Flexibility@Work 2013: yearly report on flexible labor and employment

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preface

Randstad is pleased to introduce the first edition of *Flexibility@work: yearly report on flexible labor and employment*. It is the follow-up to the *International Database on Employment and Adaptable Labor*, which was part of the Randstad/SEO Economic Research series *Mind the Gap* (2007), *Bridging the Gap* (2010) and *Into the Gap* (2012).

The Flexibility@work report, the research for which is again conducted by SEO Economic Research, provides a comprehensive overview of international employment trends in the flexible work market. Every year, we emphasize a topical development in the world of flexible work, and the 2013 edition highlights global trends in labor relations; i.e., the share of fixed-term contracts, agency work and self-employment in the total employment market and the possible trade-offs between these different forms of flexible labor.

Over the past decade, the common belief has been that flexible labor relations have surged in popularity worldwide and are, in fact, threatening the position of traditional, open-ended labor contracts. The Flexibility@work 2013 report shows that this is not the case. There is no clear evidence of a worldwide trend towards a growing share of formal flexible labor relations over the last decade. Nor is there any evidence of a trade-off between different forms of flexible labor.

Flexibility@work 2013 demonstrates that the way in which specific forms of flexible labor relations develop depends on the specific demands of the various national labor markets, and therefore varies widely. These demands may be related to the need for innovation, the rise or decline of certain economic sectors, or the economic cycle, to name just a few possible influences. This is especially true for agency work, which remains a small part of all flexible labor relations, but the demand for which seems to be structurally increasing.

As already observed in *Into the Gap*, skills mismatches will be an increasing challenge on the global labor market in the coming years. Better transitions and higher mobility on the labor market will help to address this challenge. Agency work plays a key role in facilitating such transitions and mobility, in that it brings workers from education to work, from unemployment to work, and from non-participation to work.

With our mission of ‘shaping the world of work’, Randstad understands the importance of having a thorough knowledge of all of the current and future labor markets in which we provide our HR services. A flexible workforce has proven to increase productivity and improve competitiveness. Complementary to our existing knowledge of local markets, this annual publication is therefore a welcome addition to Randstad’s knowledge base.

Ben Noteboom
CEO Randstad Holding NV

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1 abstract

There is no clear evidence that the strong growth in the share of flexible labor relations between 2002 and 2007 points at a worldwide trend towards a larger share of flexible labor at the expense of traditional open-ended labor contracts. The growth in flexible labor varies too much between countries and periods to draw such a conclusion. In most countries in Europe, in North America and Japan, the share of flexible labor has declined during the recent economic recession that started after 2007.

There is also no structural trade-off between different forms of (formal) flexible labor. Observations in Europe suggest that growth or decline of different types of flexible labor can be attributed to changes in both local societal and economic structures and in institutions and legislation. Growth of flexible labor appears mainly in countries where the labor participation is increasing while it is declining where labor participation is relatively low or stagnating. This suggests an important role for flexible labor for new non-traditional labor market participants to enter the labor market.

At the same time, there is a strong correlation between the share of flexible labor and economic growth, particularly with respect to fixed-term contracts and agency work. Flexible labor is the first form of employment affected by a decline in labor demand in an economic crisis, particularly when flexible workers are younger and lower educated. But at the same time, flexible work will be the first type of employment that recovers when the economy stabilizes after a crisis. The opportunity to offer flexible work may even accelerate economic growth. Therefore, a further growth in flexible work can be expected once the economies in most western countries start to grow significantly again. In particular agency work, though forming only a small part of all flexible labor relations, has shown a structural growth beyond the regular business cycle.

2 flexible labor and economic growth

In a world with increasing globalization, increasing trade among nations and increasing competition, there is a need for more flexibility in the labor market. Economic growth does not result from producing more of the same, but from changing production methods and developing new products and services. Each innovation destroys the economic value of old products, services or techniques it replaces. Since economic growth is more and more driven by knowledge and innovation, businesses only survive if they are able to periodically renew their products and raise their productivity by improving their production methods. This has implications for the type of labor demand. New products and production methods require an adjustment of production factors, including human capital, leading to new professions and new skills. Product innovations of existing products and techniques (sustaining innovation) basically need high quality workers who have invested in their knowledge and skills during a long-term labor relation with their employer (firm-specific human capital). Novel innovations in terms of completely new products and techniques (disruptive innovation) need new and creative workers and sometimes require quick changes in the size and skills of the workforce.

Flexible labor relations enable companies to quickly adjust the size and composition of their workforce when innovations change their product lines and production methods. These flexible labor relations also enable companies to screen workers with respect to their productivity and creativity before adding them to their more permanent workforce. Through this way of matching, long-term labor relations become more efficient to the employer. If flexible labor relations are used to support innovation processes and optimize the quality of the workforce, it enables further economic growth.

Although the traditional open-ended labor contract is still the standard labor relation, many other forms of more flexible labor relations have developed over the last decades. These other forms of labor relations vary in the type of flexibility: flexibility in the duration of the contract (fixed-term contracts), flexibility in the company people work for (e.g. triangular labor relations such as agency work), and flexibility in the labor relation (e.g. self-employed workers). For that reason, all these other types of contracts can be interpreted as flexible labor contracts as opposed to the traditional open-ended labor contract with a direct employer.[1] Table 2.1 elaborates on the exact definitions of the different types of flexible labor in this report.

The last decade has shown considerable growth in the share of fixed-term contracts, both in a number of more recent member-states of the EU such as Poland and Hungary, as in more traditional member-states like the Netherlands, Italy and Ireland. There has also been considerable growth in

1 This report focuses on external labor flexibility, internal labor flexibility such as a variable number of working hours, job rotation and on-call contracts is not discussed explicitly.

the share of agency work in upcoming economies like South Africa, Brazil and Poland, and in the share of self-employed workers in important European economies such as Germany, France and the United Kingdom. All these developments suggest a correlation between flexible labor relations and economic growth.

Economic growth may increase the need for additional flexible labor when an increase in consumption is first expected to be temporary, or when more permanent workers with the right skills are not yet available. However, the additional supply of flexible labor may also enable higher economic growth through innovation, the development of new production methods and by reducing production costs. Rules and regulations that enable or restrict the use of different types of flexible contracts may play an important role in that process.

Table 2.1 Definitions of formal labor relations used in this report

labor relation	definition
Open-ended contract	Employment contract of unspecified duration, the term of the contract is not fixed. The contract does not have to be in any specified form.
Flexible labor	All forms of labor that enables the external numerical adjustment of the labor intake by employers. This can be achieved by employing workers on fixed-term contracts, hiring workers through temporary employment agencies or by hiring labor services from self-employed workers.
Fixed-term contract	Employment contract of which the end is determined by objective conditions, such as a specific date, the completion of an assignment, or the return of an employee who is temporarily replaced. Typical cases include: people in seasonal employment, people engaged by an agency or employment exchange and hired to a third party to perform a specific task (unless there is a written open-ended work contract), and people with specific training contracts.
Agency work	Employment where a worker is employed by a temporary work agency, and then hired out to perform his/her work at (and under the supervision of) the user company. The employment contract is mostly of limited or unspecified duration but can be open-ended.
Self-employed	Self-employed persons work in their own business, farm or professional practice, producing products or services for the market, including labor services.

The main questions that are answered in this report are:

- Do developments with respect to flexible labor in recent years point at a worldwide trend towards a larger share of flexible labor, replacing the more traditional open-ended labor contract?
- Is there a trade-off between different forms of flexible labor that may disguise a structural trend in the growth of flexible labor?

The report starts with an analysis of the development of total flexible labor. Next, the development of a number of different types of flexible labor is analyzed separately to identify worldwide trends. All analyses are illustrated by tables and figures with the most important trends. Other statistics that are mentioned in the text can be found in the Appendices. The analyses result in an answer to the question whether the growth in flexible labor is a worldwide trend seems inevitably to be the result of an increase in globalization, international competition and technological development.

3 growth in flexible labor over time

Data on the share of flexible labor relations are taken from four different sources: the Labor Force Survey (LFS) from Eurostat with focus on European countries, similar data from the OECD for OECD-member-states, additional information from tertiary sources such as the International Labor Organisation (ILO), and the Ciett database for international data on agency work. Since the comparability of definitions, frequencies and data collection methods for these sources is limited, the analysis of 'worldwide' trends mainly focuses on the United States, Canada, Japan and Europe. Within Europe, six different regions with specific market structures are distinguished, as described in Table 3.1 and illustrated in Figure 3.1. The share of flexible labor is expressed in terms of total employment, which includes self-employment.

In Canada, Japan and most European countries, all forms of flexible labor together account for 20 to 30 percent of total employment, see Table 3.2 and Figure 3.2. Particular high shares of flexible labor are found in the Mediterranean countries (more than 30 percent), but also in Poland (42 percent in 2012) and in the Netherlands (31 percent in 2012). The Mediterranean countries have a long tradition in flexible labor, particularly through self-employed workers. Poland and the Netherlands have experienced the largest growth in flexible labor relations during the last decade for different reasons (see below). The lowest share of flexible labor is found in the United States. Only around 11 percent of employment comes in the form of some type of flexible labor. Australia, the United Kingdom, Norway and Denmark have intermediate shares of flexible labor ranging from 14 to 19 percent. In the Eastern European countries there are large differences in the share of flexible labor, with Poland (42 percent in 2012) and Estonia (11 percent in 2012) as extremes. Overall, markets that are legislation driven or emerging (green lines in Figure 3.2) seem to allow for, or provoke more flexible labor than markets driven bij social dialogue (red lines in Figure 3.2), while market driven countries show the smallest shares of flexible labor (blue lines in Figure 3.2).

Table 3.1 Clustering of European Countries, based on location and market regulation*

European region	market regulation	countries
EU-Anglosaxon	Market driven	Ireland, United Kingdom
Scandinavia	Social dialogue	Denmark, Finland, Norway, Sweden
EU-Rhineland	Social dialogue	Austria, Belgium*, Germany, Netherlands
EU-Francophone	Legislation driven	Belgium*, France, Luxemburg
EU-Mediterranean	Legislation driven	Greece, Italy, Portugal, Spain
Eastern Europe	Emerging markets	Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovenia, Slovakia

* The clustering of European countries is taken from the Ciett publication 'Adapting to change'. For some countries the clustering is more arbitrary than for others. For example, Belgium has also many aspects of a social dialogue and could therefore also be clustered with EU-Rhineland. In this report the data for Belgium are clustered with EU-Francophone.

Figure 3.1 Clustering of European countries, based on location and market regulation

Although the share of flexible labor relations has been growing in a number of countries during the last decade, there is no clear evidence that the market for flexible labor in general is growing structurally. Neither worldwide, nor in Europe. Figure 3.3 shows the growth in the share of flexible labor in two periods, the pre-crisis period 2002-2007, and the recent period of economic recession 2007-2012. Between 2002 and 2007, the economy in almost all (western) countries increased in size. At the same time, the share of flexible labor increased in the United States and most European countries, but not in other large economies such as Japan, Australia and Canada, where the share of flexible labor decreased.

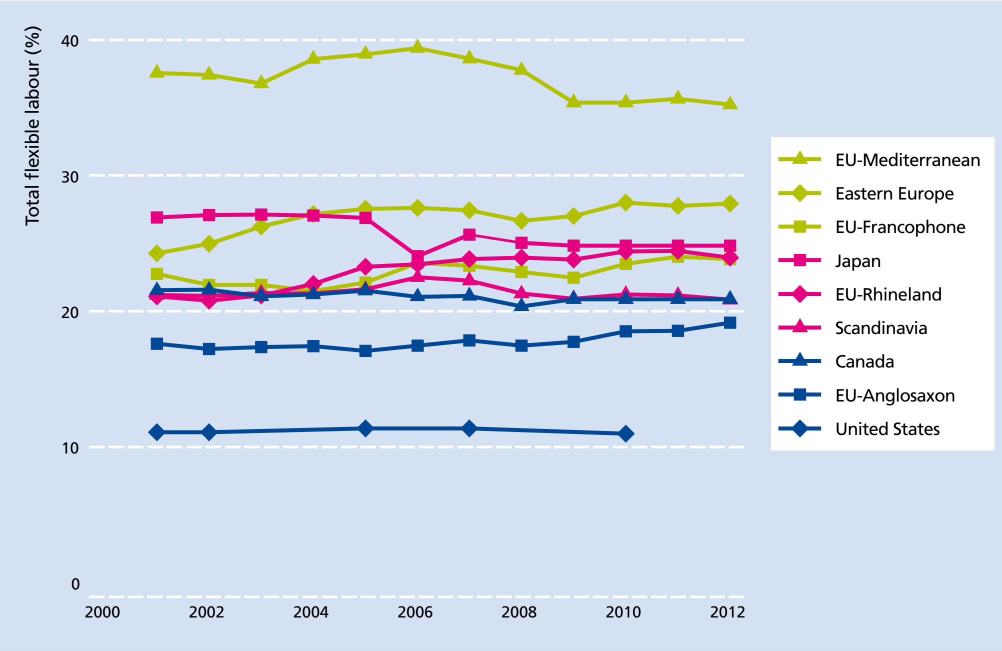
Table 3.2 Share of flexible labor relations in total employment (percentages)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
United States	11.1	11.1			11.4		11.4			11.0		
Canada	21.5	21.6	21.1	21.2	21.5	21.1	21.1	20.4	20.9	20.9	20.9	20.9
Japan	26.9	27.1	27.1	27.0	26.9	24.1	25.6	25.0	24.8	24.8	24.8	24.8
EU27	25.3	25.2	25.5	26.2	26.7	27.3	27.2	26.7	26.1	26.8	26.8	26.6
EU-Anglosaxon	17.6	17.2	17.4	17.4	17.1	17.5	17.9	17.5	17.8	18.5	18.6	19.1
Scandinavia	21.2	21.1	21.3	21.3	21.6	22.5	22.3	21.3	20.9	21.2	21.2	20.9
EU-Rhineland	21.1	20.8	21.2	22.0	23.3	23.5	23.8	24.0	23.8	24.4	24.4	24.0
EU-Francophone	22.7	22.0	21.9	21.5	22.1	23.6	23.4	22.9	22.5	23.5	24.0	23.9
EU-Mediterranean	37.6	37.4	36.8	38.6	39.0	39.4	38.6	37.8	35.4	35.4	35.7	35.2
Eastern Europe	24.3	25.0	26.2	27.2	27.5	27.6	27.4	26.7	27.0	28.0	27.8	27.9

Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and Ciett 2012*

* For the United States, data from the Bureau of Labor Statistics (BLS) are not used because of the incomparability of definitions.

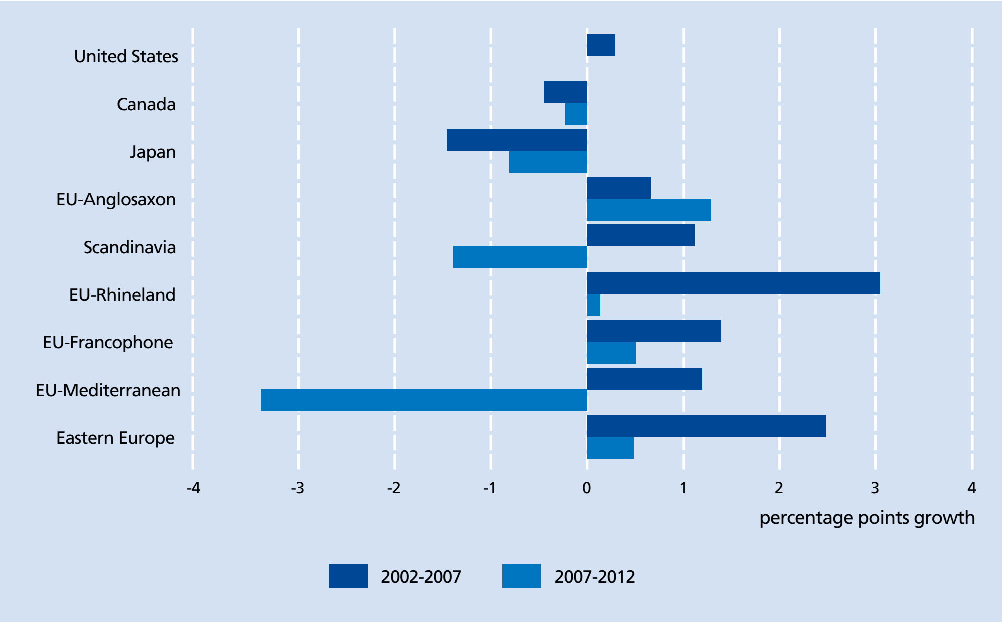
Figure 3.2 Share of flexible labor relations in total employment (percentages)



Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and Ciett 2012

Since 2007, a severe worldwide financial crisis has affected most western countries, particularly in Europe and North-America. In most countries in Europe, North America and Japan, the share of flexible labor declined during the economic recession. The sharpest decline is found in the Mediterranean and Scandinavian countries, in particular Spain and Norway. But there are also countries that experienced an increase in flexible labor despite the recent economic crisis. The United Kingdom, the Netherlands and a number of Eastern European countries are the main examples of this phenomenon. Therefore, even though there seems to be a correlation between economic growth and the share of flexible labor, this correlation is not a worldwide truth. Accounting for economic growth therefore does not fully explain the trends in flexible labor shares.

Figure 3.3 Growth in total share of flexible labor is correlated with economic growth



Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and Ciett 2012

Considering total flexible labor in general may however disguise trends in particular forms of flexible labor. For example, the growth in flexible labor in Poland is mainly caused by an increase in fixed-term contracts, while the growth in flexible labor in the Netherlands is mainly due to a continuous growth in self-employed workers. In other countries, a growth in fixed-term contracts may be offset by a decline in self-employment. Some forms of flexible labor may grow in periods of economic growth (e.g. agency work), while others may become relatively attractive during economic recessions (e.g. self-employed work). To see whether there are long-term trends in the share of flexible labor, each form of flexible labor is considered separately below.

4 fixed-term contracts

According to Eurostat's definition, temporary work includes employees with fixed-term contracts, who are hired directly by the employer, but it also includes employees working for a temporary employment agency and supplied to, and under supervision of a user company. Both types of temporary work are quite different. This chapter discusses fixed-term contracts in general, while agency work is elaborated separately in the next chapter.

There may be several reasons for hiring an employee on a fixed-term contract. The work may be specific and of limited duration, or employers may want to screen suitable candidates for open-ended labor positions. Fixed-term contracts give employers the opportunity to adapt the size of their workforce to economic conditions and at the same time facilitate job matching by providing initial work experience. This is particularly true for younger people, either during their educational period or when starting on the labor market.
On average, around 10 percent of all employees between 25-64 are on a fixed-term contract, while among those aged 15-24 the share is around 40 percent. In some countries, fixed-term contracts also provide the unemployed with a second chance to find the way back to the labor market.

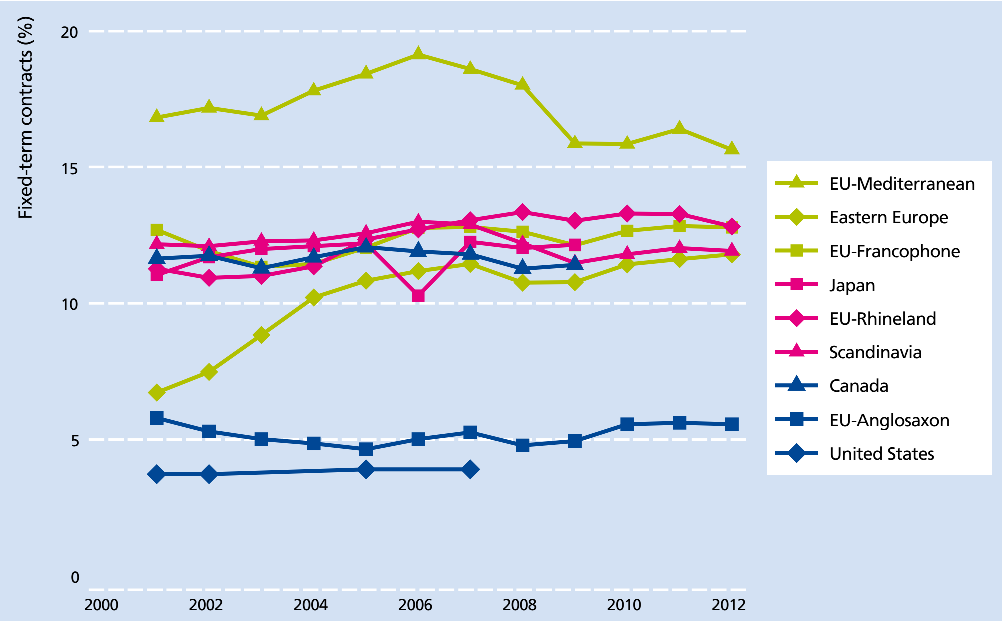
Currently, about half of all flexible labor consists of fixed-term contracts (the other half being self-employment). Table 4.1 and Figure 4.1 show that in most western countries between 10 and 15 percent of all workers have fixed-term contracts. The United States, Australia and the United

Table 4.1 Share of workers with fixed-term contracts in total employment (percentages)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
United States	3.7				3.9							
Canada	11.6	11.7	11.3	11.7	12.1	11.9	11.8	11.3	11.4			
Japan	11.0	11.7	12.0	12.1	12.2	10.3	12.3	12.0	12.2			
EU27	10.8	10.8	11.0	11.5	12.1	12.7	12.8	12.4	11.8	12.2	12.4	12.1
EU-Anglosaxon	5.8	5.3	5.0	4.8	4.6	5.0	5.3	4.8	4.9	5.6	5.6	5.6
Scandinavia	12.2	12.1	12.3	12.3	12.6	13.0	12.9	12.2	11.5	11.8	12.0	11.9
EU-Rhineland	11.3	10.9	11.0	11.4	12.3	12.7	13.1	13.4	13.0	13.3	13.3	12.8
EU-Francophone	12.7	11.9	11.3	11.4	12.0	12.8	12.8	12.6	12.1	12.7	12.8	12.8
EU-Mediterranean	16.8	17.2	16.9	17.8	18.4	19.1	18.6	18.0	15.9	15.9	16.4	15.6
Eastern Europe	6.7	7.5	8.8	10.2	10.8	11.2	11.4	10.8	10.8	11.4	11.6	11.8

Source: Calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012a

Figure 4.1 Share of workers with fixed-term contracts in total employment (percentages)



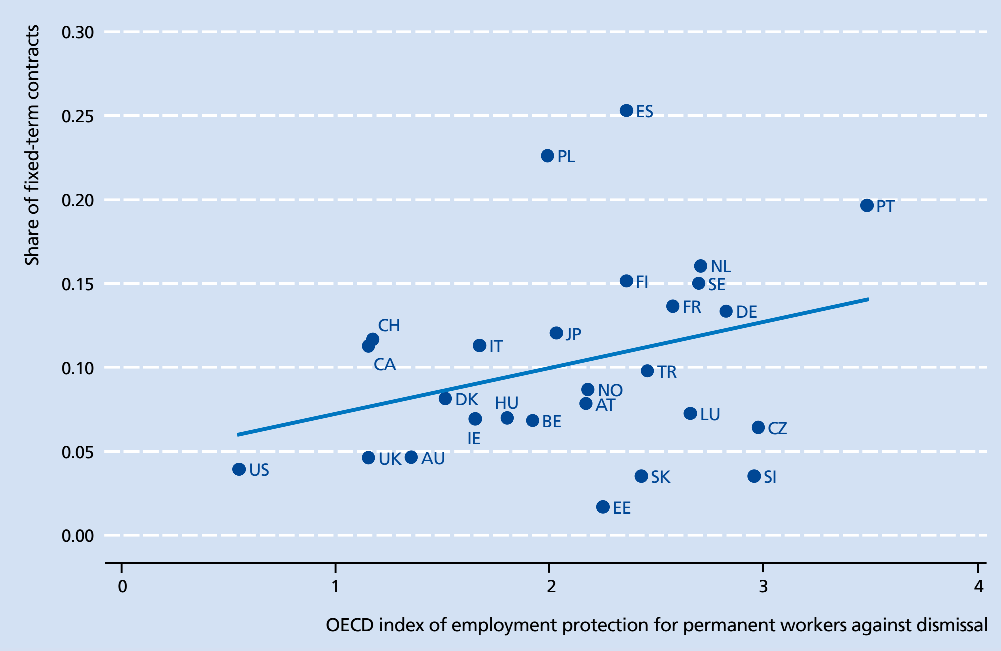
Source: SEO calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012a

Kingdom are important exceptions with only around 5 percent fixed-term contracts. These are also countries with the lowest protection of permanent workers against (individual) dismissal, see Figure 4.2.

Other special cases are Poland, Spain and Portugal. In Poland, the share of fixed-term contracts increased from less than 5 percent in 2000 to around 23 percent in 2012. This increase came hand in hand with strong economic growth of Poland as an emerging market. New economic opportunities were explored mainly using fixed-term contracts. In Spain, temporary work mainly consists of fixed-term contracts with a direct employer, as agency work is less common. Already since the early nineties, almost 30 percent of all Spanish workers have been on fixed-term contracts. In Spain, the 'stepping stone' function of temporary work appears to be limited, leading to what is known as a dual or segmented labor market with little transitions between flexible and traditional labor relations. The share of fixed-term contracts dropped in 2009 as a consequence of the economic crisis, which struck the Spanish labor market more than most other countries, and workers with a fixed-term contract in particular. In Portugal, fixed-term contracts lost importance in the early nineties but rapidly became more popular after 1997. Nowadays, almost 20 percent of all workers have fixed-term contracts in Portugal.

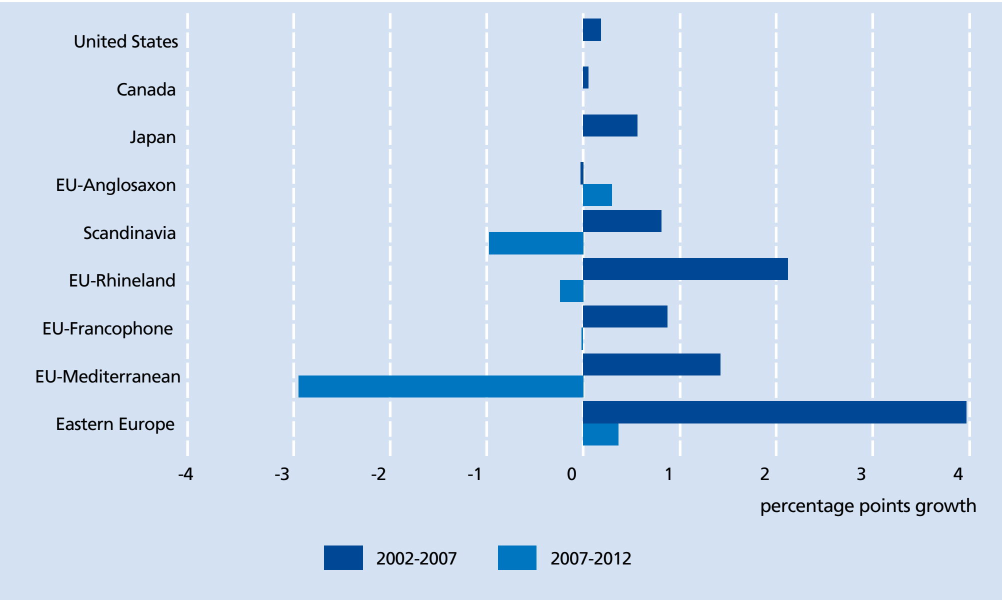
Looking at the growth of fixed-term contracts, there seems to be some growing trend worldwide, particularly during the pre-crisis period 2002-2007. Figure 4.3 shows that in almost all countries for which consistent data can be collected, the share of fixed-term contracts increased during that period. Exceptions are the United Kingdom, Norway and two Baltic states.
Large increases in fixed-term contracts were found in emerging and booming markets such as Poland, Romania and Ireland, but also in established economies like Italy and the Netherlands.

Figure 4.2 The share of fixed-term contracts is positively correlated with the extend of employment protection for open-ended contract workers



SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and OECD 2009

Figure 4.3 Worldwide growth in the share of fixed-term contracts only in the pre-crisis period



Source: SEO calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012a

In the Netherlands these developments are driven by institutional factors, in particular through the Flexibility and Security Act of 1999, which allow employers to offer multiple fixed-term contracts to employees in a row.

However, when the recent economic crisis kicked in, the share of fixed-term contracts declined in most of these countries. The crisis was assimilated by businesses through not renewing fixed-term contracts. As a result, the share of fixed-term contracts in total employment fell seriously in 2008 and 2009, particularly in Spain. In most countries however, the share of fixed-term contracts in total employment increased again in more recent years. As a result, the share of workers with a fixed-term contracts has been around 12 percent in the EU since 2007.

5 agency work

With agency work, the employer does not hire an employee directly on a fixed-term contract, but through a private employment agency. Typically the employee is hired directly by the employment agency, mostly on a fixed-term basis but occasionally on a open-ended contract. During the contract period, the employee can be assigned to different user companies. After the contract expires, a renewed contract with the employment agency is one of the possibilities, but also a contract with one of the user companies. In Bridging the Gap (SEO, 2010) some empirical evidence was presented on this 'stepping stone' function of fixed-term contracts in general and agency work in particular. Agency work give employers the opportunity to adapt the size of their workforce to economic conditions and at the same time facilitate job matching by providing initial work experience. This is particularly true for younger people, either during their educational period or when starting on the labor market, but also for the unemployed to find their way back to the labor market. 'The Role of Temporary Agency Work and Labour Market Transitions in Europe' (Eurociett, 2013) demonstrates the positive role temporary agency work plays in facilitating these transitions in the labor market.

Good statistics on agency work are still scarce. In this report, all statistics on agency work are taken from Ciett, the International Confederation of Private Employment Agencies. Reliability and comparability may be an issue for some countries, but are improving constantly.

Agency work accounts for a relatively small but important part of total employment. It has a long tradition in the United States, with a long-term share in total employment of around 2 percent (Table 5.1 and Figure 5.1). In South-America, agency work is a relatively small phenomenon, which has reached shares of around 0.5 to 1 percent of total employment. In Japan, agency work has become more popular since 2000, with the current share at around 1.5 to 2 percent while in South Korea the share of agency work is increasing slowly from 0.2 to 0.5 percent. In Europe, agency work has the highest employment share in the United Kingdom, followed traditionally by the Benelux countries and France, where agency work has been well-established for four to five decades now. In Ireland and the German speaking countries, agency work has become much more popular over the last decade.

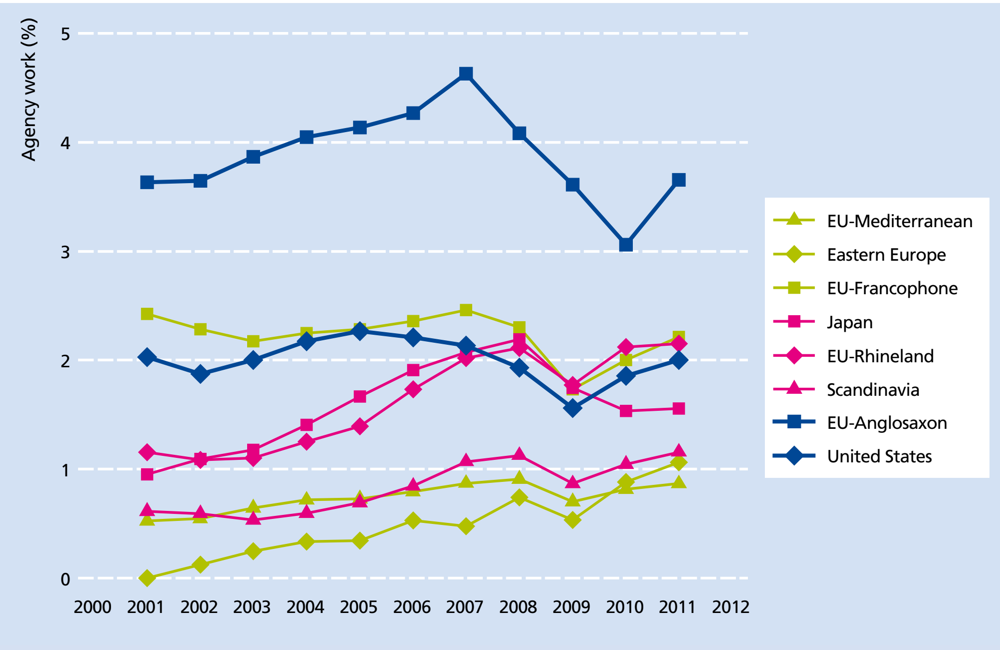
Table 5.1 and Figure 5.1 suggest that agency work is a relatively new phenomenon in many countries, with high growth in recent years and high growth potentials in the near future. Large increases in the share of agency work is particularly true for the pre-crisis period 2002-2007. Shares have doubled in some European regions during that period, particularly in countries as Italy, Finland, Norway and Poland, which all had agency work shares of less than 0.5 percent in 2002. However, part of the gain in agency work has been lost since 2007. The crisis caused a dip in the use of agency work in 2009. In the United Kingdom, the share even dropped from 4.8 percent to 3.1 percent between 2007 and 2010. Although the share of agency work recovered in most countries in 2010, the low economic growth in recent years has prevented agency work to reach

Table 5.1 Share of agency workers in total employment (percentages)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
United States	1.9	1.8	2.0	2.1	2.2	2.2	2.1	1.9	1.5	1.8	1.9
Argentina	0.3	0.2	0.3	0.4	0.4	0.5	0.5	0.5	0.3	0.4	0.4
Brazil						0.9	1.0	0.9	1.0	1.0	1.1
South Africa					2.3	2.2	2.1	3.4	6.4	7.1	7.2
Japan	1.0	1.1	1.2	1.4	1.7	1.9	2.1	2.2	1.8	1.5	1.5
South Korea				0.2	0.3	0.3	0.3	0.3	0.4	0.4	0.5
Australia									2.8	2.7	2.8
EU27	1.4	1.4	1.5	1.6	1.6	1.8	1.9	1.7	1.4	1.6	1.6
EU-Anglosaxon	3.6	3.6	3.9	4.0	4.1	4.3	4.6	4.1	3.6	3.1	3.7
Scandinavia	0.6	0.6	0.5	0.6	0.7	0.8	1.1	1.1	0.9	1.0	1.2
EU-Rhineland	1.2	1.1	1.1	1.3	1.4	1.7	2.0	2.1	1.8	2.1	2.2
EU-Francophone	2.4	2.3	2.2	2.2	2.3	2.4	2.5	2.3	1.7	2.0	2.2
EU-Mediterranean	0.5	0.5	0.6	0.7	0.7	0.8	0.9	0.9	0.7	0.8	0.9
Eastern Europe	0.0	0.1	0.2	0.3	0.3	0.5	0.6	0.7	0.5	0.9	1.1

Source: SEO calculations based on Ciett 2012, Eurostat Labour Force Statistics 2012 and OECD 2012a

Figure 5.1 Share of agency workers in total employment (percentages)

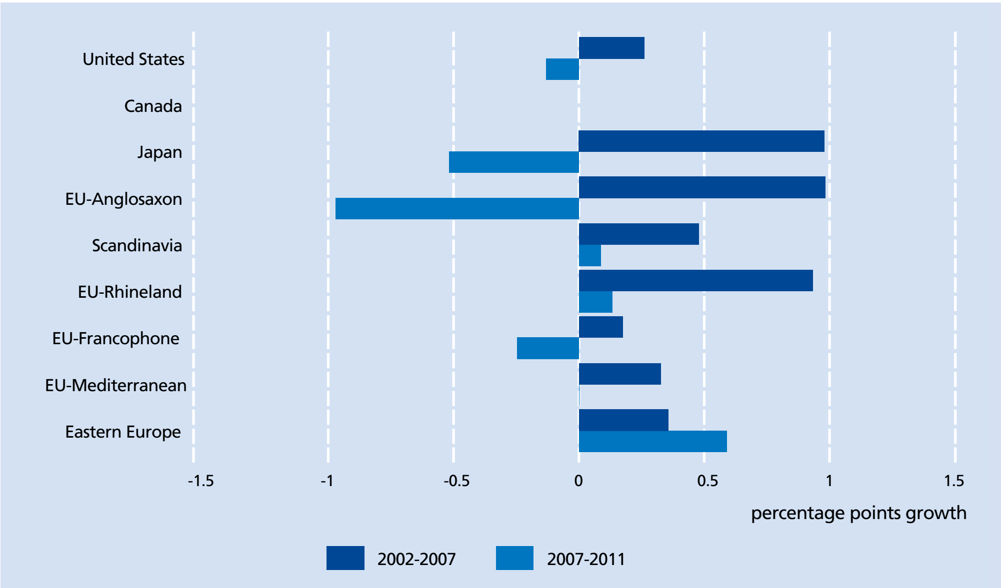


Source: SEO calculations based on Ciett 2012, Eurostat Labour Force Statistics 2012 and OECD 2012a pre-crisis levels. Exceptions are the Scandinavian countries, where the share of agency work was well below EU-average, Germany, Ireland and a number of the Eastern European countries. The latter ones being young emerging markets, where economic growth has been less affected by the crisis. However, the latest figures from 2012 show a new dip in the share of agency work in total employment, especially in Germany. Agency work appears to be an important shock absorber of labor demand.

The role of shock absorber is stronger when agency work is used for the lower segments of the labor market. In general, jobs of higher educated, older and more experienced workers depend less on economic circumstances. On average, agency workers are relatively young. In most countries the majority has not reached the age of 30. The most important exceptions are the United States and Denmark, where the age distribution of agency workers is more symmetric: a third is younger than age 30, a third is between 30 and 45 years of age, and a third is older than 45. Sweden, Japan and Germany also have relatively 'older' populations of agency workers, with nearly 60 percent over 30 years of age. The United States, Denmark, Sweden and Germany are also countries where the share of agency workers has been less affected by fluctuations in economic growth.

The age distribution correlates with the distribution of the level of education of agency workers. In some countries, for example in the Netherlands and Belgium, a large number of agency workers are students. They do not show up as 'medium' or 'higher' educated, since they have only completed secondary education. However, for most of them a tertiary education diploma is only a matter of time. In countries such as the United Kingdom, Spain and the Czech Republic, agency workers are truly predominantly lower educated, which means that they have not and will not complete secondary education. In these countries, the share of agency workers has declined

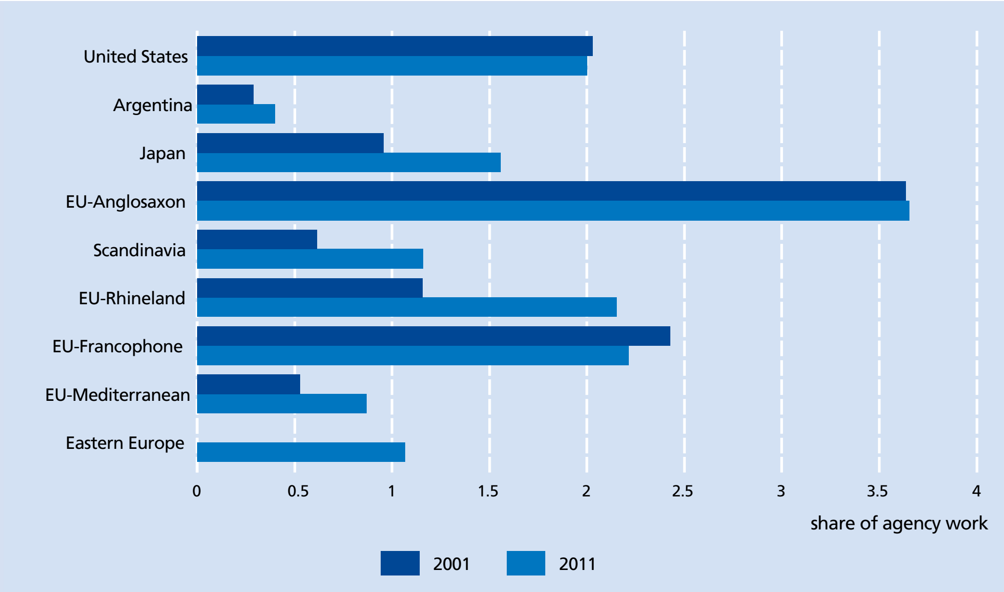
Figure 5.2 Growth in share of agency work strongly correlates with economic growth



Source: SEO calculations based on Ciett 2012, Eurostat Labour Force Statistics 2012 and OECD 2012a tremendously between 2007 and 2012. On the other hand, temporary employment agencies in Scandinavia employ many higher educated employees. In most of the Scandinavian countries, the share of agency work has increased between 2007 and 2012. That illustrates that agency work is more sensitive to economic shocks when it is predominantly used for the lower segments of the labor market.

Agency work is the first form of employment affected by a decline in labor demand in an economic crisis, particularly when agency workers are younger and lower educated. But at the same time, agency work will be the first type of employment offered when the economy stabilizes after a crisis. The opportunity to offer agency work may even accelerate economic growth. Therefore, a further growth in agency work can be expected once the economies in most western countries start to grow substantially again. At the same time, agency work has grown in nearly all markets over the last decade, as shown by Figure 5.3. Agency work, though forming only a small part of all flexible labor relations, has shown a structural growth beyond the regular business cycle.

Figure 5.3 Share of agency workers in total employment (percentages)



SEO calculations based on Ciett 2012, Eurostat Labour Force Statistics 2012 and OECD 2012a

6 self-employment

When about half of all flexible labor relations consists of fixed-term contracts, the other half consists of self-employment. The share of self-employment around the western world roughly lies between 7 and 20 percent (Table 6.1 and Figure 6.1). The United States, Canada and the Scandinavian countries have the lowest share of self-employment (and flexible labor in general). In the EU, 14.5 percent of all employment is self-employment. Particularly high shares of self-employment between 15 and 20 percent can be found in Southern- and Eastern-European countries, mainly in Turkey, Italy, Portugal, Poland, Romania, Czech Republic, Spain and Slovakia. In these countries, the formal economy is traditionally smaller or still emerging.

Many self-employed workers can be found in the agricultural sector. Ignoring this sector means that self-employed workers are more evenly spread over Europe. In many of the countries with a high share of self-employed workers, such as Greece, Turkey, Romania and Italy, small agricultural businesses are an important explanation. However, even when looking at the non-agricultural self-employed workers only, these countries still appear on top of the list.

The growth in self-employed workers has been large and consistent in most European countries during the last decade. Figure 6.2 shows that this was not only the case during the pre-crisis period 2002-2007, but has continued since then. In a number of countries, the post-crisis growth in self-employed workers has even been larger than the pre-crisis growth, for example in the United Kingdom, Ireland, France, Poland, Slovenia, and particularly the Netherlands. Where the share of Dutch self-employed workers increased from 10 percent in 2000 to 12 percent in 2007, it has increased to 14 percent in 2012, despite or as a result of the

Own-account workers

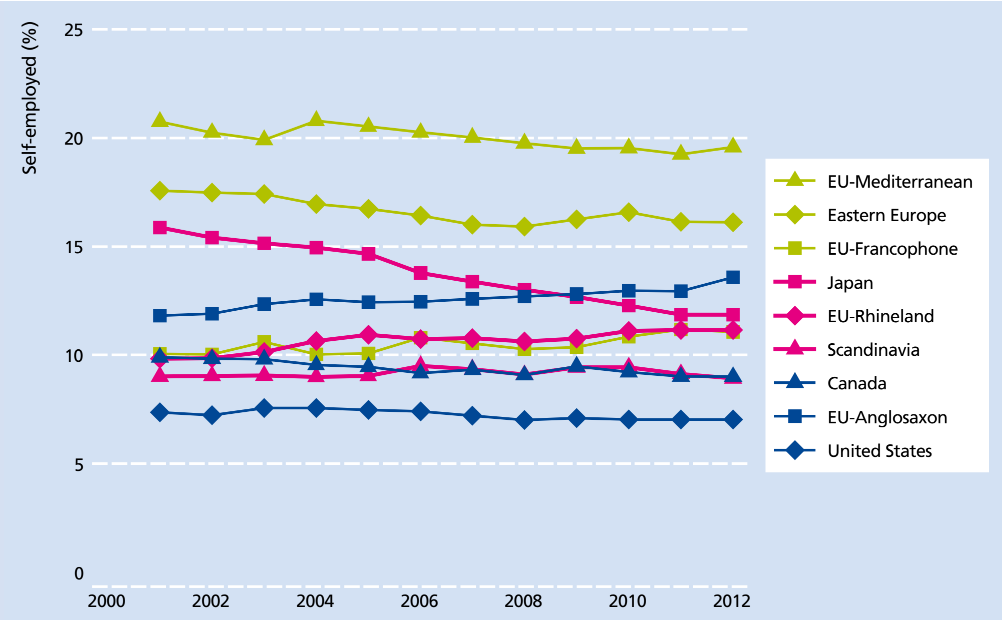
Self-employment includes both owners of businesses, who can be considered employers rather than employees, and own-account workers. Own-account workers are those workers who, working on their own account or with one or more partners, hold the type of job defined as a self-employed job (International Labour Organization (ILO), Resolutions Concerning International Classification of Status in Employment Adopted by the 15th International Conference of Labour Statisticians, January 1993). The business of these own-account workers increasingly include the production of labor services rather than products or business services. They are an alternative and substitute for traditional employees in the labor market, including those on other flexible contracts. Own-account workers can be considered part of the flexible labor market, which is not necessarily true for owners of businesses. For countries outside Europe however, no distinction can be made between own-account workers and business owners. Since own-account workers form the major part of all self-employment, total flexible labor is considered to include all forms of self-employment to enable the comparison with countries outside Europe.

Table 6.1 Share of self-employed in total employment (percentages)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
United States	7.4	7.2	7.6	7.6	7.5	7.4	7.2	7.0	7.1	7.0	7.0	
Canada	9.9	9.8	9.8	9.5	9.5	9.2	9.3	9.1	9.5	9.2	9.0	
Japan	15.9	15.4	15.1	14.9	14.7	13.8	13.4	13.0	12.7	12.3	11.9	
EU27	14.5	14.4	14.5	14.7	14.6	14.6	14.4	14.3	14.3	14.6	14.4	14.5
EU-Anglosaxon	11.8	11.9	12.3	12.6	12.4	12.5	12.6	12.7	12.8	13.0	12.9	13.6
Scandinavia	9.0	9.0	9.1	9.0	9.0	9.5	9.4	9.1	9.4	9.4	9.1	8.9
EU-Rhineland	9.8	9.9	10.1	10.6	10.9	10.7	10.8	10.6	10.8	11.1	11.2	11.2
EU-Francophone	10.1	10.0	10.6	10.0	10.1	10.8	10.5	10.3	10.4	10.8	11.2	11.1
EU-Mediterranean	20.7	20.2	19.9	20.8	20.5	20.3	20.0	19.8	19.5	19.5	19.2	19.6
Eastern Europe	17.6	17.5	17.4	17.0	16.7	16.4	16.0	15.9	16.2	16.6	16.1	16.1

Source: Calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012

Figure 6.1 Share of self-employed in total employment (percentages)



Source: SEO calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012a

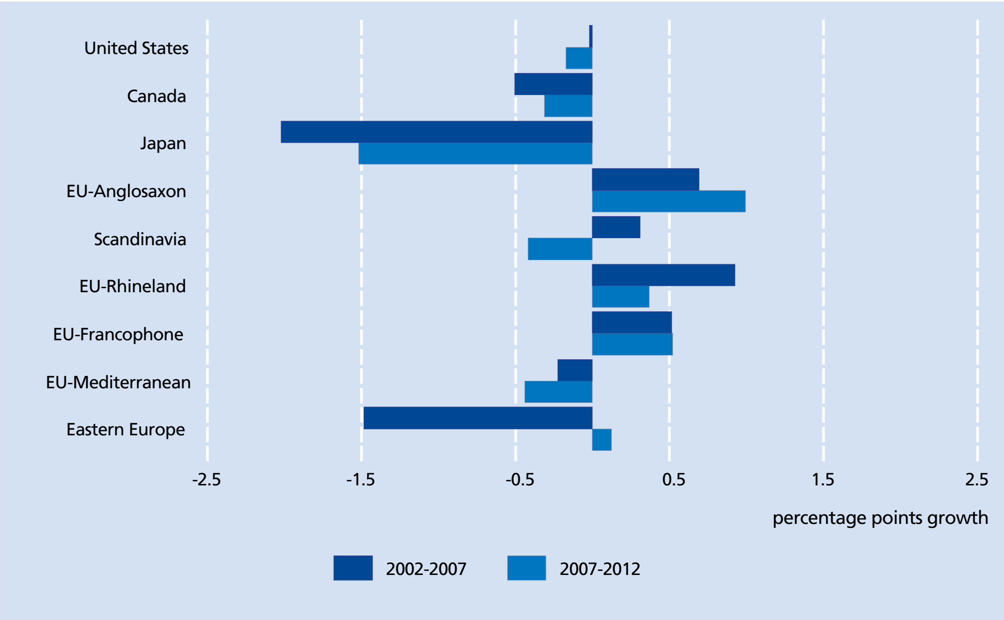
economic crisis. In times of economic recession, when jobs are scarce, employees who lose their job may decide to offer their labor services to companies. These flexible labor services may be attractive to companies as they offer comparable labor productivity in the short run at lower risks. This may be one of the explanations for the limited increase in unemployment in the Netherlands after the economic recession of 2009 compared to many other European countries: instead of becoming unemployed, many people started their own business. In the long run however, self-employed workers may not all be good substitutes for traditional employees, who have more opportunities to invest in company-specific knowledge and skills (firm-specific human capital). This would eventually lead to a decline in the share of self-employed workers.

The trend of an increasing share of self-employed workers appears to be typical for the Anglosaxon, Rhineland and Francophone parts of Europe only. In Bridging the gap (SEO, 2010), Gunther Schmidt states that most of the increase in own-account work (the largest part of self-employment) for women in Europe between 1995 and 2005 took part in the form of part-time work (54 percent compared to 15 percent in full-time self-employment). A similar pattern can be seen among men.

The share of part-time working women in own-account work ranges from 11 percent in Greece, over 18 percent in France, 32 percent in Sweden, 38 percent in Germany, to 68 percent in the Netherlands. 'Having a family with children' turns out to be the most important driver for the choice of part-time work in self-employment. This pattern is especially strong in so-called 'conservative welfare regimes', where public care facilities are still underdeveloped and where traditional values concerning labor division in the family still prevail.

Figure 6.2 shows regions with declining shares of self-employment inside and outside Europe, both before and after the recent economic recession. It turns out that the growth in flexible labor in terms of self-employed workers cannot be considered as a worldwide trend, but seems to be a structural phenomenon in Anglosaxon, Rhineland and Francophone countries of Europe only.

Figure 6.2 Much variation in the growth of the share of self-employed workers



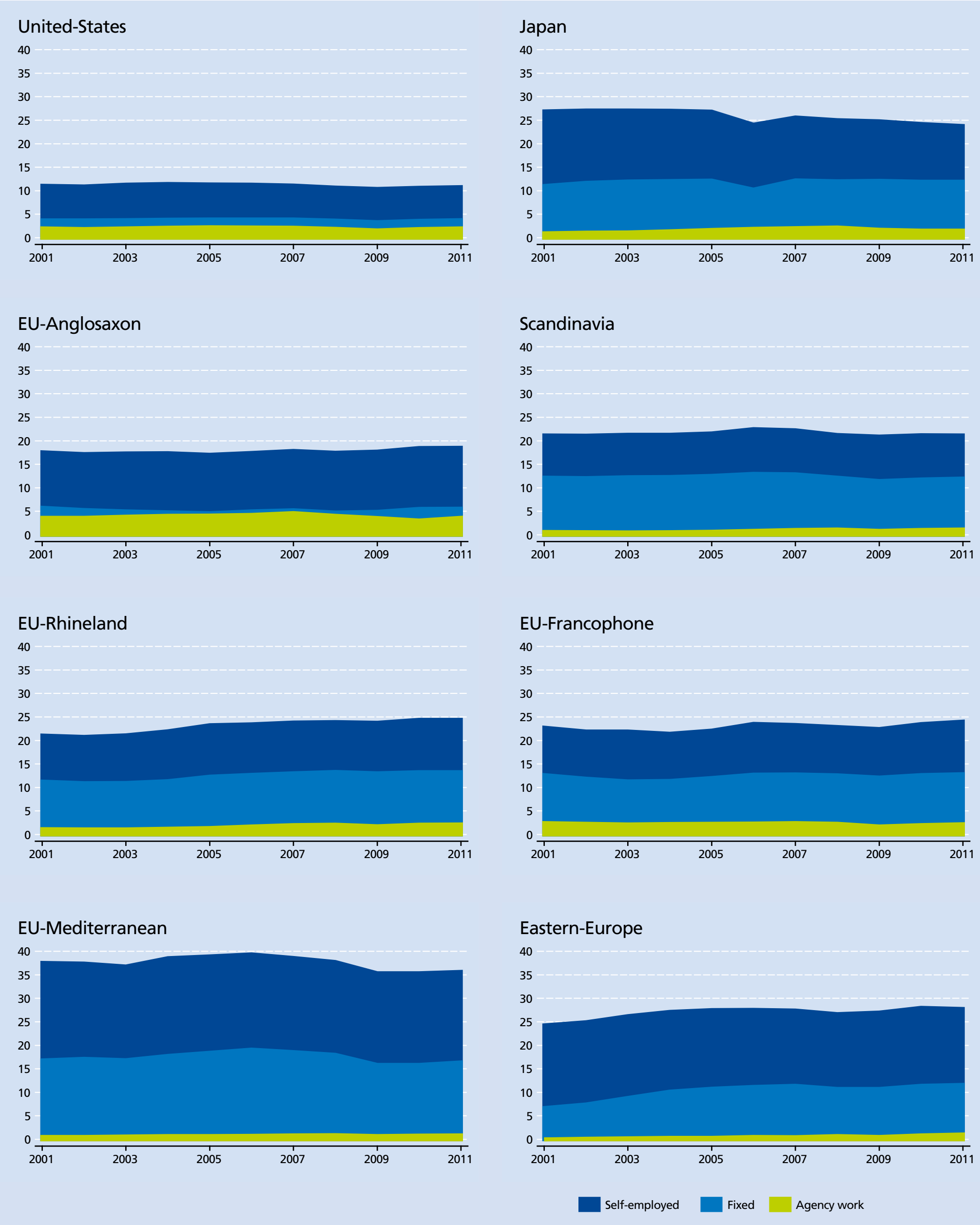
Source: SEO calculations based on Eurostat Labour Force Statistics 2012 and OECD 2012a

7 relation between different forms of flexible labor

As mentioned in the previous chapters, there is no clear evidence that the market for flexible labor is structurally growing, neither worldwide, nor in Europe. Flexible labor consists mainly of self-employed workers and fixed-term contracts, agency work still plays a minor role. Could there however be a trade-off between different forms of flexible labor, such that a structural trend in the growth of flexible labor is disguised?

To answer this question, the growth in the three major types of (external) flexible labor in the countries under consideration can be related to each other. From such an analysis it turns out that none of the relations shows a structural correlation between growth in one form of flexible labor and growth or decline in any other form of flexible labor. A growth in one type of flexible labor is therefore not structurally compensated by a decline in another type of flexible labor. An alternative way to illustrate this is by showing cumulative shares of flexible labor. Figure 7.1 shows that there has been some variation in the share of different types of flexible labor between 2001 and 2011, but also that there has not been a trade-off between different types. For example, the share of self-employment has declined in Japan, while the share of fixed-term contracts have been rather constant. The share of fixed-term contracts in the Scandinavian countries have varied during the 2001-2011 period, while the share of self-employment has been rather constant. The EU-Rhineland countries (Germany, Austria and the Netherlands) have shown relatively large growth rates in all types of flexible labor between 2001 and 2011, but coming from relatively low shares. The United States clearly has the lowest shares of flexible labor compared to Japan and Europe.

Figure 7.1 **No clear trade-offs between different types of flexible labor**



Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and Ciett 2012

8 observations: europe

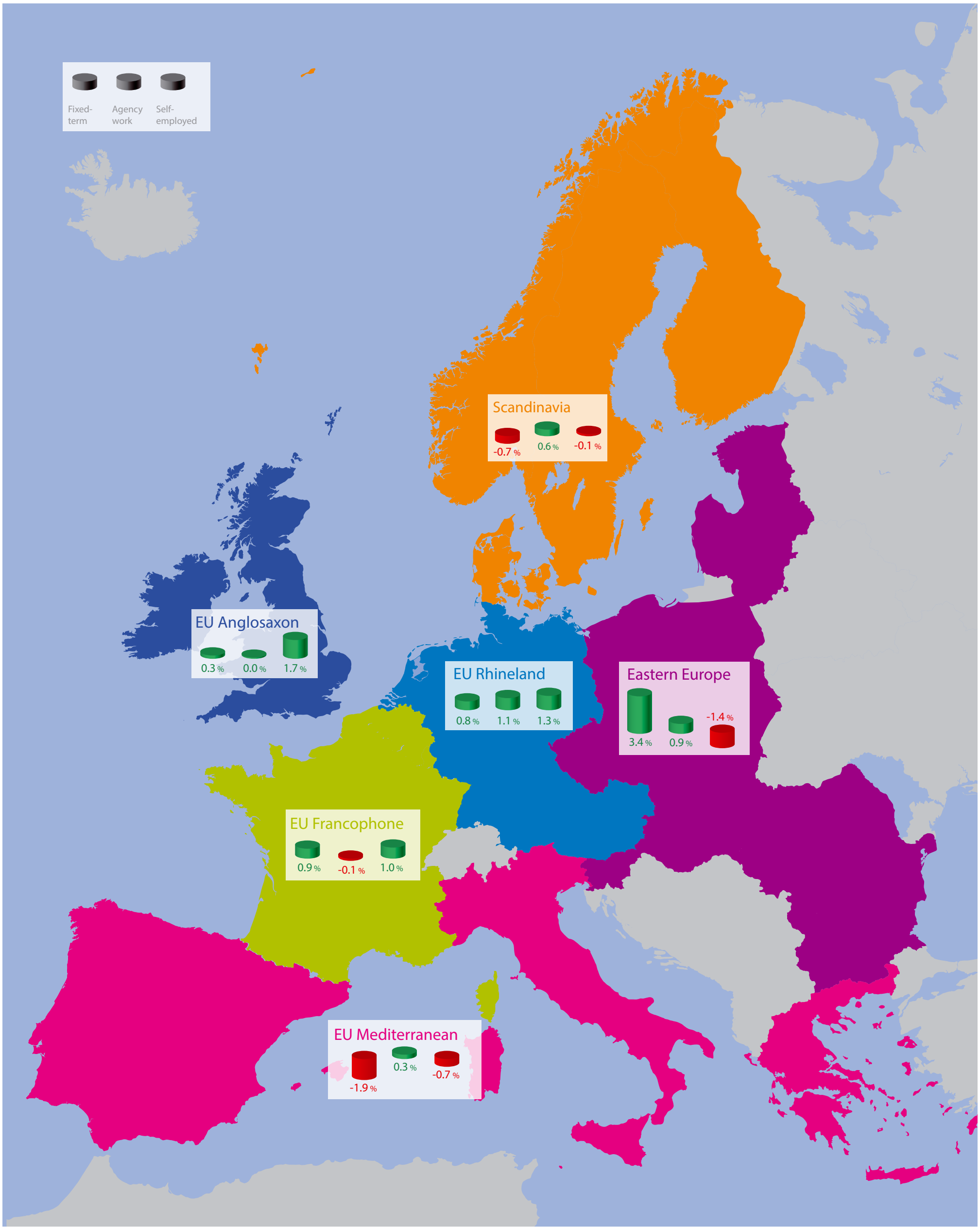
Since there is neither a structural growth in the share of flexible labor, nor a trade-off between different forms of flexible labor, other factors may play a role in influencing the difference in growth of flexible labor relations between countries and regions. To determine which factors may be of importance, a closer look is taken at different clusters within Europe.

Growth of flexible labor relations can mainly be found in the EU-Rhineland, EU-Anglosaxon and EU-Francophone countries, see Figure 8.1. In the EU-Rhineland, the share of all types of flexible labor is rising. This can partly be attributed to the fairly stable economic situation in these countries, but may also be driven by institutional factors. These include labor market reforms in the Netherlands, the Flexibility and Security act (1999), and in Germany the Hartz reforms (2003-2005).

The demand for flexible labor in the EU-Anglosaxon and EU-Francophone clusters is growing more slowly. The EU-Anglosaxon countries have traditionally a low demand for flexible labor and a relatively low employment protection of workers (UK and IE in Figure 8.2), in particular those with a fixed-term contract against (individual) dismissal (UK and IE in Figure 4.2). The demand for fixed-term contracts is highly cyclical and for a relatively large part served for by agency work. The growth of flexible labor is mainly due to the growing share of self-employed, both before and after the 2007 crisis. In the EU-Francophone countries, the share of flexible labor is traditionally higher and the growth pattern is similar to the EU-Rhineland countries. Both the share of fixed-term contracts and self-employment grow steadily, while the demand for agency work shows a more cyclical pattern.

Declining shares of flexible labor are found in Scandinavia, the EU-Mediterranean countries and in Eastern Europe. The share of self-employment is rather stable in Scandinavia and agency work is slowly gaining market, mostly in Sweden, but the share of workers with a fixed-term contract directly with the employer is declining, mainly since the crisis. In the EU-Mediterranean and Eastern European countries, the total share of flexible labor in employment is declining. In both regions, there is an historical high share of self-employed workers, especially in agriculture and retail, but this share is declining due to societal and economical changes. At the same time, the traditional high share of workers with fixed-term contracts in the EU-Mediterranean countries falls rapidly as well. This is mainly due to the economic crisis and the end of the construction boom in Spain. In Eastern Europe, the emerging (formal) economy compensates this effect of the economic crisis with respect to fixed-term contracts. In both regions however, agency work is gaining ground as a new service on the labor market.

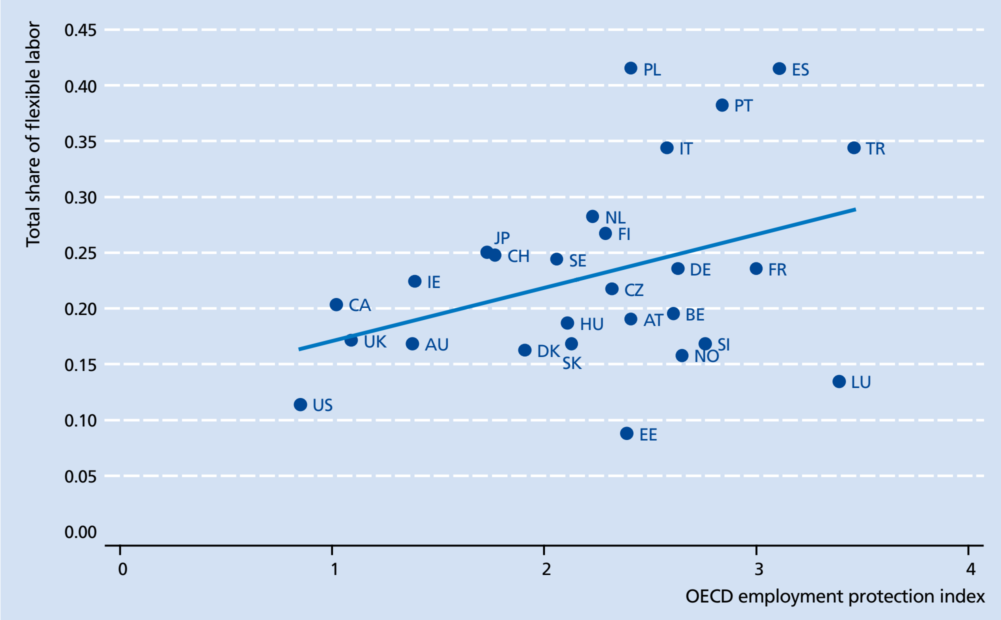
Figure 8.1 Different growth-patterns of flexible labor relations in Europe (Growth of share of direct fixed-term contracts, agency work and self-employment, 2002-2012)*



* Growth of share of agency work between 2002 and 2011.

Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and Ciett 2012

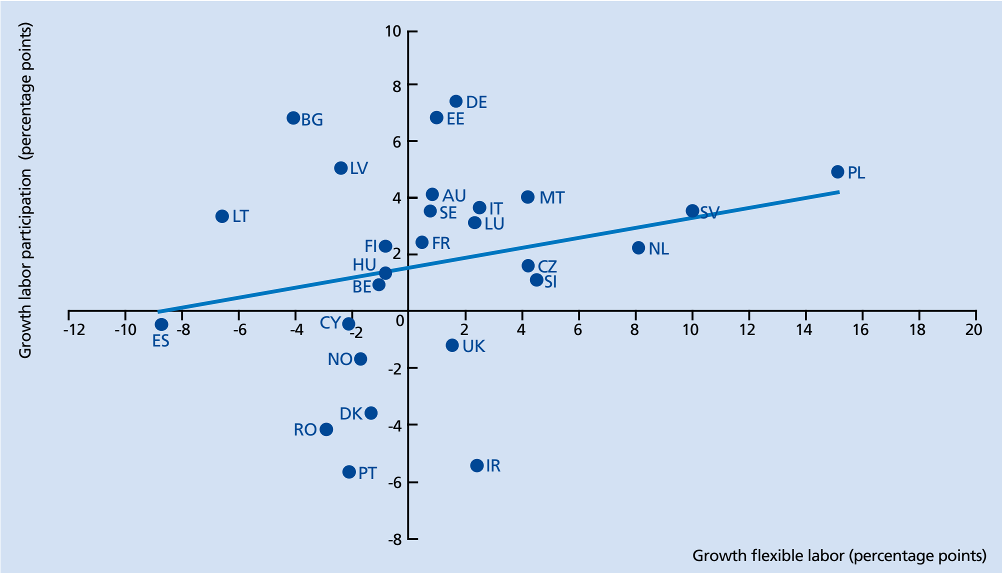
Figure 8.2 Total share of flexible labor is correlated with the extend of employment protection



Source: SEO calculations based on Eurostat Labour Force Statistics 2012, OECD 2012a and OECD 2009

Regions with a fairly strong growth in the share of flexible labor, the EU-Rhineland, EU-Francophone and EU-Anglosaxon countries, are also characterized by a sharp increase in labor participation over the last decade (see Figure 8.3). For EU-Rhineland this is combined with a high level of part-time employment. It implies that flexible labor relations give more opportunities for new labor participants to enter the labor market. Although labor participation in the EU-Mediterranean and Eastern European countries have shown a steady growth over the last decade as well, the level is still low compared to the other European countries. This suggests a labor market in which it is more difficult for new, non-traditional participants to enter.

Figure 8.3 **Apparent relation between flexible labor relations and labor participation (Growth of share of flexible labor relations versus growth of labor participation, 15-64 years 2002-2012)**



Source: Eurostat

9 conclusions

There is no evidence that the strong growth in the share of flexible labor in the most recent pre-crisis period points at a worldwide trend towards a larger share of flexible labor at the expense of traditional open-ended labor contracts. The growth in flexible labor varies too much between countries and periods to draw such a conclusion.

There is also no structural trade-off between different forms of (formal) flexible labor. Observations in Europe show that growth or decline of different types of flexible labor can be attributed to changes in both local societal and economic structures and in institutions and legislation. Growth of flexible labor appears mainly in countries where the labor participation is increasing while it is declining where labor participation is relatively low or stagnating. This suggests an important role for flexible labor for new non-traditional labor market participants to enter the labor market.

At the same time, there is a strong correlation between the share of flexible labor and economic growth, particularly with respect to fixed-term contracts and agency work. The economic recession that followed after the worldwide economic crisis of 2007 has stopped, and in some cases even turned around, the growth in fixed-term contracts and agency work. Flexible labor is the first form of employment effected by a decline in labor demand in an economic crisis, particularly when flexible workers are younger and lower educated. But at the same time, flexible work will be the first type of employment that recovers when the economy stabilizes after a crisis. The opportunity to offer flexible work may even accelerate economic growth. Therefore, a further growth in flexible work can be expected once the economies in most western countries start to grow significantly again. In particular agency work, though forming only a small part of all flexible labor relations, has shown a structural growth beyond the regular business cycle.

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appendices

appendix A glossary

active labor force	'active' part of the 'potential labor force', i.e. the number of employed plus the number of unemployed
active population	same as 'labor force' or 'active labor force'
agency work	employment where a worker is employed by a temporary work agency and hired out to perform his/her work at (and under the supervision of) the user company, the employment contract is of limited or unspecified duration with no guarantee of continuation, short for 'temporary agency work'
CIETT	International Confederation of Private Employment Agencies
ELFS	European Labor Force Survey
employment rate	total employment, that consists of employees and self-employed, as a percentage of the 'potential labor force'
EU	European Union
fixed-term contract	employment contract of which the end is determined by objective conditions, such as a specific date, the completion of an assignment, or the return of an employee who is temporarily replaced, opposite to 'open-ended contract', same as 'temporary work'
flexible labor	All forms of labor that enables the external numerical adjustment of the labor intake by employers; this can be achieved by employing workers on fixed-term contracts, hiring workers through temporary employment agencies or by hiring labor services from self-employed workers
FTE	fulltime equivalent (1 FTE is usually 36-40 hours per week, depending on country and sector)
GDP	Gross Domestic Product, or national income
gender pay gap	difference in wages between men and women
grey rate	population aged 65+ as percentage of population aged 15-64
IDEAL	International Database on Employment and Adaptable Labor
ILO	International Labor Organization: tripartite United Nations agency with a membership of 183 countries that draws up international labor standards.

inactive	not working and also not actively searching for a job, e.g. housewifes and students who are actively looking for a job are not considered 'inactive', they are counted as 'unemployed', same as 'not in labor force'
inactive population	the people in working age that do not belong to the active population
ISIC	International Standard Industry Classification
labor force	synonym often used instead of 'active labor force': the number of employed plus the number of unemployed (normally defined within a 'working age' category)
labor productivity	the amount of goods and services that an employee can produce; technical definition: total GDP / total employment
LFS	Labor Force Survey
not in labor force	not working and also not actively searching for a job, e.g. housewifes and students who are actively looking for a job are not considered 'inactive', they are counted as 'unemployed', same as 'inactive population'
OECD	Organization for Economic Co-operation and Development (in Dutch: OESO)
open-ended contract	employment contract of unspecified duration, the term of the contract is not fixed, opposite to fixed-term contract, often denoted by 'permanent contract'
own-account workers	workers who, working on their own account or with one or more partners, hold the type of job defined as a self-employed job
participation rate	synonym for employment rate
part-time work (theoretically)	working less than 1 FTE
part-time rate (OECD harmonized def.)	share of employees working less than 30 hours/week
part-time rate (Eurostat def.)	for most countries: share of people who self-report working part-time, for the Netherlands, Sweden and Norway the share of employees working less than 35 hours per week
penetration rate	average daily number of temporary agency workers in FTE, as a percentage of total employment in persons
permanent contract	often used as synonym for 'open-ended contract', although strictly not the same
potential labor force	all persons between 15-64 years of age (or sometimes other age brackets, like 20-64 or 20-75), either employed, self-employed or inactive, same as 'working age population'
self-employed	self-employed persons work in their own business, farm or professional practice, procucing products or services for the market, including labor services

self-employment	part of total employment that consists of self-employed persons
skill level (of a job)	the level of education required for the job: e.g. high school, university etc.
skill level (of an employee)	the level of the highest successfully completed educational degree: e.g. high school, university etc.
temporary agency work	employment where a worker is employed by a temporary work agency and hired out to perform his/her work at (and under the supervision of) the user company, the employment contract is of limited or unspecified duration with no guarantee of continuation, not similar to temporary work
temporary work	used by Eurostat and other official statistics to indicate fixed-term contracts: employment contract of which the end is determined by objective conditions, such as a specific date, the completion of an assignment, or the return of an employee who is temporarily replaced, includes temporary agency work, opposite to 'open-ended contract'
temp workers	employees categorized by the definition of 'temporary work'
total employment	the number of employees plus the number of self-employed
unemployment (international definition)	not working and actively searching for a job, e.g. housewifes and students who are not actively looking for a job are not counted as unemployed, they are considered 'not in labor force' i.e. 'inactive population'
unemployment rate	the number of unemployed as a percentage of the 'active labor force'
workforce	synonym for 'labor force'
working age population	population between 15-64 years of age (or sometimes 20-64), same as 'potential labor force'

appendix B data sources

In most developed countries the use of non-standard, more flexible forms of labor has increased during the last one or two decades. But at the same time very large differences exist between countries in the scale and forms of modern labor relations. The enlargement of the EU with the Eastern and Central-European countries increased heterogeneity even more. Differences in regulations and restrictions, the workforce and the economic situation are considered to be the main causes for these differences. The Netherlands are a special case when looking at flexible labor. Not only are modern forms of labor commonly used in the Netherlands (part-time work can not be called 'non-standard' anymore), also the role of temporary agency work is much larger than in most other countries. For Randstad Holding, a major player in the Dutch, European and even world market for temporary work, it is important to learn more about the use of flexible forms of labor, the driving forces behind it and differences between countries in labor market institutions and the relationship with flexible labor.

Although much statistical information exists – by amongst others OECD, Eurostat, CIETT, ILO and national Statistical Offices – detailed internationally comparable statistics (both time series and cross section data) on flexwork are scarce. A problem with these national statistics is that definitions might differ considerably between countries and that they are adjusted frequently. Another problem is that the distinguished countries, the frequency and the topics covered vary between sources. For Randstad Holding these were reasons to start a project in September 2000 with the aim of collecting labor market data in general and data on flexible forms of labor in particular.

The project resulted in the **I**nternational **D**atabase of **E**mployment and **A**daptable **L**abor (IDEAL). This database is created by SEO Economic Research in co-operation with and commissioned by Randstad Holding. The aim of IDEAL was to bring together a large number of *comparable* international statistics on employment, modern labor relations and agency work. In May 2004 this resulted in the first publication of the Randstad Jobs Report, in which an international outlook was presented mainly based on data as recent as the year 2002. In 2007 an update followed, with a special focus on labor migration, and in 2010 the third report with all 27 EU countries present. Starting from this year, new editions will be published every year under the name Flexibility@Work.

Data comparability issues

The main focus of Flexibility@Work is on international comparability between statistics. For that reason the countries in the database are separated into three categories, representing three different levels of comparability. The primary source is Labor Force Survey (LFS) data from Eurostat: they are to a large degree based on comparable definitions, and also published frequently and on relatively short term. Figures of these countries can be compared with averages for the EU-27 as a whole. Eurostat focuses mainly on the European countries, so for other countries similar data is taken from the OECD. Although in the use of definitions this source is more or less comparable with Eurostat, the publication horizon is much longer. Most statistics are annual and published in the second half of the following year, so they are often less up-to-date. If neither Eurostat nor OECD can provide information, tertiary sources are considered, but at an enormous cost of comparability loss. Tertiary sources (like ILO) are collected from very different sources, mostly infrequent and therefore not very recent. Differences in national definitions make these statistics only suitable for within-country purposes, not for between-country comparisons. These tertiary sources are therefore only used if they contain valuable information that is comparable with the other sources.

Statistics are presented in nearly all tables and figures for the following countries:

- Austria (AT)
- Belgium (BE)
- Germany (DE)
- Denmark (DK)
- Spain (ES)
- Finland (FI)
- France (FR)
- Greece (GR)
- Ireland (IR)
- Italy (IT)
- Luxembourg (LU)
- Netherlands (NL)
- Portugal (PT)
- Sweden (SE)
- United Kingdom (UK)
- Cyprus (CY)
- Czech Republic (CZ)
- Estonia (EE)
- Hungary (HU)
- Lithuania (LT)
- Latvia (LV)
- Malta (MT)
- Poland (PL)
- Slovenia (SI)
- Slovakia (SV)
- Bulgaria (BG)
- Romania (RO)

Where available statistics are also presented for the following countries:
- Australia (Aus)
- Canada (Can)
- Japan (JP)
- Norway (NO)
- Mexico (MX)
- Turkey (TR)
- Switzerland (CH)
- United States (US)

appendix C fixed-term contracts

Table C.1 Percentage of employees with a fixed-term contract

	1990	1995	2000	2005	2006	2007	2008	2009	2010	2011	2012
Austria		6.0	8.6	8.8	8.7	8.8	8.7	8.6	8.9	9	9
Belgium	5.3	5.3	9.0	9.1	8.8	8.8	7.7	8.2	7.5	8.8	8.1
Germany	10.5	10.4	12.8	13.9	14.2	14.3	14.7	14.3	14.6	14.7	13.8
Denmark	10.8	12.1	10.2	9.9	9.6	9.5	8.8	9.0	8.5	9.2	8.6
Spain	29.9	35.0	32.4	33.3	34.4	31.9	29.4	25.3	24.9	25.6	23.7
Finland		16.5	17.7	18.1	18.0	17.3	16.9	15.9	16.8	16.7	17.3
France	10.6	12.2	15.4	14.0	15.1	15.1	15.0	14.3	15.2	15.3	15.3
Greece	16.5	10.2	13.8	12.1							
Ireland	8.5	10.2	5.3	2.5	7.5	9.2	8.0	8.2	9.2	10.2	9.9
Italy	5.2	7.2	10.1	12.4	13.0	13.4	13.9	12.8	12.9	13.7	14.2
Luxembourg	3.4		3.4	5.3	6.1	6.9	7.7	7.4	6.6	6.4	7.5
Netherlands	7.6	10.8	13.8	15.1	16.1	17.9	18.0	17.9	18.5	18	19.1
Portugal	18.4	10.1	19.8	19.5	20.2	22.2	23.3	21.7	23.0	22.8	21
Sweden		13.0	14.3	16.0	17.3	17.7	16.4	15.5	15.8	16.3	15.8
UK	5.1	6.9	6.6	5.4	5.5	5.7	5.2	5.4	6.1	6.1	6.1
Cyprus			10.7	13.9	13.9	12.9	14.4	14.2	14.5	14	15.3
Czech Rep.			7.2	8.0	8.1	7.9	7.4	7.4	8.2	8	8.3
Estonia			2.3	3.3	3.3	2.3	1.8	2.3	4.2	4.7	3.1
Hungary			6.8	7.2	6.7	7.5	7.8	8.2	9.7	9.2	9.6
Lithuania			3.8	5.1	4.7	3.7	2.7	2.7	2.6	3.6	3
Latvia			6.7	8.4	7.1	5.3	2.8	3.7	6.7	7.4	4.7
Malta			3.9	4.0	3.8	5.5	4.1	4.9	4.9	5.2	6.6
Poland			5.6	25.4	27.1	28.1	26.9	26.5	27.0	27	27.5
Slovenia			12.8	16.8	17.9	18.5	16.9	16.4	17.7	17.5	16.7
Slovakia			4.0	4.9	5.0	5.3	4.0	4.1	5.7	6.6	6.9
Bulgaria				6.3	6.2	5.7	5.1	5.2	4.8	4.1	4.8
Romania			2.9	2.6	1.9	1.6	1.3	0.9	1.1	1.9	1.9
Switzerland			11.6	12.8	13.5	12.9	13.2	13.3	13.2	13.1	12.9
Norway		13.2	9.7	9.6	10.2	9.7	9.3	8.1	8.8	8.1	8.5
Turkey					13.3	13.0	12.2	11.3	12.2	13.3	12.6
EU27			12.2	13.9	14.5	14.6	14.2	13.5	14.0	14.2	13.9

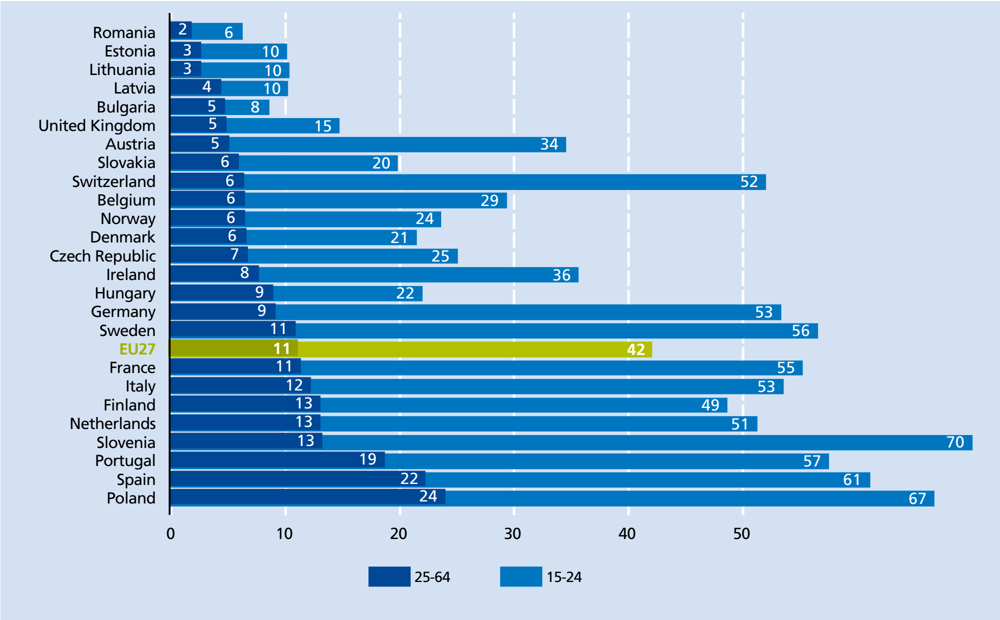
Source: Eurostat LFS (lfsq_etpga, 2012)

Table C.2 Distribution of fixed-term contracts over economic sectors2012 (NACE rev2, column-percentages)

	Netherlands	Germany	Francea	Greece	Italy	Spain	Portugal	Sweden	UK	EU27
Agriculture	2	1	2	.	11	7	4	1	.	4
Manufacturing	7	17	11	.	15	9	16	6	8	14
Public utilities	1	1	1	.	1	1	.	.	1	1
Construction	4	5	8	.	7	9	10	4	4	7
Trade & repair	19	13	10	.	11	11	11	12	9	13
Transport	5	4	3	.	3	3	4	5	4	4
Information/ commun.	3	3	2	.	2	3	3	2	3	2
Hotels & restaurants	9	5	5	.	13	11	7	8	8	7
Financial services	2	2	1	.	1	1	1	1	2	1
Business services	10	11	10	.	9	9	8	14	11	10
Public administration	3	8	10	.	3	6	6	5	4	6
Education	6	11	10	.	11	8	14	14	22	10
Health	14	16	14	.	6	10	9	19	15	11
Other	4	4	10	.	7	10	7	7	7	7
Non respons	10	.	1	.	.	.	.	1	2	1
Total	100	100	100	100	100	100	100	100	100	100
Temporary workers (% of total employment)	**16**	**12**	**14**	**.**	**11**	**20**	**17**	**14**	**5**	12

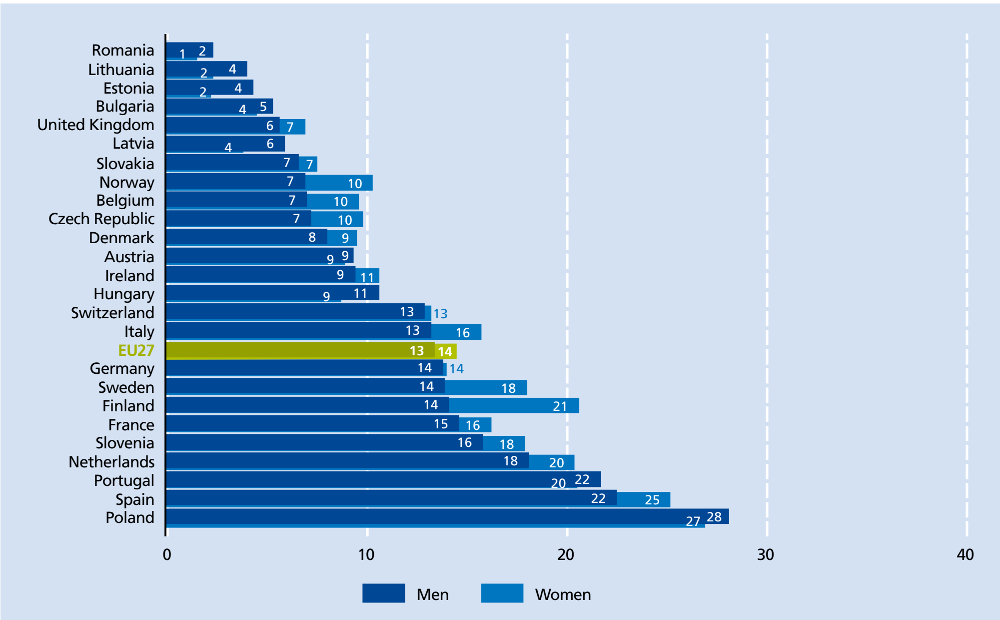
Source: Eurostat LFS (lfsq_etgan2, 2012)

Figure C.1 The share of fixed-term contracts does vary between age classes…



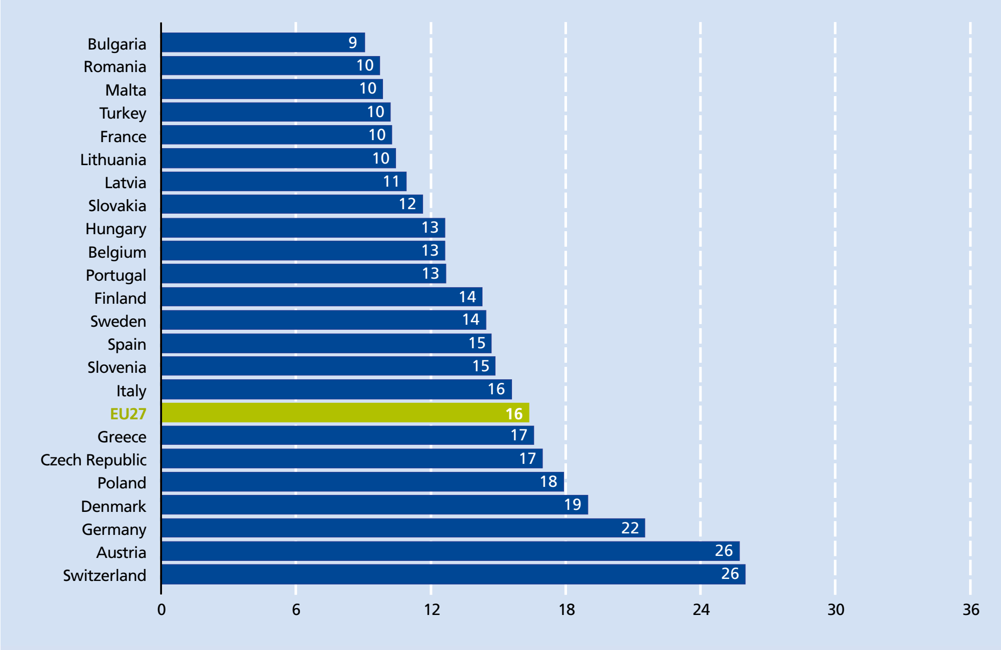
Source: Eurostat LFS (lfsq_etpga, 2012)

Figure C.2 …but less between the sexes, 2012 (percentages)



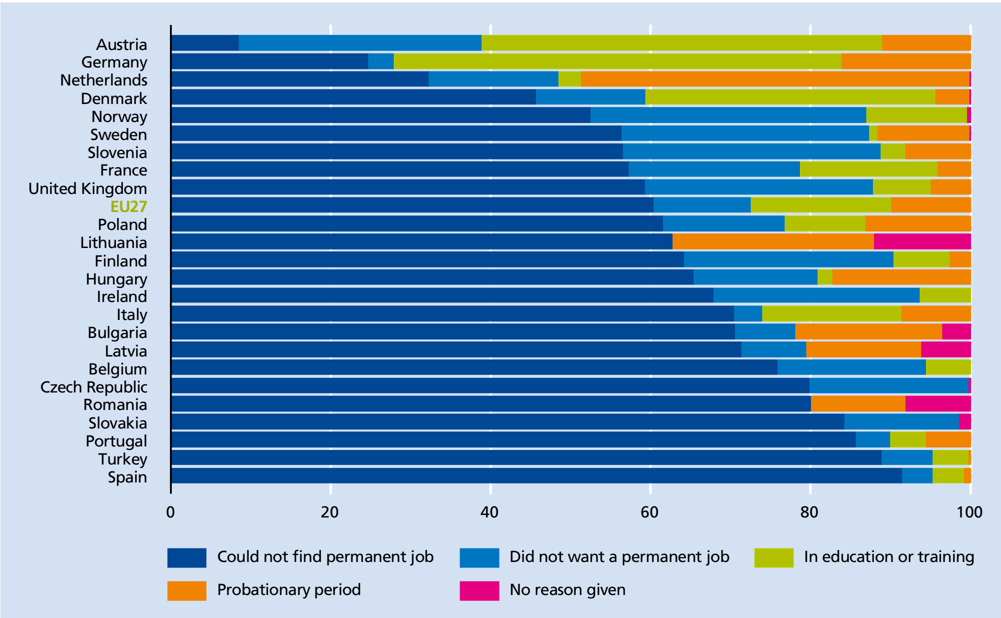
Source: Eurostat LFS (lfsq_etpga, 2012)

Figure C3 Average duration of fixed-term contracts, 2010 (years)



Source: Eurostat LFS (lfsq_etgadc, 2012)

Figure C.4 Reasons for working on a fixed-term contract, 2011 (percentages)



Source: Eurostat LFS (lfsa_etgar, 2012)

Figure C.5 Fixed-term contracts more prominent among low skilled workers (percentages)

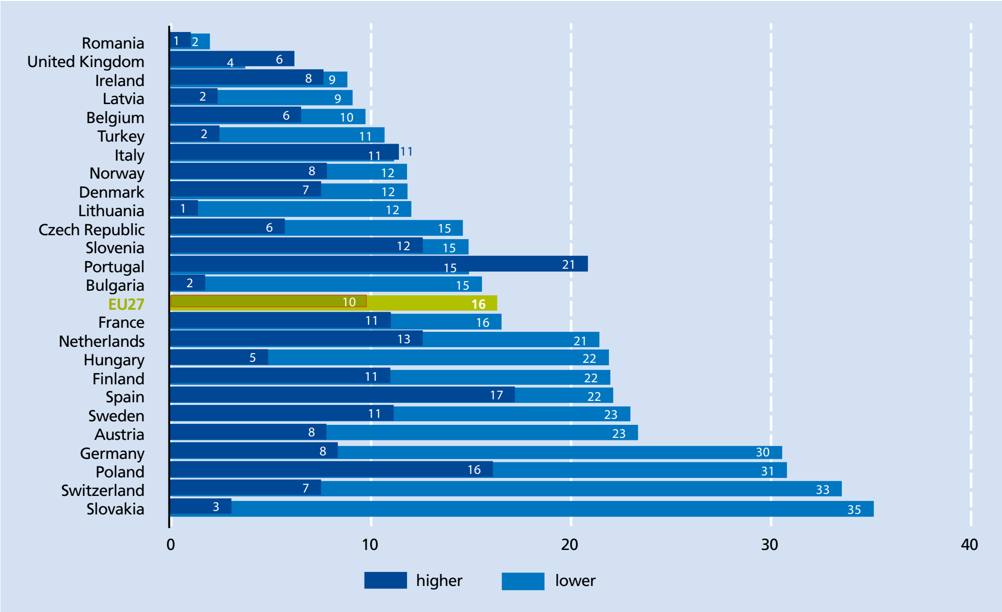
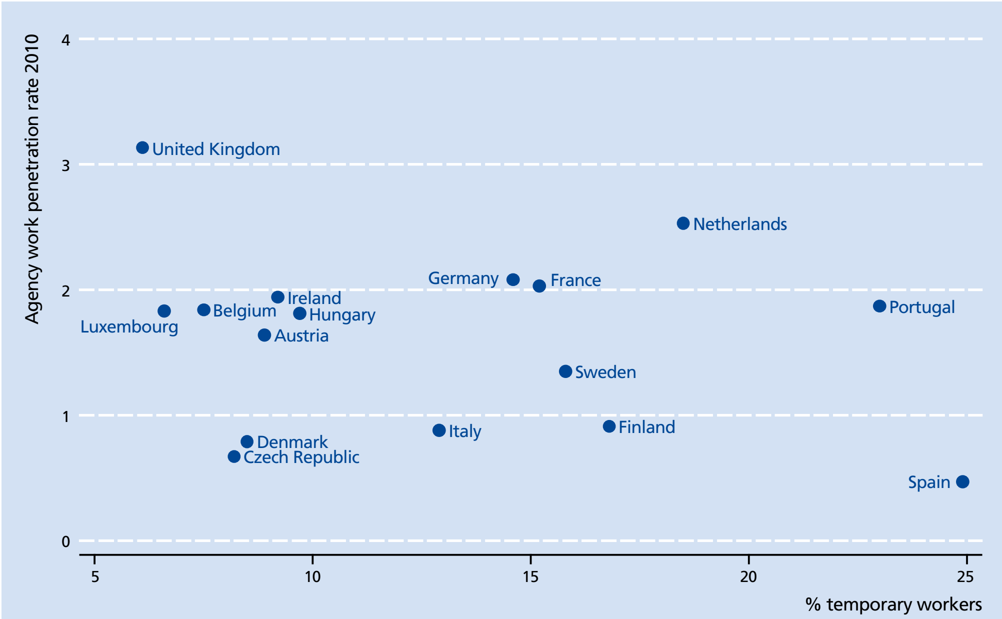


Figure shows the percentage of fixed-term contracts among higher skilled and lower skilled employees.
Source: Eurostat LFS (lfsq_etgaed, 2012; lfsq_egaed, 2012)

Figure C.6 'Fixed-term contracts' are not the same as 'temporary agency work'



Source: Eurostat LFS (lfsq_etpga, 2012), Ciett (2012)

appendix D agency work

Table D.1 Number of temporary agency workers (daily FTE x 1,000)

	1996	1998	2000	2002	2004	2006	2007	2008	2009	2010	2011
Austria	15	21	30	31	44	59	59	68	57	66	75
Belgium	44	60	71	66	73	88	95	92	72	82	90
Czech Rep.						35		35	36	32	35
Denmark	5	7	8	10	13	21	17	21	18	21	21
Finland	9	9	9	11	14	18	28	32	20	22	31
France	291	458	604	570	570	603	638	604	447	520	576
Germany	176	246	328	318	385	580	715	760	625	793	813
Hungary				30	53	55	55	55	22	68	65
Ireland	3	9	25	25	25	30	35	35	18	35	46
Italy		10	69	82	154	184	222	225	162	197	225
Luxemburg	2	2	4	4	4	5	5	4	4	4	4
Netherlands	147	180	183	169	157	207	233	242	213	208	215
Norway	7	11	11	11	12	24	25	26	20	22	22
Poland					25	35	60	90	72	114	161
Portugal	25	33	45	45	45	45	45	85	80	87	80
Spain	60	110	114	105	122	144	150	126	82	87	87
Sweden	10	18	42	37	30	37	59	59	46	60	65
Switzerland	21	30	39	37	41	61	70	69	57	66	73
UK	682	696	1,027	1,036	1,175	1,265	1,378	1,220	1,068	880	1,049
subtotal Europe	1,497	1,900	2,610	2,587	2,942	3,496	3,889	3,848	3,120	3,364	3,734

Source: SEO calculations based on Ciett 2012 and Eurostat Labor Force Statistics 2012

Table D.2 Temporary agency work penetration rate within Europe (percentages)

	1996	1998	2000	2002	2004	2006	2007	2008	2009	2010	2011
Austria	0.4	0.6	0.8	0.8	1.2	1.5	1.5	1.7	1.4	1.6	1.8
Belgium	1.2	1.6	1.7	1.6	1.8	2.1	2.2	2.1	1.6	1.8	2.0
Czech Rep.		0.0				0.7		0.7	0.7	0.7	0.7
Denmark	0.2	0.3	0.3	0.4	0.5	0.8	0.6	0.8	0.7	0.8	0.8
Finland	0.4	0.4	0.4	0.5	0.6	0.7	1.1	1.3	0.8	0.9	1.3
France	1.3	2.1	2.6	2.4	2.4	2.4	2.5	2.3	1.8	2.0	2.3
Germany	0.5	0.7	0.9	0.9	1.1	1.6	1.9	2.0	1.6	2.1	2.1
Hungary		0.0		0.8	1.4	1.4	1.4	1.4	0.6	1.8	1.7
Ireland	0.2	0.6	1.5	1.4	1.4	1.5	1.7	1.7	1.0	1.9	2.6
Italy		0.0	0.3	0.4	0.7	0.8	1.0	1.0	0.7	0.9	1.0
Luxembourg	1.2	1.2	2.2	2.1	2.1	2.6	2.5	2.0	1.9	1.8	1.9
Netherlands	2.1	2.4	2.3	2.1	1.9	2.5	2.8	2.9	2.5	2.5	2.6
Norway	0.3	0.5	0.5	0.5	0.5	1.0	1.0	1.1	0.8	0.9	0.9
Poland		0.0			0.2	0.2	0.4	0.6	0.5	0.7	1.0
Portugal	0.6	0.7	0.9	0.9	0.9	0.9	0.9	0.9	1.0	1.9	1.8
Spain	0.5	0.8	0.9	0.7	0.7	0.7	0.8	0.7	0.8	0.5	0.5
Sweden	0.3	0.5	1.0	0.9	0.7	0.9	1.3	1.3	1.0	1.4	1.4
Switzerland	0.6	0.8	1.0	0.9	1.0	1.5	1.7	1.7	1.4	1.6	1.7
UK	2.6	2.6	3.8	3.8	4.2	4.5	4.8	4.3	3.8	3.1	3.7
subtotal Europe	1.0	1.1	1.4	1.4	1.6	1.8	1.9	1.9	1.6	1.7	1.9

Source: SEO calculations based on Ciett 2012 and Eurostat Labor Force Statistics 2012

Table D.3 Temporary agency work penetration rate outside Europe (percentages)

	1996	1998	2000	2002	2004	2006	2007	2008	2009	2010	2011
Argentina		0.5	0.5	0.3	0.6	0.5	0.5	0.5	0.3	0.4	0.4
Australia						0.9	1.0	1.0	1.0	1.0	1.1
Brazil						1.3	0.5	0.4	0.4	0.4	
Chile						1.9	2.1	2.2	1.7	1.5	1.6
Japan	0.5	0.5	0.8	1.1	1.4				0.1	0.1	0.3
Mexico						2.3	2.3	3.6	7.0	7.4	
South Africa						0.3	0.3	0.3	0.4	0.4	0.4
South Korea					0.2	2.2	2.1	1.9	1.6	1.9	2.0
USA	2.0	2.3	2.4	1.9	2.2	0.5	0.5	0.5	0.3	0.4	0.4

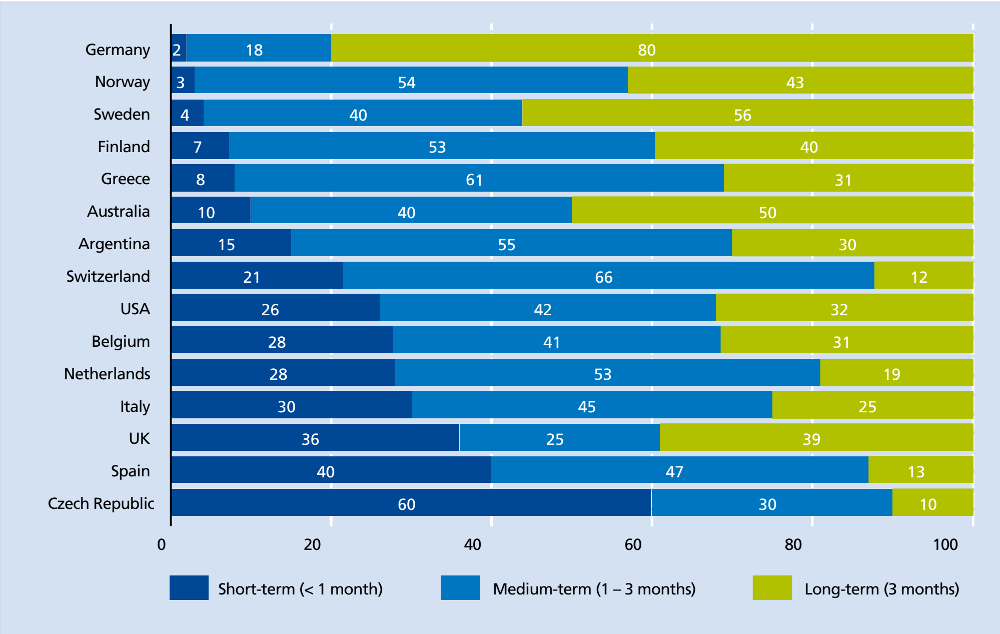
Source: SEO calculations based on Ciett 2012 and OECD 2012a

Table D.4 Temporary agency workers: gender composition, 2010 (percentages)

	male		male
Austria	80	Netherlands	53
France	72	Romania	52
Germany	70	Poland	49
Switzerland	62	Czech Republic	48
Belgium	60	Greece	47
Slovakia	57	USA	44
Spain	56	UK	42
Slovenia	56	Sweden	40
Mexico	54	Denmark	39
Italy	54	Japan	37
Austria	80	Finland	34
France	72	Australia	30
Germany	70	Netherlands	53

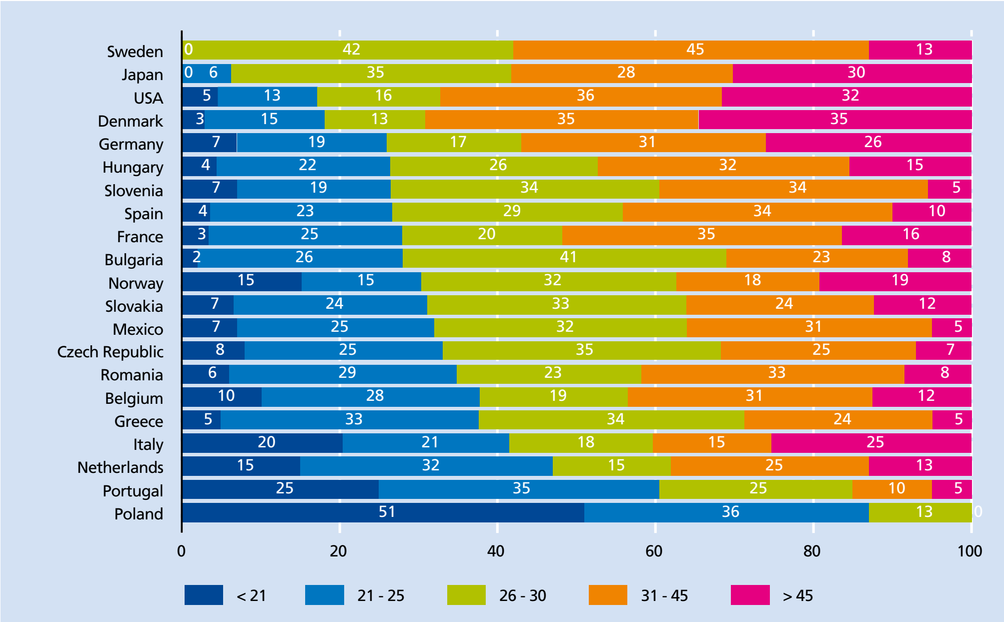
Source: Ciett (2012)

Figure D.1 Temporary agency workers: average length of assignment (percentages)



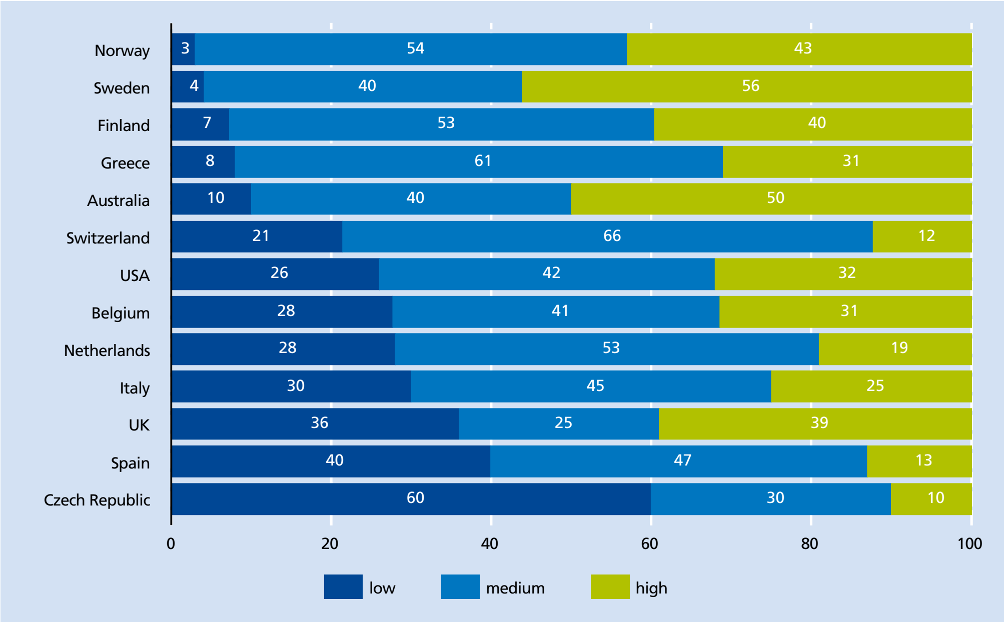
Source: Ciett (2012). The length of an assignment refers to the duration spent executing a specific job in one single company. A contract can be renewed several times, depending on the legal obligations of the country in question, to fulfil one single assignment. If the worker changes function in the same company, or executes the same job in another company, then the assignment is said to have changed.

Figure D.2 Temporary agency workers: age distribution (percentages)



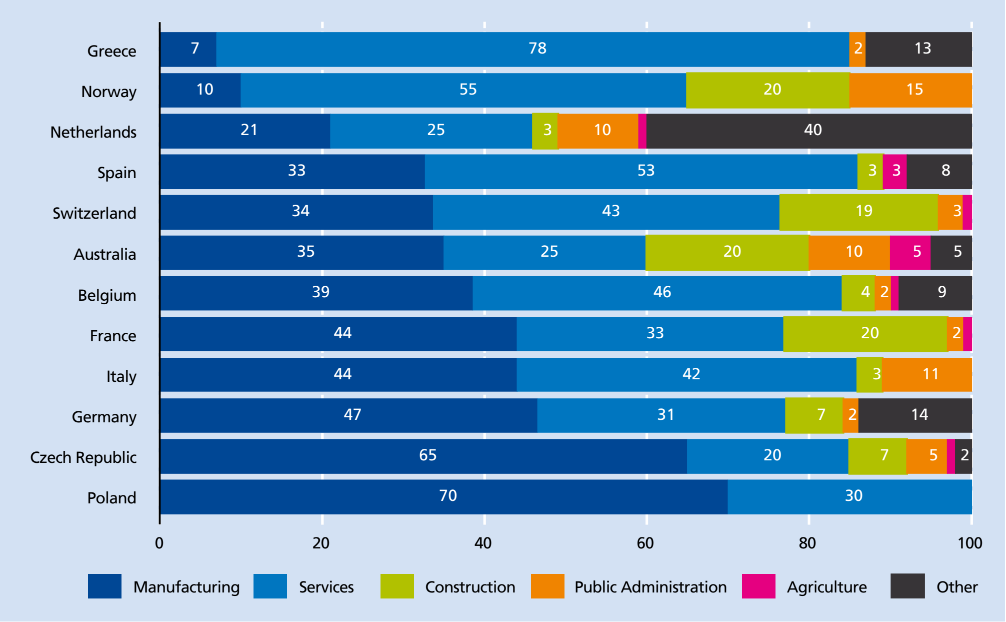
Source: Ciett (2012)

Figure D.3 Temporary agency workers: educational level (percentages)



Source: Ciett (2012)

Figure D.4 Temporary agency workers: sectoral distribution (percentages)



Source: Ciett (2012)

appendix E self-employment

Table E.1 Total self-employment (employers plus own account-workers), as percentage of total employment

	1998	2000	2005	2006	2007	2008	2009	2010	2011	2012
Austria	10.8	10.4	11.7	11.5	11.8	11.2	11	11.2	11.5	10.9
Belgium	15.2	13.6	13	12.8	12.8	12.7	12.6	12.5	13	13.4
Germany	9.6	9.7	10.8	10.5	10.4	10.2	10.4	10.5	10.6	10.6
Denmark	8.3	8	7.7	8.5	8.3	8.1	8.5	8.3	8.3	8.2
Spain	19.6	17.8	16.3	16.4	16.2	16.2	15.7	15.7	15.4	16.2
Finland	13.6	12.6	11.6	12	11.7	11.6	12.5	12.1	11.9	12.1
France	10.7	10	9.6	10.5	10.2	9.9	10	10.6	10.9	10.7
Ireland	17.7	16.7	15.7	14.8	15.3	15.5	16	15.4	15.2	15
Italy	23.8	23.6	24.3	23.8	23.6	23.1	22.8	23.1	22.9	22.7
Luxembourg	8.4	8.7	7.7	7.6	6.3	6.2	7.2	6.8	7.4	7.1
Netherlands	10.4	10	11.2	11.5	12	12.2	12.2	13.9	13.6	13.9
Portugal	22.8	20.3	20.1	19.4	18.9	18.6	18.8	17.3	16.4	16.8
Sweden	10.1	9.8	9.6	9.7	9.7	9.4	9.4	9.8	9.5	9.1
UK	11.7	11.5	12.2	12.3	12.4	12.5	12.6	12.8	12.8	13.5
Cyprus		20.1	19.9	18.1	17.3	16.9	16.8	15.6	15.2	13.4
Czech Rep.	12.9	14.4	15.3	15.3	15.4	15.3	15.8	16.9	17	17.9
Estonia	7.9	8	7.4	7.9	9.2	7.1	7.5	7.1	8.3	8.3
Hungary	15.1	14.4	13.5	12.1	11.7	11.7	11.8	11.8	11.5	10.9
Lithuania	15.3	15.7	14.4	13.9	12.1	10.1	10.3	9.2	8.8	9.6
Latvia	10.9	10.2	9.5	11.2	9.3	8.2	10.4	9.7	9.5	9.6
Malta		11.9	13.5	14.1	13.8	12.8	13.5	13.7	13.7	13.8
Poland	21.8	21.8	19.9	19.6	18.8	18.9	18.7	18.4	18.6	18.3
Slovenia	11.8	10.3	9.2	10.4	10.2	9.3	10.8	11.3	12.7	11.4
Slovakia	6.7	7.7	12.7	12.6	12.6	13.3	15.6	15.8	15.5	15.4
Bulgaria		13.8	12.2	11.7	10.9	11.2	11.4	11.7	11	10.6
Romania	18.1	20.2	18.9	18.5	18.7	18.6	18.7	19.9	17.8	18.1
Switzerland	14.4	15	13.4	13	13.1	13.1	12.2	12.3	12.5	12.5
Norway	7.4	6.9	6.9	7.7	7.5	7.1	7.5	7.4	6.6	6.3
Turkey				26.5	25.7	24.6	25.1	24.1	23.4	22.7
EU27		14.6	14.6	14.6	14.4	14.3	14.3	14.6	14.4	14.5
Australia		13.6	12.7	12.2	11.8	11.6	11.6	11.6	11.2	
Canada		10.6	9.5	9.2	9.3	9.1	9.5	9.2	9.0	
Japan		16.6	14.7	13.8	13.4	13.0	12.7	12.3	11.9	
Mexico		36.0	35.5	34.5	34.3	33.9	33.8	34.7	33.7	
US		7.4	7.5	7.4	7.2	7.0	7.1	7.0		

Source: Eurostat LFS (lfsq_esgaed, 2012)

Table E.2 Own-account workers (self-employment without employers) as percentage of total employment

	1998	2000	2005	2006	2007	2008	2009	2010	2011	2012
Austria	5.7	5.4	7	6.8	6.7	6.4	6.3	6.6	6.7	6.4
Belgium	13.4	9.2	8.3	8.4	8.3	8.5	8.2	8.6	8.7	9.2
Germany	4.7	4.8	6.1	5.9	5.7	5.7	5.7	5.8	5.9	5.9
Denmark	4	3.8	4.1	4.2	4.3	4.2	4.7	5	4.8	4.8
Spain	14.5	12.2	11.2	11	10.9	10.6	10.1	10.2	10.3	11.1
Finland	10	8.3	7.7	8	7.6	7.9	8.5	8	7.9	8
France	6.1	5.7	5.4	6	5.9	5.3	5.7	6.3	6.5	6.5
Greece	24.1	23.5	21.5	21.1	20.8	20.3	20.7	21.5	22.4	24.2
Ireland	11.7	10.9	10.1	9.5	9.5	10	10.4	10.4	10.4	10.3
Italy	11.7	11.1	17.2	16.9	16.7	16.4	16.1	16.7	16.5	16.4
Luxembourg	3.4	2.7	4.9	4.9	3.8	3.9	4.4	4	4.7	4
Netherlands	6.4	6.9	7.5	7.8	8.1	8.4	8.6	10	9.8	10.1
Portugal	16.6	14.1	14.1	13.9	13.4	13.1	13.4	12.3	11.5	12
Sweden	6.2	5.9	5.7	5.9	5.9	5.7	5.9	5.9	5.8	5.3
UK	8.7	8.3	9.4	9.4	9.7	9.8	10	10.3	10.5	11
Cyprus		14	12.5	11.9	11.4	11.6	11.8	10.7	10.8	9.5
Czech Rep.	8.8	10.2	11.5	11.3	11.6	11.8	12.1	13.3	13.4	14.5
Estonia	5.2	4.9	5	5.5	5.8	4.1	3.9	4	3.5	4.5
Hungary	12.4	9.4	7.4	6.6	6.6	6.7	6.6	6.3	6.3	5.7
Lithuania	11.7	14	12.4	11.6	10	8	8.2	7.1	6.4	7.6
Latvia	7.8	6.1	5.9	7.3	5.9	5.3	6.5	5.6	6.1	5.9
Malta		7.9	8.9	9.2	9.1	8.5	9	9.6	9.3	8.6
Poland	17.7	17.9	15.9	15.5	14.7	14.7	14.4	14.2	14.4	14.3
Slovenia	8.1	6.7	5.9	6.8	6.8	6.3	7	7.6	8.8	8.3
Slovakia	4.2	5.2	9.4	9.5	9.6	10.2	12.2	12.4	12.1	12.3
Bulgaria		11.5	8.3	7.8	7.2	7.6	7.9	8	7.3	7.1
Romania	16.7	19.1	17.2	16.8	17.2	17.2	17.1	18.6	16.6	16.8
Switzerland	7	7.1	7.1	6.9	7.2	7.1	6.6	6.4	6.6	6.4
Norway	5.6	5.2	5.4	5.9	5.5	5.2	5.3	5.2	4.7	4.6
Turkey				20.9	19.9	19	19.7	18.9	18.2	17.9
EU27		9.6	10.1	10.1	10	9.9	9.9	10.2	10.1	10.3

Source: Eurostat LFS (lfsq_esgaed, 2012)

Table E.3 **Own-account workers excluding the agricultural sector, as percentage of total employment**

	1998	2000	2005	2006	2007	2008	2009	2010	2011	2012
Austria	2.1	2.3	4.1	3.9	4.4	4.2	4.2	4.6	4.5	4.3
Belgium	12.1	8.3	7.4	7.5	7.6	7.8	7.7	7.9	8	8.6
Germany	4.1	4.3	5.6	5.5	5.3	5.3	5.4	5.5	5.6	5.6
Denmark	3.1	3	3.5	3.6	3.5	3.7	4.1	4.4	4.1	4.1
Spain	11.2	9.4	9.4	9.4	9.4	9.1	8.7	8.8	9	9.7
Finland	5.5	5.1	5.3	5.7	5.3	5.7	6.2	5.9	5.9	6.1
France	4.1	3.9	3.7	4.3	4.4	4.1	4.4	4.9	5.2	5.3
Greece	15.3	14.6	14.4	14.1	14.2	13.7	13.7	14.1	15.2	16.1
Ireland	6.7	6.4	6.7	6.3	6.5	6.9	7.6	7.9	7.9	7.8
Italy	10	9.8	15.8	15.6	15.4	15.2	14.9	15.6	15.4	15.3
Luxembourg	2.2	2	3.8	3.7	3	3.1	3.9	3.4	4.7	3.3
Netherlands	5.3	5.8	6.5	6.8	7.2	7.5	7.7	9.1	9	9.3
Portugal	10.2	8.9	9.1	8.8	8.7	8.3	8.5	7.6	7.2	7.7
Sweden	5	5	5	5.2	5.1	4.9	5.1	5.3	5.2	4.6
UK	8.1	7.9	8.9	9	9.2	9.4	9.6	9.9	10.1	10.6
Cyprus		12	11.2	10.9	10.1	10.3	10.6	9.9	9.8	8.9
Czech Rep.	8.2	9.5	10.9	10.7	11.1	11.3	11.6	12.6	12.7	13.8
Estonia	3.3	3.2	3.7	5.5	4.5	3.1	3.9	4	3.5	4.5
Hungary	9.8	7.1	6.2	5.5	5.6	5.6	5.5	5.3	5.4	4.6
Lithuania	3.6	3.2	4.2	5.2	4.8	5.2	4.8	3.7	3.2	3.9
Latvia	1.6	1.9	2.5	3.4	2.9	3.1	3.9	3.5	3.5	3.4
Malta		7.9	8.9	9.2	9.1	8.5	9	9.6	9.3	8.6
Poland	17.7	6.4	5.7	6	5.8	6.1	6.3	6.6	6.6	6.7
Slovenia	4.5	3.9	3.6	4	3.9	3.7	4.7	5.2	6.2	5.2
Slovakia	3.9	4.9	8.8	8.9	9.1	9.6	11.6	11.8	11.4	11.9
Bulgaria		5.2	4.4	4.2	3.9	4.4	4.9	5	4.3	4.5
Romania	2.3	2.6	3	3.2	3.9	4.3	3.5	4.3	4.9	4.4
Switzerland	6.1	6.3	5.9	5.8	5.9	5.9	5.7	5.5	5.7	5.6
Norway	3.6	3.3	4	4.4	4.2	4.1	4.3	4.1	3.8	3.7
Turkey				11.4	10.3	19	11	10.3	9.6	9.2
EU27			7.5	7.6	7.6	7.6	7.7	8	8.1	8.2

Source: Eurostat LFS (lfsq_esgan2, 2012)

appendix F Labor participation

Table F.1 Employment-population ratio's (age 15-64, percentages)

	1990	2000	2005	2007	2008	2009	2010	2011	2012
Austria	-	68.5	68.4	71.5	72.3	71.7	71.4	72.1	72.6
Belgium	54.4	60.9	61.0	61.6	62.0	61.5	61.5	62.5	61.8
Germany	66.4	65.3	65.8	68.7	70.3	70.8	71.0	72.5	72.7
Denmark	75.4	76.4	75.5	77.2	78.3	76.2	74.1	73.3	72.8
Spain	49.1	56.1	63.2	65.8	65.0	59.9	58.6	58.3	55.7
Finland	-	68.1	69.2	71.3	72.3	69.8	69.2	70.1	70.4
France	60.8	61.7	64.0	64.3	65.1	64.5	64.2	64.1	64.1
Greece	54.8	56.6	60.3	61.5	62.2	61.6	60.1	56.4	51.7
Ireland	51.9	64.5	67.1	69.0	68.1	62.2	60.4	59.5	59.1
Italy	53.9	53.4	57.8	58.9	59.2	57.9	57.2	57.3	57.1
Luxembourg	59.2	62.7	63.6	63.6	64.4	65.7	64.6	63.8	65.8
Netherlands	61.1	72.9	73.2	76.0	77.2	77.0	74.7	74.7	75.1
Portugal	65.5	68.2	67.6	67.6	68.6	66.7	65.7	64.8	62.5
Sweden	-	71.1	72.6	74.3	74.8	72.7	72.9	74.5	74.6
United Kingdom	71.1	71.0	71.5	71.2	71.6	69.6	69.3	69.4	69.8
Cyprus	-	65.4	68.7	71.2	71.1	70.2	69.8	69.0	64.9
Czech Republic	-	64.9	64.7	66.0	66.6	65.4	64.9	65.7	66.5
Estonia	-	60.3	64.9	69.7	69.8	63.8	59.5	64.3	67.1
Hungary	-	55.9	56.8	57.6	56.5	55.6	55.3	55.8	57.2
Lithuania	-	59.6	62.6	65.4	64.6	60.3	56.7	60.8	62.9
Latvia	-	57.4	63.0	67.6	69.5	61.4	58.9	61.4	62.4
Malta	-	54.5	53.6	55.2	55.3	54.9	55.9	57.3	58.5
Poland	-	55.1	52.2	56.8	58.9	59.3	59.3	59.7	60.0
Slovenia	-	62.7	66.0	68.3	68.3	67.6	66.5	64.4	63.8
Slovakia	-	56.3	57.4	60.4	61.7	60.4	58.6	59.6	59.8
Bulgaria	-	51.5	56.2	61.6	63.9	63.3	60.2	58.2	58.3
Romania	-	64.2	58.7	59.6	59.7	59.2	60.1	58.8	60.0
Switzerland	-	78.3	77.2	78.6	79.5	79.0	78.6	79.5	79.3
Norway	-	77.9	74.6	76.7	78.3	77.1	75.7	75.2	76.2
EU27	-	62.1	63.4	65.3	65.9	64.7	64.2	64.5	64.3
Canada	70.3	70.9	72.4	73.5	73.6	71.5	71.5	72.0	-
Japan	68.6	68.9	69.3	70.9	70.7	70.0	70.1	71.5	-
Turkey	54.5	48.8	45.9	45.9	46.3	44.7	47.3	49.2	49.9
United States	72.2	74.1	71.5	71.8	70.9	67.6	66.7	66.6	-
Australia	68.4	69.3	71.5	72.9	73.2	72.0	72.4	72.7	-
Mexico	-	-	-	61.1	60.7	59.8	59.7	60.0	-

Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012a)

Table F.2 Employment-population ratio's (age 20-64, percentages)

	2000	2005	2006	2007	2008	2009	2010	2011	2012
Austria	71.6	71.7	73.3	74.7	75.7	75.1	75.0	75.5	75.9
Belgium	66.3	66.4	65.9	67.3	67.8	67.1	67.1	68.0	67.2
Germany	68.7	69.3	71.1	72.9	73.7	74.1	74.9	76.4	76.8
Denmark	77.9	77.5	79.2	79.1	79.9	77.8	75.9	75.8	75.5
Spain	60.6	67.2	68.7	69.7	69.0	63.9	62.6	62.3	59.6
Finland	72.3	73.4	74.1	75.4	76.6	74.2	73.7	74.4	74.6
France	67.4	69.7	69.3	70.0	70.6	69.8	69.4	69.5	69.6
Greece	62.1	64.8	65.8	66.2	66.9	66.2	64.6	60.9	55.7
Ireland	70.1	72.4	73.2	73.8	73.0	67.5	65.5	64.4	64.1
Italy	57.1	61.8	63.0	63.1	63.4	62.3	61.5	61.5	61.3
Luxembourg	67.5	69.0	69.1	69.2	69.5	71.1	70.1	69.3	71.5
Netherlands	74.2	75.0	76.1	77.8	78.9	78.8	76.9	76.8	77.2
Portugal	73.4	72.5	72.9	72.5	73.6	71.7	70.5	69.8	67.2
Sweden	76.3	78.1	78.7	80.3	80.8	78.7	78.9	80.3	80.4
United Kingdom	73.9	74.9	75.1	75.2	75.4	73.6	73.4	73.6	74.0
Cyprus	72.0	74.7	75.8	77.3	77.1	76.2	75.7	74.9	70.7
Czech Republic	70.9	70.7	71.2	72.0	72.5	71.0	70.4	70.9	71.5
Estonia	67.4	72.7	76.7	77.0	77.1	70.3	65.0	69.6	72.2
Hungary	60.9	62.2	62.6	62.9	61.7	60.8	60.4	60.7	62.1
Lithuania	66.1	70.7	71.7	73.3	72.4	67.5	63.2	67.3	69.2
Latvia	63.4	70.1	72.9	74.2	76.8	67.4	64.7	67.0	67.5
Malta	57.5	57.8	58.0	59.1	59.4	58.7	59.7	61.4	62.6
Poland	61.1	57.8	59.6	62.6	64.7	64.9	64.6	64.9	65.1
Slovenia	68.5	71.4	72.1	73.1	72.9	72.1	70.7	68.6	68.1
Slovakia	63.0	64.3	65.8	67.0	68.3	66.6	64.5	65.2	65.2
Bulgaria	56.5	62.4	65.6	68.3	70.5	69.5	65.9	63.4	62.6
Romania	70.5	64.9	65.8	65.3	65.3	64.2	64.8	63.1	64.3
Switzerland	80.9	79.9	80.5	81.3	82.3	81.7	81.2	82.1	82.2
Norway	80.7	78.0	79.5	80.8	82.0	81.2	80.0	79.6	80.2
EU27	66.5	68.0	69.0	70.0	70.5	69.2	68.7	68.9	68.7

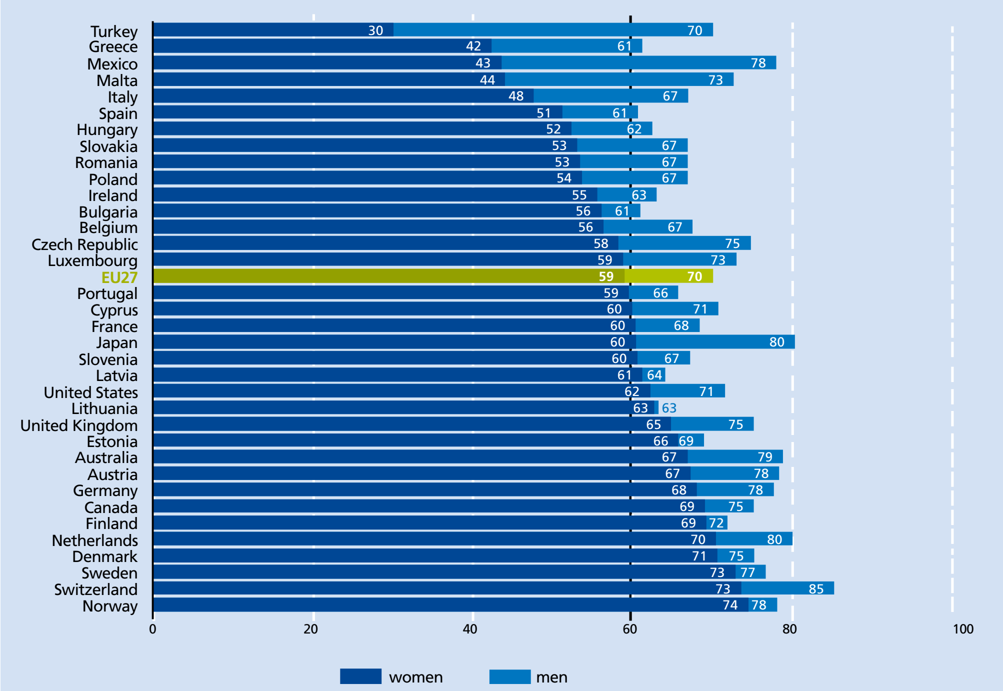
Source: Eurostat LFS (lfsq_ergan, 2012)

Table F.3 Female employment-population ratio's (age 15-64, percentages)

	1983	1990	1995	2000	2005	2010	2011	2012
Austria			59.2	59.2	61.7	65.8	66.2	67.1
Belgium	36.4	40.8	45.4	51.9	54.1	55.5	57.2	56.2
Germany	45.2	54	55.3	57.8	59.3	66.1	67.7	67.9
Denmark	64.3	70.7	67	72.1	70.8	72.0	70.8	70.5
Spain		30.7	31.7	41.2	51.2	52.2	52.8	51.0
Finland			58.1	65.2	67.4	68.0	68.2	69.1
France	50.5	50.9	52.1	54.8	58.7	60.0	59.9	60.2
Greece	34.4	37.5	38	41.8	46.2	48.7	45.7	42.2
Ireland	33.4	35.5	41.3	53.2	58.0	56.4	55.9	55.4
Italy	34	36.4	35.5	39.3	45.4	46.5	46.7	47.5
Luxembourg	38.6	41.4	42.2	50.0	53.7	56.8	56.2	58.6
Netherlands	34.5	46.7	53.2	63.4	66.3	69.3	69.9	70.3
Portugal		53.3	54.3	60.5	61.9	61.5	61.2	59.4
Sweden			69.8	69.7	70.5	70.4	72.1	72.7
United Kingdom	51.4	61.7	61.4	64.5	65.7	64.4	64.4	64.7
Cyprus				53.0	58.5	63.2	62.7	59.8
Czech Republic				56.8	56.0	56.1	57.1	58.1
Estonia				57.2	63.5	60.3	62.4	65.6
Hungary				49.4	50.9	50.6	50.5	52.2
Lithuania				58.2	59.2	57.9	60.8	62.6
Latvia				53.3	59.4	59.3	60.9	61.1
Malta				33.4	33.6	37.7	40.6	43.9
Poland				49.3	46.4	53.3	53.2	53.5
Slovenia				58.5	61.7	63.7	61.1	60.4
Slovakia				51.1	50.8	52.0	52.8	52.9
Bulgaria				47.2	52.3	56.6	55.8	55.9
Romania				59.0	52.6	53.2	52.5	53.3
Switzerland				69.3	70.4	72.3	73.6	73.4
Norway			67.7	73.9	71.4	73.7	73.5	74.3
Turkey		32.9	30.2	25.8	23.7	27.3	28.9	29.9
EU27				53.6	56.3	58.3	58.7	58.8
Canada	53.5	62.7	61.5	65.6	68.2	68.8	68.9	
Japan	53.0	55.8	56.4	56.7	58.1	60.1	60.3	
United States	56.2	64.0	65.8	67.8	65.6	62.4	62.0	
Australia	46.8	57.4	59.0	61.4	64.6	66.2	66.7	
Mexico					41.6	43.8	43.4	

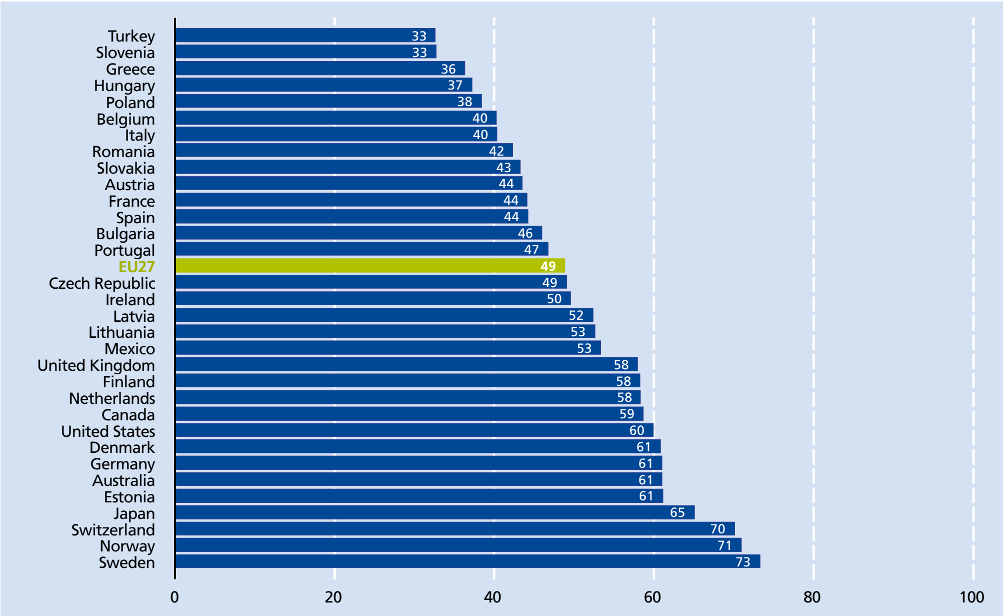
Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012)

Figure F.1 The gender gap in employment rates, 2012 (percentages)



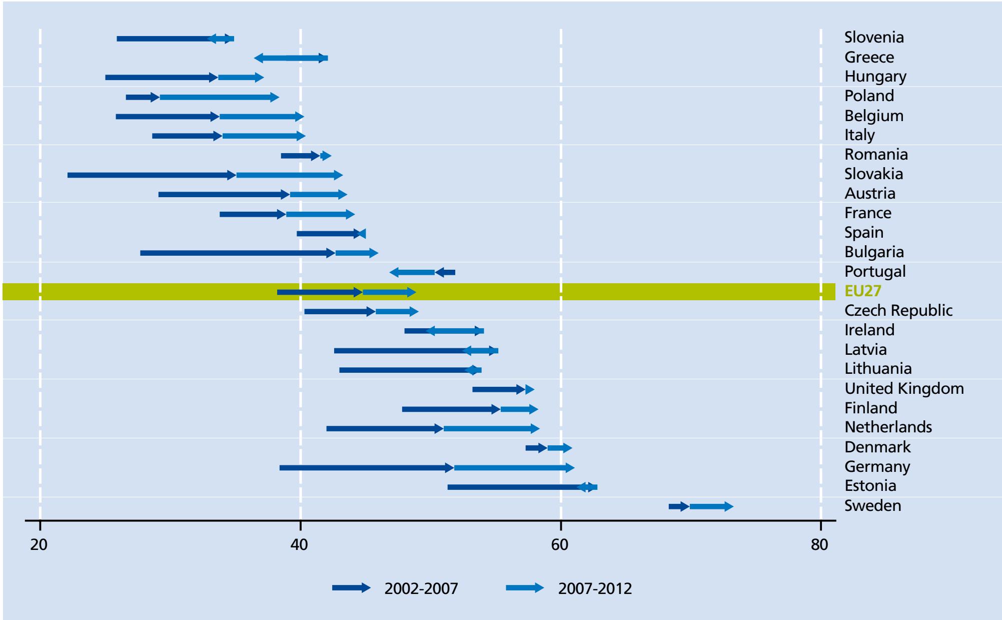
Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012a). Data for non-European countries concern 2011

Figure F.2 Employment rates of the elderly (age 55-64), 2012 (percentages)



Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012a)

Figure F.3 Development of the employment rate of the elderly (age 55-64, percentages)



Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012a)

Figure F.4 Development of the youth employment rate (age 15-24, percentages)

Source: Eurostat LFS (lfsq_ergan, 2012); OECD LFS (2012a)

appendix G part-time work

Table G.1 **Part-time employment according to OECD definition (less than 30 hours/week), as percentage of total employment**

	1990	1995	2000	2005	2007	2008	2009	2010	2011
Austria		11.1	12.2	16.3	17.3	17.7	18.5	19.0	18.9
Belgium	13.5	14.6	19.0	18.5	18.1	18.3	18.2	18.3	18.8
Germany	13.4	14.2	17.6	21.5	22.0	21.8	21.9	21.7	22.1
Denmark	19.2	16.9	16.1	17.3	17.3	17.8	18.8	19.2	19.2
Spain	4.6	7.0	7.7	11.0	10.7	11.1	11.9	12.4	12.9
Finland	7.6	8.7	10.4	11.2	11.7	11.5	12.2	12.5	12.7
France	12.2	14.2	14.2	13.2	13.3	12.9	13.3	13.6	13.6
Greece	6.7	7.8	5.5	6.4	7.7	7.9	8.4	8.8	9.0
Ireland	10.0	14.3	18.1	19.3	19.8	20.8	23.7	24.8	25.7
Italy	8.9	10.5	12.2	14.6	15.2	15.9	15.8	16.3	16.7
Luxembourg	7.6	11.3	12.4	13.9	13.1	13.4	16.4	15.8	16.0
Netherlands	28.2	29.4	32.1	35.6	35.9	36.1	36.7	37.1	37.2
Portugal	7.6	8.6	9.4	9.4	9.9	9.7	9.6	9.3	11.5
Sweden	14.5	15.1	14.0	13.5	14.4	14.4	14.6	14.0	13.8
UK	20.1	22.3	23.0	23.0	22.9	23.0	23.9	24.6	24.6
Czech Republic		3.4	3.2	3.3	3.5	3.5	3.9	4.3	3.9
Estonia			7.1	6.7	6.8	6.2	8.4	8.7	8.8
Hungary		2.8	2.9	3.2	2.8	3.1	3.6	3.6	4.7
Poland			12.8	11.7	10.1	9.3	8.7	8.7	8.3
Slovenia			-	7.4	7.8	7.5	8.3	9.4	8.6
Slovak Republic		2.3	1.9	2.6	2.6	2.7	3.0	3.7	4.0
Switzerland		22.9	24.4	25.1	25.4	25.9	26.5	26.1	25.9
Norway	21.8	21.4	20.2	20.8	20.4	20.3	20.4	20.1	20.0
Canada	17.0	18.8	18.1	18.4	18.3	18.5	19.3	19.4	19.9
Japan	19.2	20.1	-	18.3	18.9	19.6	20.3	20.2	20.6
Turkey	9.3	6.4	9.4	5.6	8.1	8.5	11.1	11.5	11.7
United States	14.1	14.0	12.6	12.8	12.6	12.8	14.1	13.5	12.6
Australia			-	24.0	23.8	23.8	24.7	24.9	24.7
Mexico			13.5	16.8	17.6	17.6	17.9	18.9	18.3

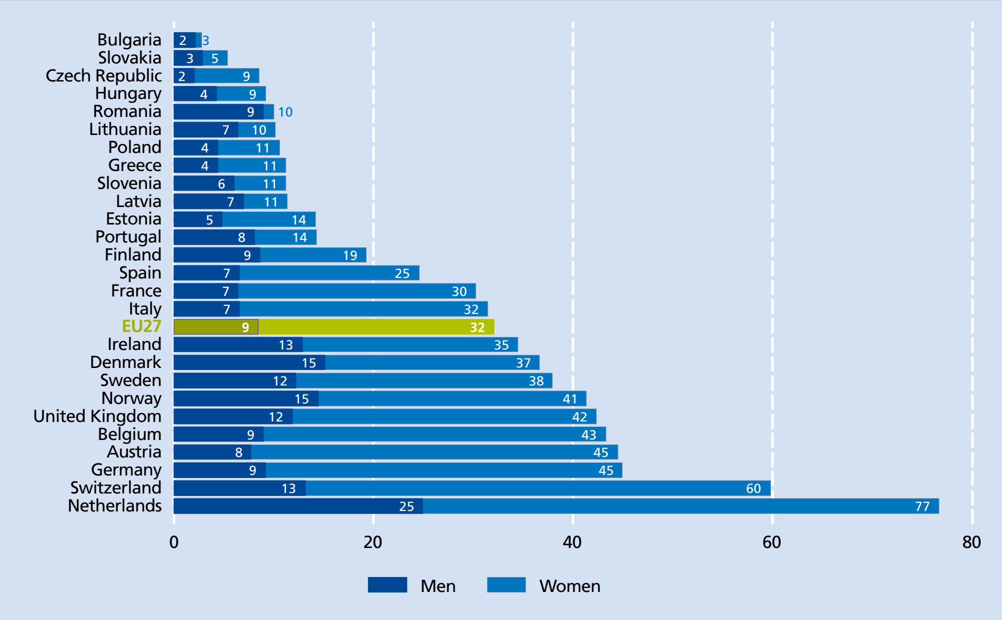
Source: OECD Employment Outlook (2012)

Table G.2 Part-time employment according to Eurostat definition (percentage of total employment)

	1990	1995	2000	2005	2007	2008	2009	2010	2011	2012
Austria		13.3	16.0	20.4	22.0	22.7	24.1	24.5	24.4	24.8
Belgium	10.9	13.6	20.6	21.7	22.5	22.4	23.0	24.1	25.1	24.5
Germany	14.9	16.0	19.1	23.6	25.6	25.4	25.5	25.7	25.9	25.8
Denmark	22.7	21.4	21.4	21.5	23.2	23.7	25.3	26.2	25.6	25.5
Spain	4.8	7.2	8.0	12.6	11.8	11.9	12.8	13.4	14.0	14.8
Finland		11.4	11.9	13.2	13.0	12.3	12.7	13.6	13.6	13.9
France	11.8	15.5	16.8	17.2	17.3	16.9	17.2	17.7	17.8	17.9
Greece			4.4	4.6	5.5	5.2	5.8	6.1	6.2	7.2
Ireland	8.0	12.0	16.6	16.8	17.6	18.0	20.5	21.6	22.7	23.1
Italy	4.7	6.4	8.7	12.6	13.3	14.4	14.2	14.8	15.3	17.0
Luxembourg	6.8	7.9	11.2	17.4	17.5	16.3	17.0	17.8	18.1	18.7
Netherlands	31.3	37.0	41.0	45.8	46.3	46.7	47.6	48.5	48.5	49.1
Portugal	5.0	6.3	8.1	8.4	8.9	8.8	8.6	8.5	9.7	11.1
Sweden		25.4	21.8	24.3	24.3	26.1	26.0	25.4	24.9	24.6
UK	20.8	23.2	24.4	24.6	24.2	24.2	25.0	25.7	25.6	26.1
Cyprus			7.6	7.5	6.1	6.6	7.3	7.8	8.6	9.4
Czech Rep.			4.8	4.3	4.4	4.3	4.8	5.2	4.7	4.9
Estonia			6.3	6.8	7.0	5.6	10.7	10.4	9.5	9.7
Hungary			3.4	4.1	3.8	4.1	5.2	5.3	6.5	6.5
Lithuania			8.9	6.3	7.9	6.3	8.2	7.7	7.7	8.4
Latvia			10.5	8.9	6.4	5.7	7.6	8.9	8.5	9.2
Malta			6.1	8.8	10.7	11.4	11.0	11.2	12.0	12.6
Poland			9.3	9.7	8.5	7.6	7.8	7.8	7.2	7.2
Slovenia			5.3	7.8	8.8	8.1	9.7	10.5	9.1	8.5
Slovakia			1.8	2.3	2.6	2.1	3.8	4.0	4.0	4.0
Bulgaria				2.3	1.7	1.9	2.3	2.2	2.3	2.5
Romania			14.0	9.6	8.6	8.8	8.6	10.5	9.4	9.5
Switzerland			29.3	32.2	32.5	33.3	33.7	34.3	33.8	34.6
Norway		27.3	25.7	28.0	27.7	27.8	28.3	28.2	27.8	27.3
Turkey					7.8	8.6	10.6	10.6	11.5	11.3
EU27			15.8	17.4	17.7	17.7	18.2	18.7	18.9	19.3
EU25			15.9	18.0	18.3	18.3	18.9	19.3	19.5	20.0
EU15		15.6	17.5	19.9	20.4	20.5	21.0	21.6	21.8	22.4

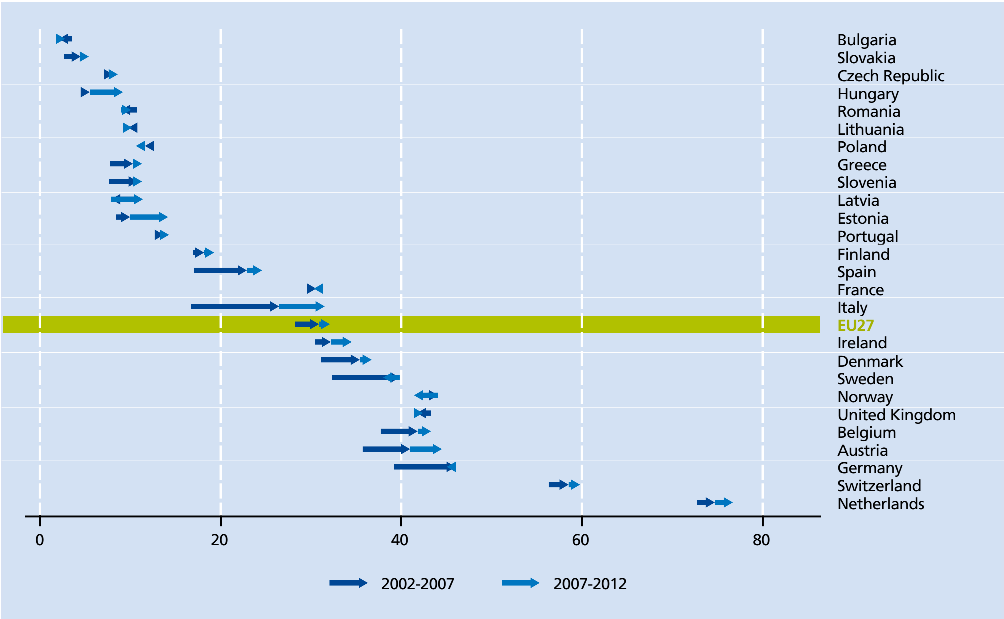
Source: Eurostat LFS (lfsq_eppga, 2012)

Figure G.1 Part-time work is a female phenomenon, 2012 (percentages)



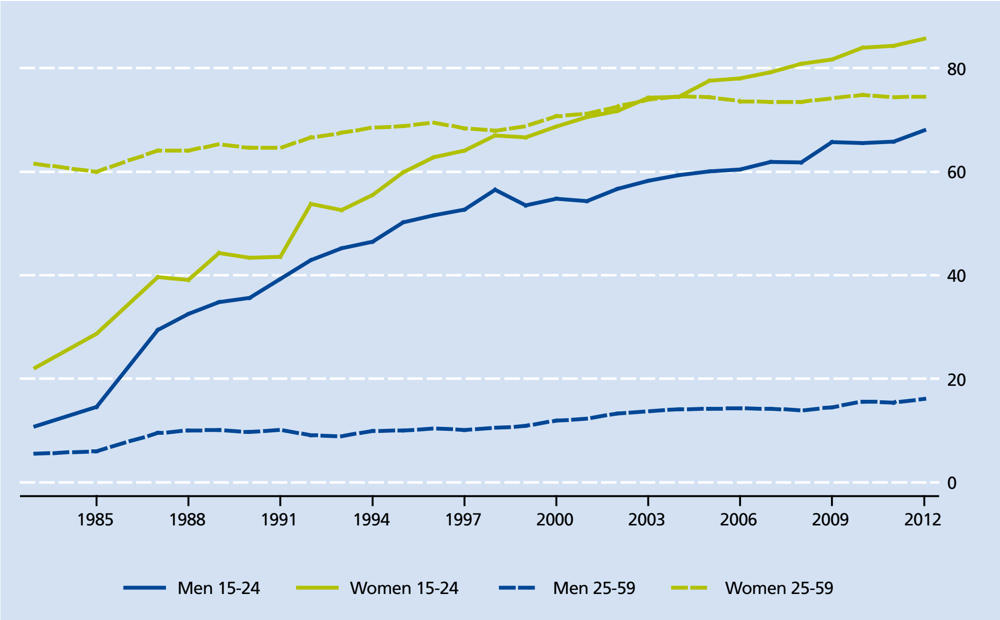
Source: Eurostat LFS (lfsq_eppga, 2012)

Figure G.2 Female part-time work still on the rise (percentages)



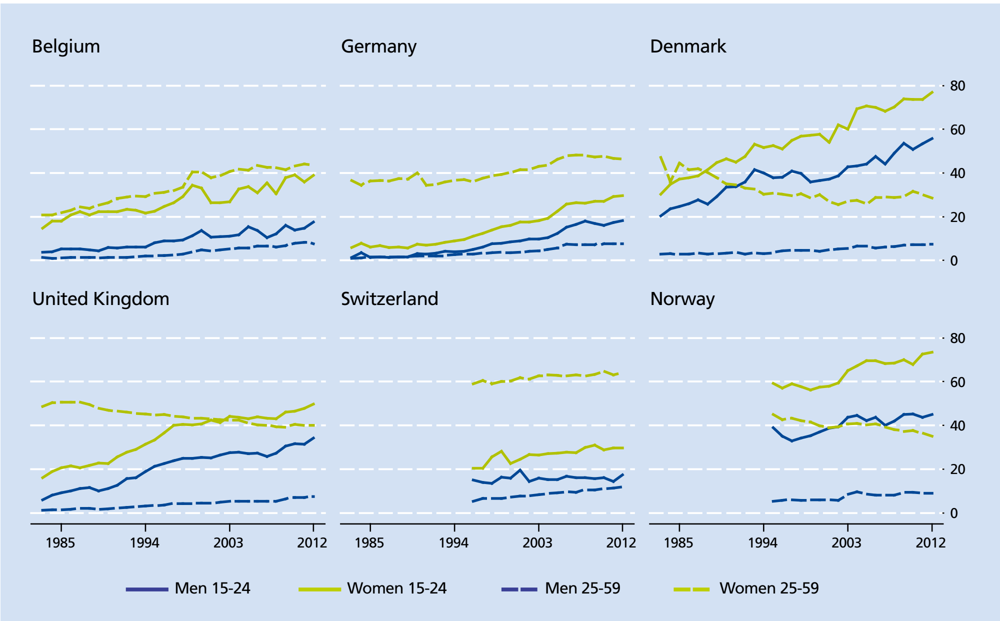
Source: Eurostat LFS (lfsq_eppga, 2012)

Figure G.3 Part-time growth in EU particularly strong amongst youth (percentages)



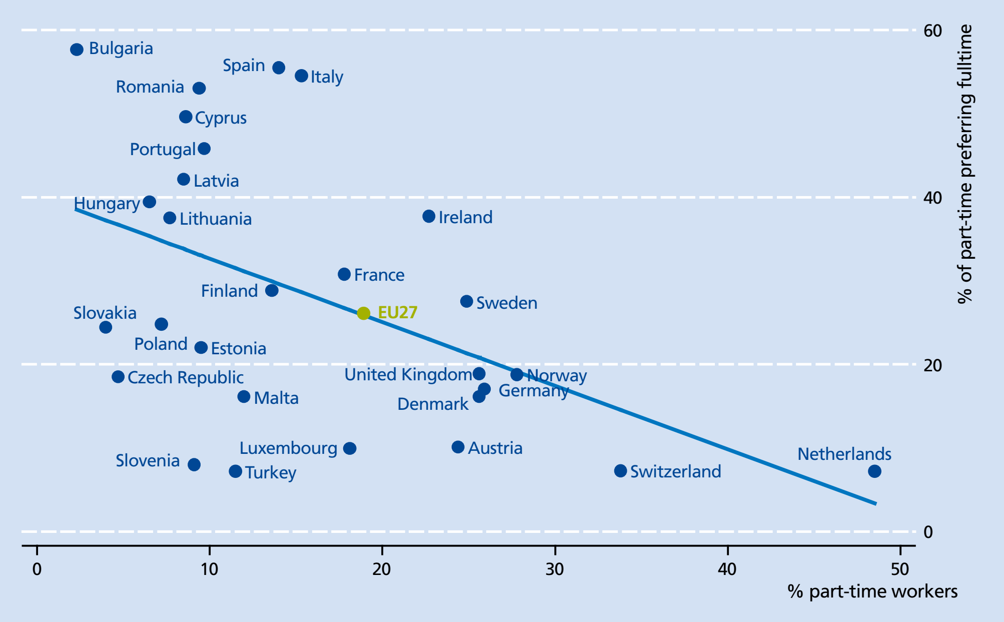
Source: Eurostat LFS (lfsq_eppga, 2012)

Figure G.4 Part-time growth in other countries (percentages)



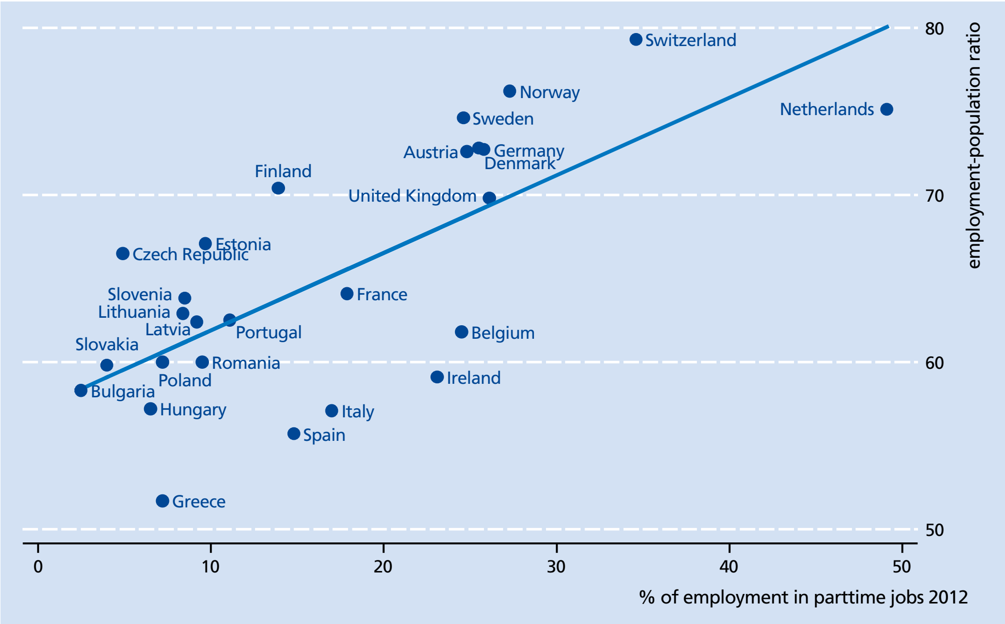
Source: Eurostat LFS (lfsq_eppga, 2012)

Figure G.5 Working part-time is a deliberate choice



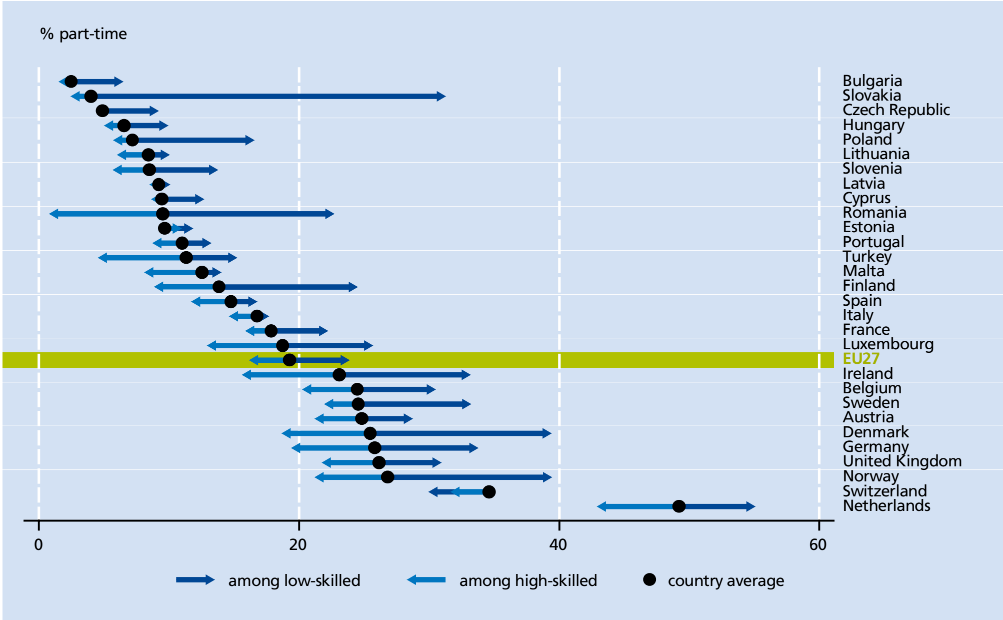
Source: Eurostat LFS (lfsq_eppga, lfsa_eppgai, 2012)

Figure G.6 Correlation between part-time jobs and employment participation



Source: Eurostat LFS (lfsq_eppga, lfsq_ergan, 2012)

Figure G.7 Part-time work is more prominent among low-skill workers



Source: SEO calculations based on Eurostat LFS (lfsq_epgaed, 2012)

appendix H unemployment

Table H.1 Harmonized unemployment rates (percentages)

	1990	1995	2000	2005	2007	2008	2009	2010	2011	2012Q2
Austria		3.9	3.6	5.2	4.4	3.8	4.8	4.4	4.2	4.3
Belgium	6.6	9.7	6.9	8.5	7.5	7.0	7.9	8.3	7.2	7.4
Germany		8.3	8.0	11.3	8.7	7.5	7.8	7.1	5.9	5.5
Denmark	7.2	6.7	4.3	4.8	3.8	3.4	6.0	7.5	7.6	8.0
Spain	14.4	20.0	11.7	9.2	8.3	11.3	18.0	20.1	21.7	24.7
Finland	3.2	15.4	9.8	8.4	6.9	6.4	8.2	8.4	7.8	7.6
France	8.0	10.5	9.0	9.3	8.4	7.8	9.5	9.7	9.6	10.3
Greece			11.2	9.9	8.3	7.7	9.5	12.6	17.7	23.9
Ireland	13.4	12.3	4.2	4.4	4.6	6.3	11.9	13.7	14.4	14.7
Italy	8.9	11.2	10.0	7.7	6.1	6.7	7.8	8.4	8.4	10.6
Luxembourg	1.7	2.9	2.2	4.6	4.2	4.9	5.1	4.6	4.8	5.1
Netherlands	5.1	7.1	3.1	5.3	3.6	3.1	3.7	4.5	4.4	5.1
Portugal	4.8	7.2	4.5	8.6	8.9	8.5	10.6	12.0	12.9	15.5
Sweden	1.7	8.8	5.6	7.7	6.1	6.2	8.3	8.4	7.5	7.6
UK	6.9	8.5	5.4	4.8	5.3	5.6	7.6	7.8	8.0	7.9
Cyprus			4.8	5.5	4.1	3.8	5.5	6.4	7.9	11.3
Czech Rep.			8.7	7.9	5.3	4.4	6.7	7.3	6.7	6.8
Estonia			13.7	7.9	4.7	5.5	13.8	16.9	12.5	10.1
Hungary			6.3	7.2	7.4	7.8	10.0	11.2	10.9	10.9
Lithuania			16.4	8.3	4.3	5.8	13.7	17.8	15.4	13.3
Latvia			13.7	9.6	6.5	8.0	18.2	19.8	16.2	15.9
Malta			6.7	7.3	6.5	6.0	6.9	6.9	6.5	6.4
Poland		13.3	16.1	17.8	9.6	7.1	8.2	9.6	9.7	10.0
Slovenia			6.7	6.5	4.9	4.4	5.9	7.3	8.2	8.4
Slovakia			18.9	16.4	11.2	9.6	12.1	14.5	13.6	13.9
Bulgaria			16.4	10.1	6.9	5.6	6.8	10.3	11.3	12.3
Romania			6.8	7.2	6.4	5.8	6.9	7.3	7.4	7.2
Norway	5.2	4.9	3.2	4.5	2.5	2.5	3.2	3.6	3.3	3.0
Canada	8.2	9.6	6.8	6.8	6.0	6.1	8.3	8.0	7.4	
Japan	2.1	3.1	4.7	4.4	3.9	4.0	5.1	5.1	4.6	4.4
Turkey	8.0	7.6		9.2	8.8	9.7	12.5	10.7	8.8	7.9
United States	5.5	5.6	4.0	5.1	4.6	5.8	9.3	9.6	8.9	8.2
Australia	6.7	8.2	6.3	5.0	4.4	4.2	5.6	5.2	5.1	
Mexico										
EU27	9.1	11.3	8.8	9.0	7.2	7.1	9.0	9.7	9.7	10.6

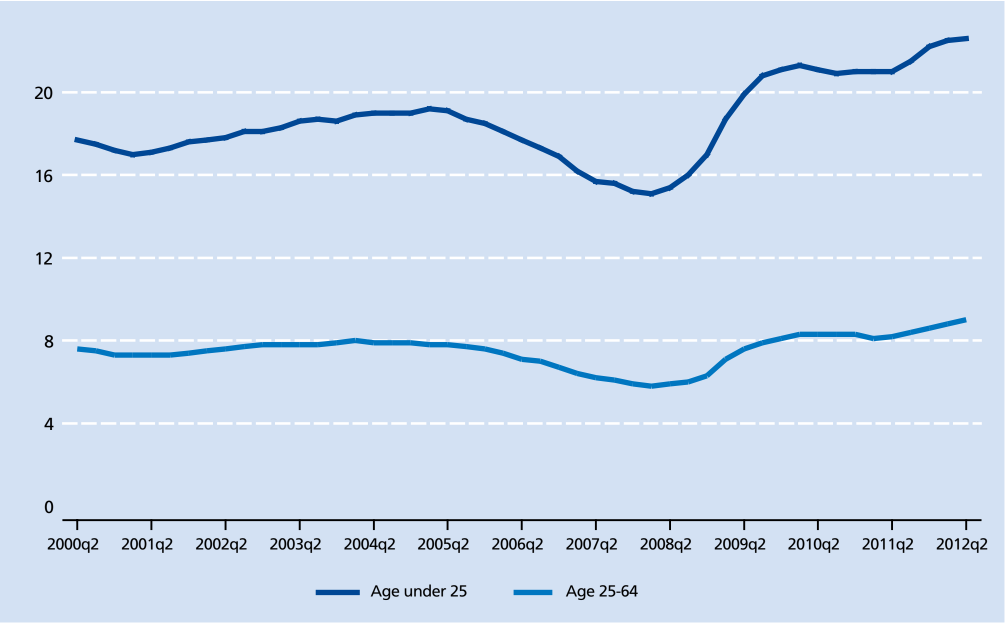
Source: Eurostat LFS (une_rt_a, 2012; une_rt_q, 2012); OECD LFS (2012a)

Table H.2 Long-term unemployment rates (>12 months as percentage of unemployed)

	1995	2000	2005	2006	2007	2008	2009	2010	2011
Austria	26.8	27.7	25.3	27.4	26.8	24.3	21.3	25.2	25.9
Belgium	60.1	54.2	51.7	51.2	50.4	47.6	44.2	48.8	48.3
Germany	48.2	51.2	53	56.4	56.6	52.5	45.5	47.3	48
Denmark	29.3	21.7	23.4	20.8	16.1	13.5	9.5	20.2	24.4
Spain	55.9	41.7	24.5	21.7	20.4	17.9	23.7	36.6	41.6
Finland		28.2	25.8	25.2	22.9	18.4	16.8	24	22.2
France	39.4	38.8	41	41.9	40.2	37.5	35.2	40.2	41.5
Greece	50.7	54.7	52.2	54.3	50	47.5	40.8	45	49.6
Ireland	61.9	37.3	33.4	31.6	29.5	27.1	29.2	49.3	59.4
Italy	63.4	61.8	49.9	49.6	47.4	45.7	44.4	48.5	51.9
Luxembourg	24.6	24	26.4	29.5	28.7	32.4	23.1	29.3	28.8
Netherlands	47.4	26.5	40.2	43	39.4	34.8	24.8	27.6	33.5
Portugal	43.3	42.3	48.2	50.2	47.1	47.4	44.2	52.3	48.2
Sweden	25.9	25	13.1	14.7	13.8	12.6	13.3	17.7	18.6
UK	41.9	26.7	21.1	22.3	23.8	24.1	24.5	32.7	33.5
Cyprus		25.2	23.5	19.3	18.6	13.6	10.4	20.4	20.9
Czech Republic		48.6	53	54.2	52.2	49.2	30	40.9	40.5
Estonia		45.8	53.4	48.2	49.5	30.9	27.4	45.4	56.8
Hungary		48	45	45.1	46.8	46.5	41.6	49.3	47.9
Lithuania		48.7	52.5	44.3	32	21	23.2	41.4	51.9
Latvia		57.8	46	36.5	26.4	25.7	26.7	45	54.6
Malta		65.8	46.4	40.6	41.9	42.3	43.4	46.4	46.1
Poland		46.1	57.7	56.1	51.3	33.5	30.3	31.1	37.2
Slovenia		61.4	47.3	49.3	45.7	42.2	30.1	43.3	44.2
Slovakia		54.7	71.9	76.3	74.2	69.6	54	64	67.8
Bulgaria		57	59.8	55.7	58.8	51.7	43.3	46.4	56.2
Romania		51.5	56.3	57.8	50	41.3	31.6	34.9	41.9
EU27		46.1	45.8	45.3	42.7	36.9	33.2	39.9	42.9
Switzerland		26.9	36.4	37.2	39.3	32.5	28.3	31.3	36
Norway		10.2	18.7	23.2	18.5	13.2	16.5	20.6	23.8
Canada	16.8	11.3	9.6	8.7	7.4	7.1	7.8	12.0	13.5
Japan	18.1	25.5	33.3	33	32	33.3	28.5	37.6	39.4
Turkey				30.4	26.3	23.8	22.7	26.1	23.7
United States	9.7	6	11.8	10	10	10.6	16.3	29	31.3
Mexico	1.5	1.2	2.3	2.5	2.7	1.7	1.9	2.4	2.0
Australia	32.0	28.3	18.3	18.1	15.4	14.9	14.7	18.5	18.9

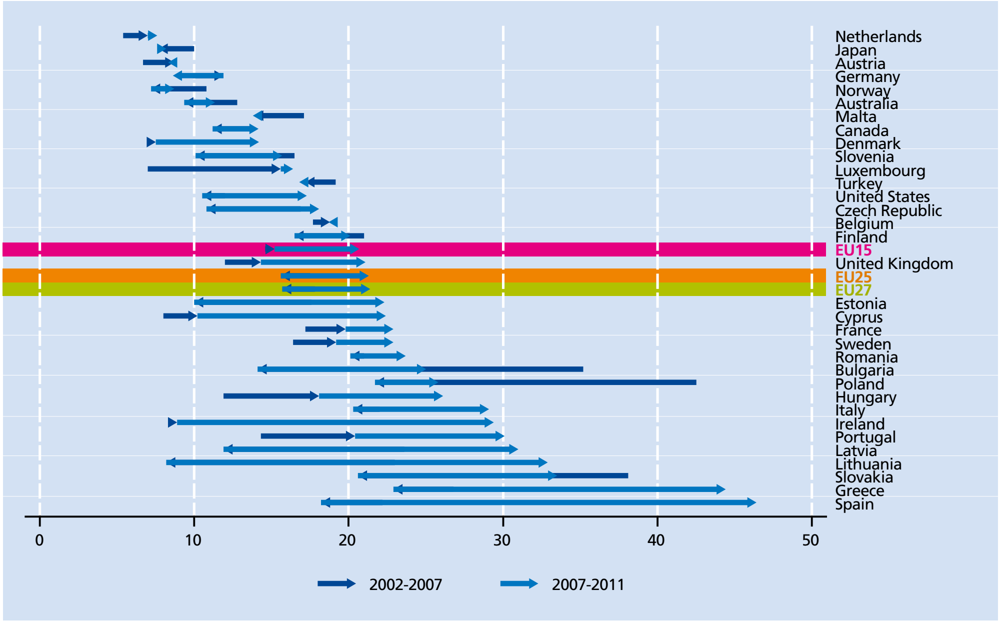
Source: Eurostat LFS (une_ltu_q, 2012; une_ltu_q, 2012); OECD LFS (2012a)

Figure H.1 Unemployment trend EU27, by age group (percentages)



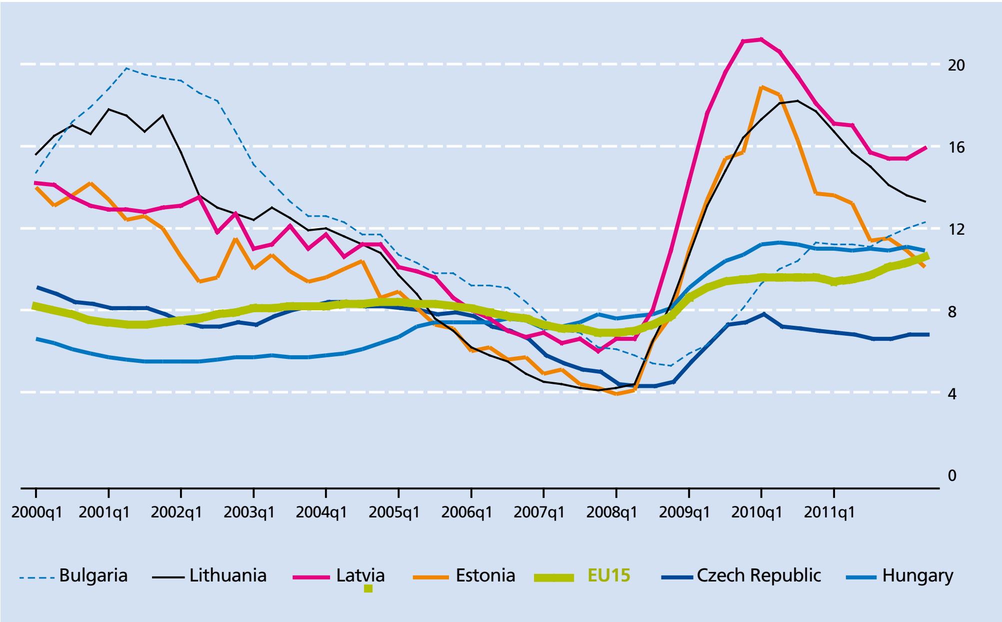
Source: Eurostat LFS (une_rt_q, 2012)

Figure H.2 Development of the youth unemployment rate (age 15-24, percentages)



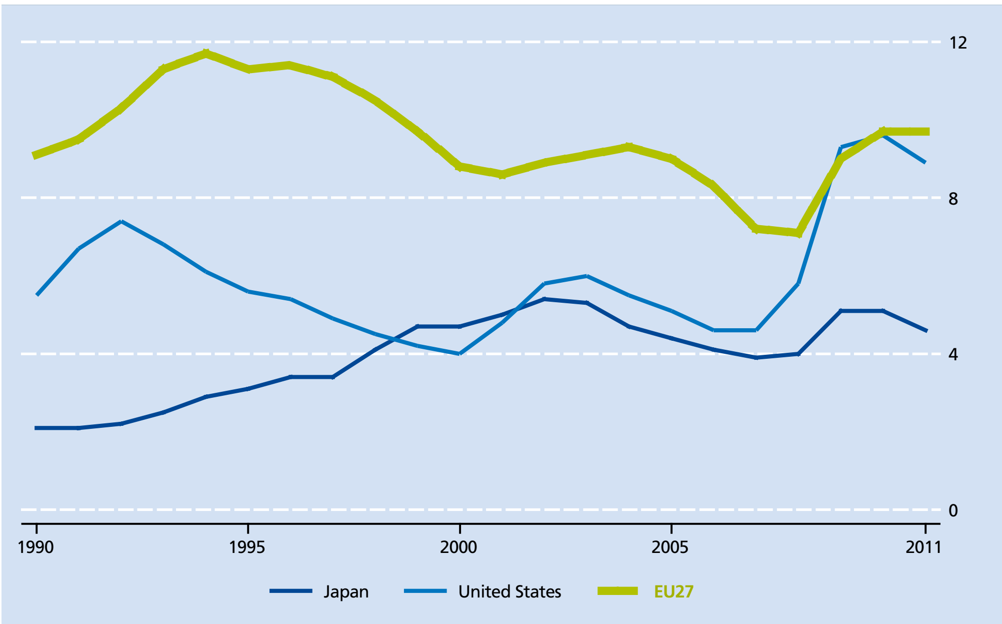
Source: Eurostat LFS (une_rt_a, 2012); OECD LFS (2012a)

Figure H.3 Unemployment in Eastern European countries (percentages)



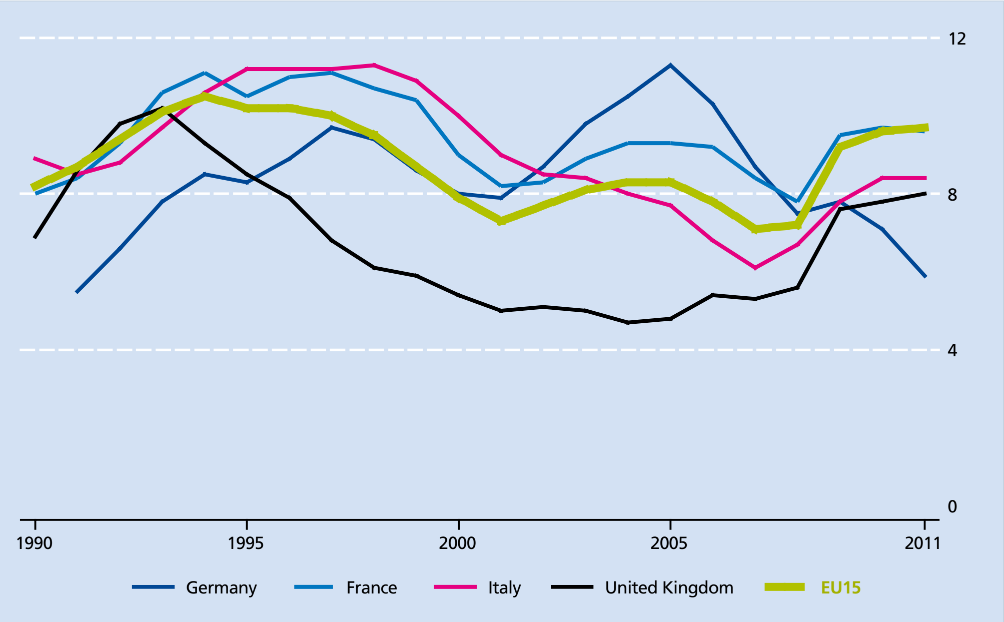
Source: Eurostat LFS (une_rt_q, 2012)

Figure H.4 US unemployment on same level as EU27 after crisis (percentages)



Source: Eurostat LFS (OECD LFS, 2012a)

Figure H.5 Unemployment in larger EU-countries: German recovery unhindered by the crisis (percentages)



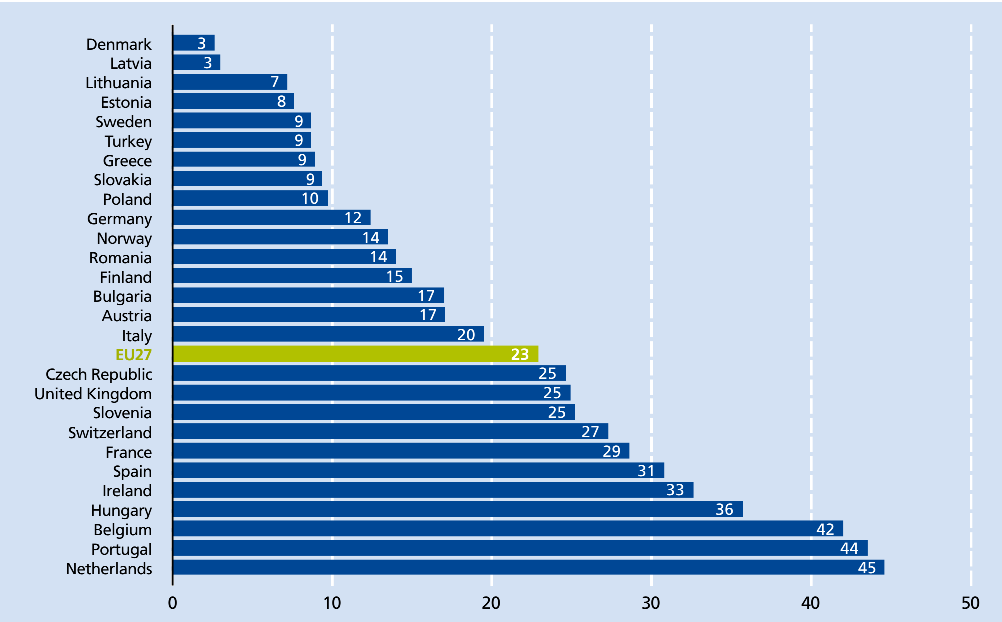
Source: Eurostat LFS (une_rt_a, 2012)

Table H.3 Methods used for seeking work, (EU27, 2012)

Contact public employment office	53
Contact private employment office	23
Apply to employers directly	63
Ask friends, relatives, trade unions	71
Publish or answer advertisements	44
Study advertisements	72
Took test, interview, examination	17
Look for land, premises, equipment	1
Look for permits, licenses, financial resources	1
Other method	11

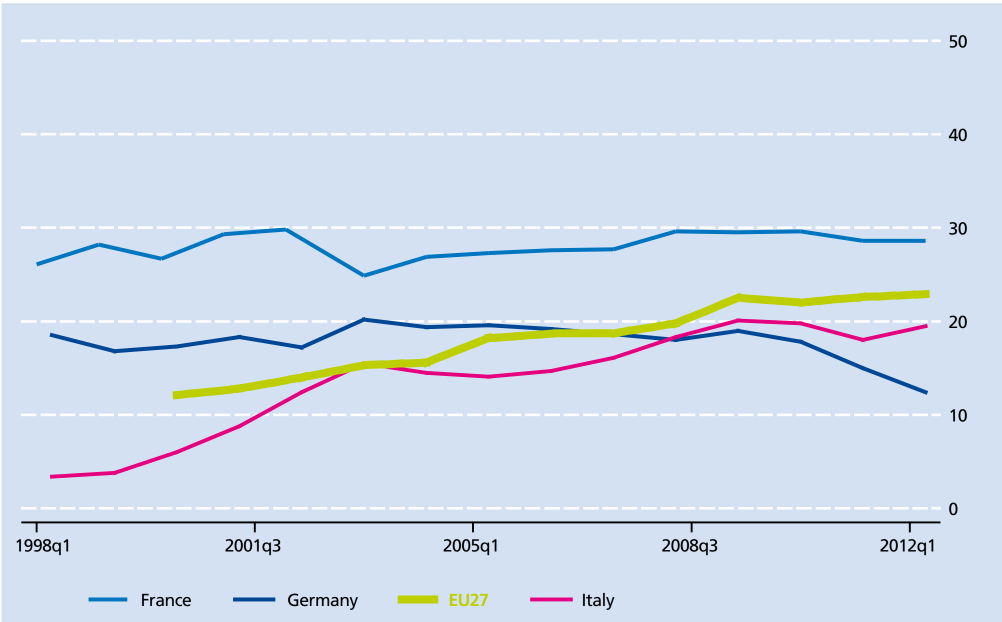
Source: Eurostat LFS (lfsq_ugmsw, 2012)

Figure H.6 Unemployed searching through private employment agencies, 2012 (percentages)



Source: Eurostat LFS (lfsq_ugmsw, 2012)

Figure H.7 Use of private employment agencies by unemployed, 1998-2012 (percentages)



Source: Eurostat LFS (lfsq_ugmsw, 2012)

appendix I economic variables

Table I.1 Gross domestic product levels (per capita, 2011) and growth rates (2008-2012)

	GDP per capita (PPS, x 1000)	Real GDP growth* (%)				
	2011	2008	2009	2010	2011	2012 (f)
Luxembourg	68.4	-0.7	-4.1	2.9	1.7	1.1
Norway	47.5	0.0	-1.7	0.7	1.4	1.7
United States	37.1	-0.3	-3.1	2.4	1.8	2.0
Switzerland	39.3	2.2	-1.9	3.0	1.9	0.9
Netherlands	32.9	1.8	-3.7	1.6	1.0	-0.9
Australia*						
Ireland	32.4	-2.1	-5.5	-0.8	1.4	0.5
Canada*						
Denmark	31.4	-0.8	-5.8	1.3	0.8	1.1
Sweden	31.8	-0.6	-5.0	6.6	3.9	0.3
Belgium	29.8	1.0	-2.8	2.4	1.8	0.0
Germany	30.0	1.1	-5.1	4.2	3.0	0.7
Finland	28.9	0.3	-8.5	3.3	2.7	0.8
United Kingdom	27.4	-1.0	-4.0	1.8	0.9	0.5
France	27.0	-0.1	-3.1	1.7	1.7	0.5
Japan		-1.0	-5.5	4.5	-0.8	1.9
Spain	24.7	0.9	-3.7	-0.3	0.4	-1.8
EU 27	23.4	0.3	-4.3	2.1	1.5	0.0
Italy	25.3	-1.2	-5.5	1.8	0.4	-1.4
Cyprus	23.6	3.6	-1.9	1.3	0.5	-0.8
Greece	20.1	-0.2	-3.1	-4.9	-7.1	-4.7
Slovenia	21.3	3.4	-7.8	1.2	0.6	-1.4
Malta	21.3	4.0	-2.4	3.4	1.9	1.2
Portugal	19.4	0.0	-2.9	1.4	-1.7	-3.3
Czech Republic	20.2	3.1	-4.5	2.5	1.9	0.0
Slovakia	18.4	5.8	-4.9	4.4	3.2	1.8
Hungary	16.4	0.9	-6.8	1.3	1.6	-0.3
Estonia	16.8	-4.2	-14.1	3.3	8.3	1.6
Poland		5.1	1.6	3.9	4.3	2.7
Lithuania	16.6	2.9	-14.8	1.5	5.9	2.4
Latvia	14.8	-3.3	-17.7	-0.9	5.5	2.2
Turkey	13.4	0.7	-4.8	9.0	8.5	3.3
Romania		7.3	-6.6	-1.6	2.5	1.4
Bulgaria		6.2	-5.5	0.4	1.7	0.5

* The calculation of the annual growth rate of GDP volume is intended to allow comparisons of the dynamics of economic development both over time and between economies of different sizes. For measuring the growth rate of GDP in terms of volumes, the GDP at current prices are valued in the prices of the previous year and the thus computed volume changes are imposed on the level of a reference year; this is called a chain-linked series. Accordingly, price movements will not inflate the growth rate.

Source: Eurostat, (tec00115)

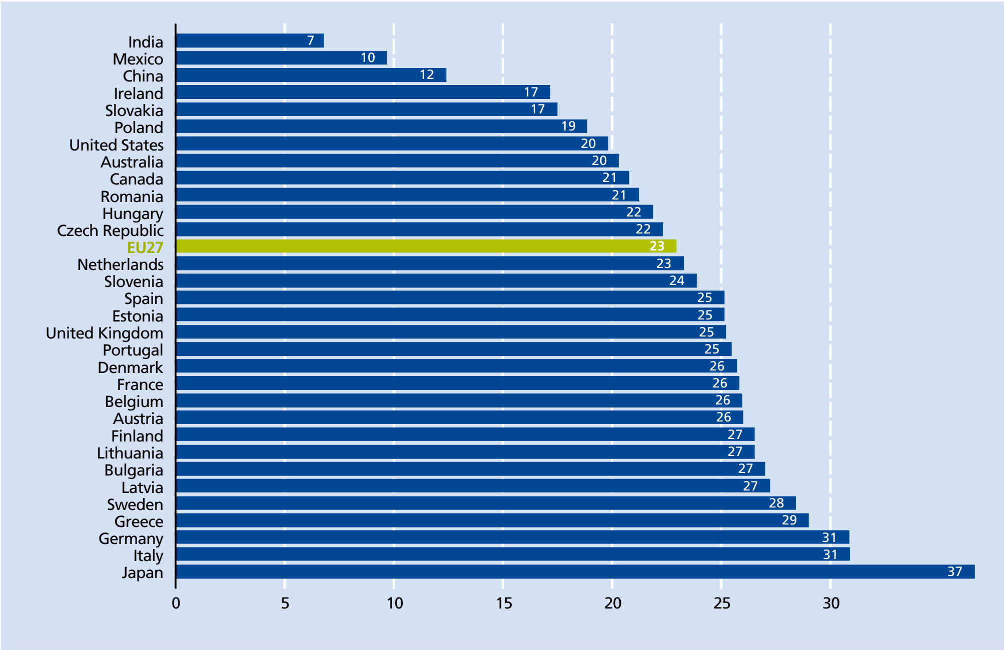
Table I.2 Total population in EU & OECD countries, 2012 (x1000)

	total population	% 15-64	=	'potential labor force'	% female
Austria	8,323	68	=	5,664	50
Belgium	11,055	65	=	7,240	50
Germany	80,910	67	=	53,846	50
Denmark	5,583	65	=	3,609	50
Spain	45,922	67	=	30,958	50
Finland	5,388	65	=	3,507	50
France	62,009	65	=	40,005	51
Greece	10,958	66	=	7,223	50
Ireland	4,490	66	=	2,944	50
Italy	60,505	65	=	39,612	50
Luxembourg	511	69	=	354	49
Netherlands	16,487	67	=	10,986	50
Portugal	10,601	66	=	7,042	50
Sweden	9,453	65	=	6,108	49
United Kingdom	61,841	66	=	40,637	50
Cyprus	838	70	=	585	52
Czech Republic	10,512	69	=	7,238	49
Estonia	1,334	67	=	896	52
Hungary	9,803	69	=	6,717	51
Lithuania	3,191	68	=	2,177	52
Latvia	2,032	67	=	1,366	52
Malta	421	69	=	289	49
Poland	37,536	71	=	26,583	50
Slovenia	2,056	69	=	1,415	48
Slovakia	5,404	72	=	3,881	50
Bulgaria	7,279	68	=	4,929	50
Romania	21,356	70	=	14,939	50
EU27	495,796	67	=	330,748	50
EU15	394,036	66	=	259,734	50
Australia	22,621	67	=	15,256	50
Canada	34,483	69	=	23,864	50
Japan	127,799	64	=	81,342	50
Switzerland	7,955	67	=	5,363	50
Norway	4,986	66	=	3,303	49
Turkey	73,481	67	=	49,325	50
United States	311,592	67	=	208,997	50
Mexico[1]	112,336	64	=	71,484	52
China[2]	1,343,240	74	=	983,280	49
India[2]	1,205,074	65	=	771,475	48

1. Data for 2010.
2. CIA Factbook (2012).

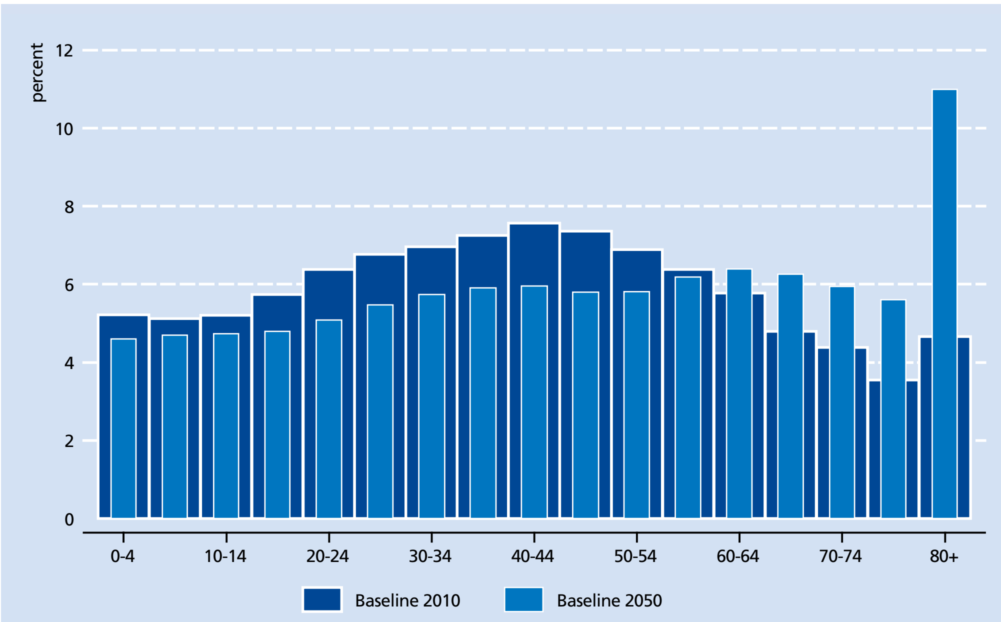
Source: Eurostat (lfsi_act_a, 2012), OECD (ALFS, 2012a)

Figure I.1 Grey rate per country in 2010 (population age 65+ as percentage of population age 15-64)



Source: Eurostat (2012), OECD (ALFS, 2012a), CIA Factbook (2012). Data Mexico 2010

Figure I.2 Age distribution of the EU-27 population, 2010 vs. projection 2050



Source: SEO calculations based on Eurostat (EUROPOP 2008)

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