

グローバル競争と外国人雇用

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1. アジアにおける“事実上の経済統合”

- (1) EUが形成され、なおも拡大する欧州に比べ、アジアは経済統合という面で大きく立ち遅れているとの指摘が聞かれる。しかし、アジアにおけるグローバル企業の分業体制を子細にみていくと、事実上の経済統合がすでにかかなりのレベルにまで進んでいることがわかる。
- (2) アジア域内では、モノ、カネ、サービス、情報の移動とともにヒトの移動も必然のものとなっている。日本の場合、中国からの留学生、研修・技能実習生が目立つが、アジアにおける日本企業の進出先が多様化するなかで、各国の現地法人から研修生、企業内転勤などで来日し、研修・就労する外国人も増えつつある。彼らは、単なる現場の作業員ではなく、日本の進んだ技能を習得する技能者や生産ライン、人事・労務、総務、ITシステムなどを管理する技術者・専門家の卵である。

2. パートナーとしての中国、ライバルとしての中国

- (1) 中国は、市場の規模、成長のスピード、購買力の拡大、どの面からみても魅力的な市場であり、日本製品の最大の顧客になりつつある。人材も豊富で、アジアの経済統合のなかで、人材供給の役割を果たしている。
- (2) 今日、中国は、明確な成長戦略をもち、経済大国、科学技術立国の道をひた走っており、その意味で日本にとって脅威であろう。中国は早晩、あらゆる工業製品の生産を手がける、工業大国になろう。日本がさらに高付加価値製品の開発・生産に向かわなければ、中国の大きな「山」に飲み込まれてしまうことになる。

3. コスト競争から付加価値競争へ、雇用を巡る新しい動き

- (1) 中国国内において、さまざまな工業製品が安価で大量の労働力を活用し生産されている状況のなかで、日本国内での生産も、まずはコストの削減が目標とされ、日系人等外国人労働者の活用や日本人の非正規社員化が進んだ。
- (2) その一方で、日本のグローバル企業が中国などアジア域内で生産拠点を設ける際に、日本国内での事業と棲み分けを行うようになってきている。すなわち国内では、研究開発や設計、あるいは相対的に付加価値の高い製品の生産に特化する。そうした生産現場では、従来までの請負・派遣を通じた日系人等の活用から、日本人の直接雇用にシフトしつつある。これは、中国との間で、無用なコスト競争をするのではなく、利益率を確保できる新製品や高級品を開発、生産することで、企業価値を高めようという事業戦略である。
- (3) 日本の場合、2割以下の就業人口しか持たない製造業、すなわち物づくりの現場の生産性が産業全体の生産性をリードしている。新製品の開発や生産工程での改善などは、潜在成長率のなかでトータル・ファクター・プロダクティビティ（TFP）の寄与というかたちで定義されるが、新製品の開発や生産ラインの改善にはコア人材が欠かせない。そのコア人材は、日本人に限定されない。日本の大学で学んだ留学生や日本の公教育で教育を受けた日系人の

第二世代（三世等）なども活躍できる場を日本企業がつくることができれば、日本の潜在成長率を高めることとなる。

4. 厳しさを増す日系人の雇用情勢

- (1) 外国人雇用数は、集住都市を中心にこのところ急速に減少している。世界的な景気後退が起こる以前からも、中国への工場移転に伴う派遣契約の解消などが発生していた。集住都市で働く日系人の場合、日本で仕事を続けたいという意向が強い。その背景には、治安がよく、子弟教育などの環境がよいことがある。永住権を取得する日系人も増えてきているが、今般の景気後退、雇用情勢の悪化が、今後、日系人の労働、生活にどのような影響をもたらすのか、注視していく必要がある。一部の自治体では、今般の景気後退が短期間で収束しないと想定し、母国への帰国支援を提案しているが、これがこれまで行われてきた多文化社会実現に向けた理念とどう整合するかを十分に吟味することが必要である。
- (2) 子供の教育については、このところ親の関心は高まっており、例えば日系人家庭において父親の仕事が他の都市で見つかり、教育環境の変化をきらい、家族を残し父親だけが単身赴任していくケースが増えている。しかし一方で、親としての責任を果たさない親も少なく、その場合に子供が非行に走ったり、心の病を抱えるなどのリスクも高まる。
- (3) 近年、集住都市では、いわゆる研修・技能実習生として在留する外国人が拡大する傾向にある。同制度の下では、3年間、同じ職場にとどまるため企業としては使いやすく、今後は、これまで日系人が担ってきた仕事の現場に研修・技能実習生が入ってくるとの見方をする関係者もいる。

日系人の第二世代は、すでに10歳代以上の年齢に達しているが、今後、研修・技能実習生が増えてくると、彼らが就ける仕事の選択肢が狭まることが予想される。彼らの職業能力や職業意識を高める取り組みも今後、重要な課題となってこよう。

その観点から、すでに企業が取り組んでいるインターンシップや企業訪問・見学は有効である。学校教育の一環として、外国人、日本人の区別なく就労体験をさせることが、将来にわたり、地域の企業の人材確保の面でもよい影響をもたらす。

5. 結 語

- (1) 地域の中核的企業にとって、人材の確保は、事業継続に向けた生命線ともいえる。日本国内で、若年層の人口が減少するばかりか、アジア各国においても少子化は進行しており、アジア大で事業戦略を考える場合、いまから長期的な人材確保・育成のプログラムを策定しておくことが求められる。
- (2) 企業が外国人の一層の活用を考える際、雇用管理、人事諸制度などのシステム改革が不可避である。日本企業において外国人を働きにくくしている阻害要因を取り除くことは、日本人社員にとっても望まれることである。むしろ、多様性によって組織の一体感が欠如したり、コミュニケーション・ギャップが発生する、あるいは意思決定に要する労力と時間が増大するといったこともあろうが、その一方で、多様性は異文化シナジーというべきプラスの効果を組織にもたらす。
- (3) 企業活動のグローバル化が深化したいまこそ、企業は異なる文化を超える視点を持ち、積極的に外国人の活用を考えていくことが必要であろう。先進企業の経験を広く社会に還元し、

実際に問題解決につなげるとともに、企業が地域における外国人支援の活動に資金提供を行うなど、多様な役割を果たすことが必要である。

アジアからの留学生や日系三世など、日本での成功を夢見ている若者たちを当面の対象としつつ、地域において、彼らが日本語を習得し、また日本の企業行動や社会慣行などを理解し、柔軟に対応できる能力を身につけさせることは、極めて重要な課題となろう。

地域ごとに特長のあるプログラムをつくりあげ、具体的に運用していくことが必要であり、地元の大学、地方自治体、経済団体、NPO・NGOの連携が強く求められる。

以上

提言「人口減少に対応した経済社会のあり方」【概要】

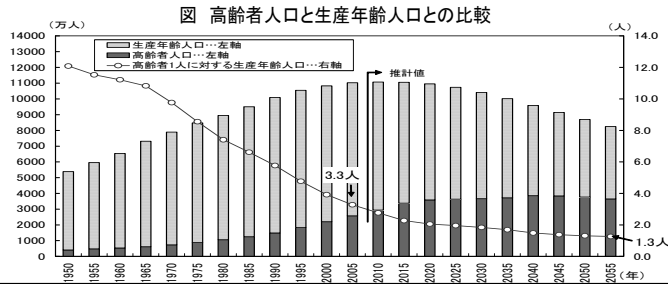
2008年10月14日 (社)日本経済団体連合会

1. はじめに

人口減少社会の到来により、経済活力減退や社会保障制度の持続可能性低下等、国民の不安感が増大している。このような中、中長期的な経済活力の維持と豊かな国民生活の実現に向けて、人口減少に対する正面からの取り組み等、今後50年程度を視野に入れ、今から着手すべき事項を提言

2. わが国の人口の展望

- (1) 総人口の減少
 - ・今後50年で総人口は30%近く減少し8993万人へ
- (2) 働き手の大幅な減少と地域偏在化
 - ・生産年齢人口は4595万人と現在のほぼ半分の水準
 - ・都市部より地方で人口流出・減少が加速
- (3) さらに高齢社会への移行
 - ・2055年には高齢者1人に対し支え手は1.3人
- (4) わが国における外国人人口の推移
 - ・ドイツ、英国等の先進諸国に比べて低水準
 - ・高度人材の国際的な獲得競争に劣後するおそれ



3. 人口減少が経済・社会に及ぼす影響

(1) 経済成長への影響

- ① 労働力人口の減少
- ② 貯蓄率低下による資本ストック蓄積鈍化
- ③ 消費・住宅投資等の内需縮小

(2) 財政・年金制度の持続可能性の喪失

- ① 財政・年金制度の一人当たり負担が増大
- ② 人口減少下での制度維持は著しく困難

(3) 経済社会システムの脆弱化

医療、介護、教育、治安・防災等の経済社会システムは人手不足により機能が脆弱化

- ① 人口減少の影響は時間の経過とともに深刻度が増大
- ② 若者世代が将来に希望を失えば、人口が海外流出し、人口減少が加速するおそれ
- ③ 人口減少に対する正面からの取り組みに直ちに着手することが必要

4. 中長期的な経済社会の活力維持に向けた方策

(1) 成長力の強化

- ① 研究開発活動の促進
- ② イノベーションを担う人材の育成と招聘
- ③ 世界の成長力の取り込み(各国とのEPA/FTAの締結促進)
- ④ 地域活性化と道州制の導入

(2) 未来世代の育成

- ① 少子化対策への真剣な取り組み
 - ・保育サービスの拡充、地域の子育て支援強化
 - ・税制抜本改革による子育て減税、安定財源の確保
 - ・仕事と生活の調和や多様かつ柔軟な働き方の推進
- ② 教育の再生、とりわけ初・中等教育の機能回復

(3) 経済社会システムの維持に必要な人材の活用・確保

- ① 女性の社会進出等の促進
 - 潜在的な労働力(女性、若年、高齢者等)の顕在化。とりわけ女性の就労継続と再雇用のための環境整備
- ② 国際的な人材獲得競争と日本型移民政策の検討
 - 全世界的な人材獲得競争激化の中で、わが国も定住化を前提とした外国人材の積極的受け入れのための法整備ならびに担当大臣の設置等政府の体制整備が待ったなしの課題
 - (a) 高度人材の積極的受入れ、(b) 将来の高度人材となる留学生の受入れ拡大と就業支援、(c) 一定の資格・技能を有する人材の受入れ(経済連携協定の枠組みにとどまらない看護師・介護士の受入れ、外国人研修・技能実習制度の見直し)
- ③ 受け入れた外国人材の定着の推進
 - (a) 地域・政府・企業の連携による社会統合政策の推進
 - 日本語教育強化、社会保障制度の改善・適用、就労環境整備、法的地位の安定化、各種行政サービスの向上、不法滞在への対応強化等
 - (b) 中長期的な受入れ規模
 - 持続的成長、経済社会システム維持のためには、年間で相当の規模の受入れが必要となる。国民的なコンセンサス形成に向けた議論の早期開始が不可欠

5. おわりに

人口減少の影響を受ける将来世代のために、現在世代の意志と決断で人口減少問題の克服を図ることが必要

以上

Global Competition and Employment of Foreigners

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1. “De Facto Economic Integration” in Asia

- (1) It is pointed out that in comparison to Europe, where economic integration continues to expand following the formation of the European Union (EU), aspects of economic integration in Asia are lagging significantly behind. However, if we take a close look at the division of labor structure of the global-scale companies in Asia, we see that de facto economic integration is already progressing at a considerably advanced level.
- (2) The movement of goods, money, services, information and people is vital to the Asian region. In the case of Japan, students, trainees and on-the-job interns from China are growing in number, and as the locations in Asia where Japanese companies are entering the market continue to diversify, more and more trainees and intra-company transferees, etc., are coming from the local affiliates to Japan, resulting in an ever growing number of foreigners engaged in work and training in this country. These people are not merely workers in an office or factory, they are prospective technicians who seek to acquire the skills in which Japan excels, and nascent specialists and engineers who will manage production lines, personnel and labor issues, general affairs and IT systems, etc.

2. China as Partner and Rival

- (1) China is an extremely attractive market, from whichever perspective you view it, be it in terms of market scale, speed of market growth, or expansion of purchasing power. China is therefore becoming the largest customer for Japanese products. China is also rich in human resources and in an economically integrated Asia it has a role to play as a supplier of human resources.
- (2) Today China has a clear growth strategy and is motoring along the route to becoming a major economic power and a nation based on science and technology. In that sense it could pose a threat to Japan. China could quickly become adept in the production of industrial products and therefore emerge as a major industrial power. Unless Japan concentrates its efforts still further on the development and production of high value-added products, it risks being consumed by the large Chinese “mountain.”

3. From Cost Competition to Added-value Competition – New Developments Surrounding Employment

- (1) In China, massive volumes of labor power have enabled companies to engage in production of various industrial products at low cost. In response, production in Japan initially also aimed to cut costs, by utilizing foreign workers of Japanese extraction and others, and moving towards an employment structure that makes greater use of part-time and temporary staff among Japanese employees.
- (2) At the same time, those global Japanese companies that have established production bases in the Asian region, including in China, have sought to compartmentalize the work done in the home country and the overseas bases. In other words, in Japan, work is being specialized towards research and development and design, and production of relatively high value-added products. In this production environment, employment is shifting away from the use of foreigners of Japanese extraction, who until now have been employed on a subcontracting or dispatch basis, towards the direct employment of Japanese nationals. This method obviates the need for cost competition with China, with corporate strategies focusing on raising corporate value through the development and production of new and advanced products, with which it is possible to secure a high rate of profitability.
- (3) In the case of Japan the manufacturing industry accounts for less than 20% of the workforce, which demonstrates that productivity on the factory floor in manufacturing is the highest among all industries in Japan. The development of new products and improvement to production processes are defined as contributing to total factor productivity (TFP) in the potential growth rate, but in order for new products to be developed and production line improvements achieved, core human resources are essential. Such core human resources need not be exclusively Japanese nationals. If Japanese companies can create workplaces in which overseas students who have studied at Japanese universities and second generation (or third generation) persons of Japanese extraction who have received a public education in Japan can work effectively, this will result in Japan's potential growth rate being raised.

4. Increasingly Severe Employment Environment for Persons of Japanese Extraction

- (1) The number of foreigners employed is rapidly decreasing, particularly in high density urban areas. Even before the global economic downturn, temporary contracts were already being terminated, following the transfer of factories and plants to China, etc. In the case of persons of Japanese extraction living and working in high density urban areas, their desire to continue working in Japan remains strong. Reasons for this desire are the fact that Japan is a safe country, and that Japan also provides a good environment for

children's education, etc. Although the number of persons of Japanese extraction acquiring permanent resident status is growing, with the current economic downturn and worsening employment situation, we should focus our attention on how these external factors will impact on the work opportunities and lifestyles of persons of Japanese extraction. A number of local governments are anticipating that the current economic downturn will not be resolved over the short-term and are proposing the provision of assistance for people to return to their home countries, but it is necessary to scrutinize how such a policy could be reconciled with the concept of achieving a multi-cultural society that has been advanced to date.

- (2) With regard to children's education, parents' concerns are currently rising. For example, the number of cases is increasing where a father of a family of Japanese extraction finds work in another city, but so as not to impact the children's education the father leaves the family behind and lives alone close to his workplace. However, there are an increasing number of cases in which the parents fail to fulfill their parental responsibilities, leaving children to run the risk of becoming delinquent, or becoming emotionally disturbed.
- (3) In recent years the number of foreigners living in high density urban areas as trainees or interns has been on an increasing trend. This is a system that makes it easy for companies to gain residence permission for foreigners to work in Japan for three years, and those who are acquainted with the system forecast that workplaces that to date have employed persons of Japanese extraction may turn to this system to employ foreigners as trainees.

Second generation persons of Japanese extraction include those who are already more than 10 years of age, and if the number of foreigners employed as trainees continues to increase, it is anticipated that these second generation persons will find their employment options are reduced when they reach working age. An important challenge from now will be to engage in efforts to boost the working skills of second generation persons and improve their job consciousness.

From this perspective, internships, company visits and field trips that companies are already implementing are beneficial. As part of school education the provision of work experience to both foreigners and Japanese alike will have a positive impact on prospects for securing skilled human resources in regional companies in the future.

5. Conclusion

- (1) For companies that play a central role in their communities the securing of human resources can be said to be a lifeline for remaining in business. Not only is the young

population in Japan decreasing, the birthrate is on a downward trend in other Asian countries, and therefore when considering a pan-Asian business strategy, from now on it will be necessary to formulate a long-term human resources procurement and development program.

- (2) For companies considering the greater utilization of foreign workers, it is essential to reform corporate systems, such as employment management and personnel systems. Eliminating barriers to employment for foreigners in Japanese companies is something that will work in favor of employees of Japanese nationality also. On the other hand, as diversity increases there is also the possibility that corporate organization could lose its uniformity, with communication gaps appearing, and the time and effort required for decision making increasing. However, diversity in the workplace can also be expected to bring about a positive effect in corporate organization, in terms of cross-cultural synergy.
- (3) In a world in which globalization of corporate activities continues to deepen, it will be important for companies to maintain a multi-cultural perspective and seek to actively utilize foreigners. The experiences of companies who are already advanced in such efforts should be disseminated to a broad range of other companies, demonstrating how they actually resolved issues, as well as providing information on what financial resources companies have provided for activities that assist foreigners in local communities. It is important for companies to fulfill a diversity of roles in this way.

A challenge of the utmost importance is to concentrate for the time being on overseas students from Asia and third generation persons of Japanese extraction, etc., and other young people who dream of being successful in Japan, providing them with the means to acquire Japanese language skills, enabling them to understand Japanese companies' activities and corporate customs, and providing them with the skills to work flexibly in a Japanese corporate environment.

Programs need to be created that focus on the particular characteristics of a certain region or community, and put into operation. For this to happen, the cooperation and coordination among local universities, local governments, economic organizations, non-profit organizations (NPO) and non-governmental organizations (NGO) is absolutely essential.

An Economy and Society That Responds to the Challenges of a Declining Population

October 14, 2008

Nippon Keidanren
(Japan Business Federation)

《Executive Summary》

On October 14, 2008, Nippon Keidanren announced its policy proposal “An Economy and Society That Responds to the Challenges of a Declining Population.”

Based on a time horizon of 50 years or so, this proposal brings together measures that Japan should begin implementing immediately so that citizens can maintain vigorous and prosperous lives despite the advent of serious population declines. In developing this proposal, field surveys were undertaken in four European nations, including Germany and the United Kingdom, and with respect to the European Union.

Japan’s total population is expected to contract by 30 percent in the next 50 years, and the working-age population will shrink to about one-half its current size. As a consequence, it will be necessary for just 1.3 persons of working age to support one person who is 65 years or older. Such a rapid population decline will slow the economic growth rate, make it difficult to sustain government finances and the public pension system, and also make it hard to maintain an economic and social system requiring manpower in such areas as health care and long-term care. Based on certain assumptions, a shortage of about 1.8 million workers is estimated for the health care and long-term care fields.

As the population decrease becomes more acute, the acceptance of foreign workers and the promotion of their permanent residency should be considered seriously if Japan is to strengthen its competitiveness and stably maintain the functions of its economic and social system. With global competition increasing over labor, it will be essential to (1) actively accept highly skilled labor, (2) expand the acceptance of foreign students and promote their employment, and (3) accept foreign workers with a certain level of qualifications or skills.

To achieve these ends, an urgent issue is to consider seriously comprehensive Japanese own immigration policies, such as the enactment of legislation and the development of administrative systems, including the establishment of a responsible minister.

Moreover, with the view of maintaining a vigorous economy and society over the long term, measures that should be implemented immediately are:

- Strengthening of growth capacity, such as through the promotion of research and

development and through human resources development

- Fostering of future generations, such as through the promotion of bold measures that address the challenges of a declining birth rate

《Outline of the Proposal》

With the advent of a society with a declining population, Japanese citizens feel more uncertainties toward the future with regard to the waning of economic vitality and the diminishing prospects for maintaining the social insurance system, among other issues. Nippon Keidanren therefore proposes measures based on a time horizon of 50 or so years that Japan should begin implementing immediately, with the view of maintaining economic vitality in the long term and of enabling citizens to realize prosperous lives.

1. The Effect of a Declining Population on the Economy and Society, and the Need for Suitable Responses

a) In the next 50 years, Japan’s total population will decrease from 127.77 million (2005) to 89.93 million (a decline of 30 percent), and the working-age population will contract sharply from 84.42 million (2005) to 45.95 million (a decline of 46 percent). This means that 50 years hence just 1.3 working-age persons will be supporting one elderly person (Chart 1). Furthermore, the distribution of the population by region will grow more uneven.

Also, the percentage share of foreigners in Japan’s total population is even low compared to European and other developed countries (Chart 2).

Moreover, Japan has been falling far behind in the international competition over securing highly skilled labor.

Chart 1: Comparison of the Elderly Population and the Working-Age Population

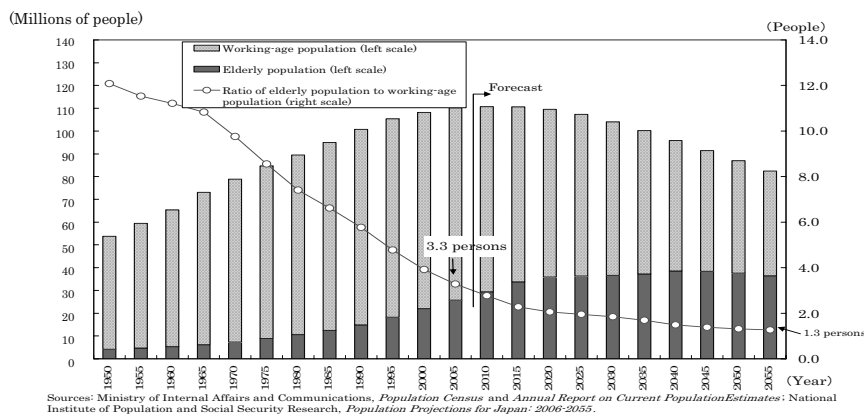
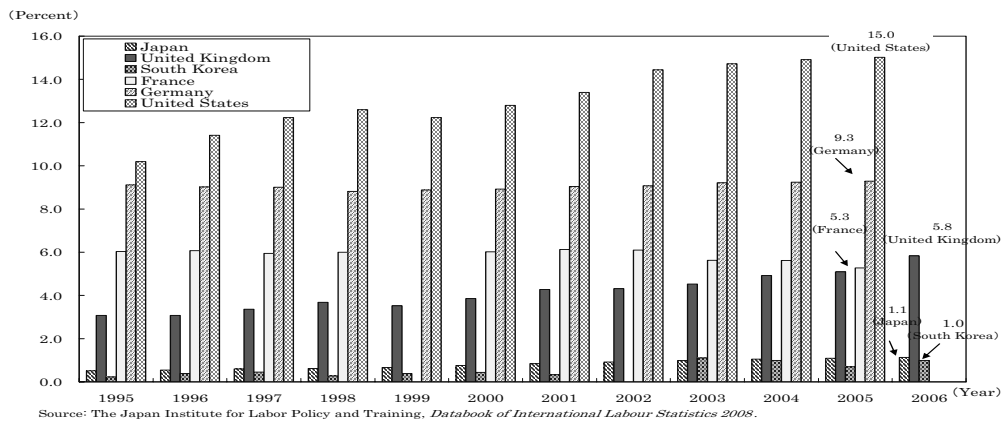
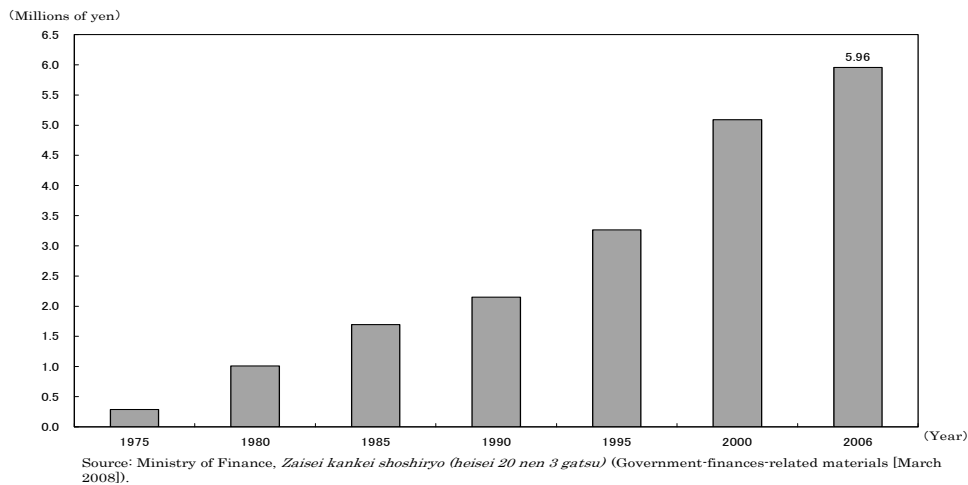


Chart 2: Percentage Share of Foreign Workers in the Labor Force
(International Comparison)



b) Given these circumstances, it should be difficult to keep economic growth, the sustainability of government finances and the public pension (Chart 3), and the economic and social system requiring manpower in such areas as health care and long-term care.

Chart 3: Per Capita Share of National Debt (Sum of National and Local Governments)



c) The effects of a declining population will grow more serious as time goes by. Also, should the younger generation lose hope in the future, the population will flow overseas in the context of globalization, led by highly skilled workers, which will risk accelerating the population decline. d) To overcome these problems associated with a decreasing population, it will be essential to clarify a path toward new growth and to promptly begin implementing measures with immediate effect together with measures requiring a relatively longer time span.

2. Policies for Maintaining the Vitality of the Economy and Society in the Long Term

a) Strengthening the Capacity for Growth

Build a powerful economy that can continue growing despite a contracting labor force.

- (1) Promotion of research and development activities (expansion of R&D tax break, steady implementation of the 3rd Science and Technology Basic Plan, etc.)
- (2) Fostering or inviting scientists who support innovation
- (3) Promoting economic partnership agreements (EPAs) and free trade agreements (FTAs)
- (4) Revitalizing local communities and reorganizing the current local governments (switch-over to “doshu-sei”, a kind of Federation)

b) Fostering of the Next Generation

- (1) Serious efforts to develop measures that address the challenges of a declining birth rate
 - Expansion of childcare services of local communities
 - Childcare tax breaks and the securing of stable revenues through comprehensive tax reform(cf. “Proposal for Comprehensive Reform of Taxation, Fiscal Policy, and Social Security Programs(Oct.2,2008) ”
 - Promotion of work-life balance and varied and flexible ways of working

(2) Education reform

- Restoration of the functions of primary and secondary education

c) Maximum Use of the Domestic Labor Force and Acceptance of Foreigners with Abilities

(1) Promotion of the social advance of women, etc.

- Development of an environment that encourages the ongoing employment and reemployment of women
- Promotion of the employment of young people as well as motivated and capable elder people

(2) Global competition over labor force and consideration of Japanese own immigration policies

- To promote the active acceptance of foreign workers that assume their permanent residency, there is an urgent need to consider seriously comprehensive Japanese own immigration policies, including the enactment of legislation and the development of administrative systems, such as the establishment of a responsible minister.
- Deregulation and Policy Reforms for Active Acceptance for:
 - (a) highly skilled labor
 - (b) foreign students and promotion of their employment in Japan
 - (c) foreign workers with a certain level of qualifications or skills(flexible acceptance beyond the frameworks of EPAs, revision of the Industrial Training and Technical Internship Program, etc.)

(3) Promoting the retention of foreign workers in Japan

The role of social integration policies will be important in building an environment where Japanese and foreigners can understand each

other's cultures and customs, and live without difficulties in local communities.

- Active responses by local communities, government, and companies(strengthened Japanese language education, improvement and application of the social insurance, development of the employment environment, a secure legal standing, improvement of social services, prevention of illegal residency, etc.)
- Extent of the acceptance of foreign workers in the long term A government agency estimates that the number of foreigners in Japan will be 3.6 million over the next 50 years. At that time, workers in the field of health care and long-term care will be short by 1.8 million under certain assumptions.
- Early start of discussion for forming a national consensus