

flexibility@work 2021

embracing

change.



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# preface.



When we look to the future of work, it is easy to be overwhelmed by the moment we find ourselves in. Although every generation has its share of tests and challenges, the COVID-19 pandemic has certainly led the world in some unexpected directions. Randstad celebrates its 60th year in 2020, so it has been a time of reflection for all of us.

In this year's Flexibility@Work report, technology and business writers Lauren Razavi and Jesse Norton explore the development of work over recent decades and showcase views from the field's thought leaders as they look forward. Their research and insights deliver a comprehensive picture of a more flexible, collaborative and inclusive workforce ahead, and inspire us all to play our part in it.

The past offers important lessons and perspectives to guide the future, and during tough times, we must endeavor to take the long-term view. Looking back, we can see disruption but also continuity of human progress and resilience. We are also steadily improving technology, connectivity and mobility. The world of work offers better opportunities each year, even as it grows less predictable and demands more agility than ever.

The trends of automation, globalization and workforce aging march on as they have for decades. In business and policy alike, leaders remain dedicated to fostering economic growth and harnessing its power to deliver

decent work, fair pay and adequate social security for all.

Agility is often talked about as an essential skill for the future workforce, but the reality is that it has always been important in the labor market. What we see today is people taking advantage of workplace flexibility and making different choices about how, when, where and why they work.

We live in a time of profound technological capabilities and advancement. It is one full of exciting opportunities, but we can only realize the potential if we keep pace. This year's events have sped up the global trend of digitization and the implementation of technologies like artificial intelligence. Worker protections have facilitated a brief period for the labor market to adjust, but looking ahead, we must be realistic about which sectors will bounce back quickly and which will require more time and intervention.

Technology is changing business needs and transforming jobs while creating entirely new categories of work. The infrastructure to accommodate these shifts must be built by a coalition of governments, companies, trade unions and workers themselves. The way we prepare people for the workplace must change, and it is essential to facilitate reskilling as the needs of the labor market shift.

preface.

Collaboration between public and private stakeholders, particularly around data, could help us better understand and predict labor market demand by plotting needs against capabilities. With these insights, we can better prepare for tomorrow's realities and provide workers with access to the best information about their options. Data also makes it possible to match candidates, skills and companies more seamlessly and effectively than ever before, enabling deeper personalization for individual career paths.

But the effect is limited unless workers are ready to embrace change as an opportunity and contribute to shaping the direction of their lifelong employment journey. Individuals must recognize the need to plan for their own future. Organizations can only provide them with opportunities such as training, coaching and other support to enter the labor market. Ultimately, the responsibility to say "yes" lies with each worker.

The global pandemic has overshadowed this year. COVID-19 began as a public health crisis and has mutated into a broader economic crisis. As a bellwether of the labor market, Randstad has witnessed its impact on employment from the front row. It has been encouraging to see how quickly businesses have been able to adapt, particularly in shifting their operations online.

At Randstad, we have spent five years actively investing in digital transformation, which put us in a strong position to face this crisis. We transitioned 38,000 employees across 38 countries to remote work in just three days. However, we know from discussions with our clients that the same was not possible for all, particularly in the hardest-hit sectors, such as events and hospitality.

It is for this reason that Randstad has provided support and expertise to help people return to work safely. Randstad began collaborating with an alliance of leading companies in HR services to shape a vision for this area. Together with Adecco and ManpowerGroup, our focus has been on sharing best practices for health and safety protocols and developing or updating them for on-site jobs.

The HR services industry plays a vital role during turbulent times. If we follow current trends into the future, we can see looming skills gaps that need to be addressed. This means that we, as a sector, will need to

work hard to ensure we continue to connect people with decent jobs and the opportunity to thrive as part of the global economy.

Work itself continues to grow more flexible in format, scope and content. The sudden switch to work-from-home during parts of 2020 has influenced many people's thinking about work-life balance, job satisfaction and physical location. This could continue to change the conversation in the years ahead.

Since we were founded 60 years ago, Randstad has championed new models of work, and we know these models will be critical in the period ahead. Through a focus on training and reskilling, we have an opportunity to future-proof workers and companies alike, increasing their resilience and effectiveness in the face of any challenge. The value of this in response to automation was well understood before the crisis. Now it is a matter of urgency and necessity.

Success going forward relies on our ability to see past this crisis. While the challenges that we face today are significant, our past experience tells us that if we face them head-on, we can turn them into opportunities. By applying the lessons learned, we can capture the momentum we need to not only restart the economy, but uplift the global workforce for good.

Best regards,

Jacques van den Broek

CEO Randstad N.V.

# visions.

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# the world of work is always about people.



## Guy Ryder

Guy Ryder, Director-General, International Labour Organization was first elected in 2012 and started a second term of office in 2017. His vision is for an ILO that anticipates and responds effectively to 21st century realities, reaching the most vulnerable and remaining true to its social justice mandate. He has served the ILO in various capacities, including as Executive Director for labor standards and fundamental principles and rights at work. From 2006-10 he was General Secretary of the International Trade Union Confederation (ITUC), having led the unification of the democratic international trade union movement.

Born in Liverpool (U.K.) in 1956, Guy Ryder studied Social and Political Sciences at the University of Cambridge and Latin American Studies at the University of Liverpool.

## the world of work is always about people.

We know the world of work is changing rapidly and profoundly under the impact of technology, climate change, globalization and demographics. In the 2020s, we have to work out how to navigate those transitions and what it takes to navigate them successfully.

## whatever the challenge, we must let the voices of people be heard.

Whatever the challenge, we must let the voices of people be heard. These are what should guide our approach to the world of work. Let's be frank: this past year, everybody's priority has been the Covid-19 pandemic. It has been defined as a uniquely human crisis, affecting both people's health and people's jobs. The pandemic has been a painful experience for everyone, and it has exposed fragilities and vulnerabilities. It has offered us important lessons for the future. Now, we must begin to act on them.

Governance is vital – anybody who thinks we can dispense with government or keep it as the minimalist regulator of working life should have been disabused of that idea by the pandemic. Policy makes a real difference to people's lives, but it doesn't just come down to the politicians. We also need input and engagement from businesses and organized labor.

The discussion about the future of work must not focus too narrowly on any single issue at the expense of the bigger picture. Of course, we must carefully consider key issues such as technology and the environment, but they are part of a greater societal picture. The answers to these challenges are about the values we want to pursue, globally.

When considering those values, the decent work agenda is an excellent place to start. Having access to a good, decent job is fundamental to how we live, wherever we may be in the world. So, what constitutes a decent job? What does decent work look like?

Firstly, it's the opportunity to have a job that renders a decent income, so the principle of fair employment is the first piece of the puzzle to examine. Secondly, this needs to be in the context of full respect for rights at work. A person has certain fundamental rights in the workplace, and that includes the right to speak their

the world of work is always about people.

## it's tremendously important that people find decent jobs at the beginning of their working lives.

mind, to be listened to and to organize. The third component is social protection. The idea of a basic security level, particularly in the face of shocks, is especially important in the current context. Lastly, there is social dialogue: the interaction between employers and workers – and where it's appropriate, the state – to resolve conflicts.

If you put these four pieces together, you have a working definition of what decent work is and what we must focus on to build a better working world for all. We must look at where we believe the jobs of the future lie and how they can meet our future social needs. That means examining skills, social protection, equality, institutions, rules, mechanisms and laws.

At the International Labour Organization, the principles of equity, inclusion and fairness have guided our efforts since we were founded more than a century ago. They are as relevant to the world today as they have always been. If we want peace and harmony in our societies, we must keep these notions at the forefront of our minds.

With regard to young people, we must think about entry points and opportunities. It's tremendously important that people find decent jobs at the beginning of their working lives. This has a positive impact on their lifelong employment prospects. Of course, working arrangements are becoming more diverse, and we must endeavor to properly understand these non-standard and innovative forms of work. Are they a temporary stepping stone into the labor market or a generic model for tomorrow's work that we should make efforts to organize?

All stakeholders must agree on the key features of a healthy labor market and a decent job. If we can agree on that – and, quite frankly, I have no doubt that we can – then we can determine the necessary safeguards, institutions and arrangements to achieve it. That

discussion is, of course, ongoing and ever-changing, and it's a wonderful, inspiring conversation.

Globalization has become an extraordinary influencer on the conditions in which we work, and it's a shift that will be with us for the long term. The question is how we manage these emerging trends in a globalizing world. That's a significant challenge for all stakeholders to consider. It's not possible to work in nation-state silos on the issues that have emerged. Instead, we must accept and embrace working in an expansive, open and global environment.

Where there are challenges, there are also practical solutions. Our job is to uncover and implement those solutions – and there is a lot to be optimistic about.

### International Labour Organization (ILO)

The ILO was founded in 1919 on the premise that universal, lasting peace can be established only if it is based on social justice. The ILO became the first specialized agency of the UN in 1946.

The ILO brings together governments, employers and workers from 187 member states to set labor standards, and develop policies and programs promoting decent work for all women and men.

Its unique tripartite structure gives an equal voice to workers, employers and governments, ensuring that their views are reflected in its work.

The main aims of the ILO are to promote rights at work, encourage decent employment opportunities, enhance social protection and strengthen dialogue on work-related issues.

[www.ilo.org](http://www.ilo.org)

# from remote work to smart work.



## Stefano Scarpetta

Stefano Scarpetta is Director for Employment, Labour and Social Affairs at the Organisation for Economic Co-operation and Development (OECD) since 2013. As director of ELS, he is responsible for the design and the implementation of the medium-term strategy of the Organisation on labor market and social policy issues as well as international migration and health issues. He represents the OECD in high-level forums and academic conferences; liaises with key senior stakeholders and provides effective communication with the media.

As a member of the Senior Management team of the Organisation, he also contributes to support and advance the strategic orientations of the OECD. Previously, he held several positions in the Economics Department and in his current Directorate. From 2002 to 2006 he also worked at the World Bank, where he took over the responsibility of labor market advisor and lead economist.

He has published extensively in academic journals and edited several books. Mr. Scarpetta holds a Ph.D. in Economics from the Ecole des Hautes Etudes en Science Sociales (EHESS), Département et Laboratoire d'Économie Théorique Appliquée (DELTA) in Paris and a Master of Science in Economics from the London School of Economics and Political Science.

## from remote work to smart work.

Nobody could have predicted that 40% of the OECD workforce was able to move swiftly to telework on a regular basis, not just occasionally. We've seen a massive and rapid adaptation, largely using technology that was already available. It's been remarkably and

my sense of what we are going to see from here is new workplace arrangements and many companies adopting fresh approaches in the way they organize work.

rather unexpectedly effective too. Early research shows that many workers believe they are as productive and some even more productive when working remotely.

Of course, there are many jobs that cannot be performed remotely and this reality must not be forgotten. There are still factories and other types of businesses that require workers to be physically present. But more so than the shocks of the past, the Covid-19 pandemic has granted us an opportunity to test the boundaries and potential of digital technology. What the world has been able to accomplish bodes well for the future, as long as we make sure that everyone benefits.

My sense of what we are going to see from here is new workplace arrangements and many companies adopting fresh approaches in the way they organize work. We have an opportunity to build on the experience of 2020 and move from remote work to smart work. That means not only working from home, but working better and in more effective ways too. We also need to reconsider the purpose of our workplaces, in order to make them even more suitable for the hybrid forms of interactions they will facilitate going forward.

Digital transformation will evolve as new technologies like artificial intelligence and machine learning continue to develop and progress. And I believe we should be optimistic about the opportunities these changes bring. From an aggregate perspective, there is no evidence of



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technology leading to fewer jobs. If anything, there are many more jobs because of it. Before the pandemic, more people were in employment than at any other time since World War II. Digital tools helped us address the huge, unprecedented challenges brought by Covid-19. Only a decade ago, it would not have been possible to keep so many economic and social activities going during lockdowns.

But we have to look beyond the aggregate. Technology has contributed to labor market polarization, with the creation of many more high-skilled jobs and some fairly low-skilled jobs. There has been a significant decline, however, in the availability of intermediate-skilled jobs, which has squeezed the middle.

Digital transformation has prompted rapid and deep changes, and this requires a rethink of our labor market and social policies. Generally, policies have been designed to cope with problems after they have already materialized. For that reason, we have had a tendency to develop coping mechanisms rather than meaningful innovations. The future has to be one in which we focus more on prevention and resilience. We cannot prevent every shock, but we may be able to withstand them in a much more effective way and avoid major economic disruption. Big data has an important role to play in achieving this, because it provides a much more granular sense of who is most at risk when a shock occurs.

We need to invest much more and much better in human capital. This will make a difference for the prospects of individuals and economies. There is an urgent need to adapt the curricula of formal education and enhance the guidance students receive to transition into the labor market. At the same time, given the depth and speed of

the shifts we are experiencing, we need to allow workers to adapt their skills continuously during their working life. At the same time, as people will change jobs, professions or even their status in the labor market more frequently, we need to put into practice what G20 leaders have already been discussing for years: a minimum social protection floor that, to some extent, everybody can access when they are in need.

### Organisation for Economic Co-operation and Development (OECD)

The Organisation for Economic Co-operation and Development (OECD) is an international organization that works to build better policies for better lives. Our goal is to shape policies that foster prosperity, equality, opportunity and well-being for all. We draw on 60 years of experience and insights to better prepare the world of tomorrow.

Together with governments, policy makers and citizens, we work on establishing evidence-based international standards and finding solutions to a range of social, economic and environmental challenges. From improving economic performance and creating jobs to fostering strong education and fighting international tax evasion, we provide a unique forum and knowledge hub for data and analysis, exchange of experiences, best-practice sharing, and advice on public policies and international standard-setting.

[www.oecd.org](http://www.oecd.org)

# commitment and dialogue will bring us together.



## Sharan Burrow

Sharan Burrow is General Secretary of the International Trade Union Confederation, representing 200 million workers in 163 countries and territories with 332 national affiliates.

Previously President of the Australian Council of Trade Unions (ACTU) from 2000–2010, Sharan is a passionate advocate and campaigner for social justice, women's rights, the environment and labor law reforms, and has led union negotiations on major economic reforms and labor rights campaigns in her home country of Australia and globally.

## commitment and dialogue will bring us together.

Our global poll was released just one week before the European lockdowns in the spring, so it's given us an interesting benchmark of insights to work from as we navigate the road ahead. What it shows is that a breakdown of the social contract has been underway for decades. There has been a loss of labor income share and an increase in the insecurity of work, despite growth in terms of wealth and profits.

An updated social contract between workers, government and business is vital for shaping tomorrow's landscape. We need a labor protection floor, sometimes called a universal labor guarantee for all, irrespective of the specifics of the employment relationship. Fundamental rights like freedom of association, collective bargaining rights, and freedom from discrimination with occupational health and safety, minimum living wages and maximum hours of work. Corporate accountability through mandated due diligence is vital and social protection must be guaranteed.

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Of course, this renewed social contract must be rebuilt with a transformative agenda for women's participation and inclusivity of all marginalized workers and have just transitions in terms of both climate and technology at the forefront. People need hope for a secure and prosperous future after a shock. When you ask people what they want, the research shows they want a job. Within that, they also want decent work. That is not yet a reality for all, and it's crucial stakeholders are committed and engaged in dialogue to make it so.

We call this "social dialogue." We want to see everybody committed to building a future that's socially and economically just for workers, business and the environment. Unless those foundations exist with a fundamental respect for the rule of law, then we will fail to deliver what's needed. Businesses must listen to the demands of workers and the design of the regulatory frameworks must support all stakeholders.

This year has accelerated the adoption of digital technologies, especially in relation to remote work for those employees who are able. It's important, though, to realize that 40% of the global workforce are not yet digitally connected, so this is not universal. Nevertheless, the gaps in terms of regulation must be filled.

In a way, what we're seeing is a whole set of demands around the same issues as before: pay condition, hours of work, workers' rights and safety. The difference now is that these are considerations in the home-based work environment, rather than in the physical workplace. When you are isolated at home and away from your

if we're not collectively committed to building a future where everybody has a commitment to the rule of law, to justice, to shared prosperity, to the maintenance of a stable environment – what does that say about us as human beings?

colleagues, of course, the issue of mental health must not be overlooked either. Our regulatory frameworks were ill-prepared for the rapid rise of these new forms of work.

A series of crises has led to an approach where the world of work with related businesses has been characterized as winners and losers. We must replace this with a better understanding of the human and climate impact and consequences of decisions. If we're not collectively committed to building a future where everybody has a commitment to the rule of law, to justice, to shared prosperity, to the maintenance of a stable environment – what does that say about us as human beings?

If we want a better world for future generations, to see long-term recovery and resilience that benefits everyone, we must commit ourselves to that goal now.

#### International Trade Union Confederation (ITUC)

The ITUC's primary mission is the promotion and defense of workers' rights and interests, through international cooperation between trade unions, global campaigning and advocacy within the major global institutions.

Its main areas of activity include: trade union and human rights; economy, society and the workplace; equality and non-discrimination; and international solidarity.

The ITUC is governed by four-yearly world congresses, a General Council and an Executive Bureau.

The ITUC has close relations with the Global Union Federations and the Trade Union Advisory Committee to the OECD (TUAC). It works closely with the International Labour Organisation and several other UN specialized agencies.

[www.ituc-csi.org](http://www.ituc-csi.org)

# adaptability is key for future skills.



## David Hoey

With a passion for skilled careers, David immediately recognized the potential WorldSkills had to make a huge impact around the world. Working in partnership with the board of directors, members, global partners and the international skills community, he has actively led the growth and vision of the organization for over 15 years.

David has a Bachelor's Degree in Engineering (Mech), Certificate IV in Training and Assessment and a Masters of Business Administration. He is a Graduate Member of the Australian Institute of Company Directors. His previous work includes roles as a Project/Systems Engineer, Training Consultant, National Training Manager, National Manager and owner of a consulting business prior to joining WorldSkills International.

## adaptability is key for future skills.

We used to talk about learning for a lifetime; now we have a lifetime of learning. Learning always has to move with the technology. One of the biggest challenges today is that parents are still the most influential people over a young person's career. Sadly, they're often the most ill-informed too. They understand the workforce as it was 15 or 20 years ago, which creates a disconnect. To improve this, we need to create mechanisms that keep young people informed more directly about the workforce as it exists today and what the job opportunities look like. Showcasing and promoting current and future career opportunities in the skills, trades and technologies is a big part of our work at WorldSkills International.

Adaptability is critical for the workforce, which is why there is such a big emphasis on transferable skills. The way to think about success in this area is that you're not so much trying to get people to do a particular job, but instead trying to get them to understand a particular application of their skills. That application can then be

adaptability is critical for the workforce, which is why there is such a big emphasis on transferable skills.

applied across many different sectors. The future will belong to those who can utilize technology as a friend. It changes the nature of jobs and the way people apply their skills, but robots are not going to steal our jobs in the way people sometimes worry about.

Ultimately, technology brings opportunities for people to do new and important work, because machines are able to take over the more repetitive tasks. Whether it's a virus or a 3D printer, labor market disruptions always come and go. You won't be doing the same job at age 20 as you will at 55. The key is to make sure you have an adaptable set of skills. People need to be taught how to learn as opposed to exactly what to learn.

But who is responsible for making that vision a reality? Is it the government's job? Or the private sector's? Or perhaps it comes down to the individual. The government, education providers and industry all have a role to play, but they are not equal roles. They all contribute differently and at different times. Sometimes the resource will be funding, while other times it will be enabling. Every country approaches the challenge differently, but ultimately they have the same goal: to get people workforce-ready, and then producing competitive products and driving up performance. The same qualities of resilience, adaptability and flexibility are what put workers ahead, whatever their age or profession.

Much of the education we see today is competency-based, but the bigger challenge is moving from competence to excellence. Companies prefer to employ people who are excellent. This is what can give them a competitive advantage in terms of their products and services. So how do you inspire workers, especially

adaptability is key for future skills.

much of the education we see today is competency-based, but the bigger challenge is moving from competence to excellence.

young people, not just to do what's necessary to get a job, but instead to aspire to true excellence?

Once upon a time, you went into a company at age 16 and came out at age 60 with a gold watch. People are no longer loyal in the way they once were. This poses challenges for business, but it's an area worth examining because skilled talent will be a key differentiator for companies in the years ahead. They must first attract it, and secondly keep it, which means developing, fostering, nurturing, growing and creating opportunities.

### WorldSkills

WorldSkills is the global hub of skills excellence, which promotes vocational education and training for young people in over 80 member countries and regions. Its mission is to raise the profile and recognition of skilled people, and show how important skills are in achieving economic growth and personal success.

Every two years WorldSkills hosts the WorldSkills Competition, the world championship of skills, and we passionately believe that skills change lives. Formed in 1950, our members promote skills to two-thirds of the world's population.

[www.worldskills.org](http://www.worldskills.org)

# embracing change.

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# summary.

When Frits Goldschmeding founded Randstad, he could not have imagined how incredibly different the world of work would become 60 years later. Frits conducted business on a bicycle and with stamped envelopes — a far cry from the digital infrastructure we operate under today. Good talent, however, remains as challenging to find now as it was then. And workers still desire the same thing from employers: decent pay for a hard day's work.

While some constants remain, changes have come and gone quickly. Transformation of the workforce and workplace occurred over just one or two generations. These evolutions saw the rise of urban centers that drew the best talent and became creative hubs. Along with the congregation of office workers, the design of workplaces evolved, too — from cubicles to open-plan layouts to private offices to co-working spaces. We are now seeing another change in work environment: from office buildings to home offices, and not only due to the COVID-19 pandemic. We are beginning to question the idea of having company workplaces altogether.

In 1960, we lived in a world of nations, empires and dwindling colonial powers. Now, it is perhaps more accurate to think of the world as a vast, connected network of interdependent cities and regions. Boundaries still exist, but technology is helping to bridge the gap between communities. Fewer people live in the countryside, and economic growth and opportunities are concentrated in the world's major urban hubs.



The tools we use at work have also changed. Sixty years ago, computers were tucked away in military bunkers and on university campuses, and few people could divine their mysteries. Since then, digital technologies and the internet that connects them have profoundly impacted the way we collaborate.

Different skills are required to navigate this new, more interconnected world. This has led to rising demand for talent with science, technology, engineering and mathematics (STEM) qualifications. Although there has been a concerted effort from businesses, academia and governments, the labor market so far has been unable to meet demand. A persistent digital skills gap continues to hinder our ability to optimize many new technologies.

summary.



as technologies make some roles obsolete, they also create fresh demand for others, many of them more desirable than those they replace.

### technology shifts labor demands

Many of the jobs that were common in the past no longer exist. For the Gen Z workers entering the labor market, the idea of a telephone operator is as alien as a town crier announcing the day's news on the streets. Automation has had a dramatic impact on the types of opportunities available in the job market.

When Randstad first started in 1960, the role of software developer was decades away from being advertised. Now, it is one of the most sought-after positions in the global labor market. Social media marketers, drone operators and space lawyers are just some of the other fantastic careers that have emerged in recent years.

Alongside these new roles, fears have grown that robots will steal our jobs. While it is true that some blue- and white-collar jobs are disappearing due to automation and artificial intelligence, this is not a complete picture of the world of work. As technologies make some roles obsolete, they also create fresh demand for others, many of them better than those they replace.

New jobs are emerging so quickly that many children in school today will likely work in roles that don't yet exist. It is difficult to anticipate the skills they will need, but there is a clear trend toward greater demand for soft skills such as creativity, emotional intelligence and negotiation. As machines take over traditional roles, they create space for careers requiring unique human skills.



### a dynamic world of work

In addition to taking on different types of work, we are working a little less than before. The average number of hours worked annually has declined across OECD nations. Businesses require more flexibility in their workforce, and employees' approach to work-life balance has shifted.

It is unclear whether the decline in hours worked is associated with a graying global population, but demographics are certainly changing. We are all a little older now, too. The average age across OECD nations has gradually risen, with profound implications for global workforce sustainability. For some markets, opening their borders to more immigrants will be inevitable since over the next several decades they will face a significant shortfall in talent.

While incredible progress has been made, there is still much to do before a truly diverse and inclusive global



## there is a clear trend toward greater demand for soft skills such as creativity, emotional intelligence and negotiation.

workforce is a reality and decent jobs are available to all. In some regions, girls will not have access to the same job and earning opportunities as their male counterparts within their lifetimes. There remain barriers to prosperity for international migrants too, whose numbers are growing, and discrimination based on ethnicity is sadly still prevalent. To ensure a sustainable workforce for the long term, we must increase our efforts to end these inequalities. The good news is that in 2020, the cry for social and economic justice grew louder around the world, resulting in some gains toward parity.

In fact, the world continues to make gains for workers everywhere. Even though the pandemic has restricted physical movement temporarily, the broad adoption of work-from-home arrangements provides opportunities to people who previously wouldn't have been able to access jobs due to geographic barriers. Furthermore, governments, the private sector and other stakeholders are providing more resources to help reskill and upskill millions of workers, while passing legislation to protect the growing class of independent contractors and freelancers. Educational institutions are also expanding their programs to help the next generation of workers better prepare for the disruption of digital transformation. Still, an enormous mismatch exists between where skills are needed and where people possess them on a global scale.



We are not in the business of speculating about the future, but we like to think we've learned a thing or two about the job market over the years. Looking back, we realize that the year we were founded was an inflection point. We suspect the same will be said of 2020. COVID-19 has caused more disruption to global productivity than any geopolitical conflict or financial crisis in living memory.

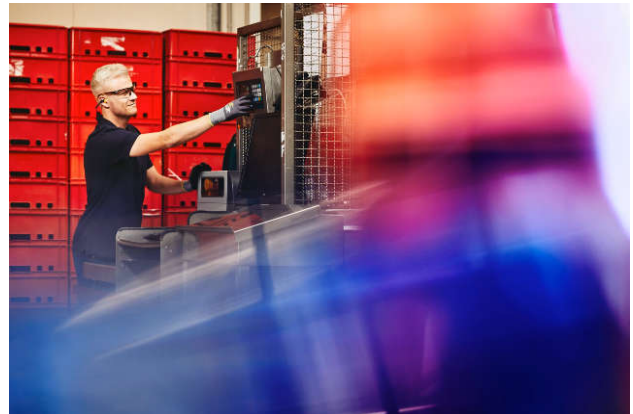
But no matter the scale and complexity of challenges humanity faces, there is a common thread: people have a remarkable resilience and capacity to make the most of opportunities. Our experience of the past six decades gives us every reason to be optimistic for the years ahead, whatever new challenges may come our way.



The way we work has changed dramatically in just a few generations. If a young adult from the year 1960 visited us here in 2020, they would probably find it difficult to make sense of the modern workplace. It is easy for us to underestimate how profound the change has been when it is happening little by little each day.

New attitudes to work give rise to new forms of work in many labor markets. These new forms of work do not so much replace traditional full-time, open-ended contracts, but rather provide a pathway for the formerly inactive or informal labor force to find a decent job. Indeed, new work forms within the gig economy offer flexible and adaptable models to workers, such as working remotely, flexible hours, and a diversity of compensation arrangements and contracts. This has allowed people who never fitted into the traditional 40-hour, nine-to-five workweek format to enter the formal workforce.

While the traditional, open-ended labor contract remains the dominant way of working in the Western world, fixed-term, part-time and on-demand contracts, agency work, and remote work are increasingly common. Work has become more varied and less rigid. This is driven by a mix of new technology and increased connectivity, as well as a broader cultural shift.



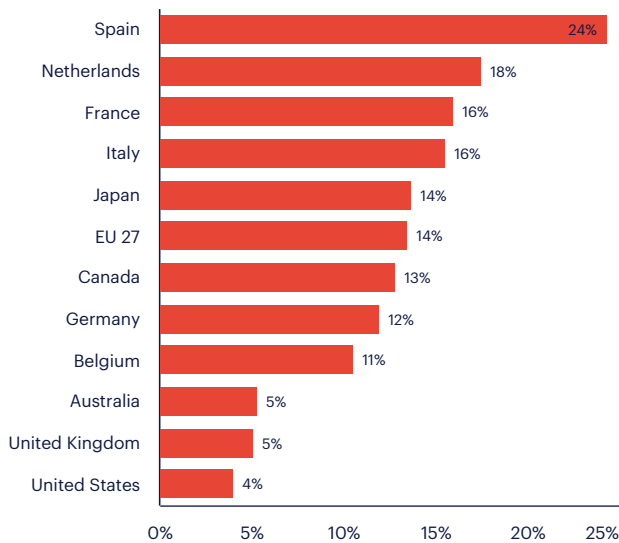
### workplace flexibility

Temporary work has been a significant contributor to economic growth across many nations. In most high-income countries, between 5% and 25% of all workers have fixed-term contracts. These formal contracts offer advantages to the employer and the worker, often facilitating employment relationships that wouldn't necessarily have been possible otherwise.

# flexible labor relations like agency work and fixed-term contracts enable companies to quickly adjust their workforce's size and composition according to needs, processes and priorities.

## temporary employment

share of temporary employment in total dependent employment of workers, age 15 to 64, in 2020q3 (Australia, Canada, US 2017, Japan 2013)



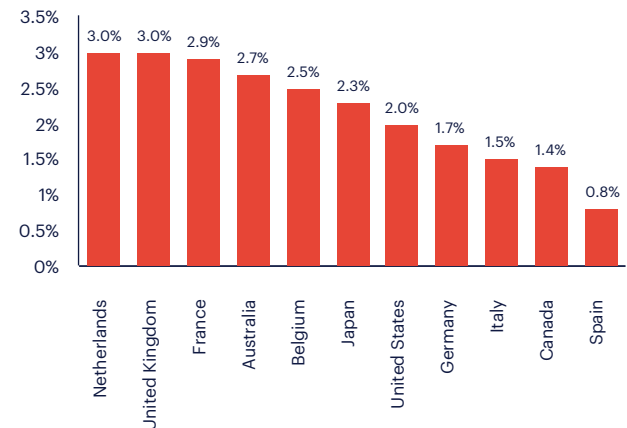
Source: Eurostat, OECD.stats

Flexible labor relations like agency work and fixed-term contracts enable companies to quickly adjust their workforce's size and composition according to needs, processes and priorities. Such relations also allow businesses to screen for the right skills, abilities and qualities before making permanent hires. This kind of candidate matching optimizes the quality and efficiency of a firm's workforce, increasing the likelihood that an employee will stay with a company for the long haul. In particular, an initial work experience period may

facilitate effective job matching for people, helping them progress further and faster in the workforce.<sup>1</sup>

## agency work

share of total employment, age 15 to 64, 2019



Source: World Employment Confederation

The self-employment category includes both own-account workers and business owners, who may or may not employ others. About half of all flexible labor relations consist of self-employment, though it has seen a decline across most OECD countries.<sup>2</sup> In Norway, for instance, a quarter of the workforce were self-employed in 1960, but now only 6% work for themselves.<sup>3</sup> This is primarily due to shifts in the agricultural sector, where self-employed farmers have become less common since the turn of the century.<sup>4</sup>

<sup>1</sup> Randstad (2013) Flexibility@Work 2013: Yearly Report on Flexible Labor and Employment

<sup>2</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda

<sup>3</sup> OECD Data (2020) Self-Employment Rate (indicator)

<sup>4</sup> Randstad (2015) Flexibility@Work 2015: Self-Employment Across Countries in the Great Recession of 2008-2014

redefining work.

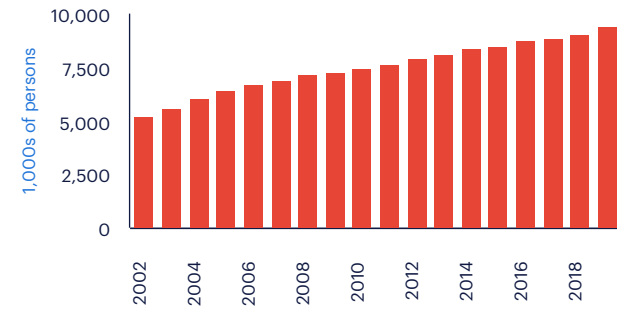
The highest shares of self-employment are found in southern and eastern European countries, where agricultural and small retail businesses remain most prominent.<sup>5</sup> Nations with the largest share of employment in these industries have a high rate of self-employment.<sup>6</sup>

This broadly stable picture of self-employment hides considerable variation between countries, sectors and education levels. For example, self-employment has actually declined in southern and eastern Europe over the past decade, while it has been rising in France, the U.K. and especially the Netherlands.<sup>7</sup>

There are broader signs that a new generation of entrepreneurs is beginning to flourish in some high-income countries. Europe has seen an incremental increase in people aged between 20 and 29 working for themselves, particularly among the highly educated.<sup>8</sup> In part, this may be thanks to the emergence of digital work platforms and decreased bureaucracy around starting a business.

self-employment growing among highly educated

independent workers, age 15 to 64, with tertiary education in the EU 27



Source: Eurostat

But yesterday’s thinking is not always suitable for tomorrow’s workplace. We will need to reform our systems to adapt to this new work-life reality and provide workers with the security they need to successfully manage their careers. As the formats of work develop and shift, there is a need for social innovation to support and protect workers in new ways.

new attitudes to work give rise to new forms of work in many labor markets.



digital platforms

Following the 2008 global financial crisis, digital innovation gave rise to disruptive work platforms such as Uber, Deliveroo and TaskRabbit. This provided new, flexible opportunities for millions when economic circumstances meant many needed extra income. Even though such platforms are still a small share of the labor market, interest in them has risen sharply: between May 2016 and January 2019, the number of job postings increased by about 30% worldwide, with growth driven primarily by developed nations.<sup>9</sup>

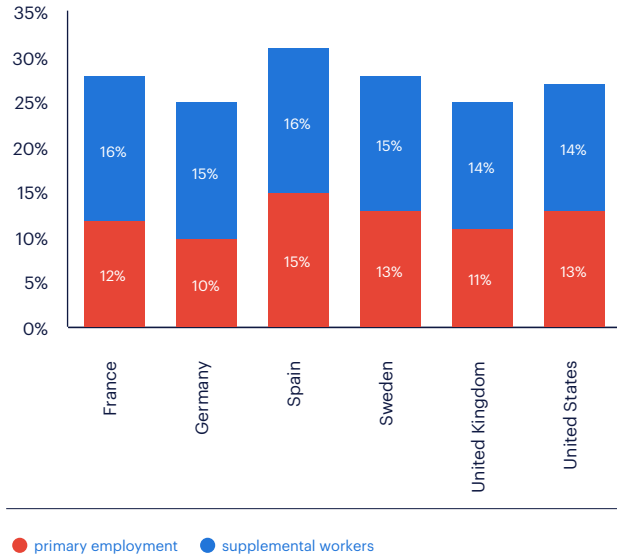
The platform economy has emerged at a time when people are looking for more direct control over their income, in particular extra income. McKinsey estimates that between 20% and 30% of the workforce across Europe and the U.S. earn income from some form of independent work rather than in a conventional payroll job alone.<sup>10</sup>

<sup>5</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda  
<sup>6</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda  
<sup>7</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda  
<sup>8</sup> OECD Data (2020) Self-Employment Rate (indicator)  
<sup>9</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda  
<sup>10</sup> McKinsey Global Institute (2016) Independent Work, Necessity, and the Gig Economy

redefining work.

### independent workers for primary and supplementary income

independent work as a share of total working-age population

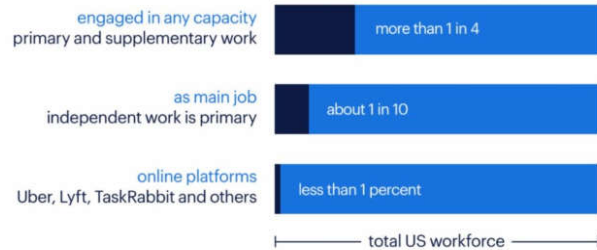


Source: McKinsey Global Institute (2016) Independent Work, Necessity, and the Gig Economy

The independent worker category is diverse and includes sole-shareholder lawyers in private practices, home cleaners employed by multiple clients, retirees letting out second homes and students who run bike errands. Digital platforms have played a part in facilitating this trend, but app-based gig economy workers are still only a small portion of all independent workers. A 2017 U.S. Bureau of Labor Statistics survey suggested that just 1% of American jobs are mediated by digital platforms, while European Commission data from 2018 estimates that this type of work is the main income source for around 2% of adults across the EU member states.<sup>11</sup> There are signs it is growing and that this may be having a positive effect on the labor market more broadly.<sup>12</sup>

## new employment opportunities are boosting productivity in the economy.

how many workers are employed as independent workers?



Source: ILR School & Aspen Institute.

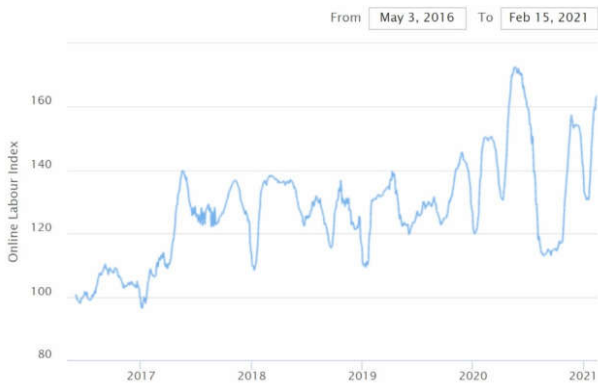
Studies suggest that the growth of independent work is increasing labor-force participation, creating new employment opportunities and boosting productivity in the economy.<sup>13</sup> These benefits are scaling as digital platforms enable faster job matches, broader reach and more effective coordination for gig workers. However, policymakers are concerned about how platforms define a worker's status and where the relationships fit into existing labor regulations.<sup>14</sup>

<sup>11</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda  
<sup>12</sup> OECD (2019) Employment Outlook 2019: The Future of Work  
<sup>13</sup> McKinsey Global Institute (2016) Independent Work, Necessity, and the Gig Economy  
<sup>14</sup> OECD (2019) Employment Outlook 2019: The Future of Work

redefining work.

**growth of online work**

july 2016 = 100.



Source: <http://ilabour.oii.ox.ac.uk/online-labour-index/>.

Digital technologies enable workers and companies to interact in new ways and challenge conventional thinking about jobs. The first gig economy platforms are a decade old now, but it is clear that the broader trend of digital transformation is only just beginning.



**remote work**

It’s been a milestone year for remote work, but the idea is nothing new. The man known as “the father of remote work,” at least as we understand it, is the NASA engineer Jack Nilles. He worked from home for many years and proposed the widespread adoption of remote work to conserve petroleum resources and reduce urban congestion during the American oil crisis of the 1970s. This was, of course, long before people had laptops and smartphones.

Since then, more companies have experimented with working outside the office. For example, IBM installed “remote terminals” in employees’ homes for the first time in the early 1980s. The company’s remote work program flourished, with 40% of its 386,000 global employees working from home by 2009.<sup>15</sup> As more people bought personal computers and could access the internet, remote work became easier and more productive. The expansion of internet services and public WiFi provided opportunities to work away from the home office, too — at co-working spaces, hotel lobbies, coffee shops and elsewhere.

Digital technologies continue to enable people to connect and work in smarter ways, and the COVID-19 pandemic has finally prompted the widespread adoption of remote work. The International Labour Organization reports that 81% of the global workforce was under full or partial lockdown in April 2020.<sup>16</sup> Remote work may once have been understood as a perk, but many people’s perceptions have shifted after this experience.



**key insights**

- Our workplaces have been transformed over the past 60 years, primarily through new forms of flexibility – for organizations and workers alike.
- Two intersecting forces have driven the shift: fresh requirements from businesses and cultural change in high-income countries.
- Technology facilitates incredible new possibilities at work, but it also brings fresh challenges. Social innovation must keep pace.

<sup>15</sup> IBM: “When Working Outside the Box: A Study of the Growing Momentum in Telework” (2009)

<sup>16</sup> International Labour Organization (2020) ILO Monitor: COVID-19 and the world of work. Third edition

# skills

## in the age of

# automation.

New tools have always been a catalyst for different ways of working, but the rate of this innovation accelerated in the late 20th century. The smartphones in our pockets are more powerful than the computers that sent Neil Armstrong to the moon, and we can use Google to access more information than is stored in all of the world's libraries.

Many people say we are living through the Fourth Industrial Revolution, but the dramatic changes that have occurred in our lifetimes could equally be understood as a labor market revolution. Innovation has profoundly altered the skills we require, the way we work and where we choose to live. It has also unlocked enormous wealth, opportunity and access to education all over the world.



### urban migration

Cities have become the primary drivers of job creation in the global economy, which has prompted a migration away from rural areas. Urban centers have become much denser and extended beyond their original boundaries. Only a minority of the worldwide population lives outside them.<sup>17</sup> Cities have become high-tech clusters where vibrant business ecosystems create jobs and improve living standards.<sup>18</sup> Residents enjoy higher incomes, better employment and greater education levels than their rural counterparts.<sup>19</sup>

<sup>17</sup> United Nations (2018) World Urbanization Prospects: The 2018 Revision

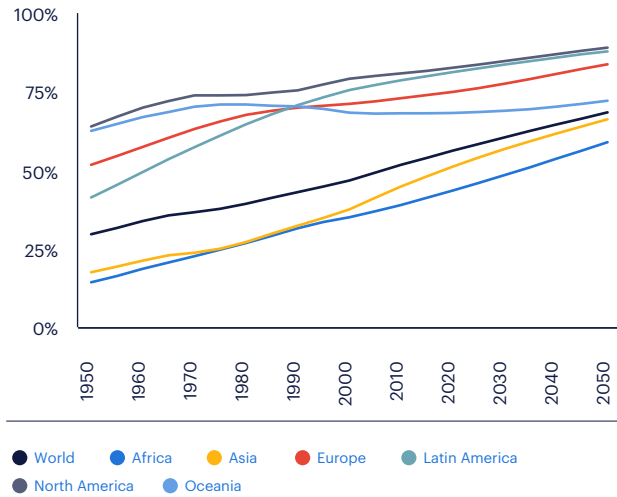
<sup>18</sup> Randstad (2018) Flexibility@Work 2018: Sustainable Growth in the Age of Cities

<sup>19</sup> OECD (2020) Cities in the World: A New Perspective on Urbanisation

skills in the age of automation.

**in 2050 two-thirds of the global population will live in cities**

urban population as share of total population



Source: United Nations (2018) World Urbanization Prospects: The 2018 Revision

That is not to say rural education is in decline. Improvements in educational attainment across rural areas have also prompted migration from the countryside to cities. Agricultural innovation has dramatically reduced the demand for rural labor, and workers have relocated to cities in search of manufacturing or service sector jobs instead.<sup>20</sup> As rural internet connectivity improves and remote working becomes more common, though, employment is becoming less dependent on physical location. This could even prompt movement from urban back to rural areas, or from large cities to smaller ones, as individuals make different lifestyle choices.

Education levels are rising worldwide, and the availability of highly skilled knowledge jobs has increased, but there has been a decline in mid-skill positions such as assembly line workers, data processors, foremen and supervisors.<sup>21</sup> As manufacturing was offshored away from high-income nations, new workforces entered the global value chain. The rise of emerging markets has nearly doubled the world’s labor supply since the 1990s. A combination of automation and relocation has polarized opportunities toward high-skill or low-skill positions.<sup>22</sup>



**drivers of change**

In 1950, almost 250,000 women worked as telephone operators in the U.S.<sup>23</sup> The technology to automatically switch and route calls had already existed for decades at that time, but telephone companies found that customers preferred human operators. Then the volume of calls began to increase exponentially.

As telephone operators handled more calls, they required higher wages, and automation was inevitable. Throughout the 1950s and 1960s, electronic switchboards were rolled out across the country. Today, the U.S. employs just 790 telephone operators,<sup>24</sup> and the number of calls they are responsible for is many times larger than their earlier counterparts. The skills necessary to thrive in the role of telephone operator, of course, are different now too.



<sup>20</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda

<sup>21</sup> OECD (2020) Employment Outlook 2020: Worker Security and the COVID-19 Crisis

<sup>22</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda

<sup>23</sup> United States Department of Labor Women’s Bureau (1963) Women Telephone Workers and Changing Technology

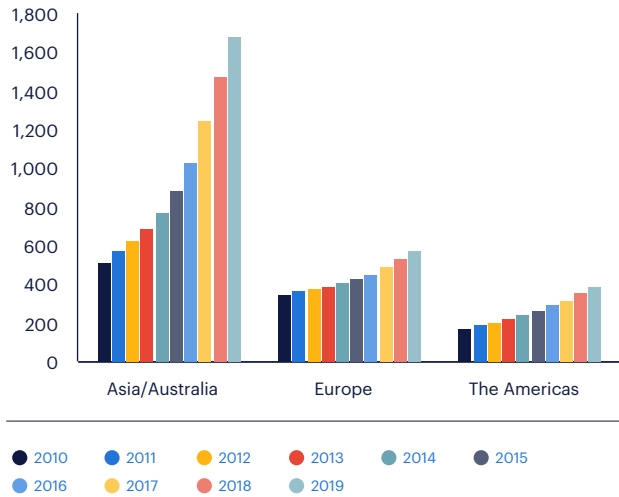
<sup>24</sup> United States Bureau of Labor Statistics (2020) May 2019 National Industry-Specific Occupational Employment and Wage Estimates: NAICS 517000 – Telecommunications



skills in the age of automation.

growing use of industrial robots

operational stock of industrial robots in 1,000s



source: ifr.org

more than 25% of american jobs face automation this decade, including roles in key employment sectors like food preparation, office administration and transportation.

Nearly every industry has its version of this story, and as business needs shift, it is often difficult to predict how jobs will be replaced until it happens. Across all countries and industries, the most common jobs are disappearing or transforming.<sup>25</sup> More than 25% of American jobs face automation this decade, including roles in key employment sectors like food preparation, office administration and transportation.<sup>26</sup> It must not be forgotten, however, that upcoming technologies like AI, robotics and electric vehicles also create jobs, opportunities and increased prosperity for all.

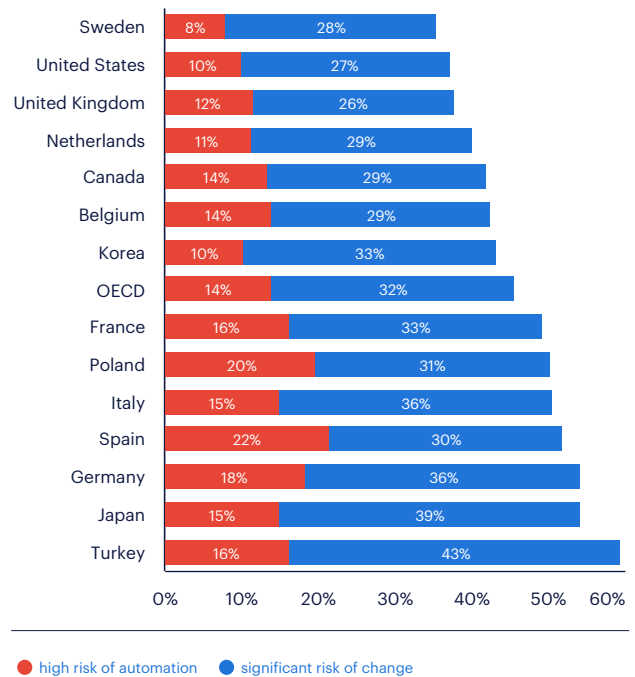
Jobs in the future will not be the same as those of today. Despite an increase in total employment, on average 1 in 7 individual workers will be faced with job loss as a direct result of automation. The changing nature of jobs has been an enduring feature of past waves of technological progress and will ultimately lead to the emergence of three new work types: frontier work, wealth work and last-mile work. Frontier work concerns jobs in new technological fields, wealth work concerns jobs created thanks to increased productivity, and last-mile work concerns jobs that cannot yet be automated.

<sup>27</sup>

Looking even further ahead, the OECD estimates that 65% of the children currently at nursery school will end

jobs at risk of automation

share of jobs at high risk of automation or significant risk of change



Source: OECD Employment Outlook 2019

up doing a job that does not yet exist, such as “vertical urban gardener” or “drone controller.” The World Economic Forum predicts that 133 million new roles will emerge by 2022, resulting from a new division of labor

<sup>25</sup> World Economic Forum (2018) The Future of Jobs 2018 Report

<sup>26</sup> Brookings Institute (2019): Automation and Artificial Intelligence: How machines are affecting people and places

<sup>27</sup> Randstad (2019) Flexibility@Work 2019: Future of Work An Agenda

# policymakers, businesses and workers must collaborate to support the skills and competencies needed for tomorrow's jobs.

between people, computers and algorithms.<sup>28</sup> Many of these emerging jobs will be higher paid and less repetitive than those they replace, but workers will need a new set of skills to perform them.



## future skills

These new jobs will require new and different skills. While the rising demand for hard STEM skills and basic digital skills is well known, there is also ample evidence of a rise in the demand for soft skills. Crucially, we will need to prepare our educational systems for these 21st-century jobs. In addition, we will need to create seamless public-private partnerships – connecting the world of work with that of education – enabling lifelong

learning opportunities to support workers in their careers and to help them transition securely to new jobs.

Policymakers, businesses and workers must collaborate to support the skills and competencies needed for tomorrow's jobs. Widespread reskilling efforts were already underway before COVID-19, but the crisis made them all the more urgent. It was already estimated that more than half of all workers worldwide would require significant reskilling in the 2020s.<sup>29</sup> Physical distancing has created fresh incentives for automation and accelerated the reskilling trend.

Since those who would benefit the most from assistance are often the most difficult to reach, it is essential for workers themselves to take action to enhance their employability. Currently, just 4 of every 10 workers who are at risk of automation engage in training or reskilling.<sup>30</sup>

### participation in job-related training by group

share of adults, age 16 to 65, in each group that participate in training, 2012/2015

group of workers	from	to	group of workers
low skilled	22%	62%	high skilled
older (55 to 64)	26%	49%	younger (25 to 34)
high automation risk	36%	64%	low automation risk
own-account self-employed	35%	57%	full-time permanent
displaced	22%	26%	unemployed

Source: OECD Employment Outlook 2019

The global workforce is more educated than ever before. In little more than two decades, the number of people holding university or college qualifications has nearly doubled across OECD countries.<sup>31</sup> Yet sourcing the talent and skills companies need continues to pose an enormous challenge. There is a widening mismatch between the skills of candidates and the requirements of jobs. That also means there is a great deal of potential waiting to be unlocked if we act.

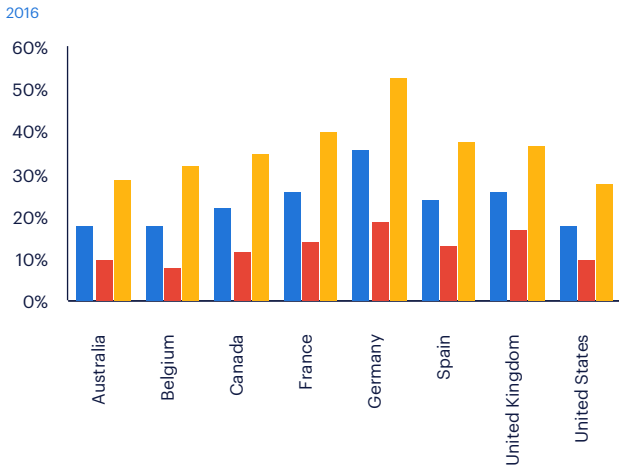
Demand for lower-skilled labor has fallen as products and services move online and highly skilled technical workers have become increasingly sought-after.<sup>32</sup> In high-income nations, the importance of STEM education

<sup>28</sup> Brookings Institute (2019): Automation and Artificial Intelligence: How machines are affecting people and places  
<sup>29</sup> Brookings Institute (2019): Automation and Artificial Intelligence: How machines are affecting people and places  
<sup>30</sup> OECD (2019) Getting Skills Right: Future-Ready Adult Learning Systems  
<sup>31</sup> OECD Data (2020) Adult Education Level (indicator)  
<sup>32</sup> OECD (2019) The Future of Work: OECD Employment Outlook 2019

skills in the age of automation.

is well-recognized, and investment in this area is seen as a means to boost innovation and economic growth, as well as a source of national pride.

share of STEM studies in tertiary graduates



● total ● female ● male

Source: OECD.stats

Not everyone can be a coder or robot designer, of course, and non-technical skills will take center stage in the future of work alongside high-tech roles.<sup>33</sup> By 2030, some of the most in-demand worker competencies will be soft skills like critical thinking, creativity and emotional intelligence.<sup>34</sup> Personal care and domestic services are examples of roles that are difficult to automate and which humans rather than machines are uniquely qualified to perform.<sup>35</sup>

Global labor market needs are continually shifting, and many of the children in school today will grow up to work in jobs that don't yet exist.<sup>36</sup> Equipping young learners for a world we cannot see is challenging, but they will need support to prepare for tomorrow's workplace – and when they arrive there too. Historically, education has been a rite of passage in early life, but as technology accelerates, so too must our human skills and abilities. The emphasis must move to a lifelong learning approach that enables people to transition between various activities and roles in their careers.

by 2030, some of the most in-demand worker competencies will be soft skills like critical thinking, creativity and emotional intelligence.



key insights

- Rising education levels have moved opportunities away from rural communities and resulted in rapid urbanization across the world.
- Innovative technologies are creating more new jobs than they are automating, but they are also changing the skills required in the global labor market.
- Greater efforts are needed to enable reskilling and upskilling across industries, and future generations of workers will need to be lifelong learners.

<sup>33</sup> World Economic Forum (2016) Future of Jobs Report

<sup>34</sup> World Economic Forum (2016) Future of Jobs Report

<sup>35</sup> Brookings Institute (2019): Automation and Artificial Intelligence: How machines are affecting people and places

<sup>36</sup> World Economic Forum (2018) Future of Jobs Report



a sustainable

labor market.

An effective and sustainable labor market connects opportunities to people with the skills and knowledge needed to realize them. Over the past 60 years, workplaces have become more diverse and inclusive in many ways, but discrimination and exclusion remain a barrier to workforce sustainability. Yet, we know that

diversity and inclusivity help both people and firms achieve more.

Labor market mobility is crucial for the long-term success of every nation, especially those facing the dual challenge of aging populations and skills shortages. To ensure that growth is sustainable in the years ahead, we

2030 Sustainable Development Goals



Source: United Nations

have to mobilize the talent, perspectives and resources of many more people. We need to ensure they can access decent work and help them thrive as part of the global economy.



### the evolution of work

Remarkable progress has been made toward eradicating global poverty over recent generations. Between 1990 and 2017, more than a billion people were lifted out of extreme poverty, largely due to the availability of better jobs.<sup>37</sup> The United Nations' target to end poverty in all its forms is 2030, but this is only possible if we continue to create decent jobs available to all.<sup>38</sup>

Decent work, employment creation, social protection, rights at work and social dialogue represent integral elements of the United Nations' 2030 Agenda for Sustainable Development. Decent jobs provide a fair income, safe working conditions, bright prospects for personal development and the freedom for people to express their concerns and participate in the decisions that affect them. These features were hard to come by in the past, but they have become more common as technology has automated low-paid, repetitive and physically intensive work.

While better work has certainly emerged along the way, we cannot rely solely on technological breakthroughs to deliver decent jobs. In addition to scientific innovation, there is also a profound need for forward-thinking and progressive policies to sustain a more equitable job

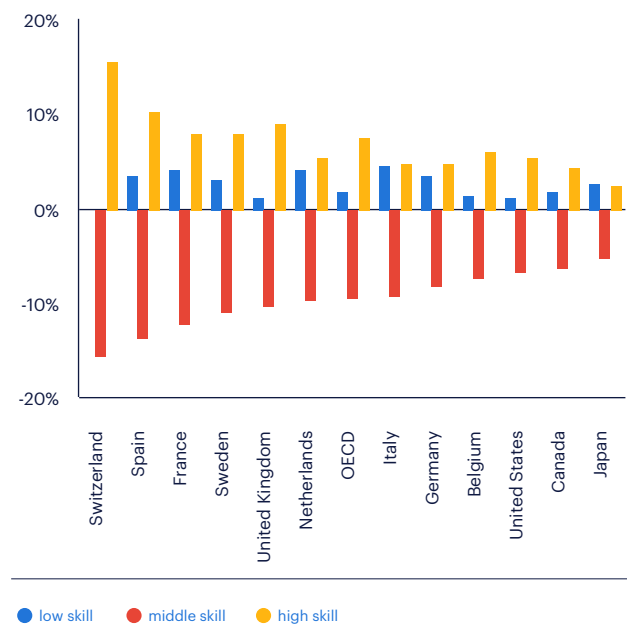
we know that diversity and inclusivity help both people and firms achieve more.

market into the future. In recognition of the challenges we face, there has been a growing agenda for social innovation among policymakers, think tanks and unions.

Stronger organization of the workforce can lead to a more flexible and dynamic labor market, grounded in a stronger stakeholder relationship between workers, unions and employers. Cooperation has become as important as competition in the labor market, and new models of social dialogue between workers, employers and governments are emerging to provide the essential conditions for decent jobs.<sup>39</sup>

### polarization of labor markets as share of middle-skill jobs is decreasing

change in employment share of jobs by skill level, 1990 to 2015



Source: OECD Employment Outlook 2019

<sup>37</sup> World Bank (2020) Poverty and Shared Prosperity 2020: Reversals of Fortune

<sup>38</sup> United Nations (2020) The Sustainable Development Goals Report 2020

<sup>39</sup> International Labour Organization (2017) Towards the Universal Ratification of Convention No. 144 on Tripartite Consultation by the ILO Centenary in 2019

a sustainable labor market.

High-income nations leading the global knowledge economy must continue to champion the meaningful ideas and cross-border partnerships that create opportunities and equitable outcomes for all. This is what makes a difference not just to the statistics of tomorrow's work but to the human experience of it as well.

It is only through collaboration and consensus-building among all stakeholders that we can make decent jobs a reality for everyone. Around 1.3 billion people are either underqualified or overqualified for the work they perform.<sup>40</sup> This skills mismatch is exacerbated during recessions when investments in technologies increase, leading to more automation.<sup>41</sup> The urgency to ensure decent work will only grow as new technologies arrive in the years ahead.



**inclusive labor markets**

Women's participation in the global labor market has been growing for many decades, but there is much to overcome in gender inequality. In 2019, the participation rate of women in the labor force was just 47%, compared to 74% for men.<sup>42</sup> According to the World Economic Forum, an equal level of labor participation won't be shared by men and women before 2120.<sup>43</sup> Gender discrimination still manifests in unequal access to work and, even for those with jobs, unequal working conditions.

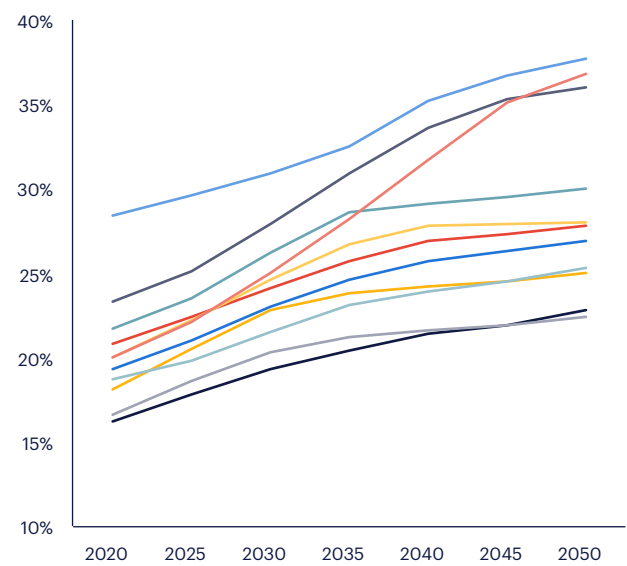
<sup>40</sup> Boston Consulting Group (2020) Fixing the Global Skills Mismatch  
<sup>41</sup> Randstad (2016) Flexibility@Work 2016 - Future of Work in the Digital Age: evidence from OECD countries  
<sup>42</sup> International Labour Organization (2020) World Employment and Social Outlook Trends 2020  
<sup>43</sup> World Economic Forum (2020) The Global Gender Gap Report 2020  
<sup>44</sup> OECD (2008) Ending Job Discrimination  
<sup>45</sup> OECD (2008) Ending Job Discrimination  
<sup>46</sup> OECD (2008) Ending Job Discrimination  
<sup>47</sup> International Labour Organization (2020) World Employment and Social Outlook Trends 2020

The data shows that the ethnicity gap is often as large as the gender gap.<sup>44</sup> Second-generation immigrants appear to have 10% fewer chances to secure a job than their non-immigrant counterparts.<sup>45</sup> In countries such as Canada, the U.K. and the U.S., figures indicate that longer-established racial minorities fare even worse than second-generation immigrants.<sup>46</sup>

Age is also a factor. There are more people aged 15 to 24 in higher education than there were three decades ago, which also means that fewer young people are employed. By some measures, their labor market participation has decreased by 15% since 1994, with the most pronounced drop in middle-income countries.<sup>47</sup> These workers may enter the workforce later, but they bring better skills and can obtain better jobs when they do.

**aging populations**

population age 65+



- Australia
- Belgium
- Canada
- France
- Germany
- Italy
- Japan
- Netherlands
- Spain
- United Kingdom
- United States

Source: UN population division

in 2018, for the first time in history, there were more people aged 65 and over in the world than there were children under the age of five.

Virtually all countries have experienced growth in the number and proportion of older people in their populations over the past six decades. In 2018, for the first time in history, there were more people aged 65 and over in the world than there were children under the age of five.<sup>48</sup> The graying global population is transforming industries and impacting economic development.

At the center of this demographic shift are nations where 1 in 5 people are over the age of 65. The United Nations calls these countries “super-aged” societies and projects there will be 27 of them by 2030.<sup>49</sup> The challenges of being a super-aged society are becoming increasingly clear, especially in developed countries.

Longer life expectancy means that people are remaining active in the workforce later in their lives. They can contribute to economic and social prosperity for longer, but they are also living longer with debilitating illness and frailty.<sup>50</sup> There has been an increase in demand for healthcare workers as a result, with the International Labour Organization suggesting this could create 475 million sector jobs across 45 countries by 2030.<sup>51</sup>

The need for healthcare professionals is certain, but it is unclear where they will come from. Countries such as South Korea and Japan have responded to the challenge by investing heavily in robots and other futuristic solutions, but so far, the results have been mixed. Automation is clearly not right for all tasks or roles.<sup>52</sup> In those cases, labor market mobility offers a more promising solution.

<sup>48</sup> United Nations (2019) World Population Prospects

<sup>49</sup> Randstad (2017) Flexibility@Work 2017

<sup>50</sup> OECD (2019) New Job Opportunities in an Ageing Society

<sup>51</sup> International Labour Organization (2019) The Employment Generation Impact of Meeting SDG Targets in Early Childhood Care, Education, Health and Long-Term Care in 45 Countries

<sup>52</sup> OECD (2019) Employment Outlook 2019: The Future of Work

<sup>53</sup> United Nations (2019) World Population Prospects 2019

<sup>54</sup> United Nations (2019) International Migrant Stock 2019



### mobility of talent

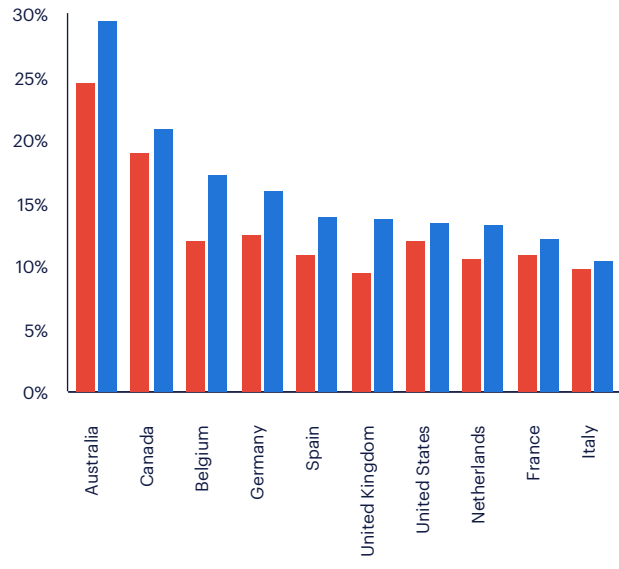
The world will be home to more than 10 billion people by 2060.<sup>53</sup> As people live longer, developing countries are set to experience population booms while many high-income nations expect to stagnate or even decline. In countries with aging populations, this creates a shortfall between the number of people paying taxes and the number requiring pensions and healthcare. This dynamic will provide a strong incentive for governments to pursue a better balance through migration policy.

According to the United Nations, 272 million people currently work outside their country of origin, an increase of 50 million since 2010.<sup>54</sup> Labor market mobility has unlocked enormous potential for individuals, businesses and society throughout history, and there are more international migrants in the world than ever before.

a sustainable labor market.

global mobility of talent is increasing

foreign-born population as share of total population



● 2006 ● 2019

Source: OECD.stats

Despite the need for sector-specific skills in high-income nations, migrants often face disadvantages when moving abroad to take up work. Nearly every labor market in the OECD discounts foreign degrees, meaning international migrants' skills and qualifications can go unrecognized.<sup>55</sup> In the EU, a lack of sufficient language training impacts migrants' job prospects too.<sup>56</sup> Overcoming the barriers to integration for migrants could help address skills shortages and mismatches across social care and other vital services.

Away from high-income nations, the global story is progressing quickly too. Many low-wage and relatively unskilled manufacturing jobs have moved over the past several decades from the developed world to nations like India and China. In the 2020s, a swell in the number of college-trained workers coming from developing markets is expected, resulting from improved access to skills and education.<sup>57</sup>

Already, 54% of the world's college graduates come from emerging markets, and this will reach 60% by 2030.<sup>58</sup> In the past, these new entrants to the workforce

54% of the world's college graduates come from emerging markets.

would have been required to migrate to higher-income nations to find positions matching their skills, but with the emergence of remote work, it may be possible for them to seek opportunities across borders without relocating.

The relationship between location and career prospects has never been less direct. What is clear, though, is that the potential for a more diverse and inclusive global workforce is an opportunity we cannot afford to miss. We must all do our part to build the vibrant and sustainable labor market, economy and society of tomorrow. That means empowering all social groups to participate, removing legal barriers to employment where possible, embracing new ways of working and striving to support a healthy and productive work-life balance.



<sup>55</sup> United Nations (2019) International Migrant Stock 2019  
<sup>56</sup> OECD (2018) Settling in 2018: Indicators of Immigrant Integration  
<sup>57</sup> Oxford Economics (2012) Global Talent 2021  
<sup>58</sup> United Nations (2019) International Migrant Stock 2019



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a sustainable labor market.

## key insights

- As shifts in age demographics and the global distribution of talent occur, a healthy and sustainable labor market increasingly depends on inclusion.
- Improving diversity in terms of age, gender and ethnicity is essential for organizational resilience, economic growth and social stability. Flexibility at work helps achieve this.
- Significant progress has been made over the past 60 years, but there is still work to do to reduce social inequalities and unlock decent jobs for all.

# annex.

## 35 data on labor and flexible labor markets

# data on labor and flexible labor markets.

## unemployment

unemployment rates in %, age 15 to 64, 2020 is 2020q4 (UK 2020q3)

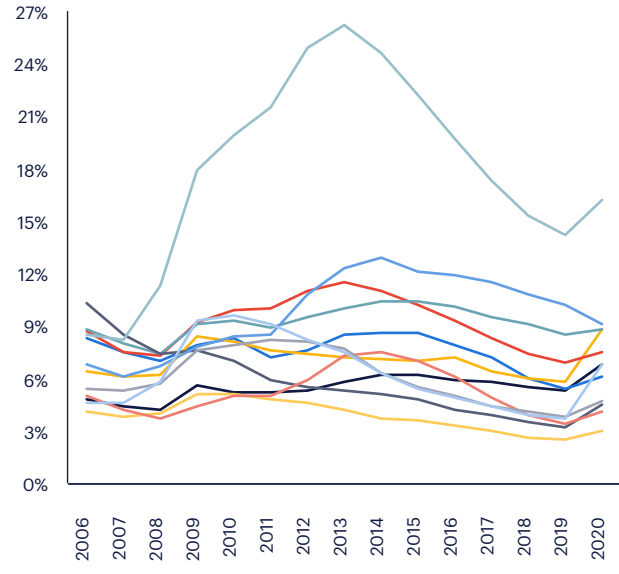
	year										gender		age	
	2012	2013	2014	2015	2016	2017	2018	2019	2020	female	male	15 to 24	25 to 64	
Australia	5.3	5.8	6.2	6.2	5.9	5.8	5.5	5.3	6.8	6.9	6.7	15.0	5.3	
Austria	4.9	5.4	5.7	5.8	6.1	5.6	4.9	4.6	5.6	5.5	5.6	10.0	5.0	
Belgium	7.6	8.5	8.6	8.6	7.9	7.2	6.0	5.4	6.1	5.8	6.3	16.6	5.2	
Canada	7.4	7.2	7.1	7.0	7.2	6.4	6.0	5.8	8.8	8.5	9.1	17.8	7.3	
Chile	6.8	6.3	6.7	6.5	6.9	7.2	7.7	7.5	11.1	11.8	10.5	24.5	9.9	
Colombia	10.7	10.0	9.4	9.2	9.5	9.7	10.0	10.8	15.3	20.4	11.7	26.7	13.0	
Czech Republic	7.1	7.0	6.2	5.1	4.0	2.9	2.3	2.1	2.9	3.5	2.5	9.4	2.6	
Denmark	8.0	7.6	7.2	6.4	6.2	6.0	5.3	5.2	5.8	6.1	5.5	12.9	4.6	
Estonia	10.3	8.9	7.6	6.3	7.0	5.9	5.5	4.6	8.0	7.9	8.0	21.8	6.8	
EU 27	11.0	11.5	11.0	10.2	9.3	8.3	7.4	6.9	7.5	8.0	7.1	17.6	6.6	
Finland	7.8	8.3	8.8	9.6	9.0	8.8	7.5	6.9	8.1	7.9	8.4	22.3	6.4	
France	9.5	10.0	10.4	10.4	10.1	9.5	9.1	8.5	8.8	8.6	8.9	22.1	7.3	
Germany	5.5	5.3	5.1	4.8	4.2	3.9	3.5	3.2	4.5	4.6	4.5	6.2	4.4	
Greece	24.7	27.7	26.7	25.1	23.7	21.7	19.5	17.5	16.7	20.5	13.8	35.3	15.8	
Hungary	11.1	10.3	7.8	6.9	5.2	4.2	3.8	3.5	4.5	4.6	4.3	12.7	3.9	
Iceland	6.1	5.5	5.1	4.2	3.1	2.9	2.8	3.6	6.0	5.5	6.4	10.3	5.2	
Ireland	15.8	14.0	12.1	10.2	8.6	6.9	5.9	5.1	7.2	7.4	7.0	19.7	5.5	
Israel	7.0	6.3	6.0	5.3	4.9	4.3	4.1	3.9	4.7	4.5	5.0	8.8	4.3	
Italy	10.8	12.3	12.9	12.1	11.9	11.5	10.8	10.2	9.1	10.0	8.4	29.6	..	
Japan	4.6	4.2	3.7	3.6	3.3	3.0	2.6	2.5	3.0	2.6	3.2	5.0	2.8	
Korea	3.3	3.2	3.6	3.7	3.8	3.8	3.9	3.8	4.3	4.5	4.1	10.8	3.9	
Latvia	15.4	12.1	11.1	10.1	9.9	8.9	7.6	6.5	8.1	7.2	9.1	14.9	7.7	
Lithuania	13.7	12.0	10.9	9.3	8.1	7.3	6.4	6.5	10.3	9.7	10.9	27.5	9.0	
Luxembourg	5.2	5.9	5.9	6.7	6.3	5.5	5.6	5.6	6.6	6.5	6.7	21.8	5.4	
Mexico	5.1	5.1	5.0	4.5	4.0	3.6	3.4	3.7	4.5	4.2	4.6	8.0	3.8	
Netherlands	5.9	7.3	7.5	7.0	6.1	4.9	3.9	3.4	4.1	4.3	3.9	9.7	3.0	
New Zealand	6.7	6.1	5.6	5.6	5.4	5.0	4.5	4.3	4.9	5.4	4.5	13.7	3.4	
Norway	3.2	3.5	3.6	4.5	4.8	4.3	3.9	3.8	5.2	4.8	5.5	13.0	4.0	
Poland	10.2	10.5	9.1	7.6	6.3	5.0	3.9	3.4	3.3	3.6	3.1	12.1	2.7	
Portugal	16.3	17.0	14.5	13.0	11.5	9.2	7.3	6.7	7.0	7.2	6.8	23.5	5.9	
Slovak Republic	14.0	14.3	13.2	11.5	9.7	8.2	6.6	5.8	7.1	7.4	6.8	20.3	6.3	
Slovenia	9.0	10.3	9.9	9.1	8.1	6.7	5.2	4.5	4.8	5.9	3.9	14.6	4.2	
Spain	24.9	26.2	24.6	22.2	19.7	17.3	15.3	14.2	16.2	18.4	14.2	40.3	14.6	
Sweden	8.2	8.2	8.2	7.6	7.2	6.9	6.5	7.0	8.5	8.6	8.5	23.5	6.8	
Switzerland	4.6	4.9	5.0	4.9	5.1	5.0	4.9	4.5	5.0	5.4	4.8	9.3	4.5	
Turkey	8.4	8.9	10.1	10.5	11.1	11.1	11.1	14.0	13.3	14.9	12.5	25.1	11.2	
United Kingdom	8.1	7.7	6.3	5.5	5.0	4.4	4.1	3.8	4.7	4.3	5.1	14.4	3.4	
United States	8.2	7.5	6.3	5.4	4.9	4.4	3.9	3.7	6.8	6.6	6.9	12.0	6.0	

Source: OECD.stats

data on labor and flexible labor markets.

unemployment rate

age 15 to 64

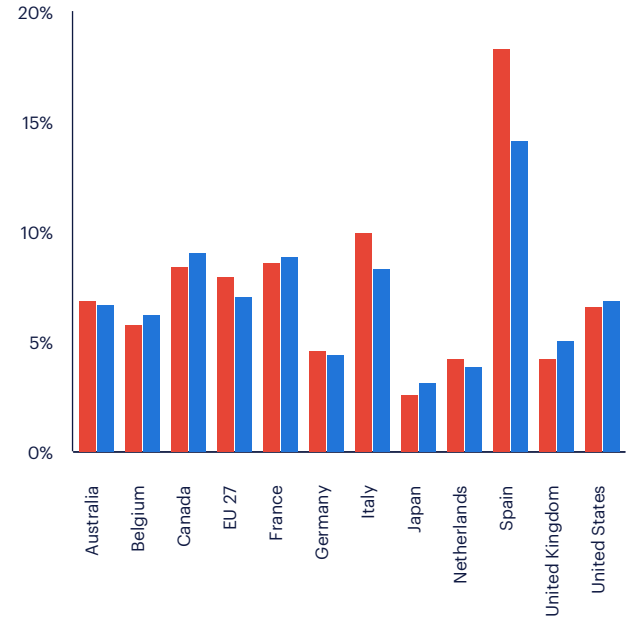


- Australia ● Belgium ● Canada ● EU 27 ● France
- Germany ● Italy ● Japan ● Netherlands ● Spain
- United Kingdom ● United States

Source: OECD.stats

unemployment by gender

unemployment rates, age 15 to 64, 2020q4 (UK 2020q3)

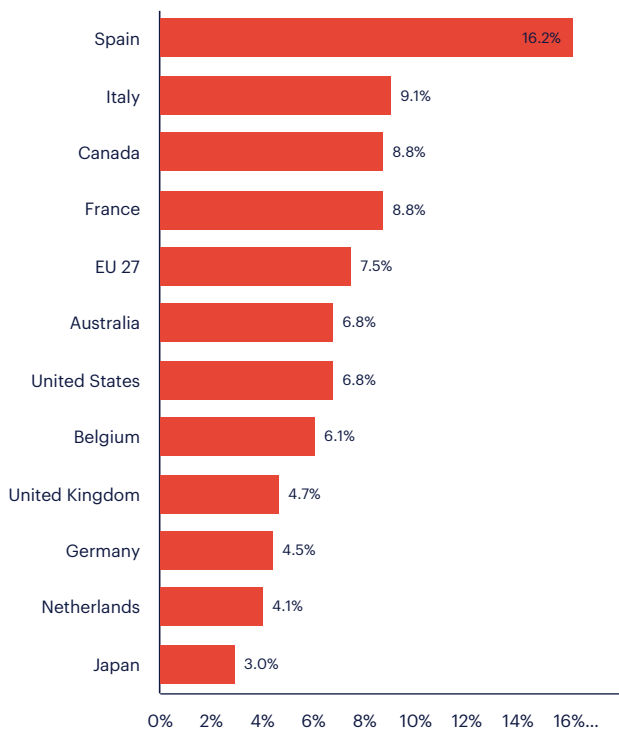


- female ● male

Source: OECD.stats

unemployment rate

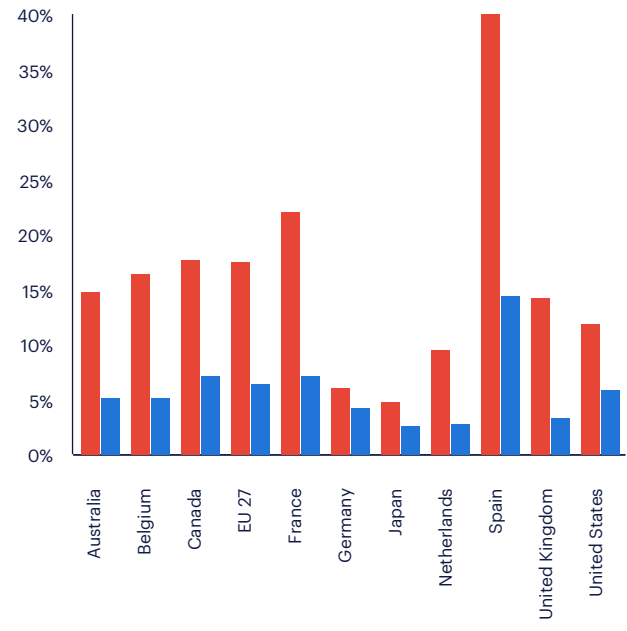
2020q4 (UK 2020q3), age 15 to 64



Source: OECD.stats

unemployment by age group

unemployment rates, 2020q4 (UK 2020q3)



- age 15 to 24 ● age 25 to 64

Source: OECD.stats

data on labor and flexible labor markets.

## labor participation

activity rates in %, age 15 to 64, 2020 is 2020q3

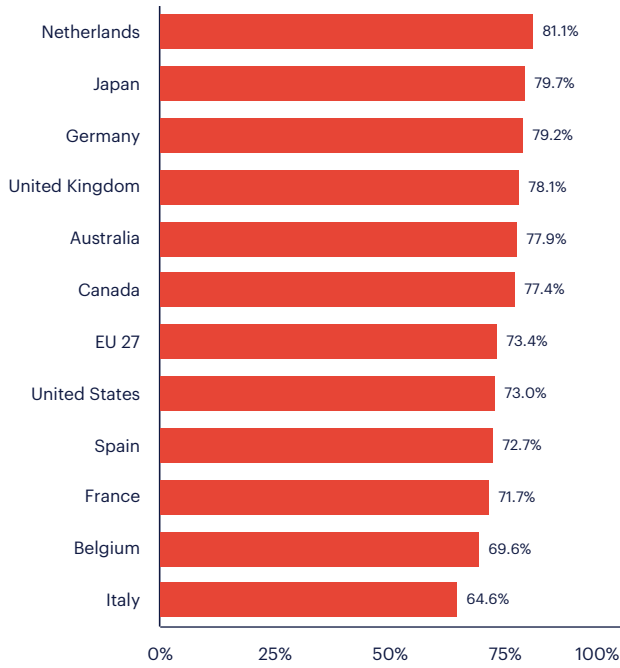
	year									gender		age		
	2012	2013	2014	2015	2016	2017	2018	2019	2020	female	male	15 to 24	25 to 54	55 to 64
Australia	76.4	76.4	76.3	76.9	76.9	77.4	78.0	78.5	77.9	73.4	82.4	66.2	84.5	67.1
Austria	75.1	75.5	75.4	75.5	76.2	76.4	76.8	77.1	78.0	73.4	82.5	59.2	89.6	57.5
Belgium	66.9	67.6	67.7	67.6	67.6	68.0	68.6	69.1	69.6	65.5	73.6	31.7	85.3	55.5
Canada	77.7	77.9	77.6	77.8	77.9	78.2	78.2	78.7	77.4	73.8	81.1	62.0	86.2	65.7
Chile	67.2	67.4	67.8	67.9	68.1	68.9	69.4	69.3	62.8	..	..	26.4	74.9	60.4
Colombia	74.2	73.9	74.0	74.5	74.3	74.1	73.7	73.2	68.8	56.8	81.4	46.9	79.8	60.7
Czech Republic	71.6	72.9	73.5	74.1	75.0	75.9	76.6	76.7	76.6	69.1	83.7	28.0	88.8	69.9
Denmark	77.2	76.6	76.6	77.0	77.5	77.9	78.2	79.1	79.6	76.6	82.5	62.2	86.6	75.0
Estonia	74.8	75.1	75.3	76.7	77.5	78.8	79.1	78.9	79.7	76.4	83.1	44.6	88.3	78.0
EU 27	71.0	71.3	71.7	71.9	72.3	72.7	73.1	73.4	73.4	67.9	78.8	39.0	85.8	63.2
Finland	75.2	75.2	75.4	75.8	75.9	76.8	77.9	78.3	78.9	77.1	80.8	53.4	88.0	73.4
France	70.7	71.1	71.0	71.3	71.4	71.5	71.9	71.7	71.7	68.2	75.5	38.0	87.5	56.9
Germany	77.2	77.7	77.7	77.6	77.9	78.3	78.7	79.2	..	75.0	84.0	51.0	88.0	75.0
Greece	67.5	67.5	67.4	67.8	68.2	68.3	68.2	68.5	68.1	60.1	76.3	22.3	84.6	51.8
Hungary	63.7	64.7	67.0	68.7	70.1	71.2	72.0	72.6	73.5	65.9	81.0	32.5	86.6	62.3
Iceland	84.9	85.8	87.4	88.4	89.4	88.7	87.5	87.3	88.0	85.0	90.9	79.5	91.1	85.5
Ireland	71.1	71.8	71.8	72.1	72.7	72.7	73.0	73.3	73.0	67.3	78.7	48.0	82.8	64.6
Israel	71.5	71.6	72.2	72.2	72.1	72.1	72.0	71.7	69.9	67.7	72.1	42.3	81.5	70.1
Italy	63.5	63.4	64.0	64.1	65.0	65.5	65.7	65.7	64.6	54.9	74.4	25.3	77.0	56.9
Japan	74.0	74.9	75.6	76.1	77.0	77.6	78.9	79.7	79.7	72.6	86.6	48.7	87.9	78.8
Korea	66.5	66.8	68.0	68.4	68.7	69.2	69.3	69.5	68.6	59.1	77.9	28.2	77.8	68.8
Latvia	74.4	74.0	74.6	75.8	76.3	77.0	77.7	77.3	78.4	76.2	80.6	34.9	89.2	75.6
Lithuania	71.8	72.4	73.7	74.1	75.5	76.0	77.3	78.1	78.2	77.5	78.9	36.6	89.5	75.9
Luxembourg	69.4	69.9	70.8	70.9	70.0	70.2	71.1	72.0	72.7	69.7	75.5	36.1	89.1	45.6
Mexico	64.2	64.1	63.6	63.6	63.6	63.4	63.7	64.6	..	49.0	82.0	45.0	75.0	57.0
Netherlands	79.0	79.4	79.0	79.6	79.7	79.8	80.3	80.9	81.1	77.3	84.9	69.6	87.6	73.1
New Zealand	77.0	77.4	78.6	78.7	79.9	80.9	81.2	80.9	80.6	76.1	85.2	62.9	86.8	79.0
Norway	78.3	78.2	78.0	78.2	78.1	77.3	77.9	78.3	78.7	76.2	81.0	57.7	86.1	74.4
Poland	66.5	67.0	67.9	68.1	68.8	69.6	70.1	70.6	71.4	64.2	78.6	31.8	86.0	54.0
Portugal	73.4	73.1	73.3	73.4	73.7	74.7	75.1	75.5	74.9	72.7	77.3	30.5	90.0	65.7
Slovak Republic	69.4	69.9	70.3	70.9	71.9	72.1	72.4	72.7	72.8	66.9	78.6	28.8	86.1	62.1
Slovenia	70.4	70.5	70.9	71.8	71.7	74.2	75.1	75.3	74.7	72.1	77.1	34.7	92.1	51.9
Spain	74.3	74.3	74.2	74.3	74.2	73.9	73.7	73.8	72.7	68.0	77.5	32.1	85.8	62.5
Sweden	80.3	81.1	81.5	81.8	82.1	82.5	82.8	82.9	83.3	81.5	85.1	54.3	91.5	83.3
Switzerland	82.3	82.4	82.9	83.3	83.9	84.0	84.2	84.3	84.3	80.4	88.0	66.3	91.2	76.3
Turkey	53.4	54.4	55.1	56.0	57.0	58.0	58.5	58.4	56.3	36.3	76.2	42.1	66.0	34.9
United Kingdom	76.1	76.4	76.7	76.9	77.3	77.6	77.9	78.2	78.1	74.2	82.0	55.8	87.5	68.1
United States	73.1	72.8	72.7	72.6	73.0	73.3	73.6	74.1	73.0	67.8	78.3	53.9	81.4	64.7

Source: OECD.stats

data on labor and flexible labor markets.

### labor participation

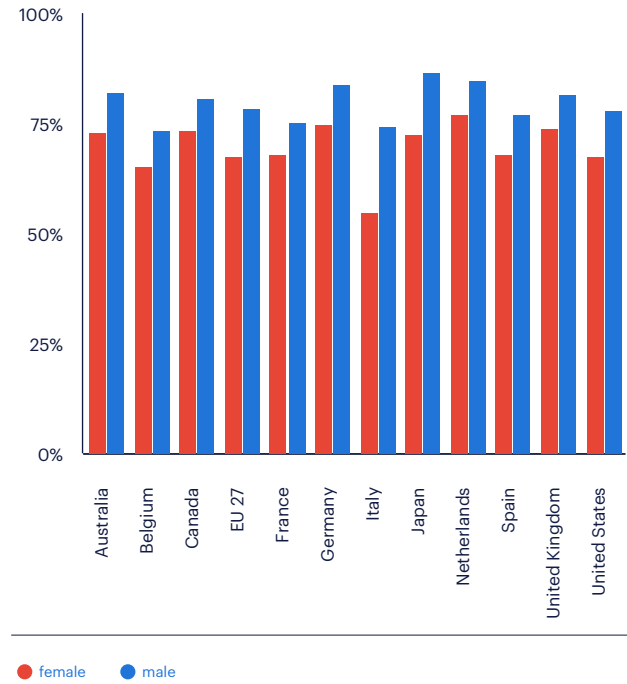
activity rates, age 15 to 64, 2020q3



Source: OECD.stats

### labor participation by gender

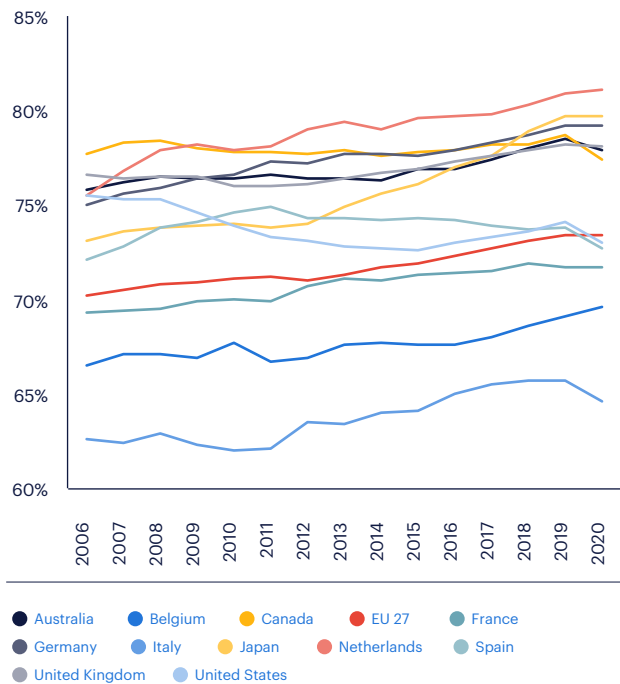
activity rates, age 15 to 64, 2020q3 (Germany 2019)



Source: OECD.stats

### labor participation

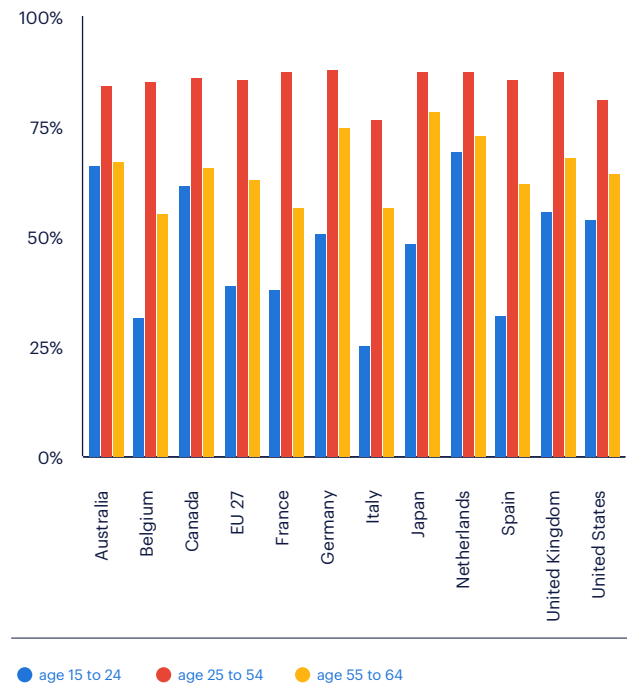
activity rates, age 15 to 64, 2020 is 2020q3



Source: OECD.stats

### labor participation by age group

activity rates, 2020q3 (Germany 2019)



Source: OECD.stats

data on labor and flexible labor markets.

## part-time employment

share of part-time employment in total employment, age 15 to 64

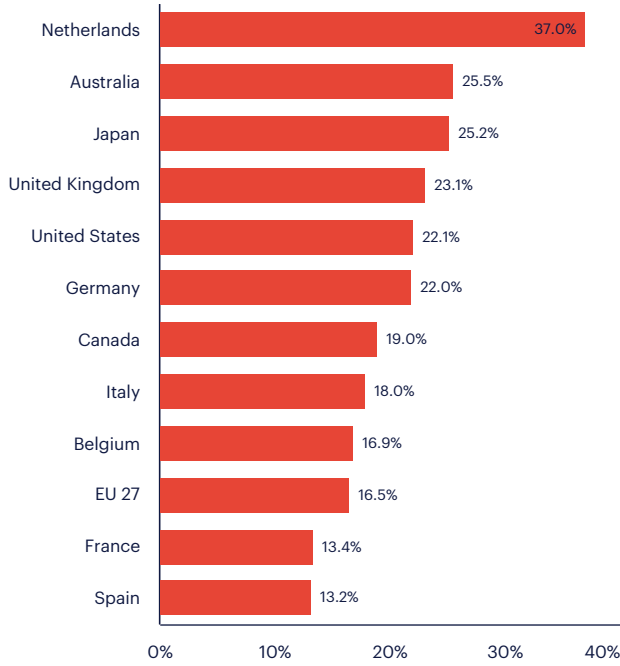
	year									gender		age		
	2012	2013	2014	2015	2016	2017	2018	2019	female	male	15 to 24	25 to 54	55 to 64	
Australia	24.6	24.9	25.2	25.2	25.9	25.7	25.6	25.5	37.1	15.3	49.3	18.8	24.5	
Austria	19.4	19.9	20.9	21.0	20.9	20.9	20.4	20.0	34.0	7.7	21.1	18.9	20.5	
Belgium	18.7	18.2	18.1	18.2	17.8	16.5	16.6	16.9	28.0	7.0	27.0	14.4	22.4	
Canada	19.0	19.1	19.3	18.9	19.2	19.1	18.7	19.0	25.6	12.9	49.1	11.5	17.1	
Chile	16.7	16.5	17.0	16.8	17.4	17.6	17.8	18.0	24.7	13.2	31.1	14.6	17.3	
Colombia	18.0	17.8	16.5	16.6	15.9	15.9	15.5	16.3	26.5	9.0	23.2	13.0	19.3	
Czech Republic	4.3	4.9	4.8	4.7	4.9	5.4	5.3	5.3	8.3	3.0	11.6	3.4	5.9	
Denmark	19.4	19.2	19.7	20.0	21.5	19.5	19.1	19.2	24.3	14.7	63.0	10.7	12.6	
Estonia	8.2	8.0	7.6	8.6	8.7	8.1	9.2	9.6	13.5	5.9	21.3	6.6	10.2	
EU 27	17.2	17.4	17.3	17.2	17.0	16.8	16.6	16.5	26.3	8.0	29.0	13.4	18.5	
Finland	13.0	13.0	13.3	13.4	14.0	14.0	14.1	14.6	18.7	10.7	39.4	8.8	14.0	
France	13.9	14.0	14.3	14.4	14.2	14.3	14.0	13.4	20.4	6.9	18.4	11.3	17.7	
Germany	22.2	22.6	22.3	22.4	22.1	22.2	22.0	22.0	36.3	9.5	24.1	19.4	23.5	
Greece	9.8	10.3	11.2	11.1	11.0	11.0	10.5	10.5	15.7	6.7	25.4	10.0	8.9	
Hungary	5.2	4.9	4.5	4.4	3.9	3.6	3.8	4.1	5.8	2.5	5.5	2.6	6.9	
Iceland	17.3	17.4	16.7	17.2	17.9	17.8	17.0	15.7	22.0	10.2	42.9	9.6	..	
Ireland	25.0	24.2	23.4	23.3	22.5	21.5	20.7	20.6	32.8	10.0	43.0	16.0	24.8	
Israel	16.1	15.9	16.0	15.9	15.5	15.3	15.5	15.1	21.5	9.1	20.7	11.8	14.9	
Italy	17.8	18.5	18.8	18.7	18.6	18.5	18.0	18.0	31.8	7.9	23.5	17.4	17.7	
Japan	20.5	21.9	22.7	22.7	22.8	22.4	23.9	25.2	39.1	14.2	39.6	18.1	25.2	
Korea	10.1	11.0	10.3	10.5	10.8	11.4	12.2	14.0	20.8	8.9	33.7	8.6	14.4	
Latvia	8.3	7.6	6.6	6.8	7.6	6.8	6.5	7.3	9.4	5.1	18.8	4.9	8.8	
Lithuania	7.9	7.3	7.2	6.8	7.2	7.2	6.7	5.8	7.4	4.1	12.2	3.8	6.7	
Luxembourg	15.5	15.3	15.5	14.9	13.9	14.6	12.8	11.6	20.2	4.4	15.2	10.3	18.4	
Mexico	18.9	18.4	18.2	18.1	17.7	17.2	17.0	17.6	26.9	11.7	21.4	14.7	21.9	
Netherlands	37.6	38.5	38.3	38.5	37.7	37.3	37.3	37.0	56.9	19.4	70.3	27.9	35.0	
New Zealand	22.3	21.9	21.8	21.6	21.3	21.2	20.8	19.8	29.6	10.8	36.6	14.1	18.5	
Norway	20.1	20.2	19.9	20.1	19.8	19.3	19.3	20.1	28.5	12.7	52.2	14.1	17.8	
Poland	8.0	7.7	7.1	6.4	6.0	6.1	6.1	5.8	9.0	3.3	10.3	4.3	7.9	
Portugal	12.5	12.0	11.0	10.5	8.3	7.8	7.1	7.1	9.9	4.2	14.9	4.8	7.8	
Slovak Republic	3.8	4.3	4.9	5.7	5.8	5.8	5.0	4.8	6.7	3.3	8.0	3.8	5.6	
Slovenia	7.9	8.6	9.6	9.2	8.2	8.9	8.5	7.2	10.4	4.6	25.9	4.8	9.2	
Spain	13.6	14.7	14.7	14.5	14.1	13.8	13.3	13.2	21.4	6.2	34.1	12.2	10.7	
Sweden	14.3	14.3	14.2	14.1	13.8	13.8	13.5	13.7	17.3	10.5	41.0	7.9	11.2	
Switzerland	26.0	26.4	26.9	26.8	26.6	26.7	26.7	26.9	44.9	11.0	21.3	24.8	29.5	
Turkey	11.8	12.3	10.6	9.9	9.4	9.6	9.9	9.5	16.2	6.4	14.5	7.3	15.3	
United Kingdom	25.0	24.6	24.1	24.0	23.8	23.5	23.2	23.1	36.1	11.2	34.8	18.1	28.8	
United States	19.4	19.2	18.9	18.4	18.3	17.8	22.6	22.1	28.5	16.6	44.8	16.4	20.0	

Source: OECD.stats (PT employment by common definition (US by national definition))

data on labor and flexible labor markets.

part-time employment

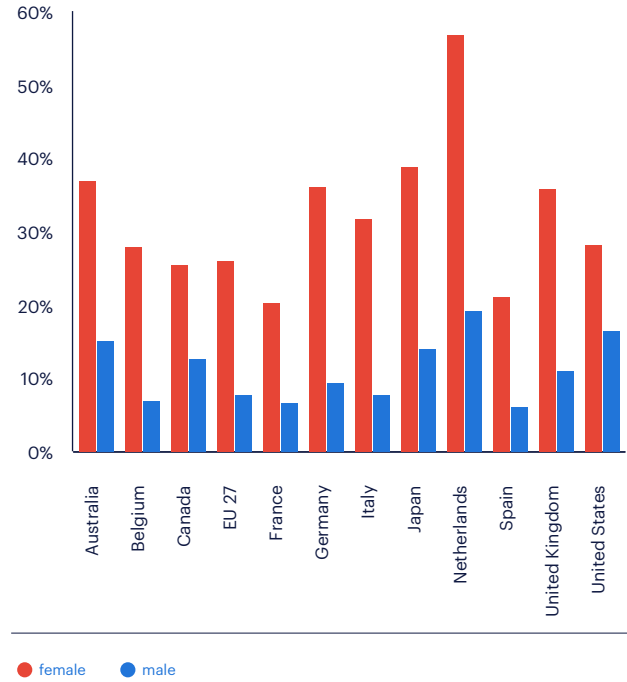
age 15 to 64, 2019



Source: OECD.stats (PT employment by common definition (US by national definition))

part-time employment by gender

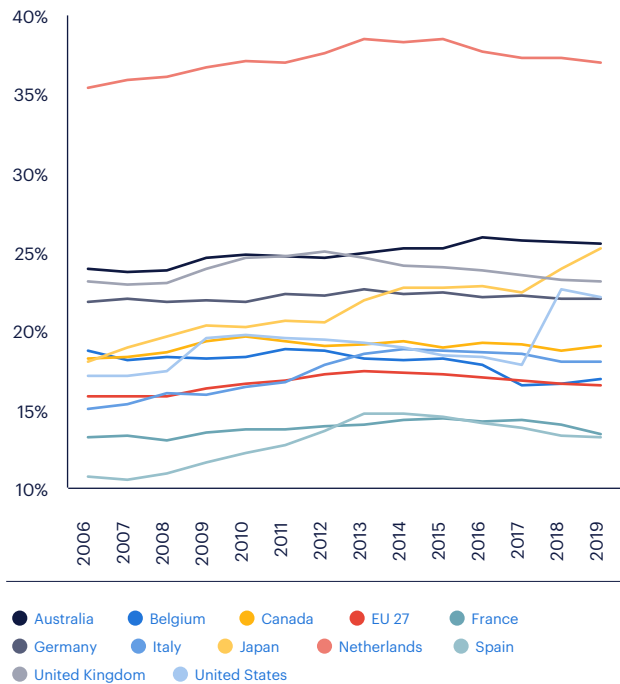
age 15 to 64, 2019



Source: OECD.stats (PT employment by common definition (US by national definition))

part-time employment

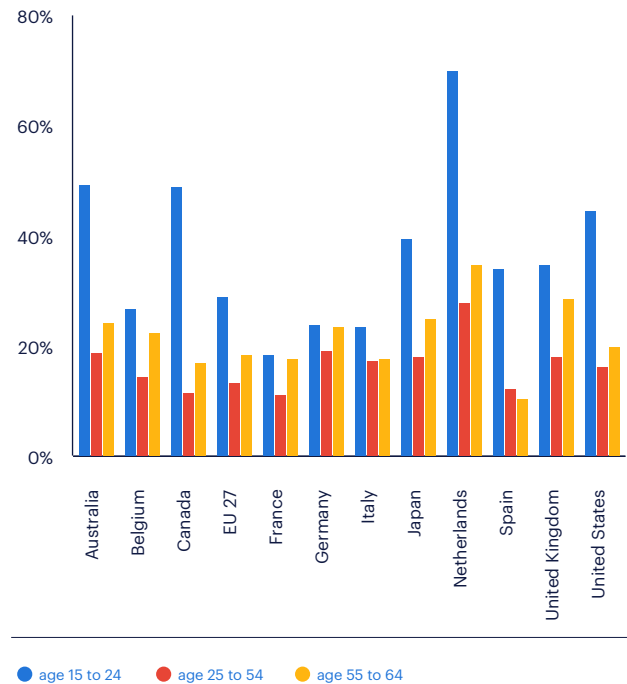
age 15 to 64



Source: OECD.stats (PT employment by common definition (US by national definition))

part-time employment by age group

2019



Source: OECD.stats (PT employment by common definition (US by national definition))



data on labor and flexible labor markets.

## self-employment

share of self-employment in total employment, age 15 to 64

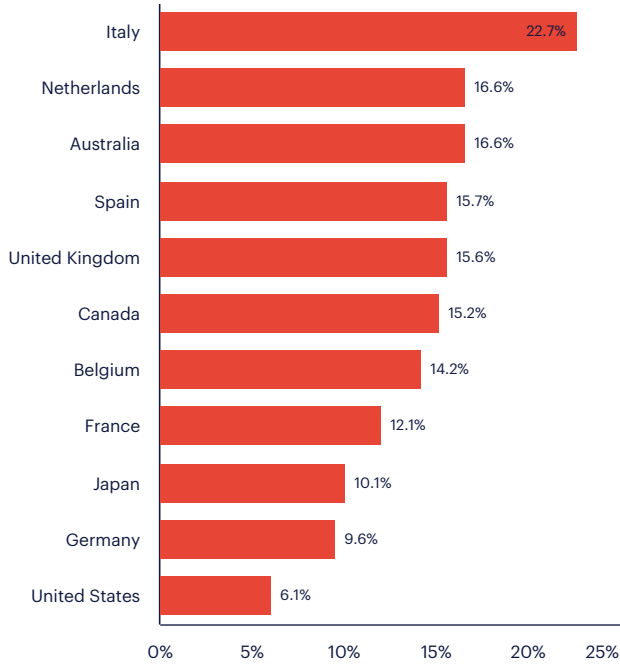
	year								gender		age	
	2012	2013	2014	2015	2016	2017	2018	2019	female	male	15 to 24	25 to 64
Australia	17.2	16.8	17.1	17.1	17.1	16.9	16.5	16.6	12.3	20.3	3.9	18.7
Austria	13.1	13.2	13.3	13.0	12.7	12.4	12.0	12.2	9.5	14.5	3.4	13.3
Belgium	14.4	15.1	14.6	15.2	14.8	14.3	14.0	14.2	10.7	17.3	5.5	14.9
Bulgaria	11.6	12.1	12.5	12.0	11.7	11.9	11.7	10.8	8.1	13.2	5.6	11.1
Canada	15.4	15.4	15.3	15.4	15.3	15.2	15.3	15.2	11.9	18.2	2.9	17.1
Chile	25.1	25.4	25.9	25.7	26.5	27.4	27.1	27.2	25.8	28.3	15.9	28.2
Colombia	53.2	52.3	51.5	51.1	51.1	51.1	51.4	49.6	48.5	50.3	41.8	50.9
Croatia	19.8	18.1	15.6	15.7	13.9	12.4	12.1	12.4	9.2	15.0	5.7	12.9
Czech Republic	18.4	17.9	18.0	17.3	17.2	17.1	16.9	16.8	12.3	20.4	6.8	17.3
Denmark	9.3	9.1	9.0	8.9	8.8	8.3	8.1	8.3	5.4	11.0	2.3	9.3
Estonia	8.9	9.1	9.1	9.4	9.6	10.2	10.7	11.0	7.1	14.7	3.7	11.6
Finland	13.6	13.4	14.0	14.2	14.0	13.2	13.2	13.5	9.7	17.0	4.0	14.6
France	11.4	11.3	11.6	11.5	11.8	11.6	11.7	12.1	8.7	15.3	2.8	13.0
Germany	11.6	11.2	11.0	10.8	10.4	10.2	9.9	9.6	7.0	11.9	1.6	10.5
Greece	36.6	37.0	36.0	35.0	34.1	34.1	33.5	31.9	26.5	35.7	16.2	32.6
Hungary	11.7	11.3	11.0	10.9	10.7	10.3	10.4	10.8	8.3	12.9	3.5	11.3
Iceland	12.6	12.8	12.9	12.7	12.3	12.0	12.2	11.9	8.1	15.4	3.9	13.5
Ireland	16.8	17.0	16.8	16.5	16.2	15.5	15.0	14.4	7.7	20.1	2.9	15.8
Italy	24.9	24.8	24.7	24.4	23.9	23.2	22.9	22.7	17.1	26.9	10.2	23.3
Japan	11.8	11.5	11.4	11.1	10.6	10.4	10.3	10.1	8.4	11.4	5.9	10.4
Korea	28.2	27.4	26.8	25.8	25.4	25.3	25.1	24.6	22.0	26.5	4.4	25.8
Latvia	11.4	11.6	11.5	12.6	12.9	12.7	11.5	11.6	9.9	13.3	6.0	11.9
Lithuania	11.1	11.8	12.1	12.3	12.3	12.0	11.7	11.7	8.6	14.9	6.0	12.1
Luxembourg	8.9	8.8	8.7	9.8	10.0	9.9	8.6	8.7	7.7	9.6	10.0	8.6
Netherlands	15.4	16.1	16.6	16.8	16.8	16.7	16.7	16.6	13.2	19.6	5.0	18.7
New Zealand	16.6	15.4	15.3	14.9	18.0	18.8	18.4	18.6	14.7	22.1	5.8	20.6
Norway	7.0	7.0	7.2	7.0	7.0	6.5	6.5	6.5	4.2	8.5	2.3	7.0
Poland	22.4	21.8	21.4	21.2	20.7	20.4	20.3	20.0	15.7	23.5	8.8	20.9
Portugal	22.1	21.9	19.8	18.4	17.8	17.0	16.7	16.9	12.9	20.7	4.1	17.7
Slovak Republic	15.5	15.6	15.5	15.2	15.4	15.3	14.8	15.1	9.9	19.3	8.9	15.4
Slovenia	16.2	16.9	18.6	16.5	14.2	14.6	15.2	13.7	9.7	17.0	7.4	14.1
Spain	17.3	17.9	17.6	17.3	16.9	16.5	16.0	15.7	11.7	19.0	5.5	16.2
Sweden	10.5	10.6	10.3	10.3	10.0	9.9	9.7	9.8	5.7	13.6	2.6	10.6
Switzerland	15.3	15.3	15.3	14.9	15.1	14.9	14.8	14.4	12.5	16.0	3.4	15.9
United Kingdom	14.6	14.6	15.2	15.0	15.4	15.4	15.1	15.6	11.2	19.5	5.5	16.9
United States	6.8	6.6	6.5	6.4	6.4	6.3	6.3	6.1	5.1	7.0	1.2	6.8

Source: ILOSTAT

data on labor and flexible labor markets.

self-employment

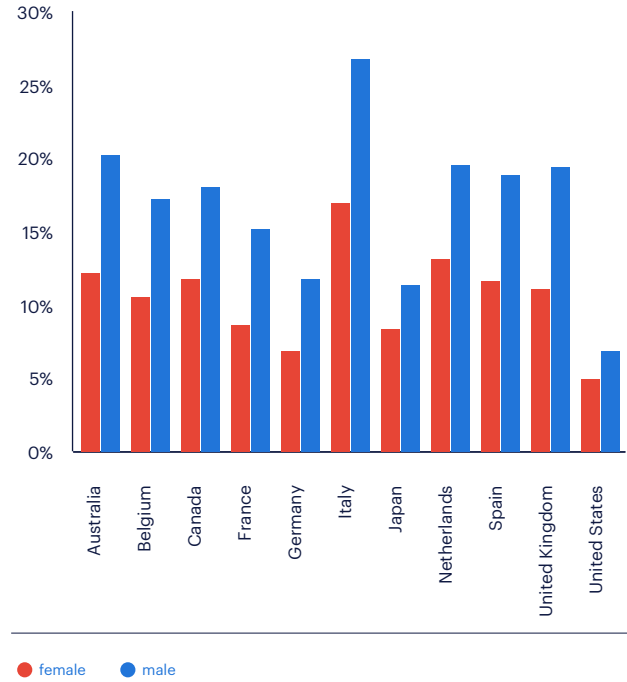
share of total employment, age 15 to 64, 2019



Source: ILOSTAT

self-employment employment by gender

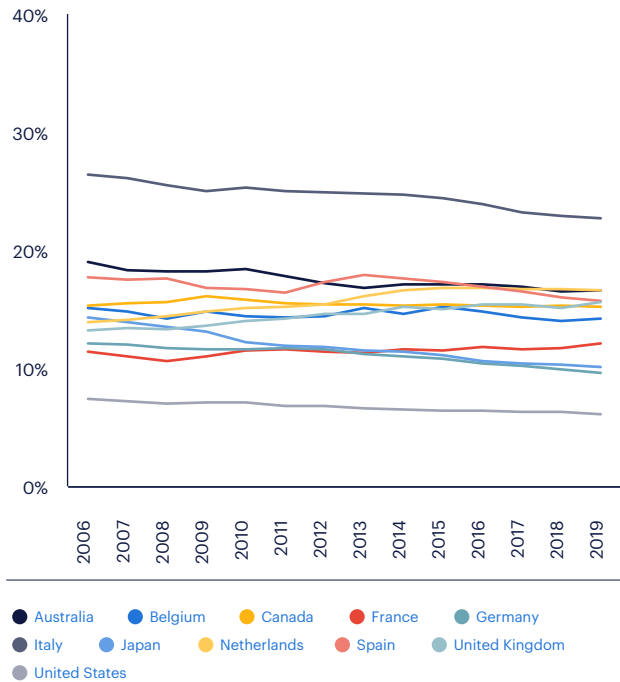
age 15 to 64, 2019



Source: ILOSTAT

self-employment

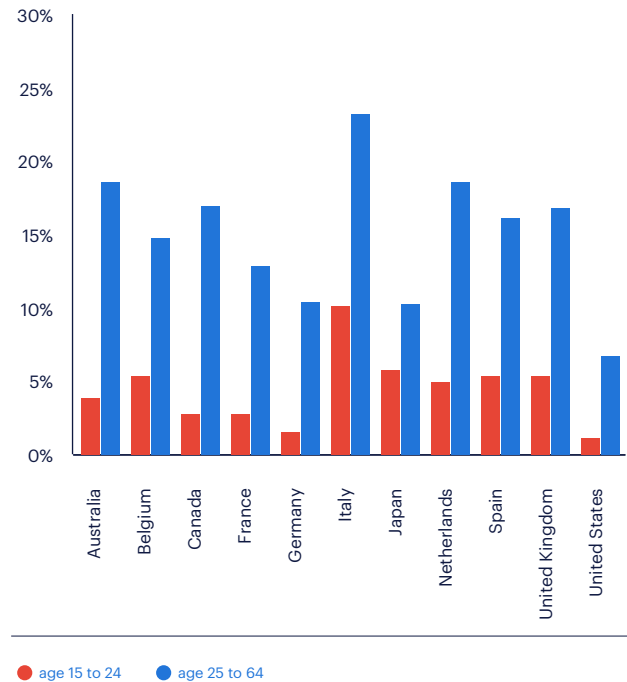
share of total employment, age 15 to 64



Source: ILOSTAT

self-employment by age group

2019



Source: ILOSTAT

## data on labor and flexible labor markets.

## temporary employment

share of temporary employment in total dependent employment, age 15 to 64, 2020 is 2020q3

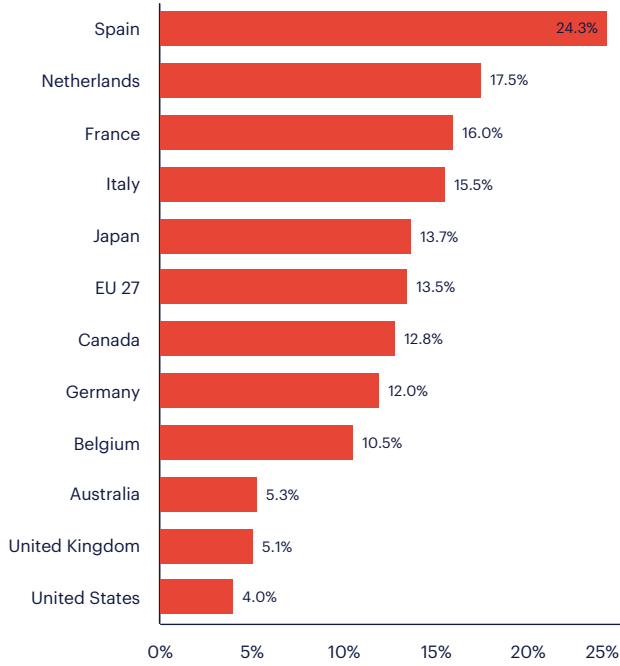
	year									gender		age		
	2012	2013	2014	2015	2016	2017	2018	2019	2020	female	male	15 to 24	25 to 54	55 to 64
Australia	5.5	5.2	5.4	5.4	5.4	5.3	..	..	..	5.9	4.7	5.5	5.5	4.3
Austria	9.3	9.2	9.2	9.1	9.0	9.2	9.1	8.7	8.8	8.5	9.0	37.2	5.8	2.8
Belgium	8.1	8.1	8.6	9.0	9.1	10.4	10.7	10.8	10.5	10.8	10.2	54.6	8.2	2.8
Canada	13.6	13.4	13.4	13.4	13.3	13.7	13.3	12.8	..	13.6	12.0	30.7	9.3	8.6
Chile	30.4	29.7	29.2	29.1	28.7	27.7	27.6	27.0	..	25.2	28.3	43.5	27.0	20.3
Colombia	30.2	30.3	29.0	29.2	28.3	28.2	28.8	28.8	..	31.2	26.9	41.1	27.8	18.5
Czech Republic	8.3	9.1	9.7	10.0	9.7	9.6	8.4	7.8	7.2	8.4	6.2	25.6	6.9	4.6
Denmark	8.4	8.5	8.2	8.4	12.9	12.3	10.7	10.8	10.8	12.1	9.6	33.9	8.7	3.8
Estonia	3.5	3.5	3.1	3.4	3.7	3.1	3.5	3.1	3.4	3.6	3.2	16.2	2.3	..
EU 27	14.9	14.8	15.2	15.4	15.6	15.7	15.5	15.0	13.5	14.0	13.0	47.8	12.3	6.2
Finland	15.5	15.3	15.4	15.1	15.6	15.8	16.2	15.5	15.7	18.0	13.5	47.2	14.2	7.2
France	15.2	15.3	15.3	16.0	16.2	16.8	16.6	16.3	16.0	16.4	15.5	58.5	13.0	8.3
Germany	13.8	13.4	13.1	13.2	13.2	12.9	12.6	12.0	..	11.7	12.3	50.9	8.7	3.0
Greece	10.2	10.2	11.6	11.9	11.2	11.4	11.3	12.6	10.5	11.9	9.3	24.8	11.0	7.8
Hungary	9.5	10.9	10.8	11.4	9.7	8.8	7.3	6.6	6.1	6.9	5.5	13.1	5.4	6.6
Iceland	13.3	14.4	13.6	13.0	12.0	10.7	9.4	7.9	11.3	12.1	10.6	35.7	7.5	..
Ireland	10.8	10.8	10.3	9.6	9.0	9.1	9.9	9.7	9.1	9.6	8.7	37.2	5.2	6.5
Italy	13.8	13.2	13.6	14.1	14.0	15.5	17.1	17.1	15.5	15.2	15.8	59.0	16.2	7.5
Japan	13.7	..	..	..	..	..	..	..	..	20.5	8.6	26.9	10.5	15.6
Korea	23.0	22.3	21.6	22.2	21.9	20.6	21.2	24.4	..	26.9	22.3	30.1	17.4	33.2
Latvia	4.7	4.3	3.3	3.8	3.7	3.0	2.7	3.2	2.2	2.1	2.3	..	2.2	..
Lithuania	2.6	2.7	2.8	2.1	2.0	1.7	1.6	1.5	1.8	1.7	1.9	12.5	0.9	..
Luxembourg	7.6	7.0	8.1	10.2	9.0	9.1	9.8	9.2	7.6	8.4	6.9	35.8	6.5	..
Netherlands	19.2	20.2	21.1	20.0	20.6	21.7	21.4	20.2	17.5	18.7	16.3	49.9	13.5	5.6
Norway	8.5	8.4	7.9	8.0	8.8	8.5	8.5	8.0	8.6	9.9	7.4	31.1	6.8	2.0
Poland	26.8	26.8	28.3	28.0	27.5	26.1	24.3	21.7	18.0	18.9	17.2	56.6	16.7	11.4
Portugal	20.5	21.4	21.4	22.0	22.3	22.0	22.0	20.8	17.3	17.5	17.2	59.4	17.9	7.3
Slovak Republic	6.7	6.8	8.8	10.5	9.9	9.4	8.1	7.8	6.4	7.1	5.7	24.6	6.0	4.5
Slovenia	17.0	16.3	16.5	17.8	16.9	17.6	15.7	13.2	11.7	12.6	10.8	59.5	9.7	4.4
Spain	23.4	23.2	24.0	25.2	26.1	26.8	26.9	26.3	24.3	25.7	23.0	68.5	25.3	13.0
Sweden	15.9	16.3	16.8	16.6	16.1	16.1	15.9	15.7	15.8	17.8	13.8	58.1	12.9	6.4
Switzerland	12.8	12.9	13.1	13.7	13.3	13.3	13.1	12.6	12.8	12.4	13.1	52.0	8.7	4.0
Turkey	12.0	11.9	12.9	13.1	13.2	13.2	12.5	11.5	12.2	8.9	13.7	24.9	9.3	16.7
United Kingdom	6.2	6.0	6.3	6.1	5.9	5.6	5.5	5.1	5.1	5.6	4.7	13.5	4.2	3.9
United States	..	..	..	..	..	4.0	..	..	..	3.8	4.1	8.2	3.3	2.9

Source: OECD.stats, Eurostat

data on labor and flexible labor markets.

temporary employment

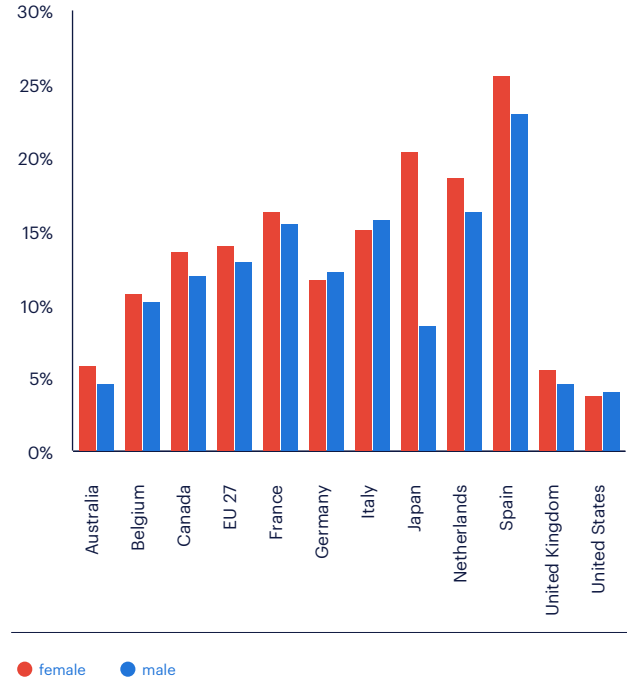
share of dependent employment, age 15 to 64, 2020q3 (Australia, Canada, US 2017, Japan 2013)



Source: Eurostat, OECD.stats

temporary employment by gender

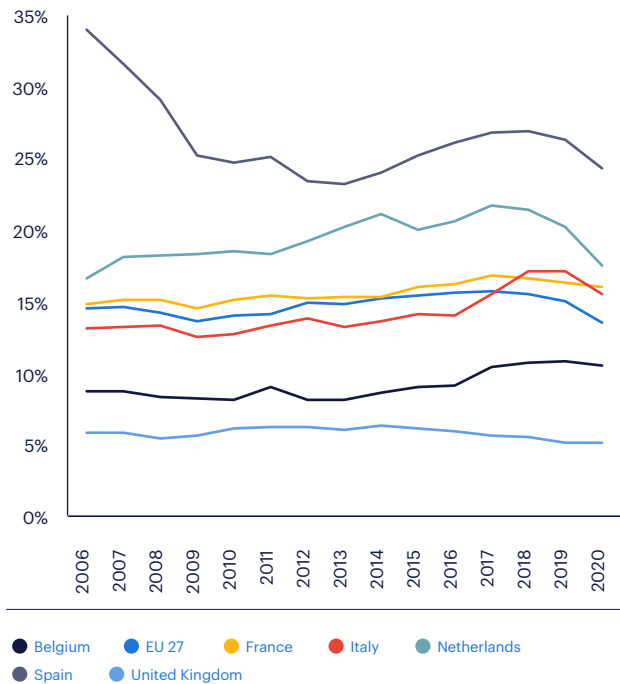
share of dependent employment, age 15 to 64, 2020q3 (Australia, Canada, US 2017, Japan 2013)



Source: Eurostat, OECD.stats

temporary employment

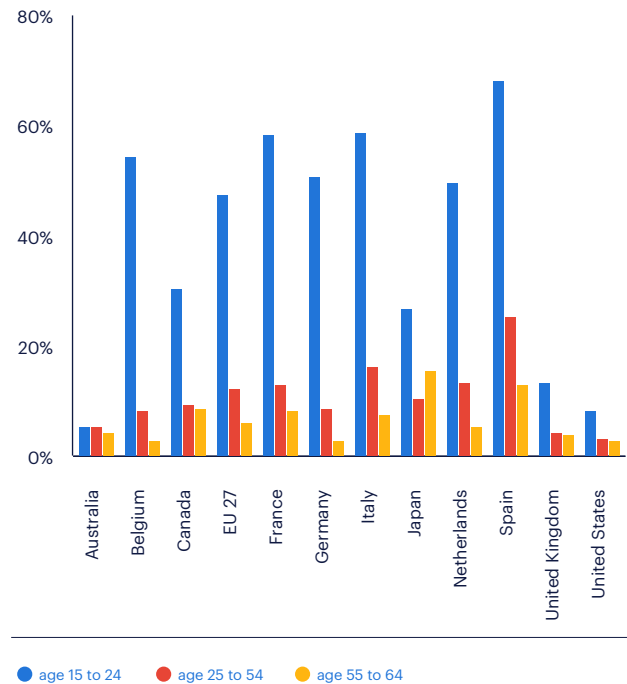
share of dependent employment, age 15 to 64



Source: Eurostat

temporary employment by age group

share of dependent employment, 2020q3 (Australia, Canada, Japan 2017)



Source: Eurostat, OECD.stats

## data on labor and flexible labor markets.

## agency work

share of agency work in total employment

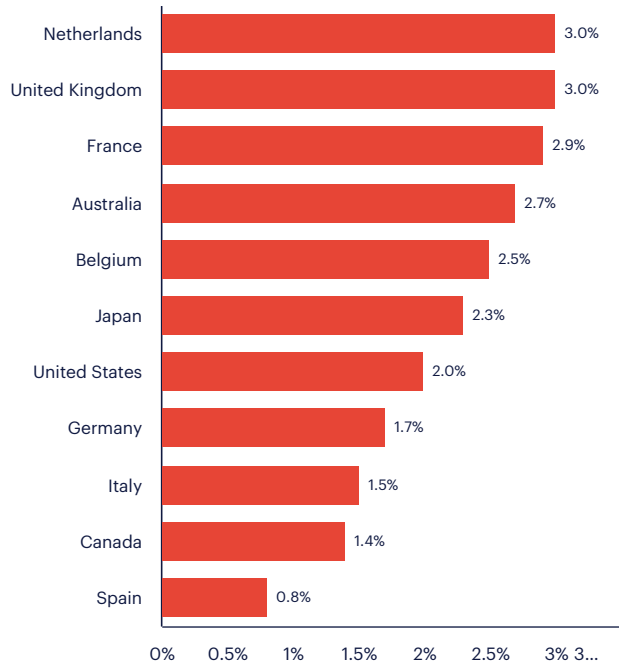
	year													
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Australia	..	..	..	2.9	2.7	2.8	2.9	2.9	3.7	3.6	..	2.7	2.7	2.7
Austria	1.5	1.7	1.7	1.4	1.6	1.8	1.9	1.8	1.6	1.8	..	1.8	2.0	1.7
Belgium	2.1	2.2	2.1	1.6	1.8	2.0	1.9	1.8	2.0	2.2	2.4	2.5	2.5	2.5
Canada	..	..	..	..	0.6	0.6	..	..	..	0.7	..	1.2	1.4	..
Chile	..	..	..	0.4	0.5	0.3	..	..	..	0.5	..	..	..	0.5
Colombia	..	..	..	..	..	..	..	..	..	..	..	..	..	1.5
Czech Republic	..	..	0.7	0.7	0.7	0.7	0.9	0.9	0.9	0.9	..	0.7	0.7	0.8
Denmark	0.7	0.7	0.8	0.5	0.5	0.5	0.5	0.6	0.7	0.8	0.7	0.9	0.8	0.4
Estonia	..	..	..	..	0.5	0.6	0.6	0.6	0.7	0.6	0.5	0.6	0.6	0.6
Finland	0.7	1.1	1.3	0.8	0.9	1.3	1.2	1.1	1.2	1.5	..	1.6	1.6	1.6
France	2.4	2.5	2.3	1.7	2.0	2.2	2.0	2.0	2.0	2.1	2.2	2.6	2.9	2.9
Germany	1.6	1.9	2.0	1.6	2.0	2.2	2.2	2.1	2.1	2.4	2.4	1.9	2.4	1.7
Greece	..	0.2	..	0.1	0.1	0.1	0.2	0.2	0.2	0.1	0.1	0.3	0.5	0.5
Hungary	1.4	1.4	1.4	0.6	1.8	..	..	2.3	..	2.6	..	..	..	0.2
Ireland	1.5	1.7	1.7	0.9	1.9	2.5	1.4	..	1.4	..	..	..	2.2	2.1
Italy	0.8	1.0	0.9	0.7	0.9	1.0	0.9	1.2	0.9	1.2	1.3	1.2	1.6	1.5
Japan	1.9	2.1	2.2	1.7	1.5	1.5	1.4	2.0	2.0	2.0	2.0	2.4	2.0	2.3
Latvia	..	..	..	..	0.3	0.4	..	..	..	..	0.2	..	..	0.9
Lithuania	..	..	..	..	..	..	..	..	..	..	..	..	..	0.2
Luxembourg	2.6	2.5	2.0	1.8	1.9	..	2.4	2.5	2.6	2.8	3.0	..	..	1.2
Mexico	..	..	..	0.1	0.1	0.3	0.3	0.3	0.3	0.9	..	..	..	..
Netherlands	2.5	2.8	2.9	2.5	2.5	2.6	2.7	2.5	2.7	3.0	3.3	3.3	3.3	3.0
New Zealand	..	..	..	..	..	..	..	..	..	3.3	..	..	1.5	1.4
Norway	1.0	1.0	1.0	0.8	0.9	0.9	1.0	0.9	1.1	1.1	1.1	1.3	1.1	1.0
Poland	0.2	0.4	0.6	0.5	0.7	1.0	1.0	1.2	1.3	1.3	1.2	1.0	1.1	0.9
Portugal	0.9	0.9	1.6	1.6	1.8	1.7	..	..	..	1.8	..	..	..	1.1
Slovak Republic	..	..	0.6	0.6	0.8	..	..	..	..	..	..	..	..	3.1
Slovenia	..	..	0.2	0.2	0.5	..	..	..	..	..	..	..	..	2.8
Spain	0.7	0.7	0.6	0.4	0.5	0.5	0.5	0.5	0.5	0.6	0.7	0.7	0.8	0.8
Sweden	0.8	1.3	1.3	1.0	1.3	1.4	1.3	1.5	1.4	1.5	..	1.1	2.0	2.0
Switzerland	1.5	1.7	1.6	1.3	1.5	1.7	1.7	1.7	1.7	1.8	2.0	1.9	2.0	2.0
United Kingdom	4.4	4.7	4.2	3.7	3.0	3.6	3.8	3.9	3.9	3.8	4.1	5.1	3.4	3.0
United States	2.2	2.1	1.9	1.6	1.9	2.0	2.0	2.1	2.2	2.2	2.1	2.1	2.0	2.0

Source: World Employment Confederation

data on labor and flexible labor markets.

agency work

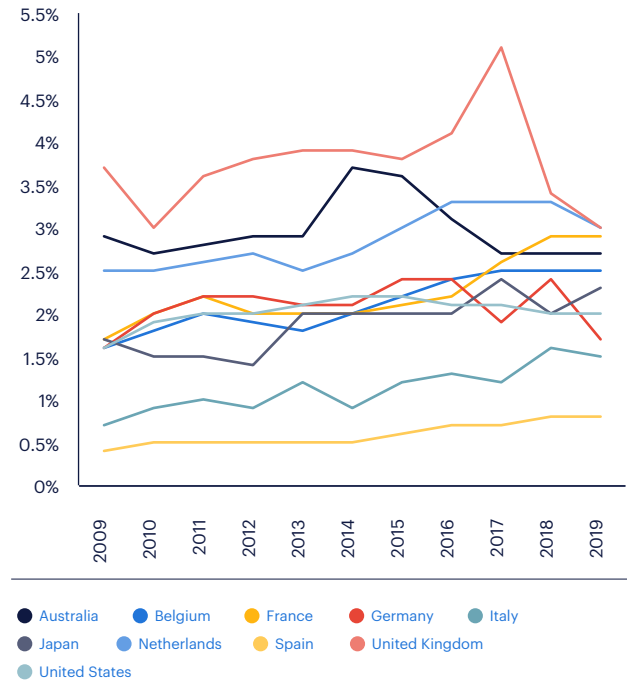
share of total employment, age 15 to 64, 2019



Source: World Employment Confederation

agency work

share of total employment, age 15 to 64, 2019



Source: World Employment Confederation



