Overview of the labour market

Inevitably interest in the Scottish labour market continues to focus on the trends in employment and unemployment and again we return to these themes. Concern is increasingly focusing on the rise in underemployment and the productivity puzzle - why has employment performed better in this recession, whilst the fall in labour productivity is larger and more persistent than in previous recessions. In addition the UK Government proposals reform public sector terms and conditions of employment continue to emerge as do a number of previously heralded changes to employment.

Underemployment

In December the Economy, Energy and Tourism Committee called for evidence as to the issues related to the rise in underemployment, the rise in part time employment and work that does not utilise all the skills employees possess. A submission by Felstead noted that conventionally less attention is given to skills underutilization and drew the committee's attention to the Skills Survey Series (Felstead et al 2007) which highlighted that proportionally Scotland had fewer jobs than the UK as a whole requiring degrees on entry, but proportionately more jobs that did not require qualifications on entry. 'In 2006, almost two-fifths of respondents reported that their highest qualification was above that required for entry (i.e. they were overqualified)'.

In contrast, Bell's submission highlighted the impact of changes to the labour force noted in previous Commentaries; namely that whilst the numbers employed have increased this has been due to an increase in part-time and self-employment and a decline in full-time employment (see table 5 and figure 2 later in this section). In addition average hours worked have declined and since the onset of the recession there has been an increase in the numbers wishing to work longer hours.

The productivity – unemployment puzzle

Explanations as to why employment has been rising whilst productivity has remained depressed have explored the rising numbers of part time and self-employed employees, together with the decline in average hours worked. The IFS in exploring a number of dimensions of the UK 'Productivity Puzzles' in the Green Budget 2013 (see chapter 3) and argued that 'the UK labour market has changed in ways that make it more likely that adjustments (to labour costs) will come through hours or wages rather than headcount'. Increased labour market flexibility together with an increase in labour supply (due in part to changes in pension age, and in benefit systems making it harder to access and stay on benefit schemes). In addition it noted that the fall in aggregate productivity is largely driven by productivity falls within industries, notably finance & insurance and mining & quarrying.

Unlike the previous two recessions longer term lower real wages have contributed to allowing firms to continue to employ workers, and secondly business investment has remained lower for longer and labour may be being substituted for capital as demand remains uncertain.

Less attention has focussed on whether this reflects less adversarial employee relations (or weaker trade union powers and the changed regulatory regime) and a longer term structural change as more organizations, for a combination of technological, supply chain and work organization methods, have achieved optimum and more flexible staffing levels/hours as evidenced by the increasing numbers employed on flexible working hours and/or on agency/contract bases.

Employment law issues

As we noted in the June 2012 Commentary the Beecroft Report contained recommendations to change/simplify employment legislation in a number of areas. In October plans were announced for employees to accept reduced employment rights in exchange for shares. In return for shares valued between £2 – 50,000 employees would give up rights to unfair dismissals, statutory redundancy payments and the right to request flexible working or time off for training. This was generally seen as essentially a niche idea, relevant to high value business start-ups, but of little relevance elsewhere. In January further proposals and consultations were announced in respect of: (a) Changes to sickness and absence. The Department of Work and Pensions announced the introduction in 2014 of a new, government funded, health and work assessment and advisory service to provide a state funded occupational health assessment for employees who are absent for four or more weeks. Additionally it will publish a revised guidance note for GPs stressing the importance of assessing an individual's health in relation to work in general rather than to a specific role. (b) A consultation notice as to the abolition of Service Provision changes in TUPE (dealing with outsourcing, bringing work back in house and or changing a service provider) and a number of other changes to TUPE relating to harmonisation/variation of terms and conditions post transfer, measures to enable changes and restructuring to take place more quickly, and changing the disclosure of information requirements. (c) Simplifying the use of 'settlement agreements' with legislation, a statutory code and guidance in place by mid-2013. (d) A twelve month pay cap to the compensatory award in unfair dismissals. (e) The introduction of tribunal fees - £250 - £350 depending on the claim (with the possibility of additional fees) for further hearings - in July 2013.

Further information as to the existence and extent of black listing of construction employees emerged in January. Evidence as to the blacklist emerged following action by the Information Commissioner's Office. Currently a rising number of claimants have initiated action against a number of construction firms.

Recent trends and statistics

The latest comparable figures on the labour market between Scotland and the United Kingdom in the quarter to December 2012 are summarised in Table 1. Labour Force Survey (LFS) data show that in the quarter to December the level of employment in Scotland fell by 11 thousand, to 2,460 thousand. Over the year to December 2012, employment in Scotland rose by 2 thousand. For the same period, UK employment rose by 154 thousand. The Scottish employment rate (16 – 64) – those in employment as a percentage of the working age population – was 70.7 per cent, down 0.1 per cent to one year earlier. For the same period the UK employment rate was 71.5 per cent, up 1.1 per cent compared to one year earlier. Scottish unemployment, in the quarter to December, fell by 13 thousand to 206 thousand, a fall of 25 thousand over the year.

Table 1: Headline indicators of Scottish and UK labour market, Oct - Dec 2012 (thousands)

Oct – Dec 2012		Scotland	Change on quarter	Change on year	United Kingdom	Change on quarter	Change on year
Employment*	Level (000s)	2,461	-11	2	29,730	154	584
	Rate (%)	70.7	0.1	-0.1	71.5	0.3	1.1
Unemployment**	Level (000s)	206	-13	-25	2,501	-14	-156
	Rate (%)	7.7	-0.4	-0.9	7.8	-0.1	-0.6
Inactivity***	Level (000s)	791	9	27	8,979	-94	-294
	Rate (%)	23.3	0.3	0.8	22.3	-0.2	-0.8

Source: *Labour Market Statistics (First Release), Scotland and UK, September 2012*

** Levels are for those aged 16+, while rates are for those of working age (16-59/64)*

*** Levels and rates are for those aged 16+, rates are proportion of economically active.*

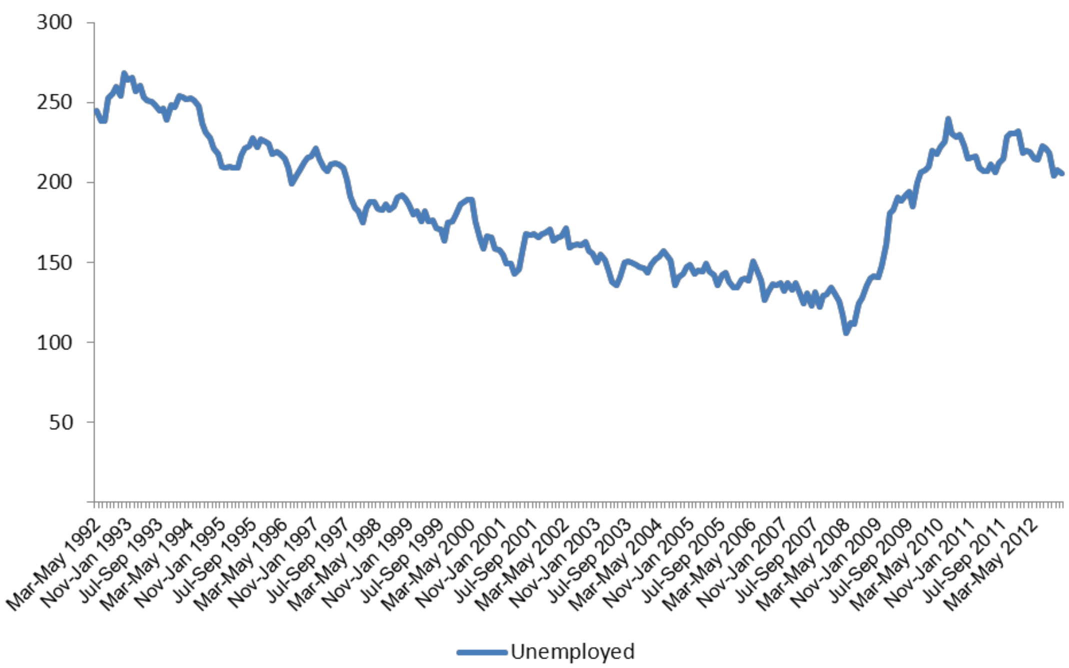
**** Levels and rates for those of working age (16-59/64)*

In considering employment, activity and unemployment rates it is important to remember the bases and relationships of these figures. LFS data (estimated) is provided for: (1) all aged 16 and over and (2) for all aged 59/64. The first measure (all aged 16 and over) leads to higher numbers in employment, in the total economically active and economically inactive – but reduces the economic activity rates and unemployment rates, but at the same time increases the economically inactive rate. Conversely the second measure (all aged 16 to 59/64) leads to lower numbers economically active, in employment and economically inactive – but leads to a higher economically active, employment and unemployment rates but lower economically inactive rates. Figures derived from the Labour Force Survey differ slightly from those derived from the Annual Population Survey.

The relationships between employment, unemployment, totally economically active and inactive are important in appreciating changing levels of employment and unemployment, and changes in the employment rates should be seen in conjunction with changes in the activity rates. If people leave employment and become unemployed (but are still economically active) the unemployment rate increases, but the economically active rate remains unchanged. However, if people leave employment and do not seek employment, as seems to be a continuing pattern, they are categorised as economically inactive, as such the unemployment rate remains unchanged whilst the activity and inactivity rates change. Equally the changing pattern between full and part time employment is of interest and once again we return to this issue later in this section. This is clearly shown in Table 1. Over the year to December 2012, the numbers employed rose by 2 thousand, whilst unemployment fell by 25 thousand – and the numbers of those aged 16-59/64 who are economically inactive rose by 42 thousand and the numbers economically active fell by 23 thousand.

Table 1 shows that for Scotland the preferred International Labour Organisation (ILO) measure of unemployment fell to 206 thousand, between October – December 2012, a fall of 25 thousand over the year. The ILO unemployment rate fell in the three months to December 2012 now stands at 7.7 per cent. This represents a 0.4 per cent fall over the last quarter and a 0.9 per cent fall over the year. The comparable ILO unemployment rate for the UK stands at 7.8 per cent, and is down 0.1 per cent over the most recent quarter and also down 0.6 per cent over the year.

Figure 1 Trend in Scottish unemployment 1992 – Oct – Dec August 2012 (thousands)



Source: Labour Market Statistics (First Release), Scotland and UK, February 2013

Figure 1 illustrates the trend in unemployment in Scotland since 1992. Unemployment peaked in October – December 1992 at 268,000, it took almost five years - to August - October 1997 - to be consistently below 200,000 and a further five and a half years - to February – April 2003 - to be below 150,000 and reached the lowest number (111,000) in May – June 2008. If the same pattern is repeated, and unemployment does not rise in future months, then it may take approximately three years for unemployment to fall below 200,000, however, the more rapid rise in part time and self-employment (see figure 2 and table 5) would suggest that unemployment may well fall below 200,00 more rapidly.

Data on employment by age, derived from the Annual Population Survey, is available up to September 2012. In the year to September 2012 employment rates fell for those aged 16 – 24, but rose for those aged 16 – 64 and over 65. Employment rates for women (16 – 64) again were weaker than those for men. Table 2 illustrates the changing employment rates by age group for October – September 2004 onwards.

Table 2: Employment rates thousands (%) People by age for October 2004 – September 2012

	All 16+	16 - 64	16 - 17	18 - 24	16-24	25 - 34	35 - 49	50 - 64	65+
Oct 04 - Sep 05	59.5	72.7	44.3	68.0	62.8	79.5	82.3	62.4	5.1
Oct 05 - Sep 06	59.9	73.0	43.3	68.3	62.9	79.7	82.9	62.9	5.3
Oct 06 - Sep 07	60.6	74.0	40.6	68.6	62.6	81.5	83.8	64.5	5.4
Oct 07 - Sep 08	60.9	74.2	40.1	67.9	61.9	81.6	83.7	66.0	6.0
Oct 08 - Sep 09	59.5	72.3	37.1	64.4	58.6	80.1	82.1	64.6	6.8
Oct 09 - Sep 10	58.3	71.0	31.1	62.7	56.2	77.9	81.1	64.2	6.6
Oct 10 - Sep 11	58.0	70.7	31.0	61.1	55.0	79.3	80.7	63.6	6.7
Oct 11 - Sep 12	57.9	70.8	28.8	58.4	52.5	79.7	81.5	64.1	7.5

Source: *Labour Market Statistics (First Release), Scotland and UK, February 2013*

Table 3: Activity, employment, unemployment and inactivity rates by Local Authority Area Oct 2011 – Sept 2012 (%)

	economic activity rate - aged 16-64	employment rate - aged 16-64	unemployment rate - aged 16-64	unemployment rate - aged 16+	% who are economically inactive - aged 16-64	% of economically inactive who want a job
Aberdeen City	81.6	76.2	6.6	6.4	18.4	29.2
Aberdeenshire	82.5	79.5	3.6	3.5	17.5	28.0
Angus	79.2	74.2	6.3	6.2	20.8	23.5
Argyll and Bute	77.8	72.0	7.5	7.2	22.2	28.5
Clackmannanshire	73.9	66.0	10.6	10.6	26.1	22.5
Dumfries and Galloway	75.9	68.6	9.7	9.2	24.1	24.5
Dundee City	71.4	64.8	9.2	9.2	28.6	33.0
East Ayrshire	75.0	66.5	11.3	11.1	25.0	23.6
East Dunbartonshire	78.3	73.4	6.3	6.1	21.7	27.7
East Lothian	78.8	73.5	6.8	6.6	21.2	22.5
East Renfrewshire	77.1	72.4	6.1	6.0	22.9	21.1
Edinburgh, City of	74.8	71.1	4.9	4.9	25.2	11.7
Eilean Siar	75.9	70.6	7.0	6.8	24.1	19.8
Falkirk	78.1	71.3	8.7	8.6	21.9	26.0
Fife	77.7	70.0	9.9	9.6	22.3	27.7
Glasgow City	70.8	62.4	11.8	11.8	29.2	25.5
Highland	81.6	78.2	4.2	4.1	18.4	29.0
Inverclyde	76.9	66.3	13.9	13.7	23.1	23.2
Midlothian	79.8	75.1	5.9	5.9	20.2	30.3
Moray	81.4	78.3	3.8	3.7	18.6	42.0
North Ayrshire	71.5	62.5	12.7	12.4	28.5	23.7
North Lanarkshire	78.6	68.8	12.5	12.4	21.4	26.6
Orkney Islands	84.7	80.8	4.6	4.4	15.3	37.0
Perth and Kinross	81.5	75.2	7.8	7.5	18.5	19.0
Renfrewshire	78.4	71.8	8.4	8.3	21.6	26.3
Scottish Borders	76.7	72.3	5.7	5.5	23.3	29.0
Shetland Islands	84.9	82.9	!	!	15.1	20.7
South Ayrshire	77.6	69.4	10.6	10.1	22.4	22.9
South Lanarkshire	78.0	73.1	6.4	6.3	22.0	25.7
Stirling	75.5	69.7	7.6	7.5	24.5	22.0
West Dunbartonshire	75.8	67.2	11.4	11.3	24.2	31.6
West Lothian	78.3	74.4	5.0	4.9	21.7	28.4

Source: Annual Population Survey (Nomis 25th February 2013)
! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).
* Estimate and confidence interval unreliable since the group sample size is small (3-9).
~ Estimate is less than 500.
- These figures are missing.

Inactivity for men aged 16 – 64 remained unchanged over the year, but fell by 5 thousand for women over the year.

In the year to September 2012 the changes in the reasons for inactivity were: student up 18 thousand, looking after family/home down 9 thousand, retired down 4 thousand and long term sick down 13 thousand. The numbers temporarily sick rose by 5 thousand. The majority 589 thousand did not want a job – but 194 thousand were inactive but wanted employment.

The most recent (seasonally adjusted) figure for Jobseekers allowance claimants (16+) in Scotland stood at 137 thousand in January 2013, down 5.2 thousand or 3.7% over the year (these figures are taken from table 7 in the Labour Market Statistics [First Release] February 2013. The claimant count rate at January 2013 stood at 5.0 per cent, or 6.4% for men and 3.4% for women (note these figures are taken from table 7 in the Labour Market Statistics and measure the number of claimants on the second Thursday of each month). The latest unemployment data at the Scottish constituency level is available in a SPICe Briefing.

Table 3 indicates the continuing significant differences in employment, unemployment and inactivity rates at the local authority level. In the year October 2011 – September 2012 employment rates varied from over 80% in Shetland and Orkney to between 65 - 70% in eight local authority areas and below 65% in three local authority areas. Likewise unemployment rates varied from 3.6% to 13.9%.

Table 4 provides some indications, although with reservations, of the changing pattern of employment since 2007/8, although it is difficult to argue for the strengthening of the 'hour glass model' of the labour market.

Table 4: Numbers and Percentages in employment by SOC (2010) October 2007 – September 2008 and October 2011 – September 2012

	Oct 2007 -Sep 2008		Oct 2011 - Sep 2012	
	Total	%	Total	%
Managers, directors and senior officials	223,700	8.8	205,500	8.3
Professional occupations	451,400	17.7	487,900	19.8
Associate prof & tech occupations	319,800	12.5	312,400	12.6
Administrative and secretarial occupations	298,800	11.7	262,700	10.6
Skilled trades occupations	313,900	12.3	280,800	11.4
Caring, leisure and other service occupations	234,700	9.2	236,900	9.6
Sales and customer service occupations	223,700	8.8	223,900	9.1
Process, plant and machine operatives	188,400	7.4	162,200	6.6
Elementary occupations	287,600	11.3	284,700	11.5

Source: *Annual Population Survey, NOMIS*
Notes: *Rounding means totals do not add to 100*

Total workforce job figures are a measure of jobs rather than people. Total seasonally adjusted jobs for the quarter ending September 2012 (the latest available figures) stood at 2,660 thousand (2,310 thousand employee jobs, 333 thousand self employed jobs, HM forces and supported trainees 17 thousand). Table 5 indicates the sectoral breakdown and provides some indication of both the impact of the recession and the recovery on sectors, although the trends need to be considered with some caution.

Table 6 outlines the changing patterns of full time and part time employment, and highlights the growth in the numbers of part time workers in Scotland, the latest data (October 2011 – September 2012), over the past year the number of employees has fallen by 14 thousand whereas the numbers of self-employed have risen by 16 thousand.

Table 6 indicates the numbers of full time workers in Scotland since the peak in employment have declined by 140 thousand whilst part time employment numbers recovered very quickly and are now 56 thousand higher and self-employed 30 thousand higher. The changing trends in full and part time employment since October 2007 – September 2008 are shown in figure 2. The rising number of self-employed indicates some substitution of self-employment for employment. The number of those working part time because they could not find a full time job is 55 thousand higher than the peak in employment, suggesting that increasing numbers of workers were taking part time employment in the absence of full time work.

Table 5: Total workforce jobs* by industry, Scotland, June 2006–2012 and Sep 2012 (thousands)

Industry	June 2006	June 2007	June 2008	June 2009	June 2010	June 2011	June 2012	Sep 2012
A : Agriculture, forestry and fishing	54	60	60	59	66	50	50	49
B : Mining and quarrying	28	30	30	29	31	30	35	38
C : Manufacturing	226	228	212	201	187	189	197	194
D : Electricity, gas, steam and air conditioning supply	10	13	16	19	21	18	19	20
E : Water supply; sewerage, waste management etc	18	17	16	14	113	19	19	18
F : Construction	194	203	199	185	173	179	174	179
G : Wholesale & retail trade; repair of motor vehicles etc	384	380	396	398	380	388	372	374
H : Transportation and storage	118	123	123	111	112	112	119	120
I : Accommodation and food service activities	190	188	191	186	179	190	199	199
J : Information and communication	73	79	69	68	69	74	80	77
K : Financial and insurance activities	107	91	98	100	91	92	87	83
L : Real estate activities	29	30	32	32	27	31	28	28
M : Professional, scientific and technical activities	154	161	176	174	171	183	219	215
N : Administrative and support service activities	180	192	200	185	197	191	200	200
O : Public administration & defence; social security	177	181	177	146	162	154	155	154
P : Education	200	192	208	208	197	200	197	196
Q : Human health and social work activities	399	383	398	401	381	372	373	374
R : Arts, entertainment and recreation	81	75	84	71	78	76	80	82
S : Other service activities	65	63	58	59	68	74	64	62

Source: *Labour Market Statistics (First Release), Scotland, February 2013*
* *Workforce jobs are a measure of jobs rather than people*
Note: *There are revisions from previous figures and as of September 2011 ONS are highlighting figures with a coefficient of variation greater than 25%*

The Annual Population Survey (workplace analysis) suggests that between October 2007 – September 2008 and October 2011 – September 2012 the trends in part time employment out performed those for full time employment in all age groups. In the 20 – 24 age group full time employment fell by 37,800 whilst part time employment rose by 13,200; for 25 – 49 full time employment fell by 73,300 but part time rose by 22,800 and for 50+ full time employment rose by 6,200 and part time by 28,100.

Figure 2 illustrates how the employment ‘recovery’ has been driven more by an increase in part time and self-employment. This changing pattern of employment may help to explain why the link between employment and GDP seems different to previous recessions. Table 6 (2) of the first release indicates that the usual hours of work of self-employed are lower than for full time employees and have declined. The service sector has not regained the level of productivity that was reached before the crisis, and staff may well be working as hard, although the volume of business had declined, or that the costs of closure of the business outweigh the losses of continuing to trade – the so called ‘zombie’ firm. Alternatively companies may well continue to ‘hoard’ labour due either to perceptions of skill shortages and recruitment difficulties, or due to the costs of redundancy. Alternatively structural changes in energy and extraction may be contributory factors, as might the belief that the economy is moving to less skilled and to a period of lower productivity. However, analysis of public sector trends (see the section in the Commentary) suggests that part time numbers have declined more than full time staffs.

Table 6: Trends in total, full, part time, temporary and part time who could not find a full time job.

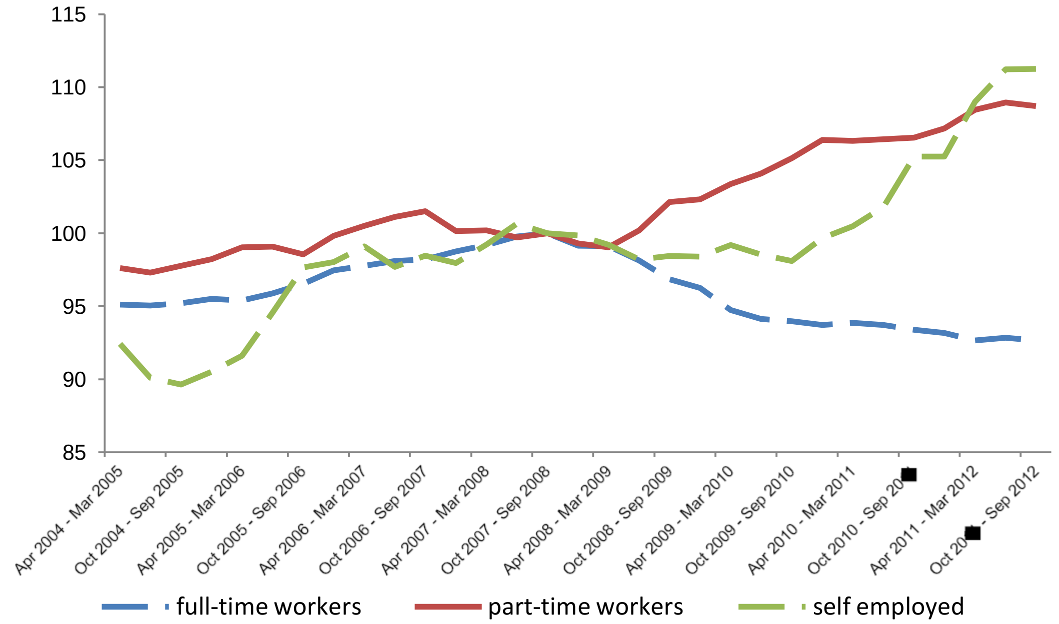
	All in employment							
	Total	Employees	Self employed	Full-time workers	Part-time workers	Workers with second jobs	Temporary employees	Couldn't find full-time job
Apr 2007 - Mar 2008	2,533	2,248	267	1,900	630	96	126	60
Jul 2007 - Jun 2008	2,544	2,254	271	1,912	629	98	125	61
Oct 2007 - Sep 2008	2,550	2,262	269	1,916	631	98	119	61
Jan 2008 - Dec 2008	2,529	2,243	268	1,900	626	99	116	64
Apr 2008 - Mar 2009	2,527	2,245	267	1,899	624	101	117	65
Jul 2008 - Jun 2009	2,515	2,235	264	1,880	632	103	123	73
Oct 2008 - Sep 2009	2,502	2,219	265	1,855	644	101	127	81
Jan 2009 - Dec 2009	2,492	2,210	265	1,844	645	102	133	84
Apr 2009 - Mar 2010	2,471	2,186	267	1,816	652	101	132	90
Jul 2009 - Jun 2010	2,464	2,181	265	1,804	657	99	126	96
Oct 2009 - Sep 2010	2,469	2,187	264	1,801	664	98	127	99
Jan 2010 - Dec 2010	2,472	2,185	268	1,796	672	97	125	107
Apr 2010 - Mar 2011	2,474	2,185	270	1,799	671	98	126	110
Jul 2010 - Jun 2011	2,471	2,181	274	1,796	672	95	131	114
Oct 2010 - Sep 2011	2,464	2,167	283	1,789	672	96	126	114
Jan 2011 - Dec 2011	2,464	2,167	283	1,785	676	96	121	114
Apr 2011 - Mar 2012	2,464	2,156	293	1,776	684	97	125	118
Jul 2011 - Jun 2012	2,473	2,156	299	1,779	687	100	118	115
Oct 2012 – Dec 2012	2,469	2,153	299	1,776	685	98	119	116

Source: *Labour Market Statistics (First Release), Scotland, February 2013*

Note: *1. Includes people who did not state whether they worked part time or full time*

2. The split between full time and part time employment is based on respondents' self classification

Figure 2 **Trends in full, part time and self-employment since April 2004 (Oct 2007 – Sept 2008 = 100)**



Tables 6 and 7 of the Labour Market statistics (first release) provide information of the claimant count. The figure for January indicates a total of 137,000 thousand claimants, down 5.2 thousand for the year. Of interest are the differing trends in the claimant count for men and women. The claimant count for men, 93 thousand, was down 5.6 thousand over the year, whereas the comparable figure for women, 44 thousand, was 0.4 thousand higher than a year ago.

Table 8 provides some limited indications of the experience of unemployment in terms of claimant count by age and duration. The latest figures suggest that 38.3 thousand have been claiming benefit for more than a year, up 8,700 over the year and 15.5 thousand have been claiming for more than 2 years, up 8.1 thousand (or 108.9%) over the year.

Table 8: Total claimant count and computerised claims by age and duration (Numbers and percentage change over year to February 2013)

	All computerised claims	All computerised claims Up to 6 months	All computerised claims Over 6 and up to 12 months	All computerised claims All over 12 months
All 16+ numbers	141,500	80,900	22,300	38,300
All 16+ % change over year	-6.3%	-6.8%	-9%	29.3%
All 18 – 24	37,100	24,300	5,900	6,900
All 25- 49	79,900	44,100	12,700	23,000
All 50 and above	23,600	11,800	3,600	8,400

Source: *Labour Market Statistics (First Release), Scotland, February 2013*

As we noted in the November Commentary there are concerns as to the increasing gap between the low and high paid, in respect of the effects of unemployment on health and on social cohesion; Wilkinson's and Pickett's analysis of the social consequences of inequality (2009) surfaced again in the debate as to the economic issues of independence. As we noted in the previous Commentary data from the OECD (2011) indicates that income inequality amongst working age persons has risen faster in the UK than in any other OECD country since 1975 as is now well above the OECD average. The share of the top 1% of income earners increased from 7.1% in 1970 to 14.3% in 2005; in 2012 this has increased to 15% of all income.

Public sector employment in Scotland continues to decline, although at a slower rate than previously. The latest data at the time of writing this section (Q3 2012) indicates that there were 581,300 (552,100 excluding public sector financial institutions) employed in the public sector in Scotland, a decrease of 11,700 (2.0%) over the year. Employment in the devolved public sector declined by 5,700 (1.2%) to 486,000, due mainly to declines local government employment (5,300) and further education (down 900).

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