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Between optimism and uncertainty

2016 Labor Market and Industrial Relations Review and Outlook for 2017 in Germany

1 Introduction

Having weathered off the financial crisis of 2008 quite well and being the hidden winner of the Euro crisis, Germany has been going strong for now about a decade with an average annual growth of 1.4 percent of GDP throughout 2005 to 2015, the massive slump of 2009 included. Though economic growth is not as impressive as employment growth and strongly dependent on export surpluses, economic and employment developments contrast positively with most other EU member states. Employment and unemployment indicators are back to what they were before the unification stifled the East German economy: After 25 years, unification appears to have been mastered at least structurally, though not politically. After years of near-stagnation of real wages, workers are now reaping the benefits of their strengthened position vis-à-vis growing demand for labor. Issues of decent earnings, job quality and sustainable working conditions are back on the agenda. At the same time, however, the experience of globalization has assumed a fundamentally new quality. For around 20 years, German workers were kept in fear that their jobs would move out into the world. Now there is fear that too large parts of the world will move in, in their hope for safety and jobs. 2015 was the year of welcome, and 2016 has given a first idea of how difficult labor market integration of refugees really is. 2017 will be test whether the German education and employment system will improve under the challenge or in effect repel those who were initially welcomed.

2 Macroeconomic and demographic developments

In 2016, the German economy with 1.9 percent of GDP grew at about the same pace as in the two preceding years. Growth continues to be carried by export surpluses beyond the 6-percent-of-GDP-threshold postulated by the European Macroeconomic Imbalances Procedure. However, surpluses appear not to have increased further in 2016. Despite modest growth and extraordinary low lending rates, investment in capital equipment remained weak, reflecting uncertainty about the future of the Euro zone, keeping imports low and thus contributing to imbalances.

Employment continued to grow by 1 percent in 2016 (0.9 percent in 2015). With 43.8 million persons in gainful employment, this is the highest number since the German unification. Employment numbers have grown much more than the number of hours worked annually. In other words, employment growth is strongly supported by an increase of (predominantly female) part-time work. Due to demographic ageing and shrinking of the workforce, the employment rate of the population aged 20 to 64 grew even faster than their employment in absolute numbers: from 69.4 percent in 2005 to 78 percent in 2015. Furthermore, during the same period, employment rates
of the population aged 65 to 69 more than doubled from 6.5 percent to 14.5 percent, due to pension reforms and high labor demand. Birth cohorts approaching what used to be retirement age are now in better health and more employment-oriented than their forerunners.

According to the national administrative count, the number of unemployed is now lower than in 1991, before the massive job loss in East Germany following the German unification. The unemployment rate (national count) is down to 5.8 percent in December 2016 (6.3 percent for 2016 on average). Survey-based internationally comparable unemployment rates\(^1\) are down to 4.6 percent in 2015 (annual average), as compared to a peak of 11.2 percent in 2005 (Eurostat database). This is currently the lowest unemployment rate in the EU. In absolute terms, the reduction of unemployment equals about half of the increase in employment: Employment growth was strongly fed from the population hitherto “out of the labor force” or from recently arrived migrants, while a considerable stock of unemployed persons “distant from the labor market” was left behind (cf. Knuth 2015).

After about a decade of low (and, in 2009, even negative) net migration, migration into Germany steeply increased year after year from 2010 to 2015. At first, this was mostly fed from South-Eastern Europe following the most recent steps of EU enlargement and from Southern Europe as a result of the Euro crisis. Since 2015, however, asylum seekers mostly from the Middle East and Northern Africa have outnumbered migrants EU internal migration. Because of the inability of public authorities to properly register the sudden influx of people in 2015, numbers are not fully clear; entries in 2015 and 2016 together numbered at roughly 1.2 million, adding to a population of 81 million. The top five countries of origin are Syria, Afghanistan, Iraq, Iran, and Eritrea.

Migration is deferring the projected shrinking of the population and, since most migrants are young, slowing down the ageing and shrinking of the potential labor force. However, whereas EU migrants are contributing considerably to employment growth, asylum seekers will have a long way to go, due to language and institutional barriers and because of inadequacy of their education and skills. As asylum seekers are gradually achieving recognition or temporary protection and thus formal labor market access, they will initially feed the unemployment count more than the employment figures. The German labor market is not an easy one to integrate into, and full-fledged integration of refugees as well as supporting educational achievement of their children will be long-term challenges. In the medium term, the influx of refugees will exacerbate the skills mismatch which is so characteristic of the German labor market: Skills shortages and structural unemployment will continue to coexist.

### 3 Collective bargaining and industrial relations

Collectively agreed wages increased by 2.4 percent in 2016. This is somewhat less than in 2015 but close to the average for 2010 to 2015. With inflation running low, this amounts to a 1.9 percent increase of real wages. 2016 was thus the sixth year in

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\(^1\) National and international unemployment figures differ both in method and definition in several respects. One example is that, according to the national account, a registered jobseeker working less than 15 hours per week and wanting to work more than 15 hours is counted as unemployed whereas such a person would be considered employed by international standards.
a row with real wage increases, after a period of real wage losses and stagnation from 2005 to 2008 and again in 2011 (WSI-Tarifarchiv 2017).

Differences in wage trends for 2015 and 2016 reflect that 2015 had been a year with unusually intensive strike action with around two million working days lost due to strikes. Wage outcome differences would have been even higher if workers had not benefited from rises in 2016 which were already agreed in 2015. Whereas the manufacturing sectors experienced only token strikes, predominance of social services, transportation and postal services in strike actions was a new phenomenon in 2015. Beyond mere pay issues, these strikes addressed structural problems and conflicts about labor-management relations like the appreciation of preschool education work, the recognition of the train driver union, spin-offs from company structures aimed at enforcing lower pay structures, and corporate pension schemes. The latter conflict at Lufthansa continued into 2016 and caused much public attention but did not involve many employees.

Average nominal wages in total grew somewhat more slowly than collectively agreed wages and were only 2.3 percent higher in the third quarter of 2016 than in the third quarter of 2015. This reflects the unbroken trend towards lower bargaining coverage of workers (Ellguth & Kohaut 2016). This is not so much caused by trade unions losing traditional grounds but more by the resistance of new and growing sectors against recognizing trade unions as bargaining partners. Recurring disputes in various Amazon distribution centers are emblematic for this unresolved conflict. In the same vein, about every sixth initiative for a first-time election of a works council meets some sort of obstruction or rigging by the employer (Behrens & Dribbusch 2016). Whereas German industrial relations appear rather stable at the macro level, they can sometimes be strongly contested on the ground.

4 Initial effects of the statutory minimum wage

Like in many other countries, income and earnings inequality has grown considerably in Germany since the mid-1990s (OECD 2008). Declining collective bargaining coverage is part of this story (Knuth 2014). German trade unions tend to pursue wage policies with some solidaristic component, which is absent where wages are set unilaterally. For some time around the turn of the century, an expansion of the low wage sector was even advocated by many as a cure against exclusion of low-skilled workers from employment (cf. Knuth 2012). Actually, the skills component in wage dispersion is high in Germany (OECD 2015), but nevertheless three quarters of those earning less than 60 percent of the median hourly wage in 2013 did have a vocational or academic degree (Kalina & Weinkopf 2015). While the low wage sector thus defined grew continuously until 2009, relative employment opportunities and unemployment risks of workers without formal vocational qualification did not improve. Low wage employment turned out to be more like a trap than a stepping-stone into better paid jobs (Schank et al. 2008; Voss & Weinkopf 2012). Furthermore, the consolidation of benefits effected by the labor market reforms of 2005 (Knuth 2016) made the number of “working poor” – those combining paid work and some kind of benefits – more statistically visible (Rudolph 2014). Their numbers grew until 2010 and declined only marginally since then, remaining between 1.2 and 1.3 million or 3 percent of the gainfully employed (Bruckmeier et al. 2015).
Against this backdrop, the Christian and Social Democratic partners of the current government coalition agreed in 2013 on the introduction of a statutory minimum wage (cf. Knuth 2016). With some transitional arrangements and permanent exceptions for certain groups and types of employment, the minimum wage took effect as from January 1, 2015. Initially, the hourly wage minimum was set at 8.50 Euros. In mid-2016, the Minimum Wage Commission (see Knuth 2015 for details) recommended raising the minimum wage to 8.84 Euros from January 2017, based on an assessment of foregoing collective bargaining outcomes. As expected, and despite employer organizations’ vociferous objection against the introduction of the minimum wage, the proceedings of the Minimum Wage Commission went without any public confrontation. It is probably justified to conclude that the minimum wage machinery has become an integral part of the German industrial relations system.

As already suggested by the macro development, the introduction of the minimum wage did not interrupt the long-standing trend of employment growth. Whereas neoliberal economists continue to adhere to their creed, contending that perhaps employment growth would have been stronger without the minimum wage, this is refuted by all empirical findings hitherto available. Garloff (2016) finds that in regions where earnings below minimum wage level had been particularly widespread and which have therefore been impacted by the new regulation more strongly than average, employment and unemployment trends do not differ from regions with lesser impact. Employers did not resort to dismissals in reaction to the minimum wage; they may have become somewhat more reluctant to hire (Bellmann et al. 2016) and more selective in their recruitment (Gürtzgen et al. 2016). Exceptions from the minimum wage regulation which had been highly controversial in the making of the law were hardly made use of in practice (Bellmann et al. 2016; vom Berge et al. 2016b). As might be expected, wages in traditional low-wage sectors grew above average (Amlinger et al. 2016), thus compressing the wage distribution at its lower end. Considerable anticipation effects were observed already in 2014 when 4.5 percent of new hires received exactly what was to be the minimum wage from 2015 (Kubis et al. 2015).

Of particular interest is the effect of the minimum wage on the so-called minijobs - jobs earning no more than 450 Euros per month. These jobs are exempt from income taxation (the employer pays a small lump sum tax instead) and allow opting out of social insurance. In 2013, three quarters of all minijob holders earned hourly gross wages below the statistical low-wage threshold (60 percent of median earnings) of then 9.30 Euros per hour (Kalina & Weinkopf 2015). This can in part be explained by the employer reaping the tax and contribution privilege formally granted to the employee. This practice is justified by employers by hourly net wage inequalities that would otherwise arise: With equal hourly gross pay, minijobbers would receive higher hourly net pay than full-timers. Thus in 2012, 42 percent of those earning less than 8.50 Euros per hour gross pay (the later minimum wage) were minijob holders. It is then obvious that minijob holders would be affected far above average by the introduction of the legal minimum wage, and in particular those earning close to the 450 Euro threshold would be driven out of the minijob regulation by an increase of their hourly rate. Depending on the income situation of the family, earning above the threshold in terms of gross wages could mean earning less in terms of net wages, which characterizes the perverse incentive inherent in the minijob privilege.
In principle, employee and employer of a minijob near the earnings threshold face three ways of reacting to the introduction or a raise of the minimum wage: Reducing the number of working hours, continuing the job despite losing the tax and benefit privilege, or ending the job by quit or dismissal. Statistical evaluation showed that transitions from minijobs to jobs fully covered by social insurance doubled above the long-term trend exactly with the introduction of the minimum wage in January 2015; around 50,000 minijobs (about 1 percent of minijobs held as workers’ only jobs) were converted (vom Berge et al. 2016a). The regional analysis finds a particularly strong reduction of minijobs and above average growth of regular jobs in areas with strong minimum wage impact (Garloff 2016). But also transitions from minijobs into unemployment or “out of the labor force” increased by almost the same magnitude as conversions (vom Berge et al. 2016a). These are the cases where either the employee was not interested in working without the tax and contribution privilege or where the employer would not accept shorter working hours. Finally, it was found that average working hours of minijob holders decreased by 5 percent in the east and by 2.5 percent in the west, and this was largely effected by those working around 12 or 13 hours per week in 2014, that is near the 450 Euro threshold (Wanger & Weber 2016).

Though the issue of “working poor” - employed claimants of supplementary benefits - may have contributed to initiating the reform, their numbers were reduced by only around 4.5 percent overall, much stronger in East Germany by 11.4 percent. The reason is that many of those concerned are working part-time or have larger families to support. It is only for single persons working full-time and living in an area where housing costs do not exceed the average (this is the case in much of the East) that the minimum wage will suffice to fully quit minimum income benefits. However, statistics on deductible earnings of receivers of supplementary benefits give some additional clue about the mechanisms of adjusting to the minimum wage: The drop in the numbers of supplementary claimants was strongest in the earnings category up to 450 Euros and weakest in the category between 450 and 850 Euros. This indicates that many of the employees and employers concerned actually did accept their earnings to grow beyond the 450 Euro threshold and losing the tax and contribution privilege of the minijob regulation as a result of the minimum wage. For claimants of supplementary benefits this is a logical behavior since the consideration of their earnings on a net basis will level out the unsteadiness of the gross/net ratio at the 450 Euro threshold. Growing out of the minijob also demonstrates that the labor market does not need minijobs as a distinct institution. Introducing a linear progression of employees’ social insurance contributions from near zero up to full contributions at the living wage level would be sufficient to support holders of small jobs and avoid traps.

5 „Working 4.0“

A recent study by Frey and Osborne (2013) has renewed the international debate on skills obsolescence and a possible “end of work” (Rifkin 1995). These authors see 47 percent of US jobs at risk of being replaced by computerization. By contrast, against the backdrops of a highly skilled workforce (only 13 percent of those employed have no formal vocational or academic qualification) and a favorable employment climate (see above, 2), the German discourse has taken quite a different direction. The aforementioned study is criticized on methodological grounds for considering only
occupations and the jobs held by them rather than tasks; computers, however, would take on tasks (as they have done in the past), not necessarily complete occupations (Bonin et al. 2015). Remaining tasks will be regrouped, computerization itself will create new tasks, and typical bundles of tasks will crystallize into modified or totally new occupational profiles. It is not by chance that authors from Germany, a country with an elaborate system of regulated and certified occupations, would criticize the simplistic concept of “jobs” and insist on breaking down the analysis to tasks.

Following a task-based approach, Bonin et al. (2015) find only 9 percent of U.S. jobs with a high probability (>70 percent) of being replaced by computerization, and 12 percent of such jobs in Germany. Following a similar approach but using a different data source describing the tasks typically performed by particular occupations, Dengler and Matthes (2015) arrive at an estimate of 15 percent of jobs susceptible to automation. It should be noted, however, that this is an assessment of the task and occupational structure of 2013 against a projection of future technological development. In the meantime, many other parameters may change. A good deal of deepened digital network integration depends not on further technological achievements but on how organizations will adopt existing technological possibilities. Therefore, measures of risk like 12 or 15 percent should not be taken as a prognosis of a future decline of employment.

In a more dynamic scenario of full digitalization in all sectors until 2025, Wolter et al. (2016) find very moderate net job loss but considerable restructuring in terms of the sectoral, occupational and task structure of the economy: 1.5 million jobs will disappear which would continue to exist under an unchanged path of technological development, but there will also be 1.5 million jobs that would not be created without full digitalization. Still, against a total of more than 43 million jobs and compared to the massive restructuring of the 1990s, this scenario appears manageable. Jobs lost and newly created taken together, the rate of change is estimated at only 7 percent.

The discourse on computerization and the future of work in Germany is strongly politically driven by two traditionally competing departments of the German federal government, the Ministry for Education and Research and the Ministry for Work and Social Affairs. These government departments stage conferences, put out programmatic booklets and commission research under the trade names of “Industry 4.0” and (as far as the Ministry for Work is concerned) “Working 4.0”. In addition to contending that we are witnessing something like the dawn of a “fourth industrial revolution” (Krzywdzinski et al. 2015), this linguistic format is probably chosen in order to insinuate a relaunch of political modernization strategies and to allure to the key role of IT technologies. Under the “4.0” metaphor, quite disparate phenomena like 3D printing, autonomous automotive systems (on roads or within factory and storage facilities), interactive robots, smart watches, the “internet of things” and Big Data are lumped together without a clear analytical concept linking them. At any rate, many of these phenomena have to do with the integration of some kind of sophisticated hardware with digitally networked IT technologies. In this field German manufacturers feel strong whereas Germany has always lagged behind in purely virtual IT applications. It seems, however, difficult to empirically assess the state of affairs within companies and workplaces: What exactly would mark the watershed between “conventional” and “4.0” digitalization at company level? Does a telephone survey like the one reported by Arntz et al. (2016) measure the level of
technological and organizational development - or rather the degree of awareness of managers with regard to a public discourse?

The political messages are more clear-cut than the analytical concept. Since the aftermath of the German unification which destroyed around 40 percent of jobs in the east, and well into the first decade of the new century with its deep-cutting labor market reforms (Knuth 2016), the widely held belief was that “any job is better than no job”. Now, however, with low unemployment and persistent skills shortages, it is time to recover traditions of the 1970s and 1980s when industrial modernization, improvements of the quality of working life and upskilling of the workforce were closely interlinked (Knuth 1992). Rather than being afraid of the next turn of the digital age, German companies and workers should embrace and actively shape the future of work and production. In Germany’s current economic, political and discursive environment, German trade unions are not deploring or opposing digitalization but resuming their traditional stand of critical co-management which might be circumscribed as “Yes, but don’t forget to...” There is confidence that this new wave of digitalization, if properly managed through social dialogue and the participation of workers as users, can be instrumental to improving working conditions. In many respects, the argumentation patterns of the seventies and eighties are resurging.

This is not to say that companies, the government, and trade unions are actually managing successfully the big changes that would lead to a “4.0” economy and to “4.0” working. Many obvious and undisputed challenges prove difficult to meet in practice, like reducing the percentage of young people entering adulthood without vocational skills, materializing the eternal rhetoric about “life-long learning” or reconciling people’s productive and reproductive aspirations and responsibilities. As mentioned earlier, the recent influx of refugees will aggravate the mismatch between the task structure of the economy and the skills structure of the workforce, and Germany’s educational and training system seems ill prepared to effectively tackle this problem.

Furthermore, with the return of the “shaping work and technology” paradigm, two questions still need to be answered: (1) What difference did the activities in the seventies and eighties - of the government, trade unions, works councils, and researchers dedicated to work-related issues - really make in view of a critical assessment from some historical distance, and which kind of interventions actually made this difference? What worked and what did not? (2) Will the same strategies as those of the seventies and eighties be effective to positively influence the way “4.0” technologies are implemented, or how would the different nature of these technologies require different strategies?

6 Outlook for 2017

Economic and employment expectations for the twelfth year of an unusually long business cycle only shortly interrupted by the financial crisis of 2008 are still cautiously optimistic. Though private real investment will continue to be weak, private and public consumption are expected to support moderate economic growth in 2017 which will, however, be somewhat lower than in preceding years. Public spending for maintaining the livelihood of refugees, for language training and labor market integration will run around 10 billion Euros and will thus contribute
noticeably to consumption. Public sector employment will grow because of additional needs in administration, education and public security. The construction industry will benefit from a new impulse in social housing investment and from ever more urgent needs to repair or replace public infrastructures originally built in the 1960s and 1970s. Employment is expected to grow in 2017 by around 370,000, and the quality of jobs will improve since employment fully covered by social insurance will grow more strongly than minijobs and “bogus” self-employment (Horn et al. 2016). Nevertheless, for the first time since 2009, unemployment will grow as well as refugees will be granted labor market access but cannot find jobs.

Trade unions’ wage claims for 2017, as far as these are already decided at the beginning of the year, are running between 4.5 and 6 percent. Unless the year brings unforeseen economic setbacks, nominal wage increases can be expected to continue at about the same trend as in recent years. However, these increases might be somewhat lower in real terms since energy prices have begun to push inflation.

In political terms, by contrast, the year of 2017 will bring many uncertainties. After success in several regional elections, federal elections in September 2017 will almost certainly see the advent of a new “populist” right-wing party (however with a neoliberal social policy agenda) in the federal parliament. It can be taken for sure that the incumbent parties will not accept this newcomer as a coalition partner. With reduced shares of seats for the incumbent parties it is impossible to anticipate which combination of parliamentary groups will be able to form a government majority. This uncertainty may result in unexpected turns of parties during the election campaign.

External uncertainties are even more important. The implications of Donald Trump’s presidency are difficult to anticipate both in political and economic terms. A “hard” Brexit from the EU might cause an economic shock whereas a “soft” Brexit might be seen by some other skeptical member states as a license for loosening ties with the European Union. The destinies of the Euro and of the EU as a whole are uncertain, and the German role in the EU is ambivalent: Other nations expect the German government to lead but hate it if it does, due to differences in economic philosophy and the burden of history. Germany’s perceived political and economic stability exists only relative to other European countries; actually the German elites seem neither politically nor conceptually prepared to lead Europe out of its limbo. Turkey is becoming an increasingly unstable and embarrassing partner but holds the key to retaining another nearly three million of refugees. If numbers of asylum seekers were to considerably increase again, any German government would face severe political trouble.

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독일의 2016년 노동시장과 노사관계 검토 및 2017년 전망: 낙관주의와 불확실성 사이

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도입

독일은 2008년 금융위기를 비교적 잘 극복하고 유로화 위기의 습격을 승려자로서 최근 10년간 극건하게 바뀌었다. 비록 경제성장이 고통증가만큼 인상적이지는 않고 무역 흑자가 크게 의미하고 있지만 다른 대부분의 EU 회원국들에 비해 높은 경제성장 및 고용 성장이 나타났다. 고용 및 실업 지표가 통일 후 동독 경제를 순상하게 하기 전 상태로 회복된 것을 볼 때 독일 통일은 25년이 지난 지금 정치적으로는 아니라도 최소한 구조적으로 완결된 것으로 보인다. 수년간 거의 정체 상태에 머무르던 실질임금을 견뎌온 근로자들은 이제 노동수요가 커지면서 강화된 임지를 누리고 있다. 적정 소득, 양질의 일자리, 지속가능한 근로조건 등의 이슈가 다시 부각되고 있다. 한편 세계화의 경험이 근본적으로 새로운 양상을 띠기 시작했다. 독일 노동자들은 20년 가까이 자신들의 일자리를 다른 국가에 빼앗길 것이라는 두려움에 시달렸으나 이제는 안전과 일자리 찾아서 너무 많은 외국인이 물려 올 것을 두려워하고 있다. 환대의 2015년을 지나 2016년은 난민을 노동시장에 통합하는 것이 얼마나 어려운지 잡아하게 한 해였다. 2017년은 독일의 교육 및 고용 시스템이 이러한 도전에 맞서 개선되거나 아니면 처음 형성하며 맞이했던 이들을 밀어내는 시험 기간이 될 것이다.
2017 2월 February

01 글로벌 포커스
  • 2017년 거시경제로 미루어본 노동시장 전망

07 기획특집 : 2017년 노동시장 전망
  • 2017년 미국 고용 전망 : 트럼프 행정부는 고용정책을 어떻게 바꿀 수 있는가?
  • 독일의 2016년 노동시장과 노사관계 견고 및 2017년 전망 : 낙관주의와 불확실성 사이
  • 산업구조조정에 따른 2016년 중국 노동관계 현황 및 2017년 전망

55 국제노동동향
  • 미국의 가족의료유공급휴가 정책 현황과 전망 및 유급휴가 효과에 대한 논쟁
  • 영국의 고용심판소 수수료 납부제도 도입과 현황
  • 프랑스의 직장 내 휴식 착용에 관한 규제
  • 핀란드의 기본소득제도 실험

95 세계노동소식