

Audizione Commissione
Lavoro, Previdenza Sociale,
Senato della Repubblica
31 Maggio 2017

UTURE OF WO

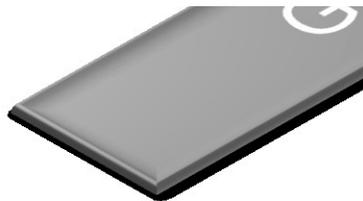
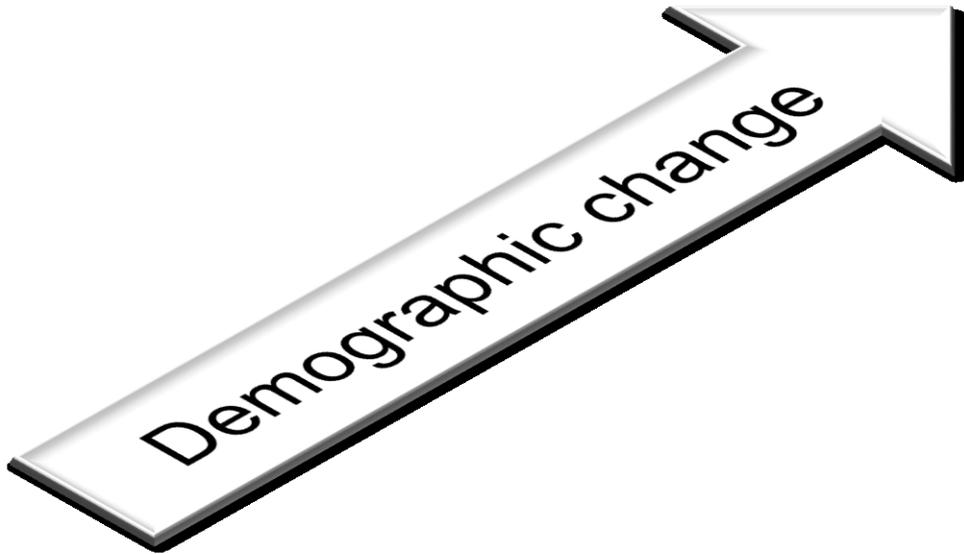
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OECD



The mega-trends shaping the future of work



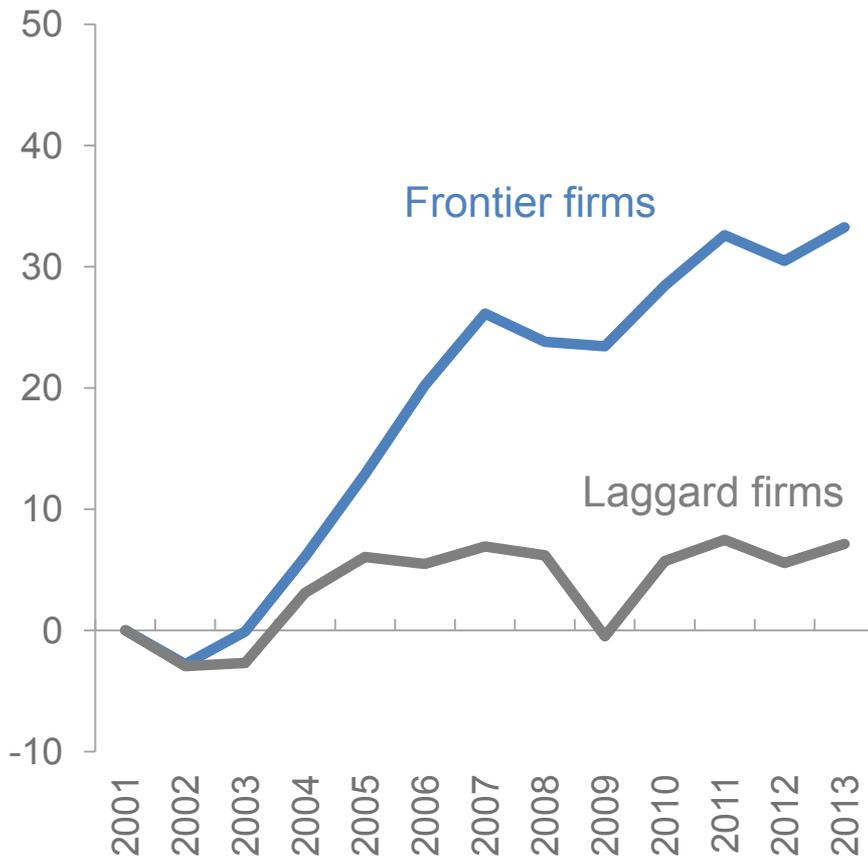




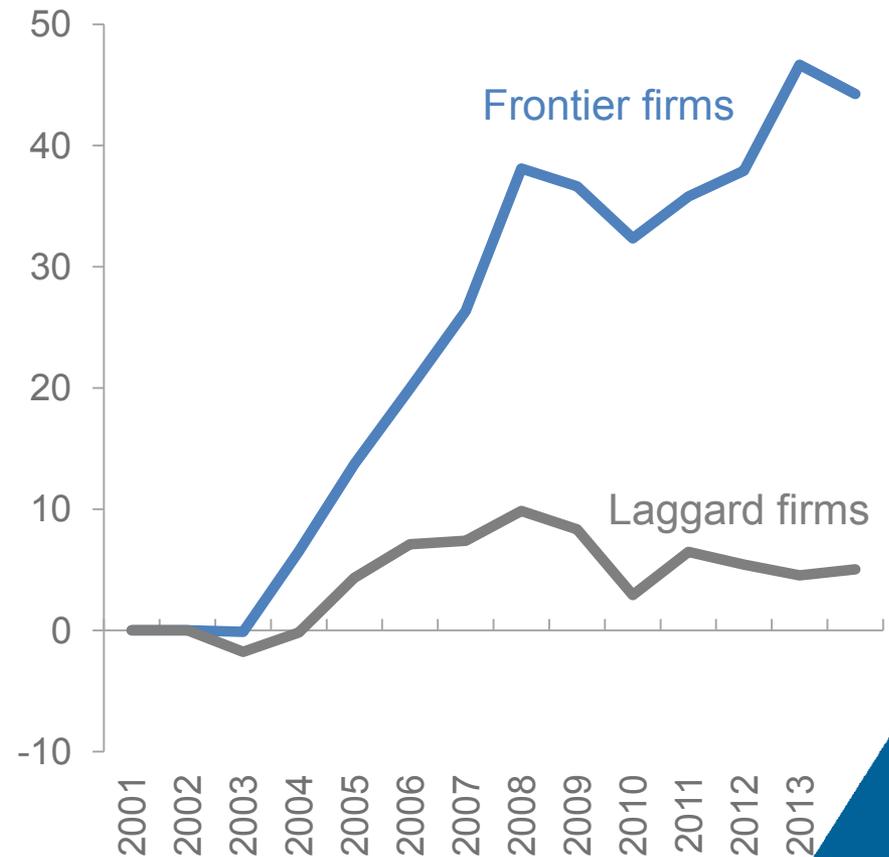
Winners take all : The productivity gap between the globally most productive firms and other firms has widened

Labour productivity: value added per worker, 2001-2013

A. Manufacturing



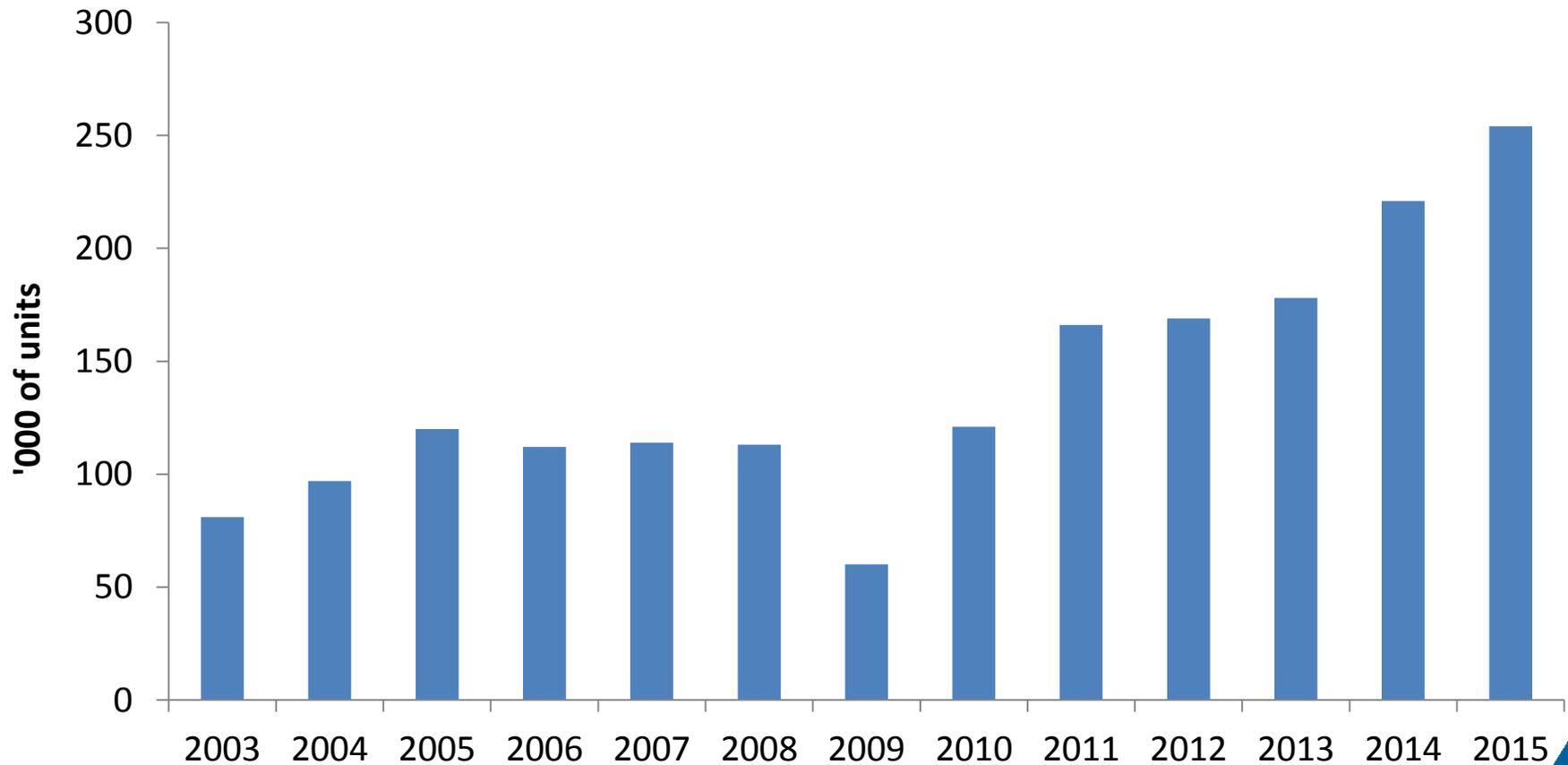
B. Services





And the robots are marching on

Estimated worldwide annual supply of industrial robots



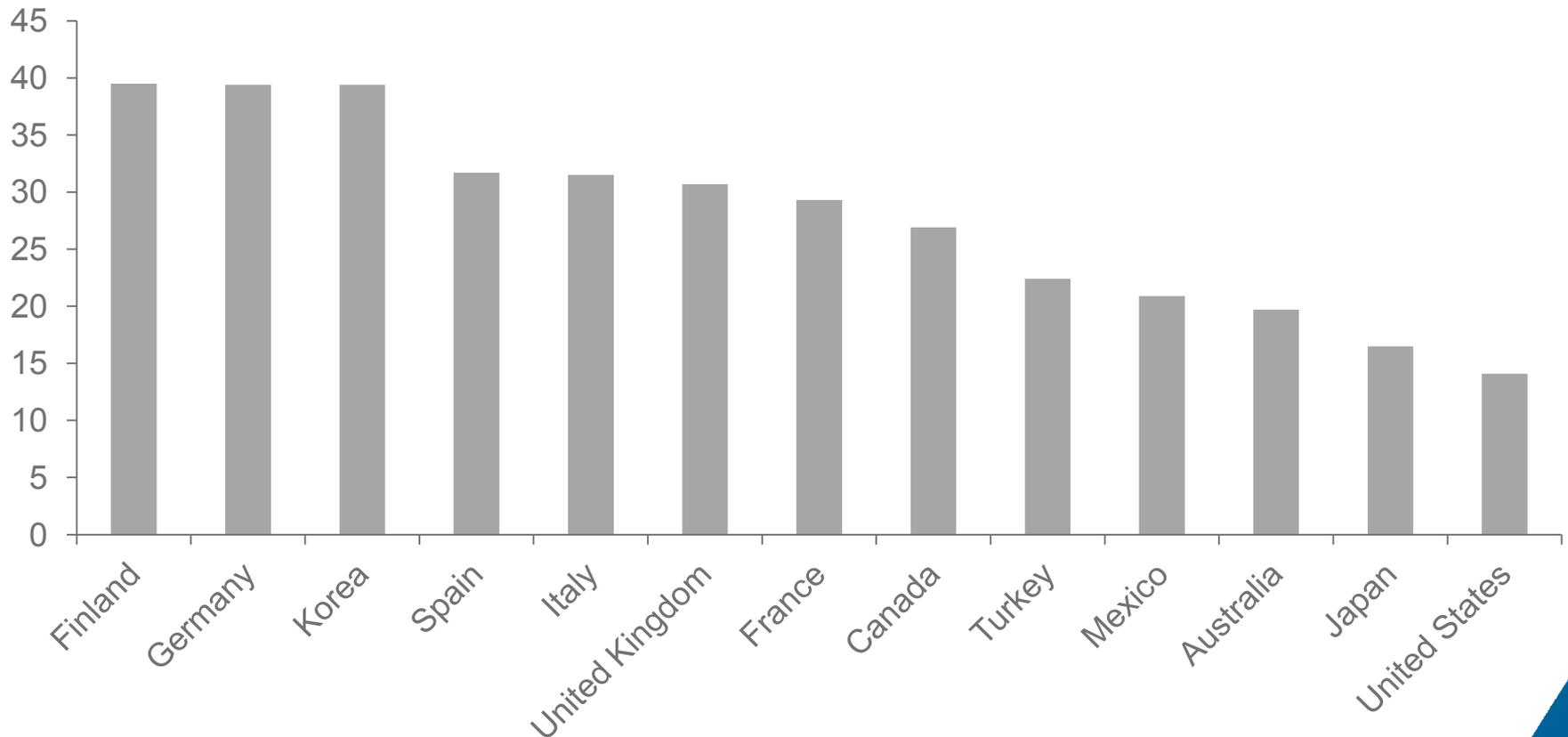


Jobs are also changing

Many jobs depend on demand from abroad

Jobs in the business sector sustained by foreign final demand

As a percentage of total business sector employment





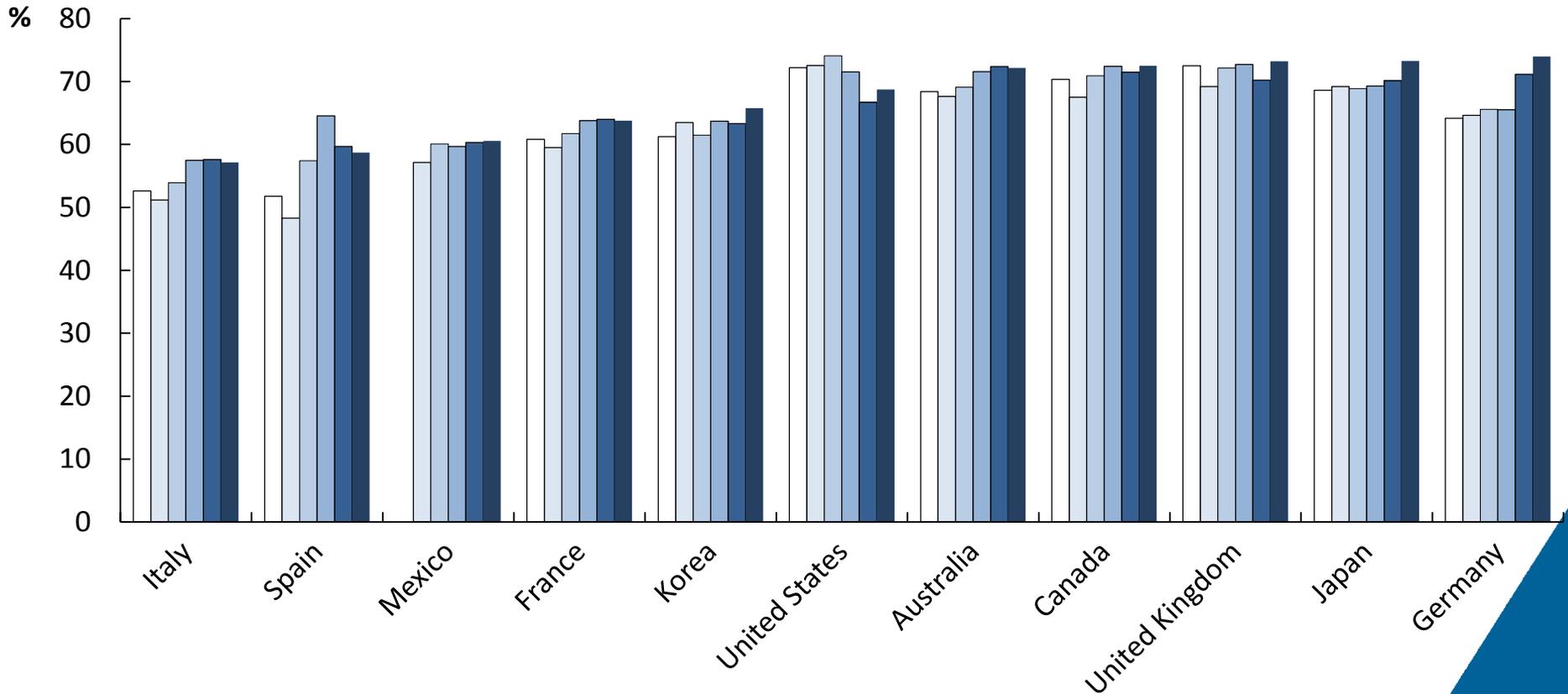
No evidence of technological unemployment...

Employment rates have risen in most advanced countries

Trend in employment-to-population ratio

Percentage of the working-age population, 1990-2015

□ 1990 □ 1995 □ 2000 □ 2005 ■ 2010 ■ 2015 (↗)

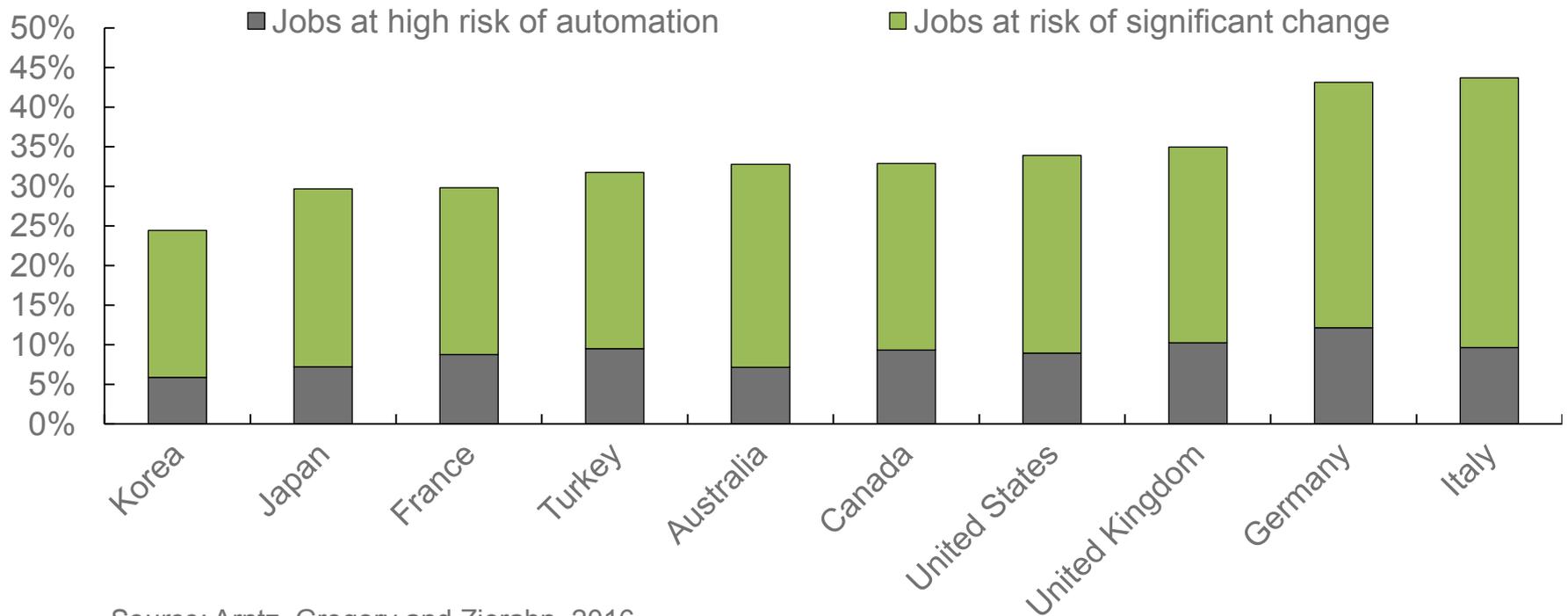






Going forward, fears about massive technological unemployment are exaggerated

9% of jobs are at high risk of automation in G20 countries



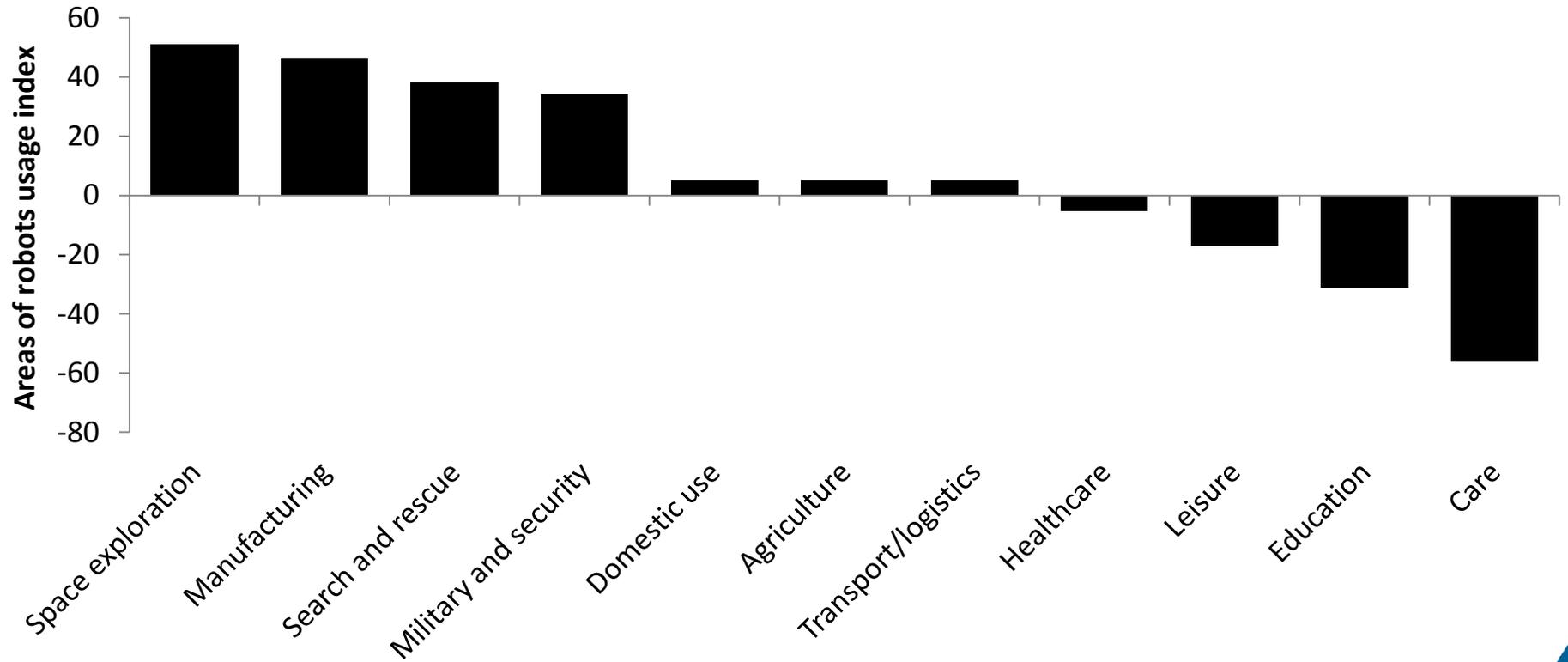
Source: Arntz, Gregory and Zierahn, 2016.

However, many jobs are likely to experience significant change



The adoption of new technology is not inevitable

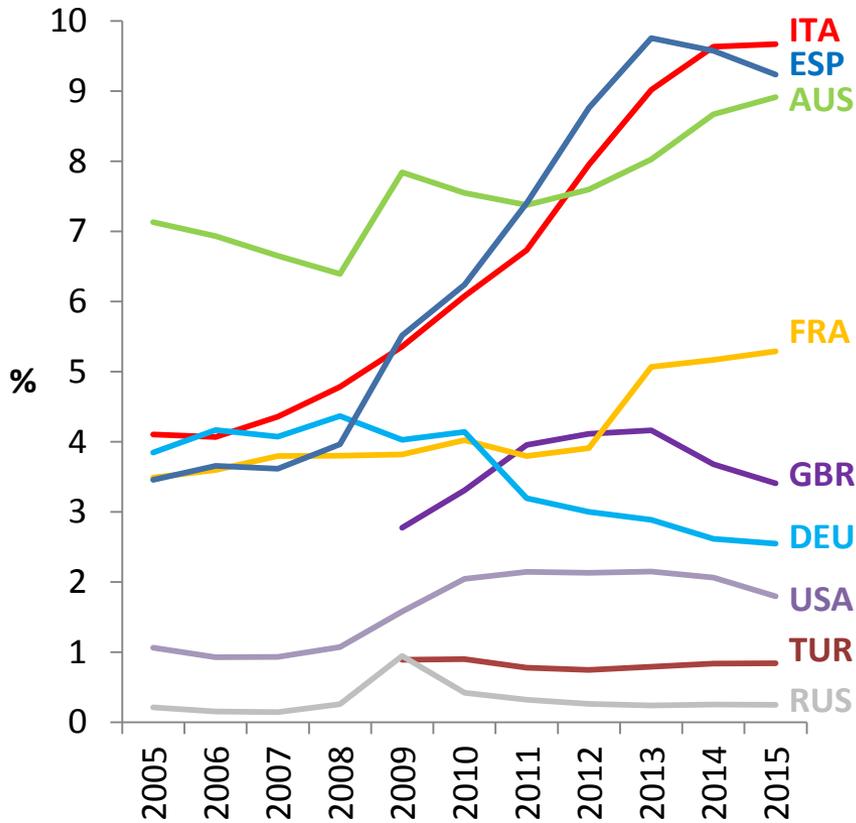
In which areas is the application of robots most/least acceptable?



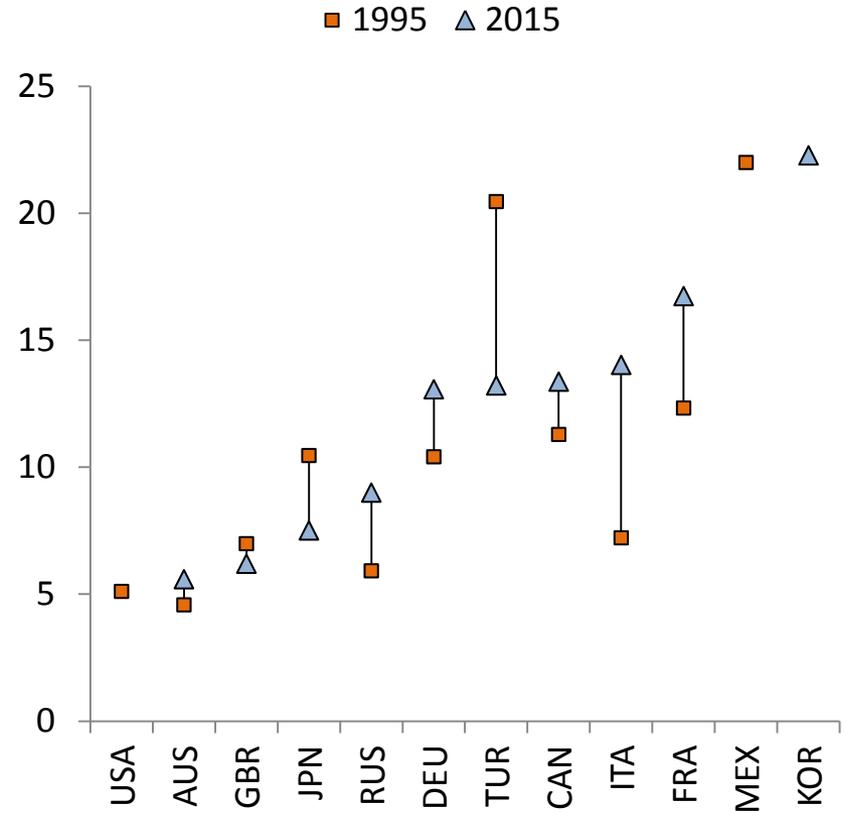


In some countries, non-standard work is on the rise

Share of involuntary part-time workers
(as a share of total employment)



Share of temporary employment
(as a share of dependent employment)

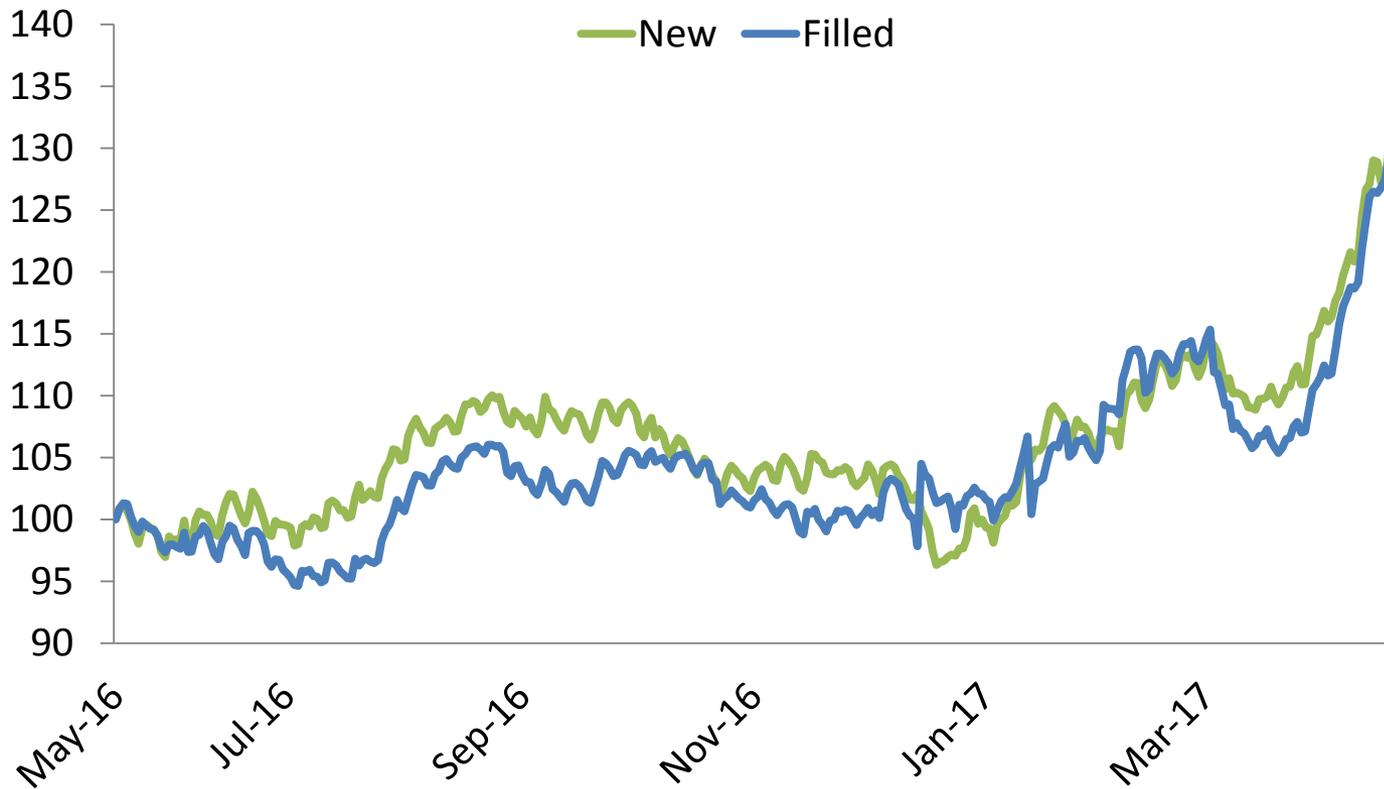




Technological progress promotes the emergence of new forms of employment

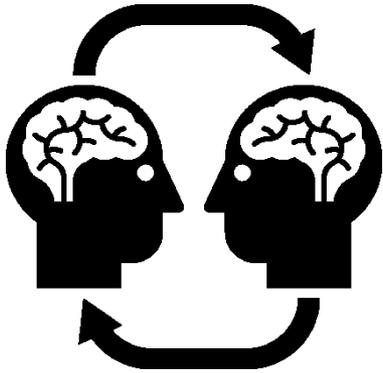


New and filled platform vacancies, May 2016 to May 2017
28-day moving average, May 2016=100





What policy response?



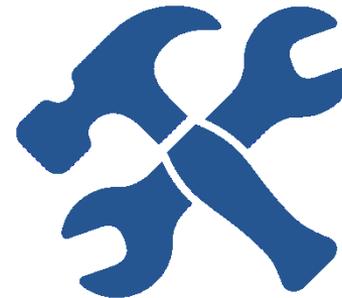
Skills



Social protection



Social dialogue



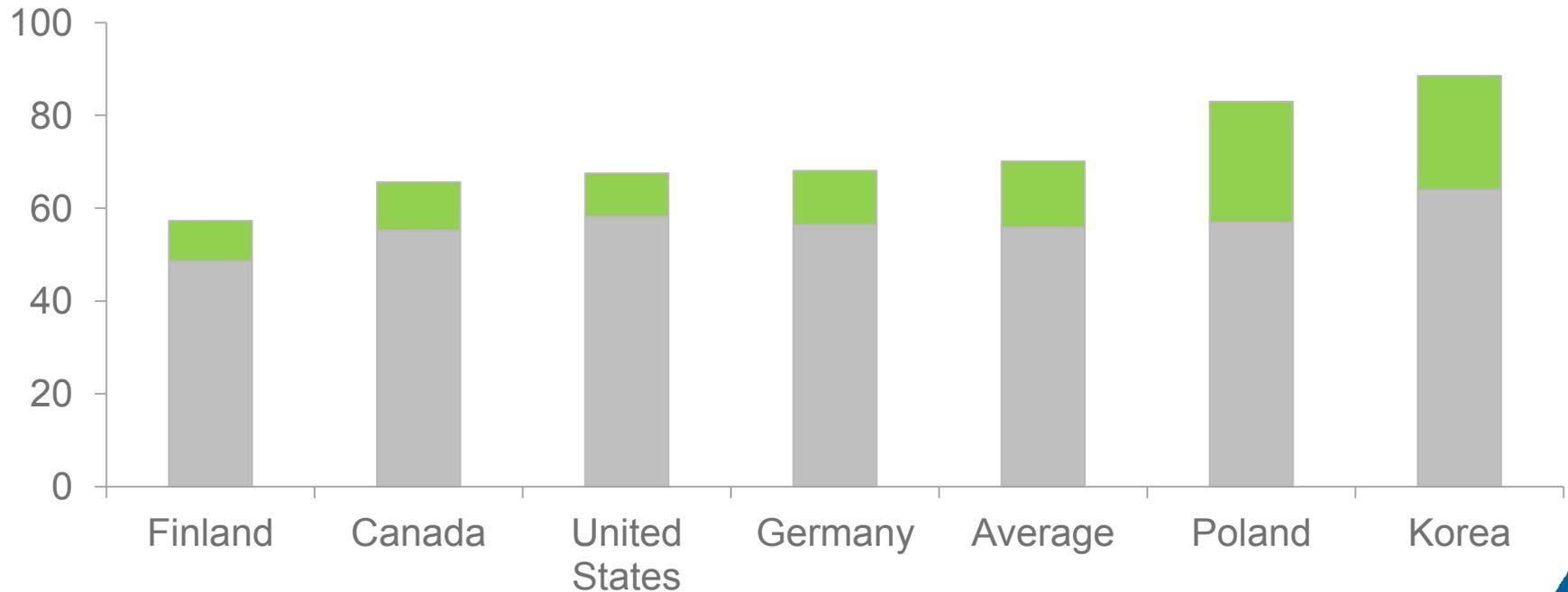
Activation



Many workers do not have the right skills for the new jobs

Problem-solving skills in Technology-Rich Environments *Percentage of the working-age population (aged 15/16-64)*

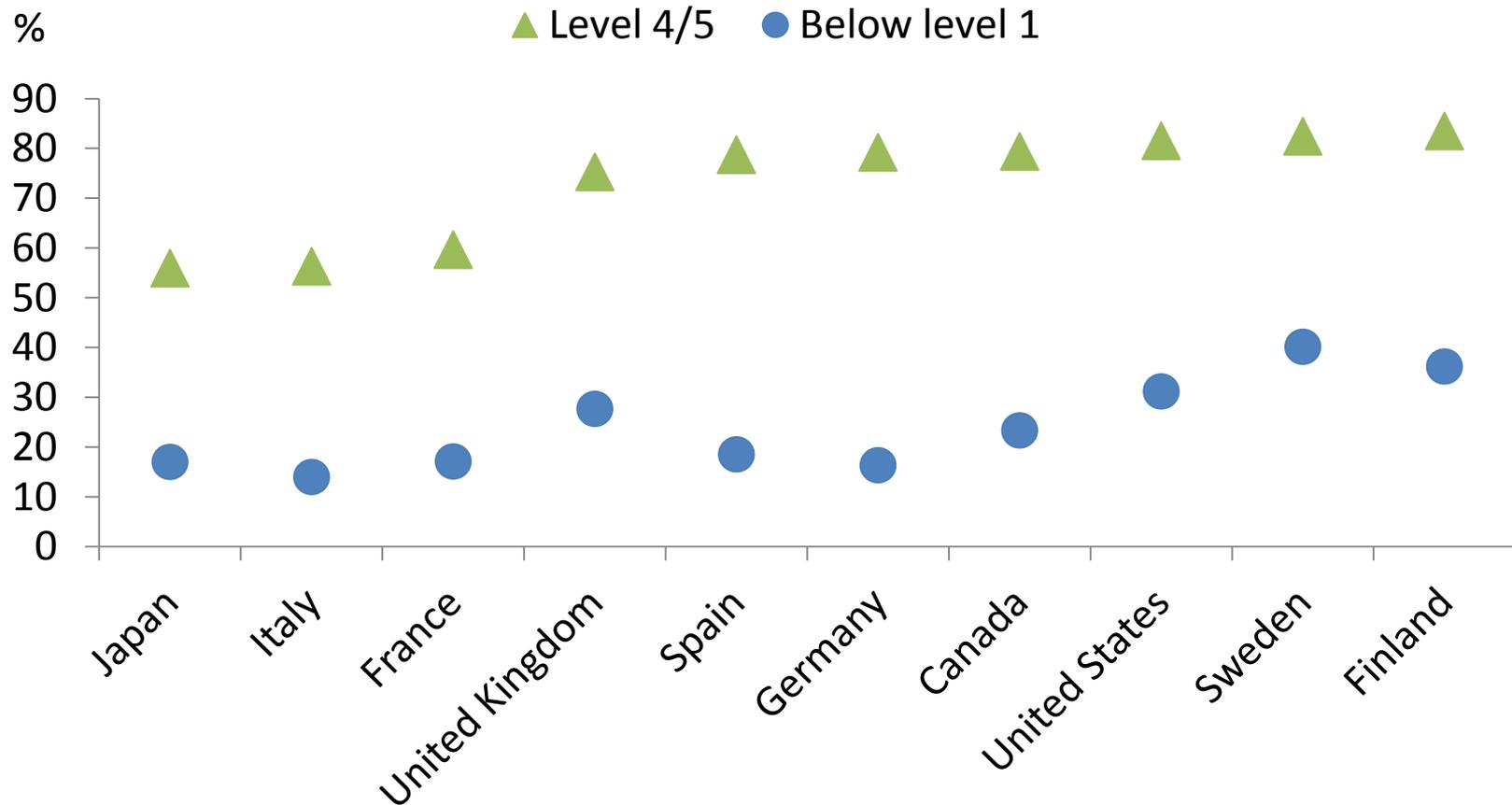
- Lacks basic skills to fulfill simple tasks (Level 1 or below)
- Failed ICT core or had no computer experience





The least skilled benefit less from training

Percentage of adults who participated in adult education and training during year prior to the survey, by level of literacy proficiency





Benefit rules for the self-employed are different from those of standard workers

	Old age, disability	Health	Accidents	Unemployment	Family
Australia	No benefit	Optional enrolment	Optional enrolment	Optional enrolment	Optional enrolment
Canada	Optional enrolment	Optional enrolment	No benefit	No benefit	Optional enrolment
Finland	Optional enrolment	Optional enrolment	Optional enrolment	Different rules from standard workers	Optional enrolment
France	Different rules from standard workers	Different rules from standard workers	Different rules from standard workers	No benefit	Optional enrolment
Germany	Different rules from standard workers	No benefit	No benefit	Optional enrolment	Optional enrolment
Italy	Different rules from standard workers	Different rules from standard workers	Optional enrolment	No benefit	Different rules from standard workers
Japan	Different rules from standard workers	Different rules from standard workers	No benefit	No benefit	Optional enrolment
Korea	Optional enrolment				
Mexico	Optional enrolment	Optional enrolment	Optional enrolment	Optional enrolment	No benefit
Netherlands	Optional enrolment	Optional enrolment	Optional enrolment	No benefit	Optional enrolment
Portugal	Different rules from standard workers	Optional enrolment	Optional enrolment	No benefit	Optional enrolment
Turkey	Different rules from standard workers	Optional enrolment	Different rules from standard workers	No benefit	Optional enrolment
United Kingdom	Different rules from standard workers	Different rules from standard workers	No benefit	Different rules from standard workers	Optional enrolment
United States	Different rules from standard workers	Optional enrolment	No benefit	No benefit	Optional enrolment

No benefit
Optional enrolment
Different rules from standard workers
Same rules as the general scheme



The self-employed risk slipping through the net

54.5% The share of self-employed (15-64) in the EU at risk of not being entitled to **unemployment benefits**

37.8% The share of self-employed (15-64) in the EU at risk of not being entitled to **sickness benefits**

46.1% The share of self-employed women (15-49) in the EU at risk of not being entitled to **maternity benefits**



Social protection for non-standard workers: some policy pointers

- Reduce opportunities/incentives for **misclassifying** workers:
 - Reduce large differences in treatment across different forms of work
 - Remove loopholes and ambiguity in regulation
 - Ensure effective enforcement
- Provide **adequate social protection** for all workers:
 - Adapt existing social insurance schemes to extend them to previously excluded categories of workers
 - Make social protection more portable
 - Complement social insurance with non-contributory schemes

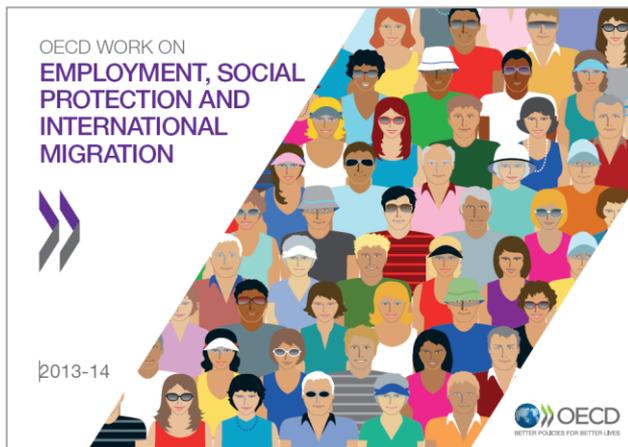


Thank you

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