

**Seminar Report  
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# The Implications Of Global Trends For The Labour Market In Jamaica

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## Introduction

The Jamaican economy is a highly open economy i.e. international economic transactions are large in relation to total economic activity. This is reflected in (a) the high export/GDP ratio, (b) the high import content of production and consumption, and (c) the importance of foreign capital inflows in gross investment. Given the importance of interaction with the world economy, global trends have important implications for all sectors of the Jamaican economy and society. Labour and the labour market in Jamaica will not be immune to the impact of developments in the global economy.

A review of the principal trends in the world economy is provided in Part I of the paper, and the implications of these trends for the labour market in Jamaica are discussed in Part II.

## PART I

### Global Economic Trends

The principal global economic trends are:-

#### 1. Globalization of production and finance

In recent years, international trade and capital flows have grown at a faster rate than world Gross Domestic Product (GDP).<sup>1</sup> This reflects the progressive globalization of production and finance<sup>2</sup> which is pressuring governments to minimize, harmonize or eliminate national barriers (e.g. tariffs, quotas, exchange controls) to the international movement of goods, services, capital and finance. The driving force impelling globalization is transnational corporate integration through mergers, strategic corporate alliances, and take-overs. Efficiency in resource allocation and profit maximization on a global scale

cannot be attained within a world economy fractured into national economies whose policies constrain the degrees of freedom. Transnational corporate integration impels multi-country market integration, initially in a regional context, both as ex-post economic rationalization and as a defence by the nation-state against the inevitable relinquishing of the vestiges of economic sovereignty.<sup>3</sup>

#### 2. Trade Blocs

The transition to a truly global market is taking place in the form of groups of national economies merging and amalgamating into trade blocs. The deepening of the integration process in the EEC and resurgence of regional trading arrangements<sup>4</sup> has given rise to a trend within the world economy towards the emergence of trade and/or economic blocs. This trend could lead to a compartmentalized global economy consisting of (a) an EEC enlarged to a European Economic Area (EEA) by absorbing EFTA and parts of Eastern Europe (b) a Western Hemisphere Free Trade Area, around a core of Canada, United States and Mexico and (c) some sort of free trade zone or arrangement,<sup>5</sup> linking the countries of South East Asia, or a grouping including Japan.<sup>6</sup> The North American Free Trade Area (NAFTA), encompassing Mexico, Canada and the United States constitutes a market of 363 million people, as compared to 300 million in the EEC. A Western Hemisphere Free Trade area would have a combined GDP of US\$6.8 trillion and would have a market of 719 millions,<sup>7</sup> exceeding US\$6.6 trillion and 372 million in the European Economic Area which came into existence 1st January, 1994.<sup>8</sup> Japan

and the newly industrialized countries of East Asia have a combined GDP of US\$3.2 trillion and a population of 199 million.<sup>9</sup> Countries, particularly developing countries, not included or associated with trading blocs could face steep protectionist barriers, and thereby be excluded from these major export markets. The result could be marginalization from the growth stimulating dynamic of the industrialized countries. This scenario is a distinct possibility for developing countries given the fierce rivalry between existing trade blocs.<sup>10</sup>

#### 3. Erosion Of Preferential Trade Arrangements

Developing countries can no longer plan for the continued existence of preferential trading arrangements. The developed countries no longer feel obliged to provide preferential trade arrangements to developing countries with minute markets, no indispensable raw materials and limited strategic importance. Developing countries must be prepared to adapt to the elimination or erosion of preferential trade regimes, e.g. the LOME Convention.

The benefits provided by the CBI could be reduced as the NAFTA has put CBI countries at a disadvantage in terms of access to the US markets as it provides Mexico with removal of tariffs and quotas over specified adjustment periods for products exempt from CBI treatment. This would inadvertently create a situation in which Mexico, which already has inexpensive labour, cheap energy, lower transportation cost and economies of scale, would now have a further advantage over the CBI countries. What has already happened and is likely to continue

and intensify is (a) diversion of US demand from suppliers in CBI countries to firms in Mexico thus reducing CBI exports. (b) Diversion of investment, which is already evident, as in the last few years there has been a pause in investment in the region, as investors waited to evaluate the NAFTA provisions.<sup>11</sup> (c) There is danger of a transfer or closure of existing productive capacity, particularly in "foot-loose" assembly industries.

#### 4. Slow Growth<sup>12</sup>

The decade of the 1980's was noteworthy for the low growth in industrialized countries and uneven growth in the developing countries. During 1990 and 1991 the economies of low income and middle income countries stagnated in terms of GDP per capita. The outlook is not encouraging as GDP growth in the G-7 countries declined from 2.8% in 1990 to 1.9% in 1991. This constrained demand for exports from developing countries and contributed to a 6% decline in non-oil commodity prices, which was the third consecutive year of decline in non-oil primary commodity prices in nominal dollar terms. The volume of merchandise exports from developing countries declined by 2%, however, growth in Latin America and the Caribbean increased marginally. The outlook is not encouraging for primary product exports as technological change is reducing demand by providing synthetic substitutes and reducing raw material input per unit of manufactured goods. During the period 1980 to 1991, primary commodities and, to a lesser extent, manufactured goods, export unit values of developing countries were on a downward trend relative to those of the developed countries. The decline for commodities was about 50 percent and for manufactures about 18 percent. Thus, developing countries, as a whole, have experienced a decline in net barter terms of trade, for both

manufactured goods and primary commodities.<sup>13</sup>

Foreign direct investments, including equities and bonds, to the developing countries have grown dramatically in the 1990's. But the direction of these flows has been uneven between regions and countries. Not more than 15 countries have been significant beneficiaries. The bulk of these investments have been to East Asia, notably China, and four countries in Latin America (Mexico, Argentina, Brazil, Venezuela and Colombia). The World Bank reports that official development assistance (ODA) declined in real terms by over 3% from its 1990 peak and grants have continued to decline. As a percentage of industrialized country donor's GNP, official development assistance has remained at 0.35% since 1985<sup>14</sup> U.S. foreign aid in real terms will continue to decline given the preoccupation with domestic issues, and the persistent fiscal deficit. In addition, the Caribbean share of a reduced U.S. foreign aid programme could also decline even further.

#### 5. Increased Mobility of Labour

The migration of unskilled and low skilled people, both legally and illegally from economically depressed areas, to areas where jobs and higher wages are available is likely to be more pronounced in the next decade or two, as population growth rates in developing countries persist at high levels, while these economies produce a limited number of new jobs most of which are at low wages. This will be a major economic problem and political issue as the industrialized countries will face an increasing number of migrants, creating a under-class or a low strata among the working class, which is racially, culturally and linguistically different from the rest of the Host societies. Industrialized countries will wage increasingly aggressive campaigns to

discourage and deport migrants from developing countries, at the same time benefitting from an inflow of highly-skilled, highly-trained workers, from these sources.<sup>15</sup>

#### 6. Technological Change

New developments in technology have been labour saving and has progressively reduced the raw material content per unit of finished goods.

##### (a) Labour Saving

American manufacturing production during the 1980s steadily increased but employment dropped steadily to where in 1988 it required only two fifths of the man-hours of labour it took in 1973 to manufacture the same volume of goods.<sup>16</sup> Developments in biotechnologies could have a major dislocating effect on agriculture. It will cause changes in the location of production and the method of production. Scientists have warned that there could be the elimination of major portions of the farming enterprise if field crops are grown in vitro. This, in turn, will displace farmers and farm workers.<sup>17</sup> Not all technological change is labour saving. Zuboff distinguishes between technology, which automates and that which informates, the former is labour saving and displacing and the latter is labour and productivity enhancing.<sup>18</sup>

##### (b) Raw Material Saving

The global economy is steadily becoming less material-intensive as Drucker<sup>19</sup> reports that some 60 percent of the costs of the representative industrial product of the 1920s, the automobile,, lay in raw materials and energy. The raw material and energy costs of the representative industrial product of the 1980's the semiconductor microchip, are less than 2 percent. Copper wire with a raw material and energy content of close to 80 percent is rapidly being replaced in

telephone cables by glass fibre with a raw material and energy content of 10 percent. Between 1965 and 1985, Japan increased its industrial production two and half times, while barely increasing its raw material and energy consumption at all. In 1985, U.S. manufactured products contained less than half as much raw material and energy as they had contained twenty years earlier. Aluminum use is a clear example, i.e. In 1972, a pound of aluminum (the metal from bauxite) produced 22 beer cans, but by 1989 it yielded 30 beer cans.<sup>20</sup>

### 7. Corporate Reorganization

Today's environment is dominated by constant, rapid change because the balance in the seller-customer relationship has shifted to customers, competition has intensified with globalization which has vastly increased the number of competitors and innovations in technology have induced changes. Companies have to be flexible, responsive, competitive, innovative, efficient, customer-focused. The traditional hierarchical, pyramidal organizational structure is too cumbersome and slow to respond effectively. This prompted a process of "re-engineering"<sup>21</sup>, that is, "the fundamental rethinking and radical redesign of business processes to achieve dramatic improvements in critical, contemporary measures of performance, such as cost, quality, service and speed"<sup>22</sup>. An important aspect of corporate reorganization is downsizing and decentralization, as large corporations reconstitute themselves as networks of small, often autonomous units. This trend to downsize is illustrated by the fact that since 1979 the Fortune 500 industrial companies have reduced their workforce by 25% or a total of 4.4 million.<sup>23</sup>

### 8. Rapid Growth of Services

The contribution of services to GDP and employment has increased in both developed and developing countries, since 1965.<sup>24</sup> Services

account for 61 percent of GDP in the industrialized countries and in developing countries the share ranges from 35-51 percent of GDP.<sup>25</sup> For example, it is projected that by the year 2005, sectors providing services will account for four out of five jobs in the U.S.A.<sup>26</sup>

### 9. Underdeveloped Regions in Europe

The political chaos and economic implosion of the former Soviet Union and Eastern Europe has led to the reintegration of these areas into the global economy. This has a number of harmful effects on developing countries as it has led to; (a) the diversion of aid and foreign investment, (b) the depression of commodity prices, and (c) the addition of a huge pool of cheap disciplined labour. Since 1990 there have been 60,000 joint ventures in Eastern Europe, with a foreign investment value of nearly US\$9 billion.<sup>27</sup> Many of the industries which rely on inexpensive labour in the developing countries will be turning increasingly towards location in Eastern Europe. In this context, the workers of both regions are competing for scarce capital and this could lower wages.

## PART II

### Implications for the Labour Market

Global trends will have profound implications for the labour market in Jamaica. The following trends are likely to occur but how and to what extent will depend on local conditions:

#### 1. Increased Demand for Service Workers

The rapid growth of tourism and health care in the world economy, particularly the industrialized countries will provide opportunities for developing countries. This will dramatically increase the demand for service workers. For example, the high cost of health care in the United States makes it cheaper for

someone to fly to Jamaica, have treatment, have a holiday, and still save. All operations, other than open heart surgery could be done in Jamaica at a fraction of the cost. The day is coming when there will be multi-national hospitals. A hospital in Washington D.C. may own a hospital in Jamaica, to which it would refer all cases requiring certain types of surgery e.g. cosmetic and reconstructive surgery and certain forms of rehabilitative treatment. There is also a huge market for retirement homes, where people require custodial care. Lower costs, climate, and the standard of health care in Jamaica will allow the provision of health care to visitors and retirement homes at a cost lower than that available in developed countries.<sup>28</sup> An increasing number of Americans are going to Mexico for treatment because the cost of a doctors' visit is much lower than the U.S. cost and some drugs are cheaper.<sup>29</sup>

#### 2. New Skills Required

The new dynamic sectors in the global economy are tourism, financial services, data processing, micro-electronics, biotechnology, telecommunications, robotics and health services. Export firms in Jamaica will have to develop the capacity to respond quickly to changes in demand in existing and new markets, in particular, that of the United States. This more than anything else is the secret of success of the newly industrialized export economies of Asia. Management, production and decision-making will have to be "informationalized".<sup>30</sup> The transition from low wage, labour intensive activities to technology, and information intensive activities will depend on the quality of human resources. The benefits of modern technology can only be garnered by an educated labour force. The work force will have to be more skilled, knowledge oriented and capable of adopting new technology.

### 3. Emergence of Knowledge Workers

In Reich's view, three broad categories of work are emerging with increasing divergence in remuneration leading to pronounced labour market segmentation and a skewed income distribution. The three types of work are routine production, in-person services and symbolic-analytic services. The symbolic-analysts also referred to as knowledge workers concentrate on problem solving and strategic-brokering by manipulating symbols generate the highest value added<sup>31</sup> and compete in a global labour market with high international mobility. Routine producers and in-person servers are immobile internationally but given the mobility of capital, technology and management their wages are influenced by lower wages in developing countries and labour saving technological innovation. By the year 2000 it is estimated that 70% of all jobs in Europe and the U.S.A. require cerebral rather than manual skills. One-half of these so called "brain-skill" jobs require personnel with university level education or the equivalent professional qualifications<sup>32</sup>.

### 4. Technically Adaptable Worker

The global economy has entered an era in which human capital is the main determinant of economic development and the primary form of investment is education and training.<sup>33</sup> Human capital, like physical capital, experiences depreciation because of the rapid obsolescence of technology and knowledge. The exponential rate of change in technology means that workers are increasingly being called upon to adapt to the many changes which are taking place in the work place and in the production process. Continuous retraining and upgrading of skills will be the order of the day. All of this must build on a solid educational foundation. The emphasis in education should be on

a solid and sound primary education, focused on mathematics and sciences. The school curricula must be made vocationally relevant, therefore the priority should be Technical Schools. The curriculum should include more practical, job related subjects, since only a small fraction of the total High School population will go on to University. This kind of programme for education would create a technologically oriented work force with a sound educational foundation, capable of high productivity, oriented to learning new technology and adaptable to new job skills.<sup>34</sup> Much needs to be done since only 3.6% of secondary school students were enrolled in technical, vocational and agricultural schools.<sup>35</sup>

### 5. Globally Competitive Manager/Professional

Management will have to become more sophisticated, be constantly in touch with developments in international markets, and continuously update itself on new technological innovations. Our managerial capacity has improved and professionalism has increased in recent years. However, there is still room for considerable improvement and we as a country should be willing to upgrade the management capacity of the private sector by importing skilled managers and other professionals. This need not mean a completely open door policy where foreigners, unaware of our culture and traditions take over top managerial posts. In the short run there are more than enough skilled Jamaicans overseas, who under the right circumstances would be willing to return to Jamaica. We must think of Jamaica not as a physical place but as a nation without borders.

### 6. Increased Productivity

The productivity of labour has to be continuously increased if Jamaica is to be competitive in the global market place. This has to be tackled both within the individual enterprise

and in the society as a whole. Firms need to put more emphasis on vocational training and on the job education, and managerial systems must facilitate and encourage worker productivity.<sup>36</sup>

For the society as a whole, education will have to become the first priority. The development of an educated work force is not necessarily going to mean spending more money, but it will require that expenditure be allocated differently so that more can be achieved by the same amount of expenditure. This will necessitate the reordering of the curriculum, to concentrate on English, Math and Science (both at the Primary and Secondary levels) by increasing the number of classroom hours devoted to these subjects, by a corresponding reduction in other subjects.

### 7. Small is Profitable

The conventional wisdom of the economics of production is that for most manufactured goods there are important benefits to be derived from increasing size. The size of the average firm in Jamaica has prevented the realisation of economies of scale and therefore output was costly compared to imports and uncompetitive in export markets. However, technology is making small scale production not only more viable but more profitable. Futurologist, John Naisbitt, speaks of a "global paradox" which exists because "the bigger the world economy, the more powerful its smallest players...As the world integrates economically, the component parts are becoming more numerous and smaller... The bigger and more open the world economy becomes, the more small and middle size companies will dominate".<sup>37</sup> The recent trend towards strategic corporate alliances<sup>38</sup> has made it possible for networks of small firms to overcome the limitations of size and compete effectively against large corporations, as small firms can specialize in a single aspect of production or distribution.

## 8. Spatial dispersal of employment

Jamaica also has the right factor mix, lower wages and close proximity to capitalize on the new global dispersal of employment made possible by new communications technology. Jamaica could be a haven for back-office operation, software design, data processing and accounting. This is already happening, for example, Swiss Air is moving its accounting department from Switzerland to Bombay, India.<sup>39</sup> The new communications technology has given increased mobility to professionals who can provide their services by telephone, facsimile and computer modem. Many of the "telecommuters", are relocating out of large cities to clean, quieter, rural environments e.g. the movement in the U.S.A. to settle in the Rocky Mountain States (Montana, Idaho, Wyoming, Colorado, Utah and New Mexico). In 1992, Utah led the U.S. in percentage growth in personal incomes and population.<sup>40</sup> Improved communications infrastructure and the quest for a quality of life based on an unspoilt environment and warm climate could make Jamaica one of the global growth poles for services.

## 9. More Women

There will be a higher rate of female participation in the workforce as women have less children and begin to penetrate occupations previously dominated by men. This process will be made easier as technology further reduces the reliance on physical strength. This trend could become pronounced in Jamaica where girls are achieving better results at the primary and secondary levels. Ironically, male hysteria about the take-over of certain professions by women belies the fact that the unemployment rate for women is about twice the rate for men 22.2% versus 9.4%.

## 10. Increased Self-Employed

Global competition, the rise of the

service sector and information technology have led to the emergence of the "knowledge-based" organization and fundamentally altered the way work is organized. The traditional pyramid like, hierarchical organization is being down-sized and recast as corporations will shed layers of management and support activities, while employing consultants and independent contractors and suppliers. A combination of a reorientation of the role of the state, the down-sizing of the government's bureaucracy, modernization of office equipment, and privatization will continue to trim employment in the central government. The reduction in public sector jobs and shifts in corporate organization will combine with the mechanization of agriculture, e.g. sugar cane harvesting and the growth of the informal sector to increase the number of self-employed. Already, self-employment accounts for over 40% of total employment.<sup>41</sup>

## 11. Nature of Work

Technological changes, in particular, computer-mediated communication i.e. the interaction of computers and tele-communications will change every aspect of work, recreation and human relations.<sup>42</sup> In the future, the nature of work itself will be transformed by technology and changing values. There will be increased self employment, part time work and temporary work, in contrast to long term employment with one or a few companies throughout a working life. This will be the case particularly for knowledge workers and professionals. More people will be working from home and on flexi-time than working 'nine to five' in office buildings.<sup>43</sup>

New life style goals, such as, the desire to spend more time with family particularly following birth of a child or during the early years of child rearing will lead more people to opt for flexi-time, working at home and special leave eg. paternity

leave.<sup>44</sup> An increasing number of people, most of them women, are becoming "contingent workers". Estimates of their numbers vary widely--from 13% to more than 30% of the work force. Since 1980, in the United States, the number of contingent workers has grown three times faster than the labour force as a whole. Only half of the new jobs created in 1992 were full time jobs. Reports indicate that Manpower Inc., the largest temporary agency in the US, is now the largest private employer, employing about 560,000 employees in 1993, almost twice as many as General Motors.<sup>45</sup> During the course of the working years most people will experience several career shifts which increasingly will involve retraining, but this will be seen as the norm rather than the exception.

## 12. Culture of the Work place

The relationship between management and workers and between different levels within the production process will have to change in a way which ensures incentives which maximize productivity. The interaction within the work place will have to be more cooperative and the divisions less rigid, permitting more dialogue between Trade Unions and management. It is imperative that the atmosphere become less adversarial and more genuinely interactive. The traditional notion of the worker will have to be abandoned and a new concept which recognizes worker participation in managerial decision and employee stock ownership programmes. These developments will require Trade Unions to expand their traditional role beyond wages and working conditions to include employment creation/preservation, education/training, and ownership participation. The fact that the number of work stoppages and strikes over the last couple of years have shown a reduction is an indication that this process has already begun.

In 1985, India exported US\$74 million in computer software increasing to over US\$500 million in 1993. Motorola's operation in India is 8,500 miles from its headquarters.

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