

The Future of Work Centenary Initiative

Issue Note Series

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International
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The world of work is undergoing major changes that will continue, and potentially intensify, in the future. To better understand and in order to respond effectively to these new challenges, the ILO has launched a “Future of Work initiative” and proposed four “centenary conversations” for debates in the years leading up to its centenary anniversary in 2019: (i) work and society; (ii) decent work for all; (iii) the organization of work and production; and (iv) the governance of work. This Issue Note Series intends to provide an overview of key trends and issues in selected thematic areas of particular relevance to the “conversations” with a view to informing and facilitating dialogue and debates at the national, regional and global levels.

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THE FUTURE OF LABOUR SUPPLY: Demographics, migration, unpaid work*

This note details key demographic dynamics already impacting the Future of Work as well as two significant trends in the labour market – unpaid work and labour migration – that create global policy opportunities in light of those demographic changes.

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1. Introduction

The ongoing debate about the Future of Work often pivots around on the impact of technology. While technological innovation will play a critical role in shaping jobs, we cannot ignore global demographic trends as well as changes in the nature of work that already confront us at global, regional, and national levels. These dynamics have profound implications for the labour market. They will continue to do so, since machines are unlikely to fully replace the labour of human beings any time soon (see the FoW Issue Note No. 1).

Workers make decisions about whether, how, and where to work within a complex environment of labour market policies, employment strategies, social protection systems, societal norms and cultural changes, as well as levels of technological and other development within their communities and countries. Policy decisions we make today set the stage for future job growth, gender and wage inequality, and the ways in which we will need to harness technology.

This issue note is about the people who will shape the future of work. It attempts to capture some of the complexities of the policy arena in which people make decisions about work by focusing on key demographic trends, as well as two of the most significant developments in the world of work today: unpaid work, and migration. Section 2 on labour supply and demographics looks at some of the characteristics of today’s and tomorrow’s workforce and points to policy innovations that are likely to shape future labour market participation. Section 3 relates to labour supply for free: unpaid work and examines the link between unpaid work, labour supply and inequalities, especially gender inequality. Section 4 looks into labour supply on the move: migration, covering numerical, geographical and policy trends in migration and old and new drivers of labour mobility. Section 5 concludes by proposing key issues for debate.

2. Labour supply: Demographical dynamics

Demographical changes continue to be a defining feature of the labour market. They are often complex with considerable variations between countries, but can be grouped around three dimensions: youth, ageing and women.

The number of new entrants into the labour market is increasing in many countries. Currently, close to 40 million people enter the labour market each year. Between now and the year 2030 the world economy needs to create close to 520 million new jobs in order to match the projected increase in the size of the labour force. This is most likely an under-estimation as it does not reflect possible increases in female and older worker labour force participation and migration flows. Considerable heterogeneity exists between regions: in sub-Saharan Africa, for instance, the working-age population as a share of the total population is expected to continue to increase between 2015 and 2040, while it will stagnate in Latin America and decrease in East Asia as well as in advanced economies (ILO, 2016a).

Youth

Youth unemployment is already at much higher levels than average unemployment for the adult populations (ILO, 2015a). Currently, 71 million youth are unemployed and there is a “jobs gap” of about 62 million jobs. In 2015, almost 43 per cent of the global youth labour force was either unemployed or living in poverty despite having a job. The latter is the result of the low quality of jobs available to young people. This dire situation increases the challenges involved in creating jobs for new young entrants into the labour market.

A key response to the continued, sometimes worsening situation for youth has been the improvement of the quality of labour supply through education and training. Indeed, recent decades have witnessed significant improvements in terms of training and educational opportunities for youth, including through new and innovative training methods such as web-based training courses (e.g., Massive Open Online Courses (MOOCs)). Despite these improvements, however, many young people, especially in developing countries, do not have access to education. In 2015, 31 per cent of youth in low-income countries had no educational qualifications at all, compared to 6 per cent in lower middle-income countries and 2 per cent in upper middle-income countries (ILO, 2015a).

At the same time, despite some progressive improvements in their skills, young men and women continue to suffer disproportionately from insufficient job opportunities. This suggests the need for broader and integrated strategies which can boost labour demand. Studies and experience show that such strategies could build on the following principles: (a) articulating macroeconomic policies, labour and employment policies and targeted interventions in a coherent manner; (b) increasing fiscal incentives, supporting the development of infrastructure, and developing enabling regulations for enterprises operating in sectors with high employment potential for youth; (c) ensuring that young people have the right skills and support when searching for employment; and (d) targeting disadvantaged youth through comprehensive packages of active labour market policies to help them in their school-to-work transition.

Ageing

People now live longer and healthier lives and have fewer children. While these demographic changes certainly indicate great progress in human development, they have also led to trends towards ageing in many countries. For the time being, developed economies are hit the most, however it will only take one generation until almost all societies will start ageing. The share of the world's population over 65 is projected to increase from 8 per cent today to nearly 14 per cent by 2040 (Harasty and Schmidt, forthcoming 2016).

This demographic shift poses a range of policy challenges for which there are no easy answers. For example, questions arise as to the role of the social security system in an ageing society.

This question is even more challenging for developing countries, where coverage and benefit levels remain insufficient (ILO, 2013a; see also the FoW Issue Note No.4 on social contract). Partly to address the sustainability of social security in some countries, active ageing (including how to “re-activate” older people for labour markets) has emerged as an important policy tool. While such a strategy has gained wide recognition, it remains difficult to develop policies which are acceptable to all age and professional groups. The perception that “older workers steal from young” persists although evidence to support this view is largely lacking (Harasty and Schmidt, forthcoming 2016).

Women

While there is a common perception that women’s labour market participation has increased in many countries, this is not the reality at the global level. In fact, female participation rates decreased from 52.4 to 49.6 per cent between 1995 and 2015, and gender gaps in the participation rates remain large at around 27 per cent (ILO, 2016c). This is compounded by a relatively high risk of unemployment for women compared to men (6.2 per cent and 5.5 per cent, respectively), particularly for young women. In some regions such as North Africa and the Arab States, young women find the transition from school to work much harder and the female youth unemployment rate is almost double that of young men (ILO, 2016b).

The declining trend in women’s labour force participation reflects in part the voluntary withdrawal of women from labour markets as a result of increasing living standards (i.e., the pattern known as “M curve” in which the female participation rate decreases with higher income and then bounces back once the level of income reaches a certain threshold) as well as the fact that they are spending more time in school. However, the decline is disappointing, particularly given the considerable improvement in the quality of female labour supply. Globally, the rates of educational attainment and gender parity are increasing. Enrolment and completion rates in primary and secondary education are steadily growing and leading to increased participation in post-compulsory education and training, resulting in a more highly educated labour force. In 2009, 73 per cent of 184 countries had reached gender parity at the primary or secondary level or at both levels (UNESCO, 2012). There are also more young women than men in universities in 60 countries and women form the majority of the world’s university graduates (World Bank, 2011).

There are strong reasons to believe that sluggish female participation has much to do with the quality of the jobs offered. It is well documented that women workers end up in lower quality jobs more often than their male counterparts. Women in employment are also overrepresented in a narrow range of sectors and occupations, where low quality jobs, informality, inequality and precariousness prevail (ILO, 2016c). In most developing countries the share of women engaged in self-employment and contributing family labour is higher than that of men. Even when the overall income improves, these workers sometimes decide to withdraw from the labour market rather than move to other jobs unless jobs on offer are sufficiently attractive. In addition, in developed countries with low female participation rates (e.g., Japan, Republic of Korea), greater emphasis is being placed on improving job quality for women.

Another critical factor underlying low female participation is the fact that unpaid work is undertaken predominantly by women as a result of economic, social and cultural constraints. This issue is examined in the next section.

3. Labour supply ‘for free’: Unpaid work

The term “unpaid work” is often used in a loose way, creating some confusion. In 2013, an international statistical standard was adopted which identified a variety of unpaid forms of work which fulfil different functions either for the workers themselves or society as a whole.¹ Among these are: (a) unpaid trainee work; (b) volunteer work; (c) own-use provision of goods (work done to produce goods for consumption by the household or family); and (d) own-use provision of services (work done to provide services to the household or family, including unpaid household and care work).²

Economic value of unpaid work

While “unpaid work” has long been deemed to have “no monetary value”, various measures exist to value this labour. For instance, country-level estimates highlight the economic significance of unpaid household services, beyond their individual and social value. If such services are valued on the basis of their replacement (i.e., market) cost they amounted to 20 to 60 per cent of GDP in 2015 (UNDP, 2015). Similarly, an estimated 971 million people worldwide engage in unpaid, non-compulsory volunteer work.³ On a full-time equivalent basis, this equates to over 125 million workers, with approximately one quarter participating through organizations and the other three quarters volunteering directly (The Johns Hopkins Center for Civil Society Studies, 2011). Tentative estimates as of 2005 place the value of volunteer work at USD 1.348 trillion or 2.4 per cent of the entire global economy (The Johns Hopkins Center for Civil Society Studies, 2016, forthcoming).

Unpaid work as captured in categories (c) and (d) above, has a clear gender dimension, reflecting cultural norms and traditions about women’s unequal share of unpaid household and care work. Perceptions about care responsibilities contribute to pervasive inequality in political, social and economic spheres even in countries where women are relatively more empowered (ILO, 2016). In both high- and lower-income countries, women on average perform at least two and a half times more unpaid household and care work than men, although the gender gap in time spent on unpaid work has narrowed over time in industrialized countries (United Nations, 2015). Using the estimated economic value of unpaid household work, this means that women’s economic contributions to the household are approximately three times those of men.

Hidden costs for women

The gender distribution of unpaid work affects the ability of women to pursue employment and other activities such as education, participation or access to discretionary free time, including rest. Performing unpaid work also bears an opportunity cost and is therefore potentially impoverishing. “Time poverty” in both higher- and lower-income countries particularly affects women and correlates with individual and social well-being and quality of life (UNRISD, 2016 forthcoming). In high-income settings, poor work-family balance has been also identified as a “new social risk” (Esping-Andersen, 2009; Taylor-Gooby, 2004). A 2015 poll of more than 9,500 women in the G20 countries found that work-family balance was the top work-related issue for women, flagged as such by 44 per cent of the respondents. Equal pay and harassment were ranked second and the third respectively (Ipsos MORI, 2015). In a 2015 ILO survey of 1,300 private sector companies in 39 developing countries, the greater burden of family responsibilities borne by women than by men was ranked as the number one barrier to women’s leadership (ILO, 2015a).

Boosting women’s participation in the labour market requires the economic recognition of unpaid work by creating market demand for or public provision of those activities, in particular care-giving. This need has grown in the context of an ageing society. Meeting the care demand is partially organized at the global level through migration flows, a phenomenon which some observers have labelled as “global care chains”. Social reproduction is ensured by relying on female migrants who fill care-related jobs, in particular domestic workers, child-minders, nurses and other occupations in personal care service, in response to care shortages in ageing

¹ Resolution 1, Resolution concerning statistics of work, employment and labour underutilization (Geneva, ILO, 2013).

² As defined in the resolution concerning statistics of work, employment and labour underutilization, “own-use production work” refers to “any activity to produce goods or provide services for own final use”. This includes household accounting and management, preparing and serving meals, cleaning, decorating and maintaining one’s own dwelling, and also childcare, transporting and caring for dependents, including the elderly and other household members.

³ *Ibid*, p.8.

higher-income countries. Women in low-income countries leave their own children with relatives or employ a domestic helper themselves – often another internal or international migrant. The scale of the global care chain is considerable. In 2015, the ILO estimated that of the total of 150.3 million migrant workers, 11.5 million – or 17.2 per cent – were domestic workers (see also Section 4).

How to socially organize unpaid work

Recognizing the social and economic value of unpaid work, especially care work, has led to greater attention on how to provide for it. For instance, improved work-life balance has received increased funding and policy focus through, on the one hand, shifting care work out of the family sphere to public or market institutions (e.g., Sorj, 2013), and, on the other hand, supporting more equal sharing of care responsibilities between women and men. Examples of these policies include better maternity protection for all working women as well as longer and better paid paternity and parental leave schemes, which encourage men to take leave by applying a ‘take it or lose it’ approach instead of allowing it to be fully shared among partners. However, major gaps exist in the provision of adequate and affordable childcare services and long-term and disability care (ILO, 2016c; Scheil-Adlung, 2015). To address this global gap, Sustainable Development Goal 5 (“Achieve gender equality and empower all women and girls”) includes a specific goal: “5.4. Recognize and value unpaid care and domestic work through the provision of public services, infrastructure and social protection policies and the promotion of shared responsibility within the household and the family as nationally appropriate.”

In addition, the provision of basic incomes and services through social protection systems contributes to addressing the balance between pressures to engage in paid employment and the importance of care-giving and other unpaid work. Experiments in the provision of basic incomes have shown both social and economic benefits (Forget, 2011), although in lower-income countries unpaid work has so far failed to become a systematic variable in policy design and implementation. Globally, over 800 million women do not have access to income security in the form of cash transfers around childbirth (ILO, 2014). Women also represent nearly 65 per cent of people above retirement age (varying for most countries from 60 to 65) without entitlements to regular social security benefits. This means that some 200 million women are living without any regular income from an old-age or survivor’s pension, compared to 115 million men (ILO, 2016c).

The expansion of the care economy for the reasons noted above presents both opportunities and challenges for the future of the labour market. In fact, policies to date have failed to simultaneously guarantee care receivers’ and caregivers’ well-being, including decent working conditions for paid care providers (ILO, 2016; UNRISD, forthcoming). Yet the care economy has the potential for future large-scale job creation in both developing and industrialized countries assuming that social protection systems ensure that all people in need can afford care services (ILO, 2015b). For instance, recent estimates show that investment in the care economy of 2 per cent of GDP in just seven high-income countries would create over 21 million jobs. It is also argued that public investment in the care economy would also lead to the creation of comparatively better quality jobs (with social security benefits) (ITUC, 2016).

4. Labour supply ‘on the move’: Migration

Another critical dimension of labour supply is the growth of a global workforce ‘on the move’. Migration decisions are complex, involving demand-pull factors (e.g., attractive job opportunities), supply-push factors (e.g., lack of jobs, natural or political disasters) and combinations of both. Large and diverse networks which comprise everything from moneylenders who provide the funds needed to pay an agent to cross the border, to employers or friends in the destination country who help migrants find jobs and places to live, contribute to migration decisions. The factors that motivate migrants to cross borders rarely have equal weight in individual migration decisions, and the weight of these factors can change over time. Global inequality

between countries in terms of economic and social performances also underlies the current trend towards growing migration.

Increasing and more complex

An estimated 244 million persons in 2015 qualified as international migrants, defined as persons living outside their country of birth for more than 12 months, an increase of 71 million or 41 per cent since 2000 (UN, 2015). This trend has gone hand in hand with an increased feminization of labour migration, as more and more women migrate not as accompanying family members but as workers. According to ILO global estimates, of the 150 million migrant workers in 2015, 44.3 per cent were women (ILO, 2015).

Migration has also reached an unprecedented level of complexity due to the simultaneous process of regionalization and globalization (ILO, 2014; Abel and Sander, 2014) and a blurring of categories. Some 20 years ago, one could relatively easily distinguish between migrant sending and receiving countries as well as transit countries. Today almost every country is an origin, host and transit country at the same time.

With these trends likely to continue in the future, the extent to which migrants' skills are recognized and linked to meaningful employment becomes an important issue. There is increasing emphasis on validation and recognition of skills (including those of migrant workers) and expansion of bilateral and regional mutual recognition arrangements based on learning outcome models. The growth of international qualifications and online credentials is also contributing to new debates on the potential of world reference levels (UNESCO, 2015). Common global standards could make cross-border migration more attractive in the eyes of prospective migrants as they would be less exposed to 'brain waste', i.e., having to work in jobs below their level of qualification.

Shifts in policies

Migration policies have also continued to evolve. One noticeable development with significant implications is the reliance on more temporary labour migration programmes as opposed to permanent immigration (OECD, 2008). The ILO has detected a worldwide "mushrooming" of temporary foreign worker schemes that typically place more stringent and less favourable conditions of admission and stay on less-skilled workers relative to better-skilled workers, and feature strong return control mechanisms, often regardless of actual labour market needs (ILO, 2012).

Temporary foreign worker programmes have potential advantages over programmes of permanent immigration, including meeting acute labour demand without having to bear costs of integrating migrants on a long-term basis; avoiding 'brain drain' (i.e., the permanent loss of highly qualified nationals) in origin countries; and meeting the preference of migrant workers and their families to return to their home countries. These programmes also have the potential to create a class of vulnerable workers who depend entirely on their employer for their regular immigration status.

The views on policies that seek to attract global talent are mixed. The optimistic view stresses its potential of forging closer links between developing and developed countries which would eventually lead to convergence in economic performance and less migration over time. Yet the pessimistic view holds that countries that are already prosperous will win the global quest for talent thereby widening global inequality (Kuptsch and Pang, 2006).

At the other end of the skills spectrum, programmes designed to fill low-skilled jobs lead to concerns about the conditions under which migrant workers work. Such programmes often provide diminished labour rights, which tend to contribute to downward pressures on wages and working conditions in entire sectors. Not all employment protection legislation is applied to temporary migrants (Kuptsch, 2015) and it may be difficult to implement non-discrimination policies. According to international labour standards and in particular ILO's migrant specific

Conventions (No. 97 and No. 143), a migrant worker can claim the right to equal treatment at work in comparison with a worker who is a citizen of the host country. However, this is difficult to operationalize where sectors or occupations become “migrant jobs”, shunned by local populations (ILO, 2014), where asserting rights carries with it high risks of retaliation, and access to remedies is costly. Furthermore, temporary foreign worker programmes may create incentives for both migrant workers and employers to prolong the working relationship beyond the initial agreement and authorization under immigration regulations: migrant workers may not have met their saving targets while employers may wish to benefit more from the training that they have imparted to their foreign employees. Where a move into irregularity takes place, migrants become even more vulnerable to exploitation.

5. Issues for debates

This note has identified key trends in the areas of labour supply, focusing on demographics, unpaid work and migration. The challenges are broad, intense and complex, requiring comprehensive and integrated responses. The note has also stressed that the future of labour supply will not just depend on individual (economic) decisions but also on policies which should build on evidence, common vision, and social dialogue.

In view of these issues, constructive debates are needed on:

- **Activation:** What policies would be needed to ensure an increase of the quality and quantity of jobs available for all those currently inactive? What incentives can be used to increase labour force participation?
- **Ageing:** Ageing societies have special needs in terms of investment and consumption that can be a motor for job creation. What is the job potential in ageing societies? Can the jobs created in ageing societies fill current and future jobs gaps? Would social economy approaches suit ageing society needs better than the existing economic models?
- **Unpaid work and the care economy:** The extent and distribution of unpaid work is a key determinant of labour supply and inequalities in the labour market, especially gender inequality. What kinds of sets of policies are needed to promote both paid and unpaid work in a sustainable and balanced way? How can we ensure that the value of unpaid work is recognized and considered in the development of policies, particularly those that deal with employment? How can these policies be adjusted to reflect cultural and economic realities in different countries? How can different delivery mechanisms (such as care co-operatives, civil society, and volunteering) be used to provide caring services typically delivered through the unpaid work of household members and thereby enable further engagement in paid work? What is the adequate and sustainable policy mix to recognize, reduce, redistribute and give representation to unpaid work and generate well-being for both caregivers and care recipients?
- **Migration:** Globally coordinated policies are urgently needed to avoid making migrant workers a ‘global under-class’. Are we moving even further towards a global segmentation of labour markets along with persistent discriminatory practices against migrant workers? How can we ensure that migrants are seen as individuals with workers’ rights, not as members of an ‘alien’ group?
- **Skills:** The issue of skill development and recognition cuts across the future of labour supply. What policies will ensure that education and training systems continue to improve their capacity to anticipate and respond to skill needs through higher quality and more relevant programmes and institutions? What measures need to be taken with a view to meaningfully recognizing the skills of migrant workers and deploying them where the need is greatest?

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