

Sectors at a Glance: Coverage of the Global Economic Crisis

Signs of recuperation in the economy are yet to be translated into jobs.

While real GDP started to recover in the third quarter of 2009 in a number of developing and some advanced economies, employment continued to decline globally, particularly in manufacturing, transportation and wholesale & retail trade, albeit at slower pace. Compared to 2008 job losses reached 9 million in manufacturing alone in the third quarter of 2009. Due to the severity of job losses in this, the hardest hit economic sector, recovery here is unlikely to happen soon. Conditions in the construction sector generally remained poor over the same period, mainly due to weak fundamentals in the non-residential buildings sub-sector. Signs of employment deterioration are also emerging in education and public administration. Only a few sectors (financial intermediation and business services) have shown signs of a mild jobs recovery in the third quarter of 2009, while employment continued to grow steadily in the health sector.

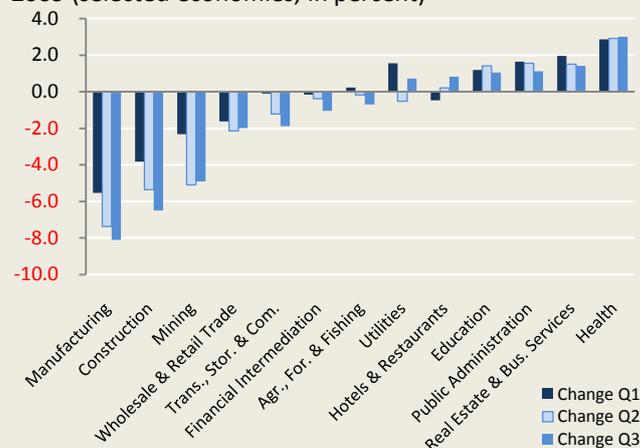
Job losses are unequally distributed across regions and between developed and developing economies.

Overall, employment in the Asian and Pacific region has shown greater resilience in most economic activities than in Europe and the Americas. Similarly, developed countries have lost nearly twice as many jobs as developing/emerging economies. Export-oriented sectors and, to a lesser extent, agriculture were mostly affected in developing countries while manufacturing, wholesale & retail trade and transport lost more jobs in developed economies. Layoffs in construction were widespread across regions and between developed and developing economies.

The path for labour markets to return to pre-crisis levels remains long.

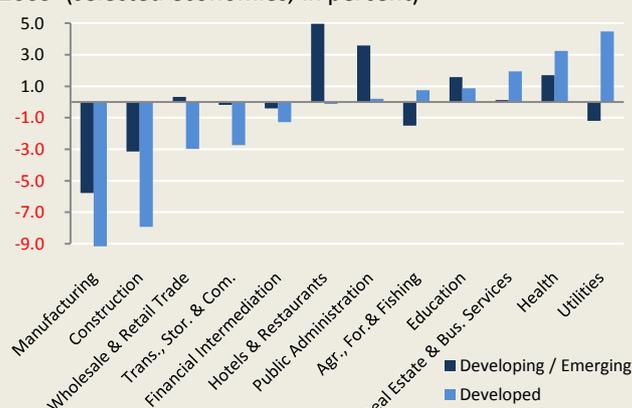
The slowdown in employment declines in the third quarter of 2009 seems to reflect a diminished pace of layoffs as opposed to firms effectively hiring. The data available across sectors suggests that employers expect to meet any near-term increase in demand by raising their existing employees' hours of work and boosting productivity, thus delaying the need to add employees. Employers remain cautious and unless the fundamentals of the economy substantially improve, the job recovery is likely to be slower, relative to past recessions.

Employment Change by Economic Activity from 2008 to 2009 (selected economies, in percent)



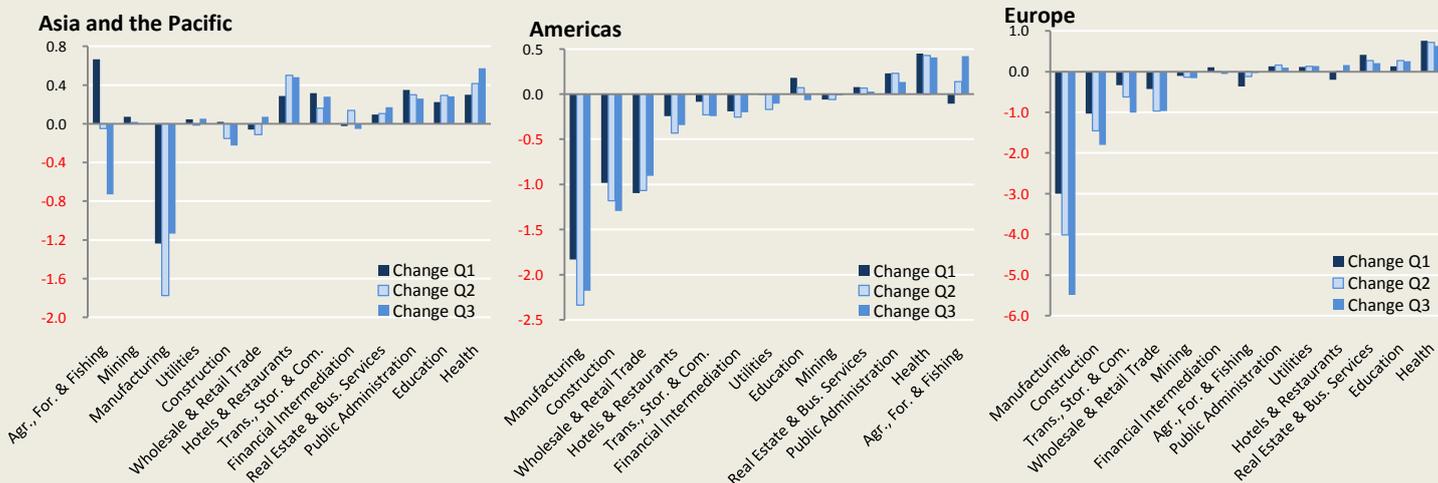
Source: ILO based on National Labour Force Surveys, Eurostat and official estimates of 56 countries.

Employment Change by Economic Activity in Developed and Developing / Emerging Economies from Q3 2008 to 2009 (selected economies, in percent)



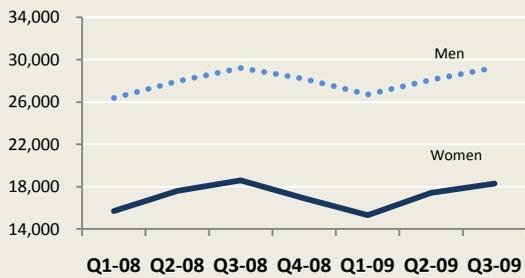
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Employment Change by Economic Activity from 2008 to 2009 (selected economies, in millions)



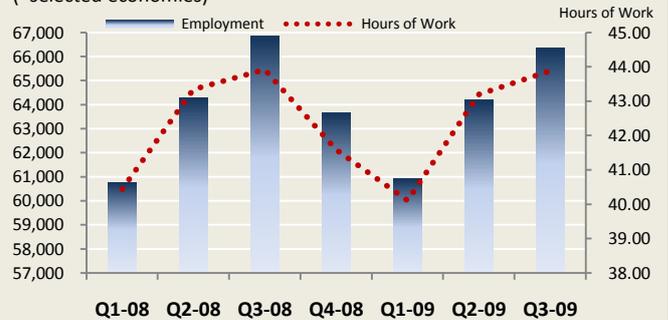
Agriculture, Forestry & Fishing

Employment by Sex (*selected economies, in thousands)



Source: ILO based on National Labour Force Surveys and official estimates. Data for EU countries are provided by Eurostat. *Selected Economies: Australia, Austria, Barbados, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, Jamaica, Japan, Rep. of Korea, Latvia, Lithuania, Mexico, Netherlands, New Zealand, Poland, Portugal, Romania, Slovakia, Slovenia, South Africa, Spain, Sri Lanka, Sweden, Taiwan (China), Thailand, Turkey, and United Kingdom.

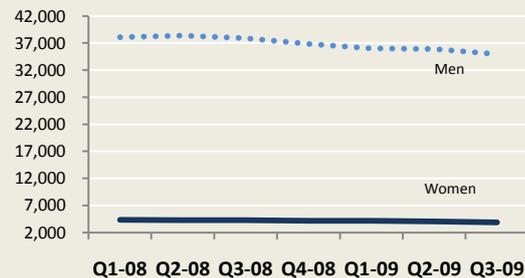
Employment (in thousands) & Average Weekly Hours of Work (*selected economies)



Source: ILO based on National Labour Force Surveys and official estimates. Data for EU countries are provided by Eurostat. *Selected Economies: Australia, Austria, Barbados, Belgium, Bulgaria, Chile, Colombia, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Jamaica, Japan, Rep. of Korea, Latvia, Lithuania, Luxembourg, Malaysia, Malta, Mexico, Netherlands, New Zealand, Norway, Philippines, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, South Africa, Spain, Sri Lanka, Sweden, Taiwan (China), Thailand, Turkey, United Kingdom and Venezuela.

Construction

Employment by Sex (*selected economies, in thousands)



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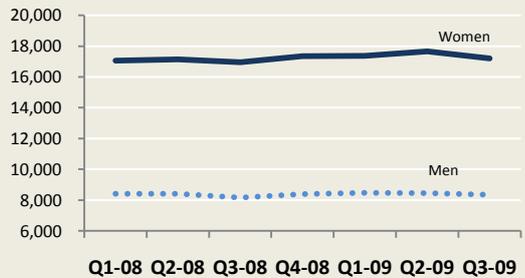
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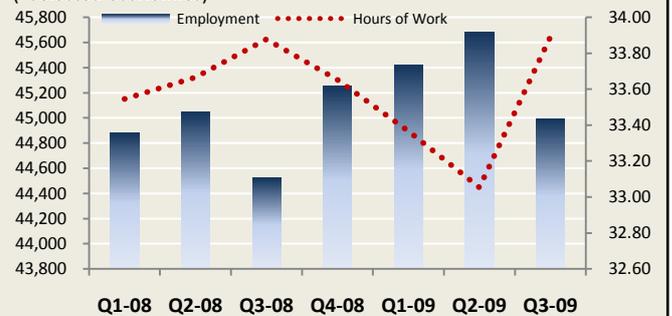
Education

Employment by Sex (*selected economies, in thousands)



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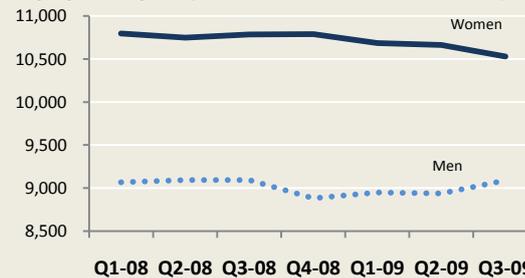
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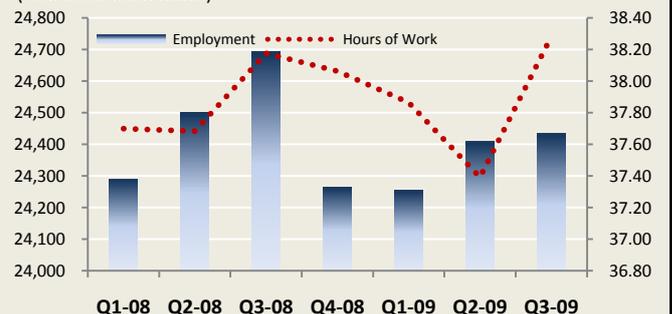
Financial Intermediation

Employment by Sex (*selected economies, in thousands)



Source: ILO based on National Labour Force Surveys and official estimates. Data for EU countries are provided by Eurostat. *Selected Economies: Australia, Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong (China), Hungary, Iceland, Ireland, Israel, Italy, Jamaica, Japan, Luxembourg, Macau (China), Malta, Netherlands, New Zealand, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, South Africa, Spain, Sweden, Switzerland, Taiwan (China), Thailand, United Kingdom and United States.

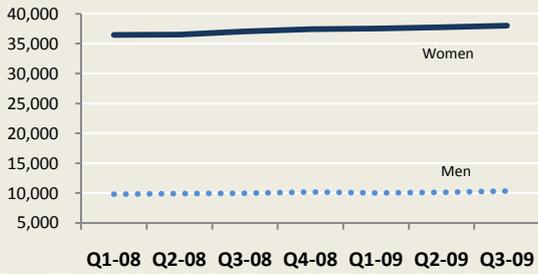
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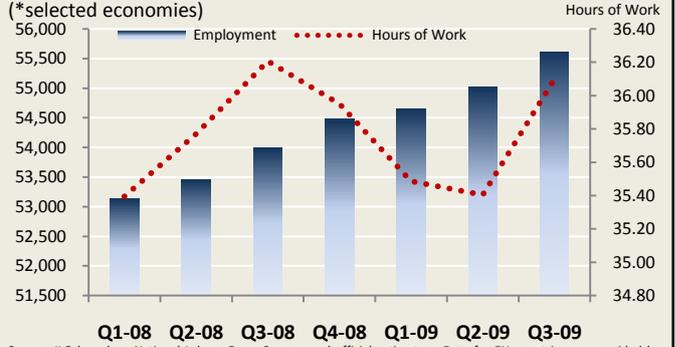
Health

Employment by Sex (*selected economies, in thousands)



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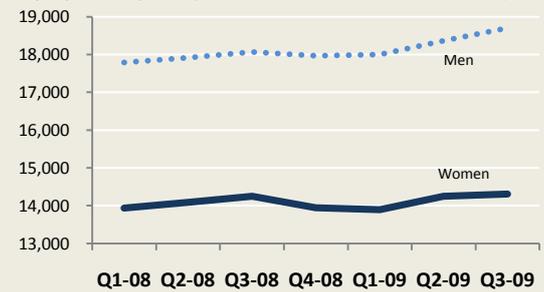
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Hotels & Restaurants

Employment by Sex (*selected economies, in thousands)



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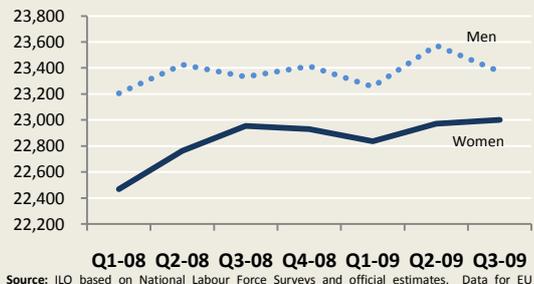
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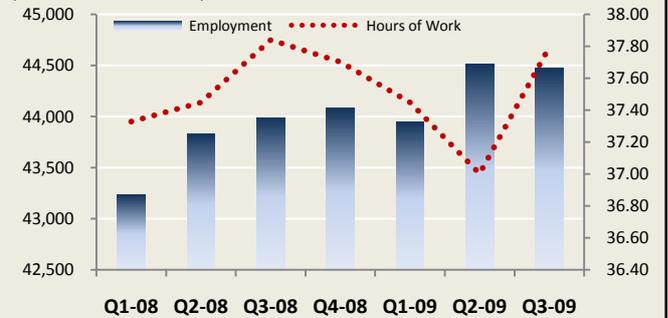
Public Administration

Employment by Sex (*selected economies, in thousands)



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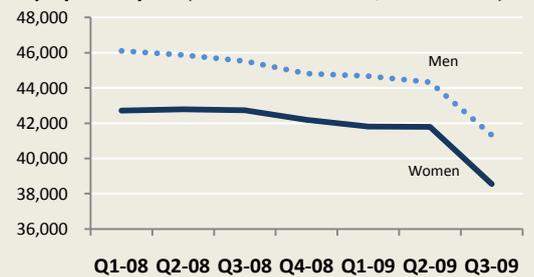
Employment (in thousands) and Average Weekly Hours of Work



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Wholesale & Retail Trade

Employment by Sex (*selected economies, in thousands)



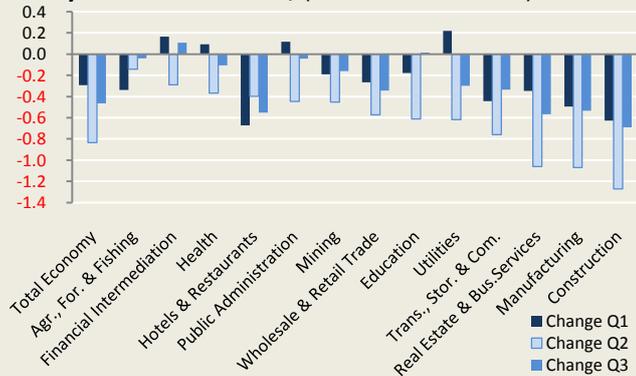
Source: ILO based on National Labour Force Surveys and official estimates. Data for EU countries are provided by Eurostat. ***Selected Economies:** Australia, Austria, Barbados, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hong Kong (China), Hungary, Iceland, Ireland, Israel, Italy, Jamaica, Japan, Latvia, Lithuania, Luxembourg, Macau (China), Malta, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, South Africa, Spain, Sri Lanka, Sweden, Switzerland, Taiwan (China), Thailand, United Kingdom and United States.

Employment ('000s) and Average Weekly Hours of Work



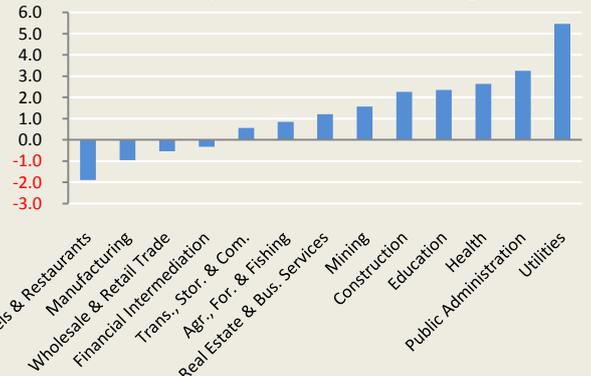
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Change in Average Weekly Hours of Work by Economic Activity from 2008 to 2009, (selected economies)



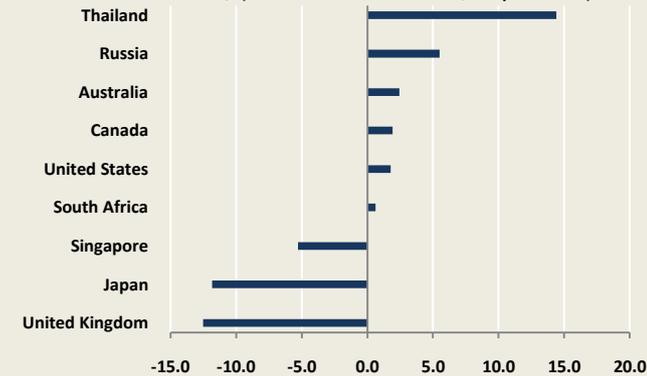
Source: ILO based on National Labour Force Surveys, Eurostat and official estimates of 37 countries.

Average Change in Wages by Economic Activity from Q1:Q3 2008 to 2009, (selected economies, in percent)



Source: ILO based on National Labour Force Surveys and official estimates of 9 countries.

Change in Average Wage in Financial Intermediation from Q1:Q3 2008 to 2009, (selected economies, in percent)

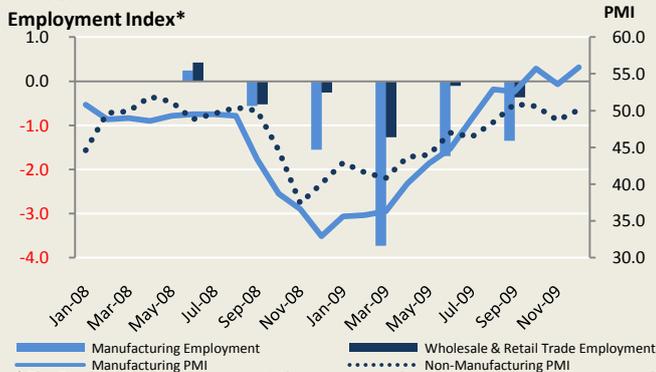


Source: ILO based on National Labour Force Surveys and Official Estimates of each Country.

Concerns remain about the economy's ability to generate a self-sustaining recovery without government support.

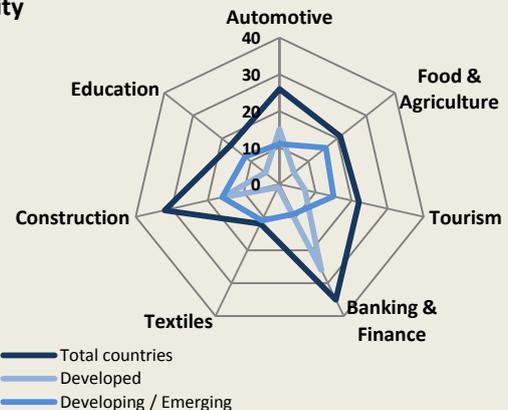
While significant macroeconomic policy measures helped to stabilize financial markets and temporarily improve consumer spending and industrial production, the fundamentals of the economy are still fragile. Industrial capacity utilization is very low, trade continues below pre-crisis levels and lending to small businesses and households remains tight. The forthcoming expiration of several fiscal incentives and an early withdrawal of other stimulus measures may jeopardize some of the early gains of the stimulus unless private sector consumption and investment responds promptly to the pickup in activity.

Production & Employment Change in Manufacturing & Services



* The Employment Index represents the percentage change in employment as compared to the previous quarter. Source: JP Morgan PMI and ILO based on national Labour Force Surveys, Eurostat and official estimates.

National Stimulus Plan Measures by Targeted Economic Activity



Source: ILO based on National Stimulus Plans.

Social Dialogue in Response to the Global Downturn

The crisis re-emphasized the role of tripartite consultations and collective bargaining as central for the design of recovery strategies. In many countries existing social dialogue mechanisms and tripartite consultations led to a wide range of sectoral anti-crisis arrangements in both the private and public sectors, from the promotion of work-sharing schemes, training opportunities and enhanced social protection, to providing support for enterprise sustainability, and the creation of jobs through public infrastructure programmes. Social dialogue was not always successful, however when institutions and the political will were in place, it played a critical role in reducing the social and economic burden on workers and enterprises.

Job Centres in the Cambodian Garment Sector

The crisis had a dramatic impact on the garment industry. Manufacturers, unions and the government engaged with Better Factories Cambodia in a joint effort for implementing 9 job centres in Phnom Penh as a crisis-related training programme for laid-off workers. These job centres have a strong connection with employers, and their objectives are shared by the Garment Manufacturers' Association in Cambodia (GMAC). Unions are also deeply involved in their functioning, as they are directly in touch with potential clients who have lost their jobs, and facilitate the communication between laid off workers and potential new employers.