Monitoring the impact of the COVID-19 pandemic on employment in the G20

Second ILO-OECD report to respond to the G20 Leaders' mandate

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Contents

Executive Summary

The COVID-19 pandemic has posed an unprecedented challenge to G20 economies, materialising a widening divergence between and within advanced and emerging economies. A year and a half into the crisis, labour markets experienced some recovery thanks to exceptional measures taken by governments to mitigate the shock by expanding social protection and income support, as well as the rapid rise of teleworking. Yet, the aggregate hours worked in G20 countries are still 3.6 percent lower than the pre-crisis level (fourth quarter of 2019) as of the third quarter of 2021 and the G20 employment rate is projected to reach 55.5 percent, falling short of the 2019 level of 57.1 percent even at the end of 2021.

At the same time, there is significant cross-country and within-country heterogeneity in the impact of the pandemic on labour markets. While some governments subsidised reduced hours through job retention schemes to absorb the shock, other countries expanded unemployment benefits, which resulted in strikingly different dynamics of unemployment rates. Moreover, evidence reveals that workers in the informal sector fared systematically worse than those in the formal sector, with employment reductions 3 to 6 times larger for the former than the latter, e.g. Argentina, South Africa and Mexico. Furthermore, the deeply sectoral nature of the crisis has contributed to the dangerous divergence where workers of a low level of education, low-paying occupations, young age and temporary contracts are disproportionately affected and struggle to benefit from recovery. The decline in hours worked by young workers is far more severe, which could bear damaging implications for the recovery among youth.

G20 countries increased their efforts to mitigate adverse impacts on *jobs*. Job retention (JR) schemes, which covered 20 percent of employment in G20 countries at the peak of the crisis, were widely used to prevent the number of job losses from soaring. Scaling back these schemes should be implemented carefully and flexibly in response to health situations and restrictions while avoiding maintaining unviable jobs. In addition to securing jobs, creating new jobs through temporary and targeted hiring subsidies could support the recovery by incentivising workers' mobility from JR schemes to other jobs (as in Australia, France, Italy and the UK). On the other hand, reducing the risk of infection in the workforce remains of paramount importance. Teleworking advanced flexible working arrangements but, to achieve its full potential, companies should promote its use, notably among those less likely to request it (e.g. male and junior-level staff) while ensuring a healthy work-life balance. A national framework of occupation safety and health (OSH) risks which could reflect new work practices and enable social dialogue is much needed to support safe and healthy working environments in times of the pandemic.

The extent of *income support* demonstrated by G20 economies at the early state of the crisis was also substantial, such as waiving minimum contribution requirements and extending the qualification period. As a result, the real household gross disposable income *grew* in the advanced G20 countries in 2019 and 2020. In countries like Argentina, Brazil and India, income support was extended to informal workers as well. Alongside income support, workers providing unpaid care for those in need were able to receive support (e.g. Australia's free childcare, the United Kingdom's care allowance, France's special paid leaves for those inaccessible to childcare facilities). Some countries even accelerated reforms to expand paternity leave provisions. However, more efforts are needed to establish a support structure to allow both working women and men to equitably benefit from care leave policies.

On the path to recovery, G20 countries are shifting from short-term crisis responses to more medium-to-long-term strategies. The recovery process is a unique opportunity to address challenges caused by digitalisation and automation as well as other challenges exposed by the pandemic to ensure a job-rich and broad-based recovery. . The COVID-19 crisis provided a new impulse for G20 countries to implement innovative approaches to active labour market policies (ALMPs), increasing the spending on public employment services and reinforcing online and offline training programmes for upskilling and reskilling those at risk of displacement. Meanwhile, it is crucial that ALMPs be flexible and responsive to the needs of vulnerable groups to realise inclusive recovery. These groups are often left out of the scope of ALMPs and there is a real risk that the COVID-19 crisis will durably exacerbate the dangerous divergence. For the same reason, addressing gaps in social protection for part-time, temporary and self-employed workers should be also a priority. These policy considerations should be the key to crystallise more inclusive and resilient labour markets.

1. Introduction

The rapid spread of COVID-19 developed into a global health crisis, endangering lives and livelihoods of billions of workers across the globe. On 26 March 2020, the G20 leaders held a summit to commit to "whatever it takes to overcome the pandemic" and mandated the ILO and OECD to follow up on the unprecedented impact of the pandemic on jobs. Thus, this second ILO-OECD report takes stock of the impact of the pandemic and the nascent recovery (Section 2); highlights the unprecedented policy measures taken by G20 economies to alleviate shocks to labour markets (Section 3); and presents key policy options to build back labour markets that are safer, fairer, more sustainable and resilient (Section 4).

Taking stock of the recovery (section 2) presents a status update on the ongoing recovery seen in G20 labour markets. The total hours worked by workers in G20 economies are still 3.6 percent lower than the pre-pandemic level. G20's employment rate is not expected to fully bounce back to the 2019 level of 57.1 percent and instead to reach only 55.5 percent at the end of 2021. Shocks to the labour market were mitigated and shaped by policy responses to curb the spread of caseloads. Informal workers, particularly women, were severely affected by such measures and experienced more job losses than those in the formal sector. As more housework and care were needed due to deteriorating health situations and tightening government restrictions, many workers withdrew from the labour market and became inactive in job search. Meanwhile, the rapid rise of teleworking, the use of which doubled from 2019 to 2020 to reach more than a third of employees in the G20 advanced economies, enabled to sustain millions of jobs. Teleworking is here to stay beyond the crisis but some of its side effects emerged (e.g. burnout, the right to privacy), with which regulations followed up. Overall, the governments of G20 countries managed to protect household income through exceptionally generous income support, but some vulnerable workers (the low educated, the low paid, workers on non-standard contracts and youth) are still at the significant risk of being left behind.

Policies to consolidate and strengthen the recovery (section 3) gives an overview of policies adopted by G20 countries to navigate the crisis and the course of recovery, which are classified along three pillars. Firstly, G20 countries implemented a series of measures to reduce workers' exposure to the virus in the workplace. The expansion and consolidation of teleworking requires social partners to overhaul work organisation beyond the crisis while at the same time set regulations that facilitates equal access and protects work-life balance. Some G20 governments also adopted new measures to reduce the spread of the virus in the workplace, which invoked the necessity to have a strong national occupational safety and health framework and an effective labour inspection system to ensure safe working conditions. Secondly, G20 economies sought to secure jobs, save companies and maintain essential service provision. While job retention schemes succeeded in sustaining employment, a careful balancing act to support hard hit sectors without encouraging unviable jobs to survive is a challenge in scaling them back. Providing subsidies to incentivise workers to move to new jobs and adjusting minimum wages for often female-dominated and low-paid sectors could help smooth such transition. Lastly, the extensive income and employment support were adopted to absorb shocks to affected workers. G20 countries should take this opportunity to further enhance social protection systems by comprehensively covering all types of workers, reforming parental leave schemes, providing support for workers who must tend to those in need of care and expanding active labour market policies (ALMPs).

Moving beyond the pandemic (section 4) sets out key policy considerations in view of the ongoing recovery: i) investing in job-rich economic transformation; ii) investing in effective skills policies; iii) investing in the infrastructure of activation systems; and iv) investing in reducing gaps in social protection. Given that the pandemic accelerated the pre-existing megatrends of automation and offshoring, promoting productive jobs with the help targeted ALMPs and fiscal/industrial policies is critical to smooth the necessary reallocations in the labour market and accompany the ongoing economic transformation. Quality upskilling and reskilling schemes are also vital to allow workers having access to more productive jobs and should be targeted at vulnerable groups as the pandemic could further widen inequality and prevent them from staying connected to the labour market. However, building an infrastructure to ensure quality employment and training requires medium-to-long planning. As part-timers, temporary employees and self-employed are often out of the scope of ALMPs, tackling gaps in the access to employment support should be a priority.

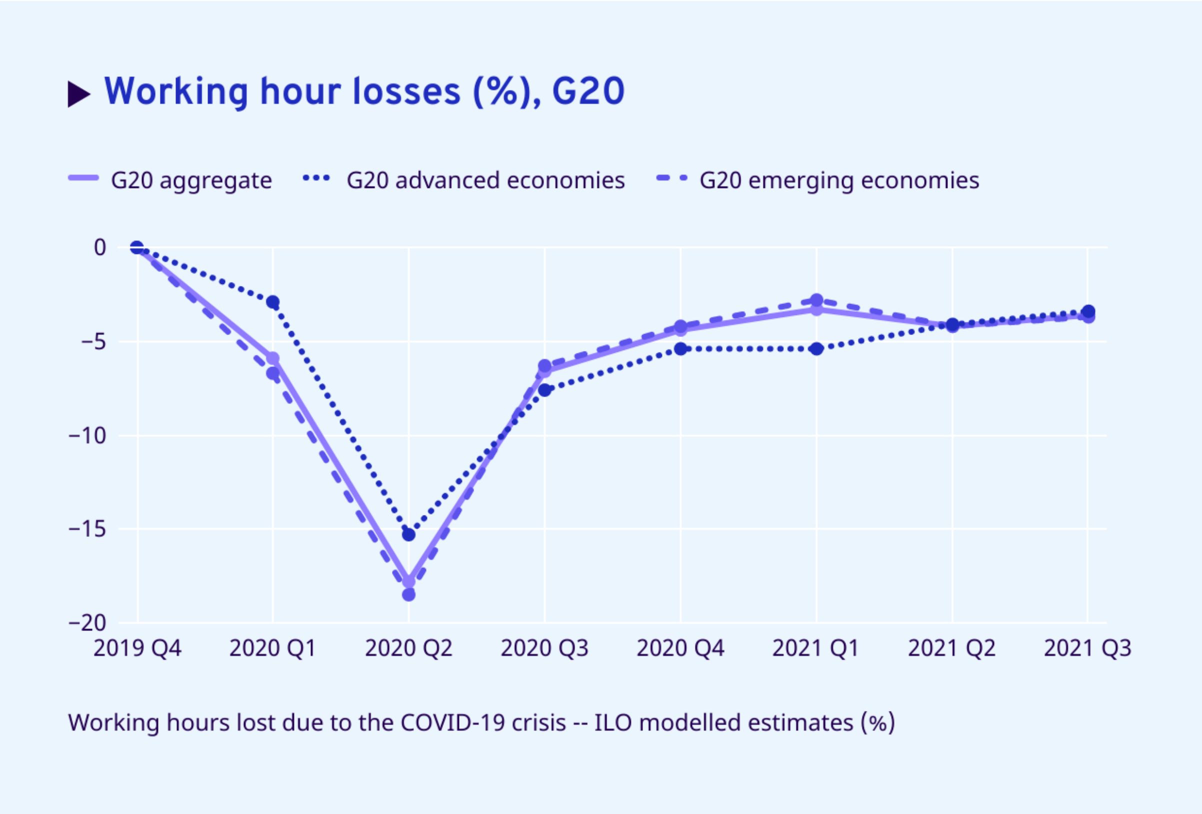
2. Taking stock of the recovery

A year and a half into the COVID-19 pandemic, the global economic outlook is improving in some parts of the world. But the "dangerous divergence" between advanced economies and many emerging and developing countries is materializing and makes the global recovery fragile (OECD, May 2021; IMF July 2021,(ILO, 2021a)). This section will document how far along G20 economies are in the labour market recovery and which part they need to play so that recovery becomes more inclusive and global. A focus will be put on identifying those groups who have borne the brunt of the crisis and where there may be a need for more sustained support.

Hours worked have only partially recovered in G20 economies

The combined effect of the crisis on the labour market (in terms of both job losses and reduction of working hours for those who remained in employment) is best reflected by the estimates of working-hour losses, which declined by 17.2 per cent in the second quarter of 2020 (relative to the fourth quarter of 2019, seasonally adjusted). Following this trough, working-hour losses recovered somewhat but remained at a deficit of 3.6 per cent in the third quarter of 2021 (Figure 1).

Figure 1. Aggregate G20 working-hour losses, relative to fourth quarter of 2019 (per cent)



Source: ILOSTAT, modelled estimates.

A year and a half after the onset of the crisis, hours worked are still below pre-crisis levels. While there were differences in working-hour losses between the G20 emerging economies and the advanced economies in the first year of the pandemic, the average speed of recovery has stalled and converged across all G20 economies in the spring of 2021. Yet, the recovery of labour markets is heterogeneous across countries. Most notably China is projected to return to annual working hours above pre-pandemic levels at 0.4 percent in 2021, with France following closely at projected -0.7 percent changes in working hours in 2021. In other countries hours worked are projected to remain further below the level of 2019, e.g. Argentina (-8.9 percent), India (-7.2 percent) and South Africa (-10 percent). (ILO, 2021x)

Employment rates are now about half way into recovery in most countries

From 2019 to 2020, the employment-to-population ratio fell by 2.6 percentage points (from 57.1 to 54.5 percent) across the G20, and is estimated to return to just 55.5 percent in 2021, which represents a significant gap on the pre-crisis level (1.6 points, Figure 2). At the same time, the inactivity rate increased from 39.6 percent in 2019 to 41.7 percent in 2020, and will remain above the pre-crisis mark in 2021. Reflecting that more of the employment losses were translated into inactivity, the unemployment rate increase from 5.5 to 6.7 percent and is expected to fall back to 6.3 percent in mid-2021 (Figure 2).

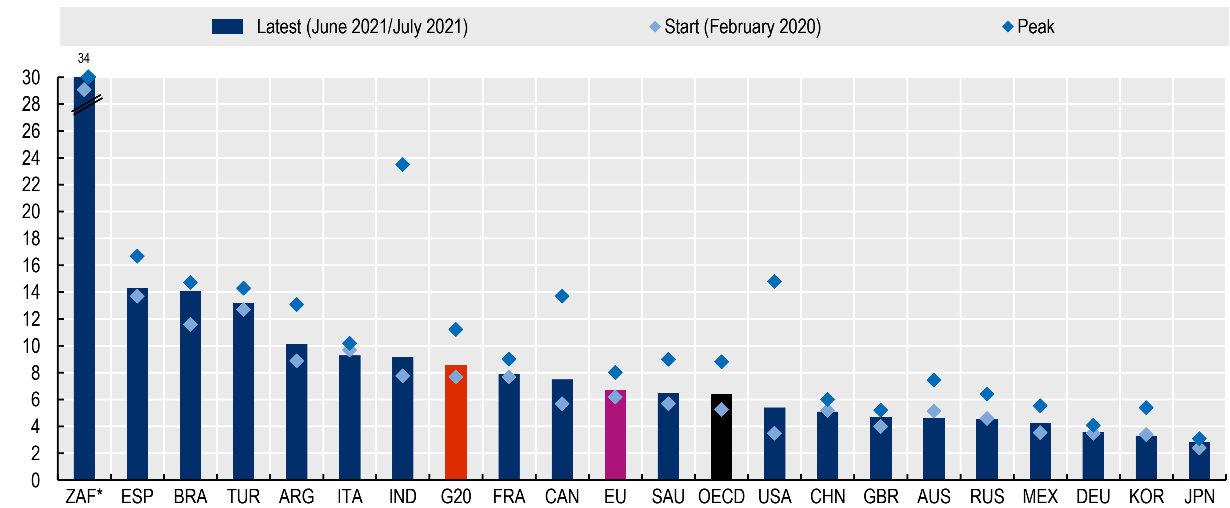
Figure 2. Aggregate G20 trends for employment, unemployment and inactivity

Source: ILOSTAT, modelled estimates

In terms of gender differences, the female employment-to-population ratio declined from 2019 to 2020 by 2.3 percentage points compared with a fall of 3 points for men. However, the relative decline for women was greater given the lower starting point in 2019 (an employment-to-population ratio of 44.3 percent versus 69.8 percent for men).

Figure 3 Unemployment, pre-crisis, peak, most recent

Percent of labour force, seasonally adjusted



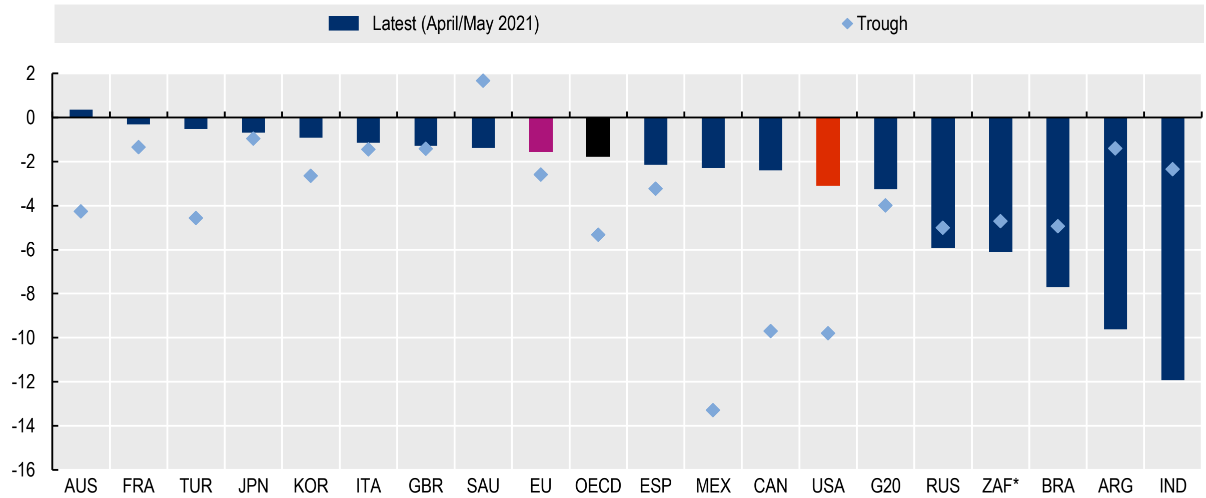
Note: Peak: highest level reached since February 2020. Latest available data other than June or July 2021: November 2020: Norway and May 2021 for Chile, Costa Rica, India, Turkey and the United Kingdom. Quarterly data for Argentina, Brazil, Saudi Arabia and South Africa: starting date in 2019 Q4 and latest 2021 Q1 or 2021 Q2. Data for non-OECD countries are not seasonally adjusted. *Population aged 15-64 for South Africa.
Source: OECD Short-term labour market statistics and National LFS data.

The unprecedented impact of the crisis on the labour market was shaped, in large part, by policy, generating large country differences. While widespread temporary layoffs swelled unemployment numbers in some countries like in the United States and Canada, driving unemployment rates dramatically during the initial phase of the crisis, elsewhere publicly subsidised reductions in working time often absorbed much of the slack (Figure 3). Indeed, across the OECD, close to three-quarters of the decline in hours worked was accounted for by some form of reduced working time among those who remained in employment (OECD, 2021). As a result, as of April/May 2021, the impact on employment remained below 5 percentage points in most G20 countries (Figure 4) except India, Argentina, Brazil, South Africa and Russia.

Employment rates are now about half way into recovery in most countries, but remain still 3 percentage points below the level of February 2020 in the G20. Employment rates remain particularly low in Chile and in Colombia, where they are still more than 5 percentage points below pre-pandemic levels, while they fully recovered in a few countries, including Australia and Turkey. In a few countries, however, the trough of the employment slump was attained only in the early months of 2021.

Figure 4. Employment rates: changes from pre-crisis levels: trough and most recent

Percentage ratio of employment to population 15+, percentage point change since February 2020



Note: Trough: lowest level of the employment rate reached since February 2020. Latest available data other than April or May 2021: November 2020: Norway; March 2021: Chile and the United Kingdom. Quarterly data for Argentina, Saudi Arabia and South Africa: starting date in 2019 Q4 and latest 2021 Q1 or 2021 Q2 * South Africa: persons aged 15-64.

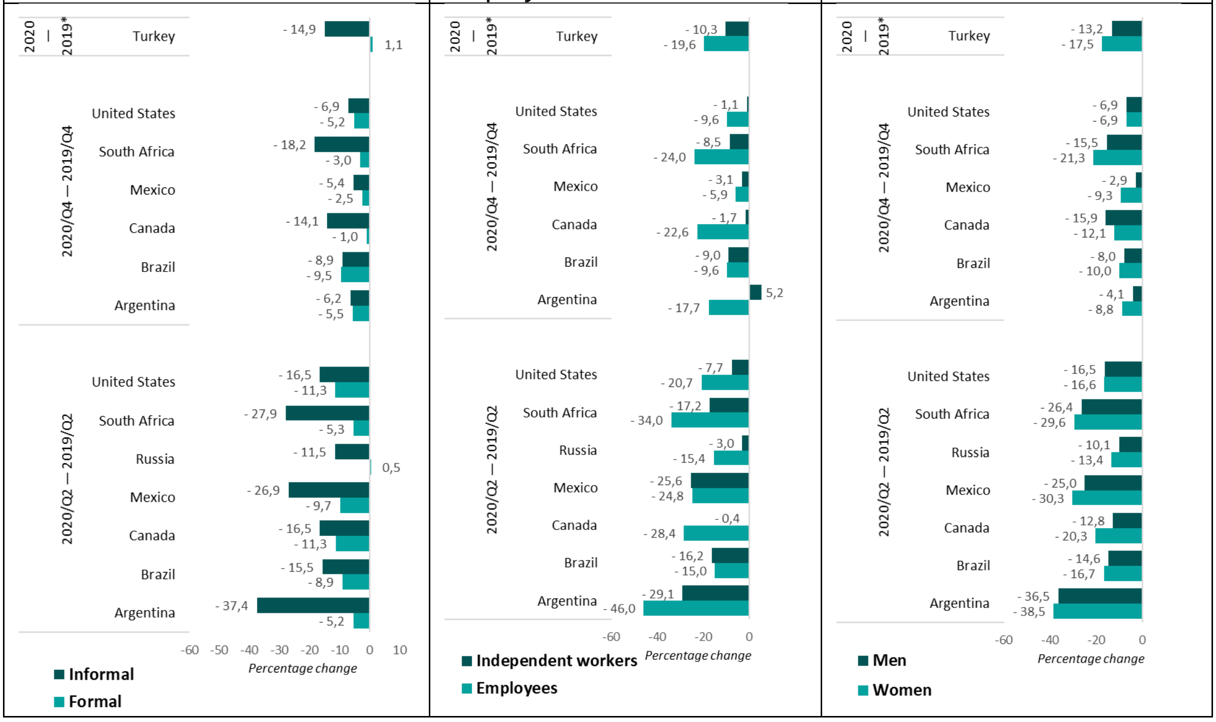
Source: LFS Monthly data for Australia, Canada, Chile, Colombia, India, Israel, Japan, Republic of Korea, Russia and the United States. Quarterly data for Argentina, Brazil, Saudi Arabia and South Africa,. For the other countries, statistics shown in this Table refer to OECD estimates based on the OECD Monthly unemployment data and the quarterly working-age population aged 15 and over from the LFS. Population in 2021 has been projected with 2020 growth rate in population (aged 15 and over).

Informality is swelling

Data from eight G20 countries show that in the 2nd quarter of 2020, a peak period of lockdown in most parts of the world, informal economy workers were more likely to lose their employment compared to workers in the formal economy (Figure 5)[1]. The drop in the number of informal economy workers ranges from 11.5 percent in Russia to 37.4 percent in Argentina while the decrease is systematically lower for workers in formal employment (Figure 5, Panel A). In the 4th quarter of 2020, the drop in informal employment was smaller in all eight countries, although still large (from 5.4 percent in Mexico to 18.2 percent in South Africa) and systematically higher than employment losses in the formal economy. Among informal workers, women have been more affected than men (Figure 5, Panel C) and employees more impacted than independent workers (Figure 5, Panel B).

Figure 5. Decrease in the number of workers in informal and formal employment between the 2nd quarter and the 4th quarter of 2019 and the respective quarters in 2020 in selected G20 countries (percentages)

Decrease in the number of workers		
Panel A. Workers in informal employment compared to workers in formal employment	Panel B. Among informal workers: independent workers compared to employees	Panel C. Among informal workers: women compared to men



* Refers to annual data for 2019 and 2020.
Source: ILO calculations based on national household surveys referring to the second and fourth quarters of 2019 and 2020.

Inactivity is on the rise

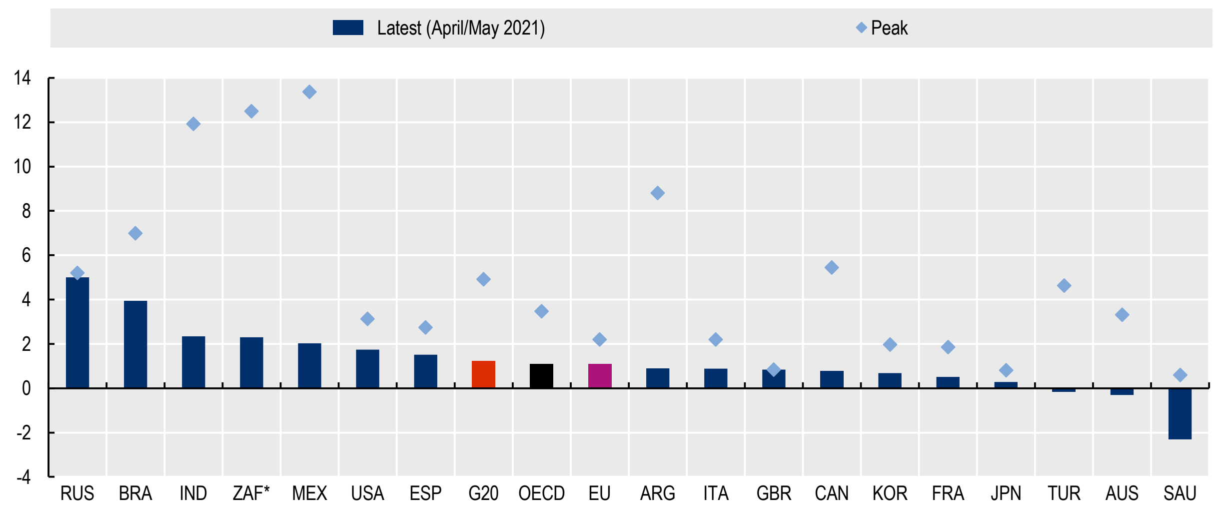
In addition, many withdrew from the labour market, swelling the numbers in inactivity as fear of infection, increased demands at home (particularly for those with small children, with mainly women being affected)

[1] Data based on national labour force survey statistics from eight G20 countries: Argentina, Brazil, Canada, Mexico, Russia, Turkey, South Africa, United States of America. To estimate the impact, data on employment, working time and wages for the second and fourth quarters of 2019 were compared data for the second and fourth quarter of 2020 respectively.

and discouragement to be able to find a job under these circumstances rendered job search difficult. At the peak of the crisis, inactivity had grown by more than 5 percentage points in Canada, and Mexico (Figure 6). Even with the improvement of the health situation, the gradual lifting of restrictions and the recovery of activity on the labour market, labour force participation has not recovered to pre-crisis levels in most countries.

Figure 6. Inactivity rates: changes from pre-crisis levels: trough and most recent

Percentage ratio of inactive to population 15+, percentage point change since February 2020



Note: Peak: highest level of the inactivity rate reached since February 2020. Latest available data other than April or May 2021: November 2020: Norway; March 2021: Chile and the United Kingdom. Quarterly data for Argentina, Brazil, Saudi Arabia and South Africa: starting date in 2019 Q4 and latest 2021 Q1 or 2021 Q2 * South Africa: persons aged 15-64.
Source: LFS Monthly data for Australia, Canada, Chile, Colombia, India, Israel, Japan, Republic of Korea, Russia and the United States. Quarterly data for Argentina, Brazil, Saudi Arabia and South Africa. For the other countries, statistics shown in this Table refer to OECD estimates based on the OECD Monthly unemployment data and the quarterly working-age population aged 15 and over from the LFS. Population in 2021 has been projected with 2020 growth rate in population (aged 15 and over). For Austria, Belgium, the Czech Republic, Denmark, Estonia, Finland, France, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Norway, Poland, Portugal, the Slovak Republic, Slovenia, Spain and Sweden, it has been assumed that all persons aged 75 and over are all inactive.

Teleworking saved millions of jobs

The rise of teleworking observed in March and April 2021 was unprecedented: while about 16 percent of 15 to 64 years old workers usually or occasionally worked from home in 2019, 37 percent of those usually employed before the crisis worked from home in March/April 2020. This large and rapid increase in the incidence of teleworking was observed in most OECD countries, independently of whether and how they granted workers access to teleworking in the pre-crisis context. On average in Europe, 24 percent of employees who had never teleworked from home before started teleworking in 2020, compared to 56 percent of employees who had previously worked from home at least occasionally (ILO, 2021w). Similar measures were taken in other parts of the world where governments urged employers to embrace teleworking to contribute to social distancing, in order to limit the spread of the virus. Estimates of the incidence of home-based work during the Covid-19 pandemic based on survey data from 30 countries show that approximately 17.5 percent of those employed globally performed paid work in their homes in 2020 (ILO, 2021w).

Comparable estimates for 2021 are not available yet; however, several elements support the thesis that teleworking will not fall back to its pre-crisis level. Barrero et al. (Why Working From Home Will Stick, 2020) estimate that 22 percent of working days in the United States are likely to be teleworking days in the future, compared with 5 percent pre-crisis. The forced experiment with teleworking helped overcoming barriers linked to cultural reluctance, and often lead to better-than-expected experiences for both workers and employers; in other words, it helped proving that teleworking could work well.

In addition, the pandemic brought forward many regulatory changes around teleworking across G20 countries, which might in part sustain the higher incidence of teleworking as a new mode of working as the crisis subsides. In addition to temporary measures taken at the height of the crisis, the pandemic hurried some countries into more permanent changes, either through collective bargaining (as in, e.g. Japan), or through legislative changes, such as in Argentina, Mexico, Russia and Turkey (ILO, 2021w). The crisis made salient many unregulated issues (such as the responsibility for the cost of equipment, for occupational health issues, the importance of guaranteeing that workers have a right to disconnect), which are now being addressed. In January 2021 the European Parliament called for the right to disconnect to be recognised as a fundamental right; in June 2020 the European social partners adopted a Framework Agreement on Digitalisation specifying the “modalities of connecting and disconnecting” including a series of preventive measures aimed at guaranteeing worker’s right to disconnect. The new Mexican legislation on teleworking also institutes a right to disconnect for employees.

Another issue of importance to workers is the boundary between a workers’ right to privacy and the employer’s ability to electronically monitor workers. Electronic monitoring in this context refers to the use of computer software to monitor, record, and track employee activities. Information on employee performance is collected in real time (for example, by monitoring emails or telephone calls). In practice, employer monitoring in some countries is more widespread than in others. For example, in one study in the United States it was found that 80 percent of major companies monitor the internet usage, phone and email of their employees (ILO, 2021w). In some countries, the regulatory balance between employer monitoring and worker privacy needs is delicate. In these countries, available regulations permit an employer to monitor workers, but on the condition that workers are notified in advance that the employer will be monitoring them. What is notable is that these rights and responsibilities are generally not defined by labour law as such, but they may be available through a variety of other legal instruments (ILO, 2021w).

Exceptional governmental support protected household income

Despite the substantial impact of the pandemic on employment and earnings, many governments were able to protect household income through deep and wide use of government support through their social protection systems and other mechanisms. This included in particular unemployment benefits, job retention benefits[2], sickness benefits, social assistance, extended family-related benefits, as well as improved access to health care and child care that also protected household incomes (ILO, ISSA and OECD, 2021a) (ILO, 2021b). The coverage and generosity of these schemes was higher in advanced G20 economies, as governments had larger fiscal space to support the implementation of these interventions. On the contrary, G20 emerging economies had typically more limited margin of fiscal manoeuvre and households experienced sharper deteriorations in income levels. This further widened differences in poverty rates across countries. The ILO and OECD estimate that the mobilization of existing social protection systems during the crisis benefited around 2.7 billon people in G20 countries, including at least 21.5 million workers who became eligible for existing social assistance schemes; in addition around 645 million people benefited from 581 new measures introduced up to November 2020 (ILO, ISSA and OECD, 2021a). In

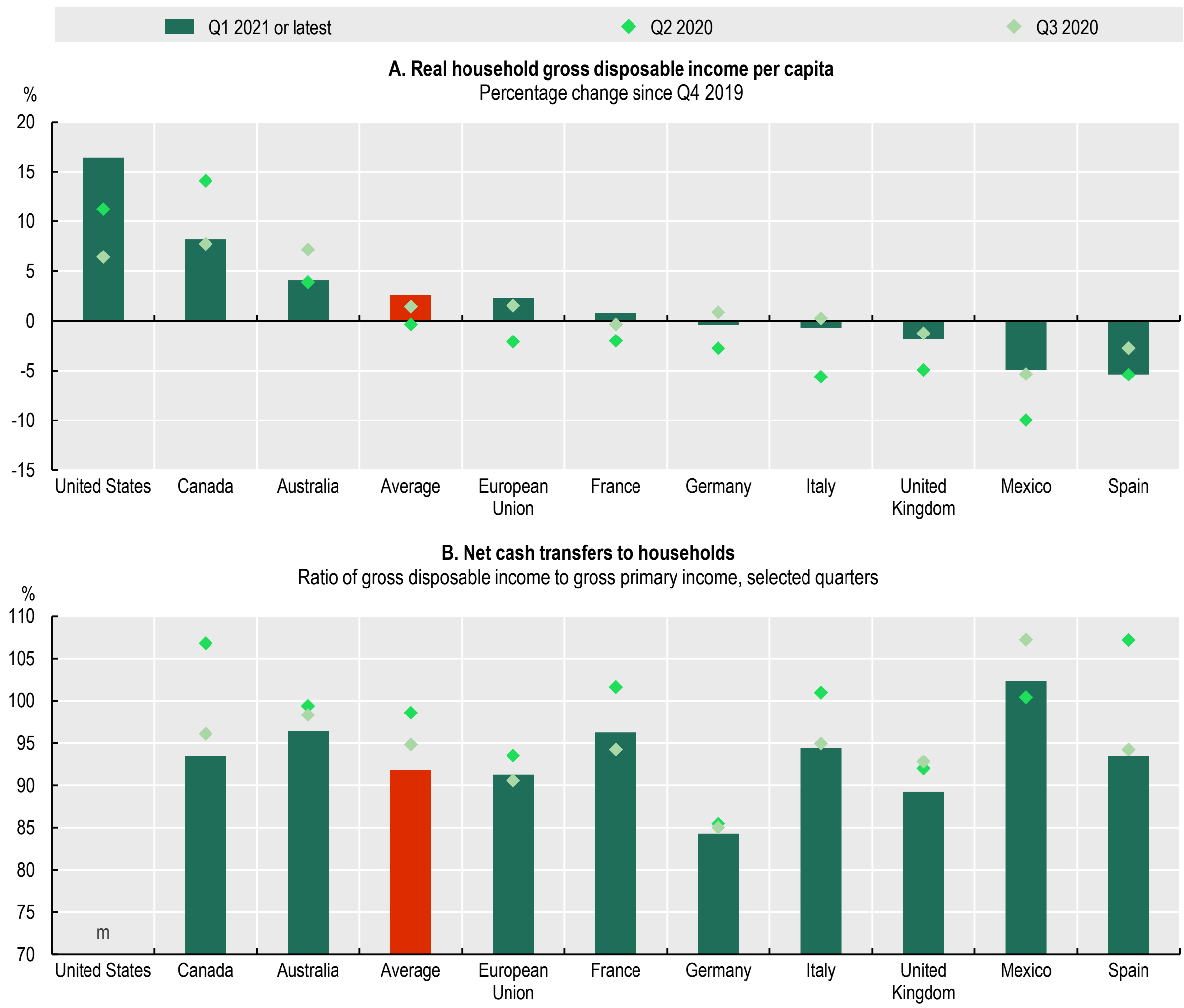
[2] There is a broad variation of such schemes, for example short-time work schemes (e.g. Germany), partial unemployment schemes (e.g. France), furlough schemes (e.g. United Kingdom), or temporary wage subsidy schemes. In some countries, they are provided through unemployment protection schemes, in others through other mechanisms. (ILO, ISSA and OECD, 2021a)

many G20 countries, the expanded income support measures were linked to active labour market policies and employment services (ILO, ISSA and OECD, 2021b).

In Canada and in the United States, large but temporary support led to real household gross disposable income growth of 12.6 percent and 11.1 percent, respectively (Figure, Panel A). In these two countries, however, this growth has since retrenched somewhat, and by the fourth quarter of 2020, growth in household disposable income had fallen to a more modest 6.6 percent and 4 percent since pre-pandemic levels. This is reflective of the temporary nature of the increase in net transfers to households (Figure, Panel B).

Smaller increases in disposable income were also observed between Q4 2019 and Q4 2020 in Ireland (4.5 percent) and Australia (4.1 percent). Despite the increase in net transfers to households in almost all countries (both social insurance and social assistance), many still experienced reductions in disposable income per capita in Q2 2020. However, Italy, Mexico and the Netherlands made strong progress in reversing the negative shock to household disposable per capita income experienced between Q4 2019 and Q2 2020.

Figure 7. Household income was relatively protected



Note: "Average" refers to the unweighted average of countries shown (not including the United States in Panel B). Latest data refer to Q4 2020 for France (Panel B) and Mexico (Panels A and B). Statistics for the European Union in Panel B are not seasonally adjusted. “m”: missing values.

Gross primary income is the income that accrues to households as a consequence of their involvement in the production process (such as compensation of employees, income from self-employment) or as a consequence of ownership of assets that may be needed for purposes of production (net of any payments on liabilities). Household gross disposable income is derived from primary income by taking into account net current transfers; for example, the payment of taxes on income and wealth and social contributions, and the receipts of social benefits from government. It does not include, however, in-kind transfers, such as those related to health and education provided for free or at economically insignificant prices by government. Taxes deducted from income do not take into account the payment of consumption taxes (such as value added taxes). The ratio of gross disposable income to gross primary income shows the impact of the redistribution of income, mainly through government intervention, on the income levels of households.
Source: OECD National Accounts Household Dashboard and Eurostat Quarterly National Accounts.

These figures, while providing some insights into the extent to which support measures have been effective in maintaining livelihoods in the face of the COVID-19 pandemic, tell us little about how the success of government support in protecting the most vulnerable segments of the population. Unfortunately, cross-country micro data on the impact of government transfers is not yet available.[3] Fortunately, however, recent research – see for example Aspachs et al. (Real-Time Inequality and the Welfare State in Motion: Evidence from COVID-19 in Spain, 2020), Bick and Blandin (Real Time Labor Market Estimates During the 2020 Coronavirus Outbreak, 2021), and Chetty et al. (The Economic Impacts of COVID-19: Evidence from a New Public Database Built Using Private Sector Data, 2020)– has been able to harness big data, from private sources, to understand the rapid changes and to inform policymaking in a timely manner. Such work provides tentative evidence that, while rapidly designed and implemented measures have done a remarkable job in protecting the economic well-being of households on average, the labour market characteristics of certain groups may have left them vulnerable and disproportionately exposed. For example, evidence from bank accounts from one of the largest Spanish banks – see Aspachs et al. (Real-Time Inequality and the Welfare State in Motion: Evidence from COVID-19 in Spain, 2020) and (OECD, 2020) – suggests while government support was effective in avoiding soaring household disposable income inequality in the general population, government intervention was less effective in protecting incomes of vulnerable youth. In fact, disposable income inequality among youth appears to have remained persistent also in the first months of 2021. The over-representation of youth in non-standard jobs is probably not extraneous to this phenomenon.

Who risks being left behind in the recovery?

The highly sectoral nature of the crisis has meant that some workers have shouldered the bulk of the burden, while others, not only suffered less, but benefited more quickly from the recovery. Despite widespread availability of job retention support to preserve jobs, increased joblessness played an important role among the low educated, those in low-paid occupations and young people.

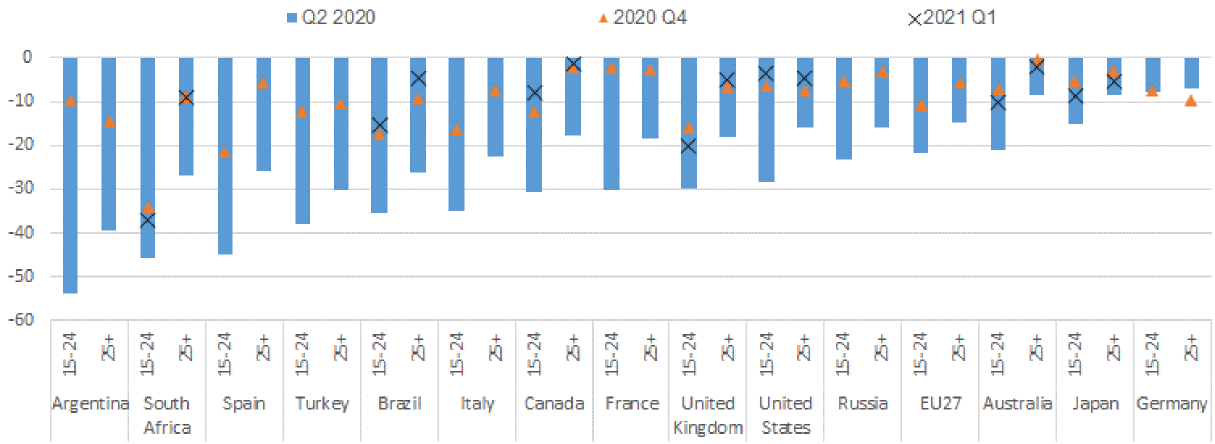
Young people have been particularly affected by the ravages of the crisis (Figure 8). Youth unemployment in the G20 surged at the onset of the pandemic, and hours worked by young people fell by 8.7 percent globally (ILO, 2021a). In nearly all G20 economies where data are available, the decline in the total number of hours worked in the second quarter of 2020 relative to the same quarter in 2019 was far more severe for younger workers than older workers (ILO and OECD, 2021). Many young people – often working in hard-hit sectors and with precarious contracts – have lost their jobs, while those just about to enter the labour market after finishing education have struggled to find employment in the context of limited vacancies. More than 40 percent of the decline in hours worked by young people was accounted for by working time reductions, compared with almost 80 percent among prime aged and older adults (OECD,

[3] Reliable indicators of economic inequality at a high frequency are lacking, with most official statistics on income inequality available only on an annual basis, and often with a long delay.

2021). This is likely to have profound implications for the speed of the labour market recovery among young people.

Figure 8. Employment losses were disproportionally large for young people

percent change in total hours worked by age group relative to the corresponding period in 2019



Note: The data for 15-24 year olds refer to the age group 16-24 for the United Kingdom and the United States.
Source: OECD calculations based on data from national labour force surveys.

Among those holding only a low level of education, the impact of the crisis on hours worked was nearly three times that experienced by those with a high level of education (Figure 9). Indeed, among the low educated, half of the total hours lost in the second quarter of 2020 compared with the same quarter in 2019 was due to increases in joblessness (OECD, 2021). In contrast, for the highly educated, almost all the decline in hours was driven by reductions in working time, with no impact on joblessness. On top, recovery among the low educated remained limited, even when many of those working shortened working hours were able to return to work in the third quarter of 2020 and later. Among those holding only a low level of education, at the end of 2020 almost 10 percent fewer people had a job than one year prior, while employment of those with at least a college diploma grew by 3 percent during the same period.

In low-paying occupations, as the COVID-19 crisis hit, hours worked fell by over 28 percent across the OECD - 18 percentage points higher than the fall seen among high-paying occupations (Figure 6). In the G20, employment decreased more in elementary occupations, service and sales, craft and related trades and clerical support than in other occupations (Figure 9).

Figure 9. Employment changes in the G20 by occupation (percent)

▶ **Change in employment in the G20 by occupation (2019-2020) (%)**

	Female		Male		Total	
	Share in 2019	% change	Share in 2019	% change	Share in 2019	% change
1. Managers	3.7	−1.8	6.2	−3.4	5.2	−3.0
2. Professionals	13.8	0.7	8.3	−0.4	10.4	0.1
3. Technicians and associate professionals	9.1	1.2	6.8	−2.4	7.7	−0.8
4. Clerical support workers	8.6	−7.0	3.9	−5.6	5.7	−6.4
5. Service and sales workers	23.9	−6.1	13.3	−2.8	17.4	−4.6
7. Craft and related trades workers	8.4	−8.0	16.1	−5.5	13.2	−6.1
8. Plant and machine operators, and assemblers	3.3	−5.1	11.1	−3.0	8.1	−3.3
96. Elementary occupations and skilled agricultural, forestry and fishery workers	29.2	−5.2	34.2	−3.4	32.3	−4.0
Total	100.0	−4.3	100.0	−3.4	100.0	−3.7

ILO Modelled Estimates

Source: ILO calculations

The first wave of the crisis hit temporary workers disproportionately. And, while during the uncertainty of the second wave, those on temporary contracts have fared relatively better, the impact of the crisis on workers in non-standard employment, whether temporary or self-employed, has substantial implications for income security and well-being (OECD, 2021). This is because, depending on the social protection system, workers on these types of contracts tend to be less well protected by job retention schemes and unemployment insurance.

As support is rolled back and increasingly targeted, further jobs may be destroyed. Similarly, in countries that have relied primarily on temporary layoffs, eventual recall may not be feasible for many of those who are still expecting to return to their previous employer. As time passes, workers who have not returned to their employers stand an increasing chance of entering open unemployment. As a consequence, those who lost their jobs at the start of the pandemic may be worse off. The number of those unemployed since the onset of the crisis is increasing in most countries. As the recovery takes hold and vacancies start opening again, the majority of these workers will not have worked for well over a year. Even if the overall economic outlook has improved in many countries, there is the risk that a gulf emerges between those who have continued to work and those who have suffered job and income loss, including the self-employed. At the same time, a widening gap may develop between those who have weathered the crisis through reduced hours and short periods on temporary layoff and those who have found themselves jobless, exhausting benefit entitlements and risking long-term scars. Overall, the labour market remains vulnerable to a rapid build-up of longer-term unemployment. At the end of 2020, 60 percent more people had been unemployed for at least six months than before the crisis in the OECD, and these numbers were still rising in the first months of 2021 (OECD, 2021).

3. Policies to consolidate and strengthen the recovery

This section will draw some early lessons from the policies taken to mitigate the labour market impact of the crisis and provide an overview of how policies are adjusting to the recovery phase and beyond.

Reducing workers' exposure to the COVID-19 virus in the workplace

Teleworking and gender

There is no doubt that teleworking saved millions of jobs, although both benefits and risks spread unequally across genders. Traditionally and before the COVID-19 pandemic, a proclaimed objective of teleworking was to support working parents, especially mothers, and reduce gender inequalities in employment (ILO and Eurofound, 2017). While teleworking may make it easier for mothers to juggle paid work and family responsibilities, pre-COVID empirical evidence shows that they do a disproportionate amount of housework and childcare compared to fathers. And the pandemic has been no exception, although fathers seem to have slightly increased their participation in care and housework during that recent period.

This suggests that teleworking may help address childcare problems, but does not necessarily foster co-responsibility between fathers and mothers or create more gender equal workplaces. A conscious decision to encourage more men to embrace flexible working arrangements is necessary to achieve this. To this end, companies should promote flexible working arrangements across the board, from seniority to entry-level, and not leave the decision exclusively to staff of whether, and how frequently, to work remotely. Work-home boundary management support is also key to preventing burnout and allowing for a good work-life balance.

Besides informing employees about which are the normal hours of work, hours of rest and hours of "contactability", companies can also set "core working hours" to provide further flexibility. Equally important is that employees who telework are not penalized relative to those who work at the office, especially in the context where women are more susceptible to spontaneously request more telework days than men (OECD, 2021). Affordable, reliable and high-quality child and elderly care services are essential for employees to telework in an efficient manner, while leave policies, including parental leave, must not reproduce or reinforce the unequal division of unpaid care work.

Adopting strict health and safety standards in the workplace

The pandemic has exposed all workers and people in the world of work to the risk of infection with the novel coronavirus. Some workers have been especially exposed to this risk, such as emergency, healthcare and social workers. Workplaces in which workers spend time indoors in close proximity to one another, including during work interactions, shared accommodations and transport have, in some cases, become sources of outbreaks of the virus. This may be attributed to the difficulty of practising physical distancing indoors and poor ventilation.

In addition to the risk of being infected, workers in all sectors have faced other hazards that have emerged during the pandemic, including increased work-related stress and violence and harassment. New work practices and procedures adopted to mitigate the spread of the virus can also create new occupational safety and health (OSH) risks, including chemical, ergonomic and psychosocial hazards.

Faced with an unprecedented public health emergency, governments have had to take rapid measures to curb the spread of the virus. The action of the actors in the world of work, and particularly in the field of OSH, has been crucial in the emergency response at various levels.

In many countries, new regulations have been adopted to reduce the spread of the virus in the workplace. For instance, the Republic of Korea rapidly developed comprehensive workplace guidelines which implementation resulted in very few reported infections in workplaces - even in sectors such as manufacturing. In some countries, COVID-19 has been recognized as occupational injury. It is the case in Turkey for healthcare workers or emergency personnel who contracted COVID-19 in the workplace or in Argentina for workers in essential services. Italy and Spain expanded such recognition, without limiting it to specific sectors or occupations. Due to the increased risk of both physical and psychological violence and harassment, India has introduced a new legal ordinance making physical violence against healthcare and frontline workers an offense punishable by up to seven years of imprisonment. Finally, the COVID-19 crisis has highlighted the need to reinforce labour inspection systems to meet these new challenges. For example, the Spanish Labour Inspection department created a specific Management Unit to deal with the impact of COVID-19 on the world of work, aimed at strengthening preventative actions and protecting workers' individual and collective rights that may be ignored or limited in times of a pandemic (ILO, 2021d)**.**

The COVID-19 crisis has clearly demonstrated the need for strong national OSH frameworks that include mechanisms to ensure social dialogue on OSH (ILO, 2021c). A common mechanism developed by countries to guarantee workers' and employers' participation in OSH governance is the OSH national tripartite advisory body on which relevant ministries, institutions and social partners involved are represented. In Australia, the National COVID-19 Coordination Commission established an Industrial Relations Working Group to support safe and healthy working environments during the pandemic.

In the context of the COVID-19 pandemic, occupational health services have often been responsible for tracking confirmed and suspected cases, tracing any potential contagion, instructing workers to quarantine, and notifying public health and social security authorities of their findings. They are also responsible for making recommendations that facilitate the adaptation of work to the workers and protect vulnerable groups of workers. For example, in the United Kingdom and France occupational physicians have worked with employers to assess the susceptibility of workers to COVID-19 – either on account of their jobs or pre-existing conditions. They have sought to find solutions to mitigate risk when necessary, such as isolated offices, teleworking arrangements and personal protective equipment (PPE).

The provision of OSH training is also an important component of the crisis response, as workers need to know how to apply and follow the new measures and procedures they encounter. OSH training plans have been amended to prevent transmission of the virus, implement administrative and engineering controls to curb viral spread, and avert psychosocial effects due to changing work arrangements. In South Africa, the government required that all workers returning to work premises complete a training on COVID-19 and OSH.

Securing jobs, saving companies and maintaining essential service provision

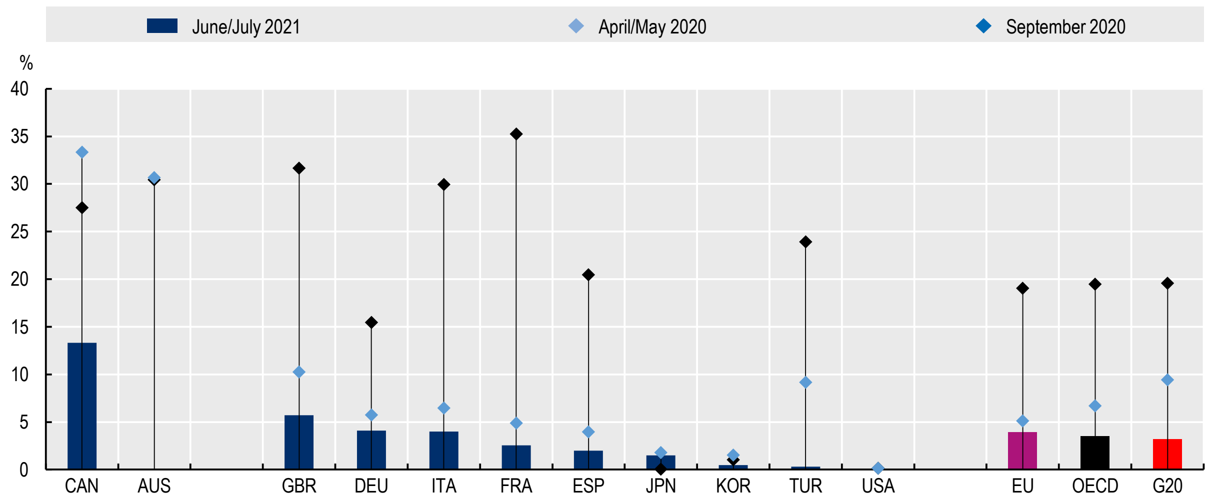
Short-time work schemes

Job retention (JR) schemes, either in the form of short-time work schemes or wage subsidies, seek to preserve jobs at firms experiencing a temporary decline in business activity by reducing their labour costs and supporting the incomes of workers whose hours are cut back. While there are important differences in their design and implementation across countries, a crucial aspect of all JR schemes is that employees' contracts remain in force even if their work is fully suspended. Financial support allowed firms to reduce working time in line with the decline in business activity at limited or no costs, significantly reducing the number of jobs at risk of termination due to liquidity constraints.

On average across the OECD, the use of JR support peaked in April 2020 at the unprecedented level of around 20 percent of employment, supporting approximately 60 million jobs, more than ten times as many as during the global financial crisis (Figure 10). In contrast with what occurred during the global financial crisis, take-up rates were high both in countries with pre-existing schemes and those that introduced new ones. Average take-up declined quickly to 7 percent by September 2020 with the reopening of the economy, and remained above 6 percent until the first months of 2021, increasing again in some countries as they saw a resurgence of the virus, while receding in others.

Figure 10. The use of job retention schemes was very high across countries

Percentage of dependent employment (April/May 2020, September 2020, June/July 2021



Note: Take up rates are calculated as a percentage of all dependent employees in Q1 2020. ‡ Italy, Slovenia, and the Slovak Republic: Latest data refer to December 2020.*Hungary, Poland and Portugal: Data for December unavailable. # Estonia and New Zealand: Scheme no longer operational. †Japan, the Netherlands: estimate based on the total use during the reference period and the assumption that support is provided for no more than three months during this period, the United States: Refer to short-time compensation benefits. Sorted by latest available data.
Source: OECD, National sources.

Importantly, the strong decline in take-up in response to improved economic conditions suggests that the unprecedented levels of use are unlikely to persist once the economic recovery takes hold. However, take-up is likely to become more persistent as time goes by since firms with structural problems are more likely to continue relying on JR support, while other firms resume their activity.

The use of JR schemes was particularly large in sectors most affected by government restrictions such as hotels and restaurants, arts and entertainment as well as wholesale and retail. As a result, the incidence of JR support was relatively high among young workers who represent a disproportionate share of the workforce in those sectors.

Preliminary evidence on the effectiveness of JR schemes during the first six months of the COVID-19 crisis suggests that they played an important role in limiting job losses and averting a surge in unemployment. If the reduction in hours pursued through the use of JR schemes had fully translated into reductions in employment in the absence of JR schemes, the fall in the number of employees might have been as large as 11 percent instead of the decline of 4 percent observed in the second quarter of 2020 (OECD, 2021). The actual effect might have been smaller because some firms might have been able to retain some workers even without the help of JR schemes, in part due to complementary measures taken by governments to provide liquidity to firms.

At the same time, there is limited evidence that JR support so far has hampered job creation by locking workers into firms with structural difficulties. Support overwhelmingly went to firms in sectors affected by government-mandated restrictions and thus experiencing temporary difficulties due to the COVID-19 crisis, while job vacancies remained depressed during this period, suggesting that opportunities for job mobility were rather limited.

Going forward, concerns about the possible adverse effects of JR schemes on job reallocation are likely to grow, but withdrawing the support too early or too widely risks generating a sudden wave of layoffs. A careful scaling back of JR support should be implemented flexibly, closely following the evolution of the economic and health situation, and likely requires a differentiated approach across sectors. Firms and sectors whose ability to operate remains constrained by health recommendations or legal restrictions should continue to receive strong JR support. In other sectors, however, continuing to provide generous support after the end of health and legal restrictions carries an increased risk of supporting unviable jobs and consequently potentially undermine job creation and reallocation as economic activity resumes. Here, the challenge for governments is to adapt JR schemes to provide incentives for firms and workers to use support only for jobs that are temporarily at risk but remain viable in the longer term. This can be achieved by re-introducing stricter limits to the duration of JR support, and gradually increasing firms' participation in the cost of the scheme.

However, JR schemes will not successfully preserve all jobs as some may have become permanently unviable. Some workers in subsidised jobs may have limited career prospects and remain at risk of losing their job eventually. Government can promote the career prospects of workers by investing in the viability of their current job or facilitating job mobility across firms. This can be achieved by offering workers on JR support the help of public employment services and facilitating or incentivising their access to training. Financial incentives could also be used to promote the mobility of workers from jobs supported by JR schemes to other jobs – for example, by temporarily subsidizing employee social security contributions for workers starting a new job in a firm not receiving JR support or by providing an in-work benefit for a limited time.

Hiring subsidies

There will be no way out of the crisis without a substantial rebound in job creation, which remains well below the pre-pandemic levels. Jobs lost since the outbreak of COVID-19 will not easily return. Hence, the priority is to create new jobs. The recovery plans that many OECD countries are preparing will play a key role in this. However, their full rollout will take several months or years.

In the short term, fiscal and monetary policies need to remain supportive. At the micro level, temporary and targeted hiring subsidies can be an effective tool to promote job creation and a number of OECD countries have recently introduced or renewed such schemes (for instance, Australia, France, Italy and the United Kingdom). Evidence from the global financial crisis suggests that hiring subsidies can boost job growth and be cost effective (Cahuc, Carcillo and Le Barbanchon, 2018[21])

Financial incentives could also be used to promote the mobility of workers from jobs supported by JR schemes to other jobs. For example, it may be possible to temporarily reduce employee social security contributions for workers starting a new job in a firm not receiving JR support or to temporarily provide an in-work benefit. These job mobility bonuses compensate workers for the cost of changing jobs, while at the same promote the reallocation of workers in subsidised jobs to expanding firms. A similar bonus could be made available for persons moving from unemployment into work as well as new labour market entrants (e.g. youth). The fiscal cost of such a measure would most likely be limited if kept for a short period of time (say 3 months) since the cost-saving effect of reduced JR (or unemployment) benefits would most likely outweigh the cost of the bonus. In Spain, it is possible to keep JR benefits for a limited period of time after having moved to another firm.

Minimum wages

During the pandemic, some countries chose to freeze their minimum wage to avoid weighing on firms' solvability, in the context a massive supply shock. A number of G20 countries, for example Brazil, Spain and Germany, chose to increase their minimum wages by a lower percentage than usual, thereby making it lower than it would have been in the absence of Covid-19, instead of freezing them. Other countries, for example Canada (Quebec) and the United Kingdom, increased their minimum wage in the 2nd quarter of 2020 more than in previous comparable periods (ILO, 2020e).

The current crisis hit lower-paid workers the hardest and women are over-represented among them. The crisis offers an opportunity to re-evaluate the adequacy of wages in some mostly female-dominated low-paid sectors, which have proven essential and of high social value during the pandemic (ILO, 2020e).

Providing income security and employment support to affected workers

Income support for those who lost their jobs

As reallocation and creative destruction are characteristics of any recovery, while the perspective of quickly finding new employment remain poor for some, adequate income support for those losing their job or business income (unemployment benefits, paid sick leave and sickness benefits, paid family and care leave) remains a crucial priority. Indeed, recent figures collected via the OECD Risks that Matter Survey (OECD, 2020) suggest that, on average across surveyed countries, close to one in three households affected by job loss since the start of the pandemic report being unable to pay a usual expense, while one in eight report having gone hungry. Adequate income support is necessary for all workers regardless of their employment status (ILO, ISSA and OECD, 2021a; ILO, 2021b). The crisis indeed laid bare existing social-protection gaps for workers in non-standard and informal employment. Without adequate support, many of them faced severe and often long-lasting income shortfalls and – in the absence of savings – a risk of economic hardship.

All G20 countries took steps, from the early weeks of the crisis to improve the accessibility and/or the generosity of "first-tier" unemployment insurance or "second-tier" unemployment assistance benefits, or put in place other measures to protect jobs and incomes (OECD, 2020). In particular, many countries improved access to and coverage of unemployment benefits by reducing or entirely waiving minimum-contribution requirements, extending the qualification period for the employment requirement or covering groups that had previously not been entitled. While those measures primarily benefited workers in full-time long-term employment who lost their jobs, some countries temporarily opened up benefits to groups who otherwise would not have qualified, including workers in temporary and part-time employment and in some cases also self-employment. In addition, many countries have taken measures to improve access to non-contributory income support for vulnerable workers and low-income households, and/or to raise support levels, many of them through temporary emergency measures such as facilitating access to existing minimum-income schemes, such as social assistance, and introducing specific cash transfers for self-employed workers.

Support to informal economy workers

Informal workers and enterprises are not registered, which makes it difficult for public authorities to identify and reach them, while contributing to the distrust of the former towards public authorities (ILO, 2020a). In addition, the informal economy is highly heterogeneous, which requires policy interventions to be tailored to the diverse characteristics, circumstances and needs of the workers and economic units concerned.

However, in a number of G20 countries, some policy measures have reached those in the informal economy. Some countries have channelled additional fiscal resources into their health systems to enhance the availability and accessibility of health services for all, therefore including informal economy workers. Countries, such as China, Japan and the Republic of Korea, have channelled additional fiscal resources into their health systems through COVID-19 stimulus packages, enhancing the availability, accessibility, acceptability and quality of health services for all. China have integrated COVID-19 testing and treatment into their health care benefit packages, which are also available for informal economy workers.

Others have provided income support to additional population groups, including informal economy workers, by extending coverage of existing schemes or by setting up exceptional mechanisms. This was done through: i) direct measures targeting specifically informal workers or informal enterprises; and, more often, ii) indirect measures targeting all the poor or vulnerable, or increasing the scope of public actions to the whole population, or, in the case of businesses, targeting all micro and small enterprises that are more likely to be informal. In Argentina, *Ingreso Familia Emergencia*, provides an exceptional non-contributory cash benefit for unemployed, informal economy workers, single payers in lower categories and domestic workers.[4] In Brazil, unless they receive other benefits, informal workers, including intermittent contracts and freelancers can receive a monthly payment of up to BRL 600 for three months; such payments are limited to two persons per family. The programme might have up to 54 million beneficiaries.[5] In India, the Finance Ministry has announced economic relief measures, including a $24 billion scheme for cash transfers and free food ration, free cooking gas for at least three months to beneficiaries of various government schemes, and has issued guidelines to State governments for diverting emergency funds for COVID-19 response.

Some governments have put in place financial and non-financial support for micro and small enterprises, including or targeting informal enterprises, to keep them afloat, avoid their closure, prevent informalization and reduce job losses (ILO, 2020b). Mexico, for example, provided business support measures targeting mainly micro-entrepreneurs and the informal sector that include the expansion of microcredits for welfare, through interest-free microcredits and the extension of the grace period from one to three months. Typical business support measures adopted in countries include fixed-term deferrals on the repayment of loans from banks, microfinance institutions and other financial service providers, and on the payment of personal and corporate taxes, as well as government-backed loan guarantee schemes aimed at enterprises that are more likely to be on the edge of informality. Other measures contribute to prevent informalization of formal enterprises and jobs, such as short-time work schemes, furlough and wage subsidies (ILO, 2020c) (ILO, 2020d) as illustrated by the CARES Act in the United States.[6]

The identification and registration of eligible groups, especially those operating in the informal economy, has been challenging for many countries. An inclusive strategy that targets broad categories of low-income workers, independently of whether they are formal or informal, can not only overcome the said challenge, but also avoid creating incentives for workers to stay or become informal. It can provide the basis for facilitating their transition to the formal economy. What matters is that the eligibility criteria should not lead

[4] See Government of Argentina. COVID-19 - Ingreso familiar de emergencia.

[5] See Government of Brazil. LEI Nº 13.982, DE 2 DE ABRIL DE 2020.

[6] The Coronavirus, Aid, Relief, and Economic Security (CARES) Act in the United States of America provides for an employee retention credit to help employers keep their employees on the payroll. The CARES Act also allows employers to defer until 2021 and 2022 the payment of their portion of social security contributions. See BILLS-116hr748enr.pdf (govinfo.gov).

to the exclusion of those in the informal economy.

Helping workers with unforeseen care needs

The COVID-19 pandemic has demonstrated the major gaps in the long-term care system and it has highlighted the importance of unpaid carers and the challenges they face, especially when employed. Even before the COVID-19 pandemic, in many G20 countries, the support structures available for unpaid carers have been patchy, but since the onset of the COVID-19 pandemic many carers have been providing care non-stop without their usual support structure.

Most countries have provided pandemic income support, subsidies and parental allowances to workers with care responsibilities (e.g. Australia, China, Germany, Japan, Republic of Korea, and United States) and supported company-led babysitter programmes (e.g. Japan). Australia provided a four-month (April-July 2020) Early Childhood Education and Care Relief Package to protect the viability of the early childhood education sector, whilst providing free childcare to Australian families. The United Kingdom promoted the care allowance to provide at least 35 hours of care to a severely disabled person in receipt of a qualifying disability benefit. In addition, the United Kingdom introduced regulations to ensure that individuals did not lose out on entitlement to parental pay because of any reduction in actual earnings during the duration of the scheme. They enabled workers who are furloughed to use pre-pandemic earnings for the purposes of calculating entitlement to family-related statutory pay.

In terms of provision of care services, the United States has strengthened efforts to provide childcare services for low-income families whose members are in employment or in education. Likewise, the Russian Federation increased investments in childcare and educational facilities.

Efforts were also important in providing special leave for workers with unforeseen care needs. Australia provided a special pandemic leave for all employees unable to attend work as a result of COVID-19, France established a special paid leave for one of the two parents when childcare facilities remained closed and the Republic of Korea promoted an emergency family care leave subsidy programme. The United States enabled certain public employers and private employers with less than 500 employees to provide employees with paid sick leave or expanded family and medical leave for specified reasons related to COVID-19. Germany temporarily increased long-term care leave for family members of older persons in need of care from 10 to 20 days where a gap in the community long-term care usually available occurred. The United Kingdom promoted the care allowance to provide at least 35 hours of care to a severely disabled person in receipt of a qualifying disability benefit.

In addition, China has recognized work injury insurance benefits to medical workers and related personnel who contract the virus or die from the COVID-19 in the performance of their duties, while Australia awarded paid pandemic leave for health workers in long-term care. Other G20 countries have taken measures to support family members of persons with a long-term functional dependency (e.g. India, Australia, China, Germany and the United Kingdom). In addition, China has developed specific support services for older people whose family carer was in quarantine or was a healthcare worker (Unesco, 2021).

Taking a step back, the COVID-19 pandemic affected the amount of housework, its distribution within families, and, perhaps, long-term attitudes towards unpaid housework. As of June 2021, many G20 countries had reopened their schools at least partially, but in Mexico and Turkey schools remained closed (Unesco, 2021). In 2020 and the first half of 2021, school and childcare facility closures were frequent, while important shifts to teleworking arrangements changed durably the working environment. In Italy and Spain, for example, most of the additional unpaid work burden fell on women, even though men increased their contribution too (Del Boca, Oggero, Profeta, & Rossi, 2020; Farré, Fawaz, González, & Graves, 2020). Unpaid house work also increased in the United Kingdom and the Unites States, but evidence as to whether that led to more egalitarian sharing is mixed (Carlson, Petts, & Pepin, 2020; Hupkau & Petrongolo, 2020; Oreffice & Quintana-Domeque, 2020; Xue & McMunn, 2021). Despite the increased burden on women in many countries, men generally increased their contribution to housework during the pandemic, albeit from an often low base. In the long-term, this may shift gender norms around unpaid work as men have become more exposed to the burden of domestic work and primary caregiving (Alon, Doepke, Olmstead-Rumsey, & Tertilt, 2020; Hupkau & Petrongolo, 2020).

It is too early to say how future COVID-19 trends may pan out, but in as much as countries have not already done so, they should have measures in place which strengthen workers' rights to flexible working arrangements, part-time work options to help cope with potential part-time school closures, and options for family care leave or contingency plans for alternative care services if another wave of COVID-19 emerges which requires school and child-care facility closures.

Extending parental leaves schemes

Besides, the COVID-19 pandemic and the associated closures of school and childcare facilities prompted some countries to accelerate change and increase the duration of paternity leave provisions on a permanent basis. Italy extended the obligatory paternity leave to 10 days, which are fully paid by social security at 100 percent of previous earnings without limit. France, starting July 1, 2021, doubled the duration of paternity leave to 28 days, with 7 compulsory days to be taken at the birth of the child. The employer continues to cover the three first days of birth leave, while the remaining 25 days are compensated by social security up to a maximum of 3,428 EUR (4,085 USD). Spain also reformed paternity leave legislation and, from January 2021, fathers are entitled to 16 weeks leave, aligning paternity leave to maternity leave. Of these 16 weeks of paternity leave, 6 weeks are compulsory and have to be taken right after the birth or adoption. The earning replacement is 100 percent up to a ceiling of 4,070 EUR (4,850 USD) monthly. Likewise, from July 1st 2020, the Netherlands increased paternity leave from 1 week to 6 weeks, the estimated government spending amounting to 160 million EUR (191 million USD) per year to cover around 130,000 fathers.

In the course of 2020, some G20 countries also reformed parental leave schemes. For example, the United States introduced a new parental leave scheme for public employees employed by the federal government, who are now entitled to 12 weeks of paid parental leave following the birth, adoption or fostering of a child. The Republic of Korea raised the upper limit of the parental leave benefits for single-parents to 2.5 million KRW (2,215 USD) payable in the first three months when wage replacement stands at 100 percent. More efforts of G20 governments, as well as, employers' and workers' organizations are needed to ensure that women and men in employment, irrespective of their contractual status, can benefit equitably from care leave policies.

Overall, the aggregate impact of government policy interventions to support income is impressive. Indeed, between Q4 2019 and Q2 2020, despite falling GDP per capita by 12.4 percent across the OECD area, real household gross disposable income grew by 3.9 percent on the back of large-scale COVID-19 government support measures. This is reflective of the temporary nature of the increase in net transfers to households, and, in particular, that action taken to close gaps in social security was based on temporary fixes rather than structural changes.

Employment support and training for job losers

Throughout the pandemic, G20 countries recognised the importance of supporting their economies via the use of active labour market policies to maintain employment and facilitate the connection of workers with firms. Seventy percent of countries responding to a joint OECD-EC survey7 increased their budgets for Public Employment Services in 2020 and 82 percent increased spending on other active labour market policies (ALMPs). Similar numbers planned to do so for 2021 (See (OECD, forthcoming); (OECD, 2021)). Similarly, preliminary results from the ILO global survey of public employment services conducted in 2021 show that the majority of countries that responded to the survey had their budgets increased (63 percent) compared to 17 percent that saw their budgets decrease and 20 percent with no change. Public employment services (PES) were more likely to increase their budgets for benefit support (over two-thirds) and ALMPs (six in ten) (ILO, Forthcoming).

In addition, around two thirds of G20 countries made significant changes[8] in PES operating models and scaled up their offers of digital and remote services. Countries offered remote or digital access to around 50 percent of their services prior to the pandemic. This increased to around 90 percent after the onset of social distancing and physical restrictions. To make digital service provision more inclusive going forward, efforts need to be made to ensure all individuals have the access to technology and skills needed to participate fully. Moreover, PES should continue to provide face-to-face services to people with limited digital skills and more complex needs.

Countries are currently moving from short-term responses to the crisis, mainly involving changes in the operating models of their public and private employment services, to medium- and longer-term strategies that focus on ALMP design and targeting alongside new ALMP delivery models. They scaled up and introduced measures to support the demand for labour in the early stages of the crisis through employment incentives, such as hiring subsidies and temporary waivers of social security contributions (more details can be found in (OECD, 2021)). This was particularly useful to limit the jobs fallout, work in tandem with short-time work schemes and prevent detachment of people from the labour market. In line with the evidence that targeting of these measures can increase their effectiveness, many countries targeted their new measures on young people, particularly affected by the crisis and at risk of prolonged labour market scarring from unemployment. Measures to help similarly affected individuals with disabilities, or those long-term unemployed were also introduced. Acting early allowed greater headway to focus on re-orientation towards training policies that can help economies re-allocate labour to support economic restructuring.

Recognising that training is vital to match workers to jobs in the short- and long-run, countries have increased training offers to support reallocation of workers and to upskill those at risk of displacement. All G20 countries surveyed had moved training courses online and 73 percent had introduced new online courses, as part of their plans to ensure they could equip individuals with the skills needed for their economies to thrive as they moved through the pandemic. Fifty-five percent of countries had offered funding for additional on-the-job or institutional training places. These places will be crucial to supply firms with effective labour as economies re-open and adjust to the current industrial landscape. Special emphasis was placed on training in the use of digital tools. The crisis has shown that digitalisation can increase resilience and preserve capacity in the face of stringent curbs to physical interaction.

While technology offers new possibilities, disparities persist for some groups of jobseekers owing to the

[7] The OECD-EC questionnaire collected information about changes in PES and ALMPs introduced by OECD and EU countries to mitigate the rise in (long-term) unemployment. Eleven G20 members responded to this questionnaire: Argentina, Australia, Canada, France, Germany, Italy, Japan, Republic of Korea, Mexico, Turkey and the United Kingdom. Argentina was approached through the OECD's cooperation with WAPES.

[8] Significant changes defined as having augmented or introduced remote or digital access to 5 or more of the 9 activities surveyed in the questionnaire.

digital divide. In 50 percent of surveyed PES responding to an ILO global survey[9], the delivery of services through technology-based channels remains low for women as single parents, migrants, refugees, displaced workers, minorities and indigenous people. Targeted labour market interventions and broader access to PES digital services are critical to maintain the employability and job-readiness of clients who have insufficient digital skills, confidence or access to take full advantage of available job and career opportunities. Placing clients at the centre of technology transformations allows PES to better integrate new solutions into the job-search strategies of jobseekers in need of enhanced support. Inclusive and gender-sensitive approaches can accelerate recovery and encourage labour market participation in a digital era (ILO, 2021e).

It is still too early to know if these investments in PES and ALMPs are sufficient to address the consequences of the crisis and support workers, jobseekers and employers. Learning from the global financial crisis, it is likely that additional investments into PES and active labour market programmes will be needed going forward to ensure a continuation of adequate support for larger numbers of job losers and to facilitate the reallocation of labour from declining to growing sectors. Moreover, the basket of active ALMPs that countries offer should be flexible and responsive, to allow quick and strong reactions to immediate shocks to labour demand.

Against the background of the nascent recovery, it is crucial to ensure that ALMPs are effective, reach the people in need and respond well to their needs. Evaluating the impact of the measures introduced or redesigned during the pandemic is essential to promote cost-effectiveness. Countries should continue their efforts to integrate monitoring and evaluation mechanisms in their policymaking process.

4. Moving beyond the pandemic

In the coming months, it is essential to continue supporting both households and jobs that remain viable, while providing the right incentives for job creation and resuming work. Withdrawing support too soon risks generating mass bankruptcies and employment losses in sectors still deeply affected by the effects of the crisis, making the recovery more difficult and uncertain. Furthermore, the short-term costs of these measures can be reduced by enhancing the targeting of support to the most vulnerable sectors, companies and households, while fostering start-ups and productive employment creation. Given the important role of sustainable enterprises as generators of employment and promoters of innovation and decent work, support for business continuity and an enabling environment for innovation, productivity growth and sustainable enterprises, including micro, small and medium-sized enterprises, continues to be important as the recovery takes hold.

Long-standing disparities in opportunities and outcomes, however, have weakened the ability of vulnerable workers and households to withstand the pandemic-induced crisis, despite the efforts to help them with emergency measures. Crisis periods often bring about further challenges in the labour market, compounding pre-existing ones. There is a real risk that the COVID-19 crisis will entrench inequality and exclusion unless governments put fighting these issues at the heart of the recovery. Failing to address inequality and exclusion now is likely to result not only in deeper social divisions, but also will have negative ramifications for productivity and the economic recovery itself. In parallel, countries need to strengthen the resilience of the labour market to be better able to withstand future possible crises. This is made even more urgent not only because the current pandemic is not fully over, but also because there may well be other future shocks, including pandemics, natural disasters and climate change risks.

[9] The ILO global survey on the "Use of technology by public employment services" collected information from 75- PES in 69 countries. This survey is part of the ILO's future of work agenda for employment services and was applied with support from WAPES. Infographic: ILO maps out technological transformation in Public Employment Services.

Targeting the hardest-hit and most vulnerable groups to mitigate the long-term effects of the crisis on labour market outcomes includes strengthening occupational safety and health (OSH) measures, recognising that safe and healthy working conditions are fundamental to an inclusive, sustainable and resilient recovery. Sound OSH policies and regulations, complemented by consistent and timely guidance, can help roll out an effective and efficient preparedness and response strategy that will protect workers' safety and health and increase the chance of business recovery or continuity. The COVID-19 pandemic has emphasized the need for an OSH regulatory framework that is comprehensive, defines basic rights and responsibilities, covers all workers and addresses all OSH-related risks. It should also be functional and responsive, allowing for the adoption of rapid and appropriate measures to face unforeseen contexts and mitigate both new, emerging and existing OSH risks. While the public health system has a responsibility to prevent the spread of the COVID-19 virus and other public health threats to the entire population, strong and effective national OSH systems are essential to safeguard the life and health of workers, and for this they must be equipped with adequate human, material and financial resources.

It also includes curbing the spread of informality and accelerating the transition to the formal economy, as well as implementing transformative policies for gender equality through investments in the care sector, better access to paid care leave and promotion of a more balanced sharing of work and family responsibilities, ensuring equal pay for work of equal value and removing legal and other types of barriers to entry and advancement in education, training, employment and careers, including by combating gender stereotypes and occupational segregation.

Investing in job-rich economic transformations

In previous recoveries, many countries tightened public spending prematurely. This time, an unprecedented amount of resources have been made available in 2020 and 2021, with a number of countries committing to a prolonged injection of resources over the next five to ten years. The Government of the United States is committing trillions of US dollars, for example, while the European Union is borrowing on behalf of its member countries for the first time to support often large national recovery and resilience plans to be implemented in the next five years. In these countries, this will provide a once-in-a-lifetime opportunity to address the main long-standing structural challenges that have been exacerbated by the COVID-19 crisis. In some G20 emerging economies, further efforts are needed to secure financing of longer-term policy priorities, particularly as part of their recovery strategies and visions for a post-COVID-19 economy and labour market.

The recovery from the pandemic will take place in a context of profound transformation of our economies and labour markets and the process of creative destruction, whereby certain tasks are either taken over by machines or offshored, and others are created, has been accelerated by the crisis. Evidence from online job postings suggests that during the crisis, hirings in those occupations involving routine and physical abilities that were already losing ground before the crisis have plummeted (OECD, 2021; OECD, 2021). At the same time, those occupations involving cognitive and digital skills that were projected to expand, also resisted the downturn in hirings better. In parallel, ageing of the working population may hinder the speed of job reallocations towards growing sectors and firms, which typically accelerate during the recovery phase. Such reallocations often require both occupational and geographical mobility as well as the acquisition of new skills.

The recovery process is also a unique opportunity to address the risks of a looming climate and environmental crisis. There is indication that investing in a green recovery has to potential to deliver more and better jobs that conventional approaches. One assessment suggests that investments into renewable energies, building efficiency and green transport could add some 20.5 million jobs in 2030 worldwide. This compared to around 3 million additional jobs in a conventional scenario of the same size, which stimulates the economy through a cut in value added taxes (PAGE, 2021). However, the levels of spending in climate-related areas, skills for green and just transition appear significantly low at the moment, and signal the risk of missing an important moment to achieve double dividends with socio-economic and climate gains from the recovery packages.

Providing for a broad-based, job-rich recovery with decent work opportunities for all requires that the economic transformations under way be leveraged to create productive employment. This means combining labour market supply-side measures and well targeted ALMPs with supportive demand-side policies, including supportive macroeconomic, fiscal and industrial policies that foster equity and stability and appropriate public and private investment in sectors hardest hit by the crisis and those with strong potential to expand decent work opportunities (ILO, 2021f). Leveraging the opportunities of just digital and environmental transitions to advance decent work, inter alia through social dialogue, can significantly contribute to a human-centred recovery. It is important to ensure that new and existing resources be channelled to the sectors where the impacts on employment and incomes are large (e.g. care and health) and/or those which can leverage structural changes for decent work (e.g. green, digital). National financing frameworks and strategies need to be aligned with these policy priorities.

Investing in effective skills policies

To allow people to cope with such challenges, keep their jobs or move to new, more productive ones, upskilling and reskilling will be crucial. And yet, training opportunities are significantly unequal while skills policies often fail to reach those who are more at risk, including young people.

On average, across OECD countries, almost one in four adults lack even basic information-processing skills (digital skills) and can only do simple tasks on computers. Yet, participation in training by those with less than secondary education is 40 percentage points below that of adults with tertiary education (OECD, 2019). Similarly, workers whose jobs are at high risk of automation are 30 percentage points less likely to engage in adult learning than their peers in jobs with a lower risk.

Low-skilled workers, those in jobs at high risk of automation and workers who lose their jobs are often -- reluctant to train or unable to identify relevant learning activities. Even when they are well informed and motivated, some workers face other barriers, such as a lack of time, unfavourable work conditions or money to train. Meanwhile, employers are more likely to invest in training higher-skilled workers where the return to such investment is expected to be higher.

Micro, small and medium enterprises (MSMEs) employ 70 percent of the global workforce and are facing enormous challenges linked to the disruption of values chains that will require considerable investments in training and retraining. Workplace transformations brought upon by digital transformation and environmental pressures reinforce this pressure in MSMEs that have low financial and human resources. MSMEs tend to provide less training opportunities to their employees and as the COVID crisis demonstrated (ILO, 2021g), are generally less prepared to deal with the challenges ahead to survive, retain their employees and achieve greater sustainability and innovation (ILO, 2021h).

All efforts should be made to promote a culture of lifelong learning that connects training to individual needs and makes learning a hallmark of working contexts, rather than simply “training for jobs”. Lifelong learning systems will need to be strengthened and adapted to provide all workers whether in the formal or informal economy, and in particular those most vulnerable to the changes that lie ahead, with adequate opportunities for (re)training throughout their careers. Awareness of the benefits of training and the capacity for individuals to manage training investment and careers can be raised through better career guidance (Inter-Agency Working Group on Career Guidance, 2021). However, training formats also need to become more modular and flexible to fit around busy work schedules and family responsibilities. Skills acquired through experience should be recognised allowing workers in the formal and informal economy to access relevant qualifications. Flexible training and recognition processes should be supported by effective digitalisation of skills systems. This includes the hybridisation of learning, equitable access to equipment, digital skills development and the development of reliable digital credentials.

More targeted and effective financial incentives should be designed to reduce the cost of training borne by the most vulnerable groups and support inclusive reorganisation of the workplace in MSMEs towards greater sustainability and innovation. Moreover, it is critical to improve the quality of programmes and their alignment with current and future labour market needs, and to evaluate their effectiveness on a regular basis. To this end it is important that countries develop systems that allow to identify current and future skills needs. Social partners can and should play an important role in delivering this agenda, though effective social dialogue, representation and participation in skills policies, enhancing the access of vulnerable groups to training, in cooperation with governments. Finally, increasing the coordination between social protection measures and skills development also proves very effective (ILO, ISSA and OECD, 2021b).

Investing in the infrastructure of activation systems

The crisis risks leaving deep scars on those who lost their jobs at the beginning of the pandemic, and in particular groups in vulnerable situations marginally attached to the labour market who face major or multiple employment obstacles (such as single parents with young children, people with disabilities, youth not in employment nor in education or training, discouraged workers, the long term unemployed and qualified under-employed migrants). These groups are often left outside the scope of active labour market policies (ALMPs). There are also workers who are at risk of losing jobs as shifts in employment occur during the recovery or were forced to move into precarious work during the pandemic. Where this is the case, ALMPs should be expanded to provide these people in vulnerable situations with integrated, comprehensive and individualised support in order to reconnect them with good opportunities in the labour market.

More generally, ALMPs play a crucial role in fostering the resilience of a labour market in transformation. The COVID-19 crisis, by increasing caseload while generating a slump in job vacancies, has posed a significant challenge to public and private employment services. About two-thirds of OECD countries, and 60 percent at global level (ILO, Forthcoming), have increased their budget for public employment services since the onset of the crisis (OECD, 2021). But increasing spending may not suffice. Among the countries that were more effective in responding to these challenges are those where the infrastructure to ensure quality employment and training services was already up and running. Building this infrastructure indeed takes time and will require medium-term planning. It will also require harnessing the potential of digital technologies to better identify and match the skill needs by firms and skill sets of workers, and to develop appropriate profiling and segmentation tools, without leaving the most difficult clients unserved. Better labour market intelligence and professionalization of both digital and face to face career development support are crucial. Many countries have made substantial progress in this respect, also in the past and current year, but additional investments in digital capacity, efficient internal processes and financing of ALMPs are still necessary in many of them.

Investing in reducing gaps in social protection

Going forward, countries should take the opportunities to reinforce their social protection systems to make sure that they adequately and comprehensively protect workers in all types of employment, including temporary, part-time and self-employment (ILO, ISSA and OECD, 2021a). This includes measures to extend coverage to those who are not adequately protected, building on the innovations developed during the COVID-19 crisis and ensuring that social protection systems can adequately support a just transition to a greener economy and society (ILO, 2021b).

In the last decades, some forms of employment, such as on-call or zero-hours contracts, as well as various forms of own-account work, have grown in many countries (OECD, 2019). Yet, significant gaps in the access to social protection exist between workers in full-time, open-ended contracts and those in these forms of part-time or temporary employment. In addition, the self-employed are usually less well covered by statutory social protection provisions. Many workers in such forms of employment (e.g. temporary, on-call and intermittent contracts) (ILO, ISSA and OECD, 2021a) (ILO, ISSA and OECD, 2021b), while being equally covered in principle, still struggle to gain effective access, because they fail to meet minimum contribution periods or earnings (OECD, 2020; ILO, 2016). For this reason, they also remain out of the radar of ALMPs, which makes their job search after job loss more difficult. Addressing gaps in social protection, should be a priority in the coming years.

In certain cases gaps emerge simply because of misclassification, that is working arrangements are essentially the same as those of employees but individuals are declared as self-employed by their de facto employer to circumvent regulations and avoid taxes and unionisation. Cracking down on false self-employment often requires to clarify existing regulations and enforce them better by strengthening the capacity of labour inspectorates and the penalties for non-compliance as well as making it easier for individuals to challenge their employment status (OECD, 2019; ILO and OECD, 2020). At the same time, working towards overcoming barriers to coverage for categories of other workers that are often inadequately covered, such as domestic workers, agricultural workers or workers in the cultural and creative sector, through adapted mechanisms can also support the objective of adequately and sustainably protecting workers in all forms of employment (ILO, 2021i; ILO, 2021l; ILO, 2021m; ILO, 2021n; ILO, 2021o).

But addressing misclassification by improving regulatory enforcement is unlikely to be sufficient in most cases: proactive action is needed to boost the portability of entitlements between social insurance schemes that are intended for different labour market groups and reduce fragmentation in social protection systems; extend coverage to include those categories of workers who are currently inadequately covered; ensure a more neutral treatment of different forms of work to prevent arbitrage between them; review and adjust eligibility criteria in social insurance with regard to minimum contribution and employment periods and hours of work; facilitate access and simplify administrative procedures; ensure and make means tests more responsive to people’s needs by changing the reference periods for the needs assessment and putting appropriate weight on recent or current incomes of all family members. Many countries put in place emergency support for the self-employed after the outbreak of the COVID-19 crisis, temporarily filling a few of these gaps, but that experience should now be re-assessed and translated into a more systematic structural response, capable of ensuring fairness and restoring incentives (ILO, ISSA and OECD, 2021a; ILO, 2021).

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