

# G20



Oficina  
Internacional  
del Trabajo

# Débil recuperación del empleo con continuo alto desempleo y déficit de trabajo decente

Actualización sobre tendencias del empleo  
y del mercado laboral en países del G20

Informe de la OIT con motivo de la Cumbre del G20 en Seúl,  
11 y 12 de noviembre de 2010

OFICINA INTERNACIONAL DEL TRABAJO  
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## Principales tendencias

1. La OIT estima que a nivel mundial el desempleo alcanzó 210 millones de personas a mediados de 2010, es decir 30 millones por encima del nivel de 2007.
2. Los datos disponibles hasta el tercer trimestre de 2010 muestran una situación frágil en el mercado laboral de todos los países del G20 y con señales de una recuperación débil, más enérgica en los países emergentes que en los países con altos ingresos. El número de personas disponibles para trabajar, involucradas en la búsqueda activa de trabajo o no, sigue siendo mucho mayor que el número de empleos disponibles en la mayoría de los países. Las horas de trabajo y las tasas de participación de la fuerza de trabajo disminuyeron, mientras que el subempleo por insuficiencia de horas y las personas que renunciaron a buscar empleo aumentaron, lo cual pone de manifiesto una desaceleración del mercado laboral superior a la reflejada en la tasa de desempleo.
3. A mediados de 2010, las tasas de desempleo en los países del G20 se situaban entre 25 y 5 por ciento, con una media de 7,8 por ciento. En 2010, comparado con el mismo período en 2009, el desempleo ha continuado aumentando en diez países del G20 y disminuyendo en ocho. Todas las economías emergentes, con excepción de Sudáfrica, experimentaron un aumento del empleo y una disminución del desempleo durante 2010. Sin embargo, el desempleo a mediados de 2010 es 70 por ciento superior a los niveles anteriores a la crisis en los países de altos ingresos (excluyendo Europa), y 30 por ciento superior en Europa. En todos los países, el desempleo para los hombres ha aumentado más que para las mujeres. En 18 países con datos disponibles para la primera mitad de 2010, 70 millones de personas estaban registradas como desempleadas (15,5 en Europa, 22 en otras economías de altos ingresos y 32,5 en las economías emergentes).
4. El desempleo juvenil es en promedio el doble de la tasa de desempleo total, cerca de 16-20 por ciento en los países del G20. La tasa de aumento del desempleo, total y juvenil, ha disminuido en la primera mitad de 2010.
5. En la mayoría de los países, se observa un crecimiento positivo del empleo en el segundo trimestre de 2010, si se compara con el primer trimestre de 2010 y una vez ajustado por estacionalidad. El empleo volvió a su nivel de 2006 en los países con altos ingresos y está alrededor de 8 por ciento por encima de ese nivel en los países emergentes. En la mayoría de los países, se registraron disminuciones importantes en el empleo en la industria manufacturera y en la construcción.
6. Los salarios reales están, en promedio, 4 por ciento por debajo de los niveles anteriores a la crisis.
7. El desempleo está acompañado por otras variables que reflejan el número de personas disponibles para trabajar, lo cual amplía la brecha entre la oferta de empleo y las personas que quieren trabajar. La población económicamente activa se ha estancado en los países de altos ingresos, mientras que ha crecido de manera significativa en las economías emergentes. Las tasas de participación de la fuerza de trabajo han disminuido en las economías de altos ingresos, permanecieron sin variación en Europa, y aumentaron un poco en las economías emergentes. En varios países con datos disponibles, el número de personas que renunciaron a buscar trabajo de manera activa, y que por lo tanto no figuran como desempleados, ha aumentado de manera significativa. El subempleo por insuficiencia de horas se ha estabilizado en 2010, pero permanece alto en varios países.
8. El crecimiento económico -muy heterogéneo pero débil en general-, los flujos inestables de capital y las tensiones sobre las divisas que se observan en la actualidad, pueden ser atribuidas a las tendencias del empleo y del mercado laboral que predominan en los países del G20. Estas tendencias incluyen desigualdades de ingresos cada vez mayores y un nulo o escaso crecimiento de los salarios para una amplia mayoría de los asalariados, que en última instancia se reflejan en desequilibrios macroeconómicos de deficiencias en la demanda agregada, y superávit y déficit de cuenta corriente.
9. En un enfoque basado en los ingresos, las políticas que conducen al empleo productivo y el crecimiento con alto coeficiente de empleo incluyen: mayor atención a las pequeñas empresas, expansión gradual de la protección social básica en todos los países, aumento de los salarios reales al mismo ritmo que el incremento de la productividad y mayor protección - a través del salario mínimo- de quienes cuentan con bajos salarios. Este tipo de políticas contribuyen directamente a reducir los desequilibrios mundiales y promueven un crecimiento sólido, sostenible y equilibrado.
10. La participación femenina en la fuerza de trabajo ha aumentado en Europa y en los países emergentes entre 2007 y 2010, incluso en relación con las tasas de participación masculina, y ha disminuido menos en los países de altos ingresos (fuera de Europa) en comparación con los hombres.
11. La crisis ha acelerado los cambios estructurales en todas las economías, con una disminución importante en el empleo en la industria manufacturera en todas las economías con altos ingresos (más de 10 por ciento en comparación con 2006) y en las economías emergentes (cerca 3 por ciento en comparación con 2006). Como resultado, el porcentaje del empleo en la industria manufacturera disminuyó en todos los países, entre 1,5 y 3 puntos porcentuales. El anexo 1 ofrece una visión

general de las tendencias recientes del empleo en algunos sectores.

12. Los salarios reales en la industria manufacturera disminuyeron en promedio 4 por ciento durante la primera mitad de 2010, en relación con el período anterior a la crisis. Las horas de trabajo disminuyeron en la primera mitad de 2009, se recuperaron un poco en la segunda mitad y volvieron a descender en los primeros meses de 2010.

13. La capacidad de los países de reaccionar a los desequilibrios del mercado laboral es más lenta que antes de la crisis. Esto incluye altas cuotas de empleo informal y ocasional, aumento de las desigualdades, escaso o ningún crecimiento del salario real y poca cobertura de protección social. El crecimiento continuo de la población activa en la mayoría de los países durante los años de crisis ha amplificado el desafío y la urgencia de enfrentar estos desequilibrios en el futuro.

14. Se prevé que el empleo en los países emergentes crecerá de tal manera que, en 2015, los niveles de empleo se situarán 8 por ciento por encima de los niveles anteriores a la crisis, mientras que en las economías de altos ingresos es poco probable que el empleo vuelva a los niveles de 2008 en los próximos cinco años. En los próximos 10 años, el mundo necesitará crear 440 millones de empleos sólo para absorber los trabajadores que entrarán a formar parte de la fuerza laboral, 210 millones de los cuales estarán en los países del G20.

***Sólo la introducción del informe está disponible en español; el resto del informe está en inglés.***

### Section 1: Recent labour market trends in G20 countries<sup>1</sup>

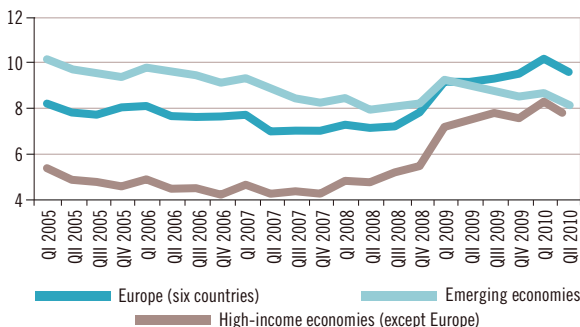
Despite clear signs of output recovery, half of G20 countries still experience an increase in unemployment rates in 2010.

In the following analysis, data are aggregated into three groups: Europe includes France, Germany, Italy, Netherlands, Spain, and United Kingdom. High-income Economies (except Europe) include Australia, Canada, Japan, Korea, and the United States. Emerging economies include Argentina, Brazil, Indonesia, Mexico, Russia, South Africa, and Turkey.

In the second quarter of 2010 aggregate unemployment rates across these three G20 country groupings lie between 8 and 10 per cent. Figure 1 shows that there is a strong correlation between economic growth and reduction in unemployment, although other factors influence the dynamics of unemployment across countries.

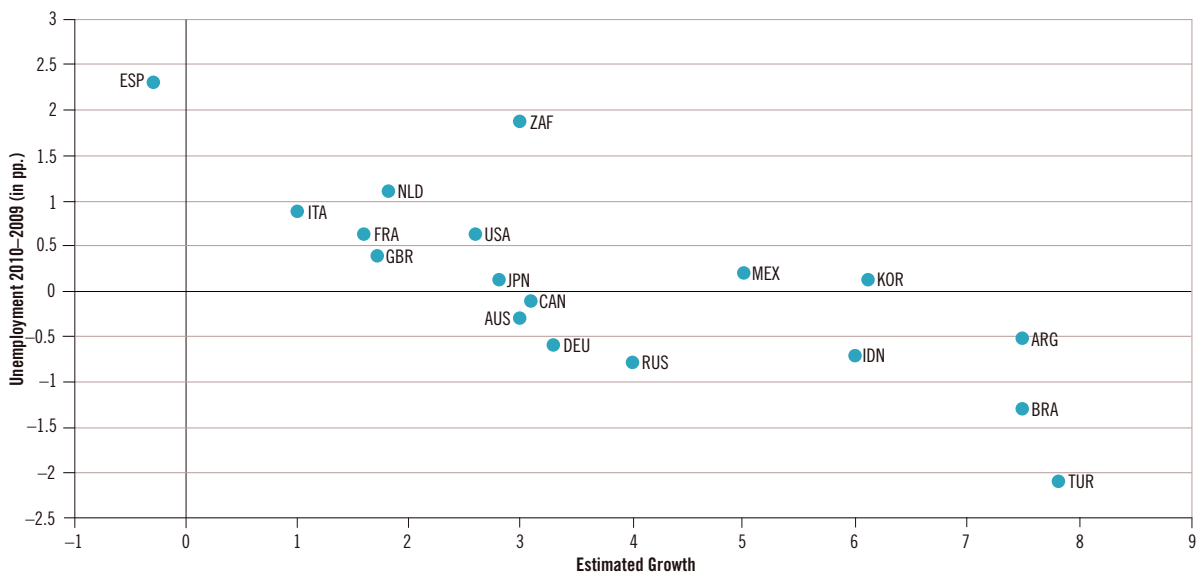
In emerging countries unemployment peaked in mid 2009 and has been declining moderately since. Unemployment has reached historically high values in high income economies. In many countries unemployment is still rising, yet the rate of increase has decelerated since the third quarter of 2009. Mid 2010, unemployment rates are on average 30 per cent above pre-crisis levels in Europe and 70 per cent above in other high income economies (Figures 2-4).

Figure 2. Unemployment rate (percentage)



<sup>1</sup> Data for employment and unemployment are available in the ILO short term indicators of the labour market database, compiled from national labour force and establishment surveys and available at: <http://laborsta.ilo.org/sti/>. Data are not seasonally adjusted.

Figure 1. Growth and unemployment in 2010 (percentage)



Source: ILO labour statistics database.

Table 1 provides the latest official unemployment data available for the G20 countries.

**Table 1. Unemployment rate 2009 and 2010 in G20 countries**

| Country            | Latest Period with Data | Unemployment Rate (January–Latest Period with Data) 2009 | Unemployment Rate (January–Latest Period with Data) 2010 | Variation of Unemployment Rate (P.P) |
|--------------------|-------------------------|--|--|--------------------------------------|
| Argentina*         | 2nd Quarter             | 8.6  | 8.1  | -0.5                                 |
| Australia          | 3rd Quarter             | 5.7  | 5.4  | -0.3                                 |
| Brazil*            | Aug.                    | 8.5  | 7.2  | -1.3                                 |
| Canada             | 3rd Quarter             | 8.4  | 8.3  | -0.1                                 |
| China <sup>±</sup> | 2009                    | 4.3  |  | -                                    |
| France             | Aug.                    | 9.2  | 9.8  | 0.5                                  |
| Germany            | Aug.                    | 7.7  | 7.1  | -0.5                                 |
| India <sup>+</sup> | 2009                    | 2.7  |  | -                                    |
| Indonesia          | 1st Semester            | 8.1  | 7.4  | -0.7                                 |
| Italy              | Aug.                    | 7.5  | 8.4  | 0.9                                  |
| Japan              | Aug.                    | 5.0  | 5.1  | 0.1                                  |
| Korea, Republic of | Aug.                    | 3.8  | 3.9  | 0.1                                  |
| Mexico             | 2nd Quarter             | 5.1  | 5.3  | 0.2                                  |
| Netherlands        | Aug.                    | 3.5  | 4.6  | 1.0                                  |
| Russian Federation | Aug.                    | 8.6  | 7.8  | -0.8                                 |
| Saudi Arabia       | 2009                    | 5.7  |  | -                                    |
| South Africa       | 2nd Quarter             | 23.4   | 25.3   | 1.8                                  |
| Spain              | Aug.                    | 17.7   | 20.0   | 2.3                                  |
| Turkey             | 2nd Quarter             | 14.5   | 12.4   | -2.1                                 |
| United Kingdom     | Jul.                    | 7.4  | 7.8  | 0.4                                  |
| United States      | 3rd Quarter             | 9.2  | 9.8  | 0.6                                  |

Notes: \* Urban unemployment rate; ±Registered unemployment rate in urban areas; +Projections from Ministry of labour and employment.

Source: National labour force surveys (except where indicated) as compiled by the ILO.

Data not seasonally adjusted.

**Figure 3. Variation in the unemployment rate over the last 12 months (percentage points)**

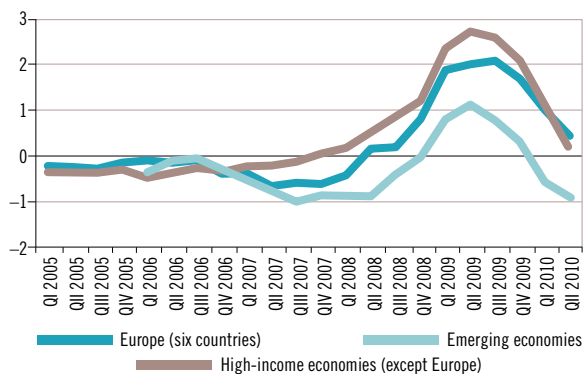
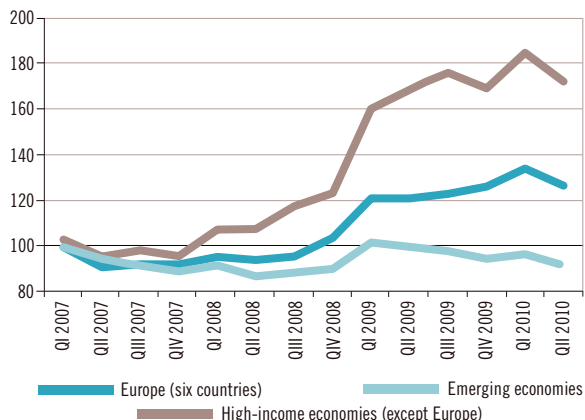
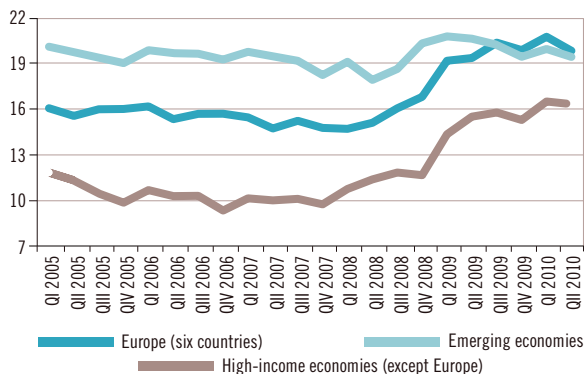


Figure 4. Trend in unemployment (index 100 = 2006)



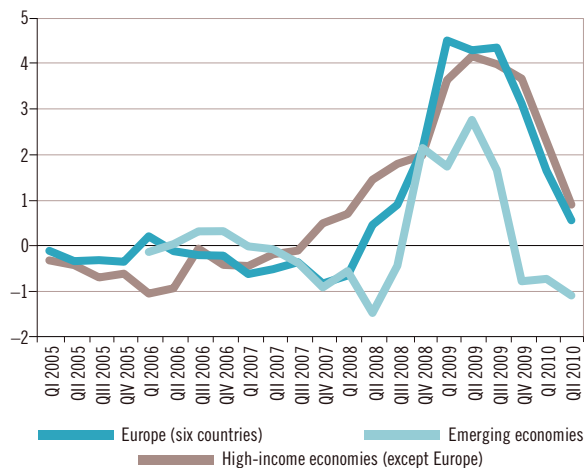
The employment prospects of young women and men are dramatic. Unemployment rates for persons less than 25 years average 16-20 per cent across G20 countries (Figures 5-6). These rates practically duplicate those for the total population. However, as for the aggregate, the rate of increase in youth unemployment is decreasing.

Figure 5. Youth unemployment rate (in per cent)



Note: Emerging economies do not include Argentina.

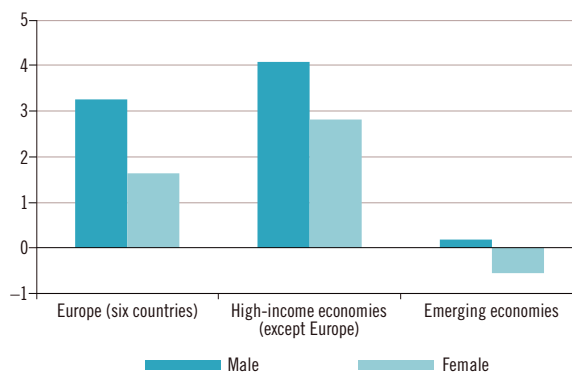
Figure 6. Youth unemployment rate, variation over the last 12 months (in percentage points)



Note: Emerging economies do not include Argentina.

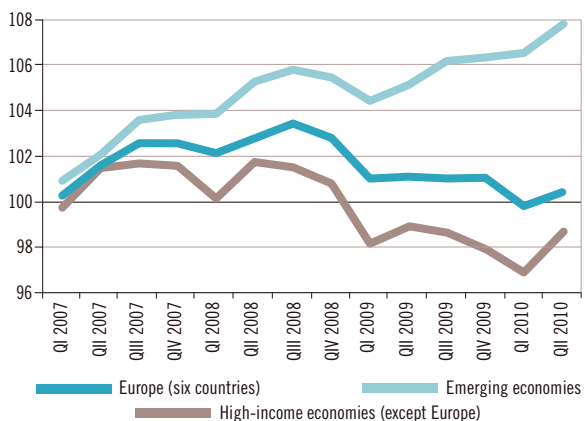
When disaggregating data by sex, it is observed that unemployment rates have risen more for the male than the female population (Figure 7) In high income economies during 2010, unemployment has been lower for women than for men. In emerging economies female unemployment has declined whereas male unemployment has risen.

Figure 7. Variation of male and female unemployment rates, (2010-2007, in percentage points)

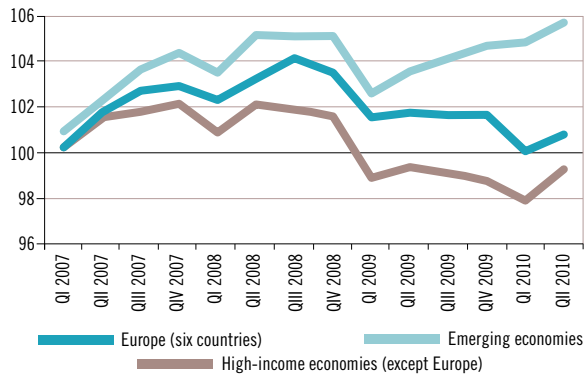


Employment has decreased in all high income economies since the third quarter 2008 and is now close to the 2006 level. In emerging economies, employment growth recovered in the second quarter of 2009 and has been growing since (Figures 8-9). Trends in paid employment are similar to those for total employment.

Figure 8. Trend in employment (index 100 = 2006)

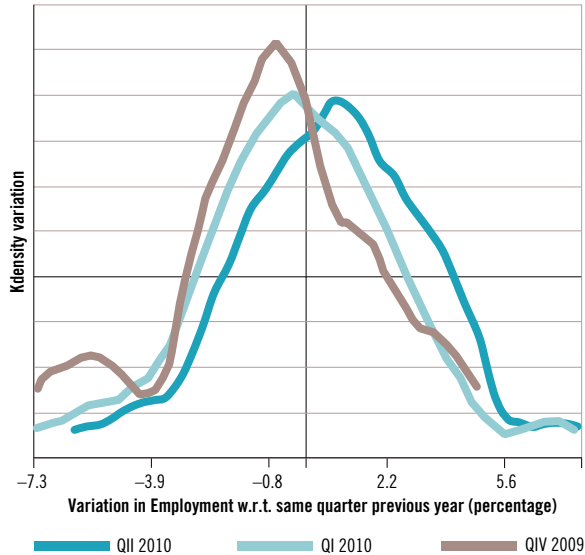


**Figure 9. Trend in paid employment, (index 100 = 2006)**



A slight upturn in the employment situation can be observed since the second quarter of 2010. When compared with the same quarter in the previous year, one can observe that the distribution of variations has moved to the right (Figure 10). In the second quarter of 2010 a majority of countries (ten against eight) experienced employment growth. In last quarter of 2009 the number of countries with employment growth was only six.

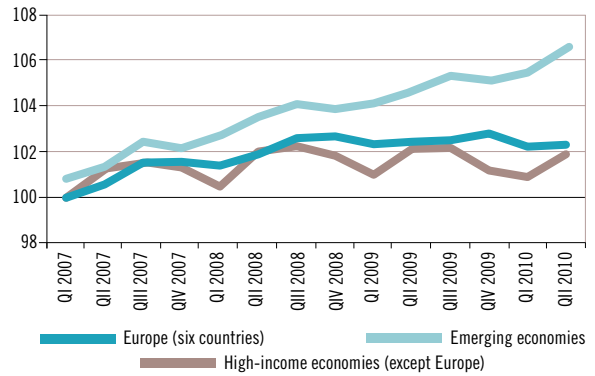
**Figure 10. Distribution (Kernel densities) of variation in employment: various quarters**



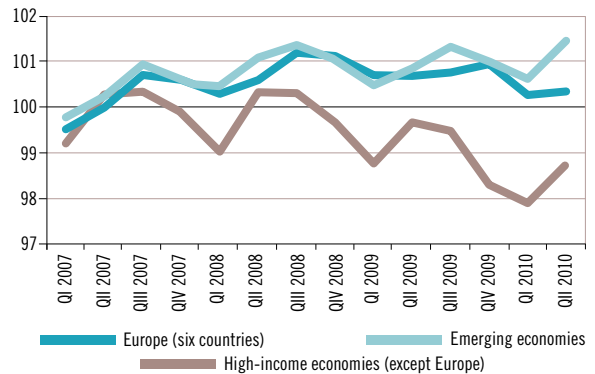
Growth in the economically active population has been modest, especially in high income economies. Consequently labour force participation has declined, more significantly in high income countries other than Europe. This decline is a consequence of the depressed labour market leading persons to withdraw from active employment search. In Europe, with low population growth, labour force participation rates are almost unal-

tered on average (although there could exist higher variations by country and by age group). In emerging economies the economically active population has grown, but population growth has been strong as well, leading to only small increases in labour force participation rates (Figures 11-12).

**Figure 11. Trend in economically active population (index 100 = 2006)**



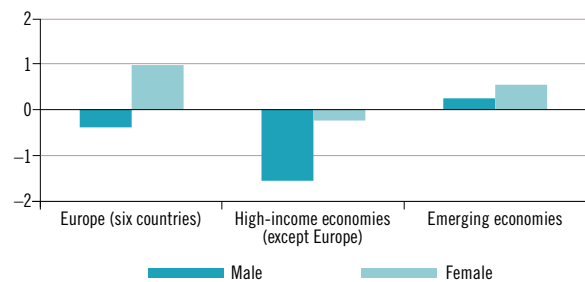
**Figure 12. Trend in labour force participation rate (index 100 = 2006)**



Note: Emerging Economies do not include Argentina.

The crisis has led to a reduction in male labour force participation in all the regions, whereas female labour force participation has increased in Europe and in emerging economies (Figure 13).

**Figure 13. Change in male and female labour force participation rates (2010-2007, in percentage points)**



Note: Emerging economies do not include Argentina.



Employment has declined significantly (by over 4 per cent) in high income economies in agriculture and industry (including construction). Employment in services has risen in emerging economies, possibly including lower quality informal employment. Noteworthy, the share of employment in manufacturing in total employment has fallen significantly across the three country groups (Figures 14-16). See also Annex 1.

Figure 14. Change in employment by sector, 2010 and 2009, (in per cent)

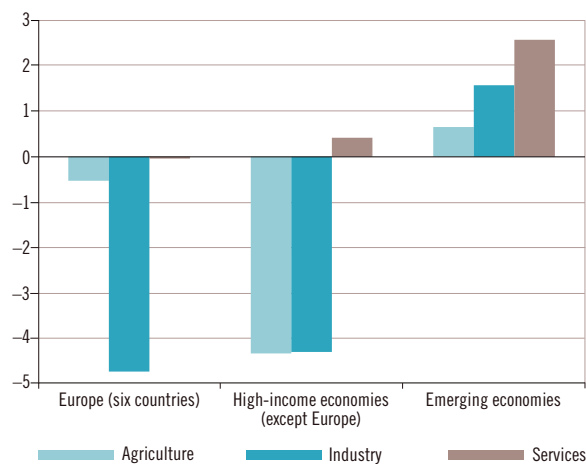


Figure 15. Trend in manufacturing employment (index 100 = 2006)

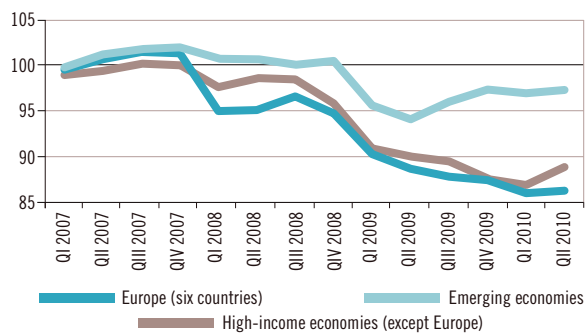
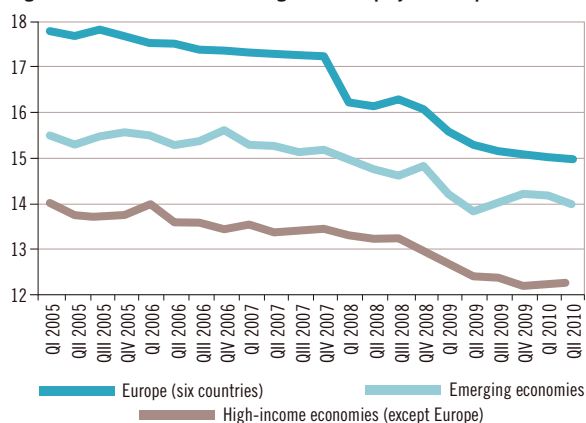
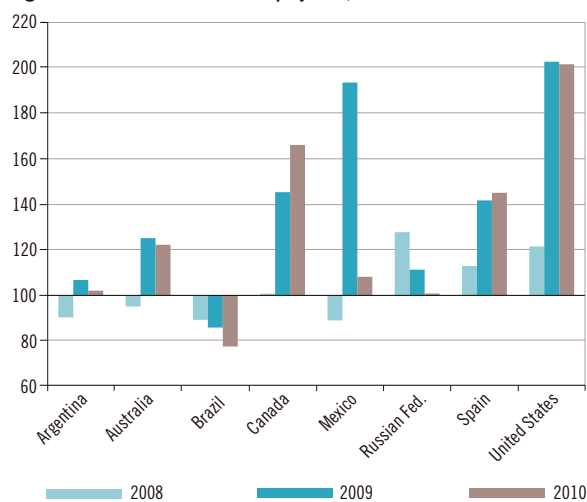


Figure 16. Share of manufacturing in total employment (in per cent)



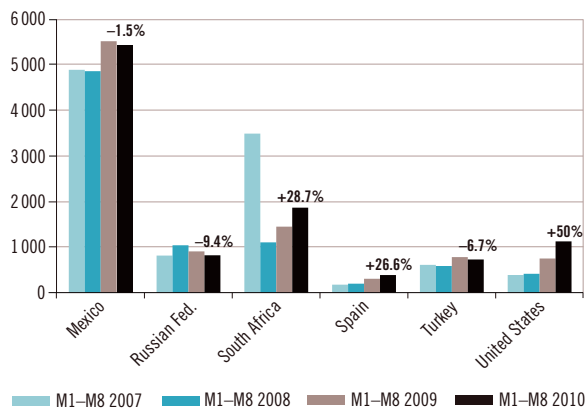
In a sample of 8 countries with available data, time related underemployment has increased significantly between 2008 and 2009, but has stabilized in 2010 (Figure 17). Three countries with available data show a strong increase in the number of discouraged workers (Spain, South Africa and the United States) in a context of high unemployment. This suggests again that the unemployment rate does not reflect the full downturn in the labour market (Figure 18).

Figure 17. Time-related underemployment, (index 100 = 2007)



Definition: Persons in time-related underemployment are those who, during the reference period, were willing to work additional hours, were available to do so, and had worked fewer hours than a selected number of hours.

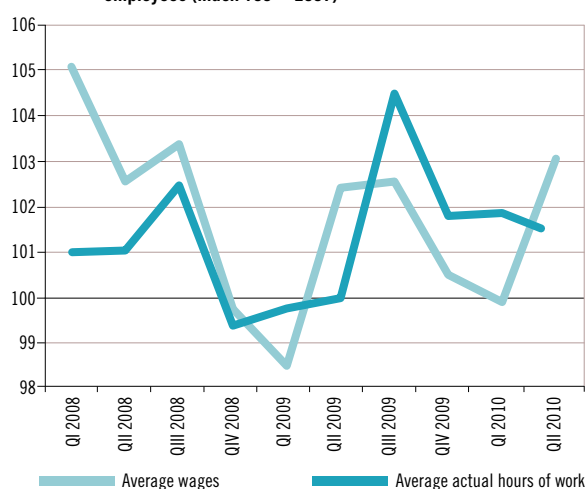
Figure 18. Discouraged workers (in '000 and per cent change)



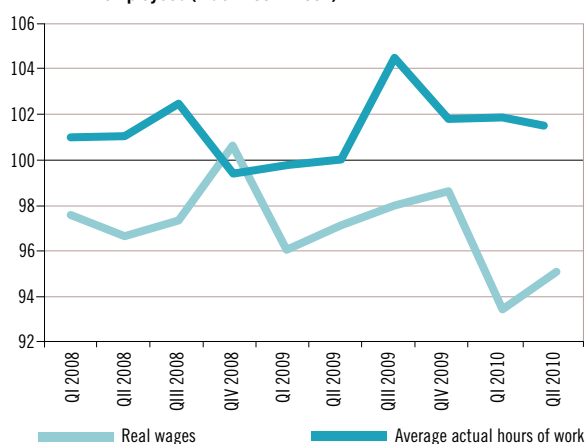
Definition: Discouraged workers constitute one group of inactive work-seekers. These are persons who, while willing and able to engage in a job, are not seeking work or have ceased to seek work because they believe no suitable are available jobs.

Figures 19 and 20 display aggregate indexes of average nominal and real wages and hours worked for manufacturing employees. The index is based on a reduced sample of countries with published up to date data. Real wages have decreased on average by 4 per cent mid 2010 relative to the pre-crisis situation (Figure 20). As of the second quarter 2010 no recovery in real wages is observed. Hours worked declined sharply from mid 2008 to mid 2009, then rebounded and declined again in the second quarter of 2010.

**Figure 19. Average nominal wages and hours worked, manufacturing employees (index 100 = 2007)**



**Figure 20. Average real wages and hours worked, manufacturing employees (index 100 = 2007)**



Note: Wage indexes are constructed using information from the following countries: Australia, Canada, Germany, Japan, Republic of Korea, Russian Federation, South Africa, Spain, United Kingdom and the United States. Hours of work index is constructed using information from Canada, France, Germany, Italy, Japan, Netherlands, Spain, Turkey, United Kingdom and the United States.

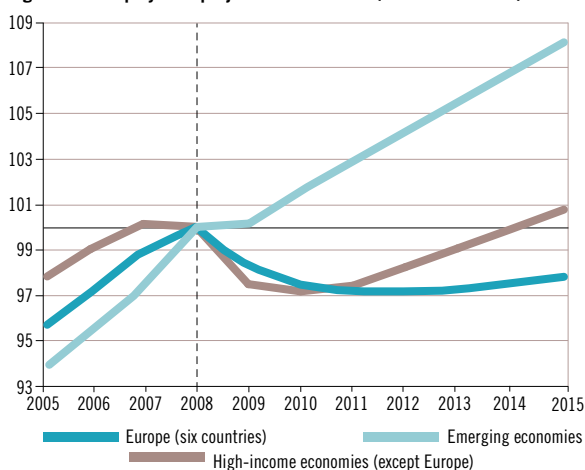
## Section 2: Future employment challenges

### Employment growth projection

To assess the medium-term prospects for employment growth, a univariate ARIMA model of aggregate (by country-group) employment series was estimated and the future trend of the series was projected.

Figure 21 projects the employment index (base 2008=100) for the three country-groups. For higher-income (non-European) economies, return to the pre-crisis employment level is projected to occur, based on past trends and based on past trends and current economic outlook, around 2015. The situation is more critical in Europe, where recovery in employment is not projected to be reached within the medium-term period. On the other hand, the projection for emerging economies shows a continuous increase in employment over the period.

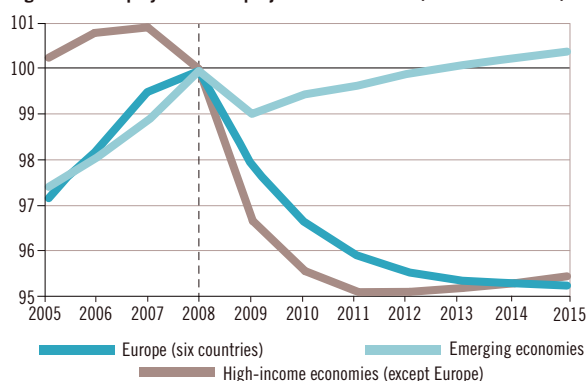
**Figure 21. Employment projection 2011–2015 (index 100 = 2008)**



When taking into account the growth in working age population, the outlook is even more dramatic for high income countries. Figure 22 depicts the projected trend in the employment rate (i.e., total employment over working-age population). Increases in the population imply that recovery in the employment rate is not projected to be reached in the next five years in both groups of high-income economies. In emerging economies, growth in population equalizes growth in total employment (including informal employment), thus the ratio remains relatively constant during the period of analysis<sup>3</sup>.

<sup>3</sup> All the results described above are fully consistent ILO's World of Work Report 2010 analysis based on a more complete modelling taking into account the effect of macroeconomic variables on employment.

Figure 22. Employment ratio projection 2011–2015 (index 100 = 2008)

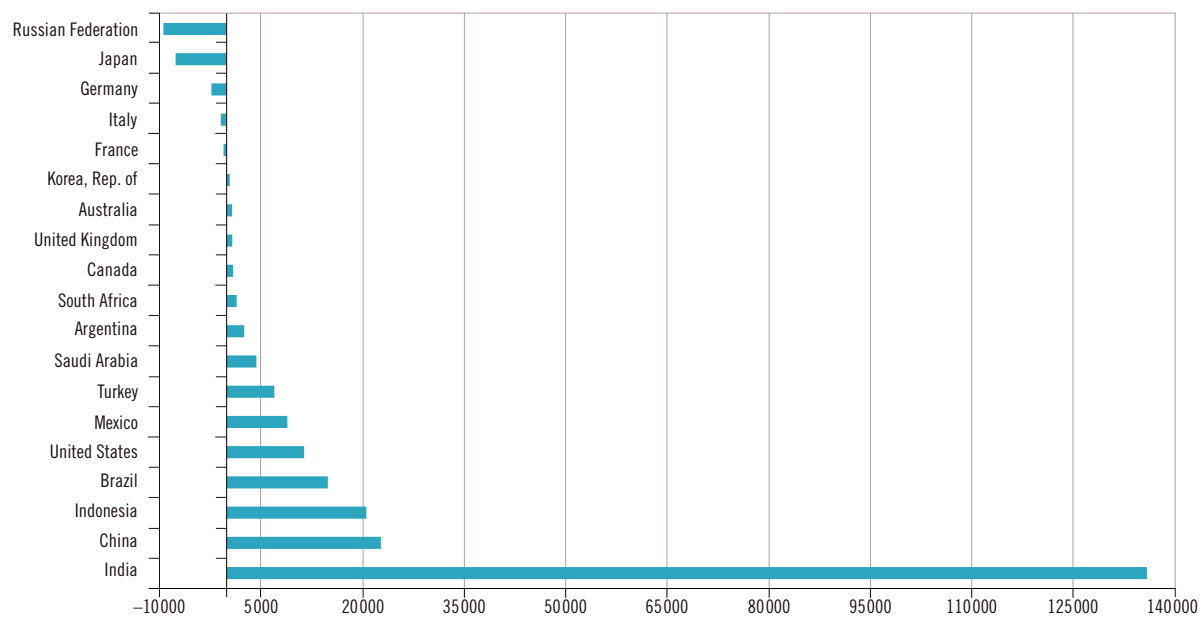


tion, notably Japan and the Russian Federation. These trends have a number of implications. G20 countries will collectively need to generate some 21 million jobs per year, every year to 2020, just to absorb new entrants into the labour market. Balanced growth will increasingly have to rely on domestic demand linked to wages rising along productivity increases and higher employment levels. In most countries, future output growth will depend on an appropriate combination across economic sectors of productivity growth and greater job intensity.

### Future growth in the working age population

Demography is a key variable for future output growth but also for dependency rates and the financing of social security. Between 2010 and 2020 the working age population (15–64 years) among G20 countries will increase by 212 million (Figure 23). Over 64 per cent of the increase will occur in only one country, India. China and Indonesia will see an increase of 23 and 20 million respectively, followed by Brazil and the United States with increases of 15 and 11 million respectively. Six countries will see absolute declines in their popula-

Figure 23. Net increase in working age population (15–64 years), 2020–2010, (in '000s)



Source: ILO Laborsta, Economically Active Population Estimates and Projections, 1980–2020.

**Annex 1. Employment trends by economic activity in selected countries, first and second quarters 2010 over same period 2009<sup>4</sup>**

| Country            | Agriculture | Hotels & Restaurants | Construction | Financial Intermediation | Manufacturing | Mining | Transport | Wholesale retail trade | Real estate and business services | Public administration | Utilities | Education | Health |
|--------------------|-------------|----------------------|--------------|--------------------------|---------------|--------|-----------|------------------------|-----------------------------------|-----------------------|-----------|-----------|--------|
| Australia          | +           | +                    | +            | +                        | -             | +      | +         | -                      | +                                 | +                     | +         | +         | +      |
| Brazil             |             |                      | +            | +                        | +             |        |           | +                      |                                   | +                     | +         | +         | +      |
| Canada             |             | -                    | +            | +                        | +             | +      | -         | -                      |                                   | +                     | -         | +         | +      |
| China              | -           |                      | +            | +                        | -             | +      | +         |                        |                                   | +                     | +         | +         | +      |
| France             | +           | +                    | -            | +                        | -             | +      | -         | +                      | -                                 | -                     | +         | -         | +      |
| Germany            | +           | +                    | -            | -                        | -             | -      | -         | +                      | +                                 | +                     | +         | +         | -      |
| Italy              | -           | +                    | -            | -                        | -             | +      | -         | -                      | -                                 | -                     | +         | -         | +      |
| Japan              | +           | +                    | -            | -                        | -             |        | +         | +                      |                                   | -                     |           | +         | +      |
| Korea, Rep. of     | +           |                      |              |                          | +             |        |           |                        |                                   |                       |           |           |        |
| Mexico             | +           | +                    | +            | +                        | +             |        | +         | +                      |                                   | +                     |           | +         | +      |
| Russian Federation | -           | -                    | -            | +                        | -             | -      | -         | +                      | -                                 | +                     | -         | -         | +      |
| South Africa       | -           |                      | -            | +                        | -             | -      | +         | -                      |                                   |                       | -         |           |        |
| Turkey             | +           |                      | +            |                          | +             | -      | +         |                        |                                   |                       | +         |           |        |
| United Kingdom     | +           | +                    | -            | -                        | -             | -      | -         | -                      | +                                 | -                     | +         | +         | +      |
| United States      |             | -                    | -            | -                        | +             | +      | -         | -                      | -                                 | +                     | -         | +         | +      |

Note: + = increase in employment; - = decrease in employment

Source: National labour force surveys and official estimates, compiled by ILO.

<sup>4</sup> Extracted from E. Zeballos and S. Garry. Jobs Recovery: Sectoral Coverage. A Global Overview of Employment Trends and Working Conditions by Economic Activity. First Semester 2010. Working Paper 279. Sectoral Activities Department. ILO. Geneva, 2010.



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