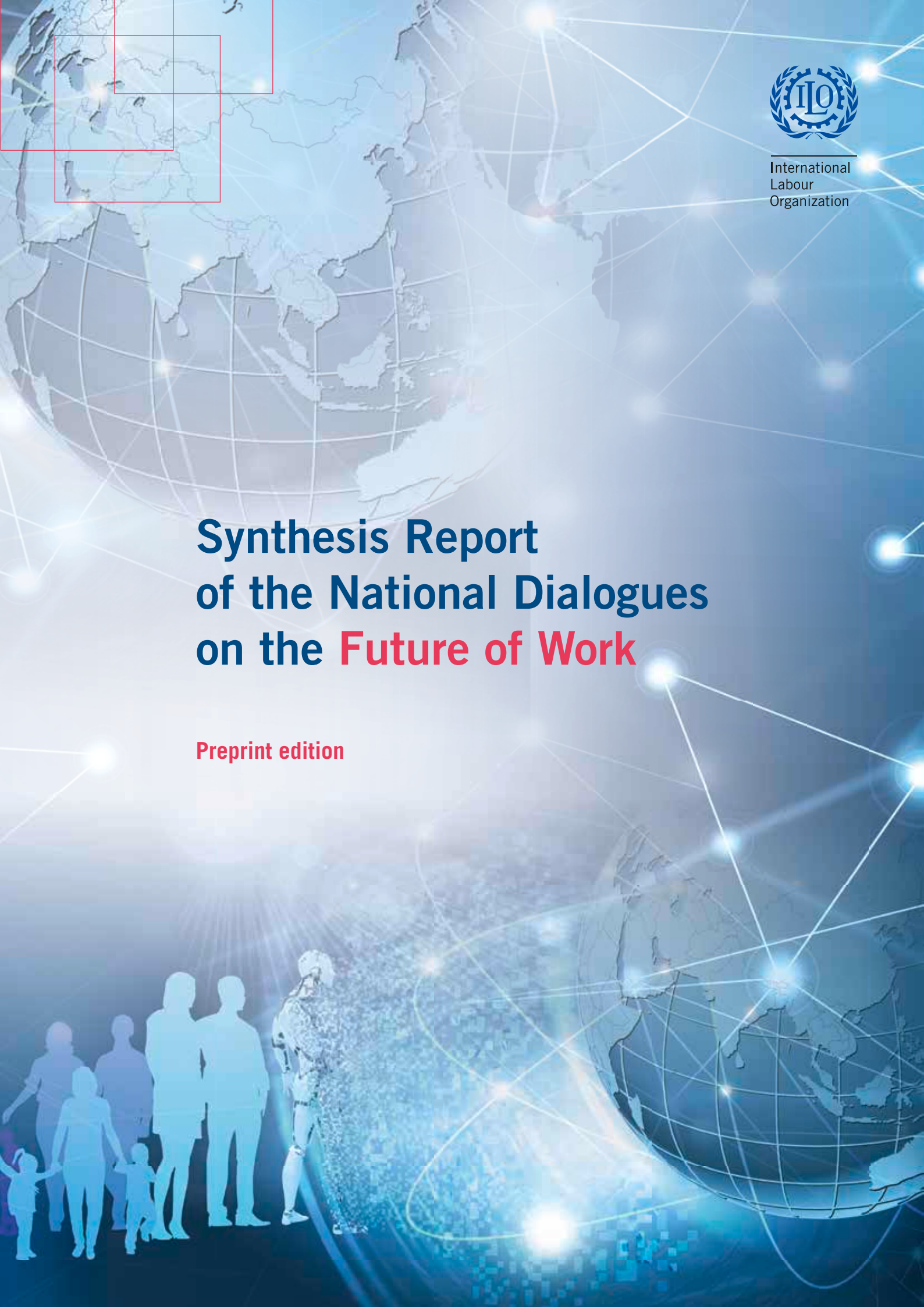

International Labour Organization

Synthesis Report of the National Dialogues on the Future of Work

Preprint edition

Synthesis Report of the National Dialogues on the Future of Work

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Countries that contributed to the ILO's Future of Work Initiative by level of development (by ODA list)

Least Developed countries	Other low Income countries (per capita GNI <=$1 045 in 2013)	Lower Middle Income Countries and Territories (per capita GNI $1 046–$4 125 in 2013)	Upper Middle Income Countries and Territories (per capita GNI $4 126–$12 745 in 2013)	Upper Income Countries
Bangladesh	Kenya	Armenia	Algeria	Australia
Comoros	Zimbabwe	Cabo Verde	Antigua and Barbuda**	Austria
Guinea		Cameroon	Argentina	Bahamas**
Kiribati*****		Egypt*	Azerbaijan	Barbados**
Lesotho		El Salvador***	Belize**	Belgium
Liberia		Ghana	Brazil	Canada
Madagascar		Guatemala***	Cook Islands*****	Czech Republic
Mauritania		Guyana**	China (People's Republic of)	Denmark****
Nepal		Honduras***	Costa Rica***	Finland****
Rwanda		India	Dominica**	France
Sao Tome and Principe		Indonesia	Dominican Republic***	Germany
Senegal		Morocco	Fiji*****	Hungary
Sierra Leone		Nicaragua***	Grenada**	Iceland****
Solomon Islands*****		Nigeria	Iraq*	Israel
Sudan		Pakistan	Jamaica**	Italy
Tanzania		Papua New Guinea*****	Jordan*	Japan
Timor-Leste		Paraguay	Lebanon*	Korea, Republic of
Tuvalu****		Samoa*****	Marshall Islands*****	Lithuania
Uganda		Sri Lanka	Mauritius	Macedonia
Vanuatu*****		Swaziland	Mexico	Malta
Yemen*		Syrian Arab Republic	Montenegro	Netherlands
		Uzbekistan	Namibia	Norway****
		Viet Nam	Palau*****	Oman*
			Panama***	Poland
			Peru	Portugal
			Saint Lucia**	Russian Federation
			Saint Vincent and the Grenadines**	Saint Kitts and Nevis**
			Seychelles	Saudi Arabia
			South Africa	Spain
			Thailand	Sweden****
			Tonga*****	Switzerland
			Tunisia	Trinidad and Tobago**
			Turkey	USA
			Uruguay	

Supra-national dialogues:

*	The dialogue in the Arab countries included Iraq, Jordan, Lebanon, Oman, and Yemen. Plus Egypt. These countries met tripartite conditions. However other countries including Bahrain, Kuwait, Qatar, Saudi Arabia, Syrian Arab Republic and United Arab Emirates also sent non-tripartite delegations.
**	The dialogue of CARICOM countries included Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, and Trinidad and Tobago.
***	The dialogues in Central American included Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Nicaragua and Panama. • 1st Central American; Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras and Panama. • 2nd Central American; Costa Rica, Dominican Republic, Nicaragua and Panama.
****	The dialogue in Nordic countries that include Denmark, Finland, Iceland, Norway and Sweden (including also the Associated Territories of Greenland, the Faroe Islands and the Aland Islands) have a plan to implement national dialogues with the participation of tripartite delegations from all the Nordic countries as follows: in 2016 in Finland (integrated in this report), in2017 in Norway (integrated in this report), in 2018 in Sweden and in 2019 in Iceland.
*****	Pacific Island Countries (PICs): Cook Islands, Fiji, Kiribati, Marshall Islands, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu.

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Introduction

In the framework of the ILO's Centenary commemoration, seven initiatives[1] were launched in 2013 with the aim of reflecting on the main challenges that the ILO will face in fulfilling effectively its mandate of social justice in the years to come. Through the centenary initiative on the Future of Work the Office proposes to address the implications of the transformational change that is impacting the world of work.

The first stage of this initiative took place at the national level over 2016 and 2017, in response to the ILO Director-General's invitation to all member States to organize broad national dialogues on the future of work with the participation of governments, workers' and employers' organizations. In addition, in some cases, academia, NGOs and other members of society including youth also participated. A total of 168 member States responded positively to the ILO's invitation and so far 113 countries have participated in a national or supra-national tripartite dialogue. These dialogues were to a large extent structured around four conversations: work and society, decent jobs for all, the organization of work and production and the governance of work, following the logic proposed in the Director-General's Report to the Conference in 2015.[2]

The **objective of this report** is to provide the members of the Global Commission on the Future of Work an organized synthesis of the reports of the national dialogues. With the aim of providing a coherent synthesis of the myriad topics raised in the national dialogues, the present report follows the structure of the four conversations. This report, together with the ILO's Inception Report on the Future of Work that addresses the thematic issues from a more academic perspective, constitute the main documents that will inform the initial meeting of the Global Commission.

Countries that decided to take part in the initiative determined for themselves the format that their national dialogue would take and the subject/s that would be addressed. As a consequence of this heterogeneity, the depth, focus and scope of the national dialogues varied enormously. It should also be noted that some countries held one national dialogue which addressed the four centenary conversations, while other dialogues focussed on one or more conversations, or concentrated on a specific topic. Others, including Brazil, Indonesia and the Nordic countries,[3] decided to hold several national dialogues. Some countries submitted a consolidated report of the dialogue(s), while others provided a report for each conversation. Some reports were accompanied by surveys and studies. While the majority of countries held dialogues at the national level, some decided to hold them at the sub-regional level, including: the CARICOM countries, the Central American countries, the Nordic countries and the Pacific Island countries. Regional reports of dialogues sometimes overlapped with the national reports provided by individual countries, for example, Barbados and Trinidad and Tobago and CARICOM.

Some countries, such as the Central African Republic and the United States, started the discussion on the future of work before the formal invitation by the ILO Director-General. The Central African Republic has held a series of discussions since November 2015 focusing on the challenges of the future of decent work. The United States dedicated a symposium in December 2015 to discussing the future of work, followed in March 2016 by a letter of intent of the US Department of Labour.[4]

The great majority of dialogues addressed the future of work in general terms. But some countries held national dialogues in the framework of a broader policy reflection,[5] including Austria, Bangladesh, Denmark,[6] Germany, Ghana, Senegal, Uganda and Switzerland,[7] while other dialogues focussed on a specific point in time in the future: Cameroon (2035), Israel (five to ten years), Japan[8] (2035), Jordan (2021) and Madagascar (100 years).

The present text is the result of a thorough examination of the national dialogue reports, from which the main issues have been selected. The report is based exclusively on the national dialogues, the contents of which are summarized without further elaboration or comment. Although the greatest objectivity has been applied, the process has unavoidably involved a degree of selectivity and analysis. It should also be borne in mind that, in the interests of brevity, the enumerations of countries provided as examples are not exhaustive.[9]

Drivers of change

The national dialogues in all countries referred in one way or another to the various drivers of change (or megatrends).[10] While the German White Paper *Work 4.0: Reimagining work*[11] devotes a chapter to "drivers and trends", other national dialogue reports address them throughout the conversations. The main drivers discussed were demographics, technological change, and climate change and environment. Some countries also referred to other drivers, such as globalization and changes in ideology. For example, in Comoros it was noted that the future of work is in danger for a number of reasons, including environmental change, technological advances, migration flows and a booming demographic.

Demographics

Demographics are changing in all regions. This has always been the case. But today there are other factors at play, such as increased **migration flows**, as indicated in Australia and the Arab States, and the **ageing** of the population due to lower mortality rates as highlighted in Japan, Australia and the Czech Republic, although health is also deteriorating. In addition, the high numbers of **young people** seeking to enter the labour market and the desire to increase women's labour market participation is creating many challenges. If not met, these challenges will have negative impacts, such as an increase in persons not in employment, education or training (NEETs) and low levels of labour market participation (particularly by women and youth).[12]

Demographic differences within countries were also highlighted. In Liberia, it was noted that, without fresh ideas to address rapid **urbanization**, the number of people in the world living in slums lacking access to basic infrastructure and services, such as sanitation, electricity and health care, may skyrocket from one billion at present to three billion by 2050. Similarly, in Swaziland, it was noted that rural-urban migration has resulted in an increase in informal settlements and that there is little by way of a plan for the inclusion of these slum-inhabitants in the labour market. In Rwanda, the differences were highlighted in the nature and decency of jobs throughout the country, with most decent, professional, formal and sustainable employment being created and increasing in urban, rather than rural areas. The discussion in Brazil also focussed on regional differences. In Uganda, it was stated that it is necessary to contend with the "schizophrenic nature" of work, where there are two distinct groups of people living in parallel universes. The first are rural workers, whose tools continue to be the hand hoe, working on a very small plots, with very little by way of innovation in what has been identified as the "old economy". The second is urban based, that is in Kampala, where work is very highly skilled, technologically aware and connected to the rest of the world.

A picture of the future was illustrated by the dialogue in Japan, which predicts that IT will remove restrictions on where people work and equalize the world of work in both urban and rural areas. IT could therefore help retain more young people in local communities,

and it will become increasingly possible for regional hub cities, small towns and villages to connect directly with overseas countries. Rural areas will be able to promote themselves directly overseas, and the time will come for **"glocalism"**, in which local communities are connected globally.

Due to its economic and social impact, **migration** was addressed by both countries of origin and of destination in all regions. Reference was made in Nigeria to the conditions of migration and the measures adopted by countries to prevent serious human rights violations. Some countries, such as Nepal, where a high percentage of the population emigrates, referred to the need for policies at the national level to ensure that the rights of migrant workers are adequately protected in countries of destination. The importance of remittances, and the negative impact of the brain drain, were highlighted in some countries, including Yemen, while specific reference was made in Sierra Leone to the impact on local societies of the high numbers of men who migrate. Reference was made in Uzbekistan to the issue of returning labour migrants. While in South Africa, it was noted that internal and regional migration has become an important livelihood strategy, but has created (gendered and national) hierarchies, with the growing notion of insiders and outsiders. The prevailing trend points to migration flows increasing in the future, resulting in urbanization and housing deficits in cities, which will force people to move into informal and overcrowded settlements. In the dialogue in the Arab States, it was noted that the influx of refugees and waves of displacement in the region have led to the emergence of new injustices. Millions of Syrian nationals have sought refuge in neighbouring countries, and particularly Lebanon and Jordan. So far, there has not been a comprehensive policy in these countries to adequately address the challenges faced by migrants, including: vulnerability and restrictions relating to access to work, work in the informal economy, the spread of child labour, high levels of poverty and low purchasing power, limited access to social protection systems, and high levels of unemployment. Internally Displaced Persons (IDPs) also suffer from high levels of unemployment, vulnerability in the workplace and a lack of social protection.

Migrant workers are more vulnerable to serious rights deficits, as highlighted by the Central American countries. These include the absence or insufficient coverage by labour legislation, discrimination and obstacles to unionization. In this regard, the need was highlighted in Comoros for countries to adopt fair migration policies. The dialogues in some European countries, such as the Czech Republic and Poland, emphasized the importance of taking measures at the EU level for social and economic convergence.

From a different perspective, the issue of migration was addressed in Japan and Thailand in the framework of an ageing society. Migrant workers are seen as necessary for the development of the national economy, particularly in the care sector. In other countries, including Saudi Arabia and Seychelles, proposals were made for the replacement of migrant workers by national workers.

It was noted in the Netherlands that, in addition to physical labour migration, new forms of **"digital labour migration"** are being created through the outsourcing of tasks and work across national borders. Much new and future work will be performed online and can be carried out anywhere in the world. One example is a platform known as Topcoder, through which IT specialists from the world over offer their services. Depending on whether there is capacity or scarcity on the global labour market, this can have a major impact on the price at which

these services are offered. A serious challenge is to decide how to deal with all forms of labour migration and prevent unfair competition and social dumping.

Technology

The great majority of national dialogues addressed the speed **of technological change**, observing that the future of work goes hand-in-hand with changes in technology. While, in developing countries, such as Brazil and United Republic of Tanzania, the issue concerns access to technology, developed countries are already examining how to adapt to technological developments in all economic sectors. Perceptions of and attitudes towards technology therefore differ between countries.

While many countries examined new technologies from the viewpoint of their potential, others expressed concern at their impact on labour markets and the serious risk of exclusion. It was considered in many national dialogues that the effects of technology are unpredictable. But countries are already reflecting on the measures needed to address the serious skills mismatches resulting from technology. Concern was expressed in some countries, such as Brazil and Viet Nam, at their ability to keep pace with technological innovation. They also questioned technological determinism, which results in many countries having little access to technology. It was also highlighted in some countries, such as Algeria, that technologies and their development should be adapted to national circumstances and local needs. Other countries, including Australia, Austria, Germany, Switzerland and Thailand referred in their reports to the approach and the specific policies and measures already envisaged or adopted to address the impact of technology in the labour market and the economy in general.

One of the elements that has contributed to technological development is the gigantic and rapidly growing volume of unstructured mass data produced by decentralized sources that can be stored, analysed and disseminated, known as **"big data".** Several dialogues referred to the importance of big data for research and innovation. In others, such as Australia, Austria, Belgium and Germany and the United States of America big data is viewed as an instrument for predicting human behaviour, preferences and performance, and as a driver of job creation. As indicated in Germany, among others, it promotes the optimization of workflows, business efficiency and the monitoring of quality, success and occupational safety and health (OSH). Completely original insights can be gained by interconnecting large data sets. However, big data may be incompatible with privacy rights. There is a need to strike a balance between the legitimate interests of companies in the protection of their property, the monitoring of employee performance and rules of compliance and workers' privacy. For this reason, emphasis was placed in several countries, including Austria, Germany, Lithuania and Switzerland, on the importance of taking adequate measures to ensure privacy and data protection so that the opportunities offered by big data can be taken up effectively and safely.

Climate change and environment

Reference was made in most countries, including Comoros, Germany, Liberia, PICs, Portugal and Switzerland, to the effect of climate change and the environment on the world of work. Climate change was identified in PICs as one of the two critical areas for the future of work in the region (the other one being youth employment). For small island economies, the physical

impact of climate change, such as rising sea levels and natural disasters, is significant and particularly devastating. Migration is considered a survival strategy. It was further stated in the national dialogues of PICs that climate change impacts negatively on agriculture, tourism and fisheries, and that the cost of climate change to GDP including the associated social risks of migration and displacement is increasing in the Pacific Islands. Mitigation measures are required to address these negative trends. In Brazil, the discussion focussed on climate change and the threat to the environment in the Amazon. In Nigeria, it was observed that environmental challenges, such as oil spillages, affect jobs and livelihoods, which is why it is necessary to ensure a greener economy and avoid deforestation. Environmental changes are severely affecting the agricultural sector in Nigeria, resulting in declining outputs, the loss of jobs and livelihoods for farm workers and rising rural poverty. The dialogue in Jordan referred to the impact of water scarcity on rural development. It was also noted that the process of environmental degradation is influencing the sustainability of growth and development in Panama.

In Uganda, it was noted that the effects of climate change are enormous and that agriculture is no longer profitable. The seasons are changing and making income unpredictable, which is exacerbating rural/urban migration (particularly among the young). Consideration should be given to public-private partnerships to improve agricultural livelihoods. It was considered in Sri Lanka that little attention is paid to environmental factors and employment, even though the majority of workers are still engaged in agriculture-related work. The environmental impact of certain production systems will affect the labour market and require affordable strategies for stakeholders.

Many national dialogues addressed the environment as a potential sector for job creation and land exploitation. In Austria, it was noted that IT contributes to increased efficiency, resource conservation and environmental relief, and therefore to the sustainable development of the country.

Conversation 1: Work and Society

1.1. To work or not to work? That is one of the questions…

Although most national dialogues took it as given that the only way forward is through the creation of decent jobs for all, this view was challenged in some countries, where alternatives were flagged (such as basic income) as a means of ensuring the well-being of the population.

Emphasis was placed in Cameron on the fact that under the national Constitution work is a constitutional right and duty for every citizen, and that the State shall endeavour to provide work for everyone. However, it is recognized that current realities in these countries make this difficult. It was highlighted in the national dialogue in Tunisia that decent work is the best way of achieving people's aspirations in their quest for security, stability, social justice and skills development. The issue was raised in South Africa and other countries of the need to re-define employment and promote social justice, even in the face of the changing nature of work.

The national dialogue in Japan, discussing the labour situation in about 20 years' time, emphasized that technological progress will allow people to work, no longer only for money, but that all individuals will find their own way of contributing to society, whether through work or something else. By 2035, it will no longer be necessary to work. By then, work will be a choice and something that people will do for self-fulfilment.

Some dialogues referred to the concept of **basic income**.[13] One important challenge raised in the German dialogue is ensuring that the benefits provided by the welfare state are fit for the future. The German White Paper notes that one particularly influential idea in the international debate is that of an "unconditional basic income", which has been discussed in Germany for years and is gaining new supporters. The dialogue in Trinidad and Tobago added that decent work usually focusses on wage income, but that it is necessary to look at the universal basic income and the national system of redistribution. The issue was raised in the Nordic dialogue of how to finance a basic income. The discussion highlighted the importance of the sound monitoring of the tax system.

Discussion of basic income included some consideration of whether **social protection** should be linked to a job (whether formal, informal, self-employment, etc.), or should be considered a human right. For example, the question was raised as to whether social protection in Jordan should in future go beyond meeting basic needs and aim to improve standards of living, increase reliance on contributory schemes and provide incentives for individuals to generate income through their own means. In Madagascar, the importance was emphasized of improving access to social protection, which does not currently meet social needs. In Ghana, it was argued that social protection for all helps to move people from dependence to dignified work. The issue of social protection for all was also addressed in Portugal.[14]

From a different perspective, it was noted in the Netherlands that demographic changes (and particularly rising life expectancy) make it possible to **continue working for longer** and provide scope for second and third careers. This can provide openings to spread paid employment and working hours over the course of a person's life.

1.2. Development today and in the future

1.2.1. From survival to happiness

It is important to note the many differences in the socio-economic situation of the countries that participated in this exercise, and particularly their level of development.[15] Although the least developed countries (LDCs) are struggling to meet the basic needs of their population today, wealthier countries are concentrating on the challenge ahead. While the national dialogues in more developed countries covered automation and technological disruption, in developing countries they addressed the issue of **survival**. In Africa, they focussed largely on the pressing issue of poverty. In many countries, including Madagascar, Mauritius, Nigeria, Pakistan, Trinidad and Tobago and Zimbabwe, it was argued that, in view of their level of development, survival is the main concern of the majority of the population. It was noted in Sao Tome and Principe that decent work is still a utopia in view, among other factors, of the lack of employment for young people, the high numbers in the informal economy, low wages in both the public and private sectors, inadequately skilled human resources, the lack of material resources, low protection and solidarity for the elderly, inefficient social dialogue and low productivity.

The dialogue in the Syrian Arab Republic recalled the effects of the **current civil armed conflict** on the national economic situation, and particularly the labour market. In the dialogue in the Arab countries,[16] it was highlighted that the rise in conflict and extremism is one of the major factors impacting the future for work in the region.[17] It was emphasized that conflict-affected countries and territories (including Iraq, the Occupied Arab Territories, Syrian Arab Republic and Yemen) are suffering from a deterioration in livelihoods, rising unemployment rates (especially amongst youth), displacement and a damaged generation due to the disruption of education and employment opportunities, in addition to fragile social protection systems. It was also stated in the Arab States that the future of these states remains unpredictable, but that they will require comprehensive post-conflict reconstruction. Emphasis was placed in the dialogues in the Arab countries on the need to alleviate the adverse effects of conflict through the generation of new income opportunities, including through on-demand services and the gig economy. The subject was raised in the Nigerian dialogue of the negative effects on the world of work and production of continuous **social tension and violence**, and particularly in the national context of terrorist groups and socio-environmental conflicts between established farmers and cattle-herders. It was recalled in Pakistan that the important challenge of "security", particularly in the context of the country's contribution to the **"war on terror"**, is badly affecting industry and trade, with a resulting shrinkage of job opportunities over recent years. It was concluded in one of the Central American dialogues that thinking about the future of work involves thinking about the future of humanity, and that exclusion undermines peace and stability.

Poverty, as well as **inequality** and the **fair distribution of income**, were highlighted by many countries, with some dialogues, for example, in the Czech Republic, referring to the Agenda

2030 goal to end global poverty. The Czech dialogue also considered that today's policies will not reduce poverty, but only increase inequality. Seven out of ten people live in countries where the gap between the rich and poor is greater than it was 30 years ago. There is therefore a great need for policies to redistribute wealth from the rich elites to the majority, and to build a fairer political system that values everybody.

In many developing countries, including Bangladesh, Madagascar, Nepal, Pakistan Sudan and Tunisia, the importance was emphasized of "using" decent employment creation as a way out of poverty through the formalization of the informal economy.[18] In Sierra Leone, it was stated that a way out of poverty cannot only be addressed through job creation, but rather the creation of work in the formal economy. In the CARICOM countries,[19] the dialogue referred to slow economic growth, unemployment and the disappearance of quality jobs from the formal economy and the public sector, as well as fiscal restraint, which have a direct impact on the quality of life and survival of Caribbean people. In Panama, it is considered that social exclusion in the country is largely explained by the fact that around 40 per cent of non-agricultural workers can only have access to informal jobs. It was estimated in South Africa that **underemployment** is growing in sub-Saharan Africa.[20] It was also recalled that, despite the ratification by Lesotho of 23 ILO Conventions, poverty and inequality remain severe, even among those who have work.

The dialogue in Portugal highlighted that globalization and the digital revolution have, on the one hand, allowed many millions to rise above the poverty line, but have also resulted in **increased income inequality**. It is estimated that the recent digital revolution has contributed to increased inequality in OECD countries. The technological revolution has also contributed to an increase of capital income, to the detriment of income from labour. This means that the share of labour income generated by the economy is smaller, with a greater share going to those who profit from capital income.

As indicated during the Italian national dialogue, technological transformations that have a substantive impact on the quantity and quality of work, might also change the role of work in society. For this reason, the economic and social policies adopted will be essential instruments to conduct these changes. In this context, the "frightening speed" of change due to technological progress is seen as one of the main causes of rising inequality between countries and regions, as well as between workers (due to differences in the employment relationship), age groups and the different groups in society. In a sense, the debate is turning towards the idea of a new **"social contract" that could mitigate these inequalities**. In Uganda, one of the guest speakers concluded that "the major outcome from the future of work process should be a new social compact between government, business, education, workers and the community to manage not only technological disruption, but also core values that will deliver a versatile and competitive workforce. Tomorrow's place of work should be able to achieve a good quality of life and provide dignity and meaning to tomorrow's worker." In one of the national dialogues in Argentina,[21] with reference to the State as guarantor of justice, a Government representative referred to the role of the State in the current rupture of the social contract, emphasizing the need to restore a fair order and social decision-making. In contrast, it was agreed in the Nordic countries during the second national dialogue that the "Nordic model"[22] is the solution "or missing link" that provides the benefits of globalization and technology for economic growth and prosperity, and at the same time distributes it

equally. It was therefore concluded that it is important to maintain the "Nordic value model" in these changing times.[23]

It was concluded in the national dialogue carried out in the Russian Federation that the **social partnership** in the country ensures the accommodation of workers' and employers' interests with regard to matters of industrial regulation, on the basis of ILO instruments. The introduction of information technologies, the automation of production, and a decrease in manual labour will reduce the number of salary workers, build up the number of own-account workers and relocate personnel. This will require new rules for labour relations on the basis of the social partnership.

The national dialogues in several countries outlined **a desired path of development**. For example, in Cameroon, it was concluded that it is necessary to go beyond meeting the basic needs of workers and to provide for the well-being of workers and their families. In Uganda, discussion of "Uganda Vision 2040" referred to the aim to transform Ugandan society from a rural to a modern and prosperous country within 30 years, with the objective of Uganda becoming a middle-income country by 2040. The national dialogue in Thailand focussed on the "Thailand 4.0" initiative, through which the Government is working to promote a new economic model aimed at pulling the country out of the middle-income trap, and pushing it into the high-income range. In the Czech Republic, discussion covered the aim of meeting the third stage of EU accession through the adoption of the euro and the convergence of living standards and wages in the EU.[24] The specific measures adopted for this purpose may involve raising the minimum wage in individual Member States and introducing it at the EU level. While the dialogue in Germany outlined strategies for continued development in the context of technological change, emphasis was placed in Austria on the development of a "Digital Roadmap", based on a timeframe until 2025, to ensure that the country has an appropriate level of technology and skills in the labour force to be competitive in the global labour market. In the case of Switzerland, the social partners have agreed to the idea of adopting a Swiss declaration on the future of work to mark the centenary of the ILO in 2019.

The dialogues in a few countries referred to **happiness**, in the sense that, once basic needs have been addressed, it will be possible to concentrate on being happy, with all that that entails. In Portugal, it was considered that the future of work should be envisioned with three objectives: less suffering, more creativity, and more dignity and happiness. This involves societies ensuring the conditions to guarantee citizenship and democracy. In Mauritius, the concept of the Gross Happiness Index (GHI) was proposed to measure the level of happiness in relation to GDP, such as in Bhutan. In some dialogues, for example in Spain, work was referred to as a source of well-being and happiness, when it is decent and good quality.

It was emphasized in Namibia and Liberia that work should provide an opportunity for self-realization and personal development, while reference was made in Japan to a society in which every individual can "shine". The belief was expressed that by 2035 people will not be working just to earn a living, but to attain "self-fulfilment", in a mutually supportive environment made up of individuals engaged in work that allows them to work to the best of their abilities, in a society in which everyone has their own place.

1.2.2. The knowledge society and the risk of increased inequality

The trend today is for production and services to be based on knowledge-intensive activities. The key component of a knowledge economy is greater reliance on intellectual capabilities, rather than physical inputs or natural resources. Many countries, and particularly developing countries, emphasized that they are "losing the battle of the knowledge economy", which leaves them at an additional disadvantage in the global market and is increasing the wealth gap between regions and countries even further. Many developing countries, such as Comoros and Kenya indicated in their dialogues that they are afraid of being left behind in the technology race. Reference was made in Uganda to the need to achieve **"digital equality"**, while the discussions in Bangladesh, Israel, Hungary, Nepal, Panama, Thailand, Spain and United Republic of Tanzania envisaged the possibility of closing the digital divide. The main strategy proposed for this purpose is making adequate technological training available to the population, and particularly to young people. As a result of technological change, a new phenomenon was discussed in Poland, known (by the trade unions) as the **"digital wild west"**. This is a situation in which workers from countries where no employment standards are in force compete with those from developed countries where such standards exist, leading to everyone in the global market competing towards lower wages. Similarly, the Norwegian employers' representative in the Nordic dialogue warned about the risks of creating a **"digital underclass"**. From another angle, the dialogue in the Arab States noted that the Arab world lags behind and suffers from an evident **digital gender gap**. While 46.2 per cent of Arab men have access to the Internet, only 36.9 per cent of Arab women do. If this digital divide persists, women will find themselves at a disadvantage in acquiring the skills necessary for the future.

Developed countries, such as Austria, Belgium, Germany and Switzerland, are leaders in knowledge creation. In their discussions on the future of work, access to the latest technologies is taken as a given while their reports outline strategies to remain "on top" of technological development. During the dialogue in the Czech Republic, an increasing tendency was noted in high-income countries to characterize this as a **"labour versus labour" problem**, putting workers from advanced technology countries against workers in developing countries, while in fact it is a "labour versus capital" problem. In addition to excessive "optimism" regarding job creation as a consequence of new technologies, the national dialogue in Hungary concluded that the success of the future labour market lies in the adaptive and flexible nature of the workforce. It was emphasized in Poland that "current technology is changing more quickly than the awareness of employees, which is important from the perspective of the choices of work". Similarly, it was observed in South Africa that the decline in employment in more capital intensive and digitalized sectors is likely to widen inequality between the wealthy and the poor.

The dialogue in Nepal identified the need to use technology to **increase awareness** and responsiveness to decent work among the different actors, for example by enhancing the Government's capacity to raise awareness concerning the improved implementation of ILO Conventions, which might in turn also increase awareness of employment challenges, such as the significant employment deficits, including the lack of decent jobs and the increase in unsafe migration for work. The need was highlighted in Nigeria for reorientation, sensitization and awareness-raising among citizens concerning the adverse effect of cultural practices on the world of work. In Pakistan, it was acknowledged that one of the factors that could

improve working conditions is improved information/knowledge sharing on decent work among the various stakeholders. In particular, the Government should create awareness of labour rights, strengthen the existing system and raise awareness of the potential of community ownership and the need for the proper implementation and monitoring of labour laws. In Nepal and Bangladesh, reference was made to the role of the media in giving "the right picture" of the situation. In Austria, the **media** were referred to in the context of civil courage and culture.

The importance of **social media** was highlighted in Kenya, where it was noted that social media have entered the operations of virtually all organizations, households and individuals. Mobile devices have become the office, classroom and concierge. In most organizations, recruitment starts with employers placing adverts, potential applicants exchanging views about the job on social network platforms, and employers screening job applications, all via social networks. Corporate social networks are also rapidly growing inside companies, and social media literacy is increasingly a requirement for all employees. This means that leaders, including trade unions, have to learn how to blog. Social media have typically changed the nature of work from physical to virtual presence, with a resulting change in traditional working arrangements whereby employees operate from a specific physical location. It was noted that in South Africa, due to the increased popularity of social media as the key channel of communication, the jobs of postal workers are nearly extinct. In the context of the increasing digitalization of the world of work, the necessity was emphasized in Germany for clear regulation on employee data protection, as digitalization will provide employers with far-reaching monitoring possibilities through social media. In countries such as Trinidad and Tobago, the positive use of social media was proposed to address various types of issues related to the world of work, including the lack of awareness of workers' rights.

1.2.3. Increased productivity. Who profits?

Decades of increased productivity have not resulted in more equal societies, as wages have not risen and there has been no real impact in reducing working hours. This was highlighted by some countries, such as Nigeria, where it was emphasized that adequate earnings and periodic wage reviews are needed, based on productivity and inflation rates, as well as a robust system for measuring productivity. Improved productivity is essential for global competitiveness.

Several dialogues, including those in Argentina, Germany, Portugal and Rwanda, called for the adequate distribution of potential productivity gains due to automation. The dialogue in the Former Yugoslav Republic (FYR) of Macedonia, in relation to the distribution of productivity gains, called for an appropriate social protection floor with a good pension system for the future. The flat-rate tax system in the country was challenged as an obstacle to wealth distribution.

In Israel, it was concluded that it is necessary to focus on strategies for reducing existing gaps through increased productivity, the adoption of advanced production methods and the raising of capital (actual and human) for employment, leading to a rise in the average wage and in standards of living.

1.3. The purpose of work in society

1.3.1. Culture and values

In some countries, such as Trinidad and Tobago, culture was identified as an important factor in the future of work. During the dialogue in Pakistan, the view was expressed that future work should be in **accordance with the local culture**, and that aspects of decent work that are aligned with local customs should be highlighted so that society can promote decent work, rather than acting as a barrier. In the South African dialogue, it was agreed that the conceptualization of work and society in the country needs to be **different from the Western perspective**. There is a false separation in South Africa between the haves and the have-nots, workers and the unemployed. Yet the two are enmeshed, with the income of workers being shared/distributed among a high number of dependants, including those who are unemployed, and those in vulnerable and precarious work. Although income-earners and their communities are distinct from one another, the realities of the two are closely intertwined.

The dialogue in Nigeria identified **religion and culture** as major elements in society that shape the world of work. For example, culture in the northern part of the country used to impose strict restrictions on the exposure to the public of women, who were therefore confined to domestic work, limiting their opportunities to perform certain jobs. However, this practice is disappearing as a result of modern education. In the eastern, southern and western parts of the country, greater value is placed on education for boys than girls, limiting the ability of women to compete effectively with their male counterparts in the political and social spheres. However, culture is dynamic, and nearly all of these elements are undergoing processes of change. It was noted in Senegal that social views of labour have been affected by both colonialization and Islam.

Other national dialogues referred to the culture of work. The issue was raised in some African countries of the need to change workers' attitudes towards work. In Tunisia, it was indicated that "the absence of a **working culture**" has been reinforced since the revolution. The dialogue in Nepal referred to structural problems relating to **cultural unemployment** due to the lack of a culture of work and the absence of dignity at work in society. It was indicated in Pakistan that it is necessary to increase awareness of discipline as a cultural trait. Workers should be treated with equality and appreciated for their hard work, and any **stigma** attached to traders, for example, should be removed.

In Namibia, reference was made to the need for systems that can raise the alert concerning the societal challenges facing the world of work. It was also considered that "there is a need for reorientation, sensitization and awareness creation among citizens" on the adverse effects of superstition and retrogressive cultural practices relating to human capital development.

With a view to increasing productivity and performance, the dialogue in Guinea called on employers to develop an organization of work that maintains the enthusiasm of workers and their adherence to the values they believe in. The German White Paper identified seven typical **value systems** with different perspectives in relation to work. Socio-demographic characteristics, such as age, income and level of educational attainment, can only partly explain adherence to certain value systems, in contrast with the traditional social environments

of earlier times. In terms of the attitudes and positions which guide action, these value systems are in some cases diametrically opposed. Differences exist not just in perceptions of the status quo, but also in views on shaping Work 4.0. What some regard as a desirable future is a threatening scenario for others.

The dialogues in Cameroon, Bangladesh and Kenya referred to **dignity** as one of the objectives of decent work. One challenge identified in Nepal is how best to achieve the dignity of work and dignity at work, and how to inculcate a positive work culture by changing the value system associated with work and employment. It was emphasized in Sierra Leone that work empowers individuals' economically in society and restores dignity and self-respect, which in turn enhances tranquillity and peace in society and development in general, as well as cohesion. It was emphasized in China that workers' rights and dignity should be protected. In view of the emergence of new forms of production and management, it is important to improve understanding of social and real life at all levels of society.

The issue of corruption

The issue of corruption as a barrier to development was raised in the dialogues in several African countries. Reference was made, for example in Nigeria and Uganda, to the need to stop corruption. Pakistan made the same plea. It was emphasized in Uganda that corruption offenders should be heavily punished with imprisonment and the confiscation of their (ill-gotten) assets. In the national dialogue in the Czech Republic, it was noted that many countries say they are serious about fighting corruption, but very few are ready to protect whistleblowers. Public Services International (PSI), together with other unions, have been calling for an international labour standard for the protection of whistleblowers.

1.3.2. Remuneration and well-being?

The dialogues in many countries, including France and Spain, touched on the principles set out in the ILO Constitution and the Declaration of Philadelphia,[25] which affirm that "labour is not a commodity" and that "all human beings (…) have the right to pursue both their material well-being and their spiritual development in conditions of freedom and dignity, of economic security and equal opportunity".

The meaning and value of work for the individual have and will continue to evolve. While, during the first industrial revolution, the purpose of work was to put food on the table, it has taken on a different meaning over the past century. Over time, the concept of personal development and identity linked to a job/career has become the norm. Nevertheless, to achieve personal well-being, a number of needs have to be met, starting with fair remuneration. The dialogue in Lithuania noted that fair remuneration is related to both quality of performance and working conditions. It ensures welfare for the family and the home, the possibility of self-realization, both at work and in social life, and offers mental and economic security.

In Poland, it was noted that the need for self-fulfilment and development (rather than economic necessity) is what determines performance at work. The dialogue in the Russian Federation

agreed that, in addition to income security, self-realization and satisfaction through work are important. It was emphasized in Senegal that the value of labour includes self-development and social recognition, while in Spain work is only considered to be a source of self-satisfaction and well-being if it is decent and good quality. During the dialogue in CARICOM, employers and trade unions were identified as those responsible for promoting personal development.

1.3.3. Creating healthier workplaces

The need for good health care was highlighted in many dialogues, including in Madagascar. It was noted in South Africa that there is a need to further engage in the current healthcare system, including the implementation of the national health insurance system. It was concluded in Lesotho that there is a need to strengthen health systems so that they become resilient in dealing with incurable diseases, such as HIV and AIDS and tuberculosis, which reduce labour market outcomes. In Cape Verde, it was emphasized that, without health, it is impossible to talk about decent work.

It was emphasized in Pakistan that a **worker-friendly atmosphere** should be created in workplaces and that workers should be provided with a healthy working environment to attain the best results. Reference was made in Hungary to the campaign for "Healthy Workplaces for All Ages", which highlights the importance of maintaining elderly workers in employment. It is essential to understand the importance of a healthy workplace in prolonging the working life of employees. A healthy working environment improves the general health and well-being of workers, while enhancing both physical and mental health at every age. By retaining older workers, a company can improve productivity and long-term cost efficiency. It can benefit from experienced workers in many ways, while also reducing staff turnover.

Another measure that can improve the workplace environment, as indicated in Uganda, is the provision of facilities for breast-feeding at the workplace to help mothers save time and improve the well-being of their babies.

Growing concern was expressed that the proposed increases in flexibility will adversely affect health, particularly through an increase in stress levels. It was recalled in Germany that the trend for greater flexibility in working time and location, although offering opportunities for greater self-determination, is also resulting in a **"breakdown of boundaries"**.[26] This can lead to the dividing lines becoming blurred between work and personal life, work and leisure, the workplace and the home. It can therefore cause stress, giving rise to new OSH challenges. In Barbados, stress is an issue that affects the workforce and requires attention, while **burn-out** is believed to be caused by staff shortages, and affects the country's ability to meet the demands of a changing workplace. The dialogue in Belgium also concluded that the way in which labour is organized should take account of the fact that people are turning away from the labour market because of burn-out and stress-related diseases. Participants in the national dialogue in Belgium regretted the lack of infrastructure to care for workers suffering from stress and the lack of treatment to prevent burn-out. The "emergence of the performance society" was also discussed, and it was observed that performance in its extreme forms can bring individuals into competition with themselves. It was emphasized in Mauritius that stress management is needed at the workplace, and that stress among workers is a result of mismanagement and the undue pressure sometimes placed on employees.

In addition, in Madagascar, it is recognized that harassment is one of the "dangers" existing in the workplace. From another viewpoint, in Sao Tome and Principe reference was made to the high rate of alcoholism among the population as one of the elements holding back national development.

1.4. A changing labour force

1.4.1. The families and the changing role of women

During the first Nordic dialogue, it was agreed that gender equality is an important principle and policy goal, and also to a large extent a prerequisite for economic and social development. It is considered in Germany that the transformation of the economy and society is being accompanied by **changes in lifestyles** and values, such as a changed vision of family life and social cohesion, greater diversity in life plans and work preferences, and new consumer attitudes. The transformation of social values and relationships is also reflected in a more partnership-based conception of gender roles. Due to the steady rise in women's labour force participation, there is a more equal sharing of family responsibilities (a similar conclusion was also reached in Liberia). German policy-makers have responded to the desire by workers to share parental responsibilities on a more equal basis by introducing a "partnership bonus" in the Parental Allowance Plus, which encourages both parents to work part-time within the range of 25 to 32 hours a week.

The importance was highlighted in Trinidad and Tobago of developing family-friendly workplace policies and institutionalizing paternity leave. In Kenya, it was considered that flexi-time will provide opportunities for women to work and take care of their families. The employers' representative in the Arab States said that employers must adapt to the needs of women workers in terms of flexible working hours, day care facilities and working from home. The dialogues in some African countries, such as Sierra Leone, drew attention to the need to redirect the discussion towards changes in family structure. Most dialogues also referred to the increasing numbers of women in the labour market.

In Spain, it was recalled that one of the social trends with the greatest impact on the world of work is the change in the family model. In both Spain and Bangladesh, women are increasingly gaining access to the labour market. On the contrary, it was noted in Senegal that women continue to play a traditional household role. It is recognized that fostering the role of women in the world of work is still a great challenge in Pakistan, mainly due to societal and cultural constraints which reinforce stereotypes and exclusion. However, it is hoped that technological change will bring positive effects to the work-family balance. In Jordan, although the gender gap is being closed in relation to women's education, this has not yet been achieved with regard to their participation in the labour market.[27] It will not be possible to take advantage of opportunities that may arise out of changes in the world of work if Jordan is unable to take into account the needs of almost half of its working population.

In Saudi Arabia, where the national dialogue focussed on "increasing the Saudi labour force", it is hoped that telework will provide a new channel for employment for all Saudi nationals, and particularly women in remote areas. The goal is to establish a technological platform enabling flexibility through distance work in the private sector, either at home or

elsewhere. IT also offers increased scope for remote work and virtual employment in Nepal, with new opportunities to reconcile professional and family responsibilities through a more satisfactory and equitable work-life balance, of which women and marginalized communities will potentially be the principal beneficiaries.

1.4.2. A 24-hour society and the issue of working time

A discussion on flexibility and the **24/7 society** in Barbados highlighted issues such as teleworking and productivity, although it was pointed out that not all organizations are in a position to introduce flexi-time and not everyone is open to working non-traditional hours. From a different perspective, workers in Nigeria advocated 24-hour service in all economic sectors, including the administration, although that would depend on a reliable energy supply (electricity). Nevertheless, it was generally agreed that the ideal is to work towards an **eight-hour** working day. In Cameroon, the view was expressed that a system of work that accommodates the continued rotation of certain jobs would facilitate production and development.

In contrast, workers in Spain warned against the dangers of a 24/7 society, in which hours of rest are not respected and **privacy and intimacy** are at risk. The dialogues in Belgium and Mauritius also considered the move towards a 24-hour society as a danger for workers' health. In this regard, reflection in Germany revolves around the impact on work of a fully interconnected world, and how flexibility in working time and location can be used to develop new solutions for a work-life balance and to achieve a fairer distribution of paid and unpaid work between men and women. It was added in Germany that society should move towards a smart personnel policy focussing on "the whole person", which takes into account issues such as work-life balance, opportunities for advancement and personal development, education and continued training, health and good leadership, the age/ageing-appropriate organization of work and a good transition to retirement. Reliable public infrastructure will be necessary, especially for child and long-term care.

On a different note, a shift has been noted in Australia in working hours, from full- to part-time employment (mainly for men), largely driven by the ongoing transition from the full-time dominated manufacturing, mining and related industries towards the services sector. There is also a shift towards stronger growth in full-time employment for women, which represents a change in labour market patterns in Australia that is likely to shape income at the household level. Reference was made in many countries (including in the African region) to the possibility of flexible working time (flexi-time) increasing labour market inclusion (particularly for women with family responsibilities), for example in Uganda and Portugal. The question was raised in Brazil as to why teleworking has not expanded more in view of the desire for a good quality life. The national dialogue in Lesotho suggested that the law should allow for more flexible working hours, including night shifts.

It was noted in Kenya that traditional full-time employment is diminishing, while other forms of work are emerging, as illustrated by the introduction by the Government of contractual employment for Cabinet Secretaries and public secretaries. This trend has also been extensively followed by international organizations and the private sector in the country.

In South Africa, it was observed that technology is changing working time and space, leading to the disappearance of many traditional distinctions between work and society, while connecting the global and the local more closely in the growing internationalization of production.

1.4.3. Mobility and transport

A few countries raised the issue of mobility and transport. Reference was made in Sierra Leone to the need for **increased mobility**, both in terms of moving from one job to another, as well as moving to other countries to work.

In Austria, it was suggested that action is needed in relation to transport. In Brazil, it was pointed out that policies to promote the automobile industry are contradictory to the search for improvements in collective transportation and **urban mobility**.

The dialogue In Switzerland, in view of the emergence of new (professional or non-professional) services, raised the issue of the adaptation of existing laws on the transport of third parties in vehicles. Digitalization could not only lead to innovative new **mobility services**, but could also transform mobility in a whole range of means of transport. A key question is whether and how the country should push for the exchange of mobility data in general, and in particular how access could be allowed to booking and distribution services with a view to fostering sustainable and efficient transport chains.

In Japan, it was considered that traffic jams will be mitigated by 2035 through automated driving and optimal guidance systems. Shinkansens (bullet trains) and aircraft will become faster, and there will be easy access to hub airports 24 hours a day. Linear motor[28] vehicles will shorten **travel times** between the main cities, offering the population greater choice in where to live. The shortest door-to-door travel times and the cheapest fares will be displayed automatically for all schedules, offering greater freedom of travel. As indicated in the Italian national dialogue, technological transition is substantially changing the conceptions of place and time of work.

Conversation 2: Decent jobs for all

2.1. Full employment?

The possibility was raised in the previous conversation on Work and Society of other ways of organizing society beyond decent jobs for all, for example through basic income. However, as most national dialogues, with certain exceptions, such as Japan, concluded that the only realistic strategy for the future is through decent jobs for all, the present conversation is based on that assumption.

No national dialogues questioned the ILO's **Decent Work Agenda** (in other countries, such as South Africa, the discussion covered the basis of the Decent Work Agenda),[29] including in relation to Sustainable Development Goal (SDG) 8 on "Decent Work and Economic Growth". The four pillars of the Decent Work Agenda were mentioned in different ways by the various national dialogues: (1) standards and rights at work (including fundamental rights, such as child labour and forced labour) were considered by Arab States, Argentina, Cape Verde, Madagascar, Namibia, Pakistan, Rwanda, Sierra Leone, Sri Lanka, South Africa and Trinidad and Tobago, among others: (2) employment creation and enterprise development were covered by almost all countries; and (3) social protection and (4) social dialogue were broadly covered and included in the dialogues.

This conversation considers both the qualitative and quantitative aspects of the creation of decent job. It was highlighted by Japan that in promoting decent work for all, the key will be fairness. It will be critical to address the increase in disparities between large corporations and small and medium-sized enterprises (SMEs), as well as between regular and non-regular workers, between men and women, and among regions.

While the dialogues in developing countries addressed the importance of job creation and improvement in order to create decent jobs for all, it is unclear how realistic they are in this respect. In the United Republic of Tanzania and South Africa, for example, the discussion questioned the capacity to create enough jobs to achieve full employment.[30] It was noted in the South African dialogue that the notion of full employment and decent work, while a noble goal, appears to be unreal and unattainable within the dominant world economic system, since there is no realistic chance of achieving more "realistic alternatives" through the National Development Plan, including low unemployment and limited involuntary underemployment.

It was recalled in the Spanish dialogue that, although faced with many changes, we cannot ignore the goal of full employment and decent work for all, as well as social protection for all, which should be at the centre of the debate.

In Portugal, full employment was considered to be a "dream", while for other countries including Comoros, Netherlands, Russian Federation and Trinidad and Tobago, it is a goal. The

subject was discussed in Madagascar, Mexico, Mauritius and Peru in the context of achieving SDG 8 on "Decent Work and Economic Growth". It was considered in France that the ILO has an important role to play in achieving the objective of SDG 8, and should coordinate the various stakeholders. In Guinea, it was indicated that the ratification and application of ILO Conventions on fundamental principles and rights at work should allow the country to achieve full and decent employment for all.[31] While the aim of full employment is almost within reach in some regions of Germany, for some sections of the population (people with disabilities and those with a migrant background) the level of unemployment has not declined significantly in recent years. Full employment with "good work" for all remains a goal.

2.2. A changing labour demand

2.2.1. Employment creation: Multiplication or destruction?

Central to the discussion of how we will live in the future is the question of employment, and how our jobs will influence us in the future. The importance was highlighted in the Russian Federation of **humanization of labour**,[32] quality jobs and effective institutions as the three main components that will lay the groundwork for the future of work in the country. Similarly, one dialogue in Central America and the Dominican Republic concluded that the human being must be central to the discussion of the future of work.

Several dialogues, including those in Mauritius, Namibia, Uganda and South Africa, noted that the plausibility of a **single job** throughout working life has become outmoded in the contemporary world of work. Reference was made in many countries to the "gig" economy (see Conversation 3) as the future "organizer" of (multiple) jobs. It was noted in Japan that by 2035 individuals will be working in **multiple jobs** on different projects for different companies. There will be much more flexibility regarding hours of work, the tasks performed and the jobs done. Part-time workers will be considered to be working full time. People will also work for both a company and for themselves at the same time, with the multi-job approach mitigating the risk of unemployment to a certain extent. It was also noted that most people in Rwanda already have more than one job, especially in rural areas, and that there is a marked proliferation of short-term contracts in the country.

Two **paradoxes** were outlined in the Spanish dialogue concerning the types of jobs that will be available in the future. The first is that there will be fewer jobs, due to automation, but labour will also be lacking to perform certain functions. The second is that there will be less routine work, but that more intellectual jobs will include more routine elements. While some see this as an intermediate step towards automation, it does not appear likely that the most routine jobs will be 100 per cent automated. These two contradictory tendencies make it very difficult to know what is going to happen. In this regard, it was also emphasized in many countries that it is **unclear which jobs will disappear.** There is a belief in some countries, such as Panama, Thailand and Trinidad and Tobago, that low-skilled jobs will be automated first. However, there is a strong feeling in other countries that the assumption that low-skilled jobs will be the first to go is not necessarily true. It was noted in Japan that artificial intelligence is expected to replace intelligence and that its effects will be felt not only by blue-collar workers but also by white-collars and salespersons. The issue raised in the dialogues in France, Japan and Kenya is "what tasks can a human do that cannot be done by a machine". However,

the participants in the dialogue in FYR Macedonia do not feel particularly threatened by the potential automation of industry since, as they noted, such technology does not exist in the country. Their discussion, as in the case of many less developed economies, focussed on potential sectors for future job creation. The FYR Macedonia has witnessed an increase, rather than a loss of routine jobs.

Self-employment[33] was mentioned in many dialogues as an important source of future job creation. In some developing countries, mainly sub-Saharan, it is thought to be the only source. The belief was expressed in South Africa that jobs in the future will come from "green sectors" and that self-employment will increase exponentially.

Although countries are not always clear about which jobs will disappear and if jobs will disappear or not, a general feeling can be distilled from the national dialogues of **increased insecurity** in the labour market, as highlighted for example in the national dialogue in Poland.

2.2.2. Sectors of particular interest for future job creation

Reference was made in many dialogues to different sectors, sub-sectors and cross-cutting sectors of interest for future job creation. These include, in the case of Pakistan, manufacturing, software, marble, housing, automobile assembling, food-processing and online jobs. It is considered in the Republic of Korea that new technologies will not reduce work in terms of quantity, but that there will be a shift in the types of sectors that create jobs, and workers will need to constantly upgrade their skills to remain employable. The fear was expressed in South Africa that there will be a reduction in manufacturing jobs.

It should also be noted that the informal economy, which accounts for a huge part of the economy in most countries engaged in this exercise, was discussed extensively, mainly in terms of how it can be reduced to create decent jobs in the formal economy.[34]

2.2.2.1. Industrial sectors

Agriculture

Agriculture was mentioned in the national dialogues in many African countries as a potential sector for future job creation through, among other policies, the development of food value chains and the **"modernization" of production**. Agriculture is considered to be one of the most relevant sectors for the future of work in Barbados, Comoros, Kenya, Namibia, United Republic of Tanzania and Zimbabwe. However, it was also noted that the majority of Tanzanians are currently working in the agricultural sector in informal settings, and often live in poor and vulnerable conditions. To improve their living conditions, they need education, skills and a transformation in their mind set. Action is imperative to transform the sector and enhance productivity.

It is considered in Rwanda and United Republic of Tanzania that agriculture tends to offer vulnerable and unsustainable jobs, but will continue to play a key role in job creation. As noted in Argentina, agricultural production in Latin America is characterized by a high

concentration of workers and a high level of precarity, which makes it urgent to link the rural sector with decent employment. The urgency was emphasized in Nepal, Sao Tome and Principe, Seychelles and Timor-Leste of increased investment in agriculture if it is to remain a strong employment sector. In Japan, it was noted that the development of artificial intelligence will boost agricultural productivity.

The view was expressed that the capacity of the agricultural sector to create new jobs in Ghana and Uganda is limited, and that the number of jobs in agriculture will fall significantly in Jordan due to water scarcity. However, a reverse strategy could be to create jobs in water harvesting technologies and the maintenance of water resources in order to protect rural employment and create jobs in those sectors.

The possibility was discussed in the Belgian dialogue of **"urban farmers"** reintroducing local agriculture in urban areas in the near future.

Natural resources

Natural resources, including coal and diamonds, were highlighted as a possible job-creating sector in some countries. For example, Kenya could benefit from increased job creation in the extractive industries as a result of the discovery of **oil**, **gas** and other **mineral** resources, if they can be used sustainably. It was indicated in Uganda that one of its most important assets are its natural resources and that, if put to good use, decent jobs can be created in this sector. There is also potential for employment generation in the **water** resource and **energy** sector in Nepal. As the country is rich in natural resources, it was indicated in the United Republic of Tanzania that it is necessary to adopt and implement laws, policies, strategies and programmes to ensure that natural resources transform the economy and create jobs.

However, as indicated in Mauritania, the extractive industries (representing two-thirds of national exports), create very few jobs. Similarly, while mineral production and mining have increased dramatically, as indicated in Sierra Leone, their contribution to job creation remains very low (about 1.4 per cent). One of the major development challenges highlighted in Namibia that will affect job creation in the future is commodity dependence in the mining sector. The dialogue in Timor-Leste noted the potential for further job creation in the prudent use of natural resources, such as oil and gas, mining and forestry, but that it is necessary to create more incentives for the private sector by improving the legal environment, land ownership, credit for the private sector and skills development. It was recalled in Brazil that there is high potential to use the Amazon to develop knowledge about genetics.

Services sector

It is considered that there is the potential for increased growth in the services sector in Ghana, Kenya, Peru and Sri Lanka, where technological progress may lead to job creation. Sector specific job creation strategies are being implemented in Nepal in the services sector.

In Germany, job creation is **shifting from production to the services sector**. The growing interconnectedness and rise in cooperation between man and machine is leading to cultural and social shifts and new preferences are emerging in terms of demand for products and

services. These changes have the potential to increase demand for low-skilled work in the services sector. In a discussion of the development of online and mobile-based platforms providing services, it was considered that they have a high growth potential, but that this growth does not necessarily translate into a corresponding increase in the workforce. Finally, on the subject of artificial intelligence, there are indications that it has a significant potential to transform everyday working life, both in industry and the services sector, where knowledge-intensive occupations will be particularly affected.

Forecasts of the future labour force in Japan suggest that there will be an increase in telecommunications, medical and welfare workers, as well as those involved in other service industries, while the numbers of workers in all other industries are expected to fall. More jobs are needed in Lithuania for low-skilled professions in services. It was mentioned in the PICs dialogue that the regional telecommunications sector has undergone deregulation and reform, leading to a dramatic reduction in prices and greatly improved connectivity in the region. Private-sector initiatives include the development of digital tourism, and the growth of the Global Outsourcing Services (GOS) industry. Delegates agreed that the future of work in the PICs would involve greater use of new technologies including greater mobile phone coverage and internet connectivity, e-platforms, and the creation of jobs in areas such as digital tourism and GOS.

However, the belief was expressed in Mauritius that the changing manner in which services are delivered because of new technologies will have many drawbacks, including loss of employment.

2.2.2.2. Emerging "cross-cutting" economic sectors

The care economy

The dialogue in Japan considered that by 2035 employment will not simply be a means of earning money, but will also be a means of contributing to society, helping other people around us, coexisting with local communities, finding self-fulfilment, and acting with a variety of objectives. People will support one another mutually as individuals engaged in work that they are good at doing, allowing them to work to the best of their abilities, thereby achieving a society in which everyone will have their own place.

The dialogues in many countries discussed two different aspects of the care economy. The first is **unpaid care/family responsibilities**. Reference was made in many countries, including Bangladesh, Canada, Japan, Mexico and Uganda, to the balance (or lack thereof) between women and men. The discussion in Germany went further in raising the issue of State aid.

The second aspect addressed by some dialogues, including Barbados, China, Israel, Kenya, Mauritius, Panama, Poland, Portugal, Sierra Leone, Spain, Sri Lanka, Uganda and Zimbabwe, is **paid care**. It is considered in Central America that care services have the potential to be a source of job creation, "which is necessary to allow more women to enter the labour market" and, more generally, as indicated in Barbados, for people to be able to work outside traditional working hours. The view was expressed in Germany that working conditions in the care economy and socially necessary services should be made more attractive. In other

countries, such as Jordan and Nepal, the need was highlighted for a national policy on particular issues related to paid care to address the pressing question of the availability of day care services that are affordable and good quality.

It is foreseen in the Netherlands that there will be increasing opportunities in the health sector to minimize physically demanding, dangerous, repetitive, dirty or monotonous work. Routine work and data processing and analysis, work in which planning or prediction is a major factor, and tasks which often form part of highly skilled jobs can increasingly be performed by digital technologies.

The green economy[35]

The **greening** of the economy can result in both job destruction and creation. However the national dialogues, especially in Africa, clearly see the "green jobs sector" as a possible source of job creation. In certain countries (Germany, Ghana, Kenya and Uganda), a general need was expressed to take ecological issues into account. Other dialogues, for example in China, Comoros, France, Ghana, Israel, Jordan, Mauritius, Panama and Peru, indicated briefly that the green economy has the potential to create jobs. This possibility was also discussed in Central America and the Dominican Republic. It was considered in Brazil that green employment can leverage social inclusion and job creation. Other countries in which green jobs were mentioned in the dialogues include Argentina, Comoros, Panama, PICs and Spain, while reference was made in PICs and Seychelles to the **blue economy**[36] as a potential sector for future job creation. The PICs dialogue elaborated on the importance of sharing experiences from Pacific countries on how to maximize the job opportunities of new sources of growth from a just transition to a greener economy (e.g. using investment intensive employment programmes in public works).

It was considered in Rwanda that the green economy offers a unique opportunity to create jobs, but that it is necessary to look at the challenges lying ahead to make the most of this opportunity.

In Sierra Leone, it was considered that the need to develop the green economy and create jobs can offer opportunities to train women and improve their access to the job market. The dialogue in Liberia discussed the lack of skills in this sector as an alarming fact that needs to be addressed. The possibility was discussed in Portugal that changes in production and technology will require fewer, but better qualified workers in green jobs. It was considered in Indonesia that climate change is a key driver in the changing nature of jobs and that, if well managed, this transition could drive job creation.

Sectors linked to the knowledge economy

The discussions in many countries considered how sectors linked to the knowledge economy are and will be influenced by technological progress. Different approaches were expressed. In some countries, including Brazil, Comoros and Israel, it was considered that technological advances have the potential to destroy more jobs than create new ones, while the opposite view was expressed in others, including Ghana, Madagascar, Nepal and United Republic of Tanzania. South Africa stated that sectors that can grow jobs and place the country on a high

skills trajectory include the computer and mathematical job family within the broader ICT sector, and in components of the green economy.

A general (optimistic) conclusion was expressed in Belgium, France, Germany, Jordan,[37] Poland and Portugal that the effects of technological development on job creation are unpredictable, but that they can be shaped by society and policy-makers, just as they have been in the past. However, other dialogues, including those in Hungary, Japan, Kenya, Republic of Korea, Sao Tome and Principe and Switzerland, considered that technological advances will have a serious impact on the labour market, but that it is difficult to know in which way. While some jobs will be destroyed, others will be created.

It is believed in Belgium that big data offers an opportunity for research, as well as job creation. It was indicated that Nepal is focusing policy efforts on IT as a vital sector for employment generation by harmonizing IT with job creation (including skills development, IT education to increase employment opportunities, increased investment in IT infrastructure, the provision of integrated employment support services in IT and the development of an IT culture).

2.3. An outdated supply of labour? Adapting the labour force to skills requirements

As noted in the previous conversation and the section on drivers of change, the labour force around the world is changing. As demand for labour is changing, the supply of labour must adapt if decent jobs are to be created for all.

Overall consensus emerged in all dialogues that skills development is key to accurately matching labour supply and demand, today and in the future. It was recognized in most countries, including Namibia, the Russian Federation, Rwanda and Sri Lanka, that there is a skills mismatch between labour supply and demand. A good "match" is proving very difficult to achieve today, and will become increasingly difficult in the future. The difficulty of addressing the issue is due to the fact that demand for labour can no longer be predicted accurately.

One of the "solutions" suggested is to take the approach of "learning how to learn", instead of "learning how to do", through the development of **a different skills set**. It was suggested in Panama, for example, that the focus should be on the development of emotional intelligence, creativity, innovation, analytical skills, communication, social relations and other fundamental competencies that are transversal to the entire occupational pyramid and the different types of companies. It was indicated in Spain that, with technological advances, there will be changes in more repetitive job profiles, which will be destroyed or replaced by others that robots cannot perform. Investment in training for innovation, creativity, problem-solving and social, emotional and communicative skills will therefore be fundamental in ensuring that the skills of the workforce are adapted to the needs of companies. It was noted in Zimbabwe that the knowledge-based economy increasingly places a dividend on cognitive capacities and offers new perspectives to enrich the content and meaning of work. As such, it is becoming imperative to invest in critical and **strategic thinking skills**.

In Australia's national dialogue the importance of developing high-quality and **transferrable skills** through tertiary education was agreed by all participants. In addition, it was mentioned

that tertiary qualifications are now often required for lower-skilled jobs, but often the skills and knowledge learned in a degree could be outdated by the time an individual had completed university. This in turn implies that recognition of skill acquisition outside of a degree and formal training programs was an increasingly important policy issue. However, it must be recognised that skills are not always transferable and adjustment can be difficult. Also in the Australian national dialogue the opportunity was recognised for reskilling workers displaced from areas of declining employment for jobs in emerging or growth sectors.

Other countries see the solution in "predicting the future". A call was made in Lesotho's national dialogue for a strengthened labour information system. The German dialogue referred to the need for a "forward-looking and strategic skills policy", which would regularly monitor future demand for skilled labour and provide updated forecasts of trends in demographic, regional and skills-related mismatches, and thus serve as the foundation for a realignment of labour market policy. In Switzerland, the importance was highlighted of being able to find the necessary skills quickly on the labour market. One key element in meeting these challenges successfully is education and the manner in which it responds to the skills required in the future. It was also noted that, although the Swiss education system is healthy, also due to vocational education and training tied to the labour market, the education system faces challenges, especially regarding appropriate horizontal changes (at the same educational level), and whether vertical coordination between the various levels of education is necessary and feasible to address the digital transformation. In relation to the adaptation of workers' skills to the "digital era", Indonesia's second national dialogue focused on technology and discussed human capital development in that context.

In South Africa's dialogue, issues were raised concerning youth mobilization for the decolonialization of the education system and its impact on the future of work.

Similarly, it was considered in Panama that education and **vocational training** need to respond effectively to the requirement for technical, social and human skills. Azerbaijan stressed the importance of adapting TVET[38] to labour market needs. The entire national dialogue in the Republic of Korea focussed on skills and strategies for the future in a discussion of "Perspectives from Asia-Pacific in a TVET Forum". It was pointed out that globalization and the resulting workplace restructuring due to global value chains, rapid technological change and shifting demographic trends have placed pressure on TVET. There is therefore a need to review skills paradigms and strategies, focus on the current and emerging needs of industry, design programmes for current needs that are sufficiently flexible to accommodate new requirements and collaborate at the national and regional levels. Other dialogues, including those in Lesotho, Indonesia and PICs called for the strengthening of TVET, and the Russian Federation also called for the enhancement of its (TVET's) prestige.

In some countries, including Australia, Japan, Pakistan and Uganda, the issue of **life-long learning** was presented as one of the solutions to the skills mismatch. In the national dialogue in the Netherlands, it was emphasized that a culture should be created in which continuous learning is an integral part of the job, so that people (both low-skilled and high-skilled) and businesses become more agile and are able to anticipate new jobs, including those that will be created as a result of the development of digitalization and artificial intelligence. The creation of such a culture calls for a balanced division of facilities and responsibilities. In

any case, attention will definitely have to be paid to increasing the options and access to the labour market for low-skilled and vulnerable groups. This also means that employees will increasingly have to adapt to the changing circumstances and be able to keep their knowledge and skills up to date, supported by suitable facilities. The challenge is therefore to ensure that employees have enough options to prepare for the new situation and possible new training requirements, and to place the responsibility for this squarely with the government, employers and the workers themselves. It was stated in the Italian national dialogue that in order to adequately address the challenges put forward by technological change, the education and training system should be strengthened. In this regard, reference was made to the "dual system",[39] promoted by the Government since 2016, which combines school and training. This should be completed with a life-long learning system.

Some dialogues, including those in Australia, Cape Verde, Timor-Leste and Uganda, went so far as to say that their entire national **educational systems** need to be restructured/ modernised. National dialogues with high youth participation, including those in most Latin American countries, referred to investment in education that integrates a high level of technology training. The national dialogue in Turkey referred to the failure of the education system to meet the human resource needs of the future. The need was discussed in Brazil for a more flexible and innovative education system at all levels. It was considered in Swaziland that university has failed to keep up with current trends and has been overtaken by other institutions. It was stated in Japan that education will be the key taking into account that white-collar jobs include many routine tasks that are replaceable by technology.

The dialogue in the Arab States identified skills mismatches as one of the major challenges. The pace at which technology is advancing requires Arab countries to upgrade the skills of workers, and to introduce true reforms to their education systems to provide graduates with cognitive and non-cognitive skills that make them life-long learners. This is of particular importance for Arab women, who tend to be engaged in vulnerable employment and in jobs that will most likely be automated in future.

Emphasis was placed in Uganda and Viet Nam on the need for a better **link between business and training institutions**. It was noted in Sierra Leone and Kenya that partnerships between education and training institutions, industry and development partners need to be strengthened. The national dialogue in Iraq suggested revisiting its vocational training strategy and organizing a meeting to bring together the private sector, trade unions and the Vocational Training Department to identify the skills needed, as a basis for reviewing the approach adopted and using new vehicles to build skills and capacities.

The need was addressed in most countries to develop skills, education and training, (i.e. The United States of America[40]). Many countries focus on youth as it relates to allowing them to find jobs in the future. In some countries, such as China, it was simply noted that more vocational training needs to be provided. In other cases, including Kenya, it was suggested that workers should be provided with more "multi-skilling" training. And the subject of internships and apprenticeship was raised in Kenya and a few other countries, while some countries, including Lesotho, suggested the incorporation of entrepreneurship and life skills courses into training curricula.

In the Austrian dialogue, emphasis was placed on the importance of developing adequate digital skills among the population, as well as e-teaching and e-learning programmes, as part of the service agreement with learning institutions with a view to supporting research and innovation strategies.

Taking into consideration the specificity of the situation in Israel, which includes compulsory military service for all young citizens, including the development of various (labour market) skills, the national dialogue suggested that technological training should be improved during military service.

2.4. Cohorts highlighted in the national dialogues

2.4.1. Women

Reference was made in several countries, including Jordan and Pakistan, as well as in the Arab States and PICs, to the very low participation of women in the labour market. As indicated in the Arab Countries, this has concrete consequences in low social security coverage, the small number of women-owned businesses and lower access to ICT. Any future of work initiative should address gender inequalities. In this regard, it was emphasized in the Nordic countries that gender equality is a prerequisite for economic and social development. The importance was highlighted in the Nordic countries, as well as the Central American countries and Spain, of tackling gender inequalities, and particularly the gender pay gap, labour market segregation and inequality at the national, regional and global levels. In some countries, including Bangladesh, China, Nepal, Rwanda, Senegal, Sierra Leone, Uganda and Zimbabwe, gender disparities in social norms, education and skills development were identified as obstacles to women's labour market participation. Some governments, such as those of Senegal and Uganda, recalled that unpaid care and homework are carried out by women in many cases due to unequal social norms. It was argued in the dialogue in Sierra Leone that gender disparity in education and skills development is due to the low literacy level of women. In this regard, Bangladesh undertook in the Dhaka Declaration to promote gender equality in all skills development activities with the objective of providing employment-driven skills for women in non-traditional occupations as a means of promoting gender diversity and women's empowerment. Similar measures are being taken in the Arab States.

Reference was made in Cape Verde, Lithuania, Mauritius, Nigeria, Pakistan, the Russian Federation, Trinidad and Tobago and Zimbabwe to the need to ensure gender equality in the workplace. While women's labour market participation has increased in Mauritius, there is still room for improvement in the access of women to managerial positions in the private sector. In the context of globalization, reference was made in Brazil to the increasing feminization of low-skilled occupations, which are highly represented in global supply chains. Furthermore, as indicated in Germany, digitalization may affect women's labour market participation, as they are over-represented in the health, education and care sectors, which are less prone to automation. However, Nepal indicated in its dialogue that even if women can enter the labour market, the issue of the sharing of family responsibilities still persists due to social norms.

2.4.2. Youth

Youth related issues were referred to in a cross-cutting manner in many countries.

The national dialogues in India, Mexico, Paraguay, Peru and Uruguay focussed specifically on youth and the future of work, with a high level of youth participation. In the discussions with youth (which in some countries were supplemented by surveys covering other youth groups), one of the major findings is that, while adults are normally quite negative in their views on the future of work, young people are less so (in particular concerning technological innovations). The national dialogue in Paraguay included young persons in secondary and tertiary education, and the views expressed differed between students at school and those at university. While young (school-age) youth consider that what is most important is to generate more opportunities for access to traditional jobs, the vast majority of university students indicated that they do not plan to work as employees for a traditional company, but showed interest in personal projects, including developing their own enterprises, or working independently. In Uruguay, many young people emphasized that they had never reflected on their future work before attending the dialogue. Some of the issues highlighted in the "future of work youth dialogues" included proper education and training, flexibility in education, internships and scholarships, labour rights, better technological and linguistic training, gender and informality.

Other dialogues, including those in the Arab States, Montenegro, Sao Tome and Principe, the United Republic of Tanzania and Zimbabwe, held special sessions that included young persons, while others, such as those in Comoros and Madagascar, invited youth representatives to participate in the national dialogues. The dialogue in the Seychelles focussed on youth and proposed approaches to employment creation and the development of skills for youth. It was highlighted in the dialogue in the Arab States that technology can also play a role in alleviating the adverse consequences of conflict and fragility on youth. For example, Arab youth in Gaza, despite being situated in a military blockade, have been able to provide services remotely, facilitated through the gig economy and technology, to generate income in an economy suffering from extremely high unemployment rates and lack of economic opportunities. Technological advancement, with its role in giving rise to new forms of work (which, if not addressed through appropriate policy measures, are likely to be in the informal economy), emphasizes the importance of addressing the protection of workers and social justice as a priority for tripartite constituents. In the framework of the national dialogue in the PICs a special session on youth and entrepreneurship was held which addressed the situation of youth in the sub-region with respect, in particular, to difficulties in accessing employment and the skills mismatch.

All the national dialogues reflected on how youth will be able to deal with and be prepared for the future of work. Most national dialogues included youth employment as an important issue, such as the Russian Federation, while those in China, Sri Lanka and Uganda also covered the issues of livelihoods and drug abuse. A key policy suggestion in the national dialogue in Lesotho was that youth should be protected during learning and apprenticeships, although their wages can be set at a lower amount, and that employers should provide students with internships and mentoring as a way of gaining work experience.

Other countries, including Poland, Israel, Spain and Thailand, addressed the issue of youth in the future of work in the context of an ageing population. Some developing countries, such as

Sierra Leona, examined the issue from the viewpoint of poverty among the older population combined with high youth unemployment.

It was emphasized in Kenya, Nigeria, Rwanda, Senegal and Yemen that the situation requires more strategic and innovative policies and programmes for youth. It was noted that in Timor-Leste young people find it difficult to make the school to-work transition, and that the low level of education and skills limits their job opportunities.

2.4.3. Workers with disabilities

A few dialogues, including the Russian Federation, mentioned the very difficult dire situation of workers with disabilities. In the dialogue in Sierra Leone, it was highlighted that there are significant numbers of adults and children with physical and mental disabilities who have special needs and face inadequate specialized medical care, a lack of support for skills development and a shortage of opportunities for economic participation. Children with disabilities have little educational support, as there are no government schools to cater for their special needs. The few non-State schools that receive government grants are expensive and cannot meet the educational demands of children with disabilities. In the dialogue in Pakistan, in the context of the promotion of non-discrimination, it was noted that vulnerable groups, including persons with disabilities, should also be considered for productive jobs through favourable policies. In Bangladesh, studies have evaluated the cost of excluding workers with disabilities from the labour market. Reference was made in several countries, including Comoros, Jordan, Kenya, Madagascar, Nigeria, Rwanda, Senegal and Sierra Leone, to the need to take concrete measures to address the labour market participation of workers with disabilities. At the same time, some countries, such as Austria, Australia and Germany, the view was expressed that technological innovations will play a substantive role in facilitating the inclusion of workers with disabilities at work. It was recalled that some laws in the Arab States establish a quota for workers with disabilities of around 3 to 4 per cent of the total number of employees in large companies. However, enforcement is lacking.

2.5. Policy responses: Relevant and coherent?

It was argued in many national dialogues that, in order to make job creation and improvement a reality, it is necessary to ensure the relevance of the different policy tools. However, in the dialogue in the Nordic countries, many participants agreed that there is no need to change the "Nordic values model" that has served its countries so well in terms of wealth distribution, but instead to increase the capacity to enforce the rules by strengthening the courts, etc.

The lessons from recent decades, more particularly the post-crisis period, were discussed in the Liberian dialogue, which considered whether or not something has fundamentally changed in the working of the global economy which means that the policy instruments at the disposal of national and international policy-makers are incapable of generating the jobs needed in sufficient quality and quantity. The dialogue in Namibia highlighted a lack of capacity, engagement, evidence and strategic vision in the policy process. It suggested the strengthening of all national capacities, including those of the social partners to develop and implement appropriate policies. The importance of formulating evidence-based policies

was emphasized in several countries, including Jordan, Sudan, Timor-Leste, United Republic of Tanzania and Viet Nam. The importance of adherence to and implementation of **national development plans** (including "visions" see section 1.2 above) was emphasized in some countries, including Lesotho, which has recently prepared a National Strategic Development Plan that acknowledges the need for private sector development in sectors with high employment potential. However, implementation is a challenge due to political instability.

Most national dialogues referred to policy measures that need to be developed and/or adapted to ongoing changes in the labour market. However, only a few, including those in France, FYR Macedonia, Mexico, Senegal, Spain, Syrian Arab Republic and Zimbabwe, highlighted the importance of **policy coherence** in general. It was noted in Viet Nam that it is possible to learn from the experience of other countries, including the adoption of active labour market policies, taking a multiple approach, rather than just focusing on training, improving social dialogue at the workplace, establishing skills councils, considering how to balance flexibility and security through the improvement of the labour law system, and maintaining justice for workers who may lose out in this process. The need for consistency in government policies was noted in Nigeria.

Reference was made in some countries to **national employment strategies/policies** as a means of coordinating employment creation and improvement. The example was cited of the National Employment Policy (2014) adopted in Nepal, of which the strategic objectives are to increase productive employment opportunities, transform informal work and improve the quality of employment, develop knowledge and a skill-based workforce, ensure appropriate management of migrant workers and immigrant workers, generate youth employment, institutionalize a labour market information system, develop congenial labour relations and promote employment-friendly investment. It was noted that Nigeria is in the process of developing a comprehensive employment policy. The concluding remarks of the Jordanian dialogue indicated that there is no policy framework to adequately govern the world of work in the country, especially in relation to the employment of Syrian nationals. The representative of the Ministry of Labour explained that work will continue on the implementation of the National Employment Strategy 2011-20. However, the representative of the trade unions raised concerns over uncertainties relating to the future of work and the implementation of the National Employment Strategy.

While Germany stated in its national dialogue that the design of a macroeconomic framework, industrial and services policy, and support for research are all key elements in the role of the State in supporting structural change and providing a safety net, the need for macroeconomic policies that promote employment creation and poverty reduction was highlighted in Cameroon, Nigeria, Pakistan, Sao Tome and Principe, Senegal and United Republic of Tanzania. In the Nepalese dialogue, concern was expressed that the economy (both national and global) may not be able to generate enough jobs within the established policy parameters and support was expressed for mainstreaming the Decent Work Agenda in macro-economic policy. The importance of developing a good macroeconomic framework was highlighted in the dialogue in the Arab States, as the Gulf countries have been largely reliant on oil exports, while other economies in the region are heavily dependent on international aid and export low-complexity products. It was stated that these policies, coupled with numerous other social, normative and political challenges have led to several weaknesses in the labour market, including vulnerability, informality, gender inequality and other decent work deficits.

The dialogues in Lesotho, South Africa and Swaziland highlighted the importance of developing a regional labour migration policy, which must then be adapted to each country through national migration policies. It was noted that the South African immigration policy needs to take into account measures to promote regional cooperation and integration, relaxed visa regulations, the alignment of employment policies and the free movement of African citizens, and a focus on recruitment rather than controlling access.

Sectoral policies relevant to the future of work were discussed in some countries. For example, it is believed in the United Republic of Tanzania that the construction industry will provide opportunities for decent work in future. The Government was therefore called upon to review industrial policy so as to encourage women and youth to participate in the sector, as well as starting up their own construction companies. The need was expressed in Panama for policies to protect the manufacturing sector from market imperfections and to promote access to technological innovation with a view to improving efficiency. Nepal is pursuing land-use policies to enhance agricultural production and productivity, while protecting and promoting the rights and interests of farmers. The possibility is being considered in Switzerland of creating a positive environment for the digital economy through attractive economic policy conditions (including freedom of entrepreneurship, the principle of legal certainty, a flexible labour market, highly developed infrastructure, sustainable fiscal policy, a relatively moderate tax burden, a strong foundation in education and research, and a high standard of living).

It was emphasized in Germany that **labour market policies** offer more than simple support for labour market integration. A forward-looking labour market policy can play a significant role in preventing job losses, which was how it was possible to weather the 2008 economic crisis. It is considered necessary in Japan to adopt new labour policies ahead of technological innovations and changes in the structure of industry, which will inevitably transform the structure of work significantly. Without new labour policies, it will be very difficult for people to participate actively in the workforce. The need was highlighted in Portugal to develop public policies that include active employment measures and improve qualifications, and to adopt social measures, such as the social insertion income. It was highlighted in Yemen's discussion that employment, and in particular youth employment, should be mainstreamed especially to the public investment programs and the promising productive sectors towards poverty reduction and economic growth.

In relation to labour market policies, the discussion in most countries focussed on **active labour market policies** (ALMPs), with emphasis on skills and employability. Passive labour market policies (PLMPs) were discussed to a lesser extent. The need was highlighted in Israel to develop a proactive, relevant and efficient active labour market policy, based on more extensive collaboration with other parties. One of the challenges encountered has been informing the relevant population groups of the benefits provided for them through the various programmes with a view to improving the take-up rate of such benefits.

Almost all the dialogues referred to the need to adjust or develop **skills, education and training**, mainly for youth, and in some countries they addressed the need to develop skills and education policies. Focussing its policy efforts on skills development, Bangladesh is finalizing a Skills Development and Employment Act; rules for the establishment of an appropriate national skills development authority; the expansion of the National Technical and Vocational Qualifications Framework to broaden its coverage; and an assessment and

certification system through the recognition of prior learning for various skills and trades to facilitate worker mobility. The need was discussed in the Central America and Dominican Republic dialogue for technical education and training policies to be aligned with productive development policies. It was also indicated that a series of well-targeted active labour market programmes should be implemented in Timor-Leste to build human capital. A dedicated funding facility has already been set up to finance education and training. The importance of free education was highlighted in Swaziland. Rwanda, in its awareness of critical skills gaps and shortages in the country, has designed and implemented various policies and programmes aimed at filling skills gaps by developing skills for youth for the service and industrial sectors. The dialogue in the Netherlands calls for an active policy focusing on both continuous training and retraining and the adaptation of jobs, aimed at increasing the possibility of being active and healthy in old age. While the national dialogue in Turkey noted that, as many current workers will lose their skills within the next decade, there is a need to develop a new training policy to re-equip people with the necessary qualifications. The union representative in the Portuguese national dialogue called for the involvement of the social partners in the definition of education and training policies.

It was also suggested that national qualification frameworks for vocational training should be adopted to serve as a basis for the recognition of labour skills at the regional level. The need was emphasized to develop a skills-qualification framework in Nepal that meets international standards to promote recognition of the qualifications of migrant workers, as well as their experience abroad. Tertiary education and vocational training institutions in Swaziland should be aligned with their Southern African Development Community (SADC) counterparts through the harmonization of skills for the regional exchange of skilled migrant labour. In addition, financial and recruitment policies should allow wage remittances and the reintegration of returning migrants. The workers in the Swazi national dialogue noted that there is a need for a skills audit to be carried out on a regular basis in the region. Moreover, if a worker is found to be illegally employed in another country, the worker should be allowed a reasonable period to acquire a work permit.

A policy of continuing vocational education and training was suggested in Germany. The fundamental principle is for unemployment insurance to become more focused on prevention, with the aim of developing unemployment insurance into employment insurance (going from a PLMP to an ALMP focus) which actively supports transitions in working life through periods of continuing vocational education and training. Similarly in Japan, it was discussed that in order to avoid cases of unemployment, poverty or social exclusion, safety net measures such as skills training and re-education need to be in place. However, in Trinidad and Tobago, PLMPs were discussed in the context of, unemployment insurance as a means of addressing the "permanence of temporary employment". In addition, it was noted in Sudan that an unemployment subsidy has been introduced as a system of social care until the unemployed find work.

Some dialogues referred to issues relating to **labour market institutions**, which are covered in Conversation 4.

Entrepreneurship policies, including access to finance, business development services (BDS) and an enabling environment for small and medium-sized enterprises (SMEs), were discussed in several dialogues, including in Rwanda, Senegal, Seychelles, United Republic

of Tanzania and Timor-Leste. The dialogues in Madagascar and Uganda also covered the role of social entrepreneurship (cooperatives). In this regard, the role of cooperatives in cases of enterprise crisis under the system of "worker-buyout" was highlighted in the Italian national dialogue. The importance was emphasized in Central America and the Dominican Republic of providing support to SMEs to improve productivity and competitiveness, and for their formalization. The dialogue in Thailand called on the Government to adopt specific SME promotion policies to facilitate the expansion of foreign SMEs in Thailand and to help Thai SMEs become "tech savvy". It is planned in Cameroon to intervene in certain sectors to encourage the development of SMEs by vulnerable groups, including through the removal of institutional constraints which hamper the creation of SMEs, while reducing measures to promote self-employment in agricultural activities and the industrial and services sectors.

The need was indicated in Pakistan and Sri Lanka for an enabling environment for the development of start-ups. It was suggested in Austria that measures should be adopted, such as an e-one-stop shop to simplify company start-ups. The dialogue in Pakistan recalled the need for entrepreneurship education and awareness raising to showcase successful and innovative entrepreneurs and entrepreneurial ideas.

The dialogue in Pakistan noted that in the past self-employment has not been viewed as a priority. However, as it could be a major source of job creation, the Government should therefore adopt policies to facilitate entrepreneurs or new business start-ups in innovative fields and to encourage young women and men to choose self-employment as a career.

Dialogues in all regions discussed the importance of well-developed policies to promote **rights at work**.[41] It was acknowledged by the dialogue in Kenya that concern for workers' rights remains a major policy issue in globalized production systems, where most jobs are informal and casual. The dialogue in Pakistan considered that job creation would be improved by ensuring workers' rights, enhancing intra and inter-governmental cooperation, the implementation of amended laws and compliance with international standards. The Government of Argentina referred to the need to respect fundamental rights at work, in particular the elimination of child labour. The dialogue in Rwanda highlighted the need to review labour legislation, as well as the regulatory environment concerning child labour and minimum wage. The need was noted in Cape Verde for the preservation of women's rights and the eradication of child labour. In Yemen, the need to address the wide prevalence of child labour and armed activities was mentioned. In Trinidad and Tobago, discussions focussed on discriminatory hiring practices, the lack of awareness of workers' rights and the role of the Equal Opportunity Commission. It was also noted that certain cultural norms affect the workplace and that workers with short-term contracts are more prone to discrimination. The need for tolerance was highlighted, together with the importance of focussing on human rights and the obligations deriving from international conventions. Respect for human rights was also considered to be a challenge in Madagascar. In Senegal, the implementation was recommended of the 1998 Declaration on Fundamental Principles and Rights at Work and the 2009 Global Jobs Pact. The dialogue in Mauritania referred to the need to strengthen freedom of association.

Concerning **social protection policies**,[42] the expansion of the coverage was discussed in many countries, including Nigeria, Portugal, Panama and Syrian Arab Republic. Dialogues in Africa, in particular, discussed the issue of expanding social protection to jobs in the informal economy. The need was flagged in Nigeria for effective, broad and well-coordinated

social protection. A suggestion was made in Germany for a "personal worker's account", as an instrument to support a work-centred social policy focussing on individual needs. Such an account would be established for all individuals and would accompany them throughout their working lives (this idea picks up on the French concept of a "personal activity account", to be introduced at the beginning of 2017).

Policies to support the transition to formality were referred to in almost all the dialogues in the African region including Cape Verde, Comoros, Kenya, Madagascar, Nigeria, Rwanda, Sudan, United Republic of Tanzania, Uganda, Zimbabwe and Swaziland. The need was emphasized to develop policies and programmes that support the transition to formality and contribute to the reduction of precarious employment. However, emphasis was placed in some countries, including Nigeria, on harnessing the potential of the informal economy. The dialogue in Namibia noted that informal operators should be allowed to exist, while being provided with assistance to improve their operational and working conditions, as transition cannot happen overnight.

The need to formalize the informal economy is not only a problem in African countries. The dialogues in other countries, both middle and low income, also referred to the need to develop policies addressing the issue. For example, it was noted in India' national dialogue that while being the world's largest democracy, also has one of the largest informal economies. It was emphasized that India should focus on formalizing the informal economy, alleviating poverty and improving the integration of women in the process of growth. In Panama, informal work is regarded as one of the main challenges for decent work. The formalization of the informal economy will require comprehensive policies to support productivity and improve working conditions. In the Uzbek dialogue, it was noted that the Government has applied much effort to transferring informal employment to the formal economy. Much awareness raising and many consultations with employers and workers have been carried out on the subject, especially trying to show the benefits of formalization.

Certain specific methods for promoting the transition to formality were highlighted. Policies were discussed to reduce barriers to formalization in Nepal, which could have a considerable impact on the incomes and rights of women, and consequently on families. It was emphasized in Madagascar that it is important to bring together small-scale informal workers in associations to form a platform. In that way, they can benefit from training courses (for example, on the management of associations, project development, advocacy and social dialogue) with a view to defending their position and facilitating their formalization. Workers in Ghana said that the Government should consider helping people in the informal economy to contribute effectively to economic growth.

Although **policies for the greening of the economy** can have a strong influence on both job destruction and creation, the national dialogues often referred to the job creation potential of the "green sector". The dialogues in some developing countries went beyond mere job creation potential. The dialogue in the Seychelles, for example, discussed the introduction of attractive and competitive wage schemes to entice people to work in the blue economy and renewable energy. It was emphasized that relevant response measures, such as those included in Indonesian climate change policies, are among the key drivers for changing the nature of work in Indonesia. The transition to socially and environmentally sustainable economies, if managed well, can drive job creation, job upgrading, social justice and poverty

eradication. However, the key to this transition is understanding the linkage between the labour market and green economy policies. Fearing the impact of severe water shortages, the Government of Jordan has placed the management of water resources at the forefront of national policy. Climate change is seen in Liberia as a major driver of technological change and innovation in the search for measures and policies to mitigate or help adjust to its effects. These changes imply that science, technology and innovation are now key to improving economic performance and social well-being. The dialogue in Nigeria emphasized the destructive impact of climate change on agricultural jobs, which makes the move to a green economy an imperative.

It was noted in the dialogue in the Arab States that the impact of technological change in the region will be realized after sometime and at a speed slower than many other regions in the world. This gives Arab states the time and opportunity to **adjust their policies** and adapt to the expected disruption. As such, countries in the region today must begin eliminating barriers to the adoption of ICT for both men and women, modernize skills among children and youth, advance the physical infrastructure needed, promote a better business climate and ensure ICT literacy. These policies, if implemented, will help the workforce in the region in the transition to the digital economy and will reduce technology-induced disruptions.

Some dialogues referred to the importance of **policy implementation**. For example, the dialogue in Timor-Leste emphasized that an important component of structural transformation is the ability of the various market players to work together and coordinate their efforts. The challenge is not so much the existence of policies, but their implementation. The importance of implementation was highlighted by the Nordic countries. In addition, the importance was discussed in Mexico of establishing monitoring mechanisms to assess the results obtained from programmes and policies, with a view to their adaptation whenever necessary. Similarly, in Swaziland, the Government referred to the need to invest in establishing a pool of implementation officers to monitor the implementation of Government policies and action programmes. While the national dialogue in Uzbekistan reported that annual programmes of employment promotion and job creation are developed on the basis of a thorough analysis of labour force supply and demand, with special attention being directed towards college and higher education graduates, returning labour migrants and other vulnerable groups of population. In Swaziland, it was noted that several laws that are in force were drafted over 40 years ago and are no longer relevant. These laws need to be reviewed. The political will is also required to ensure that all policies are adhered to by all parties. Conversation 4 looks at this aspect in greater detail.

Conversation 3: Organization of work and production

3.1. Evolving definitions of work, employee, enterprise and employment relationship

Very **few definitions** were provided by national dialogues within the framework of the various issues addressed. The dialogue in India referred to "the paradigm shifts brought about by changing and advanced technologies and by the evolving definitions of work, employee and enterprise". Some of these changes are due to processes of outsourcing, in which value is added at different levels and in different geographical locations. It was considered in Cape Verde that the concepts of employment, work, decent work and less decent work should be discussed more fully by the social partners to better understand their meaning.

According to the Tunisian dialogue, the notion of decent work should be enlarged to include independent work. The concept of worker will, as noted in the Portuguese dialogue, encompass different roles with a varying legal architecture, **which will have an impact on the responsibilities of employers**.

It was considered in Germany that there is no need for regulatory action on the concept of the "company". However, the manner in which crowdwork should be defined is contentious. In the Nordic countries, it was noted that it is urgent to clarify the definition of work so as to encompass the work performed in/through **platforms**, on the understanding that it is not a question of regulating work, but rather of controlling platforms. A discussion on the definition of self-employment showed that there are conflicting concepts. Sweden, for example, has a definition known as umbrella employment *("egenanställning")*[43] that would capture better the kind of employment that is being developed in the platform economy. It is a matter of urgency to have **well-defined concepts** so that the platform economy can be regulated and the laws adequately enforced.

It was noted in Germany that workers engaged in crowdwork are not employees, as there is no personal dependency. They are not subject to instructions, and can choose whether or not to take an assignment. Others consider that dependency exists when the parameters and framework are established in advance, and monitoring takes place through various mechanisms, including performance evaluation by clients.

The absence of a definition of employment in Australian law was addressed by a keynote speaker. It was considered that it could be helpful to incorporate an explicit definition of an "employment relationship" in the Fair Work Act 2009, although the proposal has already been rejected on the grounds that it would "create uncertainty" (Productivity Commission, 2015).

It was considered in Trinidad and Tobago that the legislation should redefine the meaning of contract and non-contract work, their advantages and drawbacks. It was also noted in Spain that concepts such as workplace and working time are no longer well delimited. In South Africa, emphasis was placed on the need to **broaden the concept of work** so as to also include "reproductive work", which is carried out mainly by women and should be adequately recognized.

3.2. Organization of work: Between tradition and new business models

3.2.1. The employment relationship called into question

Several national dialogues indicated that the traditional employment relationship has been called into question as a basis for the organization of work. As noted in Germany, reality shows that the traditional standard employment relationship is less and less the norm. Indeed, there is a constant move from standard to non-standard forms of employment. This raises the need, according to the German view, for a "new standard employment relationship" in which traditional standard forms should not necessarily, and on each occasion, be contrasted with non-standard forms, such as part-time work. For example, it was considered in Thailand that, in the same way that employers will be required to change the way they do business, workers will have to move to non-standard forms of employment.

3.2.2. Moving to less standard forms of employment

As indicated in South Africa, there has been a significant shift from the standard employment model to new forms of employment with limited social protection. In fact, there has been an evolution in different countries from well-defined standard employment to more flexible, individualized and **loose working relationships**. This transformation has obvious consequences for workers' rights.

Increased flexibility

It was emphasized in the majority of countries that **enterprises need increased flexibility** in the manner that they organize production and work. For example, it was indicated in Germany that companies are restructuring their work processes and corporate organization in accordance with a global framework. One solution could be greater internal flexibility (working time arrangements) and making full use of possibilities for greater external flexibility (temporary agency work, contract work and services). At the same time, decisions are being taken in a more decentralized manner and production is taking place in value networks that cross national borders. Employers in Lithuania highlighted the importance of greater flexibility in employment conditions for the creation of more jobs. In Switzerland, it is considered that entrepreneurial freedom is a prerequisite for companies to enjoy the benefits of digitalization even though, as indicated in Kenya, this will make work more uncertain. Workers in Cape Verde highlighted that increased flexibility affects not only work, but also the social fabric. However, they are not against it as long as labour rights are respected.

Reference was also made in several countries, including Germany, Kenya and Panama, to the **aspirations of many people for greater flexibility** in the time and place of work. Many workers in various parts of the world no longer regard life-long full-time employment as an aspiration. Reference was made in Panama in this respect to a "generalized market of talents", while the Netherlands referred to a "battle for talents". Markets require more flexible production and work processes. Young persons are now more independent, innovative and dependent on technology. As a consequence, countries, as noted in FYR Macedonia, are moving towards a looser form of employment relationship. The removal of physical and time restrictions will, according to a view expressed in Japan, increase flexibility and allow workers to carry out work anywhere, at any time, at their choice, taking into account their own lifestyles.

This flexibilization of the relationship between employers and employees has obvious **consequences for workers' rights and obligations**, which are addressed below.

Blurring of lines in employment relationships

Reference was made in several countries, including China, Czech Republic, Germany, Japan, Netherlands and Portugal, to substantive changes in the manner in which enterprises are organized. In China, Japan and Portugal, it was considered that enterprises will be more **project oriented** and that workers will be related to enterprises through projects. Workers will work on various projects in different companies at the same time. It was highlighted in the Netherlands that the new "project" organization will be characterized by **complementarity** between workers and machines, co-creation between employers and employees. Workers will be deployed more widely according to their skills. As indicated in Brazil, work will be carried out in multidisciplinary teams and networks. As a result, as noted in Japan, the barriers within and between companies will become more vague, and companies will be forced to change their approach of hiring full-time employees on a permanent basis. It will be important to establish a system that facilitates this type of easy movement of people, and it will be necessary for society to ensure that information on the capabilities of people and their evaluations is shared widely. Reference was made in Germany to the spread of flexible forms of project management and product development, inspired by IT. Spatial decentralization is a feature of this new organization of work. The flexible location of work may be an advantage for workers seeking to combine work and personal commitments. But, at the same time, there is a risk of the **blurring of work/life boundaries** (as indicated in Conversation 1). It is also believed in Japan that, with people working more independently, their sense of belonging to a company will weaken.

There is also a **shift of responsibility from employers to employees** for the protection of rights. For example, in Kenya, it was indicated that workers might need to take more responsibility for managing their careers, which may involve multi-skilling and multi-tasking. In Brazil, a warning was given about situations in which the employer is absent, where there is a greater need for the participation of the social partners in the new modes of the organization of work. Reference was made in Germany to the transfer of responsibilities from employers to temporary work agencies. The belief was expressed in Germany, Japan, Mauritius, Netherlands, Portugal and Spain that **the borders between dependent work and self-employment are becoming blurred**.

Self-employment and entrepreneurship: Shifting responsibilities

Self-employment and self-entrepreneurship are examples of the movement towards **more individualized** forms of employment. They have long been available as a manner of participating in the labour market. The dialogues in several developing countries, including Ghana, Guinea, Jordan, Lesotho, Pakistan, Rwanda, Seychelles and Sri Lanka, referred to self-employment and self-entrepreneurship as instruments for economic development and a **means of tackling the employment challenge**, particularly for youth. They were also described in Jordan as means of increasing women's participation in the labour market.

At the same time, the digital transformation is, as indicated in Germany and South Africa, widely expected to result in a rise in new forms of self-employed work. It was considered in Japan and France that it will become common for people to have side businesses, side jobs, or two jobs at the same time. There is also growing interest in social entrepreneurship, not only for profit, but also to solve social ills, as indicated in Uganda.

Although no clear definition of the concepts of self-employment and self-entrepreneurship is provided in the national reports, it was noted in Germany that self-employment **takes many forms**, ranging from established entrepreneurs in the high-tech sector and traditional craft businesses, to risk-taking business founders, freelancers and creative, as well as casual self-employed workers. Digitalization is also likely to lead to further variety in self-employment, from "app" programmers in the "crowd", to "on-demand" cleaners.

It was also recalled in several countries that the self-employed are deliberately excluded from many labour and social laws, and are mostly not covered by compulsory social security systems. This is a consequence of the **shift in responsibility from employers to employees** noted in several dialogues. And yet, as indicated in Germany, the self-employed are in increasing need of social protection.

Informal employment

The ultimate loose employment relationship is in the informal economy, where workers are not usually covered by legislation and escape tax-related obligations. The substantive aspects of the informal economy are a cross-cutting issue in all national dialogues. While developing countries devoted much of their discussion to this issue, more developed countries dealt with it to a lesser extent. The Government of South Africa indicated in this respect that, while the informal economy has had a redemptive role in providing relief to millions of households, its sustainability is challenged by gross decent work deficits.

3.2.3. New forms of employment[44]

Some countries described the employment structure at the national level and the measures that are being taken to address new forms of employment. For example, it was highlighted in Montenegro that a new Labour Law is being negotiated with the social partners and that in this respect, it is fundamental to examine the evolution of the employment relationship. The Government indicated that it is expected that the law will be adopted by the end of 2017 and that it will crystalize the traditional form of employment with clear contractual

relations and predefined rights and obligations. However, as indicated by the social partners, practice does not necessarily follow. The Labour Code that will come into force in 2017 in Lithuania follows a different model, as it envisages different types of employment agreements; apprenticeship, flexible working hours, project employment, workplace sharing and working for several employers.

In other countries, including Belgium, Germany, Japan, Pakistan, Portugal and Tunisia, the new forms of employment existing in the national labour market were enumerated, without indicating the specific form of work involved. These include part-time employment, fixed-term contracts, contract work (covered by civil law), seasonal and casual employment, commission based work, platforms, temporary agency work, outsourcing, zero hour contracts, vouchers, crowdwork, platform work and work under performance. Reference was also made in certain countries to working arrangements such as flexi-time and teleworking.

In this context, workers in Turkey, while recognizing that technology is changing the manner in which work is organized, highlighted that non-standard forms of employment have negative effects. Moreover, subcontractors are not considered employees and thus enjoy no security of work.

Part-time employment[45]

The number of hours worked for a job to be considered part-time varies according to national legislation. For example, in Germany, part-time employment is below 20 hours a week. The national dialogue report from the Netherlands emphasizes that the number of hours worked in the country is lower than in other countries due to factors such as the stability and dominance of the **Dutch part-time model**. The German White Paper refers to the advantages of part-time employment in reconciling work and family responsibilities. The social partners and policy-makers should strive for a new flexible compromise to enable workers to make use of working-time models based on a life-phase approach. One option would be to give parents the chance to work less when their children are young by partly offsetting the reduction in their wages. Another option could be to allow employees to work part-time for a fixed period of time with the right to subsequently return to their previous hours.

It was considered in Poland that the decrease in part-time employment is a serious problem. In contrast, the dialogue in Kenya referred to increased opportunities for part-time work. It was noted in Australia that this form of employment **does not automatically equate to underemployment** and that both the economy and personal work-life balance can benefit from part-time work.

Temporary employment

Temporary employment, rather than open-ended contracts, is becoming increasingly common. In addition to the evolution towards a project-based organization of work, as noted in Germany and Japan, it was highlighted in China that jobs will be replaced by tasks. In some countries, as indicated in Kenya, short-term freelance contracts are replacing stable full-time jobs. The workers concerned are not normally covered by existing legislation, and are therefore less protected against competition from artificial intelligence and robotics. Some employees in

Poland are increasingly considered as contractors while, as noted in Barbados, workers are in a **permanent temporary situation**. It was indicated by workers is Swaziland that fixed-term contracts should be limited in cases where the work is permanent.

Temporary agency work

Very little reference was made in the dialogues to this form of employment. It was indicated in Germany that it is widely accepted that changes in the parameters for temporary agency work and marginal employment have contributed to a strong growth in the numbers concerned by these forms of employment.

The need was indicated in several countries to regulate the operation of temporary agency work. Israel adopted legislation in 2012 to prevent temporary agencies from operating without licences, thereby evading inspection. Legislation has also been adopted in Poland on the organization of temporary employment agencies. It was considered in Germany that, while external flexibility must be possible, certain limits should be imposed, including through legislation, on the systematic transfer of business risks to temporary agency workers. Reference was made in certain countries, including Madagascar and Nigeria, to high fees and lack of regulation.

Workers in Cape Verde referred to the increased utilization of outsourcing, in the context of which workers contracts are more precarious, wages are lower and workers do not benefit from social protection. Reference was made in South Africa to labour brokering[46] as the origin of all new forms of work. It was further stated that, despite legislative amendments to regulate the private recruitment of labour, labour brokers continue to violate the law. In the national dialogue in Swaziland, the discussions focussed on labour brokering. While the employers considered that it should be regulated, the workers emphasized that labour brokering runs counter to worker protection.

Sharing economy: Platforms, gig economy, on demand and crowdwork

There were a great number of references to work through digital platforms, including the following classification in the German White Paper: (i) digital marketplaces (such as eBay); (ii) intermediary platforms (Airbnb, Uber); (iii) crowdworking platforms (Amazon); and (iv) social communication platforms (Facebook).

The belief was expressed in the Nordic dialogue that the sharing economy is not the right name for this economy due to its financial implications. The “platform” or “gig” economy would be better definitions, as they refer to the fact that digitalization allows substantially lower transaction costs in matching the supply and demand for labour.

It was noted in France that platforms have developed significantly since the 2000s. Workers wanted to earn a living or develop self-entrepreneurship during the crisis, even though this meant a reduction in their labour rights and working conditions. Since then, as highlighted in Germany, platforms have been acting as intermediaries for a whole range of services, even

those that are at low risk of automation. They operate with highly qualified workers, as well as workers performing micro-tasks or physical services on demand.

Reference was made in several countries, including Australia, Kenya, Netherlands, Poland, Saudi Arabia and Switzerland, to certain **positive aspects** of platforms. They help to tackle unemployment and create more jobs, while at the same time increase labour market flexibility. The Australian Government indicated that, while the small gig economy is expected to continue to grow and provide opportunities for flexible work, platforms are also beneficial for the customer, as they offer increased efficiency, lower prices, greater choice and easier access.

However, despite their employment potential, the working conditions in platforms, are regarded as problematic. They have created, as indicated in Germany and Switzerland, new forms of work that need to be analysed on a case-by-case basis. Some reflection has already taken place in Switzerland at the level of the Federal Council on the status of transport platforms. They no longer offer work, but "activities", as indicated in Portugal. The status of the workers, as indicated for example in the Nordic dialogue, also needs to be determined, as some crowdwork models contain elements of both self-employed and dependent work. It is difficult to determine to what extent these platforms are exploiting grey areas regarding the status of workers in order to cut costs. It was pointed out in Australia, Germany and the Nordic countries that platforms, like other new forms of employment and working arrangements, are less transparent and sometimes **conceal the true chain of responsibility.** It is necessary to identify the worker's "ultimate" employer. It was highlighted in the Netherlands and South Africa that certain forms of the sharing economy may be at odds with existing labour relations and workers' social achievements.

As highlighted in France, even though workers often seek independence when joining platforms, the relationship of subordination remains, either through a superior or an algorithm. Workers in Portugal warned that, while platforms seem to offer workers autonomy, in reality working hours expand, work invades leisure hours and employers' responsibilities are diluted. In some cases, it is not clear whether workers are acting as contractors or company employees.

Reference was made in some countries, including Australia and Kenya, to **serious decent work deficits**, including problems in the payment of wages. Other criticisms include the possibility for work to be rejected by the platform operator without any reason being given. It was highlighted in France that platforms also avoid making social security contributions. Finally, reference was made in Belgium to job insecurity, performance evaluation by external clients (implying the risk of discrimination) and the lack of career perspectives and of access to continued training.

While recognizing **the labour market challenges of platforms**, as indicated in Australia, Germany, Spain and Switzerland, it is currently difficult to predict how digital platforms, and the non-standard forms of employment involved, will develop and the extent to which they will replace standard employment, or the impact on workers and society as a whole.

It was considered in both Australia and Switzerland that the wide range of platforms and working arrangements in the gig economy make it impossible to design a single solution to

protect all workers. It was noted in Australia that it is necessary to examine whether those working in the gig economy can be considered employees and whether the gig economy should be regulated to ensure that industrial relations remain relevant in the sector.

Questions also arise regarding consumer protection and social competition. Reference was made in Germany and Switzerland to the partly overlapping and partly conflicting interests of workers and consumers in relation to digital platforms. It should also be taken into account that platforms tend to create monopolies and often foster price wars. Employers in China considered that both drivers and passengers are customers of transport platforms, while France indicated that platforms prefer to call workers and consumers "partners".

Cooperatives: A possible alternative

Cooperatives could be an interesting alternative to platforms. As indicated in Germany, they operate a little like SME crowdfunding. They could offer a suitable organizational response to the challenges posed by platforms, with the aim of providing a framework in which workers can organize and assert their interests. It was stated in Lesotho and South Africa that cooperatives are a component of the alternative economy which offer the potential for further development.

Flexi-time and teleworking

Flexible working arrangements, and particularly flexi-time, were discussed in various countries, including Barbados, Canada, Germany and Trinidad and *Tobago*. They are seen in many countries as a solution **for the reconciliation of work and family responsibilities**. Following a national consultation on flexible working arrangements, the Canadian Government indicated that it intends to amend the Labour Code to give workers in federally regulated sectors the right to request flexible working arrangements and that ways will be explored of helping workers to manage their work and personal lives better. In Trinidad and Tobago, for example, reference was made to the fact that flexi-time could enable workers with disabilities to participate in the labour market.

Telework in various forms is now an established arrangement in many companies. It was highlighted in certain countries, including Tunisia, that teleworking and home work can help reduce costs, create new jobs and offer additional wages. In its second national report Switzerland[47] referred to a national study on teleworking carried out by the Federal Council. The study concluded that there is no need to enact new legislation on this issue.

However, warnings were expressed in Germany and Ghana concerning the risks of abuse in flexi-time and the **dilution of borders between working and leisure time**. Flexi-time can result in the intensification of work and time-related stress, with an increase in people working in the evening, at night and at the weekend. For example, in Germany, 30 per cent of white-collar workers say that they work from home at least occasionally (2 per cent of manual workers) and that 12 per cent deal with work-related matters during their leisure time several times a week (4 per cent of manual workers).

3.2.4. Protection of workers' rights beyond the standard employment relationship

Tax and social protection

It was emphasized in Portugal that there can be no effective social protection for workers unless it is **provided for in the workplace**. In some countries, such as Kenya, discussions addressed the issue of social protection systems in a changing world of work. In many of these countries, only workers receiving wages (wage workers) currently contribute to health insurance and pensions, with a small minority in the informal sector making small contributions. It was indicated in Argentina and Austria that changes in the organization of work will have an impact on the source of funding of social security and that it is necessary to safeguard the social security safety net, including through (collective) participation in decision making, also in the case of new forms of employment. Reference was made in Argentina to the progressive **universalization of social security** in the country, without a specific link to a job. The national dialogue report of the Netherlands indicated that organizing social security systems that take into account the diversity of the employment relationship and provide sufficient protection and security remains a challenge. Moreover, the security system should provide a suitable interpretation of solidarity. In the Russian Federation, it was concluded that the social insurance system in the country was functioning, but that it had to be improved.

In this regard, it was considered in a large number of countries, including Argentina and Ghana, that **all workers**, including the self-employed, informal economy workers and the unemployed, **should enjoy labour protection**. The belief was expressed in China that workers at the end of supply chains, such as dispatched workers, self-employed workers and workers on part-time contracts, should be covered by basic protection.

Reference was also made in several countries to the need to ensure the payment of taxes as an important element in the financing of social security. The need was highlighted in Madagascar to ensure that all informal enterprises pay their taxes. It was suggested in Uganda that a system should be developed to monitor the allocation, quality and pay offered for jobs in platforms, for example to provide a proper basis for taxation.

Reference was made in Japan to the fact that social security institutions also need to adapt to changes in the employment relationship. Employers and employees should pay appropriate social insurance premiums, even for a single hour of work.

Protection of rights in non-standard forms of employment

Although digitalization is providing new opportunities for many workers, and facilitating the transition to formality, it was indicated in several countries, including, Belgium, Czech Republic, France, Germany, Japan, Kenya, Mauritius, the Nordic countries, Poland, Senegal and Uganda, that it also raising **challenges in relation to employment status, income and access to social protection, as well as vocational training**. The consequent fragmentation of the workplace also raises problems respecting workers' representation, freedom of association and collective bargaining, as indicated in South Africa. It was noted in Germany that the critical issues include the growing flexibility requirements of companies, involuntary part-time

work, the expectation that workers should be reachable at all times, unpaid overtime and non-compliance with rest periods in a world where the boundaries of work have broken down.

To ensure that working conditions are improved and to limit the systematic transfer of business risks to temporary agency workers, job security should be improved and legislation revised, as recalled in Belgium, Kenya, Liberia, Madagascar and Senegal.

But, as highlighted in Germany and Kenya, a reconciliation is also needed between the flexibility required by enterprises and workers' preferences. The issue is to achieve "good work" resulting from a combination of security and flexibility. In Portugal, Senegal and Sierra Leone, "flexicurity" is viewed as a solution for the reorganization of enterprises, so as to enable people to be engaged in part-time, fixed term and flexible contracts, outsourcing, subcontracting and global supply chain systems. It was indicated in Poland that the expansion of non-standard forms of employment should be limited, and particularly "non-employee" contracts regulated by civil law. Work has been ongoing in Poland since September 2016 on a Draft Labour Code which will address the issue of non-standard forms of employment and working time arrangements. It was indicated in Rwanda that the current legislation applicable to full-time employment will have to be adapted to the evolving situation in which full-time employees are replaced by contingent workers. The current legal system in Portugal allows a certain degree of flexibility to encompass many of the new labour contract models. But there is a risk that some models of employment mask false self-employment. In this regard, it was highlighted in Cape Verde that the legislation should be modified to ensure that it adapts to new forms of employment and that it affords social protection.

As indicated in Italy, the role of social protection is to support economic development within the framework of change. There is currently a situation of economic development with increased labour precarity. As indicated by the Government of Italy, in order to deal with change, public policies need to be inclusive and take into account technological innovations. In this regard, it was noted in Australia that strong health care and social welfare systems will need to be maintained to ensure an effective safety net for the growing number of people in non-standard types of work. Moreover, Australians engaged in insecure or irregular (gig) work and receiving variable incomes will probably find it more difficult to obtain mortgages. Workers emphasized that the Australian Government should consider strengthening regulations to improve rental conditions and support longer tenures. Similarly, although contract work was used in the public administration in Trinidad and Tobago, it is being progressively abandoned due to certain intrinsic disadvantages, including the challenge of accessing finance for workers on temporary contracts.

To protect workers from these dangers, and to accompany them in the transition to new forms of employment, it was suggested in France that the ILO should reflect on the possibility of rights attached directly to the person (rather than through the employment relationship) in relation to protection against occupational risks, access to vocational development and training, and individual rights (such as social protection and freedom of association). It was suggested in Belgium that new forms of work need to be inventoried as a basis for preventing discrimination and precarity. It was added in the Russian Federation that surveys should be carried out among employees and employers to find out the extent to which existing forms of work differ from those provided for in the legislation, identify loopholes and introduce the necessary changes.

In relation to platforms, the gig economy, crowdwork and on-demand work, several countries, including Australia, the Nordic countries, Poland and Switzerland, have already initiated reflection on the legislative situation to ensure that there are no legal loopholes. It was concluded in Australia that, if gig-based work becomes mainstream, a fundamental change could be required in employment legislation. The possibility was raised in Germany of taking a similar protective approach to that adopted in the Home Work Act for platform workers and certain types of crowdworkers. Innovative approaches could also be developed for the provision of old-age and other insurance for self-employed workers. The importance was highlighted in Poland of establishing appropriate conditions to address the issue without creating unnecessary obstacles to the labour market. It was considered in the Nordic countries and Switzerland that no new legislation is needed in this regard, as existing laws already provide for great flexibility. Further dialogue on this issue is needed between businesses, consumer institutions, trade unions and policy-makers.

3.3. The organization of production

3.3.1. Moving from small to big enterprise structures, or vice versa?

All the dialogues in all regions confirmed that enterprises, of all sizes and structures, are central to the economy and economic development. In many countries, the main preoccupation is to develop a **network of national enterprises**, mainly micro-, small- and medium-sized enterprises (MSMEs). These small and medium structures often offer a solution to informality (Algeria, Central American countries, Rwanda, Senegal, Seychelles, Sierra Leone, Thailand and Zimbabwe).

There is also a need to develop infrastructure. For example, it is considered in Austria that, in order to ensure that the entire economy benefits from the advantages of digitalization, SMEs should be more aware of digital development opportunities. Interconnection and cooperation between businesses in different sectors and of different sizes will be a decisive factor of success. The need was emphasized to improve connectivity in rural areas in the United Republic of Tanzania with a view to facilitating participation in new forms of organization of work.

However, there is also a movement towards **more limited structures**. In this regard, the national dialogue report of the Netherlands indicated that many businesses no longer need to operate on such a large scale as before to obtain optimum profitability. They are often part of a production chain or of horizontal networks.

It was indicated in Thailand that specific SME promotion measures should be adopted in the framework of a 20-year strategic plan, because the current strong concentration of large industries is limiting competitiveness. It was noted in Zimbabwe that enterprises will largely become fragmented and companies will break down into collaboration networks of smaller organizations, with specialization dominating. The future lies in small business. It is important to unlock the entrepreneurship potential of citizens and to promote SMEs.

3.3.2. Global supply chains

Irrespective of levels of economic development, the discussions in many countries focussed on new forms of enterprise structure that go beyond national boundaries and their impact at the national level. These new structures give rise to challenges, including the fragmentation of production, as indicated in Zimbabwe, and the transfer of technology. It was indicated in Austria, the Netherlands and Portugal, for example, that companies are no longer organized vertically. They take advantage of global supply chains and international talent to develop their growth strategies. The digital economy is increasingly becoming the centre for the redefinition of value chains and the creation of competitive advantages, with speed and scale becoming the cornerstone of the economy.

The intention was expressed in several countries, including Brazil, Mauritius, United Republic of Tanzania and Thailand, **to participate** in global supply chains, but at higher tiers of production. The Dhaka Declaration calls on Bangladesh to strive to restructure its competitive advantages based on higher productivity instead of low wages.

Increasing concerns were also expressed regarding working conditions and respect for fundamental principles and rights at work in global supply chains, as well as growing inequality. As indicated in the Netherlands, there are concerns relating to sustainability and decent work. For example, reference was made in Bangladesh to the strong bargaining power of buyers (retailers) in global supply chains, which should be accompanied by their participation in some of the costs and responsibilities. In other countries, such as Nigeria, emphasis was placed on the impact of global supply chains on local production. Reference was made in Brazil to the issue of competition with countries with less developed regulatory frameworks. International enterprises try to impose patterns of work that do not necessarily comply with Brazilian legislation. Workers in Brazil expressed concerns that global supply chains are creating two types of workers, those with and without rights, including freedom of association.

One avenue for addressing inequality and creating a more level playing field, as noted in Australia and Brazil, would be **to improve the governance of global supply chains**. The role of governments was also emphasized in formulating regulations and other policy responses to support private sector growth, while ensuring that growth is inclusive. As highlighted in the Netherlands, governance structures, such as the ILO and OECD (business and human rights principles), are very important at the global level. It was indicated in China that, as transnational corporations are playing an increasingly important role in global supply chains, they should be expected to do “due diligence” and adhere to fundamental principles and rights at work, including freedom of association, collective bargaining, the abolition of forced labour and child labour, and the elimination of discrimination at work, with a view to contributing to sustainability and decent work. In this regard, it was highlighted in South Africa that, while globalization has given companies freedom to move across the world, there is no system to ensure global governance.

3.3.3. How to ensure governance in global supply chains

More and more countries and jobs are directly and indirectly linked to global supply chains. The view was expressed in Germany that changes in markets and companies, accelerated

by digitalization and the transnationalization of value chains, have had a direct **impact on industrial relations** and raise serious **challenges for regulation and governance**. Multinational enterprises operate beyond national monitoring systems. It was indicated in India that reflection should focus on the fact that labour law is difficult to enforce beyond national borders. However, it was noted in Bangladesh that improved industrial relations based on social dialogue would improve bargaining capacity in the international arena and help the country to secure a better position in value chains. Suppliers should be able to bargain without pressure. The involvement and participation of workers is a key factor in successfully shaping tomorrow's world of work, as indicated in Germany, although this requires structural conditions and forums for such negotiations.

Although it was considered in Spain that **international framework agreements** could offer a new form of governance applicable to supranational entities, in the first dialogue of the Nordic countries it was noted that no improvement has been achieved in the celebration of transnational agreements to establish a regulatory framework for global supply chains.

3.3.4. Fear of re-shoring

The re-shoring of production from developing to developed countries was highlighted by some countries, including Belgium, Brazil and Germany, as a **logical consequence of automation** in many industries. Some developing countries fear that this will sweep away their **comparative advantage** in labour costs. For example, concerns were expressed in Viet Nam regarding the impact on the national economy of the re-shoring of companies in textiles, apparel and footwear, as well as the electronics and electrical products sectors. Numerous countries considered that the up-scaling of skills is essential to ensure that workers are able to respond to the challenges posed by new technologies (see Conversation 2).

Conversation 4: Governance of work

4.1. Towards a new governance system?

Many national dialogues referred to the need to ensure adequate governance at the international, national and enterprise levels. Work should be governed, as noted in Kenya, through **a combination of policy, legal and institutional frameworks**. But the question arises of existing and potential structures that need to be established to ensure that all measures, policies and rules adopted in future are adequately monitored and enforced. New forms of the organization of work require the adaptation of existing governance structures.

The national dialogue report in the Netherlands emphasized that current regulations and supervision are not geared to the fast-growing sharing economy or other new business models. It was indicated in Switzerland that digital transformation should not be limited by premature and unsuitable regulation, which in turn should not restrain innovation or protect or favour traditional technologies or business models. At the same time, it is possible that some legislation has become obsolete due to technological innovations and digitalization. The view was expressed in Austria that digitalization will enable citizens and businesses to benefit from efficient public administration as an effective service provider and innovator. Services should be tailor made, and time spent on bureaucratic activities will be reduced. During the discussions held by CARICOM, the Government of Trinidad and Tobago indicated that the governance of work should be understood within the framework of human rights protection. The need was also noted in several countries, including the Central American countries, Israel and the Netherlands, to create or reinforce governance structures and to ensure the coherence and effectiveness of the system as a whole. It was highlighted in Lesotho that governance of work, which depends to a large extent on policy stability, is central to achieving stable labour markets.

4.2. Ensuring governance throughout the world

4.2.1. A new national governance framework for the future of work

The need was emphasized in several countries for an overall reform of governance to **adapt to the new challenges** in the new world of work. For example, it was indicated in Austria that the trend towards increased mobility creates a need for the unrestricted availability of government services. This should be addressed through e-government solutions and the provision of public data infrastructures. It was pointed out in Kenya and Mauritius, and by employers in Panama, that legal and institutional frameworks need to be adapted to changes in the world of work, with a particular need to address issues relating to the rule of law, social security and fiscal stability. Finally, the importance was highlighted in Pakistan, Switzerland and Zimbabwe of the rule of law and trust in local institutions as a driver of national and international investment.

It was emphasized in Bangladesh that an operational and conducive institutional and regulatory regime and incentive system is required for the effective development of human capital. In Nigeria, it was noted that the relationship between work and society could be made beneficial, decent work could be secured for all, and technology, innovation and globalization could lead to a better world of work through effective legislation and the strengthening of labour market institutions.

The need was identified in Guinea to improve labour market governance, and in Namibia, reference was made to the weak institutional framework, the obsolescence of labour law and the weak enforcement system. The view was expressed in Sri Lanka that better and stronger labour market governance goes hand-in-hand with fair working conditions. And the need was emphasized in Pakistan for strong, but flexible and innovative labour institutions, trade unions and comprehensive, integrated and coherent policies. The discussion in Portugal raised the question of whether legislation, public policies and collective bargaining are following the rapid pace of market change. One solution, as indicated in Namibia, is for laws to be standardized to accommodate the challenge of globalization.

As indicated in Austria, e-government would help increase efficiency within authorities, but should also make things considerably easier for citizens and industry, and serve as a driver of innovation for the entire national economy. Changes are also affecting corporate governance, as noted in Germany. Financial investors, changing market conditions and greater volatility of demand are having a greater influence on corporate decisions. What impact will this have on the employment relationship? Greater external flexibility, involving outsourcing and temporary agency work or external crowdsourcing, need to be addressed through a new governance framework. It was noted in Germany that companies are restructuring their work processes and corporate organization in accordance with a global framework. The Minister of Labour of Trinidad and Tobago emphasized that the governance of the employment relationship is a key challenge, taking into account the new forms of employment.

In this regard, it was indicated in Uganda that improved governance of work requires the **effective implementation** of labour regulations, adherence to labour standards and social dialogue at the workplace. This would ensure better performance by workers, higher enterprise productivity and sustainable employment. A fast track could be adopted to review labour laws and regulations to improve the governance of work.

Reference was made in several developing countries to the need to **collect specific data** on the various issues since, as indicated in Barbados, "what gets measured gets attention". Emphasis was placed in Ghana, Iraq, Madagascar, Nepal, Nigeria, the Nordic countries, Pakistan, United Republic of Tanzania, Timor-Leste, Trinidad and Tobago, Rwanda, South Africa, Swaziland, Switzerland, Uganda and Zimbabwe, on the importance of collecting data on very diverse issues, ranging from labour market participation, unemployment and gender issues to informality, how to deal with globalization and the internationalization of production, and the impact of platforms on the labour market. This is critical to ensuring governance, as indicated in South Africa.

4.2.1.1. First things first: Ensuring fundamental principles and rights at work

In Madagascar, it was considered that respect for human rights is a challenge in the country. Similarly. It was recognized in other cases that **fundamental principles and rights at work** are essential to inclusive and sustainable development, as indicated in the Dhaka Declaration. It was considered in the United Republic of Tanzania that the enforcement of labour standards and fundamental principles and rights at work is key to the protection of workers' and employers' rights.

The Government of Argentina referred to the need to respect fundamental rights at work, and particularly to eliminate child labour. The need was highlighted in Rwanda to review the labour legislation, including the regulations concerning child labour and the minimum wage. In Trinidad and Tobago, discussions focussed on discriminatory hiring practices, and the susceptibility of workers on short-term contracts to political discrimination. The existence of a gender wage gap was highlighted in Tunisia, together with low salaries and different remuneration systems between regions. A call was made in Senegal for the implementation of the 1998 Declaration on Fundamental Rights and Principles at Work and the 2010 Jobs Pact. Terrible working conditions in the textile sector were highlighted as emerging issues in Uganda, and the need to strengthen freedom of association was emphasized in Mauritania. In Turkey, it was reaffirmed that industry 4.0 could not be implemented if freedom of association is not ensured in the country.

4.2.1.2. Ensuring governance through legislation

Many national dialogues, including in Indonesia, Japan, Kenya, Lesotho, Liberia, Malta, Panama, Saudi Arabia, Senegal, Spain and Swaziland, emphasized the need to update national legislation to accommodate the new world of work, increase coherence and ensure the broadest coverage. It was considered that many labour laws in Nigeria and Sierra Leone are obsolete and do not address the challenges arising out of transformation processes. Similarly, according to the Portuguese dialogue, national legislation does not cover the consequences of current changes and the increasing levels of precarity. Workers expressed concern that the future of work is providing an excuse for deregulation in Portugal. In their view, there is a need to adapt legal regimes to meet the needs of relocation, functional adaptation and changing competences. The objective is to avoid new approaches, such as 24-hour availability, which could transform work into a contemporary form of slavery. The dialogue in FYR Macedonia noted that the main instrument to mitigate this trend is a stronger legal framework, which could also assist in the development of collective bargaining.

The need was emphasized to review the legislation in Madagascar and South Africa to bring it into conformity with International Labour Standards (ILS). The discussions in Israel referred to the need to adapt the existing legislation to current labour market needs. It was also noted in Morocco that it is necessary to review national legislation to enable enterprises to adapt better to new circumstances and to make the labour market more dynamic. It was emphasized in countries such as Lesotho, Poland and United Republic of Tanzania that regulations need to ensure sufficient flexibility to avoid being a disincentive to employment. Reference was made to the rigidness of labour market rules and regulations in Trinidad and Tobago and the necessity to change labour law to create a more flexible working environment.

With respect to coverage, it was indicated in Pakistan that the legislation should be amended to cover all workers, including those in construction and agriculture, and those engaged under "third party contracts". It was added in Bangladesh that the legislation should also cover those working in Export Processing Zones (EPZs). The Government of the Dominican Republic referred to the need to adjust the national legislation, particularly to grant adequate protection to those engaged in flexible work. Regulations should be reviewed, as noted in Sri Lanka, to include the concept of a virtual workplace. It was indicated in South Africa that legislation should cover all those different forms of work where there is no clear definition of the employment relationship in order to recognize non-traditional forms of work.

The question was raised in some countries of the modification of legislation in relation to certain specific issues. For example, discussions in Sao Tome and Principe examined the need to revise the labour legislation to improve respect between employers and workers, include provisions on OSH, working time, social protection, the protection of children and combating child labour, and to establish labour courts. It was noted that legislation has been adopted in the Russian Federation in recent years which has improved the OSH situation and considerably reduced the number of injuries.[48] In Timor-Leste, reference was made to the improvement of the legal environment respecting land ownership, credit for the private sector and skills development, with a view to developing the private sector. It was indicated in Poland that it is necessary to consider the adoption of regulations on financial markets and global taxes with a view to reducing inequality.

Health and safety at work needs to evolve in the context of the transformation of the world of work. In Germany, OSH provisions, as laid down in the Safety and Health at Work Act *(Arbeitsschutzgesetz)* and its associated ordinances, play an important role in shaping specific working conditions. It was noted in Tunisia that it is necessary to strengthen the national OSH system, while in Bangladesh reference was made to the need to improve the existing legal framework for workplace safety and social dialogue. Comoros referred to the need to adopt a social security code. Similarly, the need was discussed in Lesotho to draft a general and comprehensive social security law.

4.2.1.3. The impact of the formalization of the informal economy in ensuring rights for all

Specific legislative, institutional or policy measures to formalize the informal economy were referred to in several dialogues. For example, the need was identified in Poland to address the problem of undeclared work through a holistic approach combining amendments to the Labour Code with changes in the social security and tax systems. The Nordic countries also highlighted tax concerns.

Specific programmes have been introduced in Cameroon to accompany stakeholders in the informal sector and help them organize their activities in very small enterprises through more flexible regulations and the facilitation of administrative registration (including social security) and training. Consideration is being given in Iraq to holding tripartite consultations on the establishment of an observatory to follow developments in the formal and informal labour markets, as a basis for communicating and sharing experience and activities. Reference was made in Zimbabwe to the need for policies to facilitate the transition from informality to formality. Economic and social laws and regulations need to be drafted in Tunisia to facilitate

formalization. Measures are being examined in Thailand to ensure that current laws and regulations support informal workers. In its national dialogue report, Uzbekistan indicated that it was making efforts for the formalization of informal workers.

It was observed in Rwanda that the informal economy is the fastest growing employment creator in the country, but that there is no systematic social security scheme for the workers concerned. Formalization should be promoted, according to Kenya and the Governments of the Arab States and South Africa, to ensure that all are included in the social protection frameworks available. Governments, as well as workers and employers, in Central American countries consider it important to formalize the informal economy so that enterprises effectively implement national legislation and to avoid unfair competition.

The trade unions in Ghana indicated that they are taking measures to include informal workers in trade unions, which will facilitate formalization.

4.2.1.4. Are national labour institutions fit for purpose?

The importance of labour market institutions was referred to in several countries. It was noted in the Czech Republic and Kenya that it is vital to establish **strong institutions** and measuring mechanisms that can help operationalize the various factors influencing the world of labour and wage conditions. These institutions are needed to secure a long-term improvement in the quality of life. The system should be predictable so that the social partners have a framework to discuss issues and settle conflicts. The question was raised in South Africa of whether labour market institutions are ready to respond effectively to the transformational changes in the world of work

The view was expressed in Cameroon that labour market institutions will increase the supply of decent work and promote self-employment, as well as the adequate implementation of international labour standards and labour inspection. The need was referred to in the Russian Federation to establish **effective** labour market institutions built on **tripartism**. The national dialogue in Senegal recommended the adoption of policies to reduce inequalities relating to social protection and wages, and to strengthen labour inspection and collective bargaining.

Information was provided by some dialogues on existing national institutions. For example, it was indicated in Madagascar and Pakistan that the institutions of the future are already in place (ministries, the National Commission for Labour, employment services, labour inspection, vocational training services, social security services and employment agencies, both private and public, as well as the judiciary in the case of Pakistan).

The question was raised in South Africa of whether national labour institutions, such as the National Economic Development and Labour Council (NEDLAC) and the Commission for Conciliation, Mediation and Arbitration (CCMA), are ready to respond effectively to the transformational changes in the world of work. As a young country, the hope was expressed that the necessary institutions and systems can be adapted and put in place in Timor-Leste to meet future challenges and opportunities. The country has already invested much in creating new institutions, and its national regulations and standards are in line with international agreements and norms. But, more needs to be done for their enforcement to ensure a level-playing field.

The need was emphasized for national institutions in Sao Tome and Principe to cover the whole territory. The Government of Swaziland referred to the establishment of a social security authority aimed at housing or regulating the various social security funds and insurances.

Some dialogues referred to the situation of specific national institutions. It was considered in Jordan that the **Ministry of Labour** has a role to play in establishing strategies and action plans to secure a more promising future of work in which all workers are granted decent work conditions, and where there is competition in the labour market that does not jeopardize the rights of workers. It was noted in Uganda that the law needs to be strengthened and adequately enforced, and that there should be a stand-alone Ministry of Labour. In Mauritania, reference was made to the need to strengthen the Ministry of Labour and increase the number of labour inspectors.

With regard to minimum **wages**, the workers asked how decent work could be ensured in India when minimum wages were not effectively enforced. In Uganda, it was suggested that the establishment of a minimum wage was necessary and could provide a benchmark for negotiations.

In relation to **employment services**, which are becoming increasingly digitalized, the need was emphasized in Austria to ensure that there is always a public alternative under public control operating alongside private agencies. A survey carried out in the Russian Federation found that employment services need to be improved, as people currently prefer to look for employment on their own rather than through such services. It was indicated that employment services in Poland need to be more flexible at the local and regional levels, with the "Establishment of effective labour market institutions built on tripartism (aimed at providing targeted assistance to jobseekers, ensuring collaboration between employees interested in doing a particular kind of work and employers, facilitating job placement and providing vocational training and re-training opportunities) as an additional guarantee of sustainable employment and the progressive development of labour relations". Although Comoros has recently established some relevant employment institutions, there continue to be difficulties in the implementation of policies and legislation due to the lack of human and financial resources. The need to develop semi-autonomous labour dispute institutions was highlighted in Lesotho.

With respect to **employment protection**, discussions in Mauritius focussed on the existing legislation, which is considered too permissive in relation to dismissal, and the need to establish unemployment insurance (a portable severance allowance) to recognize years of service.

4.2.1.5. Adapting to new circumstances to ensure efficacy

Some national institutions will have to be adapted to the new circumstances, according to the Government of Trinidad and Tobago. Moreover, in Zimbabwe, the low level of confidence in local institutions has hindered local and international investment. In Senegal, United Republic of Tanzania and Viet Nam, the importance was highlighted of harmonizing and updating global regional and national policies with a view to strengthening labour institutions, labour administration and labour inspection and protecting fundamental rights at work. It was indicated in South Africa that the governance system is fragmented and that there should be better collaboration and coordination among the various labour market commissions. There is a risk that current structures will not be adapted to the future of work.

The view was expressed in Japan that the only way for society as a whole to benefit from the potential advantages of technological progress is to establish new **labour policies** (see Conversation 2) in tandem with or ahead of technological innovations and changes in the structure of industry to enable workers to participate actively in the workforce to their fullest extent. Changes in the labour market are expected to increase the freedom to change jobs. The Central American countries referred to the difficulties faced in implementing labour policies effectively. The rapid pace of globalization and technological development, which has an impact on the nature of work, raises enormous pressures and challenges, as indicated in Mauritius, which require innovative approaches, strategies and policies at the national level.

It was considered in Argentina, Comoros, Lesotho, Liberia and United Republic of Tanzania that the governance of work will be improved when the implementation of labour standards is strengthened, with the establishment of effective **labour administration** and labour inspection systems. It is also necessary to establish labour tribunals. The need to reinforce labour administration to promote labour relations and fundamental principles and rights at work and prevent conflicts was highlighted in Cape Verde, Mauritania and Uganda.

In South Africa, the Government indicated that measures would be taken to strengthen the **labour administration** and inspection system in order to meet the challenges posed by the labour market and transformations in the world of work and to ensure adequate monitoring, enforcement and compliance. Reference was made in the CARICOM countries and Senegal to the need for monitoring in enterprises to ensure compliance with **legislation**. The ineffectiveness of **labour inspection** was highlighted in several countries. In Nigeria, for example, there is a need to establish an integrated inspection system. It was noted in Poland that the enforcement of legislation will be difficult, because the rising number of new enterprises has not been followed by an increase in the number of labour inspectors. Reference was made in Bangladesh to the need to improve the technical capacity of the Department of Inspection of Factories and Establishments and the Department of Labour. It was noted that Israel has increased the number of labour inspectors, including "special wage controllers", although it is still necessary to improve enforcement. In Nepal, with reference to gaps in rights at work, it was emphasized that gender-based violence and sexual harassment at the workplace remain common due to the lack of institutional capacities to monitor and enforce labour law.

In Trinidad and Tobago, it was recognized that a lack of awareness of workers' rights and labour institutions is one of the pressing challenges that the country is facing. In this regard, difficulties were highlighted in Rwanda and Trinidad and Tobago in the implementation and awareness of existing legislation and policies, as well as the role of national institutions.

4.2.1.6. Corporate Social Responsibility (CSR)

References to Corporate Social Responsibility (CSR) were made in several countries, although without providing a definition or description of its principal characteristics. CSR was considered in Spain as a possible new form of governance. In other countries, including Cameroon, Guinea, Madagascar, Mauritius, Nepal, Sierra Leone, Tunisia and Uganda, it is viewed as necessary for businesses, with the need to develop and strengthen it as a means of improving governance. It was noted in Lesotho that CSR is not regulated and that the results

are uneven among enterprises that implement it. However, as indicated by workers in Spain, CSR will never replace collective bargaining, social dialogue and national and international standards. In France, it is considered that the ILO should examine CSR and analyse the relationship between law and practice in this regard.

4.2.2. A new global framework for the future of work

4.2.2.1. The pivotal role of the ILO

The important role of the ILO in ensuring governance at the international level was highlighted in some countries, including Bangladesh, France, Mauritius, Netherlands, Poland, Switzerland and United Republic of Tanzania. The view was expressed in the United Republic of Tanzania that the ILO should bring the social partners together to keep pace with global transformations and prevent or reduce possible damage to working conditions by technology and change. A call was made in France and Poland for the ILO to improve coherence and synergies with other international organizations, particularly for the achievement of the SDGs. It was highlighted in France that the ILO should take measures to strengthen the social partners. The ILO should also develop its research capacity to provide constituents with answers and guidance. Research could cover global supply chains, the specific situation of cooperatives and workers in the informal economy, as well as social protection in relation to new forms of employment. The ILO could also participate in the elaboration of international framework agreements and act as their depositary.[49]

It was indicated in Bangladesh that compliance should not be left to market forces, and that some kind of intervention is required from governments and supranational bodies. The view was expressed in Mauritius that the ILO has numerous roles to play and a big impact at the national level. It helps to develop tripartism, assists in the formulation of policies and legislation, assists in the development of labour market information, provides technical assistance and expertise, builds the capacity of the social partners and contributes to governance at work worldwide.

It was considered in Switzerland that it is necessary to improve international coordination to deal with digital platforms, which are active at the international level, and to adopt possible measures against geoblocking.[50]

The PICs dialogue highlighted that the role of the ILO in preparation and response to disaster lies in employment protection and employment creation, promoting decent jobs and OHS standards, rebuilding livelihoods, supporting enterprises and skills' development. PICs agreed that as the way forward, the future of work priorities could be reflected in ILO Decent Work Country Programmes (DWCP), developed also in line with the Sustainable Development Goals

4.2.2.2. International Labour Standards

Very few references were made concerning the need for new instruments. It was suggested in France that a protocol should be adopted to the Declaration of Philadelphia to recall its main principles and place increased emphasis on some aspects that have been insufficiently

developed, such as: gender equality, environmental sustainability and the green economy from the viewpoint of job creation. It was further indicated in France in this respect that the ILO should play a substantive role in framing global supply chains. Workers in Spain referred to the need to adopt a new instrument on global supply chains. Moreover, the compilation work already carried out with maritime conventions that resulted in the Maritime Labour Convention, 2006, could be replicated for air transport and agriculture. The absence was highlighted in the Belgian dialogue of any standard covering the monitoring of flexibility at work.

A general reference was made in some countries, including Bangladesh, Russian Federation and Rwanda, to the ratification of ILO standards, while a specific indication was provided in other cases of the conventions that should be ratified. In some cases, emphasis was placed on the need to ratify the instruments on freedom of association and industrial relations (Mauritania and Arab States), and in others on instruments on specific issues, including private employment agencies (Nigeria), minimum wages (Poland) and groups of workers, such as migrant workers (Comoros) and domestic workers (Uganda). A call was made in Sierra Leone and Tunisia to ratify the OSH instruments.

It was considered in Mauritius that the Declaration on Fundamental Principles and Rights at Work, and the fundamental Conventions, should constitute the basis for governance at work. It was concluded in the PICs national dialogue that measures should be taken to effectively promote the realization of the fundamental principles and rights at work, increase the ratification rate and the application of fundamental labour standards.[51]

References were made in some countries, including Liberia, Madagascar and Nigeria, to the challenge of going beyond ratification and improving the implementation of standards. It was considered in Cameroon that international labour standards should be adapted to the context of each country, taking into account in particular the need to regulate the informal economy. Calls were made in some other countries, such as Armenia, Jordan and Trinidad and Tobago, for measures to be taken for the implementation of specific conventions.

The dialogue in Belgium noted that some standards are of particular importance in the context of the future of work to protect against the dangers of new forms of work, with particular reference to those on freedom of association, equality of opportunity and treatment, social policy, maternity protection, domestic workers, the employment relationship, social protection floors and the transition to the formal economy. It was also suggested in France that a discussion should be held on rights that could be linked directly to individuals and the possibility for all individuals to have access to vocational training and skills development, individual and collective rights, and social protection, independently from the employment relationship, in response to the consequences of new forms of work.

Workers in France and Pakistan emphasized that the ILO should modify its supervisory system on the application of Conventions to make it more stringent and establish linkages with economic and trade sanctions which could be imposed on countries that are in violation of ILO standards. Concern was expressed in some countries, and particularly Brazil, regarding the imposition of rules on developing countries which are not in a position to respect them.

4.2.2.3. The Standards Review Mechanism (SRM)[52]

It was noted in Belgium, with support in France, that the Standards Review Mechanism offers a good opportunity to adapt the ILO standards system to take into account the regulatory needs arising out of new forms of employment.

4.2.2.4. Regional and sub-regional systems

The dialogues provided information on the different measures adopted or proposed at the regional level in relation to the issues addressed in the conversations. In this respect, for example, the dialogue in the Czech Republic highlighted the need for the European Union to create institutions to secure economic convergence. Moreover, a debate on the European Social Pillar could be a big step in tackling poverty and securing equal opportunities within the EU. It was indicated in the national dialogue in the Netherlands that measures should be taken with respect to the free movement of persons and services at the European level. There is a need to improve implementation, as well as modify inadequate rules.

It was recalled in Germany that, from May 2018, a new single legal framework for data protection would apply in all EU Member States in the form of the European General Data Protection Regulation. The Regulation offers national legislators the option of introducing more specific provisions on employee data protection. Its main aim is to avoid a reduction in existing levels of protection and to provide greater legal certainty and clarity for employers and workers.

During the discussions held by CARICOM, participants called for regional cooperation and collaboration on key economic activities, as well as the transfer of technology. Laws in the region should be harmonized. It was noted in the Central American countries that the Network of National Training Institutes, established in 2004, is responsible for coordinating action and sharing information and resources. A call was also made for measures for the approval of training at the regional level.

4.2.2.5. Labour clauses in international trade and investment agreements

The reports on the national dialogues make almost no mention of labour clauses in international trade and investment agreements, with the exception of workers in Uganda, who expressed concern because trade agreements do not envisage the employment of local workers. Reference was made in Pakistan to several trade agreements under negotiation with other countries in the region and the need to reach deals favouring Pakistani workers. It was indicated that the Social and Economic Council of the Netherlands has issued a set of principles for the negotiation of the Transatlantic Trade and Investment Partnership with the aim of promoting social prosperity, including in emerging economies and developing countries, as well as human rights and workers' rights, the environment, democracy and the rule of law.

4.3. Building the future of work with the participation of all

4.3.1. The Importance of social dialogue[53]

Although the existence of an institutional framework is essential for governance, it is only with the participation of all relevant stakeholders, especially the tripartite social partners, that governance institutions and the measures and rules that they adopt can respond adequately to the challenges posed by the evolving and rapidly changing world of work. In this respect, workers in Argentina indicated that the Government and the social partners have a role to play in coping with employment deficits resulting from technology. In this regard, it was highlighted in the Italian national dialogue that social dialogue has a pivotal role in the administration of change, in the facilitation of transition and in the equitable distribution of social welfare. Social dialogue should be encouraged, as noted in Bangladesh, **to find solutions, build trust and improve negotiating capacities**.

A call was made in Senegal for a broad consultation process on new business models and the evolution of the employer-employee relationship with a view to the adoption of new rules that protect workers, but are also flexible. It was agreed in Panama, and by workers in Central American countries, that governments and the social partners, as well as other organizations, should hold discussions on the measures to be taken. The importance was highlighted in Namibia of consulting stakeholders before, during and after the implementation of policies. The national dialogue report of the Netherlands highlights the role of the social partners and social dialogue in helping vulnerable groups find work, as well as in overcoming challenges relating to the future of work and in ensuring decent work, even in global supply chains. In this regard, the Government of South Africa indicated that it would take measures to intensify dialogue with the social partners and all key actors in the informal economy in order to find responses to decent work deficits. The importance of the independence of the social partners, as well as the development of social dialogue, was highlighted in Swaziland. The question was raised in Lesotho of whether social dialogue can ensure better enforcement and compliance with laws and policies. A call was made for the role of the Government in social dialogue to be strengthened.

While it was also considered in Central American countries that there should be some mechanism to evaluate the efficiency of social dialogue, employers expressed the view that social dialogue is an instrument that serves to add flexibility to standards and adjust them to reality. Reference was made in both Nepal and Zimbabwe to the importance of social dialogue for social peace and the development and implementation of public policies and programmes. It was recalled that co-determination laws in Germany ensure that workers have a say in both working conditions and in business planning and decision-making. In the same sense, it was stated in the Italian national dialogue that workers' participation in the organization of work was already a reality in many enterprises. It was noted in Austria that up-to-date frameworks need to be established, including collective participation in decision-making in relation to new forms of employment. The Government of Portugal referred to the need to combine social dialogue and collective bargaining, while it was emphasized in Tunisia that social dialogue is paramount for the transition from the informal to the formal economy.

In several countries, including Comoros, Iraq, Liberia, Mauritius, PICs and Sao Tome and Principe, the need was emphasized for concrete measures to further social dialogue, which in

many cases is almost inexistent. Such measures should include, as noted in the Seychelles, awareness-raising for workers and employers on the benefits of social dialogue.

4.3.2. Social dialogue institutions: No one size fits all

The need to develop social dialogue institutions was recalled in some countries. For example, reference was made in Pakistan to the need to strengthen the National Industrial Relations Commission to promote governance at work and to expand Government services to cover workers in the informal economy. The social partners in Australia have undertaken to increase consultations and social dialogue within national structures. They indicated strong support for the continued use of the International Labour Affairs Committee (ILAC) to discuss major international labour issues. Workers in Australia also called for the promotion of broader consultation and social dialogue at the workplace level, rather than only between peak bodies and the Government. The creation was suggested in Kenya of a National Tripartite Consultative Forum (National Labour Board, and Labour Institution Act). It was emphasized that the National Tripartite Forum in Mauritius needs a statutory basis in order to promote structured and constructive dialogue. It was suggested in Mauritania that a national pact on social dialogue should be signed and that the competences of the National Committee for Social Dialogue could be extended to make it operational. Reference was made in Nigeria to the need to establish a trade union registry. The need was recalled to restructure the National Council of Labour in Madagascar. With reference to social dialogue in Turkey, while the Government indicated that measures are being taken to improve existing mechanisms, workers expressed serious concern at the social dialogue deficit in the country.

In South Africa, it was recalled that NEDLAC is the principal social dialogue structure in the country. However, the agreements reached in NEDLAC are difficult to implement due to negotiations held outside the NEDLAC framework. In Lesotho, reference was made to the need to harmonize industrial relations across different institutions.

4.3.3. Collective bargaining in the context of the future of work

Over and above any regulatory framework established by States respecting digitalization and new forms of the organization of work, the view was expressed in some countries, including Germany, Kenya and Spain, that collective bargaining is the best instrument to address the specific challenges of technology and the new world of work. The social partners need to actively explore ways of negotiating agreements covering the different aspects of digitalization, as noted in Germany, Kenya and Switzerland.

It was indicated in Spain that collective bargaining should ensure a fair transition towards a new world of work. It should improve flexibility with security, while at the same time promoting employment creation. The tendency towards individualization should be reversed, as collective bargaining places everyone in a more balanced position. While considering that all relevant issues, including the lack of adequate skills, should be addressed through collective bargaining, employers in Portugal feared that new forms of work would affect existing collective bargaining mechanisms. Some participants in the national dialogue in the Nordic countries considered that new forms of work, such as temporary agency work and

the gig economy, as well as bad public procurement practices and outsourcing, undermine collective bargaining, particularly in cleaning and mobility services.

A call was made for the renegotiation of **old collective agreements** in Senegal. Employers in Portugal noted that the challenge lies in harmonizing existing collective agreements in traditional sectors with new emerging sectors, where unions do not exist and there are no applicable collective agreements. It is not acceptable to leave **major groups aside**. It was highlighted in Switzerland and South Africa that there should be some reflection on the extension of collective agreements to new forms of employment. The fragmentation of the workplace and flexibility of time and place may create the need for a move towards more decentralized collective bargaining. It was considered in Belgium that, in view of the evolution of the organization of work, with work being more fragmented and workers geographically distant from one another, serious consideration should be given to the practical and legal implications of workers' **representation** and their right to freedom of association and collective bargaining.

The Government of Trinidad and Tobago emphasized the importance of collective bargaining covering contract workers and called for a tripartite or multipartite discussion to agree on the components of **contract labour**. In Germany, it was considered that certain self-employed workers can be covered by collective agreements, provided that they are economically dependent, in which case they are considered to be similar to employees. In contrast, the view was expressed in Belgium that agreements could address the replacement of productive investment by the **financialization** of the economy.

Different points of view were expressed concerning the **level** at which collective bargaining should take place. It was considered in Germany that collective agreements appear to be the best means of tailoring the application of statutory regulations to the situation on the ground. Issues such as frameworks for crowdwork to prevent fundamental principles and rights of work from being undermined or circumvented, minimum wages, working time, social security, pensions and taxes are best negotiated at the **workplace level**. Some considered in Poland that the deregulation of the labour market is leading to the weakening of the trade union movement, as centralized collective agreements have been replaced by enterprise agreements, including multi-establishment agreements. This could bring greater security for those in "non-employee employment" covered by civil law contracts. It was also considered in Comoros that collective bargaining should be encouraged at the enterprise level.

In contrast, the view was expressed in Australia that changes in the workplace, and the reduction in the number of workplaces, are having a negative impact on collective bargaining at the enterprise level, resulting in lower coverage of workers at that level. It was therefore suggested that **negotiation should be held at the sectoral or industry level**. A preference was expressed in Tunisia for sectoral collective agreements in the rural sector. Discussions in Montenegro turned around global collective agreements. While some consider that they overlap with labour legislation and prevent the development of branch agreements, the workers considered that they constitute the starting point for negotiations at the branch and enterprise levels. In the Arab States, the trade unions highlighted that the region is falling behind in terms of recognizing the importance of collective bargaining.

4.4. Building the future of work with all relevant stakeholders

4.4.1. Tripartism in a brave new world

Tripartism is considered in many countries to be paramount for social dialogue. For example, reference was made in Cameroon to **tripartism as the basic floor for governance**. It was noted in Mauritius that tripartism should be further strengthened to ensure that the social partners can play their role in all aspects of the world of work. It is also necessary to establish a mechanism for the recognition of trade unions.

The important role of workers and employers was reaffirmed in Central American countries and in Kenya. It was added in Hungary that the social partners play a major role in coordinating efforts to achieve results and in raising awareness of the negative effects of all forms of illegal employment.

It was noted in Japan that given the expansion of new types of self-employed workers including those in platforms and in the sharing economy, it would be appropriate to explore new mechanisms to represent workers' voices. For example, advances in ICT allows for a creation of loosely organized groups such as a network of the self-employed and independent contractors who can exchange and share information through internet platforms. During the discussions in South Africa and Trinidad and Tobago, it was considered that the role of trade unions should evolve and that they need to be more connected with the workers they represent, including short-term contract workers and workers in the informal economy. In Pakistan, it was considered that the social partners should aim for economic development. It was recalled in Rwanda that the traditional **role of trade unions** is to participate in the formulation and protection of workers' rights. There should therefore be more dialogue between employers and workers to build consensus on employment issues in the future.

It was suggested in France that, to remain relevant, the social partners should take into account the needs of other stakeholders, including actors in the social economy (cooperatives), SMEs and the informal economy. In this regard, in the Nordic dialogue, there was broad consensus among all the tripartite partners, as well as researchers, that the current organization of workers and employers does not include all labour market segments and does not reach out to platform economies. Trade union representatives and researchers alike called for more innovation in ensuring "voice", participation and representation for all involved in the labour market, including through the use of IT (and platforms) to organize and raise awareness. Employers in Cape Verde and Sri Lanka said that the tripartite constituents need to take **civil society** into account.

Worker representatives in Sri Lanka highlighted the need to reconsider and review the **roles** of all stakeholders, including governments and the ILO. In this regard, it was emphasized in South Africa by the trade unions that they need to adapt to new workplace and societal changes to respond adequately to the challenges that are arising and to remain relevant. The question was even discussed in South Africa of whether the social partners, as they currently exist, will be needed in future. Similarly, reference was made in Cape Verde and Lesotho to the inefficiencies of trade unions. At the same time, the need to ensure their freedom and fundamental rights was highlighted. The view was expressed in the Russian Federation that it is necessary to examine whether industrial relations between employees and employers

have changed and to assess the extent and nature of such changes. In this respect, it was considered in Japan that, as a consequence of the dilution of the employment relationship and its replacement by a project management approach within enterprises, workers are likely to share a stronger feeling of working in the same job or field of expertise, where they would probably build virtual communities. For this reason, unions would be required to evolve from organizations based on a company or industry into new organizations to be differentiated by the type of job or region. Workers in Australia referred to the fragmentation of the workplace, which creates outreach problems for unions, as there is no official workplace where both the employer and employee are present. Unions might therefore have to reconsider how they represent workers in the changing landscape of workplaces across the world. It was noted in Spain that these new forms of work and employment would weaken the role of the social partners.

The need to change **perceptions of trade unions** was also pointed out in Nigeria. Reference was made in some countries, such as Brazil, Namibia, Poland and Sudan, to the fall in trade union membership (between 5 and 10 per cent in Namibia). It was highlighted in Madagascar that social dialogue should be strengthened and that the rate of unionization, in particular of rural workers (the majority), needs to improve. Reference was also made in Namibia to the low level of cooperation between employers and trade unions and the proliferation of trade unions and employers' organizations. One way to improve collective bargaining coverage, as noted in Germany, could be to create incentives for membership of employers' associations and trade unions, as a means of broadening the legitimacy of collective agreements.

The need was noted in Namibia and Uganda to strengthen unions, which are of limited effectiveness because of their lack of skills in the relevant fields. In this regard, it was noted in the Russian Federation that the **development of trade unions and employers' organizations** could be achieved through their greater involvement in the discussion of planned changes in public policies addressing the labour market. In the post-crisis situation in Yemen, the representative from the Trade Unions highlighted that the fragility and political divisions are weakening the workers' organizations at both national and sub-national levels.

Some dialogues addressed the issue of representativity. For example, in Tunisia it was noted that, taking into account recent developments in the country, which have led to a new social contract, it was necessary to establish representativity criteria. It was highlighted in South Africa that technology improved connection among businesses and facilitated their organization.

It was recognized by all representatives in Australia that there is a global tension between the declining numbers of worker and employer group members and the increasing breadth of membership. However, they agreed that the ILO's distinctive and unique tripartite structure is its key strength. The social partners must ensure that they remain relevant and representative to preserve the essence of the ILO. The Australian Chamber of Commerce and Industry (ACCI) noted that its membership has expanded rapidly, including peer-to-peer platforms such as Uber. The ACCI observed that this comes with its own challenges, such as internal governance delays. There is a need to convince employers of the relevance of representative bodies and the benefits of membership. The ACCI is concentrating on improving its capacity to represent a wider range of members, and noted the importance of the ILO maintaining a similar focus. The ACCI added that the gig economy demonstrates that

Australians are engaging with the labour market in more than one way. Organizations may also have to consider their representational role, as many Australians will not have full-time ongoing careers with one company at a time. Employers in Turkey indicated that employers' organizations should protect the interests of SMEs and consolidate their relations with other employers' organizations and multi-national companies. Employers' organizations should offer support to their members in such areas as international technical and social standards, social responsibility, ethical rules and human resources management.

4.4.2. Tripartism plus?

While recognizing the importance of tripartism, the discussions in several countries examined the possibility of widening the scope of social dialogue in order to ensure that all relevant stakeholders participate in discussions which affect them. For example, the **traditional tripartite approach** was questioned in the United Republic of Tanzania, with the suggestion that a move towards collaboration between the social partners, governments and other stakeholders (tripartite plus) is critical to ensuring effective governance of work. It was recalled in Poland that the future of work creates challenges for all labour market participants. For that reason, **all relevant stakeholders**, including academia and international institutions, should be included in reflection on this subject. The discussions held in Kenya pointed to the need to review social dialogue institutions to **enhance participation and bring other stakeholders of new society to the negotiation table**. It was indicated in Rwanda that the Government needs to collaborate with all stakeholders to address issues related to productivity, earnings and skills mismatches. It was noted in South Africa that emerging social formations in the informal economy are making efforts to engage with trade unions. The question is how the two will function in relation to each other. Community-based organizations, such as residents' associations, shack dwellers' organizations and civic organizations, play a critical social role, but are not adequately recognized. They should be accorded representation in NEDLAC.

The view was expressed in Spain that dialogue should include multinational enterprises. In Kenya, it was considered that other actors could play a role in social dialogue, particularly for the protection of the fundamental rights of migrant workers and workers in the informal economy and rural sector. Workers in Portugal called for the social partners and other civil actors to reflect and meet the challenges that lie ahead. There is a need for open dialogue on concepts such as "employee", "company" and "employer" to reach consensus on the scope of the employment relationship in a framework of new formulas. It was noted in Australia that several multinational enterprises, as well as civil action groups, have been seeking representation in the ILO outside the Employer and Worker groups. However, as indicated in Turkey, their role should be limited to observers, rather than official representatives.

It was noted in Germany that representative structures would continue to be necessary, but that there is also a growing need for mechanisms for the participation of individuals in organizations. The institutions of co-determination, workers' participation and a good corporate and management culture are not contradictory, but complementary. With regard to the widening of the scope of social dialogue, employers in Turkey referred to the need to adapt to new circumstances. Workers in Turkey indicated their agreement with the participation of other relevant stakeholders, such as NGOs. However, their roles have to be adequately defined, as they do not coincide with those of trade unions.

Notes

Introduction

1 The seven centenary initiatives are: the Future of Work Initiative, the End of Poverty Initiative, the Women at Work Initiative, the Green Initiative, the Standards Initiative, the Enterprises Initiative and the Governance Initiative.

2 ILO, 2015: *The future of work centenary initiative*, Report I, International Labour Conference, 104th Session www.ilo.org/wcmsp5/groups/public/@ed.../wcms_369026.pdf

3 The Nordic countries, namely Denmark, Finland, Iceland, Norway and Sweden (including also the Associated Territories of Greenland, the Faroe Islands and the Aland Islands), have a plan to implement national dialogues with the participation of tripartite delegations from all the Nordic countries as follows: in 2016 in Finland (integrated in this report), in 2017 in Norway (integrated in this report), in 2018 in Sweden and in 2019 in Iceland.

4 The letter underlined the following items as "top-lines themes of interest" on Future of Work issues: adequate benefit coverage, data transparency, training and workforce development, and enforcement of basic standards

5 Through a national development plan, white paper, digital roadmap, etc.

6 The Danish Government's disruption Committee

7 https://www.bakom.admin.ch/bakom/en/homepage/digital-switzerland-and-internet/strategie-digitale-schweiz.html

8 Japan has held two national dialogues. The first one took a "futuristic view" in the discussion on the future of work, while the second national dialogue addressed the issues in a Labour Policy Forum.

9 A table is available upon request highlighting the issues addressed in the national dialogues.

Drivers of change

10 ILO (2015): The future of work centenary initiative, op. cit.; and the Inception report (forthcoming)

11 The German White Paper is considered to be a national dialogue on the future of work.

12 See section 2.4.2 Youth

Conversation 1: Work and Society

13 http://basicincome.org/basic-income/

14 According to the OECD presentation in the national dialogue in Portugal, it is necessary to rethink policies and institutions so as to guarantee minimum social protection to all workers, irrespective of the type of activity they perform, whether they are working as employees, self-employed or independent workers. This is particularly the case for young people, who are experiencing a longer and more complex period of transition, with longer periods before finding a job, non-standard forms of employment and the lack of social protection between jobs.

15 First page: Countries that contributed to the ILO's Future of Work Initiative by level of development (by ODA list).

16 The dialogue in the Arab countries included Iraq, Jordan, Lebanon, Oman, and Yemen. Plus Egypt. These countries met tripartite conditions. However other countries including Bahrain, Kuwait, Qatar, Saudi Arabia, Syrian Arab Republic and United Arab Emirates also sent non-tripartite delegations.

17 The Arab States dialogue made mention to the following IMF 2016 information: Middle East/North Africa (MENA) countries have accounted for 40 per cent of conflict-related deaths since 1946 and 75 per cent of refugees.

18 The informal economy is a cross-cutting issue addressed throughout the four conversations from different viewpoints.

19 See CARICOM countries in the first page: Countries that contributed to the ILO's Future of Work Initiative by level of development (by ODA list).

20 It was noted in the dialogue in South Africa that 33.6 per cent of all employed persons in the country in 2016 were living in extreme poverty, with almost 230 million people living in extreme or moderate poverty.

21 Argentina held four national dialogues on the Future of Work.

22 The Nordic model refers to the economic and social policies common to the Nordic countries, which include a combination of free market capitalism, a comprehensive welfare state and collective bargaining at the national level.

23 It is worth noting in this regard that the Swedish Government has launched "the global deal" with the objective of jointly addressing the challenges in the global labour market and enabling all people to benefit from globalization: www.theglobaldeal.com/app/uploads/2017/02/Global-Deal-flyer.pdf. Using the "Nordic model" as an example, solutions for the future can be found for other economies.

24 See the Treaty of Maastricht (Treaty on European Union, 1992)

25 http://blue.lim.ilo.org/cariblex/pdfs/ILO_dec_philadelphia.pdf

26 See also Conversation 3

27 The labour force participation rate for Jordanian nationals over the age of 15 is 36.7 per cent (60 per cent for men, and only 13.3 per cent for women).

28 Linear motors are electric induction motors that produce motion in a straight line, rather than through rotational motion.

Conversation 2: Decent jobs for all

29 http://www.ilo.org/global/topics/decent-work/lang--en/index.htm

30 Full employment, in macroeconomics, is the level of employment where there is no cyclical or deficient-demand unemployment. It is defined by the majority of mainstream economists as being an acceptable level of unemployment somewhere above 0 per cent.

31 See Conversation 4.

32 The national dialogue of the Russian Federation explains that the humanization of the world of work in a broad sense sug-

gests an opportunity for personal fulfilment and provides for taking social-policy measures into consideration when working out economic and financial development strategies.

33 See 3.2.2

34 Informal economy issues are addressed from different angles in almost all national dialogues. The issue is therefore reflected throughout this report.

35 ILO, 2017: *Work in a changing climate: The Green Initiative*, Report of the Director-General, Report I, International Labour Conference, 106th Session.

36 The Blue Economy addresses the problems of resource scarcity and waste disposal, while delivering sustainable development that enhances human welfare in a holistic manner.

37 Reference was made in the dialogue in Jordan to a study by the World Economic Forum on the future of work, which predicts that 5.1 million jobs are expected to be lost by 2020 due to artificial intelligence, robots, nanotechnology and other socio-economic factors, but that these changes are also expected to create around 2.1 million jobs worldwide (the majority specialized and related to the fields of IT, mathematics and engineering).

38 Technical and vocational education and training (TVET).

39 For additional information see: http://www.lavoro.gov.it/stampa-e-media/campagne/Pagine/imparare-lavorando-In-Italia-si-puo.aspx

40 See Introduction footnote 4.

41 See also Conversation 4.

42 See also Conversation 4.

Conversation 3: Organization of work and production

43 Umbrella employment is something between being employed and being self-employed. It is something similar to what is known in Germany, the Russian Federation and the United States as "professional employer organization" or "employee leasing".

44 The classification of non-standard forms of employment agreed during the 2015 Meeting of Experts on Non-Standard Forms of Employment includes: (1) temporary employment; (2) part-time work; (3) temporary agency work and other forms of employment involving multiple parties; and (4) disguised employment relationships and dependent self-employment.

45 On-call work including zero hour contracts is included in part-time arrangements.

46 Labour brokering is a form of outsourcing practiced in South Africa (and formerly in Namibia, where it was known as "labour hire") under which companies contract labour brokers to provide casual labour.

47 Three national reports have been prepared by Switzerland to inform the national dialogue.

Conversation 4: Governance of work

48 Federal Law No. 426-03 of 29 December 2013.

49 The national dialogue report from France also referred to other issues concerning the internal governance of the ILO.

50 **Geoblocking** is a form of technological protection measure through which access to Internet content is restricted based on the user's geographical location.

51 See Bali Declaration: http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_537445.pdf

52 For a definition and description of the Standards Review Mechanism (SRM), see the Standards Initiative. It should be noted that at its 329th Session in March 2017, the ILO Governing Body took note of the regulatory gaps identified by the Tripartite Working Group (TWG) of the SRM relating to apprenticeship and shift work, which are both extremely relevant to reflexion on the future of work. At its next meeting in September 2017, 19 OSH instruments will be reviewed by the SRM TWG.

53 It was indicated in Germany and Switzerland that, as they have permanent social dialogue, the issue would not be addressed in their national dialogue reports.

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