

## Overview

The shadow of the euro zone crisis and declining demand in the United States and European Union continues to have a sobering influence on economic growth and employment generation in the Asia-Pacific economies, particularly given their orientation towards exports and foreign direct investment. A new and significant factor is declining growth in the two Asian giants, China and India, which is affecting overall growth throughout the region.

Moderating growth sharpens existing labour market challenges, both in terms of employment quantity and quality. While relatively few workers in Asia are in open unemployment, many continue to work in vulnerable and precarious forms of work, where incomes are low or unstable and access to rights and benefits are very restricted. Social protection coverage remains extremely limited, although one positive development is that some Asian countries are now prioritizing the expansion of social protection using a range of strategies.

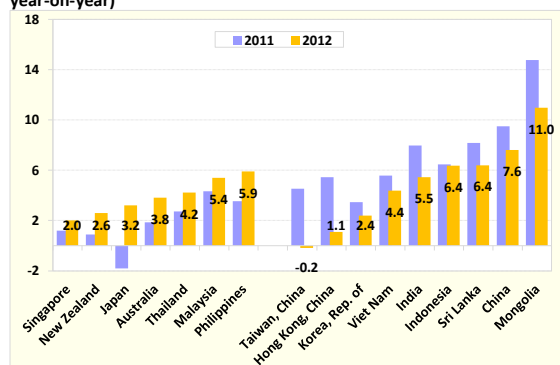
Of particular concern too is decent work for Asia's many young women and men, as the region continues to be home to the largest young population in the world. Catering to their aspirations for decent work remains a challenge, more so in the face of declining economic growth.

As well as the uncertain global situation there is increasing recognition of the underlying structural challenges facing many Asia-Pacific countries and the lack of well-functioning labour market institutions. Consequently, policy-makers are showing increasing interest in policies that promote sustainable and equitable growth by enhancing employment opportunities, improving skills development (especially for young people), and expanding universal social protection.<sup>1</sup>

## Economic growth moderates as global environment weakens...

The fragile global economic climate continued to take a toll on Asia and the Pacific. Economic activity decelerated in many economies in the region in 2012 as uncertainty caused by the euro area debt crisis persisted, export markets weakened and the global economic recovery continued to stall (see Figure 1).

Figure 1: Real gross domestic product, Q2 2011 and Q2 2012 (% change, year-on-year)



Source: CEIC Global Database; National statistical offices.

China's economy – which has been resilient in the face of the global recession – showed its vulnerability. GDP growth moderated from 9.5 per cent to 7.6 per cent, driven by falling export demand and the unwinding of initial policy response measures to the global economic crisis.

Likewise, India also saw a slowdown, with output growth decreasing from 8.0 per cent to 5.5 per cent, weighed down by flat industrial growth. In Sri Lanka growth, while still strong, decelerated considerably from 8.2 per cent to 6.4 per cent as a result of a decline in services sector activity.

By contrast, economic activity in South-East Asia showed overall resilience, driven partly by Indonesia where robust domestic demand supported GDP growth of 6.4 per cent. Output growth was notable and increased compared to the previous year in the Philippines (5.9 per cent) and Malaysia (5.4 per cent). In Thailand, a recovery in manufacturing after the 2011 flooding disaster helped boost economic growth to 4.2 per cent. However, in Viet Nam growth dipped to 4.4 per cent, partially due to tightening policy measures aimed at restraining high price inflation.

In the industrialized economies, trends were mixed. Weak external demand led to economic deceleration in Taiwan (China), Hong Kong (China) and the Republic of Korea. However, in Singapore, New Zealand and Australia, GDP growth rates improved on an annualized basis, although from a low base. In Japan, private consumption and post-tsunami reconstruction efforts contributed to economic expansion of 3.2 per cent.

In the Pacific Islands growth remained strong in the first half of 2012, albeit slower than in 2011.<sup>2</sup> GDP growth in Papua New Guinea is projected at 7.5 per cent in 2012, supported by the construction of a massive liquefied natural gas facility. In the Solomon Islands growth in 2012 is forecast at 6.0 per cent, benefiting from robust activity in forestry and mining. Conversely, in Samoa economic activity has slowed because of falling agriculture and fishery exports and declining tourism revenues.

If feeble demand in global markets continues policy-makers in Asia may turn to additional fiscal and monetary measures to stimulate growth.<sup>3</sup> However, in some economies (such as in India) high inflation and large trade deficits limit the options for easing monetary policy.<sup>4</sup> Moreover, policy-makers must also monitor food and commodity prices, which have trended upward, since high food price inflation has a disproportionate impact on poor workers and households. In particular, notable increases in the price of wheat and rice have been observed in recent months in Bangladesh, Cambodia and India.<sup>5</sup>

Looking ahead, the global economy is likely to remain sluggish in 2013 although prospects for the Asia-Pacific region would improve if the euro crisis is resolved and global demand recovers. Prolonged economic deceleration could put pressure on the region's labour markets, damaging prospects for improving working conditions and creating decent jobs.

### ...with job growth mostly decelerating...

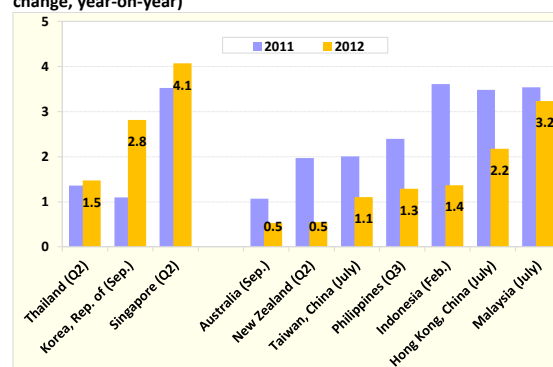
In line with the region's weakening economic environment, overall employment growth moderated in 2012 compared to 2011 (see Figure 2). In Indonesia employment trends slowed despite strong economic activity; employment growth fell from 3.6 per cent to 1.4 per cent in February 2012. The Philippines saw a similar deceleration; in spite of increasing GDP growth, employment expanded by 1.3 per cent in the third quarter, compared to 2.4 per cent in the same period of 2011.

In comparison, in Malaysia and Singapore the net increases in employment were robust, rising by 3.2 per cent and 4.1 per cent respectively. Employment growth in Thailand also ticked upwards slightly to 1.5

per cent, partly reflecting the country's rebound from the 2011 flooding crisis.

Progress in the industrialized Asian economies was mixed. Employment growth slowed considerably to 0.5 per cent in both Australia and New Zealand and to 1.1 per cent in Taiwan (China). In Hong Kong (China) employment growth was still significant at 2.2 per cent, but was lower than the previous year. By contrast, the Republic of Korea saw accelerated employment growth of 2.8 per cent in September.

Figure 2: Employment, latest period 2012 and same period 2011 (% change, year-on-year)



Note: Ages 15+.

Source: National statistical offices; ILO: Laborsta.

Even with these varied employment trends, unemployment rates remained mostly low (below 5.0 per cent) in a majority of the Asian economies for which data are available.<sup>6</sup> In the Philippines and Indonesia, two countries facing significant labour force growth pressure, unemployment remained high but declined respectively to 7.0 per cent in the third quarter and 6.3 per cent in February. However, progress in reducing unemployment in developing Asia should be weighed against the high prevalence of vulnerable employment and the rising number of casual jobs (see below).

Current projections indicate there will be little progress in reducing overall unemployment in developing Asia in 2013. Unemployment is forecast to remain at 4.5 per cent in East Asia, 4.6 per cent in South-East Asia and the Pacific and 3.8 per cent in South Asia.<sup>7</sup>

### Box 1: Better policies needed to boost jobs for youth

The youth employment challenge is often characterized as that of a potential lost generation of young people. One group that symbolizes these concerns are youth who are not in employment, education or training (NEET). A large youth NEET population (which also includes young people who are discouraged and no longer seeking work) are effectively detached from the labour market and at significant risk of long-term labour market and social exclusion.

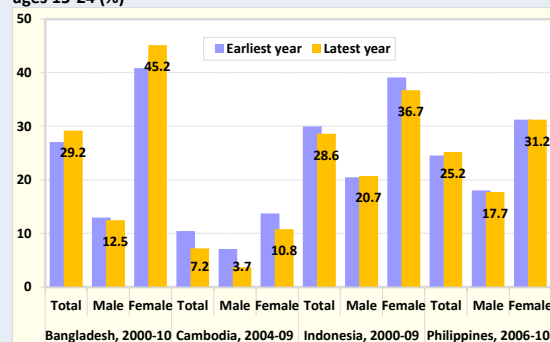
In parts of developing Asia the share of youth NEET remains high (see Box 1 Figure 1). More than one in four young people in Bangladesh, Indonesia and the Philippines are neither in education nor employment. In Cambodia, where the official youth unemployment rate is close to zero, the NEET rate is significantly higher at 7.2 per cent. In all four countries, the share of young women NEET is notably higher than that of young men, with the highest gender gaps in Bangladesh (32.7 percentage points) and Indonesia (16 percentage points).

Youth disengagement and underutilization represents a waste of human resources and productive potential that can have devastating effects for societies, economies and political systems. In this regard, policy-makers should pursue a multi-pronged approach adopting employment-centred macroeconomic policies that support stronger aggregate demand and improved access to finance. Other essential measures include developing education and training systems that ease the school-to-work transition, investing in sound and integrated labour market policies, fostering youth entrepreneurship and ensuring rights for young people.<sup>1</sup> For example, in the Republic of Korea, initiatives taken in response to the global economic crisis, such as youth internship and entrepreneurship programmes, have helped to alleviate the youth employment challenge in recent years.<sup>2</sup>

<sup>1</sup> ILO: *The youth employment crisis: A call for action*, Resolution and conclusions, International Labour Conference, 101st session (Geneva, 2012). Also see M. Matsumoto et al.: *Tackling the youth employment crisis: A macroeconomic perspective*, Employment Sector Working Paper No. 124 (Geneva, ILO, 2012).

<sup>2</sup> ILO and World Bank: *Inventory of policy responses to the global financial and economic crisis of 2008* (2012).

Box 1 Figure 1: Share of youth not in education and not in employment, ages 15-24 (%)



Source: Official national sources as referenced in ILO: *Decent Work Country Profile Bangladesh* (Geneva, 2012, forthcoming); ILO: *Decent Work Country Profile Cambodia* (Geneva, 2012); ILO: *Decent Work Country Profile Indonesia* (Geneva, 2011); and ILO: *Decent Work Country Profile Philippines* (Geneva, 2012).

### ...decent jobs for young people a major challenge...

Labour market prospects for youth in parts of the Asia-Pacific region remained dim, as unemployment among young jobseekers is high in a number of industrialized and emerging economies (see Figure 3).

Despite mixed progress nearly one in five young people in the labour force are unemployed in Indonesia and around one in six in Taiwan (China), Hong Kong (China), the Philippines and New Zealand.

In Australia youth unemployment increased to 11.8 per cent in September, while in Japan the youth unemployment rate edged downward to 7.8 per cent in August. Similarly, unemployment among young people in the Republic of Korea fell slightly by 0.4 percentage points to 7.6 per cent in September.

Figure 3: Youth unemployment rate, latest period 2012 (%)



Note: Rates are not seasonally adjusted; ages 15-24, except Hong Kong, China (ages 15-19); Macau, China (ages 16-24); and Singapore (Residents ages 15-29).

Source: National statistical offices; ILO: Laborsta.

The challenge created by the mismatch between skills and labour market requirements is significant. In Malaysia more than 70 per cent of nearly 340,000 registered jobseekers in July 2012 were young people (aged 15-24). However, during that period, there were fewer than 1,700 job placements, leaving more than 153,000 registered vacancies unfilled.<sup>8</sup>

The situation for young people in the Pacific Islands is also concerning. In Samoa and Vanuatu, youth make up nearly 60 per cent and 50 per cent of the total unemployed population respectively. In the Marshall Islands economically active youth are nearly three times as likely to be unemployed as their adult counterparts.<sup>9</sup>

Given the uncertain global economic environment, youth unemployment is projected to edge slightly upwards in 2013, to 13.5 per cent in South-East Asia and the Pacific and to 9.7 per cent in both South Asia and East Asia.<sup>10</sup>

Unemployment among youth however is only one dimension of the challenge as there are far more young people working in poor quality and low-paid jobs than there are unemployed. In developing Asia, poverty rates are commonly higher among working youth than working adults.<sup>11</sup> Policy-makers in the region must focus their growth strategies on fostering an employment-oriented macroeconomic environment and adopt policies that support opportunities for young people (see Box 1).

### Box 2: Improving job quality in Viet Nam

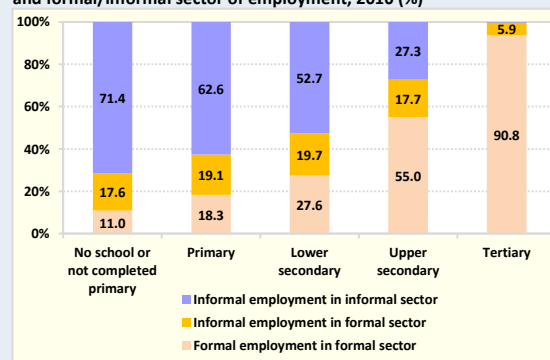
Informal and vulnerable employment are major features of Viet Nam's labour market. Approximately half of Viet Nam's workers are engaged in low productivity, agricultural activities, and two out of three are informally employed.<sup>1</sup> Informality is high in both rural and urban settings – accounting for two-thirds of rural, non-farm employment, and half of all urban employment. The highest levels of informality are in the trade sector – 81 per cent in rural areas and 63.7 per cent in urban areas. So, while open unemployment rates remain low, there are major concerns about the poor quality of employment, since those who are informally employed typically earn low incomes and work in unsafe and insecure conditions.

Informal employment is closely related to educational attainment (see Box 2 Figure 1). Workers in the informal economy have lower educational levels than workers in the formal sector. Most people with tertiary education are formally employed, while a majority of those with incomplete primary education or less are in informal employment. This highlights the importance of education and skills development in fostering decent work in Viet Nam.

As the Government continues to prioritize poverty eradication and sustainable growth in national development, special attention must be paid to the informal sector, where most poor workers are concentrated. Consequently, policy initiatives have been aimed at improving incomes, job quality, labour conditions and equity. The introduction of the Unemployment Insurance Scheme and the endorsement of the Social Protection Floor Initiative (which commits to providing basic income security and services to all Vietnamese) are important developments. The recent Party Resolution on Social Policies, issued in June 2012, sets the target of extending social security to half the labour force by 2020. This ambitious target will require the right combination of high growth and investment to revamp education and skills development, in order to support improvements in the productivity and competitiveness of the private sector. In line with this strategy the Government ratified the Employment Policy Convention, 1964 (No. 122) in June 2012 and is developing a national employment policy and an employment law to create conditions for full, productive and freely-chosen employment for all women and men.

Viet Nam's programme for improving safety and health in the workplace also includes a special focus on the informal economy and rural workplaces. The Government's Scheme on Vocational Training for Rural Labourers up to 2020 and the ILO's Youth Employment in Rural Areas Programme aim to support Viet Nam's efforts to address the critical challenge of rural development (including skills improvement) that is highlighted in the Socio-economic Development Plan and Youth Development Strategy.

Box 2 Figure 1: Distribution of employed persons by education level and formal/informal sector of employment, 2010 (%)



Source: Viet Nam General Statistics Office: *Labour force survey 2010, second round* (Hanoi, 2010).

<sup>1</sup> Viet Nam General Statistics Office: *Labour force survey 2010, second round* (Hanoi, 2010).

### ...and slow progress on improving job quality

The persistence of low numbers of workers in wage employment is indicative of the poor quality of jobs in the developing Asia-Pacific economies (which is partly due to the slow pace of structural change) and the continued prevalence of vulnerable employment in the form of own-account or contributing family workers.

In Thailand, the vulnerable employment rate stagnated at around 53.2 per cent in the second quarter. Conversely, in the Philippines it declined by 3.3 percentage points to 36.9 per cent in the third quarter. Meanwhile, recent progress in Indonesia (where the percentage of own-account and contributing family workers fell to 58.0 per cent in February 2012) was somewhat offset by a spike of more than 811,000 casual, non-agricultural jobs, an increase of 15.7 per cent.<sup>12</sup>

Pacific Island countries face similar concerns about employment quality. In Samoa, for example, nearly half of all workers were an own-account worker or in subsistence agriculture. In the Marshall Islands the share of workers in non-wage employment was lower, but still around 25 per cent.<sup>13</sup>

Low education attainment is strongly connected to poor quality jobs. In this regard, initiatives in Viet Nam to improve the quality of employment have focussed on enhancing skills of rural workers, in addition to extending social protection and other measures (see Box 2).

Workers engaged in vulnerable and casual jobs often work in informal conditions with low earnings and limited legal and social protection. Informal employment is pervasive throughout developing Asia, particularly in the South and South-East Asia subregions (see Figure 4).

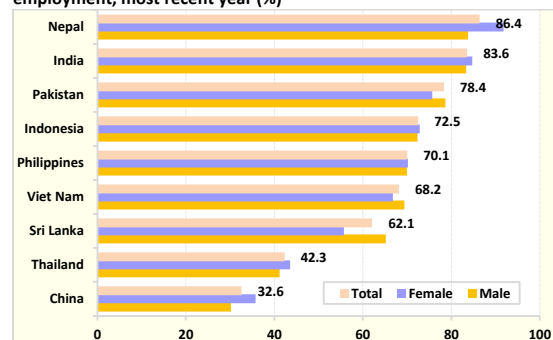
Around four out of five workers in Nepal, India and Pakistan are employed informally in the non-agricultural sector. In Indonesia, the Philippines and Viet Nam, the proportion was around 70 per cent. In a slight majority of the countries where data are available, informal employment was more common among female workers, and in Nepal it was as much as 8.0 percentage points higher for women than men. Among other factors, this widespread informality poses formidable challenges for social protection systems in the region (see Box 3).

Recent analysis of labour market trends in India during the past five years reveals that the overall share of informal employment actually increased slightly between 2004-05 (92.4 per cent) and 2009-10 (92.8 per cent). In addition, there was a movement of

agricultural workers into informal non-agricultural sectors (mainly construction) and the number of casual workers increased by 16.7 per cent during this same period.<sup>14</sup>

Improving job quality and working conditions for Asia's formal wage workers should also be a priority. The recent tragedy at a Pakistan garment factory underscores the importance of ensuring workplace safety and health and investing in sound labour inspection systems.<sup>15</sup>

Figure 4: Informal employment as a share of non-agricultural employment, most recent year (%)



Note: Indonesia includes only Banten and Yogyakarta; Sri Lanka excludes the Northern Province; China covers six urban areas.

Source: ILO: *Statistical update on employment in the informal economy* (Geneva, June 2012); National statistical offices.

### Box 3: Strengthening social protection in Asia-Pacific

Social protection has moved up the policy agenda across Asia and the Pacific for a number of reasons. First, while millions of the region's workers and their families escaped extreme poverty in recent decades, the 2008 global economic crisis showed how they face continuing uncertainty and risks, with many remaining quite vulnerable to any kind of economic, social or environmental shock. Social protection systems have been critical as an automatic stabilizer during the slowdown, particularly where schemes were quickly scaled up to exert a counter-cyclical effect.<sup>1</sup> Moreover, for some countries in the region the crisis also underscored the important role of social protection systems in helping to rebalance economic growth towards greater domestic demand and away from an overdependence on exports.

Second, Asia is ageing rapidly. Fertility rates have fallen and old-age dependency ratios have increased in both industrialized economies and middle-income countries such as China, Sri Lanka and Thailand.<sup>2</sup> This demographic transition is focusing attention on old-age pensions and health care systems. However, on average only three in ten persons above the retirement age in Asia and the Pacific receive a pension; the proportion ranges from around 3 per cent in Cambodia and Vanuatu, to nearly 70 per cent in Nepal and Japan, to universal coverage in New Zealand.<sup>3</sup>

Third, limited social protection coverage and low benefit levels underscore a distinct challenge for the region, namely the wide prevalence of informal workers and the need to integrate them into formal social protection regimes, not least because poverty and vulnerability are often greatest among these workers.

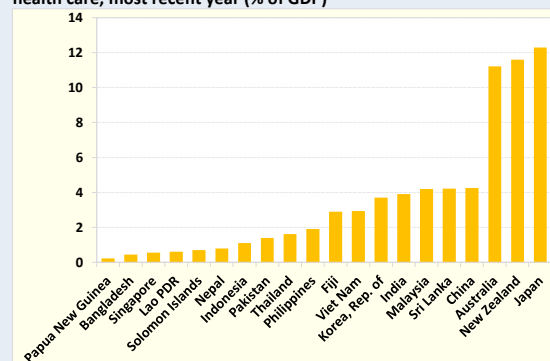
Historically, investment in social protection has been low in Asia and the Pacific in comparison to other regions.<sup>4</sup> In one-half of the countries where data are available, public social security expenditure is less than 2 per cent of GDP (see Box 3 Figure 1). In the emerging economies of India, Malaysia, Sri Lanka and China, the share is slightly higher at around 4 per cent. Notably, in the advanced economies of Australia, New Zealand and Japan the share is around 11-12 per cent.

Economic, social and demographic factors will necessitate greater investment in fiscally sustainable social protection regimes. To this end, the 101st session of the International Labour Conference on June 14 adopted Social Protection Floors Recommendation, 2012 (No. 202). Social protection floors are nationally defined sets of basic social security guarantees that ensure all in need have access to essential health care and basic income security, including children, older persons, and those of working-age who are unable to earn sufficient income.<sup>5</sup>

Countries across the region have made significant strides in terms of social protection reforms. Thailand established a universal health care scheme in 2002, and in October last year Indonesia passed legislation to provide universal health insurance from January 2014. In the Philippines 85 per cent of the population is now covered by the government-owned health insurer, while India has extended basic health insurance to approximately 110 million people.<sup>6</sup> China has managed to expand basic healthcare access to more than 95 per cent of its population following reforms launched in April 2009 at a cost of US\$133.5 billion.<sup>7</sup>

Efforts go beyond improving healthcare access. In India, the Mahatma Gandhi National Rural Employment Guarantee Act guarantees 100 days of employment per year to every rural household. Pakistan launched the Benazir Income Support Programme in 2008 as a cash transfer scheme to the poorest households. Indonesia and the Philippines have also introduced conditional cash transfer programmes for poor families. Viet Nam established its unemployment insurance scheme in 2009, Thailand introduced pensions to informal workers in May 2011, and Cambodia launched a National Social Protection Strategy in 2011, which aims to consolidate existing disparate schemes into a streamlined system for delivering services.

Box 3 Figure 1: Public social security benefit expenditure, excluding health care, most recent year (% of GDP)



Source: ILO: *World Social Security Report 2010/11: Providing coverage in times of crisis and beyond* (Geneva, 2010).

<sup>1</sup> P. Huynh and A. Parisotto (eds.): *Case studies of policy coherence initiatives in developing Asia* (Bangkok, ILO, 2012).

<sup>2</sup> ILO: *Asia-Pacific Labour Market Update* (Bangkok, Dec. 2011).

<sup>3</sup> ILO: *World Social Security Report 2010/11: Providing coverage in times of crisis and beyond* (Geneva, 2010).

<sup>4</sup> ILO: *Building a sustainable future with decent work in Asia and the Pacific: Report of the Director-General* (Geneva, 2011), p. 18.

<sup>5</sup> ILO: *Text of the recommendation concerning national floors of social protection*, PR No. 14A, International Labour Conference, 101st Session, Geneva, 2012.

<sup>6</sup> *The Economist*: "Asian welfare states: New cradles to the graves", 8 Sep. 2012.

<sup>7</sup> ILO: "China's latest revolution: Basic health care for all", 3 Sep. 2012.

## Recent publications



ILO. 2012. *World of Work Report 2012: Better jobs for a better economy* (Geneva). The annual report examines the performance of different countries since the start of the global crisis through the prism of the quantity and quality of jobs. It provides a comprehensive analysis of recent labour market and social trends, assesses risks of social unrest and presents employment projections for the next five years. The report emphasizes that while employment has begun to recover slowly, job quality is deteriorating and there is a growing sense of unfairness.

## Forthcoming publications

ILO. 2012. *2012 World report on child labour: Economic vulnerability, social protection and child labour*, Dec. (Geneva).

ILO. 2012. *Domestic workers across the world: Global and regional statistics and the extent of legal protection*, Dec. (Geneva).

ILO. 2012. *Global Wage Report 2012-13*, Dec. (Geneva).

## Data and statistics

ILO Asia Pacific Youth Employment Network (APYouthNet) Statistics | <http://www.apyouthnet.ilo.org/stats>

ILO Global Wage Database | <http://www.ilo.org/travail/info/db/lang--en/index.htm>

ILO Key Indicators of the Labour Market (KILM) | <http://www.ilo.org/kilm>

ILO Laborsta Database | <http://laborsta.ilo.org>

ILO Short term indicators of the labour market | [http://laborsta.ilo.org/sti/sti\\_E.html](http://laborsta.ilo.org/sti/sti_E.html)

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<sup>1</sup> This update was prepared by Sukti Dasgupta, Phu Huynh and David Williams of the Regional Economic and Social Analysis Unit and Carlos Galian, Nguyen Than Thuong and Gyorgy Sziraczki of the ILO Country Office for Viet Nam, with editing by Sophy Fisher and contributions from Uma Rani Amara, Matthieu Cognac, Thiraphap Fakthong, Tite Habiyakare, Steffi Jochim, Kee Beom Kim, Chang-Hee Lee, Malte Luebker, Aurelio Parisotto and Sher Verick. It provides a snapshot of economic and labour market trends for selected Asian economies based on official data available as of 15 October 2012. Due to variations in national definitions, data presented for different economies are not strictly comparable.

<sup>2</sup> Asian Development Bank: *Pacific Economic Monitor* (July 2012).

<sup>3</sup> China, for example, eased monetary policies in the first half of 2012 and announced the approval of 30 infrastructure projects totalling US\$157 billion in early September. See: Pete Sweeney: "China approves 30 infrastructure projects – paper", in *Reuters*, 7 Sep. 2012.

<sup>4</sup> Asian Development Bank: *Asian Development Outlook 2012 Update: Services and Asia's future growth* (Manila, Oct. 2012).

<sup>5</sup> World Bank: *Food Price Watch* (Aug. 2012).

<sup>6</sup> Unemployment rates are based on national statistical offices.

<sup>7</sup> ILO: *Global Employment Outlook: Bleak labour market prospects for youth* (Geneva, Sep. 2012).

<sup>8</sup> Malaysia Ministry of Human Resources: *Labour Market Report 2012: July* (2012).

<sup>9</sup> Republic of the Marshall Islands, Economic Policy, Planning and Statistics Office: *The RMI 2011 Census of Population and Housing: Summary and Highlights Only* (Feb. 2012); Samoa Bureau of Statistics: *Population and Housing Census 2011: Tabulation Report v.1* (July 2012); and Vanuatu National Statistics Office: *2009 National Census of Population and Housing: Summary Release* (Aug. 2010).

<sup>10</sup> ILO: *Global Employment Outlook: Bleak labour market prospects for youth*, op. cit.

<sup>11</sup> ILO: *Key Indicators of the Labour Market, 7<sup>th</sup> edition* (Geneva, 2011), table 18b.

<sup>12</sup> Badan Pusat Statistik (Statistics Indonesia); Philippines National Statistics Office; and Thailand National Statistics Office. In Indonesia, a casual worker is defined as "a person who works at her/his own risk without the assistance of his/her family members or employees." See: Badan Pusat Statistik (Statistics Indonesia): *Labor force situation in Indonesia February 2012* (Jakarta, 2012).

<sup>13</sup> Republic of the Marshall Islands, Economic Policy, Planning and Statistics Office, op. cit.; Samoa Bureau of Statistics, op. cit.

<sup>14</sup> Santosh Mehrotra et al.: "Creating employment in the Twelfth Five-Year Plan", in *Economic & Political Weekly*, Vol. XLVII, No. 19, 12 May 2012, pp. 63-73. A casual worker is defined as "a person casually engaged in other's farm or non-farm enterprises (both household and non-household) and getting in return wage according to the terms of the daily or periodic work contract." See: India Ministry of Statistics and Programme Implementation: *Introduction: Concepts, definitions and procedures*.

<sup>15</sup> Zia ur-Rehman et al.: "More than 300 killed in Pakistani factory fires", in *The New York Times*, 12 Sep. 2012.