

Title	Japan's labor market : continuity and change
Sub Title	
Author	Evans, Robert, Jr.
Publisher	
Publication year	1988
Jtitle	Keio business review Vol.25, (1988.) ,p.83- 94
JaLC DOI	
Abstract	
Notes	
Genre	Journal Article
URL	https://koara.lib.keio.ac.jp/xoonips/modules/xoonips/detail.php?koara_id=AA00260481-19880000-03920119

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JAPAN'S LABOR MARKET: CONTINUITY AND CHANGE

by

Robert Evans Jr.

In the Tsukudajima section of Tokyo a tall new silver apartment house towers over streets of two story wooden houses which look like a set from a movie about Japan at the time of the First World War. Yet these are ordinary homes on an island left untouched by the Great Kanto Earthquake of 1923 and the fire bombs of World War II. Will old and new continue to exist in uneasy equilibrium, or will the opening of a new subway station which places the island only minutes from the Ginza in downtown Tokyo lead to massive change? A slowdown in economic growth rates and a rising value for the yen have raised similar questions concerning historical institutions in the labor market. Will major changes occur? Here we seek to answer this question by examining the degree to which changes have occurred since the oil shock and the resulting slowdown in Japanese growth.

The Japanese labor market has fascinated viewers, foreign and Japanese, for a number of years. Initially the postwar patterns of lifetime commitment until the age of retirement from the firm (often in error called lifetime employment), an age and seniority-based wage system, and enterprise unions were viewed as anachronisms which would be swept away by modernization. Later the very real strengths of these institutions, their exact nature, and the historical forces which produced them came to be understood and appreciated (Shimada 1983:)

Despite current recognition that these institutional practices in the labor market have contributed to Japan's economic success, each major change or development in Japan's modern economic history has caused some scholars and journalists to predict the transformation of these unique Japanese patterns. Almost 20 years ago Robert E. Cole suggested that changes were afoot, (1972:618, 623) though he added that it was, "... premature to write an epitaph," (1971:69). The suggestion of change was supported by cited upward movements between 1959 and 1968 in the rate of job changes in one year. In Table I it can be seen that between those years there was a 56 percent increase. Yet the trend toward increased job changing did not continue.

With a high value for the yen and increased internationalization of the economy have come renewed expectations of change. Recently Davis Barrager wrote, "Winds of change are sweeping through modern Japan's employment and educational worlds with all the fury of a late summer typhoon." (1988:5). A glance at train station newspaper kiosks provides some support for such expectations. The May 19th, 1989 issue of *Torabaayu*

Table I The Rate of One Year Job Change (Males)

Year	I No. not changing ('000)	II No. changing ('000)	III No. desire change ('000)	IV Change rate (II/I + II)	V Change/ desire (II/III)
1959	24,427	641	1,054	2.56	.61
1962	25,051	919	1,055	3.54	.87
1965	26,366	975	932	3.57	1.05
1968	28,149	1,169	1,323	3.99	.88
1971	29,556	1,207	1,383	3.92	.88
1974	30,240	1,363	1,516	4.31	.89
1977	31,474	975	2,455	3.00	.40
1979	31,814	1,106	2,751	3.48	.40
1982	32,698	907	2,749	2.98	.33
1987 [#]	33,541	1,511	3,341	4.28	.45

* This is for those whose yearly activity was "Working". The figures for "Mainly Working" were 33,041, 1,434 and 4.16.

Sources: 1959-1982; Management and Coordination Agency, 1988B: 79. 1987; Management and Coordination Agency 1989C: Vol. I: 450, 544.

contained an article outlining the 46 steps needed to successfully change jobs. It also had many hundreds of advertisements for part-time workers and *haken rōdōsha* (dispatched workers). The latter would be employed by well-known international temporary employment service firms such as Manpower, Adia, etc.

Are Japanese labor markets undergoing major changes? Are the labor market's "three treasures" to quote Haruo Shimada (1983:8), life-time commitment, age-based wages, and enterprise unions, about to be replaced? Will the levels of mobility, the hourly wages, and the non-union status of the *haken rōdōsha* (dispatched workers) come to characterize core workers?

Change in the labor market may come in two ways, boldly and with drama like a new volcano, or quietly like the first rays of dawn. Major changes affecting most companies and workers may occur rapidly as they did in the Shunto wage negotiation system in the late 1970's. Or old systems and values may remain for years. They may be maintained or they may be slowly and steadily replaced by new systems and values in new industries, new firms, and for new employees. This latter is a pattern observed for union membership in the United States (Kochan, Katz, and McKersie 1986). Consequently it is necessary to examine what has and has not happened to standard measures for established sectors of the economy as well as what is occurring in new areas. The standard measures are examined in section one and the new areas in section two. A third section summarizes the results and draws conclusions.

I. The Established Labor Market

A) Expectations of change

The strength of the expectation that Japanese labor markets will change depends upon perceptions of the source of current institutional practices. A belief that they are deeply rooted in the history and culture of Japan suggests less change than if it is believed that particular economic events and circumstances gave rise to those practices. As those particular situations change, an expectation of change in the labor market follows. Many recent visions of a forthcoming transformation in lifetime commitment, age-based wages, and enterprise unions appear to be grounded in a belief that these involve shifting too much of the employment risks inherent in a dynamic world economy from individuals to the firm. This shift could be sustained during years of very rapid economic growth because of de-facto government safety-nets.

The slowdown in Japanese economic growth during the last decade, the increased internationalization of major Japanese companies, and the rapid appreciation of the Japanese yen have changed dramatically the risks faced by Japanese corporations. They also have altered the ability of the government to provide safety nets to firms. Thus the expectation of institutional change. For example, Kimihisa Sato of the Mitsubishi Research Institute said, "... Corporate trends toward diversification and restructuring will require increasing flexibility from workers." (Kanabayashi 1989: 6). This would mean shifting more of the employment risks to employees. This would then require new institutional practices in the labor market. In turn, that would make the Japanese labor market less unique.

Most of those discussions ignore the nature of the postwar large Japanese corporation. The *Zaibatsu* firms of the pre-war years were destroyed by American Occupation policies concerning firms and senior managers, and by the rapid inflation of the early postwar years. The ownership of the large corporation passed out of the hands of families and into the hands of insurance companies and companies related to the firm. Effective control of the corporation passed from families to senior managers made up of men who had served the specific company all of their lives. The large corporation which emerged has been variously described and characterized by Japanese scholars (Komiya 1987 and Nakagawa 1989). To paraphrase Kenichi Omae (1982:218), the situation became one in which labor was hiring capital rather than capital hiring labor.

In the late 1940's and early 1950's these corporations struck a de-facto bargain with their labor unions. The company at high cost would preserve the jobs of core workers over their lifetimes. They would treat blue collar workers and white collar workers equally, but they would not become democratic in their treatment of individual workers. Senior managers would extensively consult with labor leaders, but the right to decide would remain with management. As long as this semi-labor-managed firm concept remains one should not expect workers in large numbers to give up their firms.

B) Potential signs of change

The timing and the nature of expected changes are difficult to predict. The Japanese labor market has never been as inflexible as the concept of lifetime commitment might imply (Cole: 1971:66; Evans 1971:78), and a recent article has stressed the evolutionary nature of Japanese management (Mroczkowski and Hanaoka 1989:41). It is possible that the expected changes would bring about the demise of current institutional practices bringing major impacts which would affect core workers. It is perhaps more likely, as Mroczkowski and Hanaoka have argued (1989), that the only change would be a reduction in the proportion of workers working under lifetime commitments, age-based wages, and enterprise unions.

The basic organization of Japan's labor markets is centered on an employer commitment to do everything possible to maintain employment over the worker's lifetime. Lifetime is understood to mean until the required retirement age, of which the current median is 60 years of age (Ministry of Labor 1988B:6). The commitment also involves the company in providing opportunities for the worker to experience growth in skills, responsibility and income over his (occasionally her) working life. As an employer commitment this concept has dominated decisions and practices for all sizes of firms. As a concept it is well understood, but as a concept it is difficult to measure. One clear implication of the importance of the concept is that inter-firm mobility of workers will tend to be low among younger workers, especially in comparison with a country like the United States. There is clear evidence that this has been true (Evans 1971:78; Cole 1971:66) and continues (Hashimoto and Raisian 1985:723).

If the importance of life-time commitment weakens we should expect greater inter-firm mobility at given levels of economic activity. With increased mobility will come fewer years of average company service, higher turn-over rates, and a less steep slope in the relationship between salaries and length of company service. The latter is necessary if workers are to increase their compensation through mobility.

C) Expected mobility

Actual mobility is the result of two forces, the propensity and the opportunity for mobility. A changing labor market in Japan implies an upward shift in the propensity of Japanese workers to be mobile between firms and an increased willingness by Japanese firms to employ mid-career job changers. Both of these changes may be masked by a downward shift in job opportunities due to weak aggregate demand. How should we interpret a situation where there appears from survey data to be an increased propensity to move but increased mobility is not observed? One answer was given in 1972 by Professor Cole who wrote (616) that the concept of permanent employment should be measured by the "subjective hopes and aspirations" of the parties and not by actual behavior.

Most economists will probably not agree, holding more with Professor Milton Friedman's often cited remark that the proof of the pudding was in the eating. Unless inter-firm mobility changes significantly there will not have been an institutional change. The current Japanese labor market presents just such an ambiguity. The data in Table I

are consistent with the idea that between 1959 and 1965 there was an increase in both the propensity to move and actual mobility. Since the oil shock the propensity to be mobile seems to have gone up. However, actual mobility has not increased except in 1987. This increase especially for younger workers has been cited by Higuchi to support the idea of increased job change (1989).

An appropriate interpretation of the rate of job change in 1987 is not yet possible. The rate comes at the end of our time period, and it is not clear if the 4.28 percent change in jobs represents a structural change, a random event, or a response to an improving labor market. As can be seen in Table II the proportion of job openings to applicants improved from 1986 to 1987 and then recorded a large increase between 1987 and 1988. The data in Table II show that the number of employees who wished to change jobs and who searched for a new job rose by about 17 percent between 1982 and 1987 while the job opening ratio rose by about 13 percent. The large increase in the job openings/job applicant rate in 1988 was not matched by a similar increase in job search by those who indicated a desire to change jobs, and this rate even fell for men between

Table II Measures of the Labor Market

Year	Ratio of job openings to applicants	Change in employees	Desired job change and searched	Searched/employees
1970	1.41	3.3%	...	.....
1971	1.12	3.2	...	.....
1972	1.16	1.5	...	.....
1973	1.76	4.3	101	.0279
1974	1.20	.6	97	.0266
1975	.61	.2	94	.0258
1976	.64	1.8	103	.0278
1977	.56	1.5	113	.0300
1978	.56	.8	121	.0319
1979	.71	2.0	127	.0328
1980	.75	2.5	131	.0330
1981	.68	1.7	129	.0320
1982	.61	1.5	138	.0337
1983	.60	2.7	163	.0387
1984	.65	1.4	163	.0382
1985	.68	1.1	163	.0378
1986	.62	1.5	169	.0384
1987	.70	1.1	175	.0395
1988	1.01	2.5	180	.0397

Sources: Management and Coordination Agency 1989A: 3, 11 and Ministry of Labour 1988B: Appendix pp. 10-11.

1987 and 1988 (Management and Coordination Agency 1988A:66 and 1989A:68). Thus it seems reasonable to argue that, as yet, mobility and desired mobility for regular male employees in the labor market have not undergone a structural shift.

Are current opportunities for job mobility so poor that they inhibit desires for change in the institutional fact of life-time commitment? Table II contains two measures of aggregate job opportunities for the years 1970 to 1987. These are the ratio of active ordinary job openings to active applicants at the Public Employment Office (both excluding new graduates), and the percentage change in the number of employees. The impact of the oil shock and the slowdown in Japanese growth early in the 1970's are clearly evident.

The ratio of job openings to job applicants fell by 50 percent though the average number of jobs listed fell by only about 13.8 percent. In 1988 it was much closer to its high growth-rate levels. The annual increase in the number of employees in the 1980's was about one-half the rate observed in 1970 to 1974. These measures suggest a once-and-for-all downward shift in employment opportunities in the early 1970's but little subsequent variation in the new level of employment opportunities. Examination of the rate of growth in real national product and the unemployment rate suggest a similar picture of the economy. On balance I conclude that the labor market has been buoyant enough so that actual mobility should have risen if significant institutional changes had occurred.

D) Evidence from the labor market

To understand the degree to which the labor market may be undergoing fundamental changes one can examine: a) changes in the proportions of *hyōjun rōdōsha* (standard workers), b) changes in the proportions of *Chūtōsaiyōsha* (mid-career job changers), c) wage gains following job changes, and d) separation rates.

D-1) Years of service

A standard worker (*Hyōjun Rōdōsha*) is one whose continuous service with the current employer is consistent with life-time commitment. The proportion of male standard workers in different industries and at different ages varies. In 1987 in large manufacturing firms the high was over 70 percent at ages 35 to 39 and for men 55 to 60 years of age the proportion was about 55 percent. In retail trade the comparable figures were 27 percent and 15 percent. Over the decade 1977 to 1987 the proportion of standard workers increased in manufacturing, retail trade, and services except for workers ages 25 to 29 and to age 34 in retail trade. The proportion of standard workers among those 25 to 29 years of age has declined by 5 percentage points in manufacturing and 10 percentage points in services. As these increases in the proportion of standard workers imply, average years of service with the employer, with a few exceptions, have risen. The exceptions are for younger workers. In Manufacturing there was a decline in the average number of years of service for 20 to 24 year olds between 1977 and 1982 and for 25 to 29 year olds over the decade. In retail trade the declines were only between 1977 and 1982. For retail trade it was in the age group 20 to 34 years of age, and in services through age 29 (Ministry of Labor 1988C:244).

D-2) Mid-career job changers

The opposite of the standard worker is the *Chūtōsaiyōsha* (mid-career job changer). On an annual basis their number can be measured by the number of older workers with less than one year of service in their current firm. In any given recent year less than 10 percent of those in the labor market are in this category. The distribution by ages is U shaped with the lowest proportion found among men of ages 40 to 50.

In a changing labor market the proportion of mid-career job changers should be increasing. Yet for broad industry groups the proportion of *Chūtōsaiyōsha* fell between 1977 and 1987. Not even within the rapidly growing service sector, nor at younger ages, except for very large employers, was there any suggestion of major changes. (Ministry of Labor 1988C:246).

D-3) Wage gains from mobility

An increase in inter-firm mobility among voluntary job changers should be accompanied by a larger proportion of workers receiving higher wages in their new position. In 1986 approximately 35 to 40 percent of voluntary job changers up to the age group 35 to 44 years of age obtained new jobs in which their wages were higher by 10 percent or more than in their previous positions. Similar proportions were observed in 1976 and 1981. For all male employment changers the 1987 proportions were essentially equal to those for 1976, 1981, and 1986 (Ministry of Labour 1988C:258 and 1988E:29). For all job changers the 1987 proportions for men who received 10 percent or greater wage increases were essentially equal to those in 1976, 1981, and 1986 (Ministry of Labour 1988E:29). If wages rise to attract new employees one might expect that there would be an increase in the proportion of job leavers who gave "inadequate income" as their reason for the job change. This has not been true. Over the decade 1976–1986, for both men and women, the proportion giving inadequate income as the reason for a job change has steadily declined (Ministry of Labour 1988C:264).

If opportunities for employer mobility are expanding for younger workers one might expect to see it reflected in greater wage increases for younger workers compared to older workers among those who separated from their last job for personal reasons. This does not seem to be the case. In 1986 for men 29 years of age and younger, 5.5 percent received more than a 30 percent increase in their wages and 38.7 percent received a 10 to 30 percent increase. Both of these were only slightly more than the proportions for men 30 to 34 years of age who changed jobs, while 1987 data show no particular changes. Women had similar patterns. (Ministry of Labour, 1988C: Appendix 102 and 1988E:29). Data for 1987 show no particular change (Ministry of labour 1988E:29).

D-4) Separations

At given levels of economic activity a changed and more mobile labor market implies increased separation rates as workers take advantages of new opportunities. This has not occurred. For all reported industries and firms of 30 or more employees the separation rate was 30.8 percent in 1965, 29.7 in 1970, and it dropped to 22.1 in 1975 after the oil shock. Since then it has drifted down to around 19 percent. There are more separations in the faster growing service sector. The 1987 rate was 18.3, very close to 1975's 18.0 and down slightly from the 20.7 in 1970.

The reasons given for separations have changed. In 1970 78.9 percent of all separations in manufacturing were for personal reasons. By 1986 this was down to 70.7 percent. Similar declines were found for workers in smaller firms as well. Increases in retirements, the ending of term-contracts, and "needs of the enterprise" make up for the difference. These latter two may suggest a labor force developing some increased flexibility on its edges, but pushed rather than pulled.

II. Non-Regular Workers

A 1987 survey of the Ministry of Labor found that 84 percent of employees were regular employees and 16 percent were grouped into one of six non-regular categories. These were: (a) dispatched workers, (b) loaned workers, (c) part-time workers, (d) temporary and day workers, (e) contract and registration workers, and (f) other non-regular workers. As can be seen in Table III, more than one-half of these workers were part-time workers, 62.0 percent. A little more than one-half of all establishments reported using part-time workers, while 6.3 percent, the smallest proportion, reported using dispatched workers. The greatest use of non-regular workers was in restaurants while the smallest use was reported by the transportation and communication industry. By functional units within the firm their greatest use was in production, 16.3 percent and the least use was in research and development units (Ministry of Labour 1988D:IV 1-4).

The number of different categories of non-regular workers, six, and the common usage of two additional ones, *arubaito* and *shokutaku*, compared to the United States' usage of only two categories, temporary workers and part-time workers (Belous 1989:9) is consistent with the idea that the Japanese labor market is a mosaic of different roles for different people. This is re-enforced by the data in Table IV which sets out the reasons given by employers for increasing their use of different categories of workers. The workers in these categories appear to supplement and maintain the main permanent commitment portion of the labor market. Change in the commitment portion of the market would imply that these other workers would come to be used more as substitutes and alternatives rather than as supplements.

A) *Shukko* (loaned workers)

Loaned workers are a special form of employees relatively unique to Japan. They exist because of the very close sub-contractor relationships. The loaned worker both brings needed human capital to the sub-contract firm and provides the parent firm with a level of employment flexibility during difficult times. Transferred workers may also gain skills and provide a measure of parent company control in the related company. In particular it is a way for firms to maintain their de facto employment commitment without having the worker at the parent company job-site. If there is change in the labor market it ought to appear here with fewer people involved. This is because firms would no longer try to provide alternative places for unneeded employees through *shukko* but would just lay them off. This does not seem to be the case. Between 1983 and 1987 there was no particular shift in the utilization of loaned workers, though the proportion of

Table III Non-Regular Employees, 1987

Categories						
	Loaned	Dispatched	Part-time	Temporary	Contract	Other
% Emp.	1.2%	.6%	9.9%	2.6%	.9%	.9%
Percent of Establishments Using						
Manufact.	14.9%	4.3%	60.2%	22.4%	3.8%	8.5%
Utility	12.6	3.3	20.8	40.5	17.0	22.5
Trans & commun	14.3	3.1	30.8	21.2	5.1	6.2
Trade	14.5	6.1	63.5	14.5	7.9	8.9
Finance & insur	7.6	19.1	39.9	13.5	16.0	10.6
Real estate	36.0	10.9	32.4	27.7	11.9	12.4
Services	14.0	6.9	50.6	29.6	12.0	11.1
All	14.1	6.3	53.7	21.3	7.7	9.1

Source: Ministry of Labor 1988D:IV-1. A portion of this report was published in Vol. 40, November, 1988 issue of *Rōdō Tōkei Chōsa Geppō* (Monthly Labor Statistics and Research Bulletin):29-36.

Table IV Reasons for Increasing the Number of Employees

Reason	Type of Employee					
	Regular (%)	Loaned (%)	Contract (%)	Dispatched (%)	Part-time (%)	Temporary (%)
Diversity of bus.	14.0	....	....	....	19.3	14.8
Growth in business	52.1	34.5	14.1	21.0	32.3	23.4
Light work	....	....	....	....	32.4	23.3
Need skilled W. now	....	25.2	30.7	34.1	....	....
Need skilled W. short time	....	....	....	24.8	17.4	32.6
Reduce cost	....	....	15.5	33.4	40.2	32.1
Re-employ retired	....	....	35.4	....	....	....
Request of parent company	....	26.0	....	....	....	....
Strength of Bus.	19.0	....	....	....	....	....

These answers are from establishments which had increased their work force in the last three years.
Source: Ministry of Labour 1988D:IV-3.

workers over the age of 40 who are shukko workers for retirement reasons has increased since 1980 (Uenishi 1989:13, 15).

B) *Part-time workers*

The majority of non-regular workers are part-time workers and most of them are married women. This is a rapidly expanding segment of the labor market. The number of less than full-week workers (less than 35 hours a week) in non-agricultural establishments who were female has increased by almost a factor of two since 1970. The numbers went from 8.9 percent in 1960 to 12.2 percent in 1970, and to 23.1 percent in 1987 (Ministry of Labor, 1988D:61). Since 1980 the increase has been 19.5 percent, most of which has occurred among women working 15 to 34 hours a week (Ministry of Labor 1988C: Appendix 32–33).

In 1987 less than 35-hour-a-week employees were about 10 percent of employment in firms of 30 and more workers and almost twice that number in firms of 1 to 29 employees, though growth in these categories since 1980 has been fastest in firms of 100 to 499 employees and slowest in firms of 500 and more employees. Despite this growth, and probably additional growth, in the future part-time workers are not apt to be substitutes for core workers and thus a threat to the permanent commitment system. For example, among regular female employees an increasing number, 52.3 percent in 1987, report that they provide the principal livelihood. Among part-time workers, assisting with household expenses is still the major reason given for working. In addition over the last decade the rate of wage increase for part-time workers has lagged behind that for regular workers. It seems clear that employers largely see part-time workers as filling a particular place in their labor needs (Okunishi and Kodaira 1988:8, 10, 11).

C) *Haken rōdōsha* (dispatched workers)

With legalization in 1986 the number of companies and workers involved as dispatched workers (called temporary employment service workers in the United States) has markedly increased. They are not a random sub-set of the labor force. Within the building services sector they are primarily older males (Sano 1987:67). Among woman dispatched for office work, they are considerably younger and less apt to be married than is the typical women in the labor force (Evans 1989:19). The haken rōdōsha appear largely to be employees in a new form of subcontracting designed to provide highly specialized skills to corporations and to provide workers whose duties fell outside the pattern for core workers. Consequently they appear to re-enforce the traditional labor force pattern rather than to be the harbingers of change (Evans 1989:25–27).

III. Evaluation

In the classic murder mystery evidence points in many directions and involves several individuals, but eventually there is a clear pattern. The Japanese labor market shares some of these attributes. There are changes to be seen, especially in Tokyo and among foreign firms. There is an increased use of specialized labor groups. The proportion of women

who work continues to grow. Still, turnover rates and the proportions of job changers receiving various percentage wage increases suggest that lifetime commitment as a concept and as a characterization of the current life of core workers in larger enterprises remains strong. Consequently the weight of the evidence supports the idea that the labor market exhibits a basic continuity with its past.

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