

2008年国際経済学会関西部会報告

『経済・通貨統合と拡大に伴う
ヨーロッパ経済の変容
—労働市場の変化を中心に—』

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報告概要

1. マクロ経済面および資本・労働の対抗関係から見たヨーロッパ経済の歴史的変遷－4つないし5つの時期区分とそれぞれの期の特徴－
2. 90年代半ば以降のヨーロッパ経済の復活の背景
3. ヨーロッパにおける労働市場改革と雇用及び労使関係の変化
4. リスボン戦略とFlexicurityアプローチの評価
5. ヨーロッパの社会モデルと経済の行方

1. マクロ経済面および資本・労働の 対抗関係から見たヨーロッパ経済 の歴史的変遷

1. 50年代から60年代末までの黄金期(高成長期)
 - 関税同盟の形成を通じた経済統合の進展
 - 雇用・経済成長優先のマクロ経済政策・為替レート政策
 - 国家による産業の保護・育成(選択的な信用配分や国有化、補助金等の保護・育成措置の提供)
 - 高い労働生産性と賃金の伸び、労働分配率の上昇
 - 所得の増加→内需の拡大→投資拡大の好循環
 - 福祉国家の形成

2. 70年代半ばから80年代前半までの不況期

- ブレトンウッズ体制の崩壊、石油危機、世界恐慌を経て、長期不況へ
- 経済統合の後退(非関税障壁による保護)
- 60年代末から労働者の攻勢(ネオコーポラティズムの確立)を経て労働分配率がピークへ。労働生産性を上回る賃金上昇
- ヨーロッパの産業の競争力・利潤率の低下
- ケインズ主義の失敗
- ヨーロッパの労働市場の「硬直性」や行過ぎた福祉国家への批判の台頭

 域内市場統合の推進(ネオリベラル路線への転換)

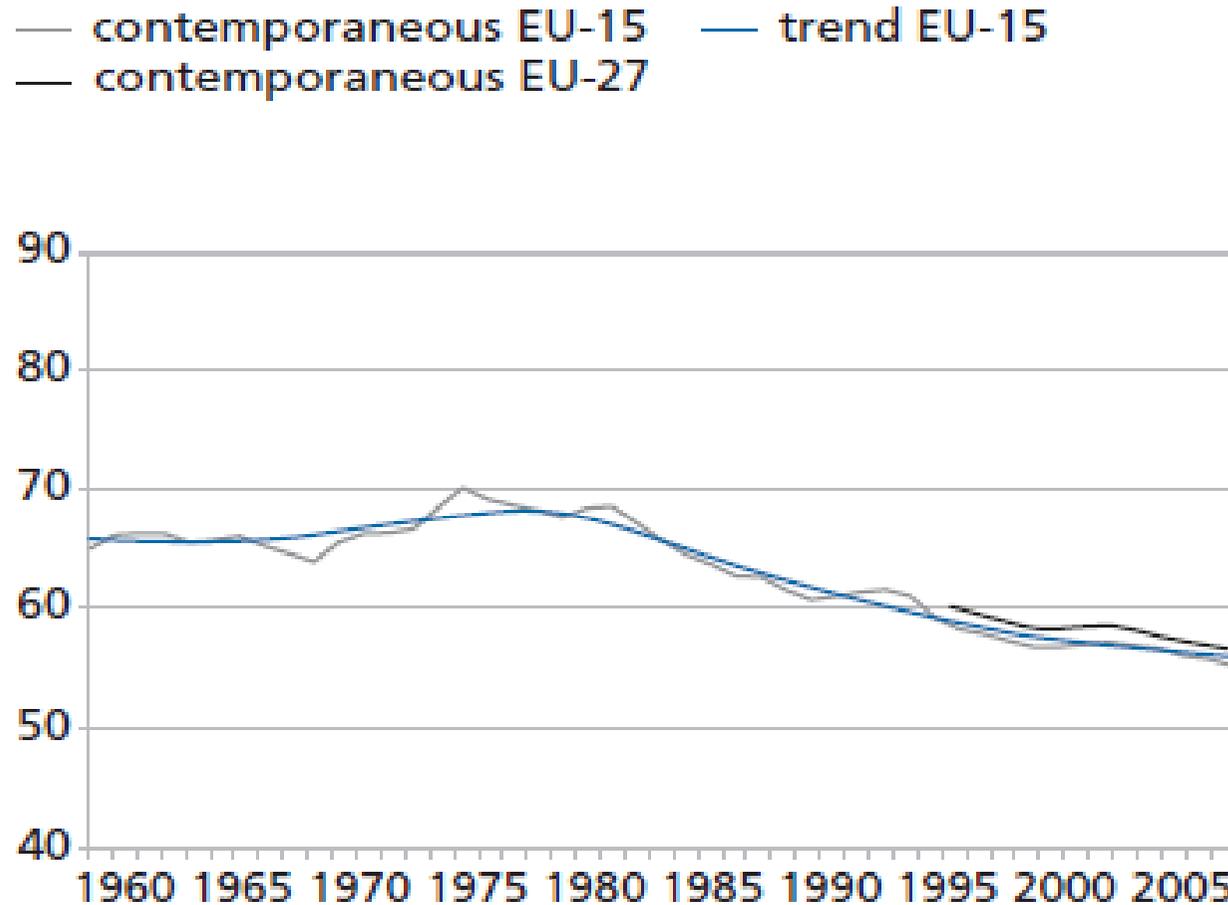
3. 80年代半ばから90年代半ばまでの調整期

- 域内市場統合およびEMUが軌道へ
- 財政・金融両面での強力なディスインフレ政策を通じた物価・賃金の抑え込みと為替相場の安定、それを通じた競争力の回復(特にフランス)
- 労働分配率と実質賃金の趨勢的低下へ。
- 内需の低迷と高失業。Two-handed approachの拒否。マーストリヒト不況。ヨーロッパにおけるケインズの死。
- 外需(特にアメリカ)依存型成長

4. 90年代後半から現在まで(拡大(2004年)の前と後にさらに時期区分)

- 域内市場統合とEMU、さらには経済のグローバル化の影響が本格的に発現。ヨーロッパの国家、企業、労働者の間におけるレジーム競争(税制や社会保障制度、労働条件や労働コストをめぐる競争)の激化
 - 労働分配率や実質賃金低下の継続。ヨーロッパ経済の競争力回復と利潤の上昇
 - 2004年のEUの中東欧への拡大が拍車。拡大EUレベルで賃金水準や労働条件の平準化のプロセス(中東欧の賃金水準上昇、西欧停滞)
 - 成長の回復と併せて失業率の著しい低下
-  ヨーロッパ経済の復活へ!?

Chart 1: EU-15 and EU-27



Source: AMECO database and own calculations.

Source: European Commission(2007), *Employment in Europe 2007*, p.240.

Table 1 - The labour income share in the EU-15 Member States – summary

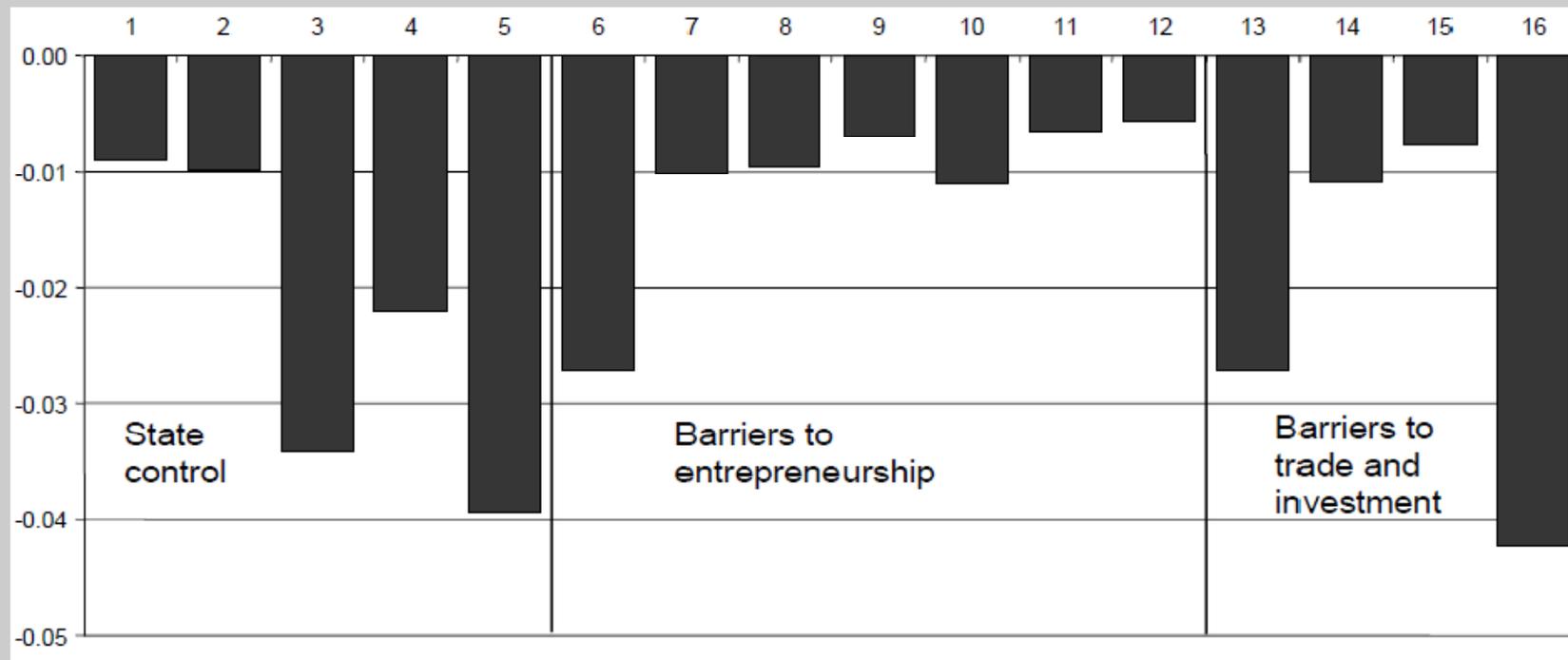
	Average	Coefficient of variation	Maximum		Minimum		ADF- t-value	Fluctuations		
	1960–2006		share	year	share	year		synchron.	persistence	variability
Belgium	61.3	5.5	66.9	1981	55.2	1961	-1.49	-0.0	0.67	0.67
Denmark	59.1	3.1	62.9	1975	56.3	2005	-2.98	-0.5	0.34	0.47
Germany	61.6	4.1	66.1	1974	55.9	2006	-1.49	0.2	0.54	0.42
Greece	66.5	12.5	91.9	1960	57.0	2003	-3.50	-0.3	0.40	0.78
Spain	62.4	5.8	67.9	1976	54.5	2006	-2.68	-0.0	0.71	0.49
France	61.4	5.3	66.9	1981	56.7	1998	-1.62	-0.4	0.62	0.63
Ireland	62.1	12.1	71.2	1975	47.1	2002	-1.59	-0.5	0.45	0.54
Italy	62.5	8.5	69.7	1975	53.3	2000	-1.76	-0.5	0.43	0.64
Luxembourg	52.6	7.1	62.2	1977	46.4	1969	-2.20	-0.4	0.42	0.66
Netherlands	63.0	5.7	70.4	1975	56.7	2006	-2.09	-0.1	0.54	0.54
Austria	66.2	6.9	72.9	1978	55.8	2006	-1.52	-0.3	0.50	0.69
Portugal	67.0	9.4	87.9	1975	59.6	1969	-1.80	-0.2	0.60	1.14
Finland	62.5	8.0	70.3	1966	53.7	2000	-2.74	-0.2	0.57	0.55
Sweden	62.1	5.8	69.2	1977	55.4	1995	-2.77	-0.1	0.67	0.75
United Kingdom	65.3	2.8	72.2	1975	61.8	1997	-4.07	-0.2	0.61	0.70
EU-15	64.2	5.6	69.9	1975	57.8	2006	-1.72	-0.1	0.65	0.51
Japan	68.0	6.4	76.4	1975	60.2	2006	-1.77	-0.6	0.69	0.61
United States	63.7	1.8	65.9	1970	60.9	2005	-2.49	-0.1	0.53	0.34

Source: AMECO database and own calculations.

Note: Coefficient of variation: standard deviation of labour share divided by mean; maximum/minimum share: maximum/minimum value recorded for the share; maximum/minimum year: year in which the maximum/minimum was observed; ADF t-value: t-value for augmented Dickey-Fuller test (unit root test with constant and trend); fluctuations-synchron: correlation between trend-deviation in labour income share and trend-deviation in GDP; fluctuations-persistence: coefficient of auto-correlation; fluctuations-variability: standard deviation of fluctuations in labour income share divided by standard deviation of fluctuations in GDP.

Source: European Commission(2007), *Employment in Europe 2007*, p.240.

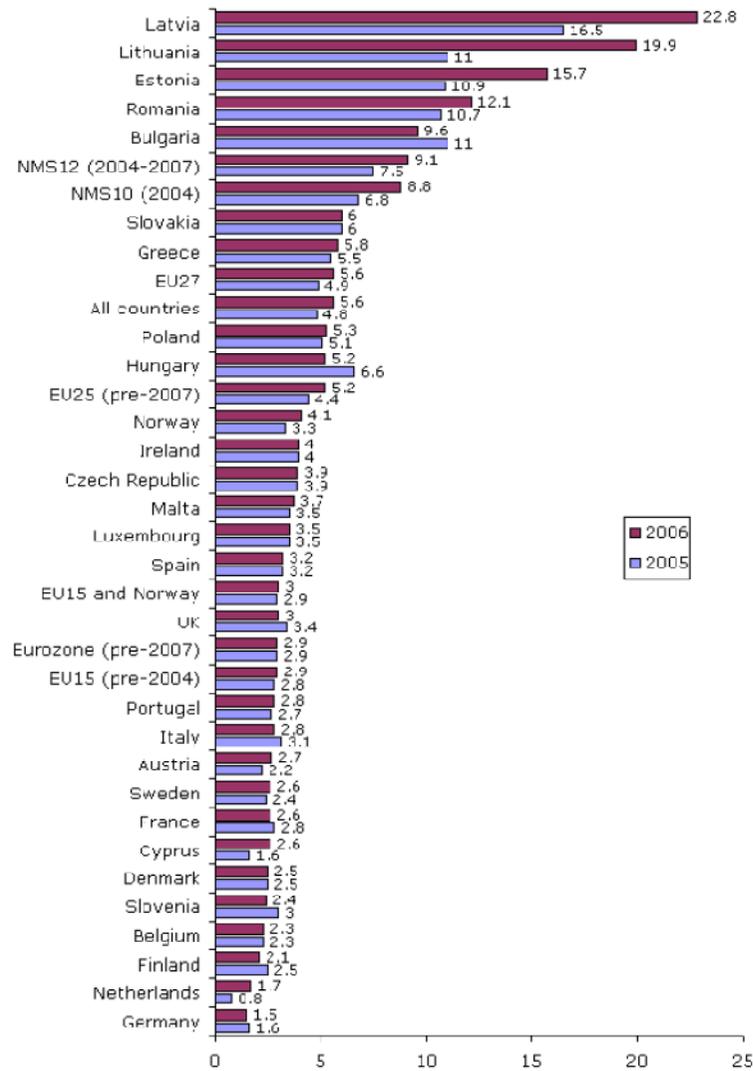
Figure 3-13: Sources of change in EU18⁶⁰ product market regulation, 1998 to 2003



- | | |
|--|--|
| 1 Scope of public enterprise sector | 9 Administrative burdens for sole proprietor firms |
| 2 Size of public enterprise sector | 10 Sector specific administrative burdens |
| 3 Direct control over business enterprise | 11 Legal barriers |
| 4 Use of command & control regulation | 12 Antitrust exemptions |
| 5 Price controls | 13 Ownership barriers |
| 6 Licence and permits system | 14 Discriminatory procedures |
| 7 Communication and simplification of rules and procedures | 15 Regulatory barriers |
| 8 Administrative burdens for corporation | 16 Tariffs |

Source: Ilzkovitz, F., Dierz, A., Kovacs, V. & Sousa, N. (2007), 'Steps towards a deeper economic integration: the Internal Market in the 21st century, A contribution to the Single Market Review', *European Economy, Economic Papers*, No.271. p.46.

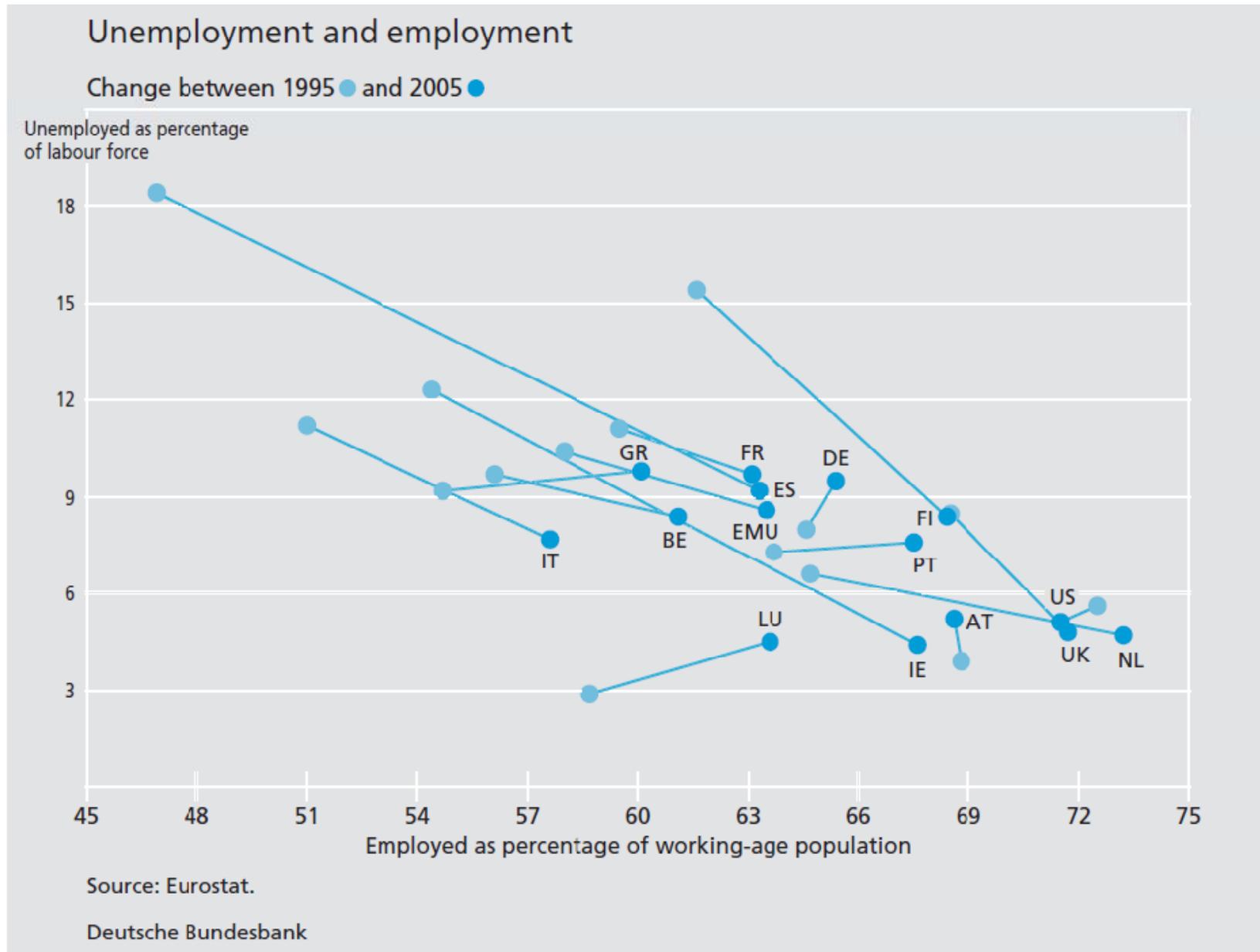
Figure 1: Average collectively-agreed pay increases, 2005 and 2006 (%)



Average collectively-agreed pay increases, 2005 and 2006 (%)

The data in Figure 1 should be read in conjunction with the notes in Appendix 1.
Source: FIRO

Source: European Foundation for the Improvement of Living and Working Condition (2007), *Pay developments 2006*, p.4



Source: Deutsche Bundesbank(2007), The labor market in Germany: general developments in an international context', *Monthly Report*, January, p.33.

2. ヨーロッパ経済復活の要因

1. 労働分配率・実質賃金の低下(=利潤の増大)

- 80年代以降の趨勢的な労働分配率・実質賃金の低下。60年代よりも低い水準へ。アイルランド(ケルトの虎)のケース: 1980年から2006年の間平均-2.62%。他のほとんどのヨーロッパ諸国でも低下。ユーロ圏で構造的な不況に苦しむポルトガルのケース: 1990年代以降労働分配率の低下が停止。

Table 3 - Components of the labour income share by country: EU-15 (average annual growth rates)

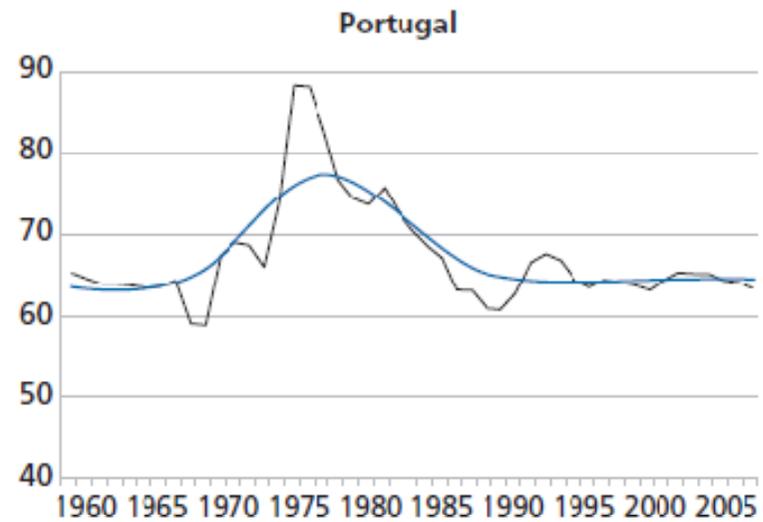
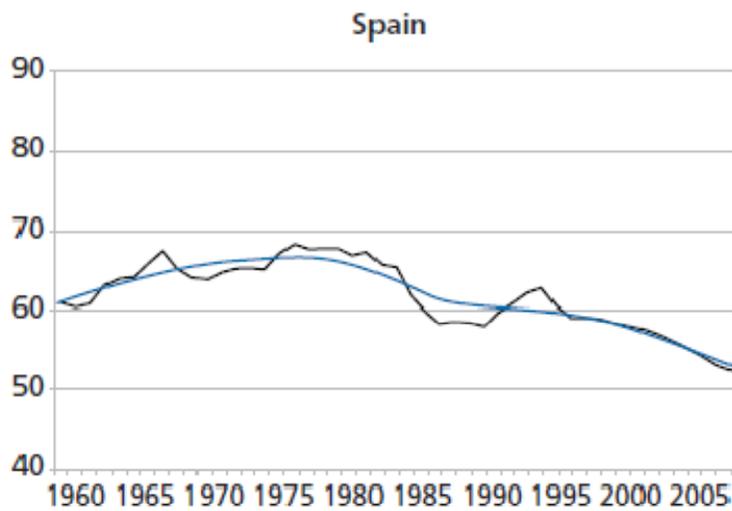
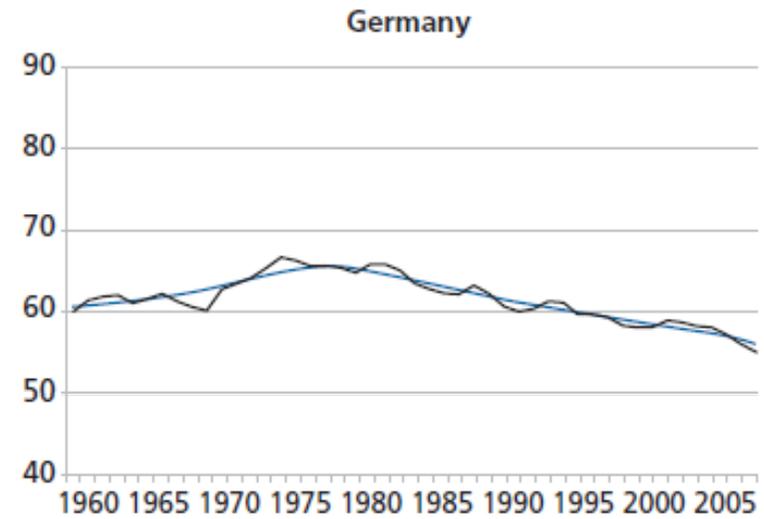
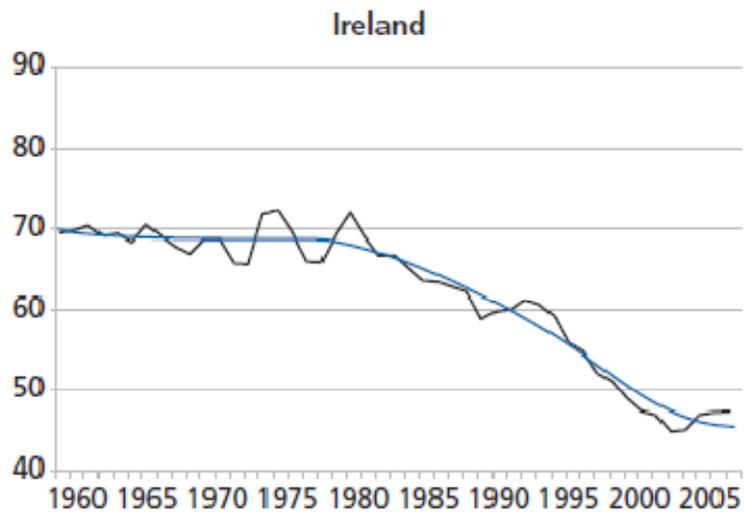
	Period 1960–1980				Period 1981–2006			
	Labour share	Real wage ¹	Capital-to-output ratio	(inverted) Capital-to-labour ratio ¹	Labour share	Real wage ¹	Capital-to-output ratio	(inverted) Capital-to-labour ratio ¹
Belgium	0.84	0.11	-0.83	1.56	-0.40	-0.40	-0.03	0.03
Denmark	0.48	0.03	-0.66	1.11	-0.39	-0.84	-0.59	1.05
Germany	0.40	NA	0.22	NA	-0.60	-1.08	-0.05	0.18
Greece	-1.76	-0.60	1.12	-2.28	-0.46	-0.31	0.70	-0.85
Spain	0.40	0.22	-0.59	0.76	-0.78	-0.59	0.57	-0.76
France	0.33	0.39	0.04	-0.10	-0.58	-0.66	0.14	-0.06
Ireland	0.16	1.17	1.18	-2.18	-1.40	-2.62	-1.29	2.51
Italy	-0.03	-0.04	-0.43	0.43	-0.76	-0.75	0.41	-0.42
Luxembourg	1.04	-0.26	-1.10	2.40	-0.80	-1.64	-0.88	1.72
Netherlands	0.91	0.82	0.47	-0.39	-0.75	-1.39	-0.32	0.96
Austria	0.01	0.21	-0.23	0.03	-0.89	-0.72	0.40	-0.57
Portugal	0.58	-0.44	-1.83	2.85	-0.55	-0.11	1.13	-1.58
Finland	-0.30	-0.12	0.01	-0.19	-0.58	-1.38	-0.92	1.72
Sweden	0.28	0.63	0.43	-0.78	-0.62	-0.99	-0.37	0.75
United Kingdom	0.17	0.13	-0.06	0.09	-0.14	-0.52	-0.65	1.04
Japan	0.02	-0.04	-0.28	0.34	-0.77	-0.47	0.76	-1.06
United States	0.00	-0.38	-0.69	1.07	-0.27	-0.51	-0.37	0.62

Source: AMECO database and own calculations.

Note: 1: Measured in efficiency units. Efficiency units are available for Germany as of 1991. Averages for Germany are averages of available data.

Source: European Commission(2007), *Employment in Europe 2007*, p.244.

— contemporaneous — trend

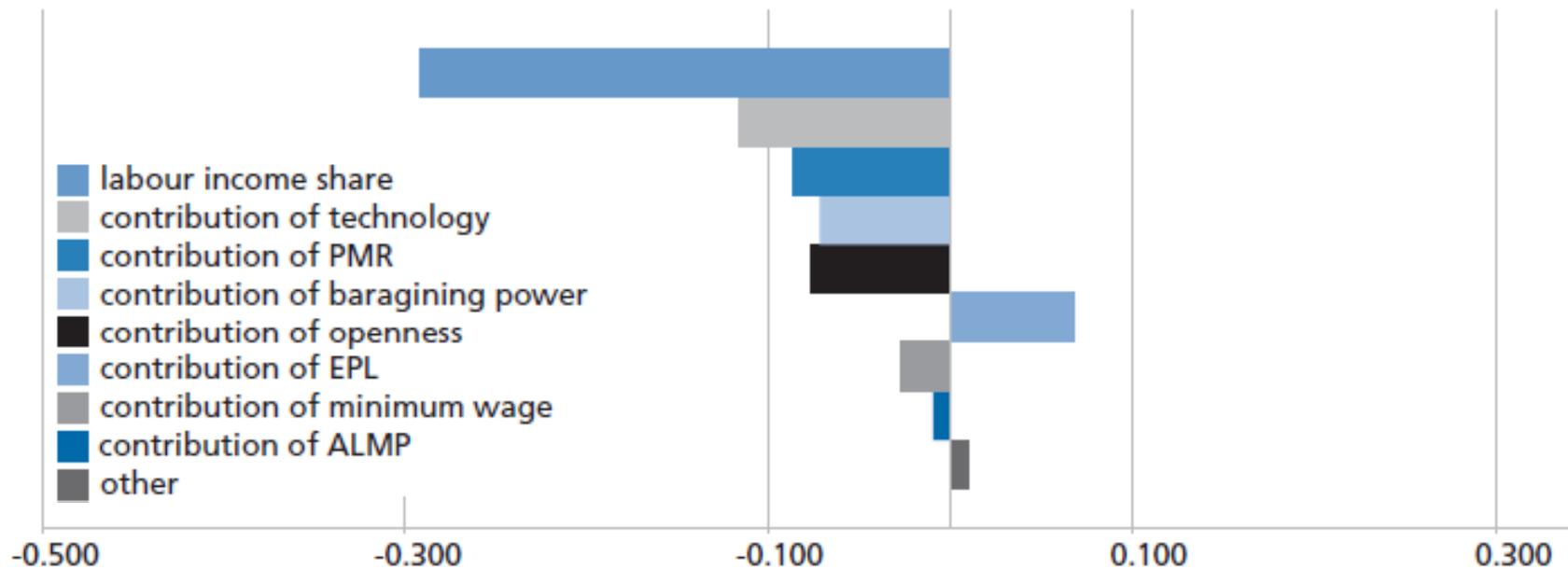


Source: European Commission(2007), *Employment in Europe 2007*, p.242 - 3.

何故労働分配率の趨勢的な低下や実質賃金の下落が起きているのか？

- 技術の変化：高い労働コストが省労働力(資本集約)的な技術へのシフトを通じて労働力の過剰を生み、労働分配率の低下や失業の増加をもたらした。
- 知識資本主義への移行：少数派の高スキルの労働者の所得を増加させる一方で、多数派の中・低スキルの労働者の所得を低下させた。
- 経済のグローバル化に伴う国際競争の激化：途上国(特にヨーロッパの場合は中東欧諸国の安いコストの労働者)との競争
- 株主資本主義・ファンド資本主義と呼ばれるコーポレートガバナンスの変化
- 労働市場の諸制度(労働組合の組織率、賃金・労働条件交渉、雇用契約や労働法制等)の変化

Chart 15: Change in labour income share in EU-11: total
(percentage points, annual averages)



Note: EU-11 includes Belgium, Denmark, Germany, Spain, France, Italy, the Netherlands, Austria, Finland, Sweden and the United Kingdom.

Source: European Commission(2007), *Employment in Europe 2007*, p.258.

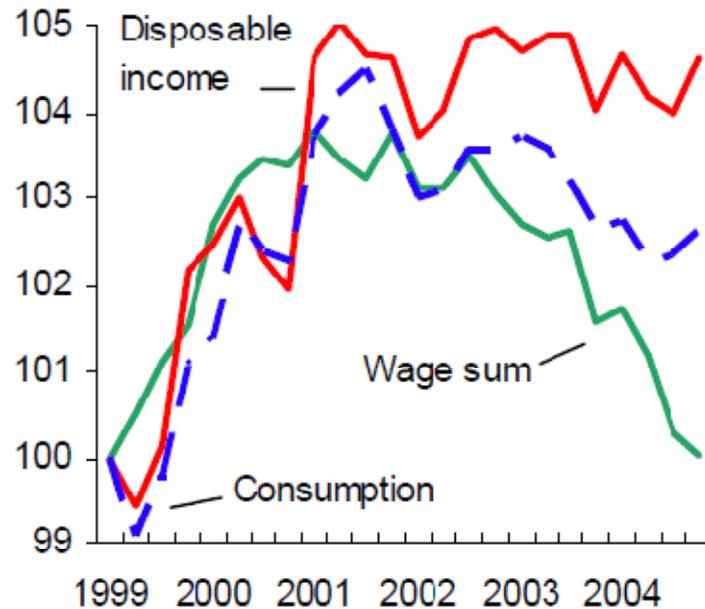
実質賃金の引き下げが経済の復活をもたらしたドイツのケース

- ユーロへの参加により名目為替レートが固定された下での物価・賃金の抑制→実質為替レートの減価を通じた国際競争力の回復→輸出の拡大を通じた企業収益の改善→景気拡大へ

(かつてのブレトンウッズ体制下のそれとほとんど同じ経済発展パターン)

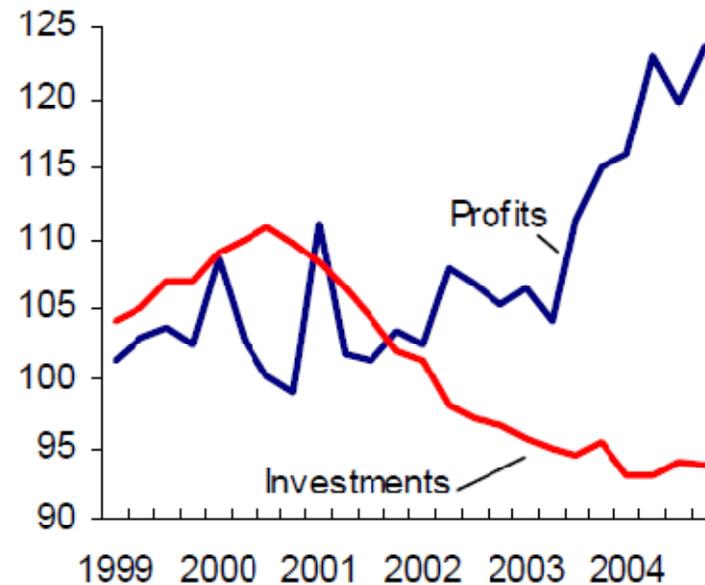
しかし、賃金の抑制は個別企業あるいは個別国民経済にとっては競争力の改善につながるが、マクロ経済的には内需抑制、また他国との関係では近隣窮乏化策になりうる。いわゆる「実現問題」。これを救ったのが、外需(アメリカ、EU内ではイギリス、スペイン、中東欧等)の拡大！

Chart 3: Consumption constrained by stagnant incomes



All data seasonally adjusted and at constant prices; 1999Q1 = 100.
Source: Bundesbank.

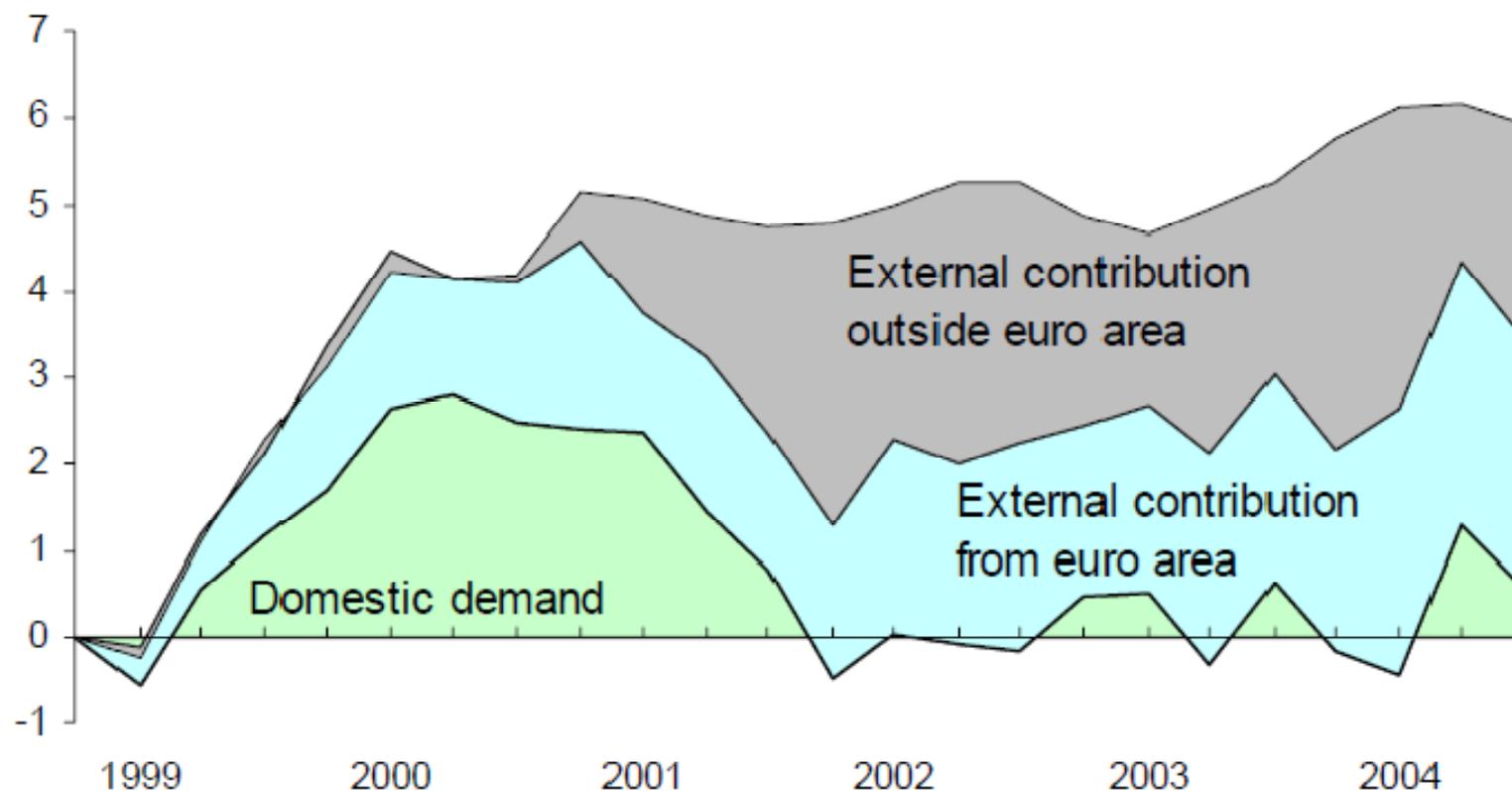
Chart 4: Profits decoupled from investment



Seasonally adjusted quarterly figures in billion euros.
Source: Bundesbank.

Jansen, H.(2005), Domestic gloom and export boom: a look at German competitiveness, *ECFIN Country Focus*, European Commission, Vol.2. Issue 6, p.3.

Chart 2: Contribution to real GDP growth (cumulative changes since 1999 Q1)



*Seasonally adjusted at constant prices; 1999Q1 = 100;
Source: Bundesbank, own calculation.*

Jansen, H.(2005), Domestic gloom and export boom: a look at German competitiveness, *ECFIN Country Focus*, European Commission, Vol.2. Issue 6, p.2.

2. 低金利と高利潤によって生じた資産価格の高騰及びそれによる消費・投資拡大(資産効果)

- アメリカ及びヨーロッパ諸国で生じた不動産や金融資産価格の上昇(←企業収益や配当の増大)→資産所得の急激な増加→実物投資よりも不動産や金融資産への更なる投資→資産効果による経済成長の牽引

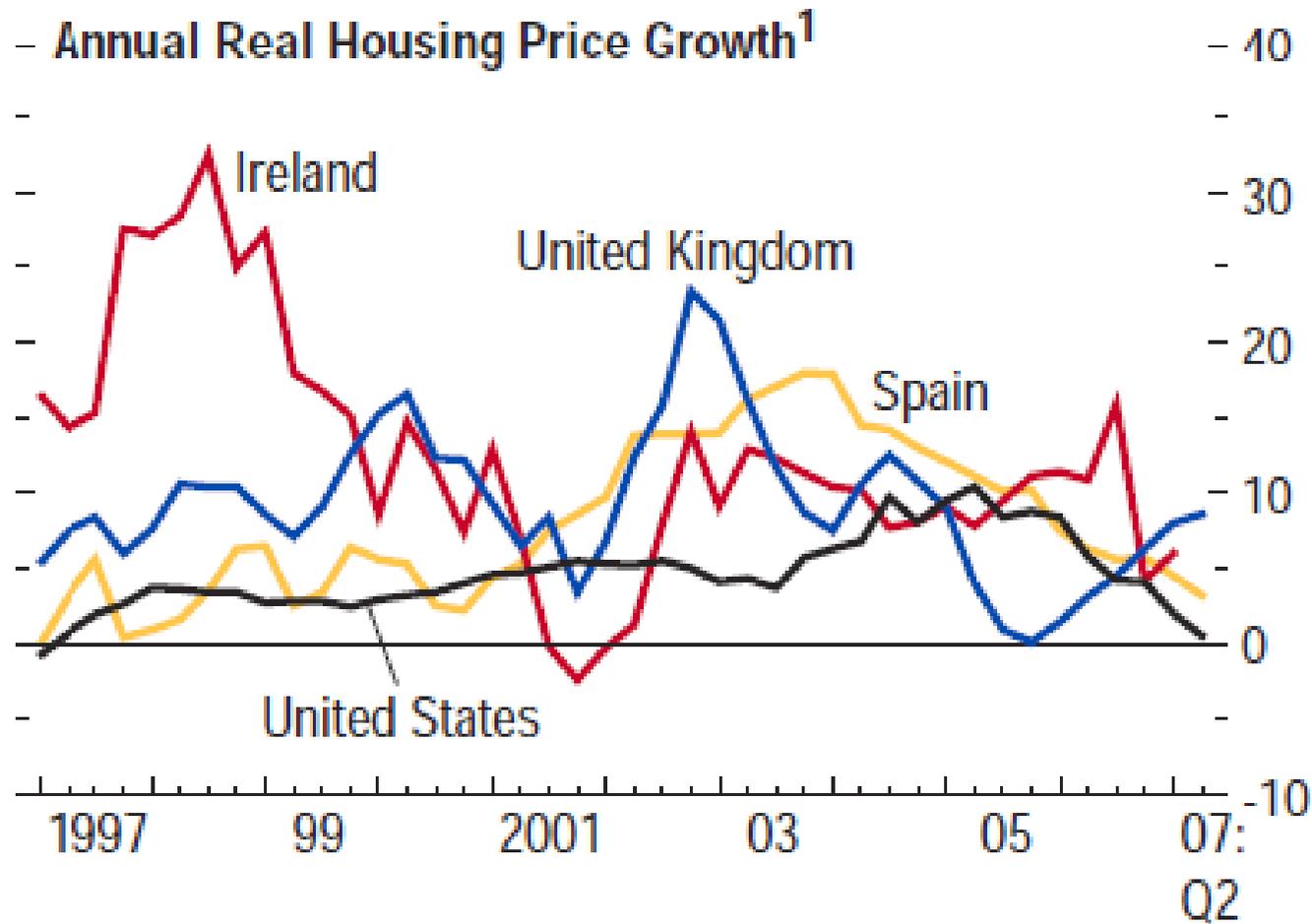
VS.

黄金期の経済成長パターンとの対比:

50,60年代は継続的な賃金の上昇(労働分配率の増加)が消費(内需の拡大)を生み、経済成長や雇用の拡大へ。

Housing Price Developments

(Percent change)



Source: IMF(2007), *World Economic Outlook*, October, p.72.

加熱する中東欧諸国（特にバルト諸国）の景気とリスク

- バルト諸国では、賃金と不動産、金融資産価格の上昇が一時に生じている。巨額の資本流入による信用の増加と著しいインフレ（資産インフレも含む）の発生。ブーム及び事実上のユーロペッグの結果としての著しい経常収支不均衡の発生（アジアの通貨危機前夜の状況に酷似）。賃金の増加は、労働力の西欧向け流出による人手不足が大きな要因。生産性の上昇の伴わない賃金の上昇は、いずれ限界にぶつかる。

Table 2.5. Emerging Europe: Real GDP, Consumer Prices, and Current Account Balance

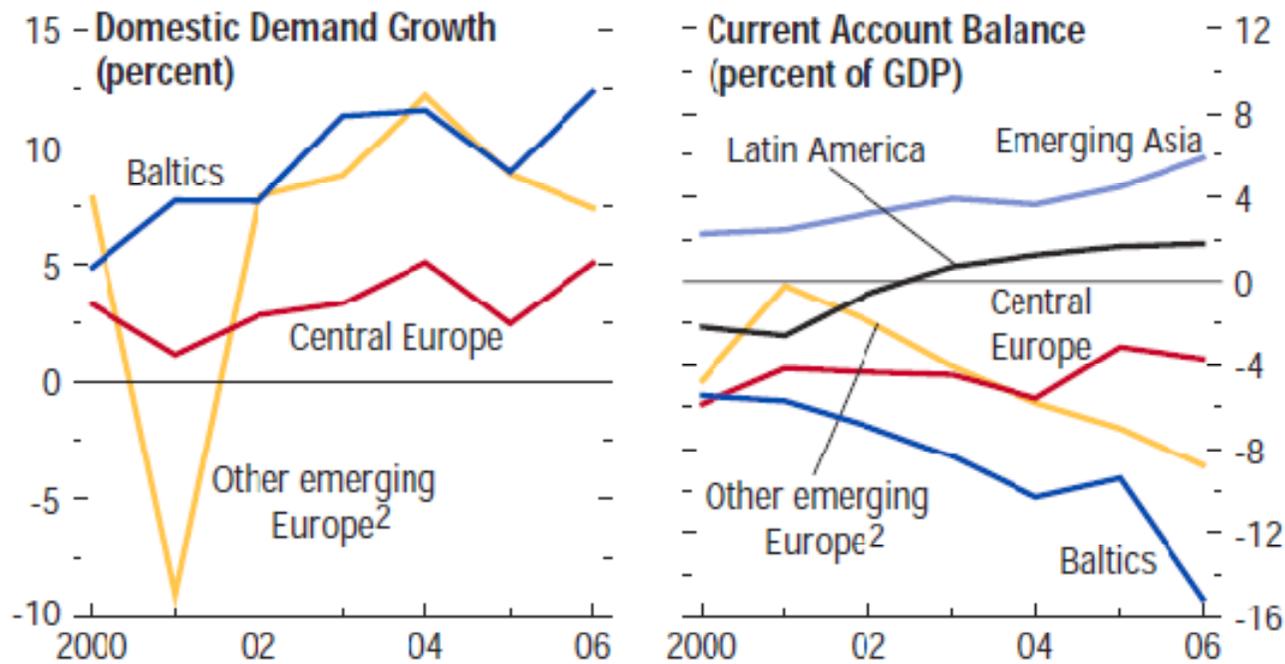
(Annual percent change unless noted otherwise)

	Real GDP				Consumer Prices ¹				Current Account Balance ²			
	2005	2006	2007	2008	2005	2006	2007	2008	2005	2006	2007	2008
Emerging Europe	5.6	6.3	5.8	5.2	4.9	5.1	5.1	4.1	-5.2	-6.6	-7.3	-7.5
Turkey	7.4	6.1	5.0	5.3	8.2	9.6	8.2	4.6	-6.2	-7.9	-7.5	-7.0
Excluding Turkey	4.9	6.4	6.1	5.2	3.5	3.2	3.8	4.0	-4.8	-6.0	-7.3	-7.8
Baltics	9.0	9.7	8.8	6.3	4.2	4.8	6.5	6.4	-9.4	-15.1	-18.3	-18.3
Estonia	10.2	11.2	8.0	6.0	4.1	4.4	6.0	7.0	-10.0	-15.5	-16.9	-15.9
Latvia	10.6	11.9	10.5	6.2	6.7	6.5	9.0	8.9	-12.6	-21.1	-25.3	-27.3
Lithuania	7.6	7.5	8.0	6.5	2.7	3.8	5.2	4.6	-7.1	-10.9	-14.0	-12.6
Central Europe	4.5	6.0	5.8	4.9	2.4	2.1	3.3	3.3	-3.2	-3.7	-4.1	-4.7
Czech Republic	6.5	6.4	5.6	4.6	1.8	2.5	2.9	4.4	-1.6	-3.1	-3.4	-3.5
Hungary	4.2	3.9	2.1	2.7	3.6	3.9	7.6	4.5	-6.8	-6.5	-5.6	-5.1
Poland	3.6	6.1	6.6	5.3	2.1	1.0	2.2	2.7	-1.7	-2.3	-3.7	-5.1
Slovak Republic	6.0	8.3	8.8	7.3	2.8	4.4	2.4	2.0	-8.6	-8.3	-5.3	-4.5
Southern and south-eastern Europe	4.5	6.8	6.0	5.7	7.0	6.0	4.6	5.1	-8.7	-10.5	-13.6	-13.1
Bulgaria	6.2	6.1	6.0	5.9	5.0	7.3	8.2	7.9	-12.0	-15.8	-20.3	-19.0
Croatia	4.3	4.8	5.6	4.7	3.3	3.2	2.3	2.8	-6.4	-7.8	-8.4	-8.8
Malta	3.3	3.3	3.2	2.6	2.5	2.6	0.6	2.0	-8.0	-6.1	-9.4	-8.2
Romania	4.1	7.7	6.3	6.0	9.0	6.6	4.3	4.8	-8.7	-10.3	-13.8	-13.2
<i>Memorandum</i>												
Slovenia	4.1	5.7	5.4	3.8	2.5	2.5	3.2	3.1	-1.9	-2.5	-3.4	-3.1

¹Movements in consumer prices are shown as annual averages. December/December changes can be found in Table A7 in the Statistical Appendix.

²Percent of GDP.

Source: IMF(2007), *World Economic Outlook*, October, p.89.



Sources: IMF, *International Financial Statistics*; and IMF staff calculations.

¹CE: central Europe; OEE: other emerging Europe; EA: emerging Asia; LA: Latin America.

²Other emerging Europe includes Bulgaria, Croatia, Malta, Romania, and Turkey.

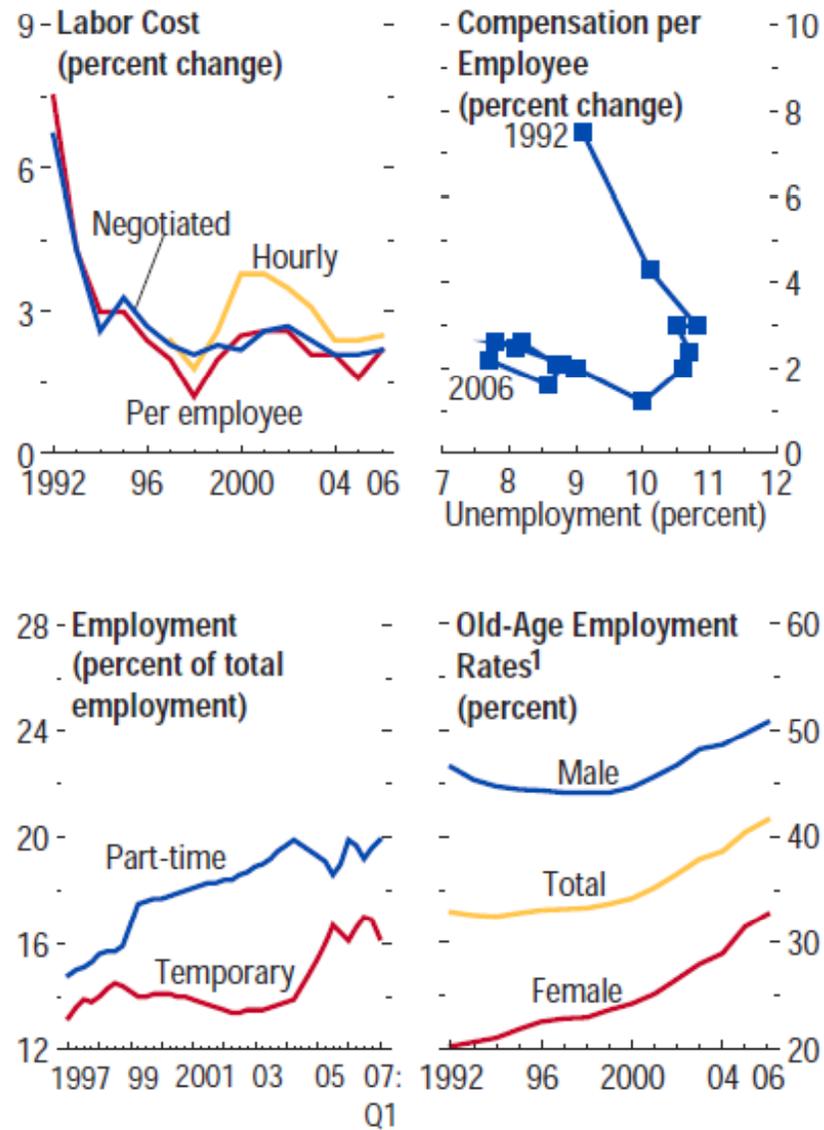
³LA: Latvia; LT: Lithuania; HU: Hungary; ES: Estonia; SK: Slovak Republic; CZ: Czech Republic; RO: Romania; PL: Poland; CR: Croatia; and TU: Turkey.

⁴Fiscal impulse is calculated as the first difference in structural balance, adjusted, where appropriate, to isolate the demand impact of fiscal policy by excluding EU grants and privatization receipts from revenues and excluding payments to the EU from expenditures.

⁵SSE: southern and southeastern Europe.

Source: IMF(2007), *World Economic Outlook*, October, p.90.

Labor Market Indicators for the Euro Area



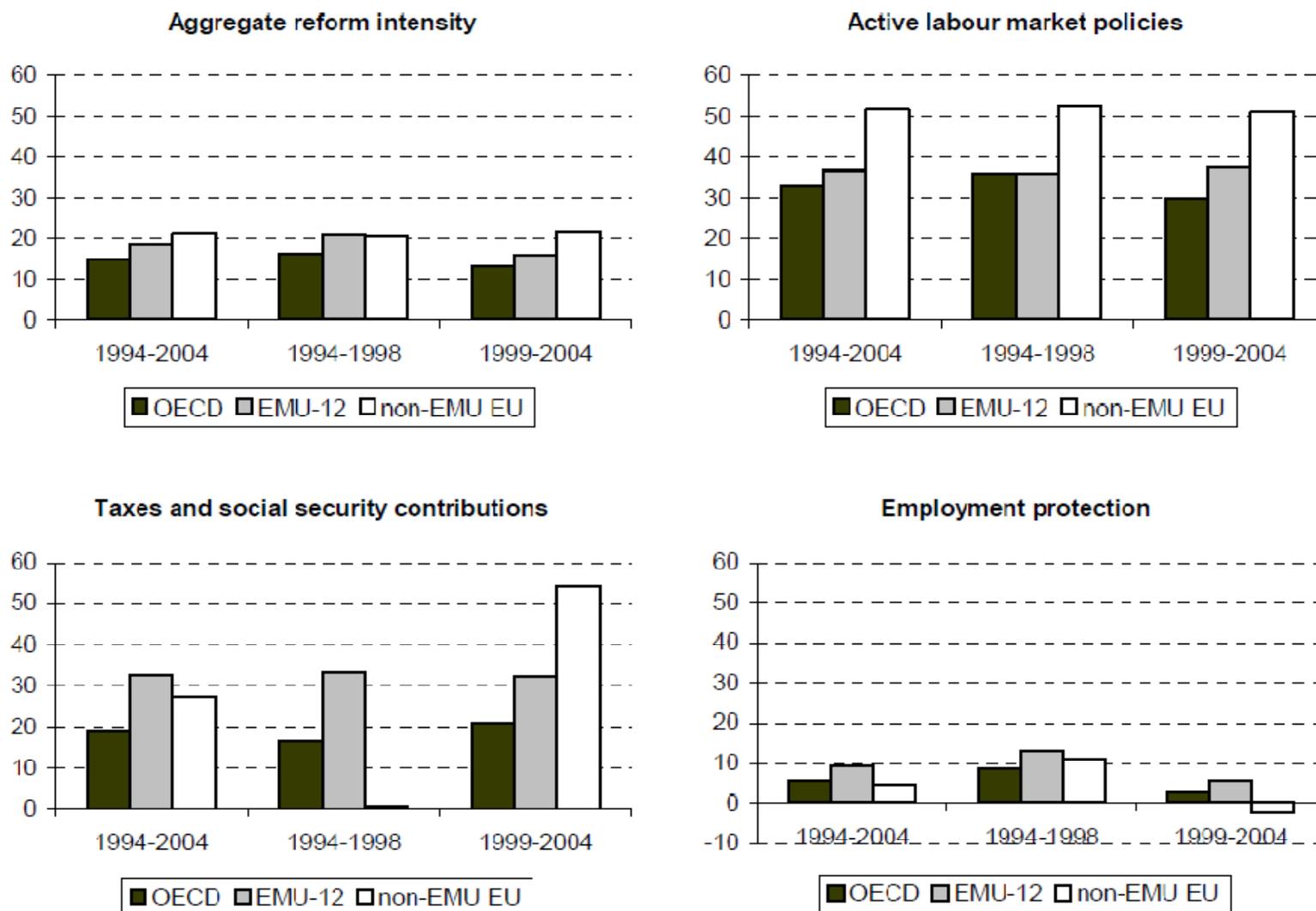
Source: IMF(2007), *World Economic Outlook*, October, p.79.

3. EU諸国における労働市場改革と雇用・労使関係の変化

1. 90年代末以降のEU諸国における労働市場改革の特徴

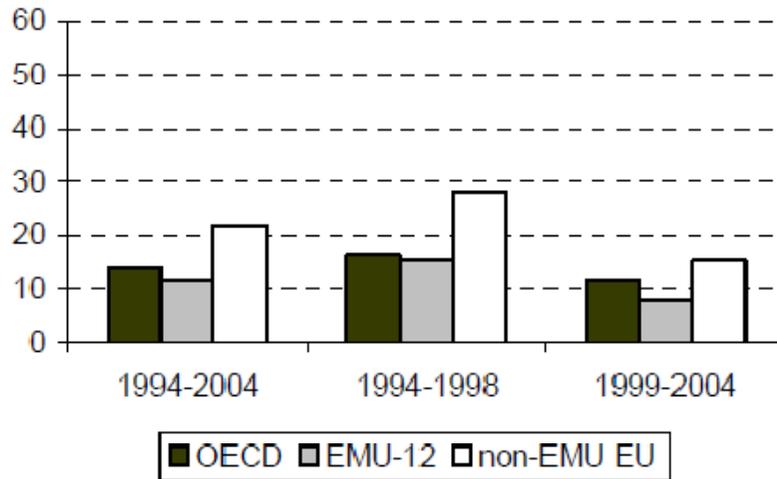
- EU諸国における労働市場改革の内容、取り組みの度合いは国によってまちまち。
- 正規雇用の領域では、大きな改革は行われず。
- 一般に、ユーロ不参加国(特にデンマーク、スウェーデン)が労働市場改革に熱心で、成果を挙げている。EMUの構造改革への圧力は限定的？
- ユーロ参加国で目立つのは、非正規雇用分野における労働市場の規制緩和(例. 解雇規制の緩和、労働時間の弾力化、退職スキームの見直し、職業斡旋・ワークフェアの強化など)。

Figure 5. Intensity of labour market reforms in OECD countries, 1994-2004
(per cent of maximum possible score)

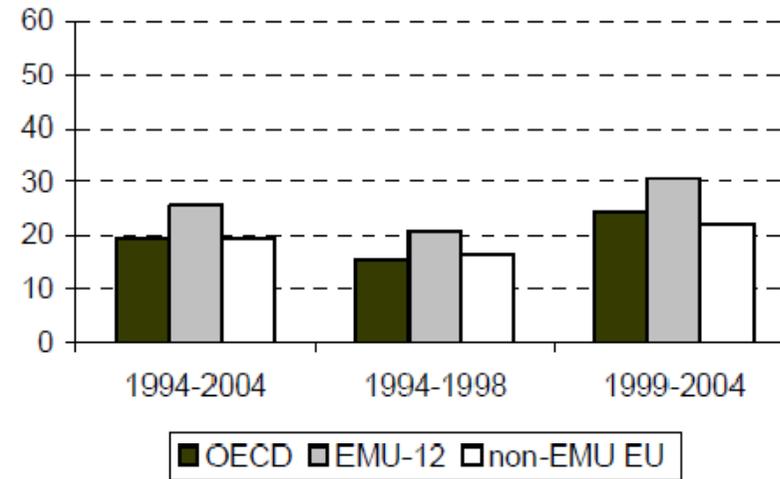


Source: Duval, R. & Elmeskov (2006), *The Effects of EMU on structural reforms in labour and product markets*, ECB Working Paper, No.596, p.20.

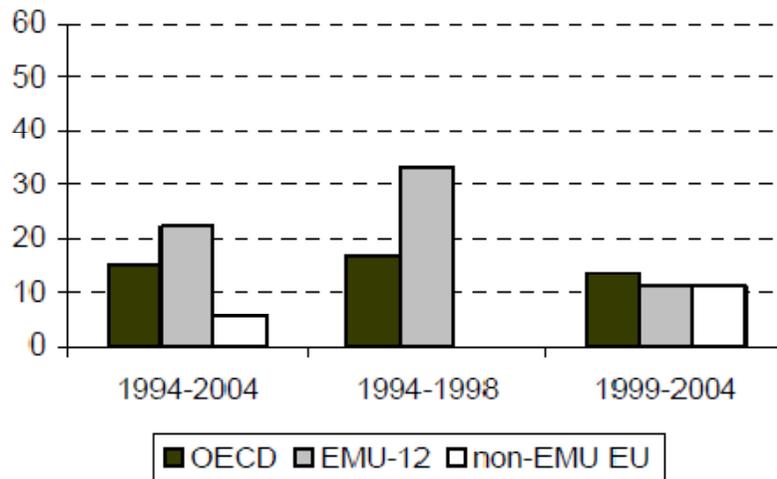
Unemployment benefit systems



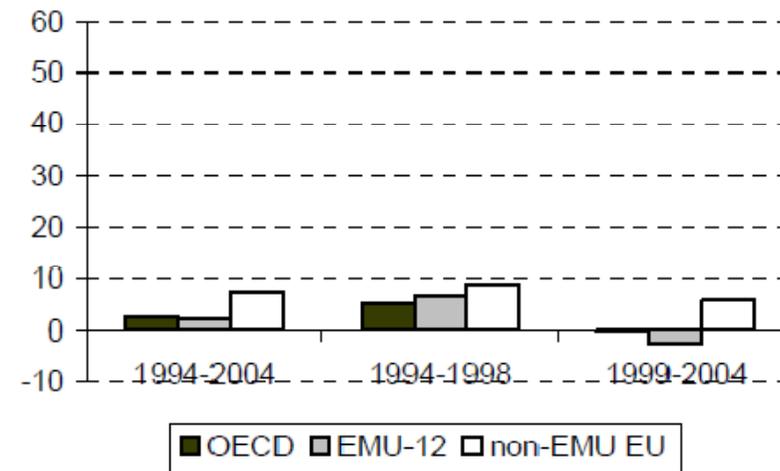
Retirement schemes



Working-time flexibility and part-time work

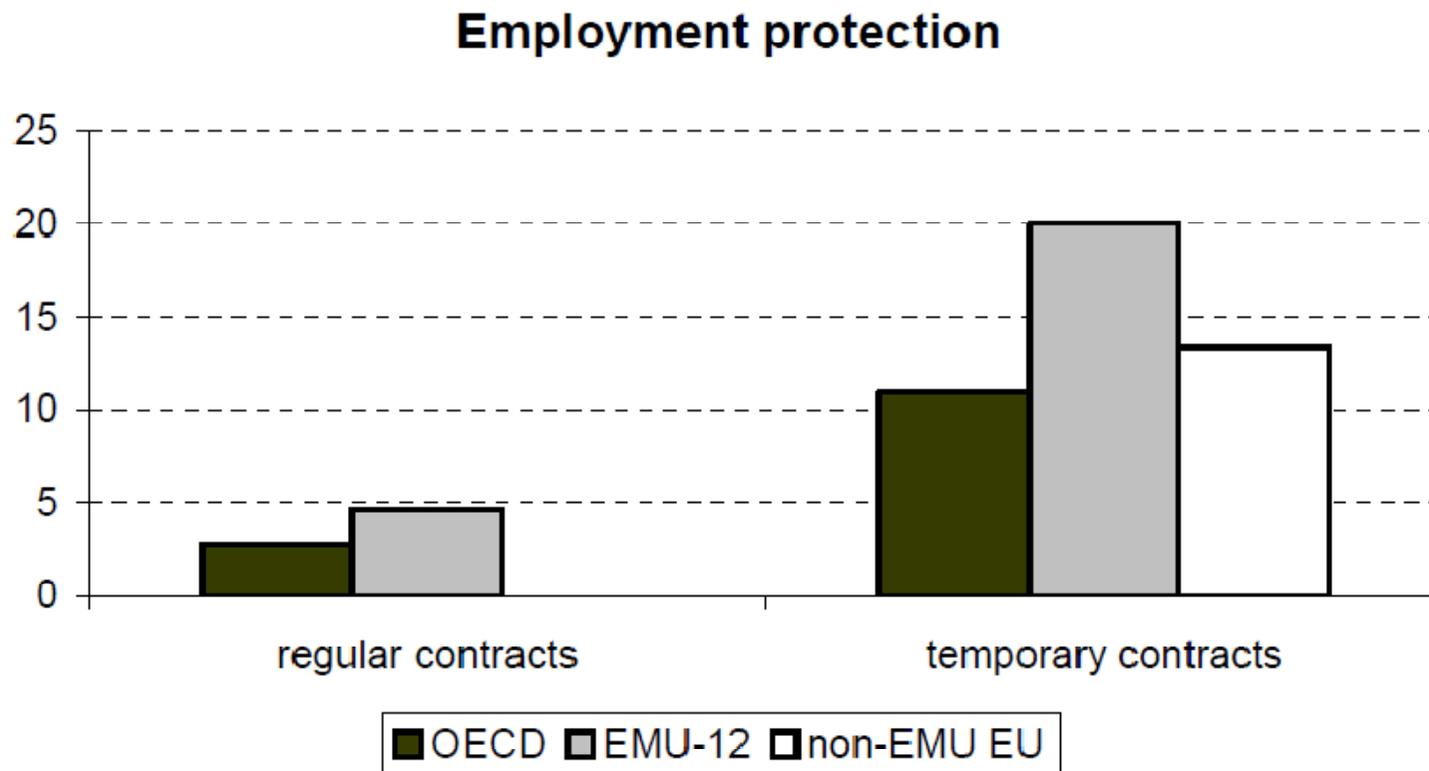


Wage formation and industrial relations



Source: Duval, R.& Elmeskov(2006), The Effects of EMU on structural reforms in labour and product markets, *ECB Working Paper*, No.596, p.20.

Figure 6. Intensity of labour market reforms in specific areas, 1994-2004
(per cent of maximum possible score)



Source: Duval, R.& Elmeskov(2006), The Effects of EMU on structural reforms in labour and product markets, *ECB Working Paper*, No.596, p.22.

Table 1. Aggregate reform intensity indicator, reform intensity indicators by area:¹ 1994-2004

	Summary reform intensity indicator ²		Reform intensity indicator by area ²						
	Score	Ranking	Active labour market policies	Taxes and social security contributions	Employment protection legislation	Unemployment benefit system	Wage formation and industrial relations	Working-time flexibility and part-time work	Early retirement, invalidity and old-age pension schemes
Australia	21.0	7	54	25	-7	19	27	0	17
Austria	17.8	8	15	31	13	23	2	17	33
Belgium	21.4	6	40	44	10	15	5	33	17
Canada	15.2	13	38	13	0	23	0	17	17
Czech Republic	6.2	28	17	0	-3	12	-5	-17	33
Denmark	29.3	1	56	13	10	42	27	17	25
Finland	25.0	3	48	13	13	35	0	17	50
France	14.5	16	42	31	-7	0	-5	33	42
Germany	23.9	4	58	13	17	19	9	17	25
Greece	13.8	17	42	13	7	12	5	17	-8
Hungary	12.3	19	31	25	-7	19	-9	0	33
Iceland	3.6	30	19	-38	0	19	0	0	8
Ireland	17.4	9	46	88	-10	15	-14	0	0
Italy	21.7	5	31	56	23	-12	5	33	50
Japan	8.7	25	23	-13	13	4	0	33	8
Korea	12.3	19	27	0	25	8	0	17	8
Luxembourg	14.9	15	33	38	0	4	-5	33	33
Mexico	4.3	29	8	0	0	0	14	17	0
Netherlands	25.7	2	56	25	13	12	14	33	42
New Zealand	12.3	19	42	19	-13	15	-5	0	33
Norway	15.2	13	46	-19	10	27	0	17	8
Poland	11.2	23	29	0	-3	15	5	17	25
Portugal	15.9	12	23	25	17	8	5	33	17
Slovak Republic	13.0	18	12	25	14	19	0	17	8
Spain	10.5	24	8	19	17	8	7	0	8
Sweden	17.4	9	50	13	13	12	5	0	8
Switzerland	8.7	25	23	6	0	15	0	17	0
Turkey	6.5	27	4	0	13	8	0	33	8
United Kingdom	16.7	11	50	56	-10	12	-9	0	25
United States	11.6	22	19	50	0	12	0	0	0
OECD average	14.9	15.3	33.0	19.0	5.6	14.0	2.6	15.0	19.2
EU-15 average	19.1	9.5	39.9	31.7	8.4	13.6	3.3	18.9	24.4
EMU-12 average	10.5	10.1	36.9	32.0	9.4	11.5	2.3	22.2	25.7
non-EMU EU	21.1	7.0	51.9	27.1	4.4	21.8	7.6	5.6	19.4
EMU-bigs	17.7	12.3	34.6	29.7	12.5	3.8	4.0	20.8	31.3
EMU-smalls	19.0	9.0	38.0	34.4	7.9	15.4	1.4	22.9	22.9

1: EMU-bigs: France, Germany, Italy and Spain.

 EMU-smalls: Austria, Belgium, Finland, Greece, Ireland, Luxembourg, Netherlands and Portugal.

2: all reform intensity indicators are expressed as a percentage of the maximum possible score, i.e. the score that would be obtained if all possible reforms were implemented. See main text for details.

Source: Brandt, Bumiaux and Duval (2005).

Source: Duval, R.& Elmeskov(2006), The Effects of EMU on structural reforms in labour and product markets, *ECB Working Paper*, No.596, p.21.

表3

Table 11: Strictness of Employment protection legislation

[Index: from 0 for no restriction to 6]

(i)	Regular contracts			Temporary contracts		
	1994	2003	change	1994	2003	Change
Austria	2.4	2.4	0	1.8	1.5	-0.3
Belgium	1.7	1.7	0	3.6	2.6	-1
Czech Republic	3.3	3.3	0	0.5	0.5	0
Denmark	1.5	1.5	0	2.3	1.4	-0.9
Finland	2.3	2.2	-0.1	1.9	1.9	0
France	2.4	2.5	0.1	3.6	3.6	0
Greece	2.7	2.7	0	2.8	1.8	-0.8
Germany	2.3	2.4	0.1	4	3.3	-0.7
Hungary	1.9	1.9	0	0.8	1.1	0.3
Ireland	1.6	1.6	0	0.4	0.6	0.2
Italy	1.8	1.8	0	3.8	2.1	-1.7
Netherlands	3.1	3.1	0	1.9	1.2	-0.7
Poland	2.2	2.2	0	1.1	1.3	0.2
Portugal	4.2	4.2	0	3.1	2.8	-0.3
Slovak Republic	3.1	2.5	-0.6	0.8	0.4	-0.4
Spain	2.8	2.6	-0.2	3.3	3.5	0.2
Sweden	2.9	2.9	0	1.8	1.6	-0.2
UK	1	1.1	0.1	0.3	0.4	0.1

Source: OECD

出所 ETUC/CES, BUSINESSEUROPE, UEAPME and CEEP (2007), *Key Challenges facing European Labour Markets: A Joint Analysis of European Social Partners*.p.21.

2. EU諸国における雇用構造の変化

1. 雇用の改善とその内容

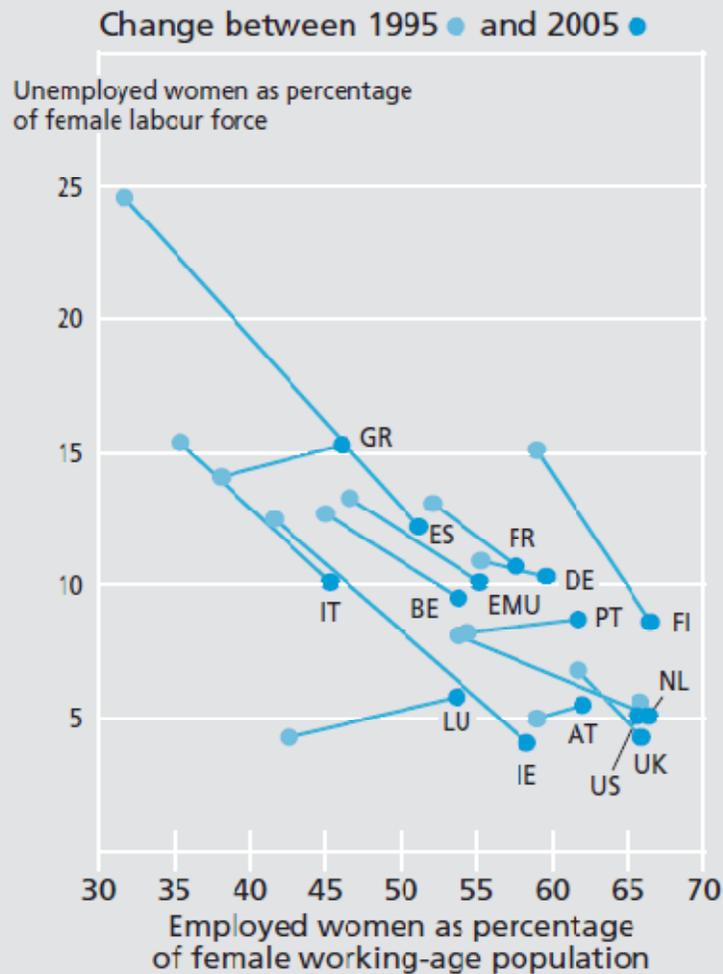
- 急速な雇用の増加に伴う失業率の急激な減少（特に2005年以降、中東欧諸国で顕著）
- 女性及び中高年労働者の雇用の増大。他方、若年雇用の伸びは停滞。長期失業も停滞。
- サービス産業を中心に、労働生産性の低い、低賃金の非正規雇用（パートタイム、有期限雇用）の著しい増大

2. 雇用増加の背景

- 景気回復、中東欧経済の成長
- 賃金の穏健化
- 労働市場改革の「成果」: 非正規雇用の規制緩和、失業給付制度、社会保障制度改革等

しかし、それほど抜本的な労働市場改革が行われない中での雇用の急速な改善は、「ヨーロッパの労働市場の硬直性」の批判への疑問を提起。他方、雇用の改善は見たが、労働生産性の低迷、労働者のスキル別所得格差拡大へ（スウェーデン、フィンランドでさえ格差拡大!）。

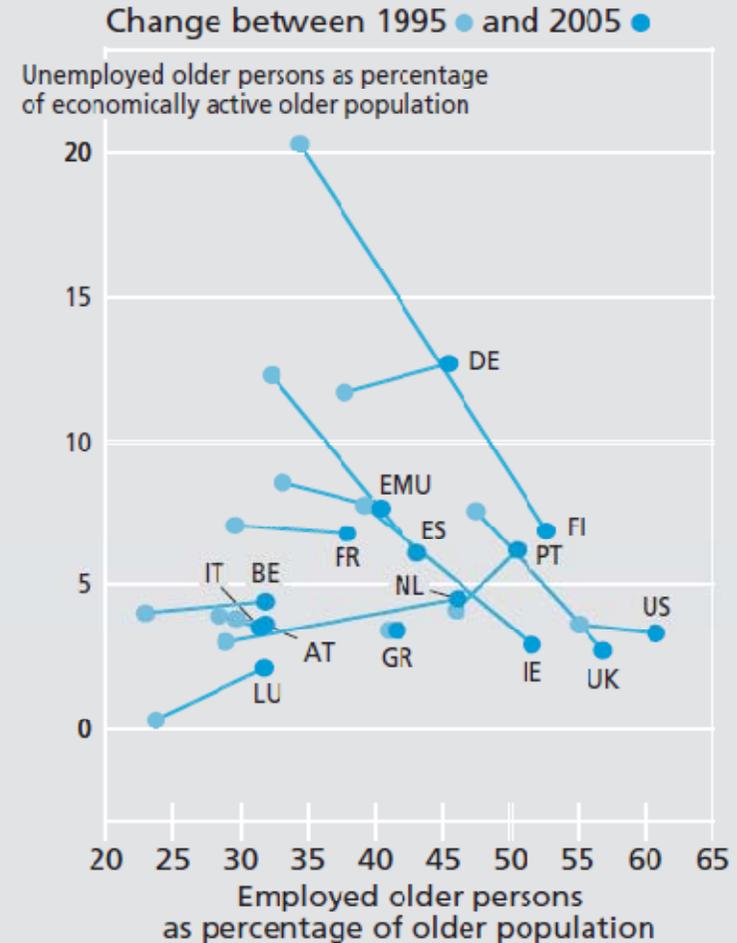
图2 Integration of women in the labour market



Source: Eurostat.

Deutsche Bundesbank

图3 Older persons' * participation in the labour force



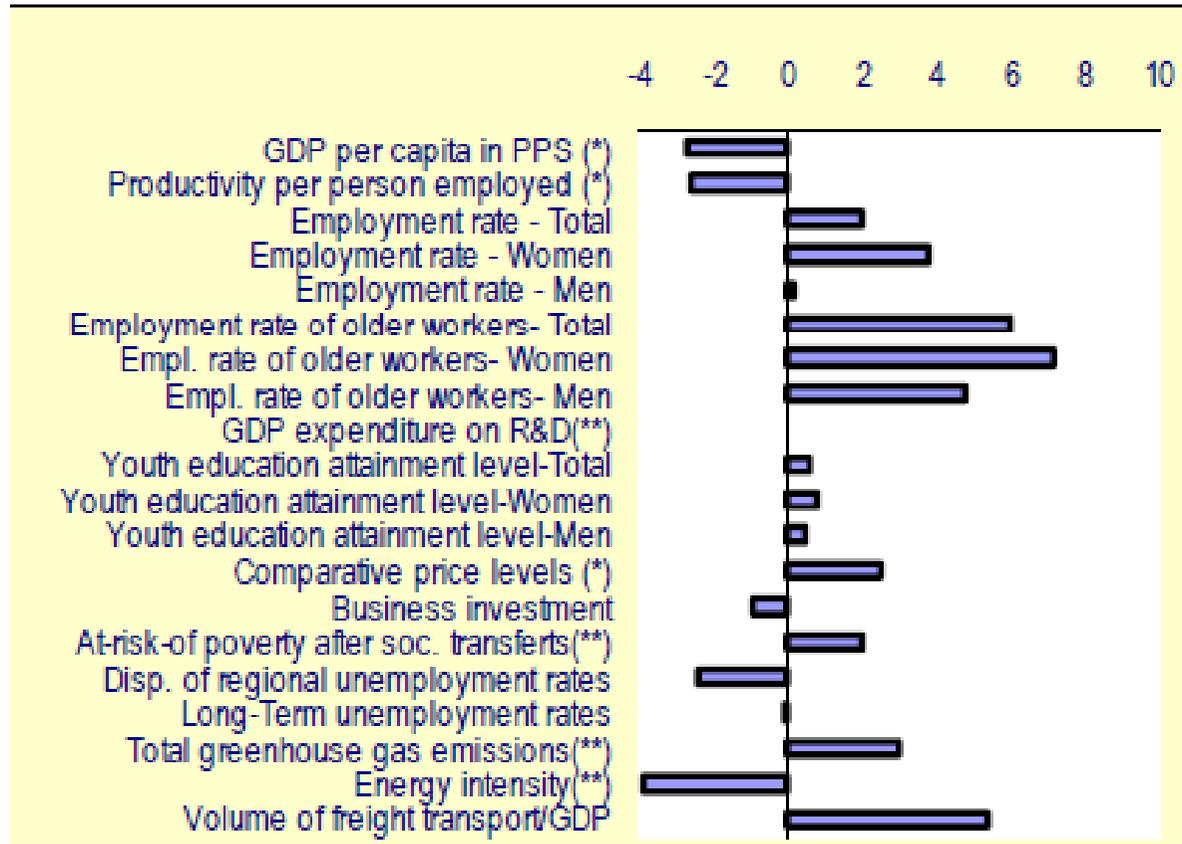
Sources: Eurostat and OECD. — * Aged between 55 and 64 years.

Deutsche Bundesbank

Source: Deutsche Bundesbank(2007), 'The labor market in Germany: general developments in an international context', *Monthly Report*, January. p.37& p.41.

4

Graph 2.8: Structural indicators earmarked for the Growth and Jobs Strategy, euro area
(change in percentage points from 2000 to 2005)



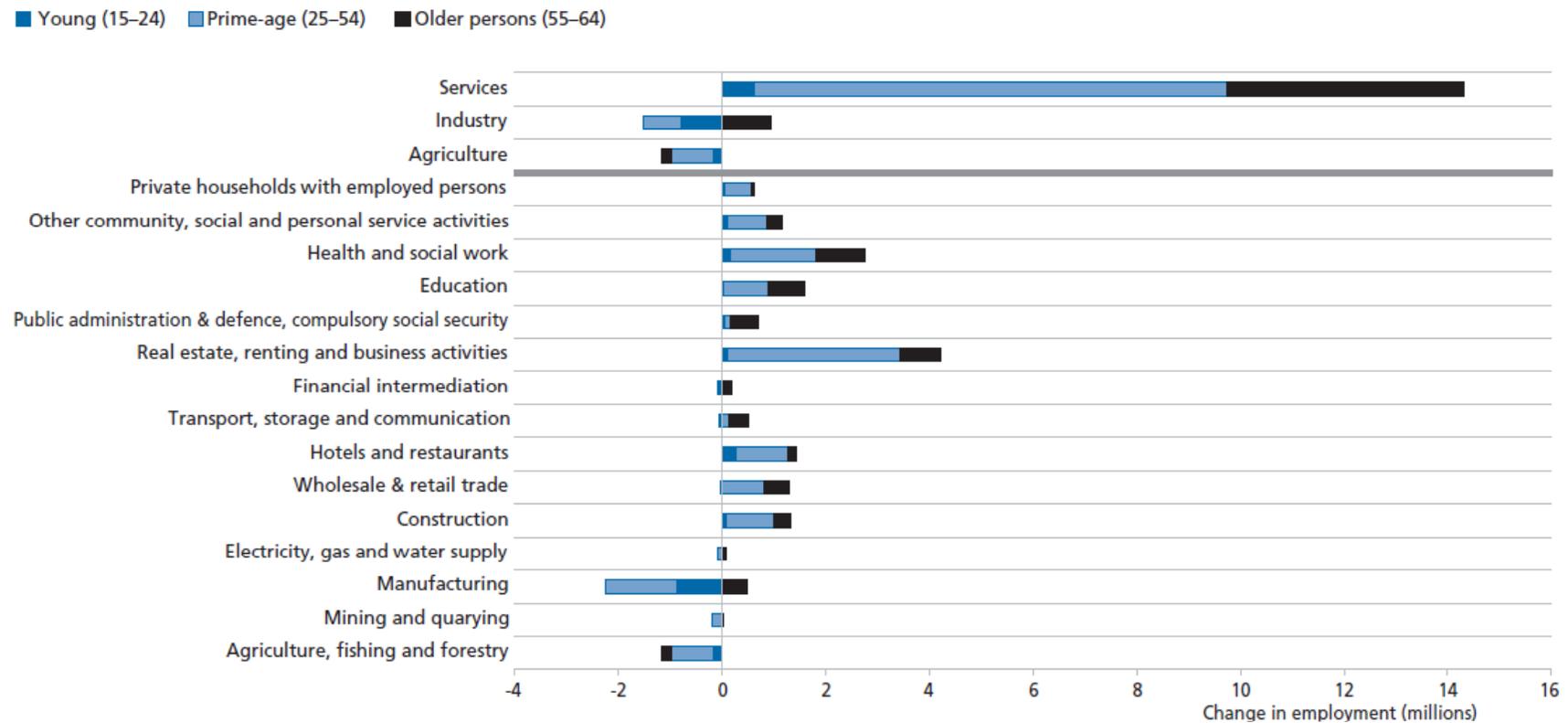
Note: data and methodology could be accessed on the Eurostat website (<http://europa.eu.int/comm/eurostat/structuralindicators>)

(*) change in relation to the EU25 average; (**) 2000-2004 change

Source: 2006 Commission assessment of National Reform Programmes, euro-area fiche.

Source: European Commission(2007), *Annual Report on the Euro Area-2007*. p.23.

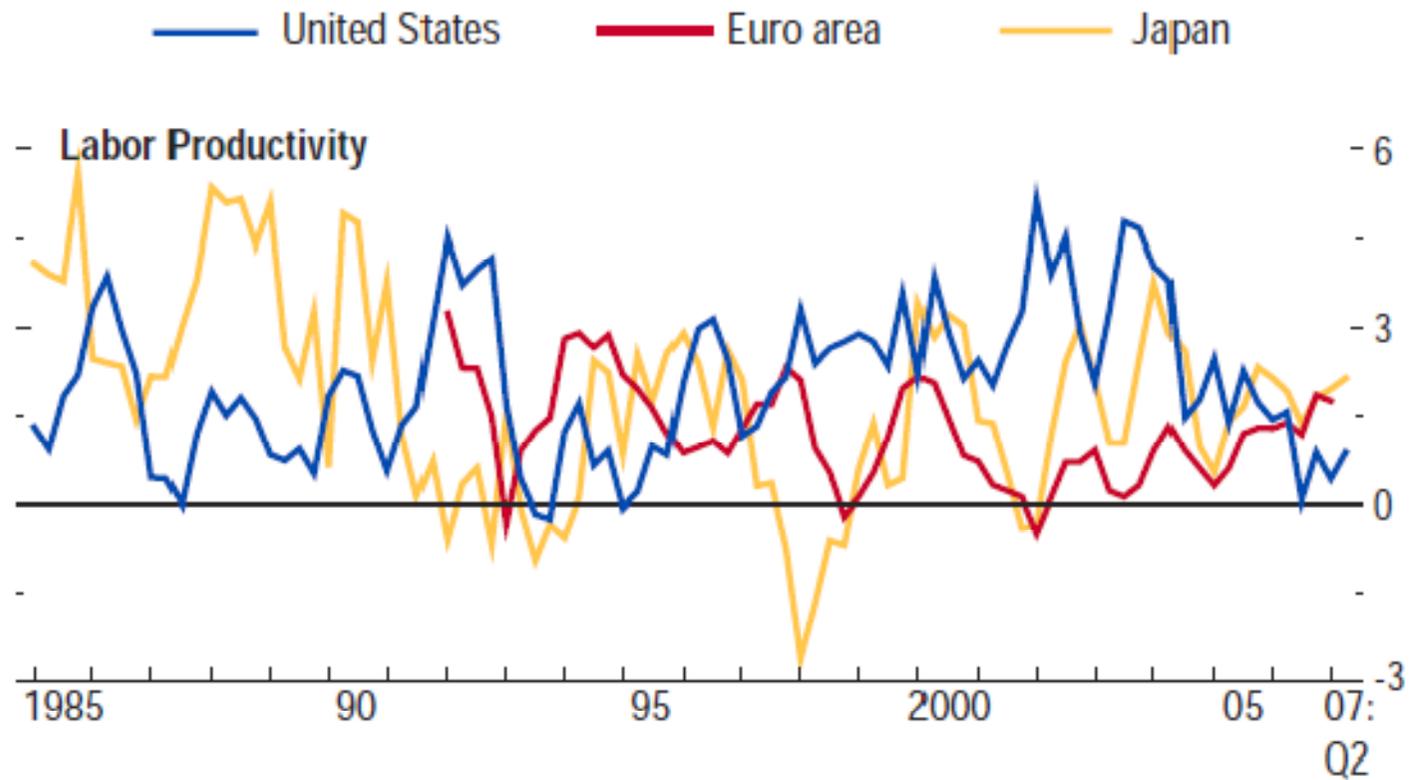
Chart 20: Change in sectoral employment in the EU-25 between 2000 and 2006 by age group



Source: Eurostat, EU LFS spring 2000 and second quarter 2006 results.

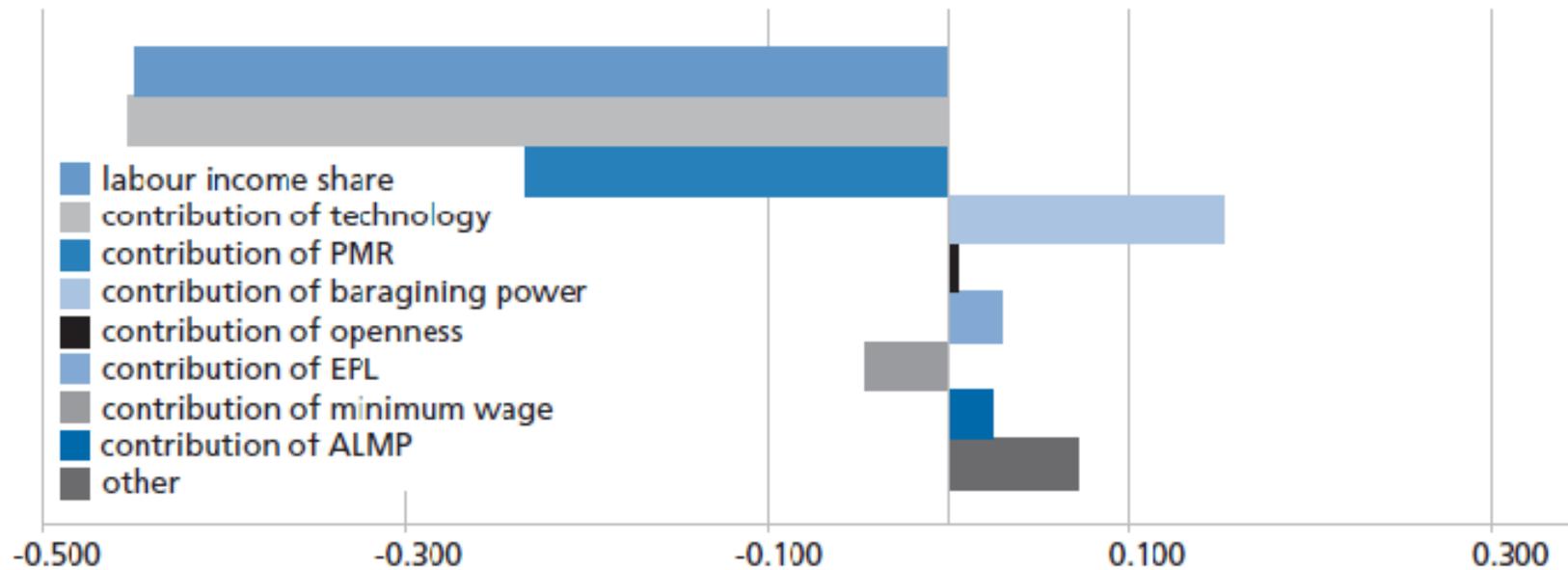
Source: European Commission(2007), *Employment in Europe 2007*, p.70.

日米EU三極における労働生産性の変化



Source: IMF(2007), *World Economic Outlook*, October, p.22.

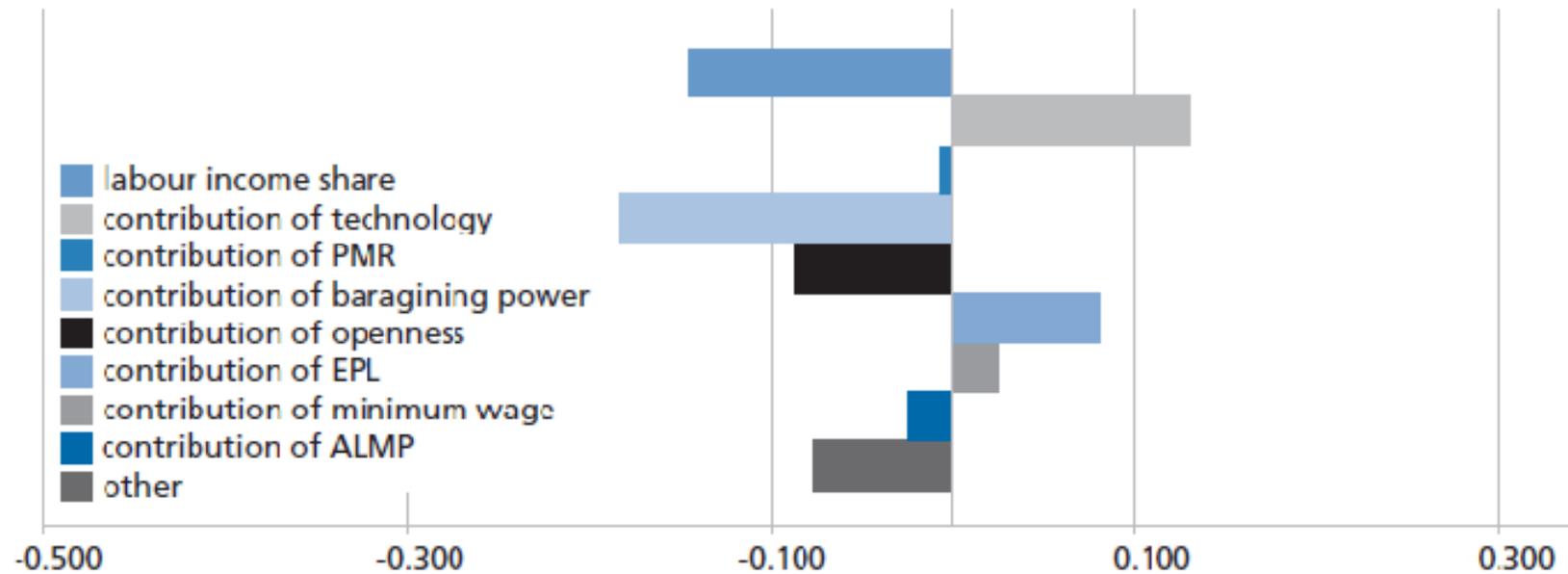
Chart 16: Change in labour income share in EU-11: low-skilled
(percentage points, annual averages)



Note: EU-11 includes Belgium, Denmark, Germany, Spain, France, Italy, the Netherlands, Austria, Finland, Sweden and the United Kingdom.

Source: European Commission(2007), *Employment in Europe 2007*, p.258.

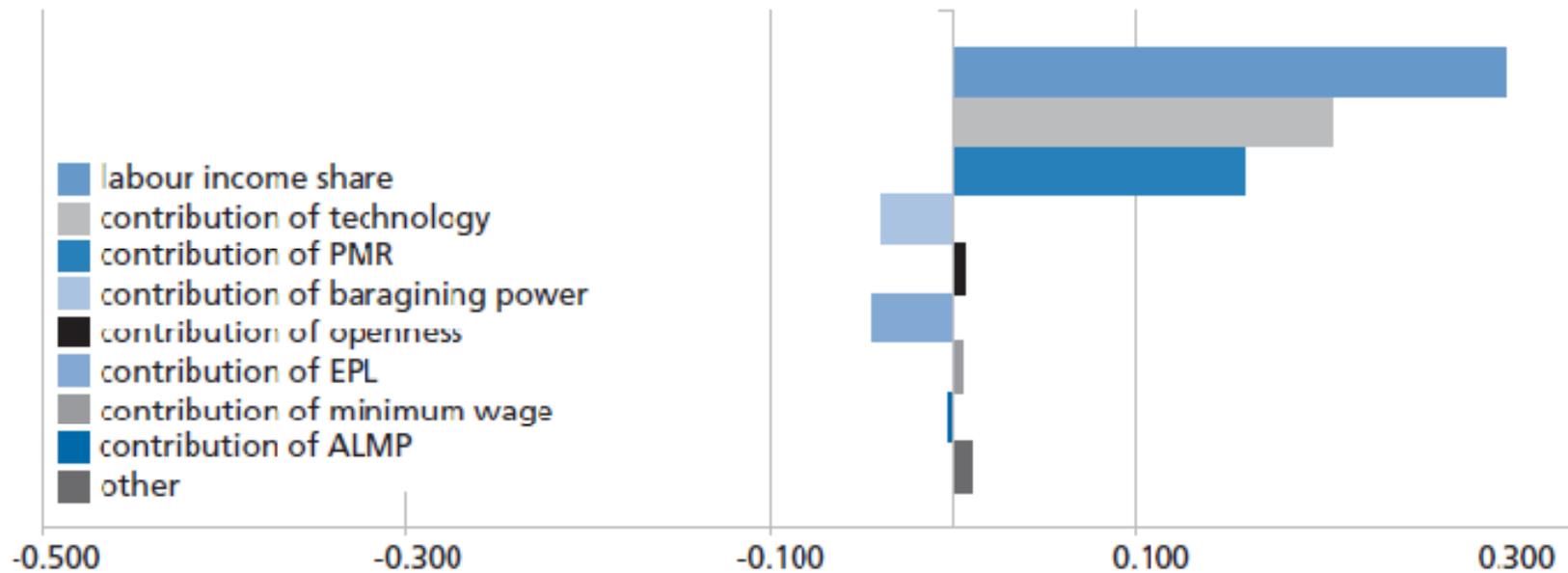
**Chart 17: Change in labour income share in EU-11: medium-skilled
(percentage points, annual averages)**



Note: EU-11 includes Belgium, Denmark, Germany, Spain, France, Italy, the Netherlands, Austria, Finland, Sweden and the United Kingdom.

Source: European Commission(2007), *Employment in Europe 2007*, p.259.

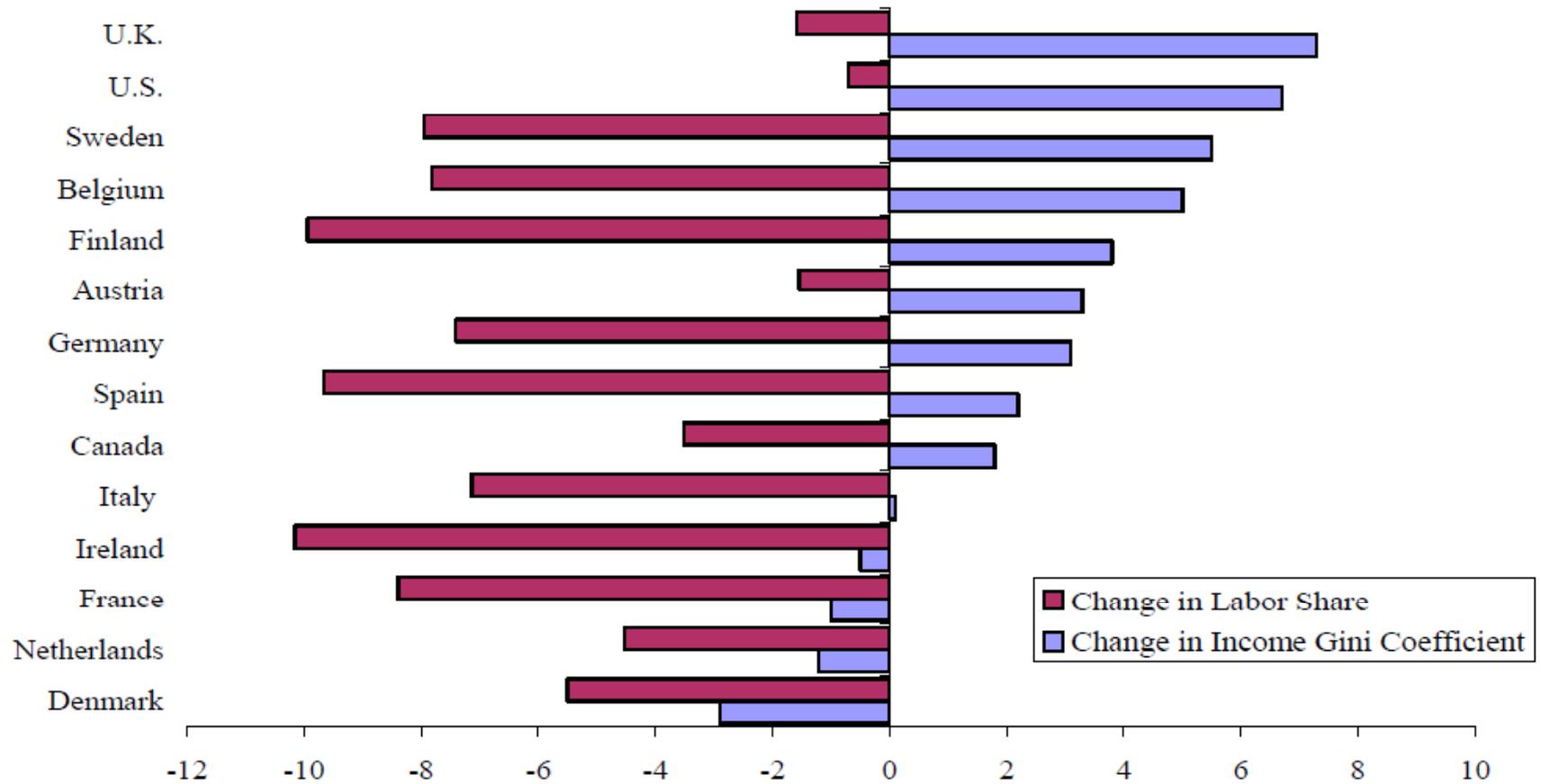
Chart 18: Change in labour income share in EU-11: high-skilled
(percentage points, annual averages)



Note: EU-11 includes Belgium, Denmark, Germany, Spain, France, Italy, the Netherlands, Austria, Finland, Sweden and the United Kingdom.

Source: European Commission(2007), *Employment in Europe 2007*, p.259.

**Change in Income Gini Coefficient and Labor Shares
(Late 1970s/Early 1980s - Late 1990s/Early 2000s)**



Source: Luxembourg Income Study and OECD, STAN. Labor share (5 year moving average) is wage compensation plus computed labor compensation for self-employed over national income.

Harjes, T.(2007), Globalization and Income Inequality: A European Perspective, *IMF Working Paper*, p.4.

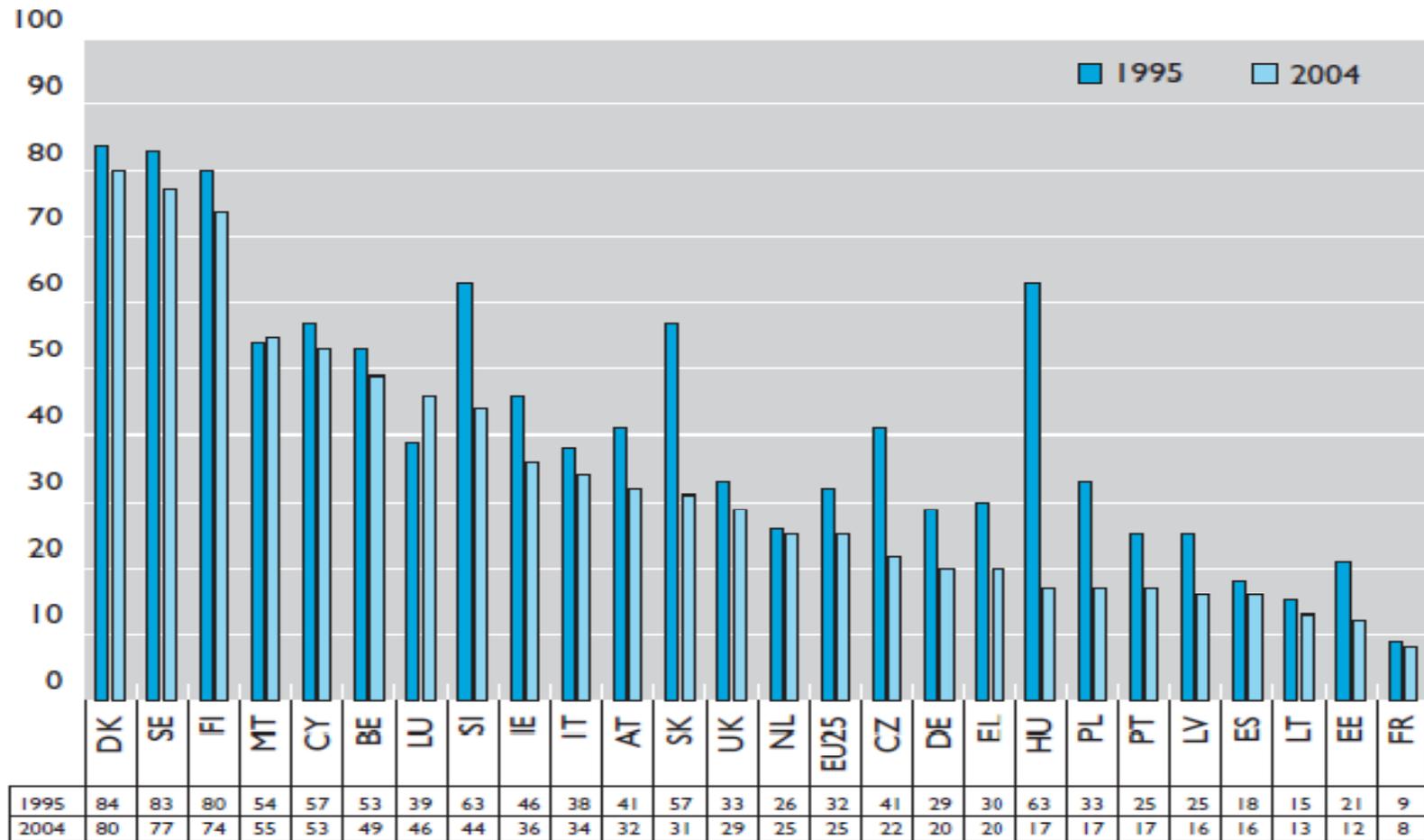
3. 労使関係の変化

- 労働組合の組織率の趨勢的低下
- 組織率の低下に伴う、賃金や労働条件決定に対する労働組合の交渉力の低下
- 集团的賃金交渉の侵食（産業別ないし産業横断的な賃金交渉から企業レベルへの賃金交渉へのシフト）

集团的賃金交渉：経営者団体と労働組合の交渉・対話を通じた対立の融和、労働者の権利擁護、賃金格差是正、マクロ経済的には、内需拡大のビルトインスタビライザーとして機能。

→労働分配率や実質賃金の低下、賃金格差の拡大へ

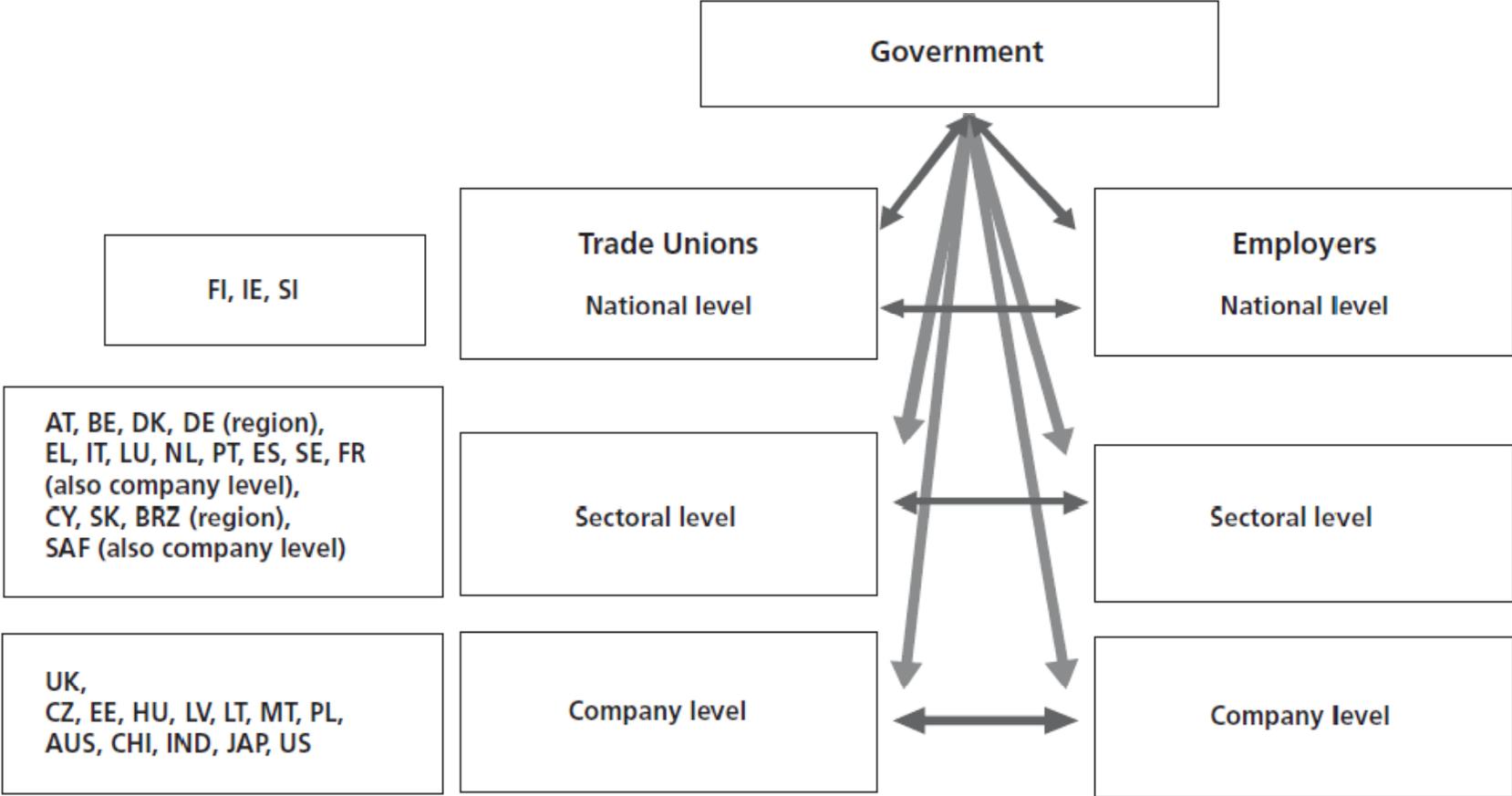
Figure 1.1: Trade union density, EU-25, 1995-2004



The total figure of gainfully employed members (excluding unemployed, students or retired) divided by the total wage earners population of the country; Figure 2004: CZ from 2003, CY from 2002; Figure 1995: FR from 1996; LV and LT from 1998; EU-25: weighted average based on employee population figures from Eurostat LFS data 2004 and ILO paid employment data 1995.

Source: European Commission(2006), *Industrial Relations in Europe 2006* p.25.

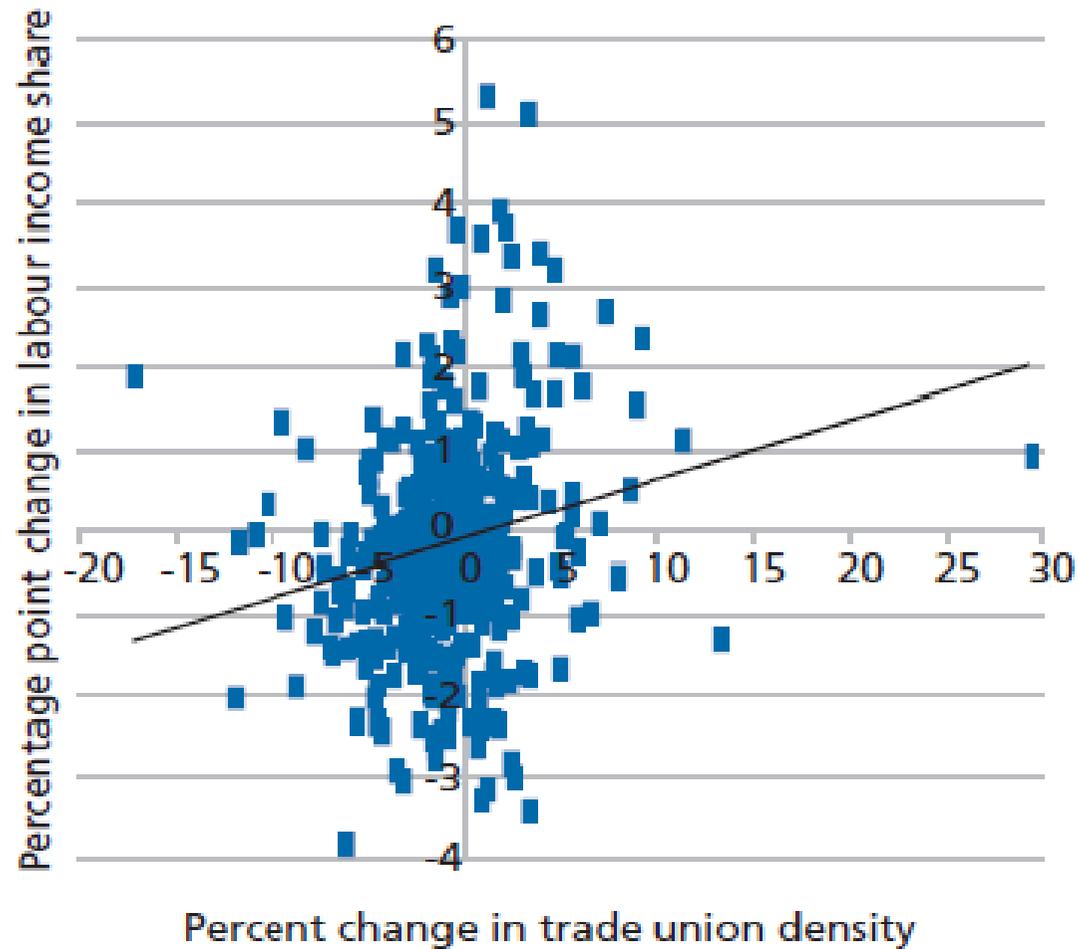
Figure 7 Collective bargaining levels



Sources: Kauppinen, 2006; EIRO, Country profiles, 2006; National experts' comments, 2006.

Source: European Foundation for the Improvement of Living and Working Condition (2008), *Impact of globalization on the industrial relations in the EU and other major economies*, p.23 .

Chart 9: Labour income share vs. trade union density



Source: European Commission(2007), *Employment in Europe 2007*, p.250.

4. ヨーロッパの社会モデルの行方

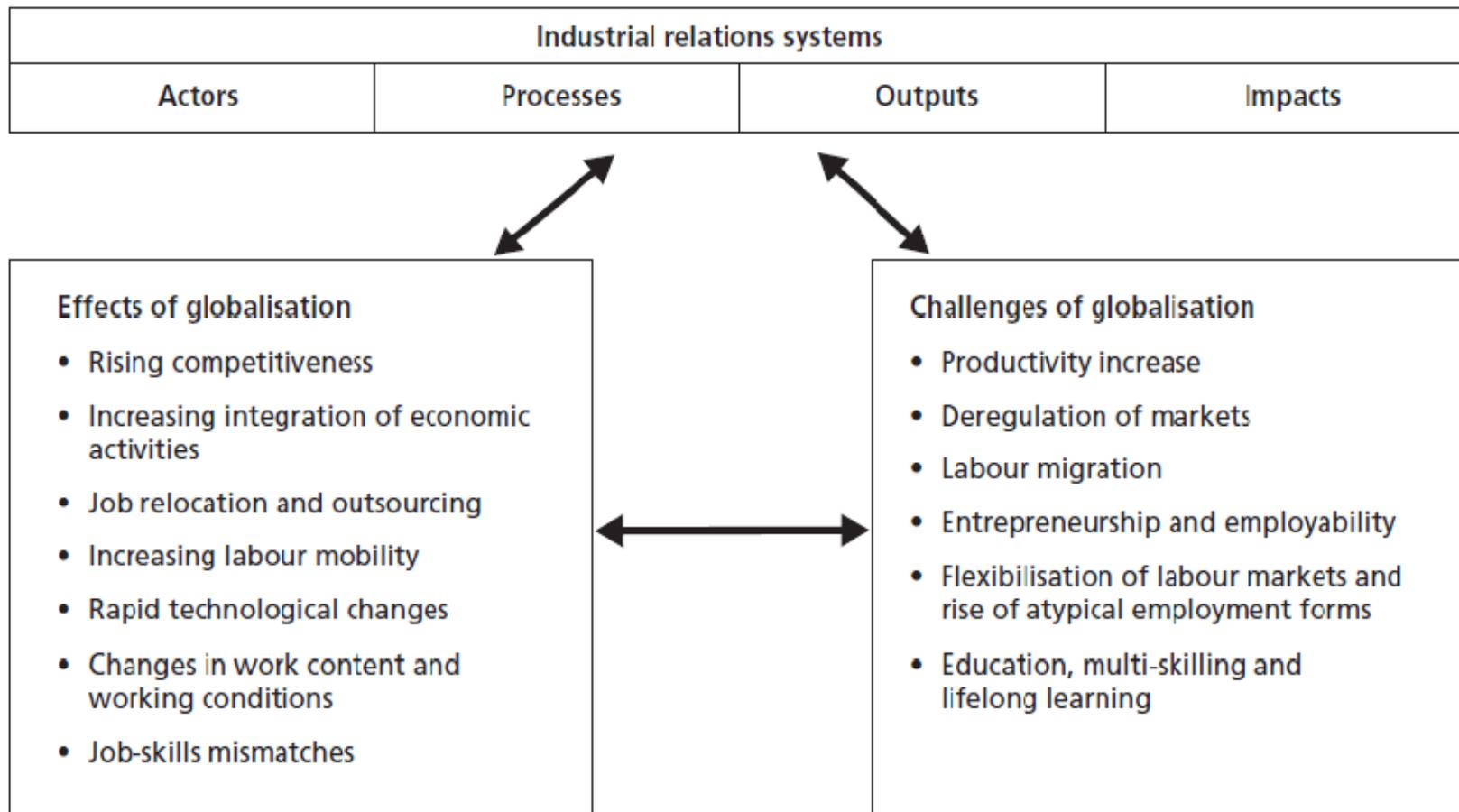
1. ヨーロッパの社会モデルが直面する課題
2. リスボン戦略とその評価

1. リスボン戦略の目標

社会的連帯と世界最高水準の競争力・経済効率の両立を目指し、完全雇用の達成、就労率やR&D投資の引き上げを目標に掲げる。アングロサクソン型資本主義と異なる独自の社会モデルを追求。

2005年に改定、More and Better Jobs!

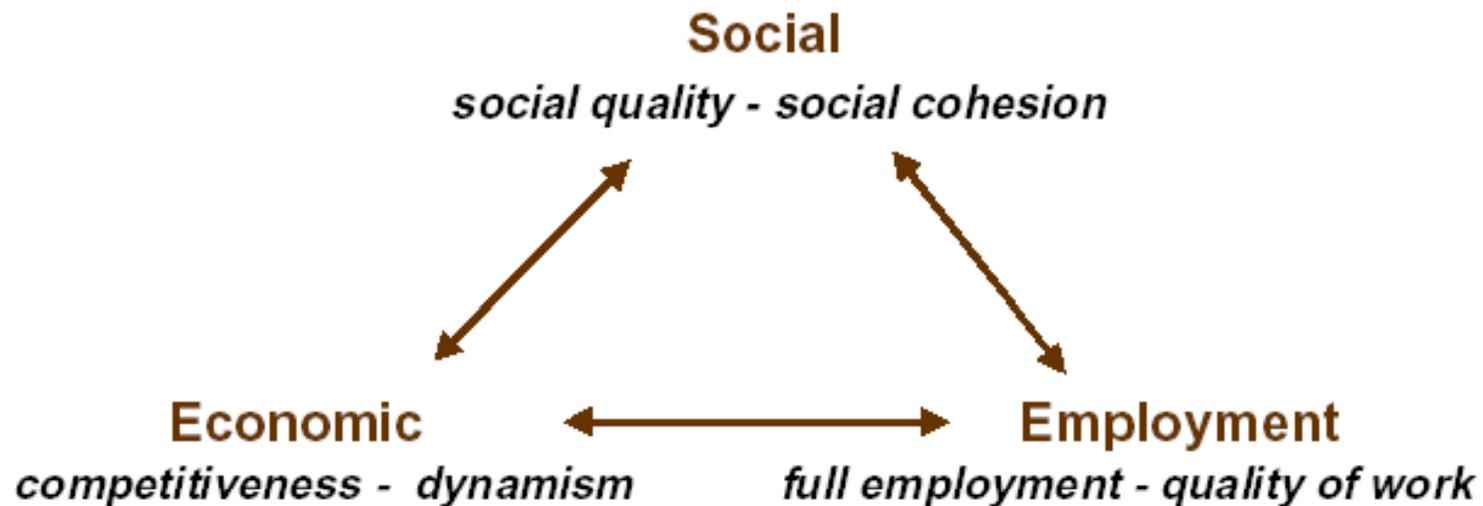
Figure 4 Effects and challenges of globalisation on industrial relations systems



Source: European Foundation for the Improvement of Living and Working Condition (2008), *Impact of globalization on the industrial relations in the EU and other major economies*, p.11.

Social and Labour Market Policies: Investing in Quality

Quality
*- the link between -
Competitiveness and Cohesion*



Graph 1

Employment 2020



Source: European Commission

2. リスボン戦略の成果

- 雇用創出には一定程度成功、就労率も上昇。しかし、2010年までの目標達成(4%の失業率、70%の就労率)は困難。
- 雇用の質の面では成果に疑問符。低賃金で低生産性の非正規雇用の著しい増大。いわゆるワーキングプアの増大。貧困リスクにさらされている層の3分の1。他方、若年および長期失業には大きな改善が見られない。R&D投資の比率も低いまま。
- 社会的連帯の目標にもかかわらず、所得格差拡大(20%の最富裕層と20%の最貧困層の格差は、2000年の4.5対1から4.8対1へ)。賃金格差だけでなく資産格差も影響(北欧(デンマークを除く)でも、著しい格差拡大)。

2. Flexicurityアプローチとその内容

1. ヨーロッパの社会モデルの理想としての Flexicurity model!?

Flexicurity (Flexibility + Security): 労働市場の
高い柔軟性 + 雇用の保証

2. デンマーク・モデルの構造

積極的な労働市場政策を通じた労働者のスキルアップ、就労可能性の引き上げ + 労働市場の規制緩和（雇用保護の緩和、職・地域間での高い労働力の移動性）。低い失業率、所得格差、高い労働者のスキル！

Table 1 Typology of forms of flexibilisation

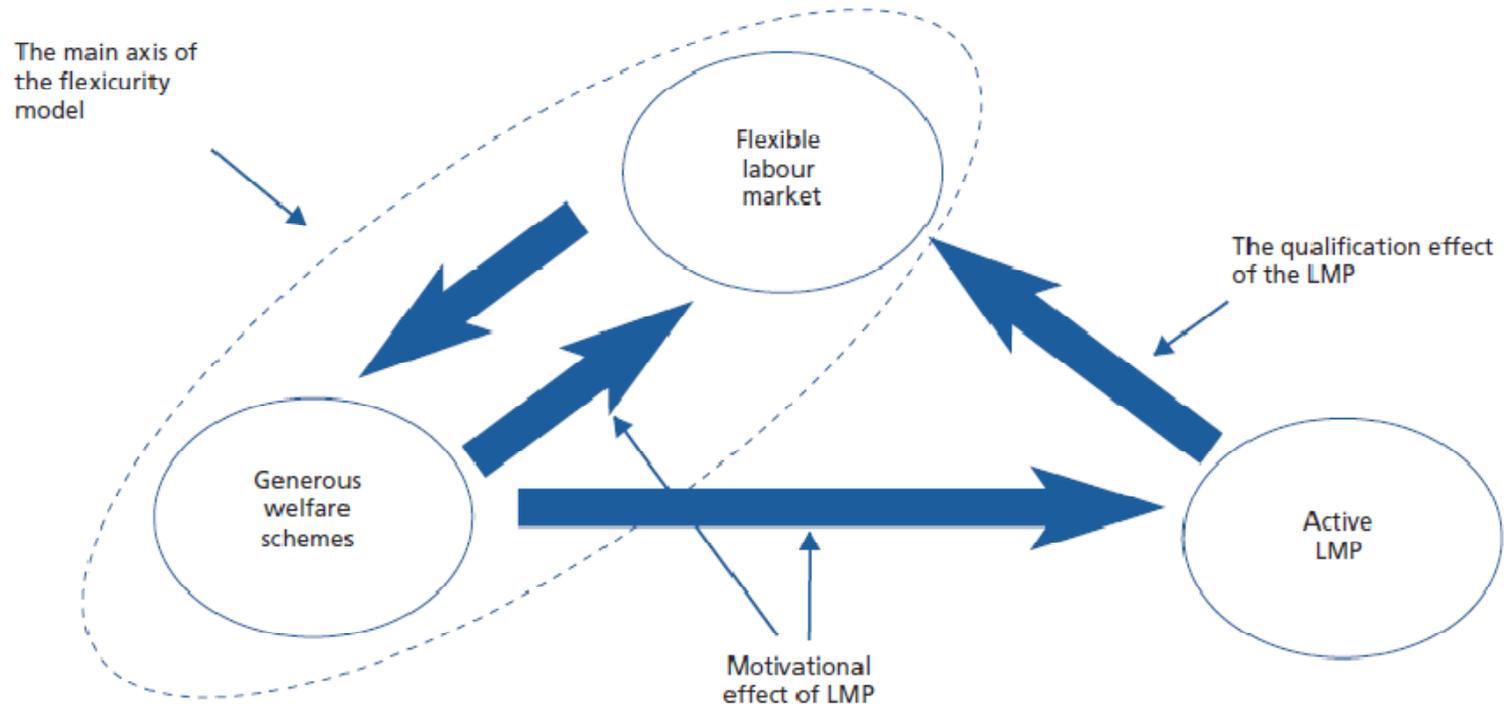
	Internal labour market	External labour market
Quantitative or numerical	<p>Flexibilisation of working hours Part-time work plus variations Overtime Second and third job</p> <p>Flexibilisation of working time Shift work (day) Variable working times (day) Weekend work (week) Flexible working time (year) Working time accounts (short, long-term) Career breaks, parental leave, other (life course) Flexible pensions (life course)</p>	<p>Flexibilisation of contracts Temporary agency work Casual job Temporary job On-call labour Hourly contract Insourcing and outsourcing Work as (sub)contractor Homework Labour pooling</p>
Qualitative or functional	<p>Flexibilisation of labour input ('employability') Occasionally employed Multi-skilling and multi-tasking Task and job rotation Task and job enrichment</p>	<p>Flexibilisation of labour force Knowledge worker Detachment of workers Freelance work Advising/consultancy work</p>

Source: Classification partly derived from Ester, Muffels and Schippers, 2001

Source: European Foundation for the Improvement of Living and Working Condition (2008), *Flexibility and security over the life course*, p.2.

Figure 1

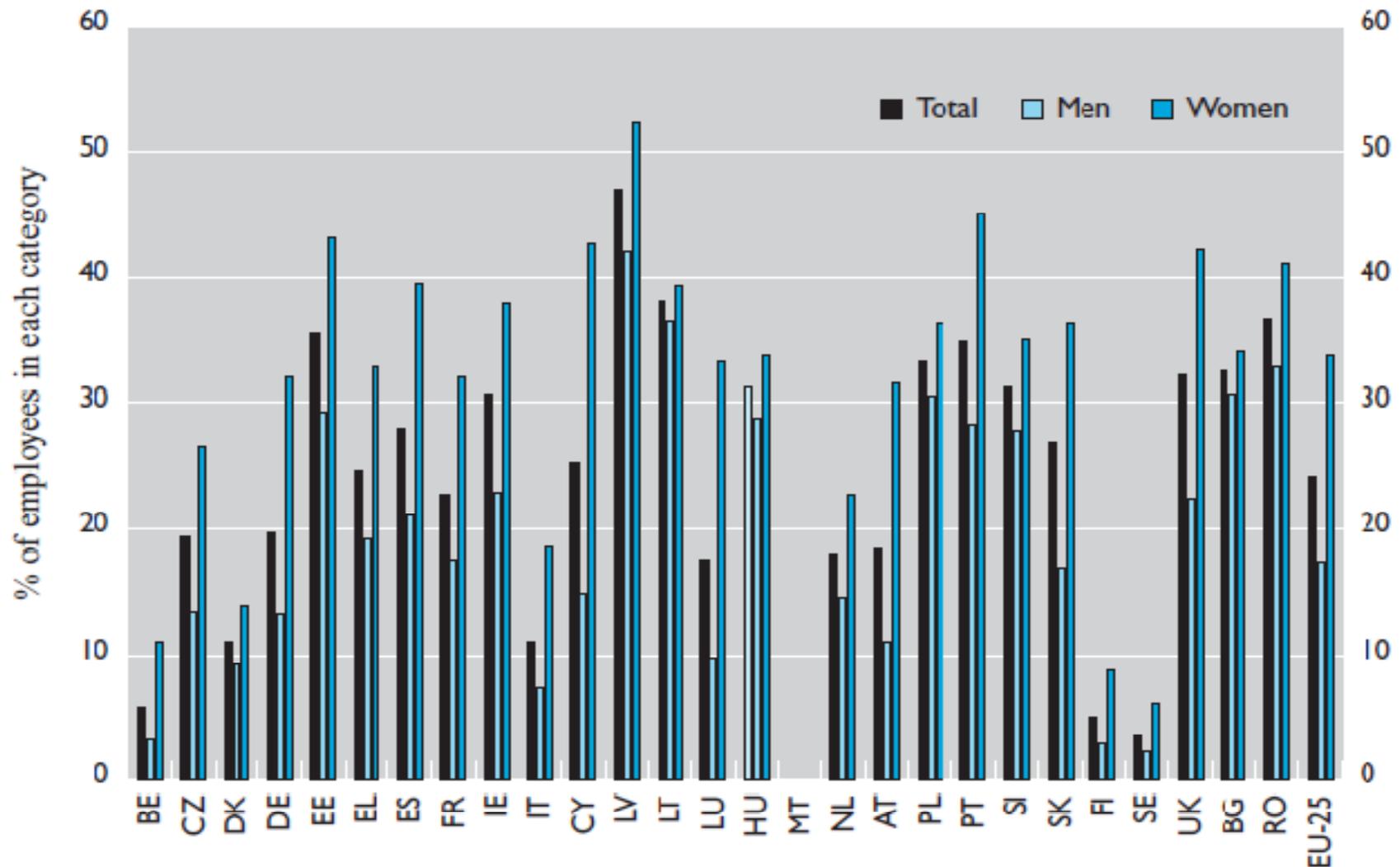
The Danish flexicurity model



Source: Madsen (2006).

Source: European Commission (2006), *Employment in Europe 2006*, p.79.

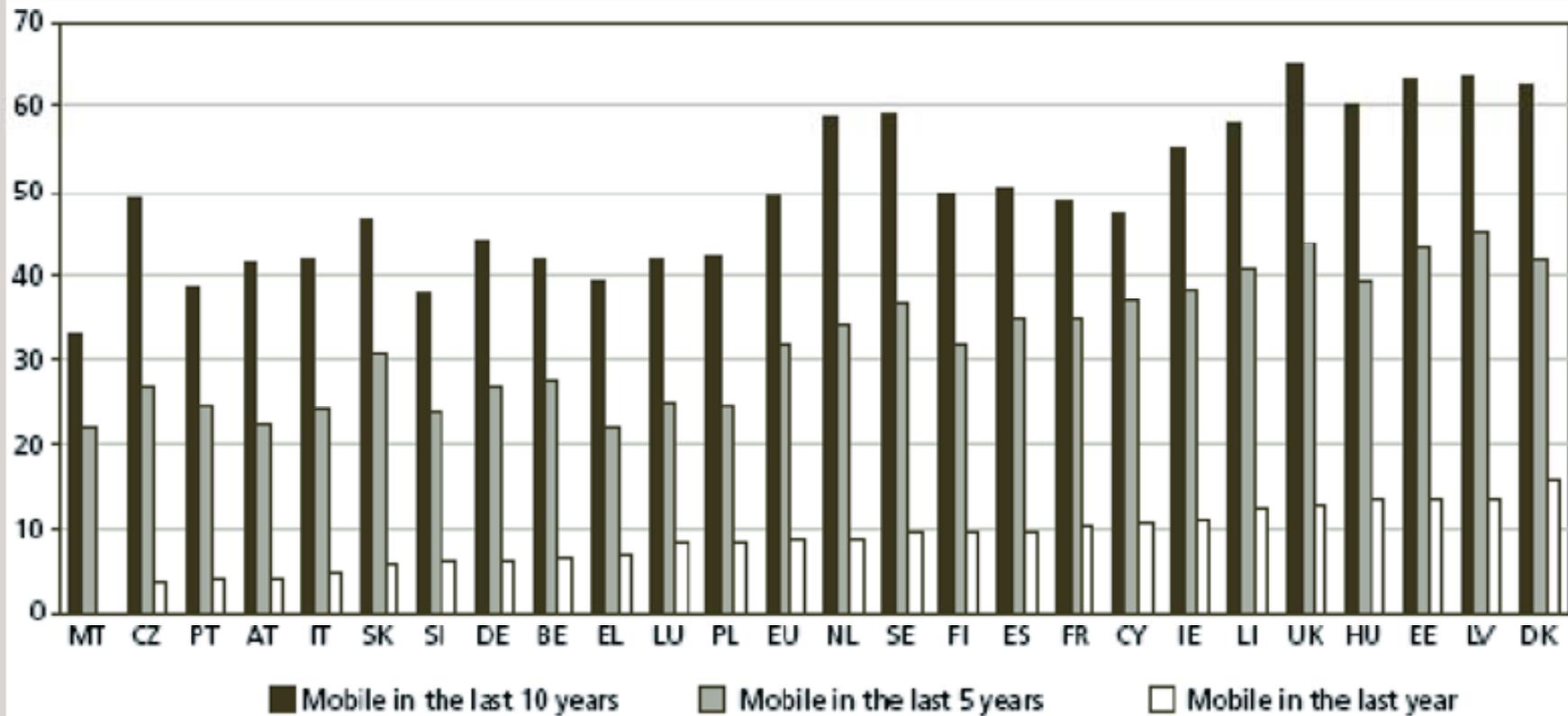
Figure 7.10: Employees on low wages in Member States, 2002



Source: Structure of Earnings Survey, 2002.

Source: European Commission(2006a), *Industrial Relations in Europe 2006* p.142.

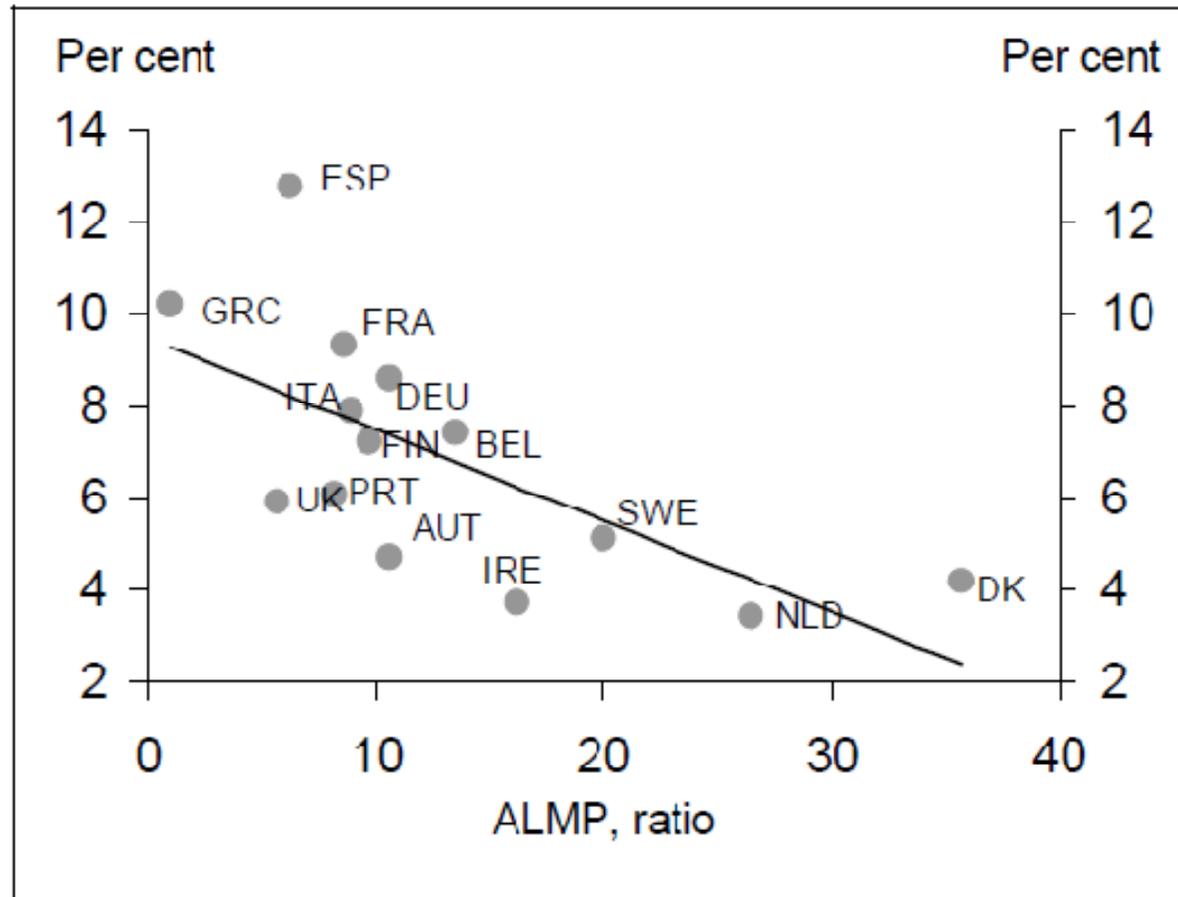
Chart 19: Job mobility, by country (%)



Source: *Mobility in Europe*, Dublin Foundation

出所 ETUC/CES, BUSINESSEUROPE, UEAPME and CEEP (2007), *Key Challenges facing European Labour Markets: A Joint Analysis of European Social Partners* p.37.

Figure 3a. Structural unemployment 2005 and ratio of Expenditures in ALMP per unemployed to GDP per person in labour force, 2004



Source: Eurostat and Danish Ministry of Finance.

http://ec.europa.eu/employment_social/employment_strategy/pdf/emco_workgroupflexicurity06_en.pdf

Table 13: Active spending, excluding PES (as % of GDP)

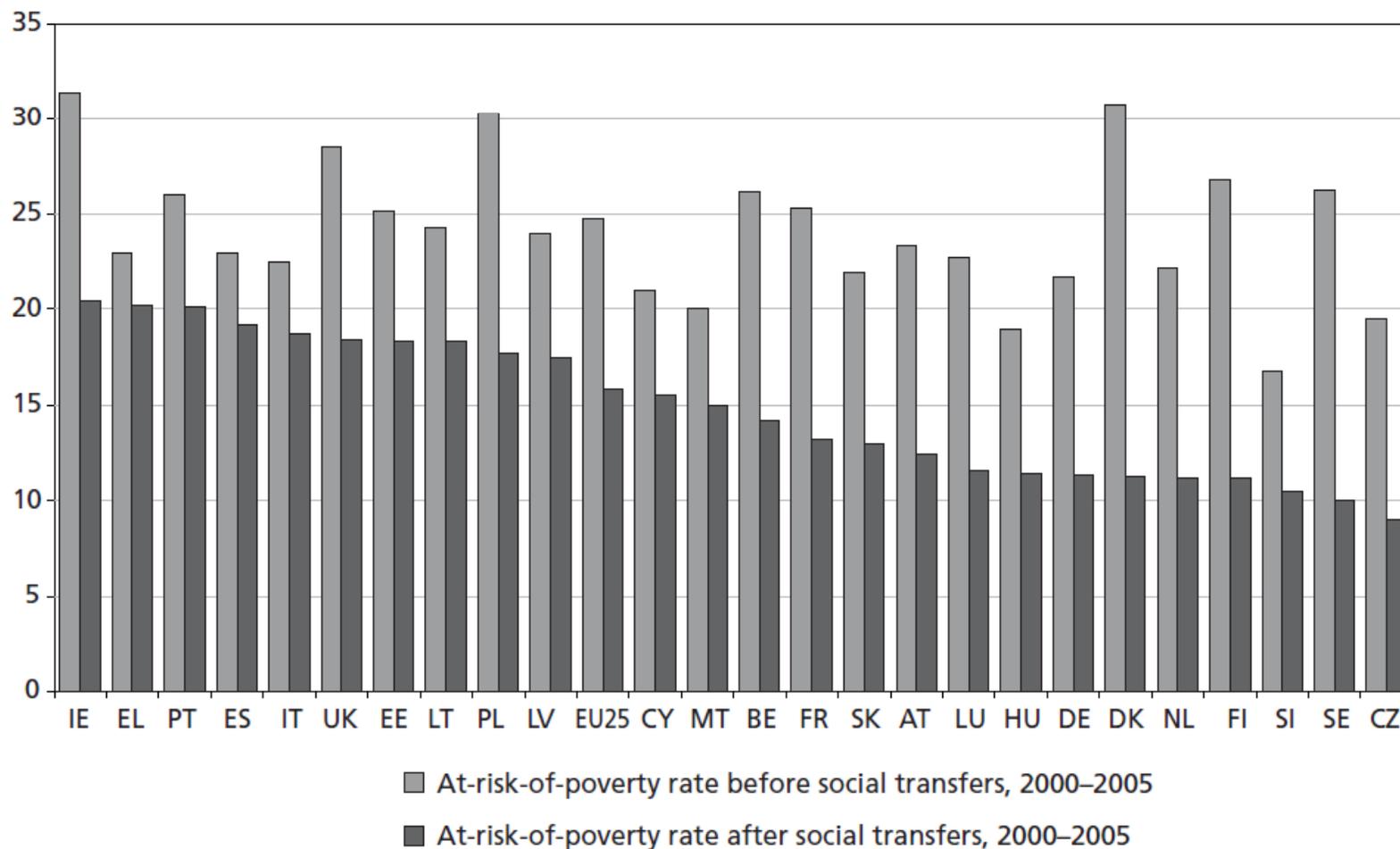
	1985	1990	1995	2000	2004
Austria	0.2	0.2	0.2	0.4	0.4
Belgium	1.1	1.0	1.1	1.0	0.9
Czech Republic	-	0.1	0.0	0.1	0.1
Germany	0.4	0.7	1.1	1.0	0.9
Denmark	-	1.0	1.8	1.7	1.5
Estonia	-	-	-	-	0.0
Spain	0.2	0.5	0.4	0.7	0.6
Finland	0.6	0.7	1.3	0.8	0.8
France	0.5	0.7	1.1	1.0	0.7
Greece	0.0	0.2	0.3	0.3	0.2
Hungary	-	0.5	0.3	0.3	0.2
Ireland	1.2	1.2	1.4	0.8	0.5
Italy	-	-	-	0.6	0.5
Lithuania	-	-	-	-	0.2
Latvia*	-	-	-	-	0.1
Luxembourg	0.2	0.2	0.1	0.1	0.2
Netherlands	1.0	1.0	0.9	0.4	1.1
Portugal	-	0.4	0.6	0.4	0.6
Sweden	1.9	1.5	2.9	1.5	1.0
Slovakia	-	-	-	-	0.1
United Kingdom	0.6	0.4	0.3	0.2	0.2
EU average**	0.7	0.6	0.9	0.7	0.5

Source: *Employment in Europe 2006*

*: 2003; **: Unweighted arithmetic average of countries for which data are available

出所 ETUC/CES, BUSINESSEUROPE, UEAPME and CEEP (2007), *Key Challenges facing European Labour Markets: A Joint Analysis of European Social Partners*, p.23.

Figure 7 Average at-risk-of-poverty rate before and after social transfers, by country, 2000–2005 (%)



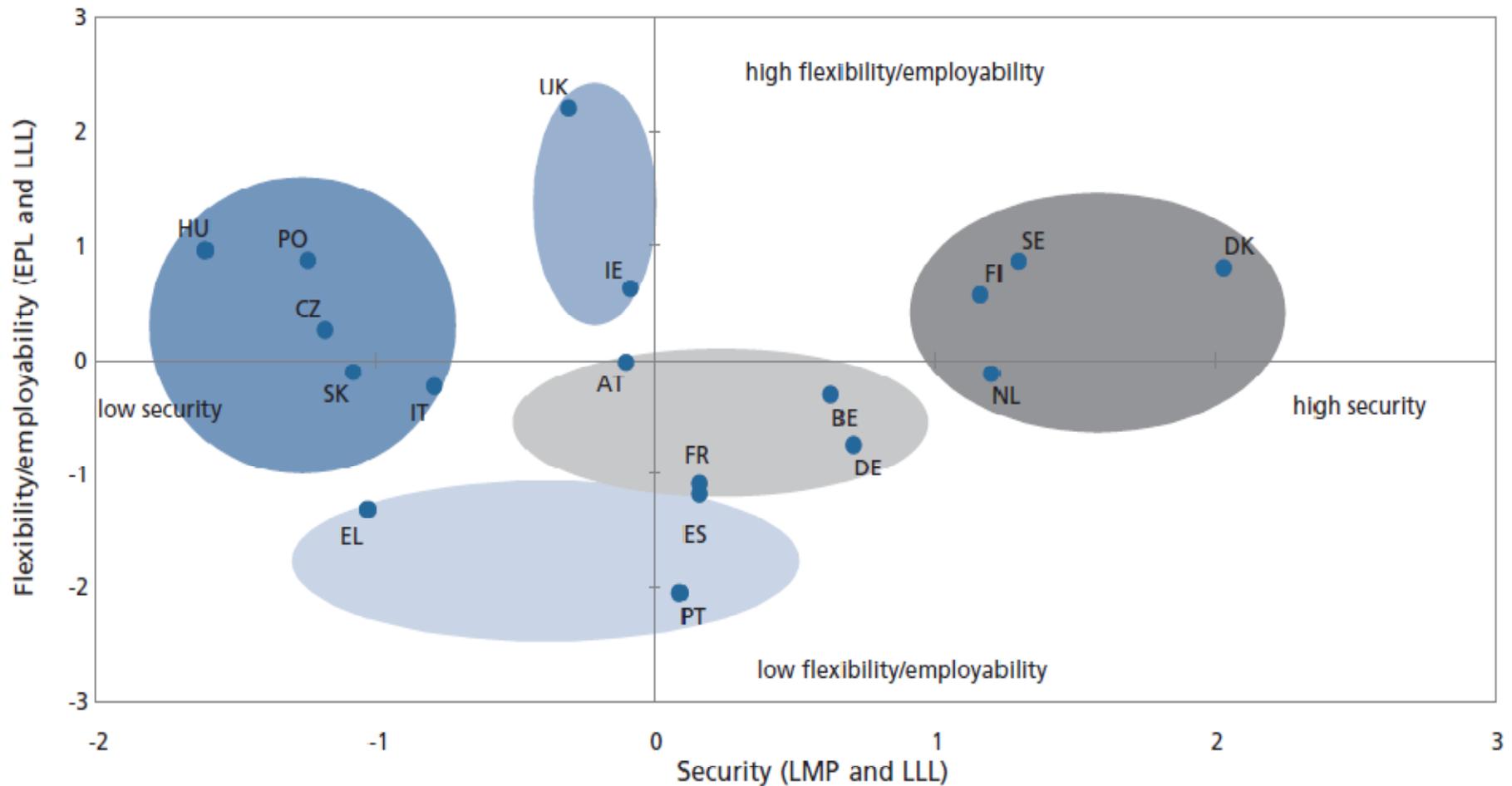
Source: European Foundation for the Improvement of Living and Working Condition (2007), *Approaches to Flexicurity: EU models*, p.19.

3. Flexicurityアプローチと現実の政策との乖離

- EU諸国の労働市場改革は、flexibilityに重点が置かれ、securityの充実は軽視。ALMPへの支出は、デンマークやオランダ、スウェーデンなど一部の国を除けば、元々多くないだけでなく、最近になって低下傾向
- 経営者団体は、ALMPの効果は認めるも、コスト負担に慎重。他方で、正規雇用分野で規制緩和を要求。
- 改定されたリスボン戦略では、よりリベラルな線に沿った、更なる自由化策や民営化、社会保障制度改革が打ち出されている。
- こうした条件下でのFlexicurityアプローチの進展は、更なる労働市場の規制緩和を通じて、賃金の抑制をもたらし、社会的連帯や労働の質を傷つける恐れ。
- EU諸国の多くの国の社会モデルは、ヨーロッパの社会モデルの理想とされるFlexicurity modelないしスカンジナビア・モデルよりも、アングロサクソン・モデルへ接近（企業統治や金融市場の構造でより顕著）

Figure 6

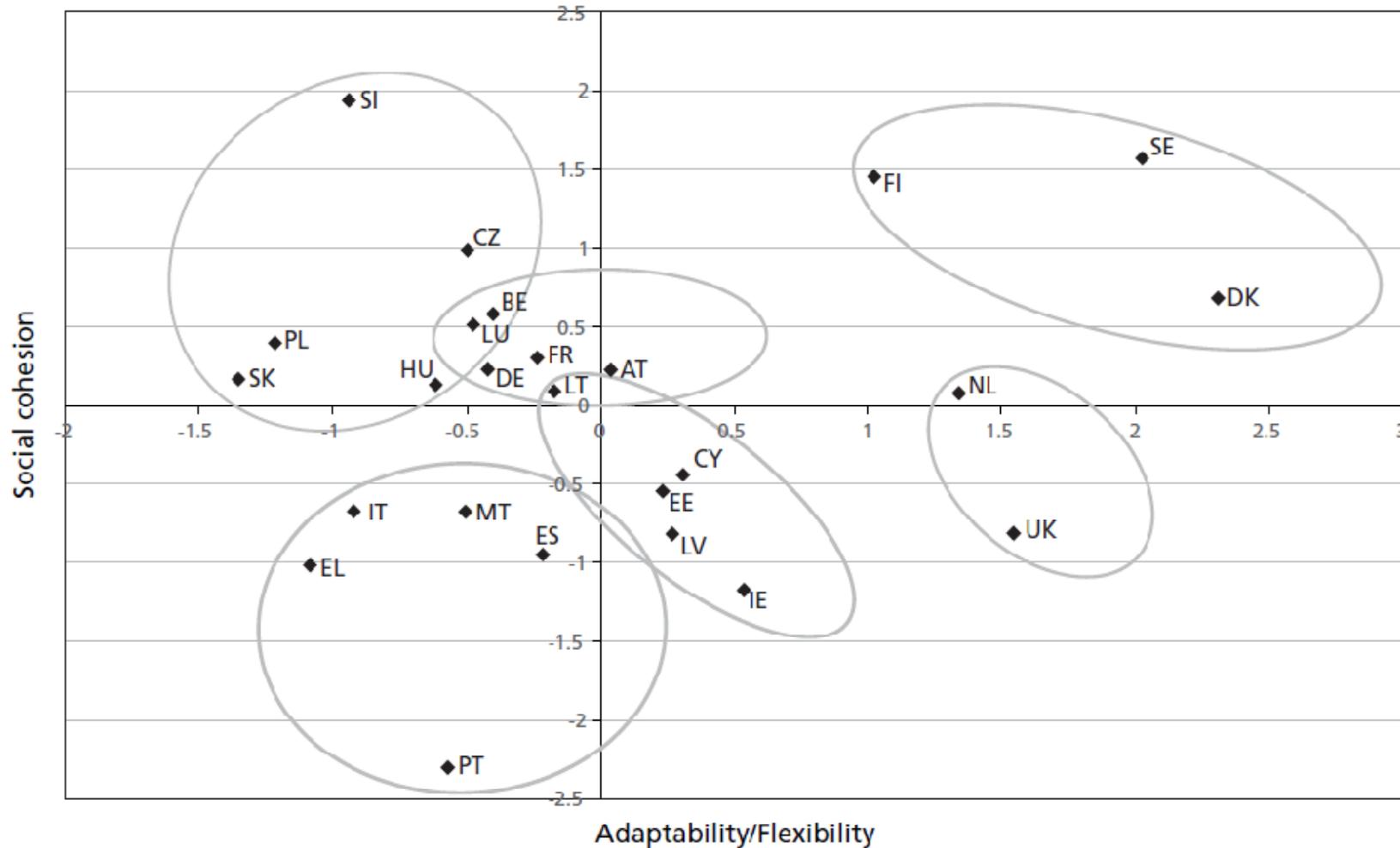
PCA: Country scores along security and flexibility/employability



Sources: DG EMPL calculations from Eurostat and OECD data.

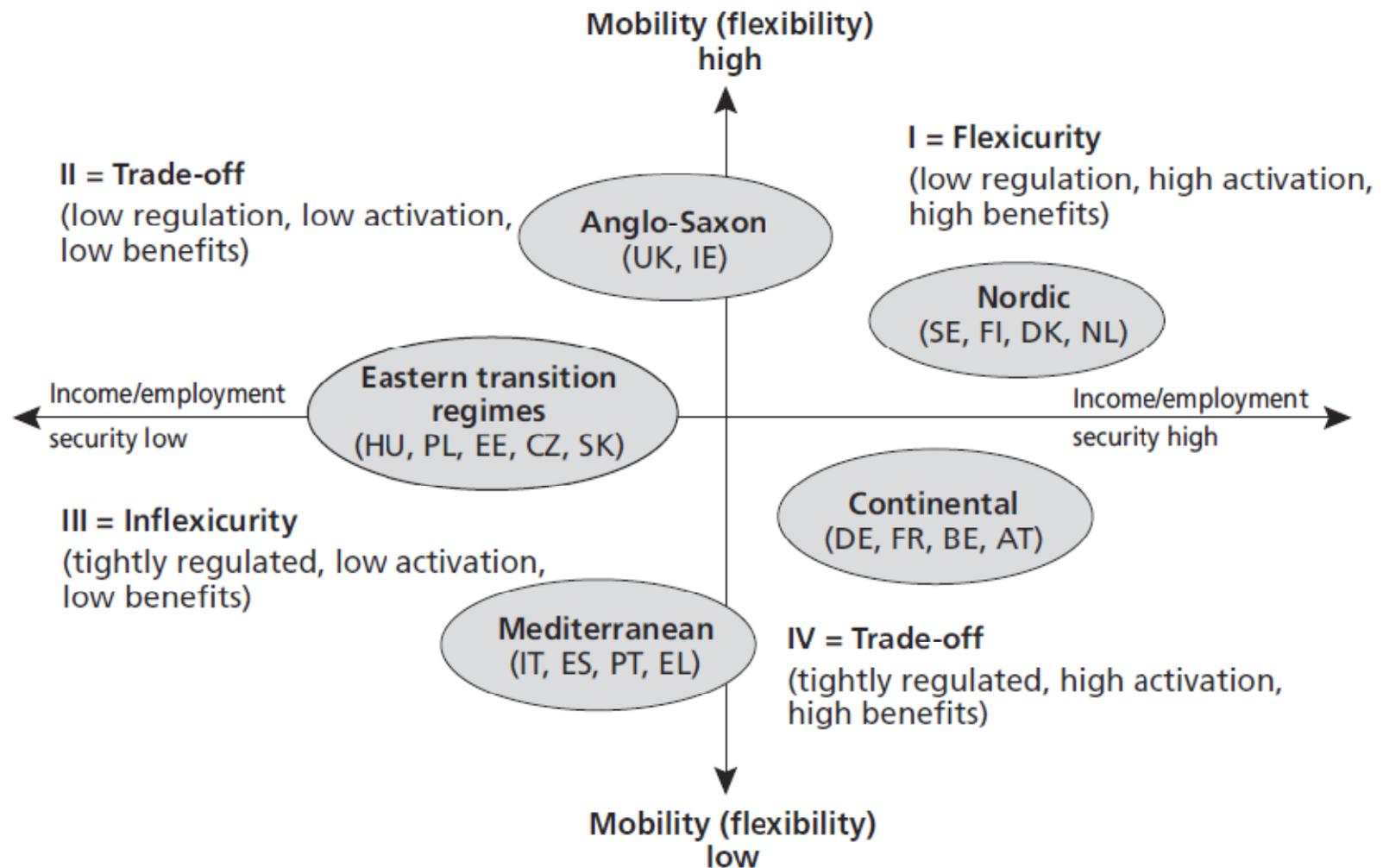
Source: European Commission(2006), *Employment in Europe 2006*, p.106.

Figure A2 Adaptability/flexibility versus social cohesion, by country



Source: European Foundation for the Improvement of Living and Working Condition (2007), *Approaches to Flexicurity: EU models*, p.49.

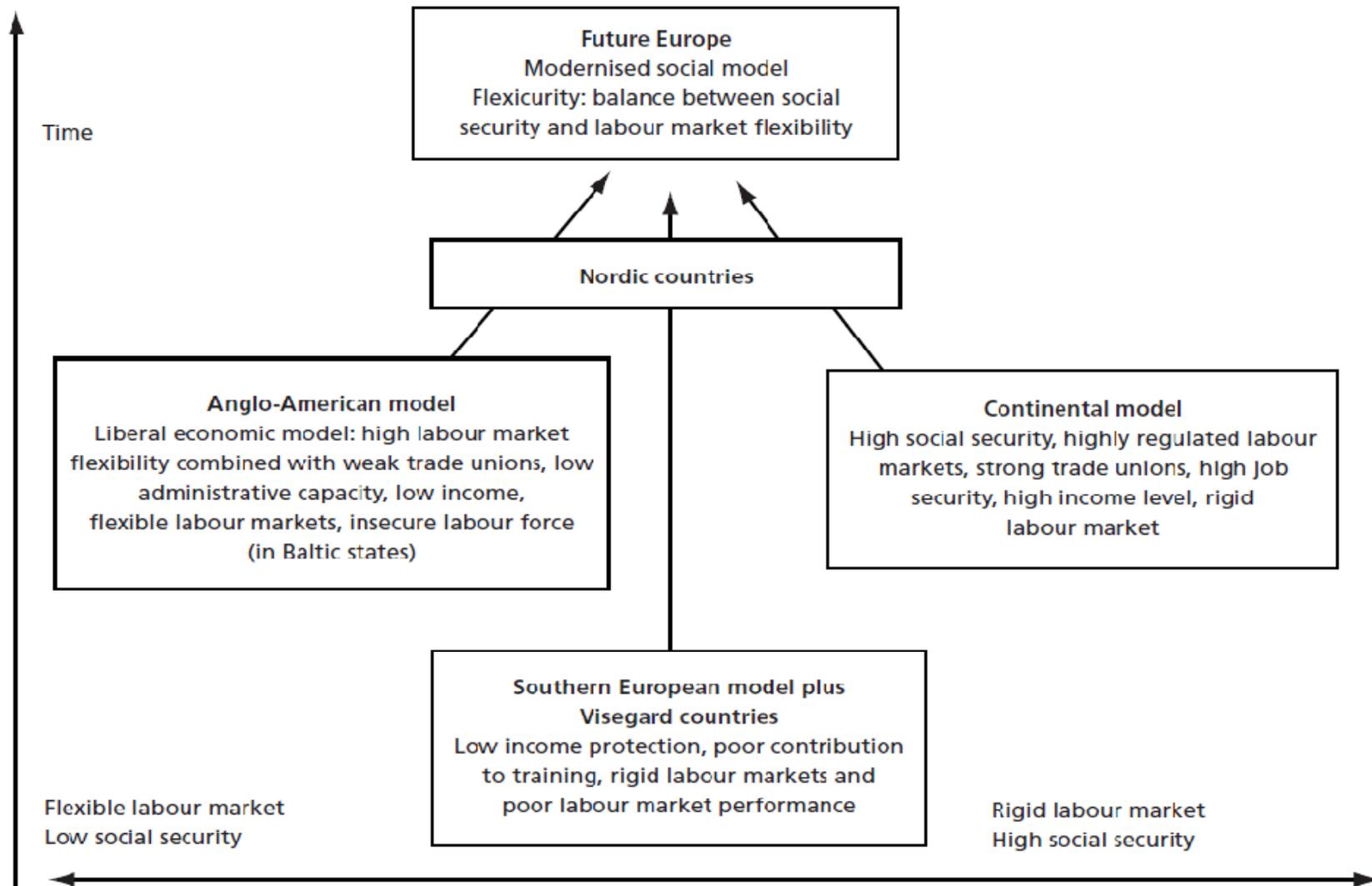
Figure 1 Welfare regimes and flexicurity



Source: Derived from Muffels and Luijkx, 2006

Source: European Foundation for the Improvement of Living and Working Condition (2008), *Flexibility and security over the life course*, p.11.

Figure A4 Convergence of 'old' and 'new' EU Member States in flexicurity framework



Source: European Foundation for the Improvement of Living and Working Condition (2007), *Approaches to Flexicurity: EU models*, p.51.

結論

- ヨーロッパ経済の復活は、資本と労働の関係が80年代以降前者に有利に展開し、90年代半ば以降、社会的制約・桎梏から「解き放たれた資本主義」の展開によってもたらされている。第2次大戦後に確立されたヨーロッパの経済・社会構造の変容へ。
- 賃金の抑制、不安定就労の増大の一方で、企業収益や配当、資産所得は著しく増加、それが活況を支えている。持続的な賃金上昇に代わり、内外の資産効果がヨーロッパの成長の牽引車に。
- サブプライム等に伴う信用収縮による資産価格の下落に伴い、成長の牽引車が消滅する恐れ。BRICsや他のエマージングマーケットに活路？