source: Census IPUMS 5 percent samples for years 1980, 1990, and 2000, and Census American Community Survey for 2008. All occupation and earnings measures in these samples refer to prior year's employment. The figure plots log changes in employment shares by 1980 occupational skill percentile rank using a locally weighted smoothing regression (bandwidth 0.8 with 100 observations), where skill percentiles are measured as the employment-weighted percentile rank of an occupation's mean log wage in the Census IPUMS 1980 5 percent extract. Mean education in each occupation is calculated using workers' hours of annual labor supply times the Census sampling weights. Consistent occupation codes for Census years 1980, 1990, and 2000, and 2008 are from Autor and Dorn (2009a).

Change in Employment Shares by Occupation 1993-2006 in 16 European Countries
Occupations Grouped by Wage Tercile: Low, Middle, High



Source: Data on EU employment are from from Goos, Manning and Salomons, 2009a. US data are from the May/ORG CPS files for earnings years 1993-2006. The data include all persons ages 16-64 who reported having worked last year, excluding those employed by the military and in agricultural occupations. Occupations are first converted from their respective scheme into 326 occupation groups consistent over the given time period. These occupations are then grouped into three broad categories by wage level.

Emploi manufacturier en France

- 500 000 depuis 10ans

De 24% du PIB à 14% (Allemagne 30%; zone euro 22%)

EBE 2000-2007 + 67% en Allemagne

- 14% en France

depuis 2008, la crise cible l 'industrie

	2009	2010	2011
industrie	-80	-14	-5
ensemble	-114	+12	+18

(source : trendeo)

Pourquoi le modèle bi-polaire post-industriel n'est pas soutenable

Emplois high tech peu nombreux
sablier des qualifications

Déséquilibre macro économique
baisse des salaires compensée par le crédit

Les pays émergents n'accepteront pas de rester cantonnés à l'exe

Pourquoi le modèle bi-polaire post-industriel n'est pas soutenable

Emplois high tech peu nombreux
sablier des qualifications

Déséquilibre macro économique
baisse des salaires compensée par le crédit

Les pays émergents n'accepteront pas de rester cantonnés à l'extrémité

Rééquilibrer l'industrie mondiale:

Trop extravertie en Asie

Trop faible en Europe et aux USA

Trop absente ailleurs

Emplois en France 2008

72% sédentaires 28% nomades

Dans l'industrie (Mac Kinsey Global Institute)

8% high tech

4% marques

9% « intermédiaires » fortement exposés

47% continentaux

32% instables

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Register

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The world's largest outsourcing marketplace!

How would your business change if you had
virtually unlimited labor at next to no cost?

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Post Project | Browse Jobs

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Hire a Global Workforce

1.9 million registered
professionals ready to work.

Reduce Costs

Pay as little as \$30. The
average job is under \$200!

World Class Security

Only pay once you are
100% satisfied.

24 Hour Online Support

Get help from our experts
whenever you need it.

As Featured In

**How would your business change
if you had virtually unlimited labor
at next to no cost?**

Did you know you can outsource just about anything
to someone on the other side of the world?

Posting a project takes seconds and in minutes you
will begin to receive bids.

Our secure milestone payment system means you
only pay for the work you are happy with.

1,929,696 freelance professionals

\$68,369,372 USD user earnings

856,117 projects completed

*Everything from the composition of a rap
song to help teach English to Chinese
students to designing for a luxury hotel in
Barbados.*

The Economist

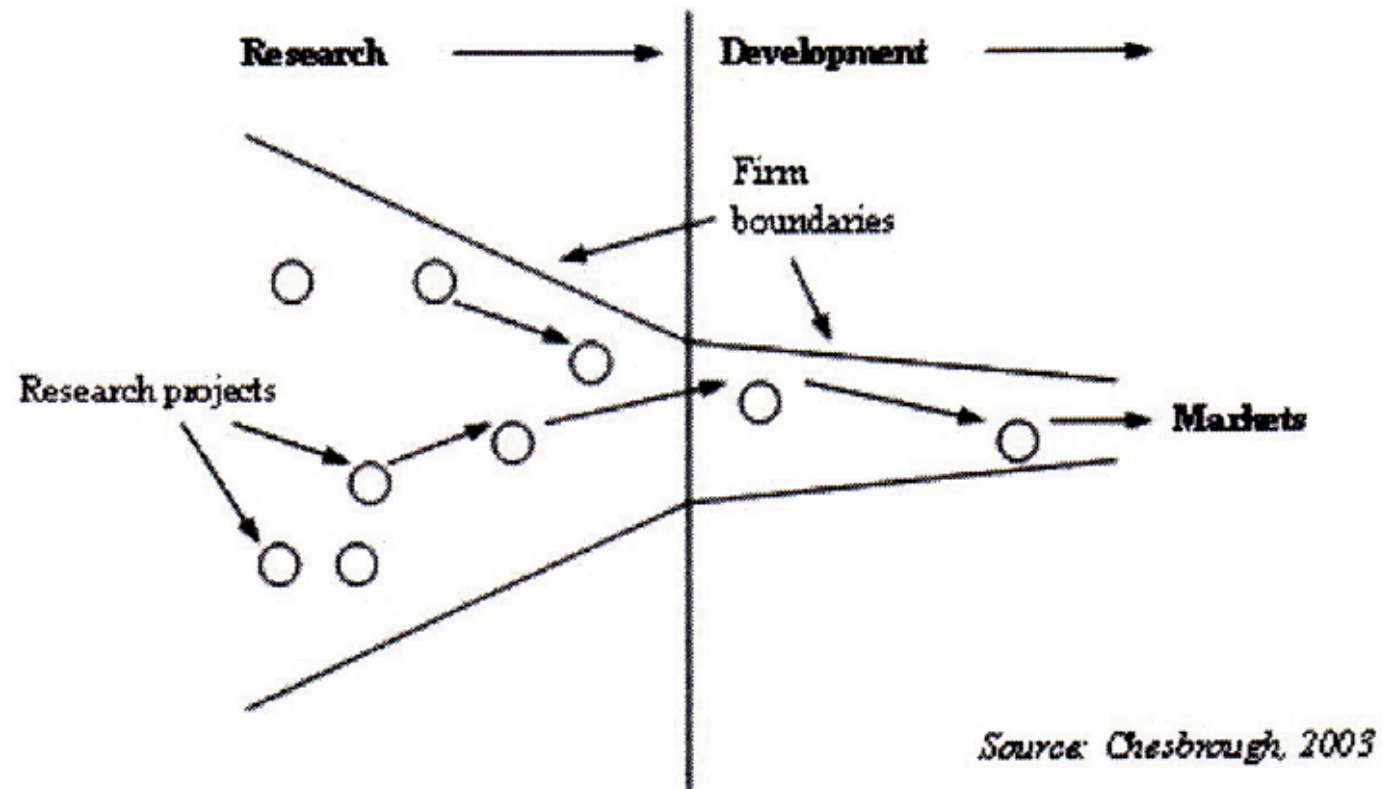


Figure 1 Closed innovation

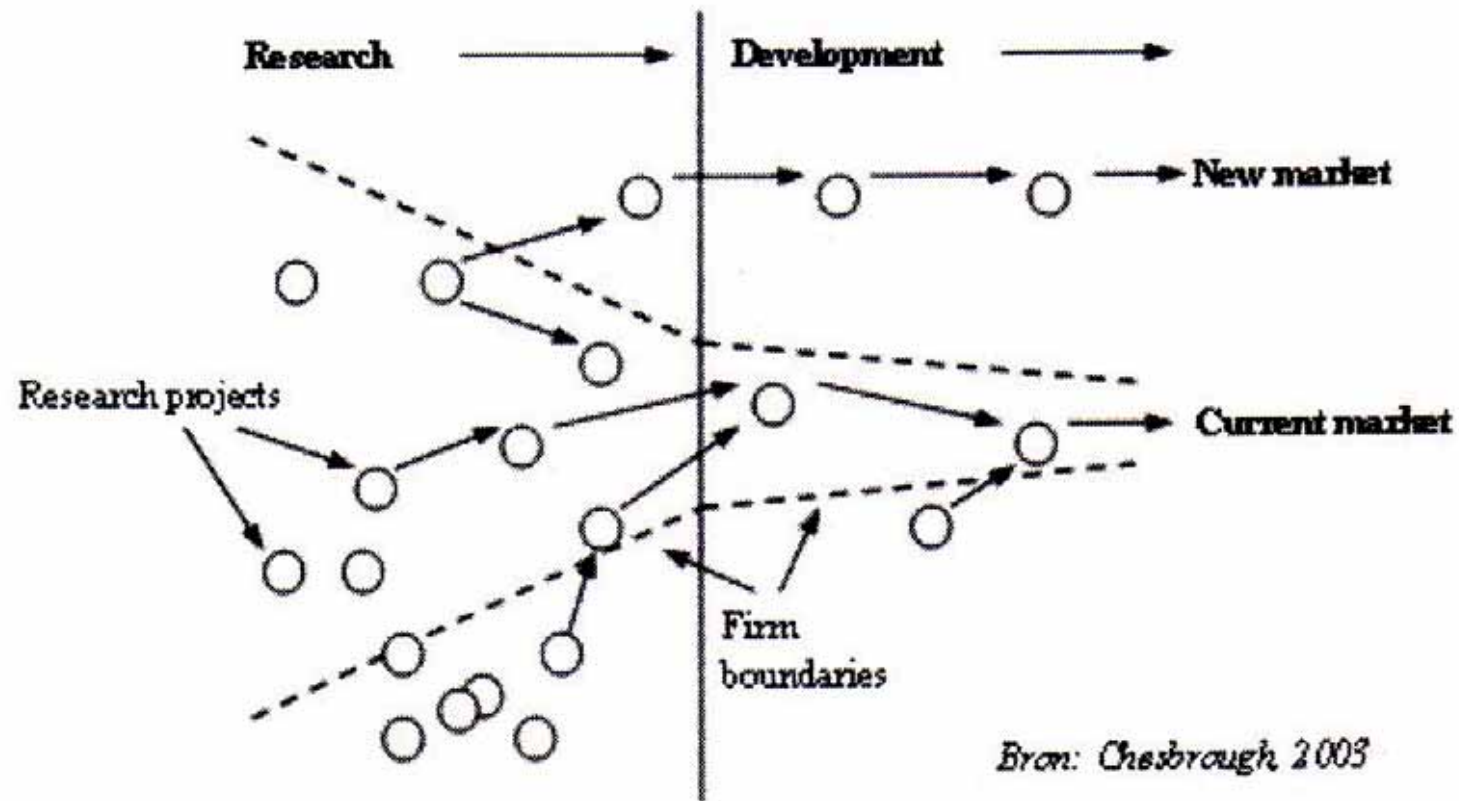


Figure 2 Open innovation

135,000+ Solvers | 175 Countries | 40 Industry Disciplines and G

Welcome to InnoCentive!

Join the InnoCentive Open Innovation community to solve some of the toughest problems facing the world today. Win cash awards of up to \$1,000,000 for your creative solutions to Challenges in:

- Business and Entrepreneurship
- Chemistry
- Engineering and Design
- Life Sciences
- Math and Computer Science
- Physical Sciences

Our Open Innovation Marketplace Challenges are posted by Seekers (corporations, government agencies, and nonprofit organizations) who are looking for your help with product development and other business and science problems. Each Challenge has a significant cash award associated with it. If your solution is chosen – you win!

Join now to become an InnoCentive Solver - your solution today could contribute to the breakthrough inventions of tomorrow.

Search: HITs

GO!

Complete simple tasks that people do better than computers. And, get paid for it. [Learn more.](#)

Choose from thousands of tasks, control when you work, and decide how much you earn.

If you are a software developer and would like to learn more about using Amazon Mechanical Turk APIs, [click here.](#)

Get Started Now

 Step 1 - Find - Find HITs to work on

What is a HIT?

HIT stands for Human Intelligence Task. These are tasks that people are willing to pay you to complete. For example a HIT might ask: "Is there a pizza parlour in this photograph?" Typically these tasks are extraordinarily difficult for computers, but simple for humans to answer.

How do I find HITs to work on?

Just click the "Get Started Now" button to browse thousands of available HITs, without any obligation.

 Step 2 - Finish - Work & submit your HIT

How do I work on a HIT?

Once you have chosen a HIT to complete, click the "Accept HIT" button to have it assigned to you.

Follow the instructions on how to complete the HIT and when you are done, click the "Submit" button to save your answer.

 Step 3 - Earn - Get paid for your work

How do I get paid?

You are paid when your answer is approved by the person that listed the HIT.

The money you earn is deposited into your Amazon.com account, where you can turn it into cash at any time by transferring it to your personal checking account.

IBM crowd sourcing could see employed workforce shrink by three quarters

Louisa Peacock 23 April 2010 16:53

Multinational firms saddled with huge people costs are considering downsizing their permanent workforce and hiring sub-contractors on a scale never seen before - presenting an "enormous" management task for HR.

IT giant IBM told *Personnel Today* that the firm's global workforce of 399,000 permanent employees could reduce to 100,000 by 2017, the date by which the firm is due to complete its HR transformation programme.

Tim Ringo, head of IBM Human Capital Management, the consultancy arm of the IT conglomerate, said the firm would re-hire the workers as contractors for specific projects as and when necessary, a concept dubbed 'crowd sourcing'.

"There would be no buildings costs, no pensions and no healthcare costs, making huge savings," he said.

Outsourcing experts said employers from both the private and public sector were increasingly using the model as they looked to squeeze people costs post-recession.

What is crowd sourcing?

Crowd sourcing is the act of taking a job traditionally performed by an employee and outsourcing it to an undefined group of people on a project-by-project basis, in the form of an open call.

The “Human Cloud” and the Future of Work

By [Mathew Ingram](#) Nov. 11, 2010, 2:52pm PDT [7 Comments](#)

- 80 nerer
- 80 personnes aiment ça.



One thing we write about a lot at GigaOM — and particularly on [our Web Worker Daily](#) collaboration blog — is the future of work. It’s not just about the tools like Skype and Jive Software and Yammer and Rypple that try to make personal interaction easier online, although it is partly about that. It’s also about how working in new and different ways changes our lives, for better and for worse, and how the entire nature of what we call work is evolving and blurring online.

L 'archipel des grandes régions métropolitaines

10 premières

400 millions d 'hab. 6% pop

43 % PIB

60 à 70 % Science et technologie

Formes territoriales

pôles et réseaux

enclaves

districts spécialisés

métropoles = hub (commutateurs)

croisement des grands flux

+capacités de flexibilité internes

structure interne : pôles et réseaux

Formes politico-territoriales : cités-Etats...

Marche mondial des périphéries

Pistes d'avenir

conversion écologique et énergétique

néo-industrialisation des services anthropocentrés
mobilité, santé, éducation

Réinventer les villes et les territoires

La ville comme « infrastructure générale » d'une
économie nouvelle contributive

