

The Impact on the Labor Market in the COVID-19 Pandemic and How to Respond

December 14, 2020

Dr. Hisashi Yamada

(Japan Research Institute)

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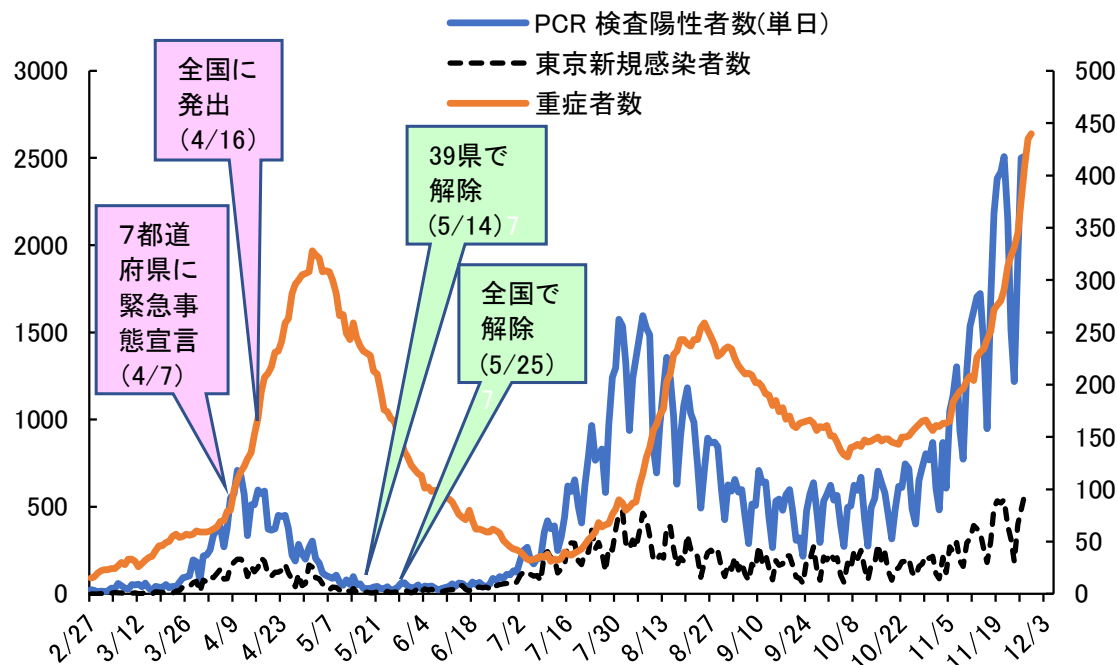
(Japan Research Institute)

1. Impact of the Pandemic on the Economy and Employment

(1) Forecast of Spread of Infections

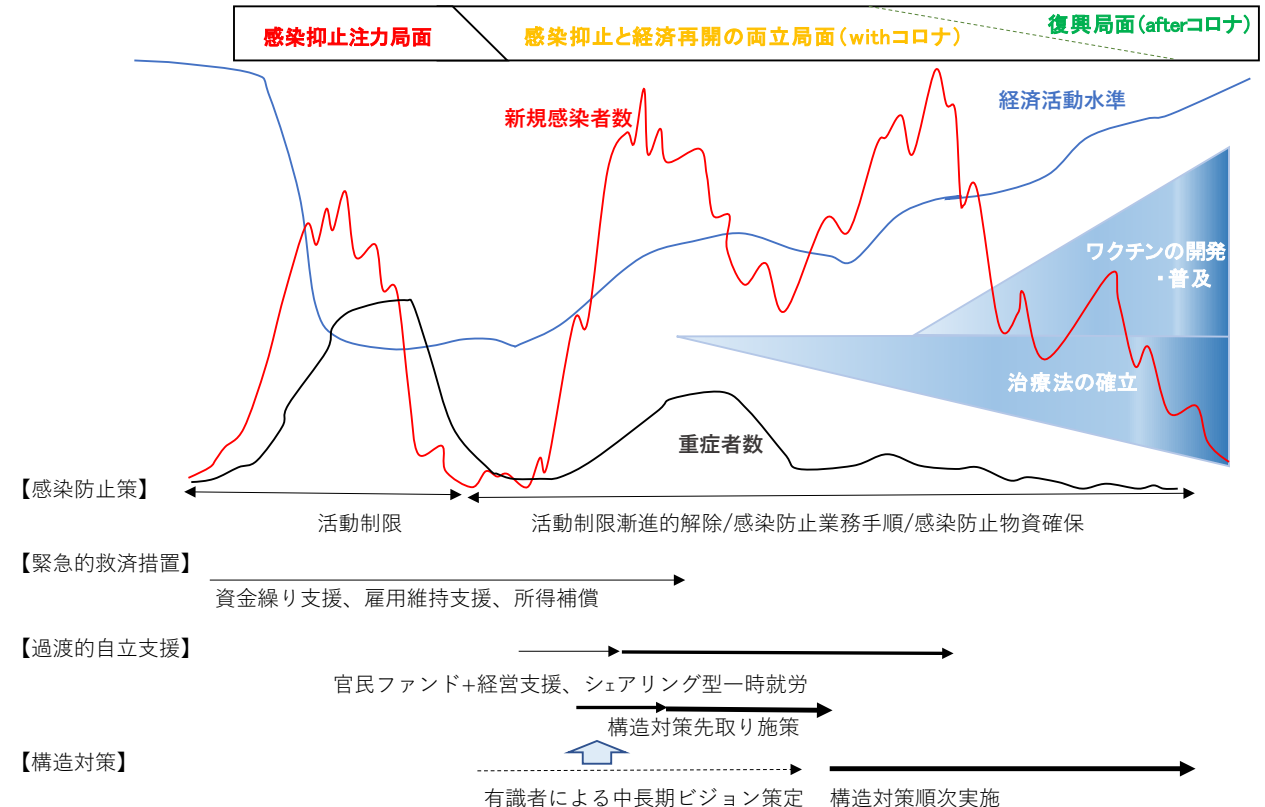
- The state of emergency declaration was effective in limiting movement, putting a stop to the first wave of infection and preventing a collapse of the healthcare system.
- In the second wave in summer, the number of critical patients was low compared to the increase in the number of confirmed infections. This is thought to be because we have begun to work out how to deal with COVID-19, **but leaving infections to spread will lead to a collapse of the healthcare system.** The current third wave has more critical patients than there were in the first wave.
- Although vaccines are being developed in the UK and US, how long they will be effective and what side effects they will have are still unknown. As it will take time before a majority of people can be vaccinated, it is expected **measures to prevent infection will be necessary for the next six months or more.**

(Figure 1-1) Infections in Japan



(資料)厚生労働省(<https://www.mhlw.go.jp/stf/covid-19/open-data.html>)
 NHK(<https://www3.nhk.or.jp/news/special/coronavirus/data/>)
 日本COVID-19対策ECMOnet<https://crisis.ecmonet.jp/>

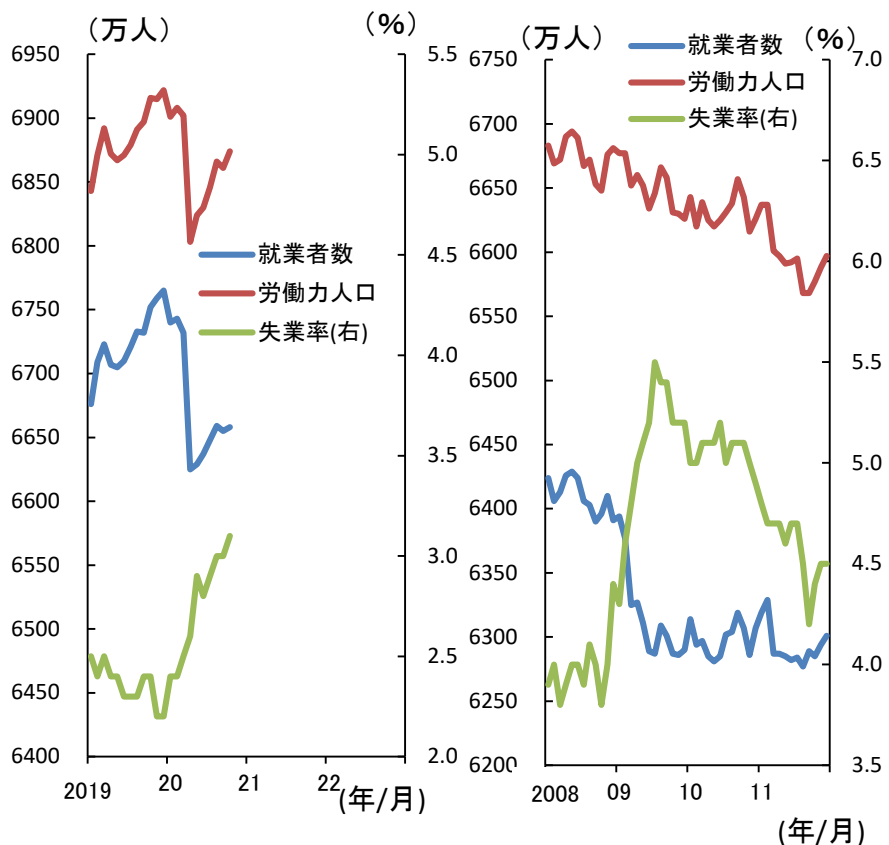
(Figure 1-2) Infections and Economic Activity



(2) Current Employment Conditions

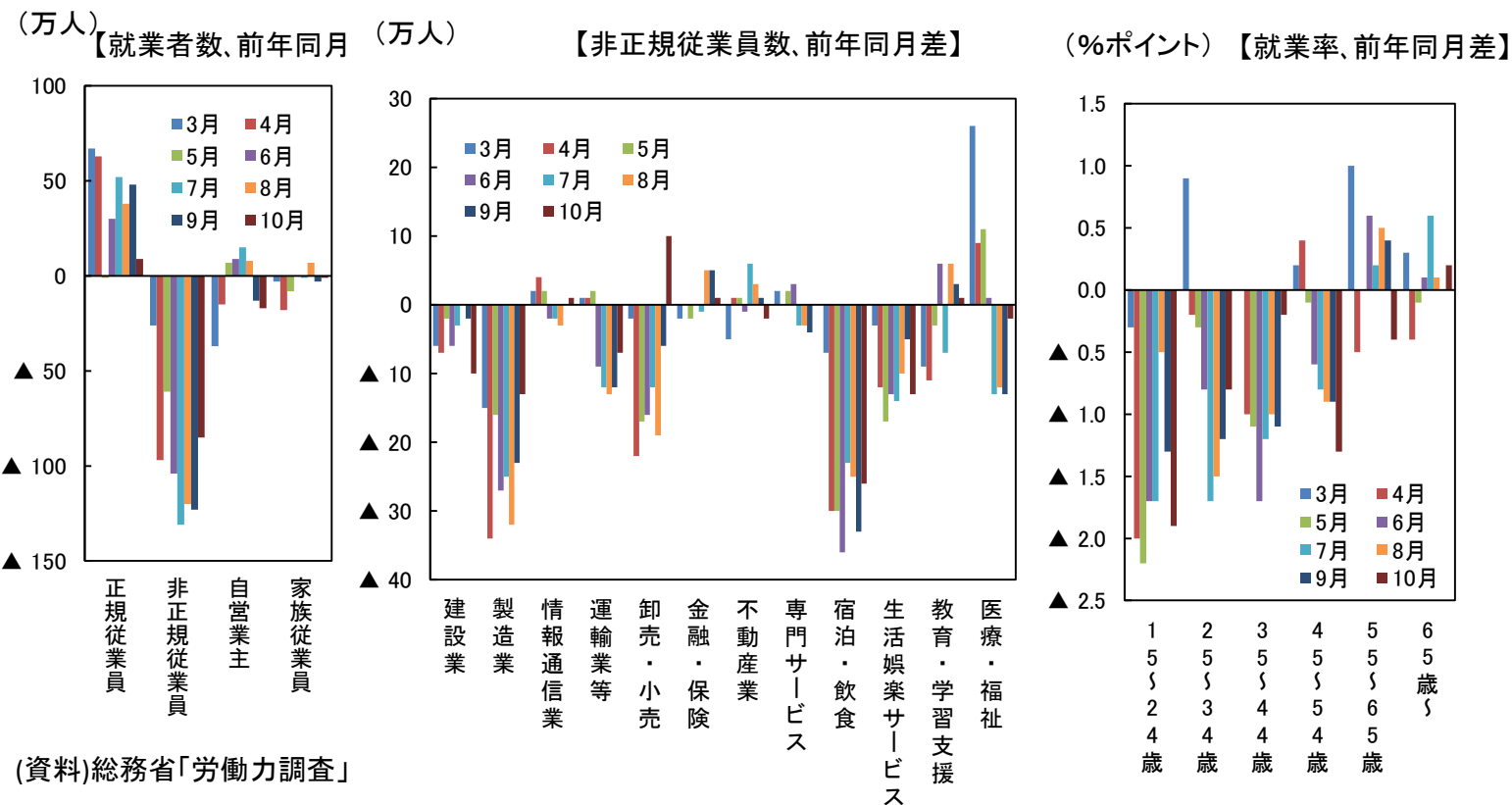
- Although the unemployment rate was low during the state of emergency declaration in April, **the number of employed workers decreased drastically**. The number of employed workers recovered in May onwards, but is still significantly lower than in March.
- There was significant loss of employment among freelance and non-regular workers, but **many left the labor market in April**. From May onwards, they have steadily shifted to being jobless instead.

(Figure 1-3) Unemployment Rate, Employed Workers, Labor Force



(資料)総務省「労働力調査」

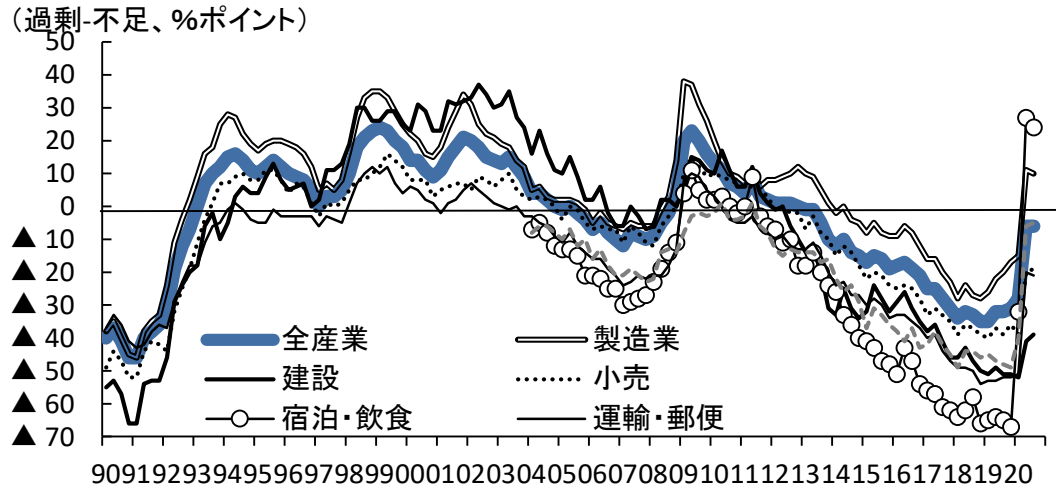
(Figure 1-4) Employed Workers, Employment Rate



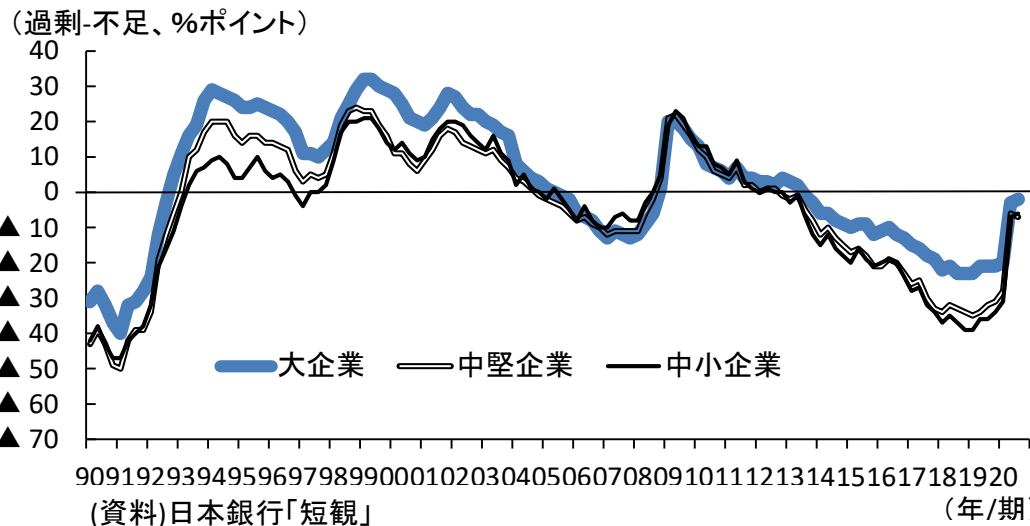
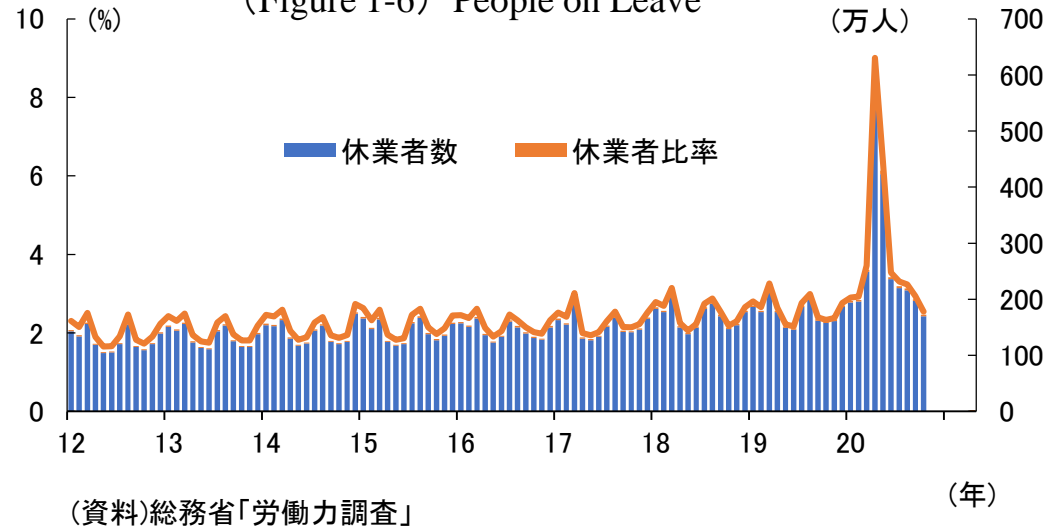
(資料)総務省「労働力調査」

- Companies had a sudden employee surplus, and there were more employees **on leave** than ever before. The employment adjustment subsidy helped maintain employment and prevent the unemployment rate from rising.
- After the state of emergency declaration was lifted, the number of people on leave decreased as the economy recovered. However, **the number of job openings shrank at an unprecedented pace**, and with the future still unclear they remain low. **Mismatches in the job market could hinder employment numbers from improving.**

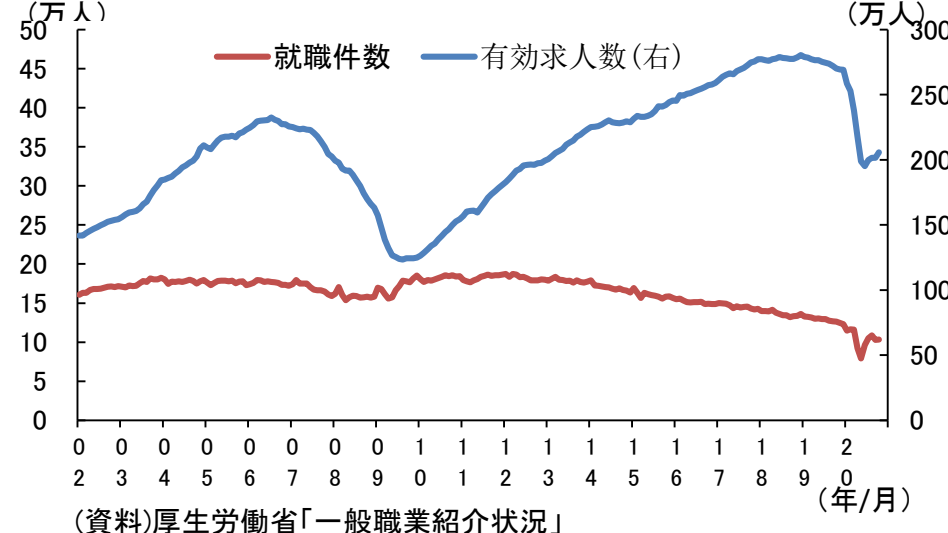
(Figure 1-5) BoJ Short-term Survey: Number of Employees DI



(Figure 1-6) People on Leave



(Figure 1-7) Available Jobs, Successful Employment

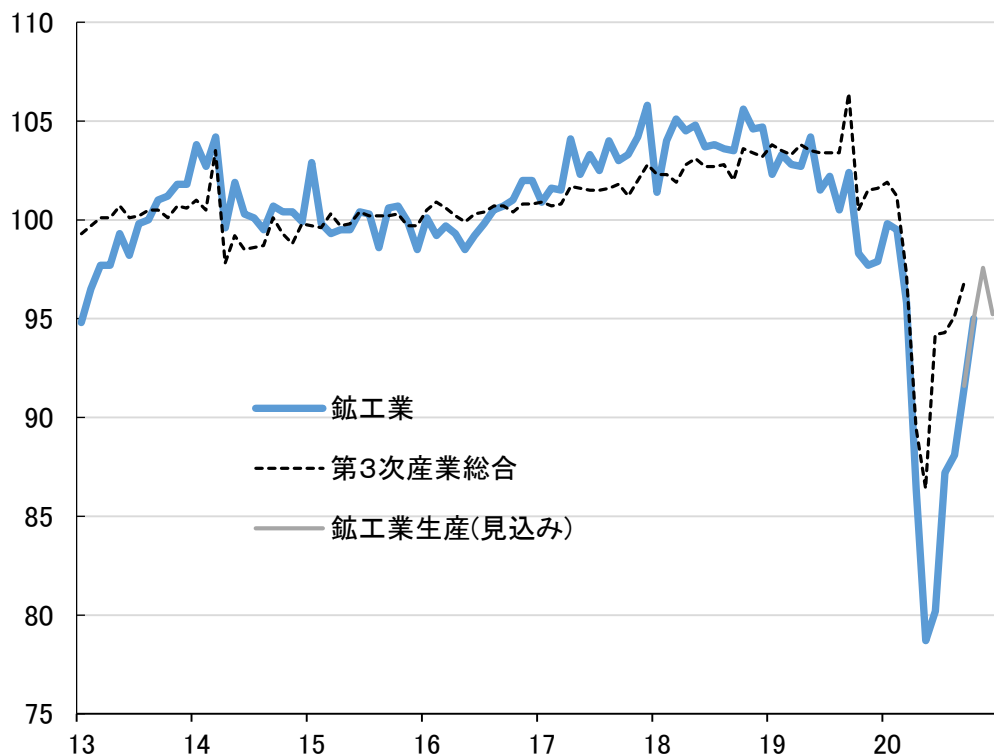


(3) Future Outlook

- Economic activity levels have not returned to former levels even after lifting the state of emergency declaration. With the impact of the third wave of infections as well, the **90% economy** or **95% economy** (*The Economist*) will continue for the time being.
- A large GDP gap remains, and deflation trends will continue.

(Figure 1-8) Japanese Production Indexes

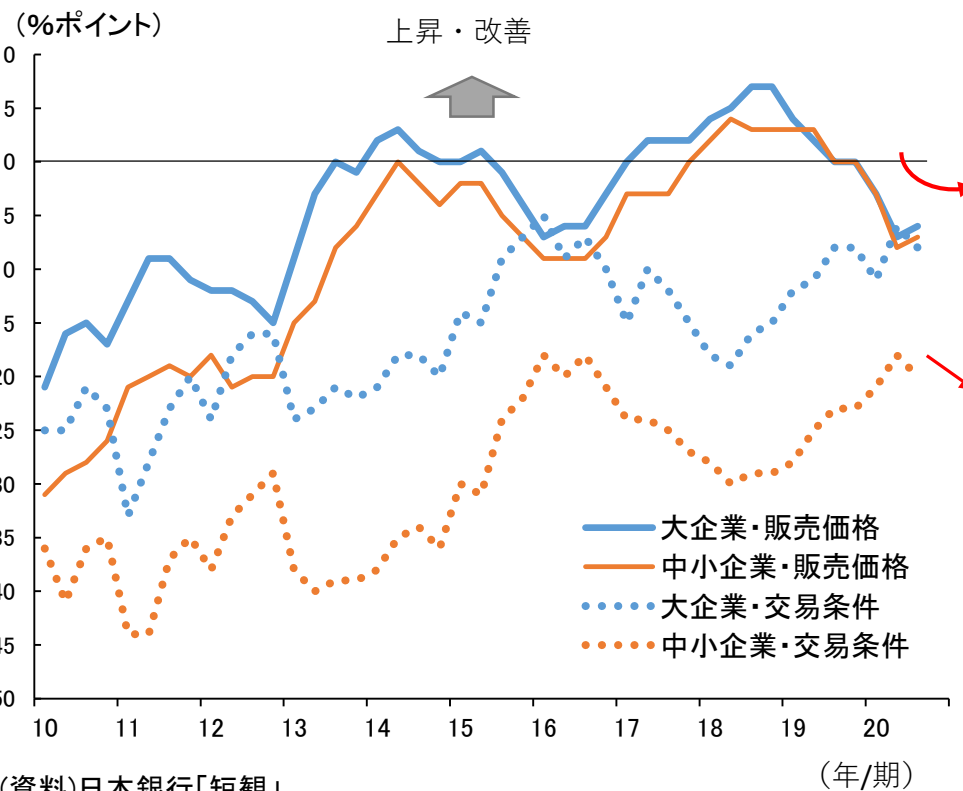
(2015年 = 100)



(資料)経済産業省ホームページ

(年/月)

(Figure 1-9) Selling Prices, Market Conditions (BoJ Short-term Survey)



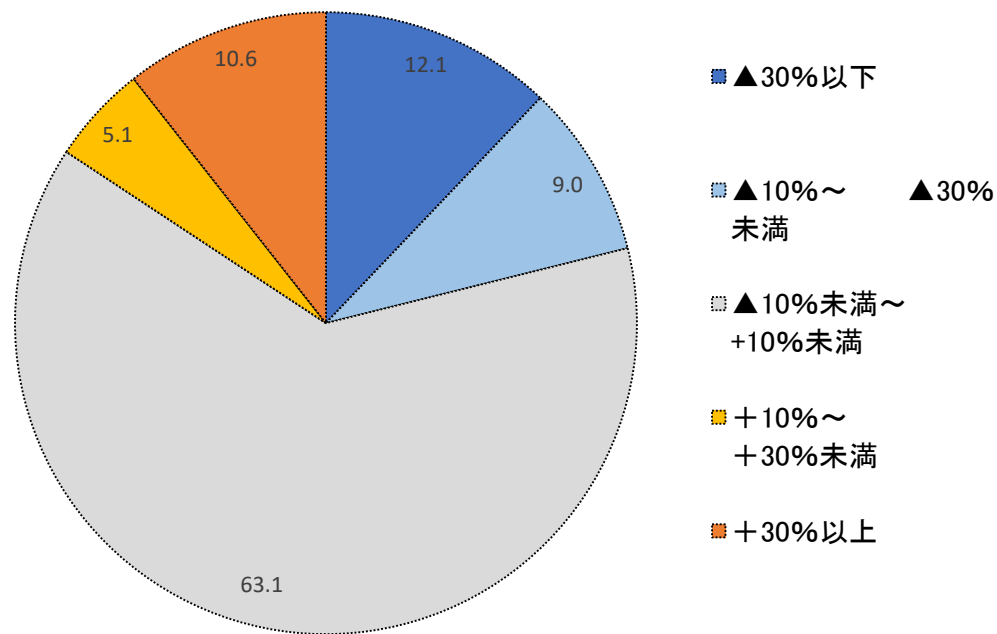
(資料)日本銀行「短観」

(注)交易条件は販売判断DI-仕入判断DI

(年/期)

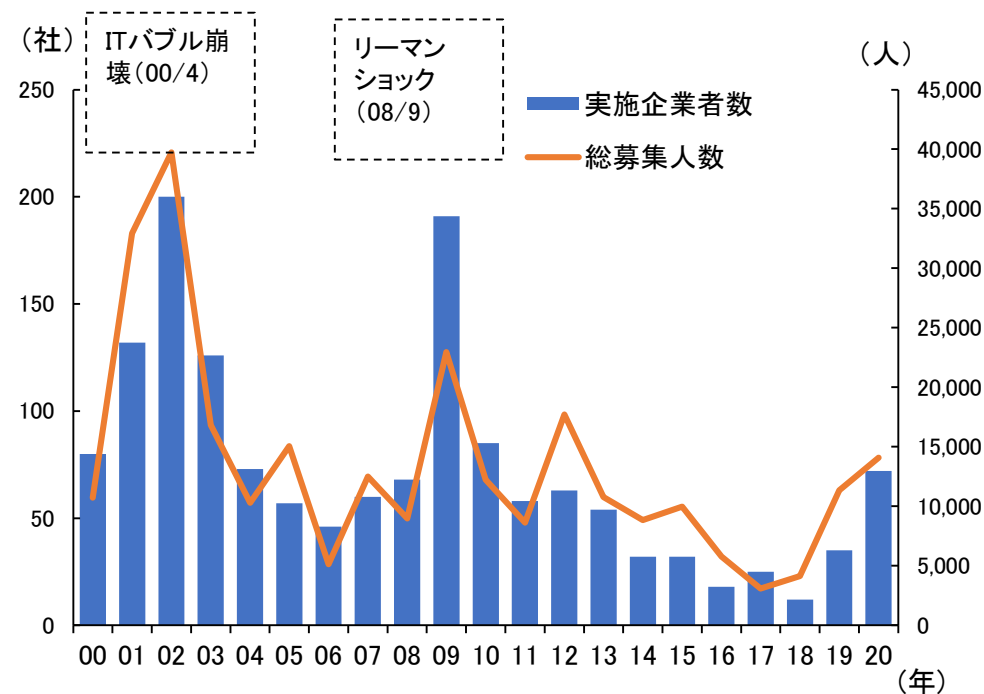
- If the labor share remains high in the 90% or 95% economy, **further increase of the unemployment rate in the future** will be unavoidable.
- At the end of the fiscal year, large companies will make efforts to be profitable, and in addition to a move to reduce employee numbers and freeze hiring, the burden for cutting costs might be placed on SMEs who have less bargaining power. There are also concerns about the negative impact of the third wave of infections on the individual service industry.
- Based on previous patterns, hiring of new graduates generally drops during recessions, and there are signs of that this time as well. Calls for early retirement and voluntary redundancy have also begun increasing, which normally increase the year after the economic crisis in past patterns.

(Figure 1-10) Change in Numbers Compared to Previous Year of Planned Hiring of New Graduates in 2022 (September 2020)



(資料)就職みらい研究所「新卒採用に関する調査」

(Figure 1-11) Requests for Voluntary Redundancy/Early Retirement at Major Listed Companies

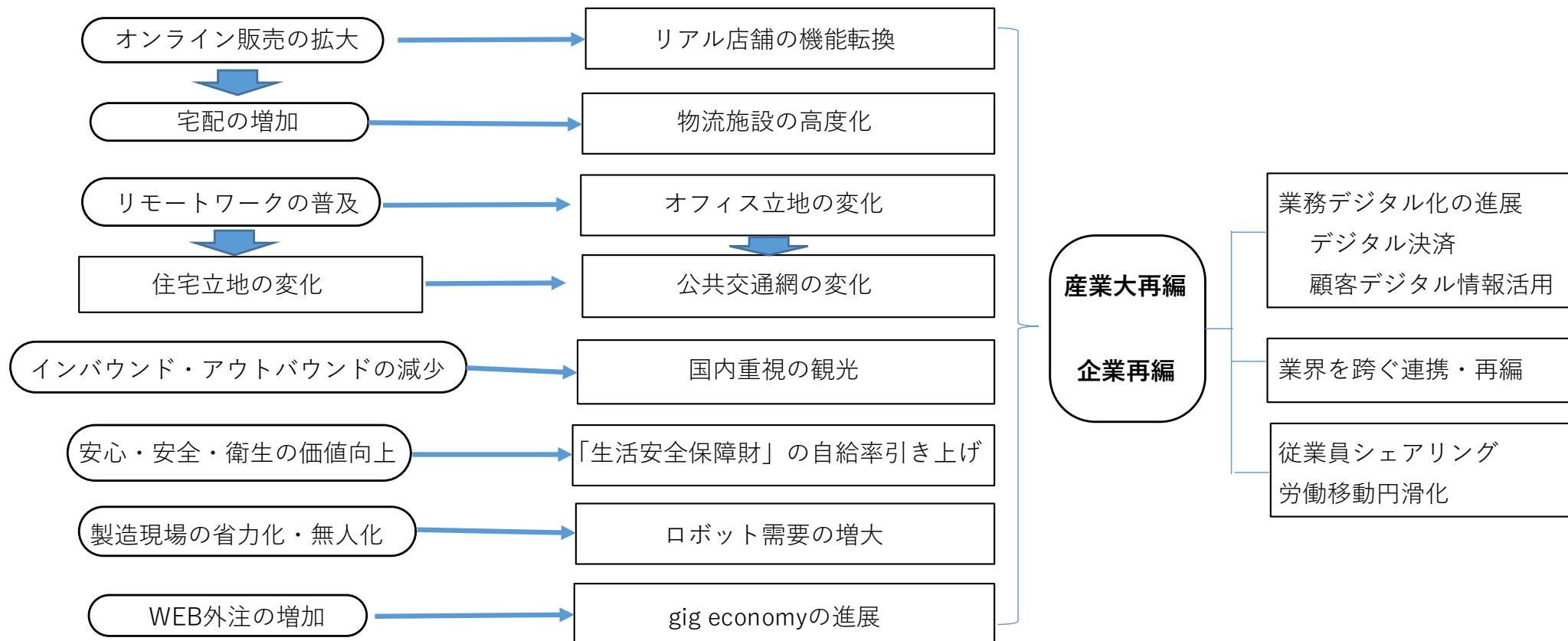


(資料)東京商工リサーチ (注)2020年は1-10月累計。

2. Structural Changes Being Accelerated by the Pandemic

- **The pandemic is accelerating structural changes to the economy and society.**
- One of the main trends is businesses moving online and the digitalization of work flow. Offline work will not simply be replaced, it will become more sophisticated and have its functions change.
- As a result, there will be increased changes to business models and business restructuring. Whether these will be successful or not will depend on **labor mobility** and **skill transfer**.

(Figure 2-1) Predicted Post-Corona Changes to Socio-Economic Structure



• Although there is a risk of significant loss of employment, it is important to note there is **major variation depending on the industry**.

• In addition to the serious labor shortage in healthcare, there is **steady labor demand for delivery and retail (supermarkets, drug stores)**. There is **growing demand in the information services sector**, and there is also a labor shortage in agriculture and fishing which have stopped bringing in foreign laborers. 。

(Figure 2-2) Tertiary Industry Activity by Sector (compared to the same month the previous year)

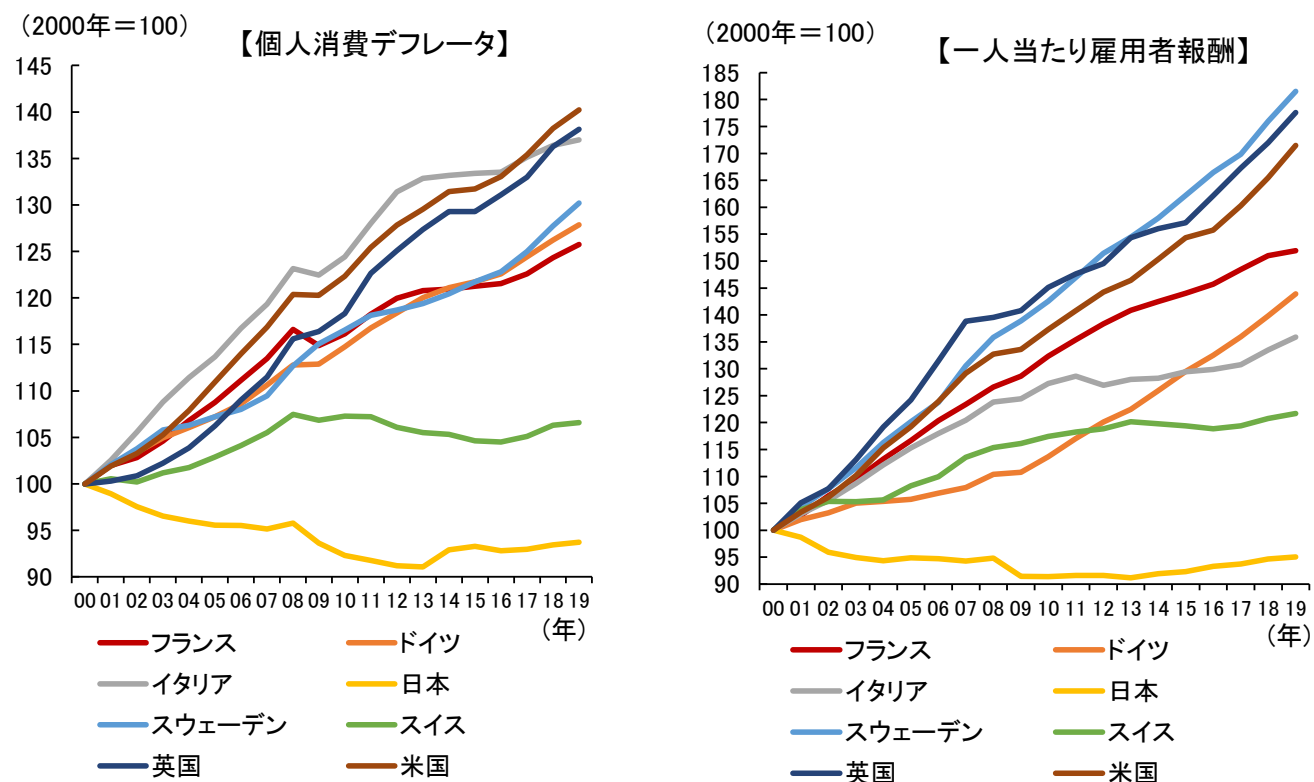
| 品目名称 | 2020年 | | | | | | | |
|-----------------------|--------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | 2月 | 3月 | 4月 | 5月 | 6月 | 7月 | 8月 | 9月 |
| 第3次産業総合 | ▲ 1.1 | ▲ 5.4 | ▲ 13.5 | ▲ 17.4 | ▲ 8.3 | ▲ 8.9 | ▲ 8.5 | ▲ 9.0 |
| 電気・ガス・熱供給・水道業 | 1.0 | ▲ 1.5 | ▲ 3.0 | ▲ 8.1 | ▲ 3.0 | ▲ 5.8 | 0.6 | ▲ 2.7 |
| 情報通信業 | ▲ 0.4 | 1.0 | 0.2 | ▲ 7.8 | ▲ 4.4 | ▲ 2.8 | ▲ 6.0 | ▲ 7.8 |
| 通信業 | ▲ 0.4 | 0.1 | ▲ 2.1 | ▲ 5.1 | ▲ 1.4 | 0.9 | ▲ 1.6 | ▲ 3.4 |
| 放送業 | ▲ 4.5 | ▲ 8.3 | ▲ 14.1 | ▲ 16.3 | ▲ 17.2 | ▲ 14.0 | ▲ 9.9 | ▲ 9.2 |
| 情報サービス業 | 1.5 | 4.0 | 11.7 | ▲ 6.6 | ▲ 1.7 | ▲ 0.8 | ▲ 7.6 | ▲ 10.7 |
| ソフトウェア業 | 2.2 | 3.2 | 22.2 | ▲ 5.3 | ▲ 0.7 | 2.1 | ▲ 3.8 | ▲ 11.3 |
| 受注ソフトウェア | 0.0 | ▲ 3.7 | ▲ 2.4 | ▲ 8.9 | ▲ 6.2 | ▲ 6.2 | ▲ 5.8 | ▲ 14.6 |
| ソフトウェアプロダクト | 9.6 | 33.5 | 86.8 | 6.3 | 20.2 | 24.7 | 1.7 | 0.9 |
| ゲームソフト | 12.4 | 86.1 | 177.6 | 16.1 | 28.3 | 42.9 | 6.4 | 10.1 |
| ソフトウェアプロダクト(除くゲームソフト) | 7.3 | 11.1 | 39.0 | ▲ 1.0 | 16.0 | 9.4 | ▲ 3.1 | ▲ 6.4 |
| 情報処理・提供サービス業 | 0.3 | 5.5 | 0.1 | ▲ 8.3 | ▲ 3.3 | ▲ 4.6 | ▲ 12.6 | ▲ 9.5 |
| インターネット附随サービス業 | 2.4 | 1.1 | 1.3 | 2.2 | 5.7 | 9.2 | 6.5 | 3.2 |
| 映像・音声・文字情報制作業 | ▲ 5.7 | ▲ 9.4 | ▲ 18.8 | ▲ 19.7 | ▲ 21.7 | ▲ 18.1 | ▲ 16.4 | ▲ 10.6 |
| 運輸業、郵便業 | ▲ 2.0 | ▲ 8.5 | ▲ 20.0 | ▲ 26.0 | ▲ 14.8 | ▲ 16.1 | ▲ 15.4 | ▲ 14.4 |
| 宅配貨物運送業 | 2.9 | 5.4 | 10.6 | 14.3 | 17.7 | 8.2 | 12.4 | 7.9 |
| 郵便業(信書便事業を含む) | ▲ 0.5 | ▲ 7.6 | ▲ 13.7 | ▲ 9.4 | ▲ 1.3 | ▲ 10.4 | ▲ 11.7 | ▲ 8.1 |
| 旅客運送業 | ▲ 2.6 | ▲ 24.2 | ▲ 46.2 | ▲ 53.4 | ▲ 36.2 | ▲ 32.4 | ▲ 33.5 | ▲ 31.0 |
| 貨物運送業 | ▲ 2.5 | 0.0 | ▲ 2.6 | ▲ 8.5 | ▲ 1.8 | ▲ 6.9 | ▲ 3.5 | ▲ 5.9 |
| 卸売業 | ▲ 6.4 | ▲ 6.1 | ▲ 13.9 | ▲ 21.5 | ▲ 14.2 | ▲ 14.5 | ▲ 14.7 | ▲ 13.5 |
| 金融業、保険業 | ▲ 0.9 | 2.3 | 0.6 | ▲ 10.3 | 4.0 | 0.4 | 0.1 | 0.8 |
| 物品賃貸業(自動車賃貸業を含む) | 2.1 | 0.5 | ▲ 1.9 | ▲ 4.5 | ▲ 2.5 | ▲ 3.4 | ▲ 3.8 | ▲ 4.2 |
| 事業者向け関連サービス | ▲ 2.0 | ▲ 2.1 | ▲ 5.2 | ▲ 11.2 | ▲ 5.9 | ▲ 7.9 | ▲ 6.2 | ▲ 7.7 |
| 小売業 | 0.2 | ▲ 5.5 | ▲ 14.7 | ▲ 12.7 | ▲ 1.7 | ▲ 4.2 | ▲ 3.4 | ▲ 10.6 |
| 各種商品小売業 | ▲ 5.9 | ▲ 21.1 | ▲ 43.3 | ▲ 35.7 | ▲ 11.6 | ▲ 12.9 | ▲ 13.2 | ▲ 24.9 |
| 織物・衣服・身の回り品小売業 | ▲ 5.2 | ▲ 24.3 | ▲ 54.8 | ▲ 36.0 | ▲ 8.0 | ▲ 20.5 | ▲ 19.0 | ▲ 25.1 |
| 飲食料品小売業 | 2.8 | 1.5 | 1.2 | 3.0 | 4.4 | 2.7 | 2.5 | 2.6 |
| 自動車小売業 | ▲ 3.1 | ▲ 3.4 | ▲ 25.1 | ▲ 36.4 | ▲ 18.5 | ▲ 17.5 | ▲ 15.5 | ▲ 18.0 |
| 機械器具小売業 | 1.6 | ▲ 7.7 | ▲ 13.6 | ▲ 6.1 | 13.2 | 3.6 | 0.9 | ▲ 26.8 |
| 燃料小売業 | ▲ 1.7 | ▲ 7.1 | ▲ 15.2 | ▲ 16.7 | ▲ 4.2 | ▲ 4.3 | ▲ 1.1 | ▲ 3.5 |
| その他の小売業(別掲を除く住関連) | 2.8 | ▲ 2.6 | ▲ 5.8 | ▲ 6.1 | 1.7 | 1.0 | 0.7 | ▲ 8.5 |
| 医薬品・化粧品小売業 | 8.3 | 0.5 | 1.5 | ▲ 5.1 | 1.4 | ▲ 0.4 | 0.4 | ▲ 8.2 |
| その他小売業 | ▲ 1.5 | ▲ 4.9 | ▲ 11.1 | ▲ 6.7 | 1.9 | 2.1 | 0.9 | ▲ 8.7 |
| 不動産業 | 0.2 | ▲ 1.2 | ▲ 6.4 | ▲ 4.2 | ▲ 0.8 | ▲ 0.6 | 2.6 | 0.1 |
| 医療、福祉 | 1.9 | ▲ 2.2 | ▲ 9.3 | ▲ 12.1 | ▲ 3.4 | ▲ 4.9 | ▲ 3.2 | ▲ 2.6 |
| 生活娯楽関連サービス | ▲ 2.0 | ▲ 27.9 | ▲ 51.6 | ▲ 48.9 | ▲ 32.8 | ▲ 27.7 | ▲ 27.9 | ▲ 24.5 |
| 宿泊業 | ▲ 6.7 | ▲ 49.3 | ▲ 79.4 | ▲ 83.7 | ▲ 65.9 | ▲ 53.2 | ▲ 54.6 | ▲ 40.8 |
| 飲食店、飲食サービス業 | ▲ 0.6 | ▲ 26.1 | ▲ 58.2 | ▲ 52.6 | ▲ 30.6 | ▲ 25.7 | ▲ 28.1 | ▲ 23.5 |
| 食堂、レストラン、専門店 | 0.2 | ▲ 24.1 | ▲ 61.9 | ▲ 52.1 | ▲ 28.8 | ▲ 24.6 | ▲ 26.6 | ▲ 21.3 |
| パブレストラン、居酒屋 | ▲ 7.3 | ▲ 44.2 | ▲ 91.5 | ▲ 90.1 | ▲ 60.6 | ▲ 53.3 | ▲ 59.4 | ▲ 49.3 |
| 喫茶店 | ▲ 3.0 | ▲ 25.8 | ▲ 72.8 | ▲ 67.2 | ▲ 38.5 | ▲ 34.0 | ▲ 32.7 | ▲ 28.1 |
| ファーストフード店 | 9.3 | ▲ 7.2 | ▲ 15.9 | ▲ 9.4 | ▲ 12.0 | ▲ 3.9 | ▲ 3.7 | ▲ 4.8 |
| 飲食サービス業 | 0.3 | ▲ 21.5 | ▲ 25.7 | ▲ 29.7 | ▲ 14.2 | ▲ 9.3 | ▲ 12.5 | ▲ 15.0 |
| 洗濯・理容・美容・浴場業 | ▲ 3.5 | ▲ 26.1 | ▲ 47.0 | ▲ 29.5 | ▲ 22.6 | ▲ 23.7 | ▲ 22.7 | ▲ 21.5 |
| その他の生活関連サービス業 | ▲ 8.5 | ▲ 38.3 | ▲ 61.0 | ▲ 65.5 | ▲ 60.6 | ▲ 51.6 | ▲ 41.5 | ▲ 43.2 |
| 旅行業 | ▲ 15.8 | ▲ 69.6 | ▲ 94.9 | ▲ 97.3 | ▲ 91.4 | ▲ 84.8 | ▲ 79.7 | ▲ 68.4 |
| 冠婚葬祭業 | 2.5 | ▲ 16.0 | ▲ 33.3 | ▲ 39.3 | ▲ 37.5 | ▲ 27.3 | ▲ 16.4 | ▲ 26.7 |
| 娯楽業 | 1.0 | ▲ 33.0 | ▲ 57.4 | ▲ 59.4 | ▲ 35.0 | ▲ 27.4 | ▲ 26.4 | ▲ 25.7 |
| 学習支援業 | ▲ 1.6 | ▲ 4.5 | ▲ 8.6 | ▲ 8.9 | ▲ 7.5 | ▲ 8.8 | ▲ 7.5 | ▲ 6.7 |

(資料)経済産業省「第3次産業活動指数」

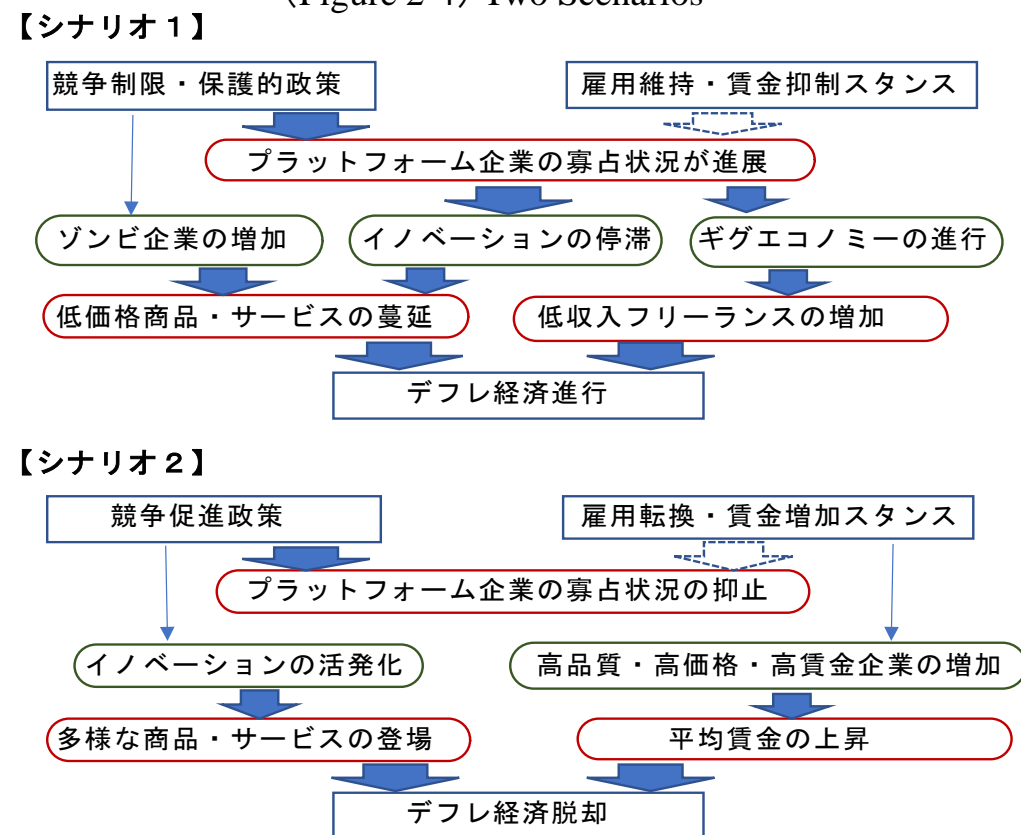
<Post-Corona Increase in Domestic Demand>

- The slowdown in people crossing borders has also slowed the globalization of trade. With supply chains having been cut off, there has been a trend of returning to domestic production. There will also be reduced growth worldwide for some time after the pandemic as liabilities are paid off. As a result, **there will be little hope for international demand, and growth led by domestic demand will be necessary.**
- For growth in domestic demand while the population is declining, the only option will be to pursue **growth through quality rather than quantity**, and it will be necessary to pursue businesses operating with **high quality, high prices, and high wages**. However, if the current competition policies and labor market structure are used, there is concern that the economy will fall into long-term stagnation and deflation, with a limited number of oligopolistic companies and large numbers of zombie companies.

(Figure 2-3) Commodity Prices and Wages in Developed Countries



(Figure 2-4) Two Scenarios

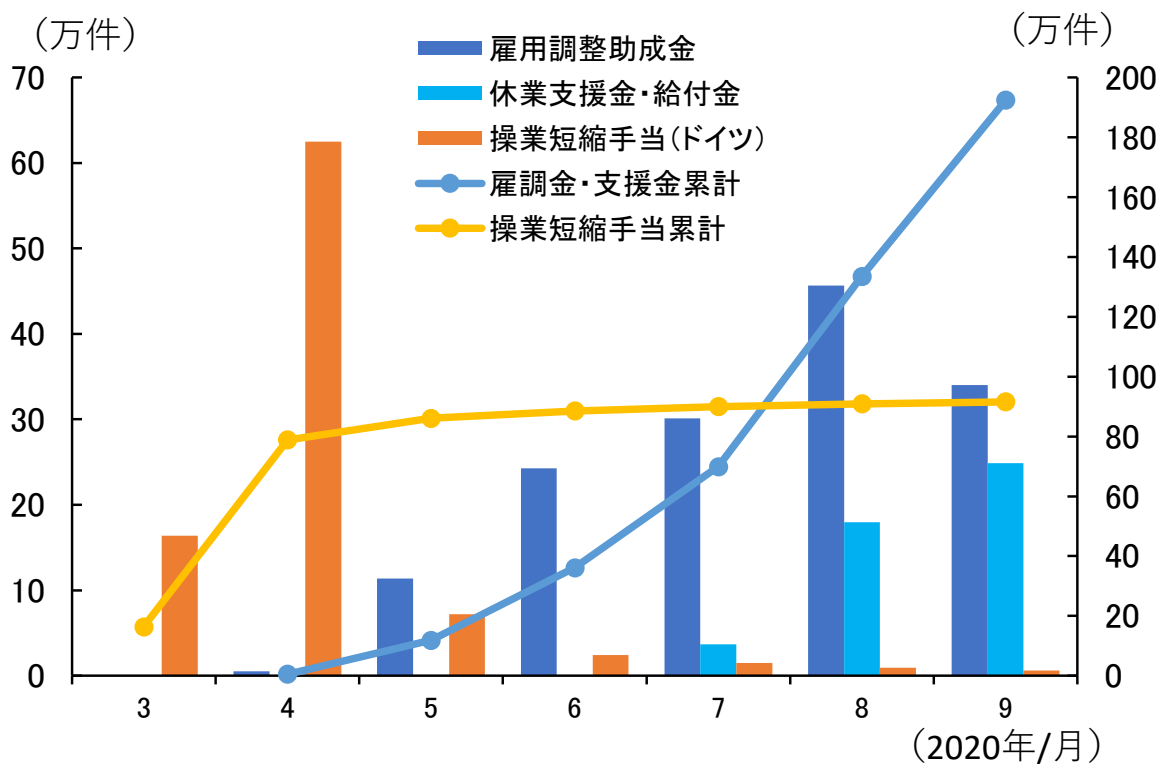


3. How to Respond

<Employment Adjustment Subsidy Issues and Limits as a System>

- ◆ The government quickly introduced the special measure of employment adjustment subsidies and actively used them.
- ◆ However, they were slower than Germany, which introduced a similar system. This is due to the large amount of paperwork and being behind in digitalization. Fundamentally, a difference between ex ante regulation and ex post regulation.

(図表3-1) 雇用維持施策の日独比較



(資料) JILPTホームページ。

(注) 支給申請ベース。雇用調整助成金は感染症の影響に伴う特例。

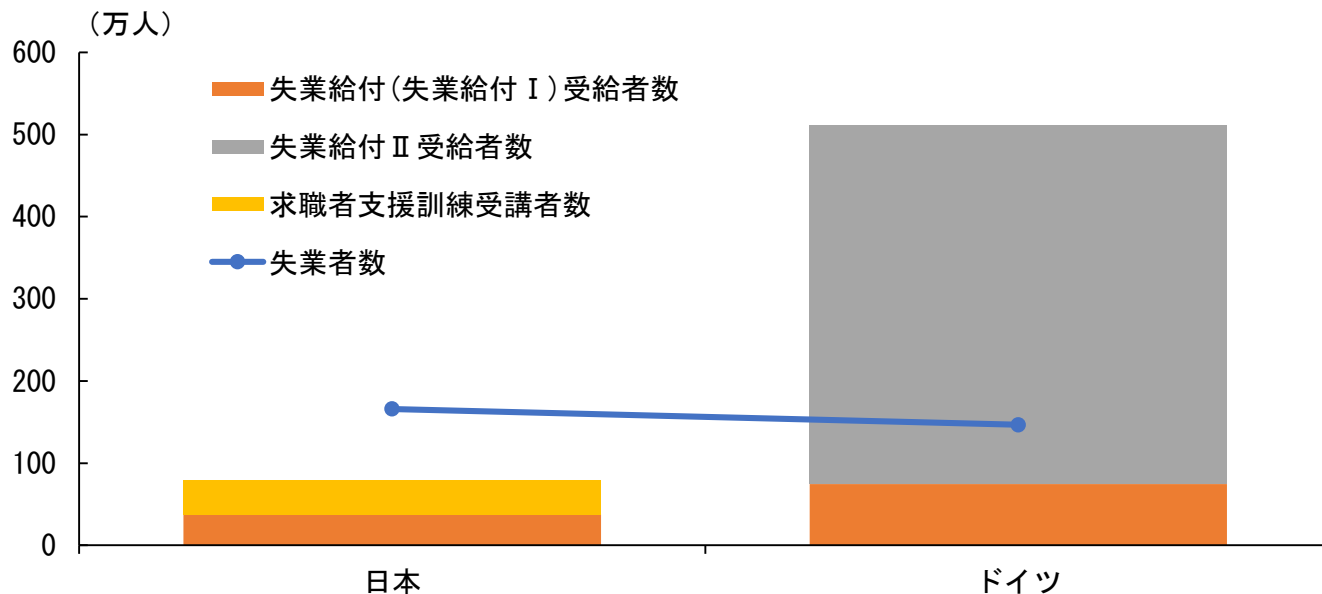
<Structural Issues of Employment Adjustment Subsidy>

A bigger problem with the employment adjustment subsidy is the system itself (an overreliance on the employment adjustment subsidy is the problem).

- Limit ① Many People Cannot Be Helped By It
 - ... Large numbers of non-regular workers have already lost their jobs.
 - Freelance workers are not covered.
 - Although the government is significantly expanding coverage for non-regular workers, its effectiveness is questionable.
- Limit ② Mid- to Long-Term Problems
 - ... Old business and industry structures will be retained.
 - Growth potential of companies and the economy will decline → Low wages and future job loss
 - Currently, while Germany's short-time work benefit has stopped increasing, Japan's subsidies are increasing even more rapidly.

- Using Germany and other countries as inspiration, **the safety net should be reconsidered to cover gaps** such as helping those with long-term unemployment or the self-employed.
- Although Japan combining support for job seekers with job training is ideal, it limits the potential recipients, and a **system separated from job training** is necessary as well. (While keeping in mind that Germany's **unemployment assistance led to longer unemployment** in the past)
- It may be necessary to create a **system using public funds to support the livelihood of people who do not receive employment insurance, as long as they are seeking employment**. At the same time, broadening the scope of employment insurance and creating income insurance for freelancers with some of the burden on outsourcers could also be considered.

(Figure 3-2) Comparing Unemployment Benefit Recipient Numbers in Japan and Germany



(資料) JILPT「データブック国際労働比較」

(注) 2018年値。ただし、ドイツの失業給付I・IIは2017年値。求職者支援訓練受講者数は2011年10月～2019年3月の累計。

【第2の失業保険について】

• ドイツでは、2002年に始まったシュレーダー政権下の労働市場改革(ハルツ改革)において、旧来の「失業手当」と「失業扶助」「社会扶助」が「失業給付I」「失業給付II」に再編。「失業給付I」は労使折半の保険料を基本に旧来の「失業手当」に相当する制度で、「失業給付II」は旧来の「失業扶助(失業手当受給期間終了後の給付)」と「社会扶助」の一部(稼得能力を有する者)を統合して創設(労働政策研究・研修機構(2014)「失業保険制度の国際比較」第3章 ドイツ、調査シリーズNo143)。

• わが国では、リーマンショックを経て「求職者支援制度」が創設。雇用保険を受給できない求職者に対し、訓練を受講する機会を確保するとともに、一定の場合には、訓練期間中に給付金を支給し、ハローワークが中心となってきめ細かな就職支援を行うことにより、その早期の就職を支援(厚生労働省ホームページ)。

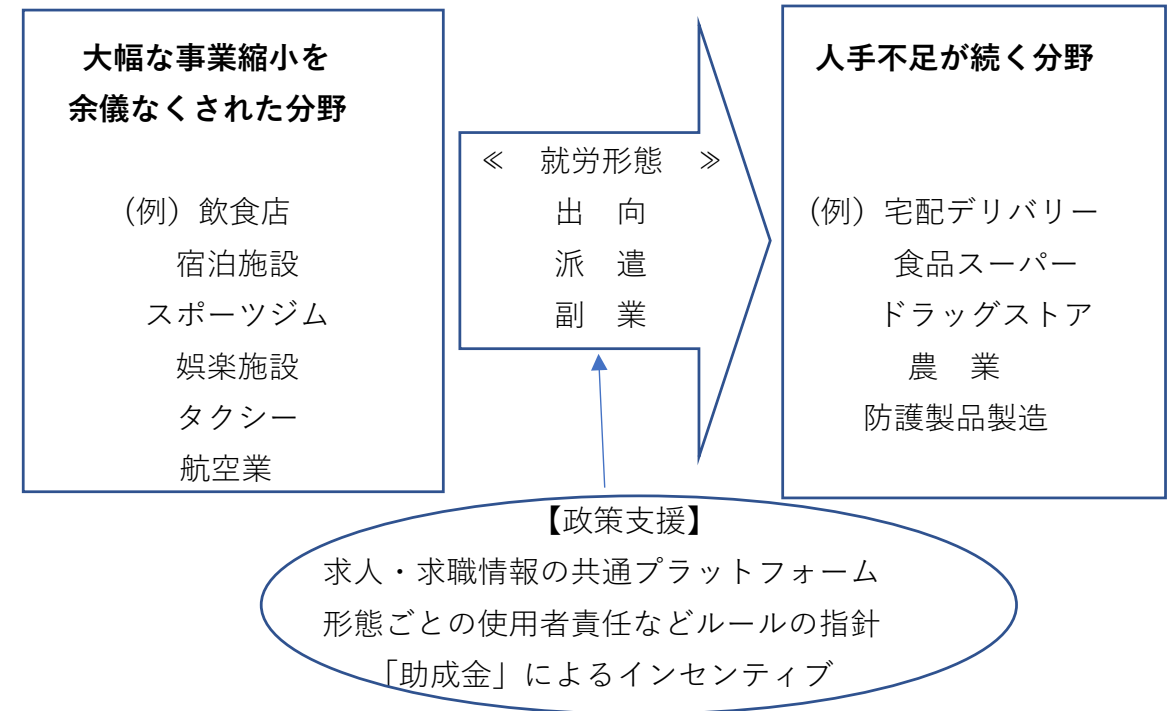
- Temporary work sharing initiatives in the pandemic.
- **A system in which industries with a surplus of workers can “rent” them to industries or businesses with labor shortages, enabling businesses currently suffering to ensure they will have workers available to restart their business after the pandemic, as well as reducing the number of people concerned over losing jobs through a job retention framework.**
- **By promoting this system between different companies and company groups with staff being loaned, temporary workers, and side jobs, in addition to ensuring employment for the time being it could be an opportunity to combine or create businesses after the pandemic, and could be a concept for fluid employment without job loss leading to structural changes in business.**

(Figure 3-3) Examples of Staff Sharing and Collaborations Between Different Industries

| | |
|-------|--|
| 日本航空 | グループ社員約500人をグループ外企業に出向・派遣。ヤマトホールディングス等大手物流会社、自治体、教育機関。農業に派遣。 |
| ANA | 2021/3までに400人以上を出向。期間は半年～2年間。ノジマ、成城石井、KDDI、パソナ、自治体。 |
| 帝国ホテル | 調理師など30-40人を2～3年を出向させる検討。 |
| HIS | 高齢で引退を決めていたそば店主を指南役に迎え、そば店を開業。社員を出向。 |
| JR東日本 | 高給ブドウを特急で運び、百貨店で販売。 |
| 西武鉄道 | 東北地方の農産物を新幹線で運び、都心駅で受け取れるサービス。 |

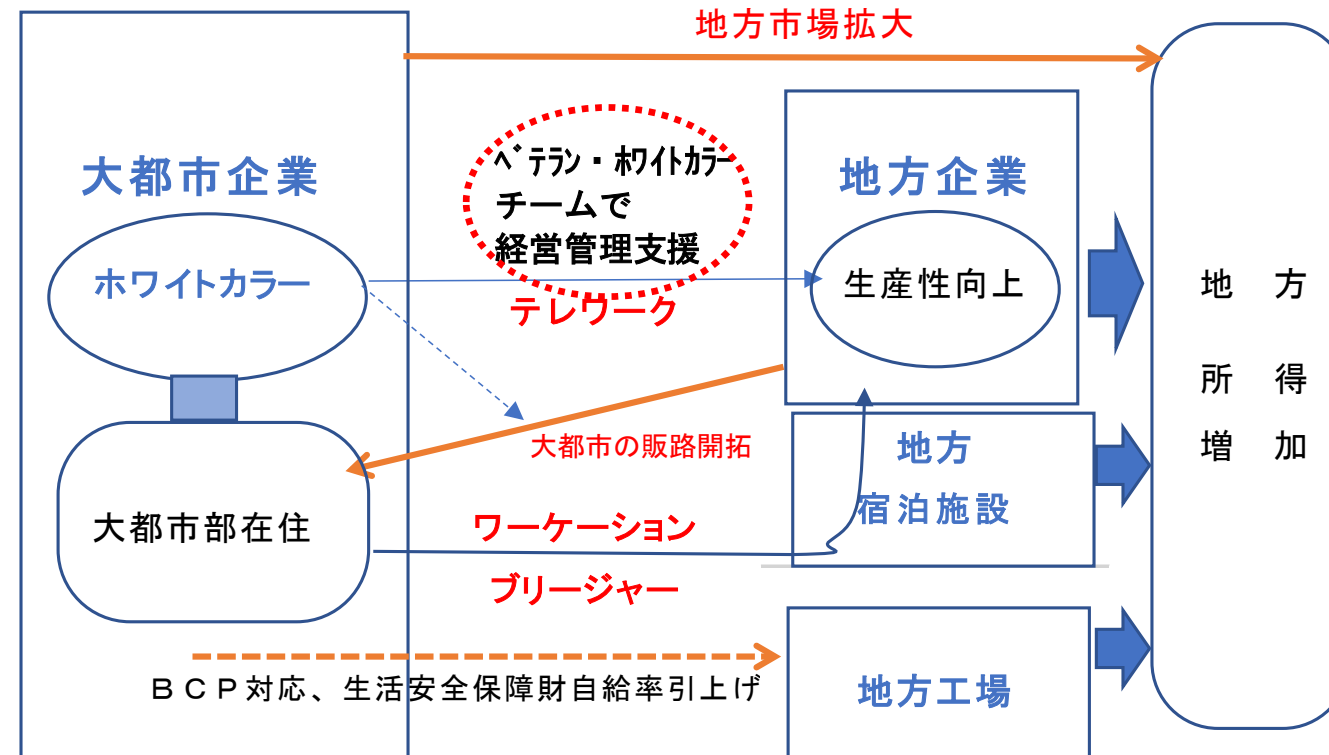
(資料)日本経済新聞(2020.10.30,11.14)、読売新聞(10.29,11.15)、朝日新聞(11.6)

(Figure 3-4) Temporary Work Sharing Framework



- With the adoption of working from home, a system could be made to have **white collar workers from large cities contribute to regional economies through remote work and workations**. As international demand will remain low for some time, **increased collaboration between large cities and regional economies creating a virtuous cycle** could contribute to **growth of domestic demand**.
- Creating new domestic tourism demand to replace inbound tourism and having workers from large cities active in regional companies could help stimulate regional economies, and as regional income grows, there could be increased domestic demand for companies in large cities (new domestic sales channels).

(Figure 3-5) Creating a Positive Cycle and Collaboration Between Large Cities and Regions Using Remote Work

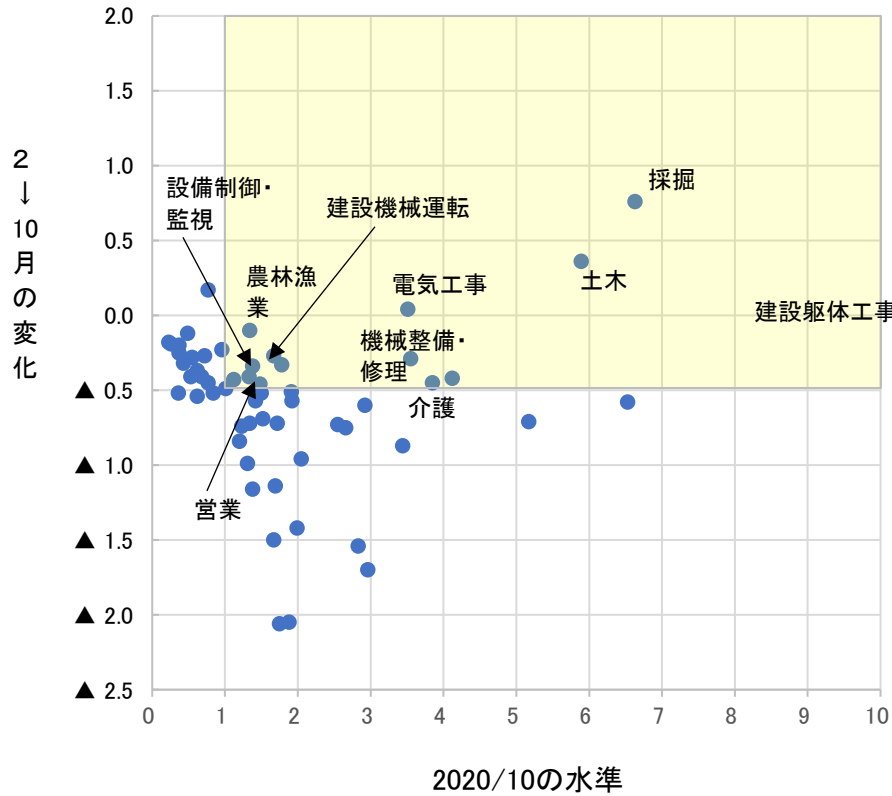


• For **essential workers** in industries with structural labor shortages (**food/agriculture, construction, care, maintenance/repair**), **full usage of digital technology and robotics** can be used to create **work processes in which humans and machines work together**, shifting them to **high productivity, high wage jobs of the future**.

• The pandemic should be used as an opportunity to establish a consortium from a collaboration between government, business, and academia to begin working towards this goal.

• This sectors are important to regional economies, and by using the funds, human capital, and knowhow of large cities could become a pillar of collaboration between big cities and regional economies creating a virtuous cycle.

(Figure 3-6) Trends in Job-to-Applicants Ratio by Occupation



(注)厚生労働省「一般職業紹介状況」

| | 10月 | 2→10月 | 有効求人数 (2019年度) |
|---------------------|------|--------|-------------------|
| 管理的職業 | 1.14 | ▲ 0.61 | 10,066 |
| 専門的・技術的職業 | | | 484,585 |
| 開発技術者 | 1.42 | ▲ 0.57 | 16,480 |
| 製造技術者 | 0.49 | ▲ 0.12 | 10,065 |
| 建築・土木・測量技術者 | 5.17 | ▲ 0.71 | 58,808 |
| 情報処理・通信技術者 | 1.20 | ▲ 0.84 | 49,612 |
| その他の技術者 | 1.78 | ▲ 0.33 | 2,489 |
| 医師、歯科医師、獣医師、薬剤師 | 1.99 | ▲ 1.42 | 13,983 |
| 保健師、助産師、看護師 | 1.91 | ▲ 0.51 | 99,782 |
| 医療技術者 | 2.55 | ▲ 0.73 | 39,784 |
| その他の保健医療の職業 | 1.52 | ▲ 0.69 | 25,563 |
| 社会福祉の専門的職業 | 2.92 | ▲ 0.60 | 122,395 |
| 美術家、デザイナー、写真家、映像撮影者 | 0.23 | ▲ 0.18 | 7,769 |
| その他の専門的職業 | 0.77 | ▲ 0.45 | 37,856 |
| 事務的職業 | | | 230,798 |
| 一般事務の職業 | 0.26 | ▲ 0.19 | 156,705 |
| 会計事務の職業 | 0.55 | ▲ 0.28 | 19,762 |
| 生産関連事務の職業 | 1.23 | ▲ 0.74 | 19,346 |
| 営業・販売関連事務の職業 | 0.62 | ▲ 0.37 | 23,278 |
| 外勤事務の職業 | 2.96 | ▲ 1.70 | 1,175 |
| 運輸・郵便事務の職業 | 1.88 | ▲ 2.05 | 6,333 |
| 事務用機器操作の職業 | 0.37 | ▲ 0.20 | 4,198 |
| 販売の職業 | | | 271,439 |
| 商品販売の職業 | 1.38 | ▲ 1.16 | 181,141 |
| 販売類似の職業 | 1.69 | ▲ 1.14 | 5,527 |
| 営業の職業 | 1.48 | ▲ 0.46 | 84,771 |
| サービスの職業 | | | 605,384 |
| 家庭生活支援サービスの職業 | 3.44 | ▲ 0.87 | 2,354 |
| 介護サービスの職業 | 3.85 | ▲ 0.45 | 228,097 |
| 保健医療サービスの職業 | 2.66 | ▲ 0.75 | 30,842 |
| 生活衛生サービスの職業 | 2.83 | ▲ 1.54 | 43,103 |
| 飲食物調理の職業 | 1.67 | ▲ 1.50 | 146,386 |
| 接客・給仕の職業 | 1.75 | ▲ 2.06 | 115,972 |
| 居住施設・ビル等の管理の職業 | 0.96 | ▲ 0.23 | 11,239 |
| その他のサービスの職業 | 1.31 | ▲ 0.99 | 27,391 |

| | 10月 | 2→10月 | 有効求人数 (2019年度) |
|------------------------|------|--------|-------------------|
| 保安の職業 | 6.53 | ▲ 0.58 | 76,853 |
| 農林漁業の職業 | 1.34 | ▲ 0.10 | 17,058 |
| 生産工程の職業 | 1.12 | ▲ 0.43 | 223,762 |
| 生産設備制御・監視の職業[金属] | 0.68 | ▲ 0.41 | 2,278 |
| 生産設備制御・監視の職業[金属除く] | 1.38 | ▲ 0.34 | 5,061 |
| 生産設備制御・監視の職業(機械組立) | 0.43 | ▲ 0.32 | 1,759 |
| 金属材料製造、金属加工、金属溶接・溶断の職業 | 1.72 | ▲ 0.72 | 47,456 |
| 製品製造・加工処理の職業[金属除く] | 1.33 | ▲ 0.41 | 78,031 |
| 機械組立の職業 | 0.37 | ▲ 0.25 | 23,847 |
| 機械整備・修理の職業 | 3.55 | ▲ 0.29 | 34,216 |
| 製品検査の職業[金属] | 0.84 | ▲ 0.52 | 3,529 |
| 製品検査の職業[金属除く] | 1.34 | ▲ 0.72 | 6,489 |
| 機械検査の職業 | 0.62 | ▲ 0.54 | 4,706 |
| 生産関連・生産類似の職業 | 0.72 | ▲ 0.27 | 16,391 |
| 輸送・機械運転の職業 | | | 137,566 |
| 鉄道運転の職業 | 0.77 | 0.17 | 93 |
| 自動車運転の職業 | 2.05 | ▲ 0.96 | 111,352 |
| 船舶・航空機運転の職業 | 0.36 | ▲ 0.52 | 92 |
| その他の輸送の職業 | 0.53 | ▲ 0.41 | 6,806 |
| 定置・建設機械運転の職業 | 1.67 | ▲ 0.27 | 19,223 |
| 建設・探掘の職業 | | | 111,617 |
| 建設躯体工事の職業 | 9.11 | | 20,340 |
| 建設の職業 | 4.12 | ▲ 0.42 | 30,285 |
| 電気工事の職業 | 3.51 | 0.04 | 19,397 |
| 土木の職業 | 5.89 | 0.36 | 41,313 |
| 探掘の職業 | 6.63 | 0.76 | 282 |
| 運搬・清掃・包装等の職業 | | | 226,026 |
| 運搬の職業 | 1.01 | ▲ 0.49 | 64,641 |
| 清掃の職業 | 1.50 | ▲ 0.52 | 90,961 |
| 包装の職業 | 1.92 | ▲ 0.57 | 8,944 |
| その他の運搬・清掃・包装等の職業 | 0.25 | ▲ 0.06 | 61,480 |

(資料)厚生労働省「一般職業紹介状況」

(注)黄色で塗りつぶした職種は8月の水準が1を上回り、かつ、2→8月の変化が▲0.5ポイントを上回るもの。

Conclusion

- ◆ Employment is a lagging indicator for the economy, and as it will take time for the economy to recover to pre-pandemic levels, **it is necessary to prepare for worsened employment conditions even if the economy recovers.** However, **changes to the structure of industry have been progressing during the pandemic, and it will not return to what it used to be.**
- ◆ Current job retention policies must be **shifted to job mobility policies.** At the same time, **gaps in the safety net** which were exposed by the pandemic **must be filled with employment support systems.**
- ◆ **Japan's style** should be a) temporary work sharing, b) remote work between large cities and regional economies, and c) turning essential workers into jobs of the future.