



**Ulandssekretariatet**  
LO/FTF Council

Danish Trade Union  
Council for International  
Development Cooperation

# Paraguay

## Labour Market Profile

### 2014

*This Labour Market Profile is a yearly updated report that provides a broad overview of the labour market's situation and development. The report is based on the latest data available and following trends. Each section has also accesses to the sources' links that can be used to go more in-depth on selected themes. This is a revised version.*



# Paraguay – Labour Market Profile 2014

## Executive Summary

Paraguay has a significant progress in the macroeconomic development, but with a high volatility in growth. In particular the agricultural sector has grown, but due to increased mechanisation, few agricultural jobs have been created. Due to the substantial hydroelectric power, Paraguay is on its way to becoming a big producer of power.

The nation has one of the highest income inequalities in the world, and land distribution is highly unequal with 1.6% of farmers owning 79% of all land, which continuous to be a source of social unrest.

The new president, Horacio Cartes, a Paraguayan tobacco magnate and represents the Colorado party, was installed in August 2013. Paraguay was fully re-integrated into MERCOSUR in January 2014 after being suspended of the union in 2012 due to diplomatic rifts. The government launched a proposal of a policy of Public-Private Alliance to benefit the economic sectors. Trade unions participation was not taken into consideration.

In recent years there has been progress on free access to primary health care and basic education, and the expansion of conditional cash transfer programs with impact on the most vulnerable populations. The social protection system's coverage remains insufficient and fragmented. So far, eight out of every ten citizens lack old-age protection and seven out of every ten workers do not have health insurance, which is some of the lowest coverage rates in South America.

An Office of Indigenous Workers was established in the Ministry of Justice and Labor (MJT) in 2013, which focuses on policies of worker rights of indigenous people and controlling established institutions that operate with indigenous workers.

The Youth Employment Act (*Primer Empleo Juvenil*) was approved in May 2013, which obligates firms that at least 5% of employees are youth and half shall be women. Trade unions have criticized the law in terms

of introducing flexibility on the labour market, which in practice reduces decent work conditions.

The trade unionism in Paraguay is in a transformation. There are improvements in social dialogue with the government and with new generations of leadership in the organizations. Also a joint strike in March 2013 among all unions for the first time in 18 years demonstrated improved coordination. The trade union density to waged workers is estimated at 20%.

Informal employment makes up 65% of total employment in the non-agricultural sector. Informal employment is decreasing, though, and getting closer to the region's average. Labor market inefficiencies together with efforts to increase female labor participation still need to be addressed to reduce informality.

Many trade union rights violations were registered in the period 2013-2014 (June) and the country has four active cases in the International Labour Organization's (ILO) complaints procedure.

The national minimum wage was raised of 10% in March 2014. It was recently estimated that the percentage of workers who received the minimum wage increased from 65% in 2012 to 72% during the year 2013. The ease of doing business is not improving, except paying taxes. And, unemployment in Paraguay stands at 6.3%, and youth unemployment at 13%.

Paraguay was one of the first countries that ratified the International Labour Organization's (ILO) Convention 189 on domestic workers in May 2013. A draft law that includes domestic workers covered by social security is in process, but has continuously been deferred. It is estimated that just over 10% of domestic workers are registered by the *Instituto de Previsión Social* (IPS). There is a surge of trade union organization of domestic workers.

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## Trade Unions

Trade unions in Paraguay	
Number of enterprise trade unions (2008) <sup>1</sup>	2,377
Dues (standard)	N/A
Members of trade unions (2010) <sup>2</sup>	317,000
Trade union members share of labour force	9.8 %
Trade union members to waged workers	20 %
Female member share of trade unions (CUT-A)	18 %
Members of affiliated trade unions from the informal economy (CUT-A)	5,060
Number of CBAs	N/A
Workers covered by CBAs	N/A
Share of workers covered by CBA	4 %
Labour force (2013)	3,231,000

The trade union movement of Paraguay is a complex fabric of a majority of small enterprise unions, either being affiliated to the country's few confederations or working as independent units. Many of the unions have close relations to political parties. Some public institutions count with more than 20 unions, and the existence of several competing unions in private enterprises is not uncommon. Farmers are not members of trade union, but mostly members of *campesino* (farm worker) movements.

Private-sector worker organizations operate independent of the government and political parties. Nonetheless, workers have not established unions in the majority of private enterprises. One reason is that harassments, threats, and anti-union campaigns are well established means to avoid union activities in the labour market.

Collective bargaining agreements (CBAs) cover around 4% of the labour force, which is low in contrast to neighbouring countries: Uruguay, Argentina and Brazil, where between 60 and 90% of workers are covered by such agreements.<sup>3</sup> The Authentic Unitary Workers' Central published a Statement in May 2014 that expressed improvements of social dialogue, but demanded the government to comply with the agreements.

The Labour Code prohibits anti-union discrimination but does not require reinstatement of workers fired for union activity. It is also noteworthy that there are several restrictions on these rights, e.g. the law requires that industrial unions have a minimum of 300

members to register, a requirement considered excessive by international standards.<sup>4</sup>

Two national union confederations, CNT and CUT-A, are affiliated to the Trade Union Confederation of the Americas (TUCA) and ITUC today. Despite the difficult political environment at present, the two national umbrella organisations continue to work with the Decent Work Agenda and are following the policies of TUCA/ITUC. There have also been improvements in organizing joint strikes among the confederations.<sup>5</sup>

### National Workers' Central (CNT)<sup>6</sup>

The largest trade union centre in Paraguay is CNT (*Central Nacional de Trabajadores*). CNT has around 80,000 members, 11 trade union federations affiliated as well as two other organizations.

Its primary mission is to improve the working and living conditions of workers in Paraguay, to support organizing of workers power and to build a new self-managed society. CNT was founded in 1963 as the Christian Workers Central (CCT) and changed its name in 1978. Furthermore CNT is descended from the organizations Paraguay Trade Union Movement (MSP), Christian Agrarian League (LAC) and the National Coordination of Workers, Urban Organisations and Peasants.

CNT also runs the Paraguayan Centre for Social Studies (CEPES), which runs training courses for affiliated members.

### The Authentic Unitary Workers' Central (CUT-A)<sup>7</sup>

The CUT-A (*Central Unitaria de Trabajadores - Auténtica*) is a trade union organization established in the year 2000. CUT-A has 70 affiliated trade unions and federations, with an estimated member sum at 45,000. Its affiliation covers the public and the private sector, as well as the informal economy. CUT-A has national coverage, with organizational work in the 17 provinces of the country.

Its objectives are the training, organization, and representation of the trade union leadership of the workers from the rural and urban, public and private sectors, the formal sector and the informal economy, under the commitment of unconditional defence of the workers, based on the principles of class solidarity and equality.

<b>Trade Unions in Paraguay<sup>8</sup></b>							
Members, Dues, Collective Bargaining Agreements (CBA) and Occupational Safety and Health committees							
<b>Trade Union / Trade Union Centre</b>	<b>National affiliation</b>	<b>Total Members (2012)</b>	<b>Female Members</b>	<b>Dues</b>	<b>Number of CBAs</b>	<b>Workers covered by CBAs</b>	<b>Number of OSH committees at workplaces</b>
<b>CNT</b> Central Nacional de Trabajadores		80,000	-	-	-	-	-
<b>CUT-A</b> Central Unitaria de Trabajadores Auténtica		45,000	18%	-	-	-	-
<b>CUT</b> Central Unitaria de Trabajadores		-	-	-	-	-	-
<b>CGT</b> Central General de Trabajadores		-	-	-	-	-	-
<b>CESITEP</b> Central Sindical de Trabajadores del Paraguay		-	-	-	-	-	-
<b>CPT</b> Confederación Paraguaya de Trabajadores		7,672	-	-	-	-	-
<b>APEJUIPS</b> Asociación de Jubilados y Pensionados del IPS (Pensioners)	CNT	-	-	-	-	-	-
<b>FETRAT</b> Federación de Trabajadores del Transporte (Transport)	CNT	-	-	-	-	-	-
<b>ONAC</b> Organización Nacional Campesina (Farmers)	CNT	-	-	-	-	-	-
<b>SINOMA</b> Sindicato Nacional de Obreros Metalúrgico y Afines (Metal workers and allied industries)	CNT	-	-	-	-	-	-
<b>SINTAA</b> Sindicato Nacional de - Trabajadores de la Alimentación y Afines (- Food Processing)	CNT	-	-	-	-	-	-
<b>SINTRAICMA</b> Sindicato Nacional de Trabajadores de la Industria de la Construcción, Madera y Afines (Construction, Wood and Allied Industries)	CNT	-	-	-	-	-	-
<b>SOIVA</b> Sindicato Nacional de Trabajadores de la Industria Textil y Afines (Textile and Allied industries)	CNT	-	-	-	-	-	-
<b>SINTECOSS</b> Sindicato Nacional de Trabajadores y Empleados de Comercio Oficinas y Similares (Commerce and related)	CNT	-	-	-	-	-	-
<b>UNE.SN</b> Unión Nacional de Educadores. Sindicato Nacional (Teachers)	CNT	-	-	-	-	-	-
<b>UNAPESCA</b> Unión Nacional de Pescadores Comerciales y Afines (Fishermen and Allied)	CNT	-	-	-	-	-	-
<b>UNTE/SN</b> Unión Nacional de Trabajadores del Estado Sindicato Nacional (Civil Servants)	CNT	-	-	-	-	-	-
<b>CNM</b> Coordinadora Nacional de Mujeres Trabajadoras	CNT	-	-	-	-	-	-
<b>OJT</b> Organización de Jóvenes Trabajadores	CNT	-	-	-	-	-	-
<b>SINATT</b> Sindicato Nacional de Trabajadores del Transporte	-	-	-	-	-	-	-

## Employers' Organisations

### Federation of Production, Industry and Trade (FEPRINCO)

No information available.

## Central Tripartite Structures

### Mediation and Arbitration

The Mediation and Arbitration Center (*Centro de Arbitraje y Mediación Paraguay, CAMP*) was established in 1996 and operates with mediation services by 35 professionals and a group of mediators by 23 professionals in different sectors.<sup>9</sup>

### Consejo Nacional de Salarios Mínimos<sup>10</sup>

The National Minimum Wage Council sets minimum wages. It is chaired by the Director of the labour administration, and has three representatives each from the state, employers and workers, appointed by their agencies.

### Other bi/tripartite organs<sup>11</sup>

- Tri-partite Roundtable on Youth Work
- Tri-partite Roundtable Against all Forms of Discrimination
- Professional Training Roundtable (SINAFOCAL)
- National Science and Technology Council (CONACYT)
- Tripartite Commission on Equality of opportunities (CTIO)
- National Commission on Fundamental Labour Rights and Prevention of the Forced work.

Previous bi/tripartite organs have had limited results. The new government from 2013 launched a proposal of a policy of Public-Private Alliance to benefit the economic sectors. It was noted that trade unions participation was not taken into consideration.<sup>12</sup>

## National Labour Legislation

### Constitution<sup>13</sup>

The constitution from 1992 was last amended in 2012. It establishes a set of labour rights such as full employment, non-discrimination, maternity protection, maximum work time of 8 hours per day and 40 hours per week, social security, freedom of association and collective bargaining and the right to strike and lock-out. It also gives priority to ensure normal development of working children.

### Labour Act<sup>14</sup>

The Labour Act of 1995 regulates employment contracts, working conditions, collective labour relations and social security.

### Micro, Small and Medium Enterprises Act

Paraguay approved the act (4457/12) in 2012 for enterprises with less than 30 employees. The law allows the enterprises to pay below the minimum wage and fire workers without compensation.<sup>15</sup>

### Youth Employment Act<sup>16</sup>

This act of 2013 (4951) establish the norms of different modalities to strengthen capacities and training, and make the conditions to decrease the existing inequality that affect youth to access and stay permanently on the labour market.

*The labour code is the most important labour legislation. Several other legislations exist, which regulates and sets standards and restrictions for the labour market.*<sup>17</sup>

## ILO Conventions

Ratified ILO Conventions <sup>18</sup>		
Subject and/or right	Convention	Ratification date
<b>Fundamental Conventions</b>		
<b>Freedom of association and collective bargaining</b>	C087 - Freedom of Association and Protection of the Right to Organise, 1948	1962
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1966
<b>Elimination of all forms of forced labour</b>	C029 - Forced Labour Convention, 1930	1967
	C105 - Abolition of Forced Labour Convention, 1957	1968
<b>Effective abolition of child labour</b>	C138 - Minimum Age Convention, 1973	2004
	C182 - Worst Forms of Child Labour Convention, 1999	2001
<b>Elimination of discrimination in employment</b>	C100 - Equal Remuneration Convention, 1951	1964
	C111 - Discrimination (Employment and Occupation) Convention, 1958	1967
<b>Governance Conventions</b>		
<b>Labour inspection</b>	C081 - Labour Inspection Convention, 1947	1967
	C129 - Labour Inspection (Agriculture) Convention, 1969	Not ratified
<b>Employment policy</b>	C122 - Employment Policy Convention, 1964	1969
<b>Tripartism</b>	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	Not ratified
<b>Up-to-date Conventions</b>		
<b>Working time</b>	C014 - Weekly Rest (Industry) Convention, 1921	1966
	C106 - Weekly Rest (Commerce and Offices) Convention, 1957	1966
<b>Elimination of child labour and protection of children and young persons</b>	C077 - Medical Examination of Young Persons (Industry) Convention, 1946	1966
	C078 - Medical Examination of Young Persons (Non-Industrial Occupations) Convention, 1946	1966
	C124 - Medical Examination of Young Persons (Underground Work) Convention, 1965	1967
<b>Wages</b>	C095 - Protection of Wages Convention, 1949	1966
<b>Occupational Safety and Health</b>	C115 - Radiation Protection Convention, 1960	1967
	C120 - Hygiene (Commerce and Offices) Convention, 1964	1967
<b>Equality of opportunity and treatment</b>	C156 - Workers with Family Responsibilities Convention, 1981	2007
	C159 - Vocational Rehabilitation and Employment (Disabled Persons) Convention, 1983	1991
<b>Indigenous and tribal peoples</b>	C169 - Indigenous and Tribal Peoples Convention, 1989	1993
<b>Specific categories of workers</b>	C189 - Domestic Workers Convention, 2011	2013
<p>Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work.</p> <p>Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promotes a well-regulated and well-functioning labour market.</p> <p>In addition, there are 71 conventions, which ILO considers "up-to-date" and actively promotes.</p>		

## Trade Union Rights Violations

The International Trade Union Confederation (ITUC) registered a series of trade union rights violations in 2013-2014 (November).<sup>19</sup> There were several anti-union discrimination and refusal to bargain in good faith which was trade union discrimination: i) The Granja Maehara S.A. dismissed workers for creating a union. Subsequently, the unionists were arrested by police for protesting in front of the company's facilities. ii) The meat company Industria Paraguaya Frigorífica S.A. (IPFSA) dismissed union leaders and members and has refused to negotiate a collective agreement. iii) The security company Prosegur dismissed 325 workers after the creation of a union and refused to bargain with the union. iv) The company Grupo La Victoria dismissed workers and union leaders after the creation of a union. v) The Banco Regional SAECA refused to sign a collective agreement with the union.

ITUC noted intervention in collective agreements. It was estimated that more than 90% of collective agreements in the public sector are not recognized due to arbitrary interference by the Secretary for the Civil Service (*Secretaría de la Función Pública*).

There occurred examples of acts of interference in strike action that undermined the recourse to strike actions when the wire company Alambra SA hired staff in August 2013 to replace workers on strike in the city of Capiatá. Labour inspectors have confirmed that substitutes were used by the company, but took no further action.

ITUC also reported obstacles to the right to strike in practice due to limitations or ban on strikes when an administrative act by the Ministry of Labour suspended the right to strike by unions in the Ministry of Finance and in the Judiciary. The Ministry of Labour does not have this authority.

In August 2014 several trade union leaders were injured by police during a demonstration by trade union leaders from the education sector. According to ITUC, the police has incompetence, lack of professionalism and repressive culture stand as a reminder that the repressive apparatus built up during the dictatorship era in Paraguay remains present.<sup>20</sup>

The U.S. Annual Country Report on Human Rights Practices 2013<sup>21</sup> also listed anti-union discrimination occurrences and union organizers experienced harassment and dismissal for union activities. Some workers chose not to protest due to fear of reprisal or expectations of government inaction. In July 2013, a transportation company dismissed eight employees after they alleged the company forced them to work long hours and did not provide required social security and overtime payments. Sixty employees began a strike in August 2013, some crucifying themselves and others initiating a hunger strike. Public pressure forced the Labor Vice Ministry to increase inspections of the company and fine the company for noncompliance. The strike ended in September after an agreement that reinstated seven of eight dismissed employees.

CUT-A has made reference to the entrance of the new government in August 2013, which provoked massive sacking of workers from the public administration, based on political and ideological persecution.<sup>22</sup>

ILO's Committee of Freedom of Association is processing five active cases: i) one filed in 2013 by CNT, CUT-A, and TUCACOB; ii) UNI Global Union and SITEPROPASA filed a case in 2012 on alleged anti-union dismissals and acts of persecution against striking workers as well as enterprise refusal to negotiate a collective agreement on working conditions; iii) CUT, STEIBI, SICONAP/S and SITRAIBI filed a case in 2011 regarding non-compliance with a collective agreement, the subsequent negotiation of a collective agreement with minority unions and reprisals following a strike; iv) in 2008 SOECAPASA, CGT, CESITEP and CPT filed a case alleging anti-union dismissals and transfers, as well as acts of violence against one woman member, and v) complaint date in August 2014 by National Union of Teachers, National Union (UNE-SN) but the case is confidential.

ILO Complaints Procedure <sup>23</sup> Freedom of Association cases (2014)	
Active	5
Follow-up	1
Closed	42

## Working Conditions

Wages and earnings Monthly average, median and legal minimum wages			
	Source	Current Guarani	US\$
Average wage (2008)	Global Wage Database <sup>24</sup>	1.4 million	338
Minimum wage (2014)	Decreto N° 1324 <sup>25</sup>	1.8 million	407
Minimum wage for a 19-year old worker or an apprentice (2013)	Doing Business <sup>26</sup>	955,713	213
Ratio minimum wage to value added per worker (2013)			0.48
Growth of real minimum wage (2000-2011)	Global Wage Database <sup>27</sup>		8.2 %
Growth of real average wage (2000-2008)			- 20 %
Growth of real average wage (2000-2011)	ECLAC <sup>28</sup>		8.5%
<i>Ratio of minimum wage to value added per worker denotes the minimum wage share of labour productivity. Reported as ratio of minimum wage to value added per worker in the Doing Business Report.<sup>29</sup></i>			

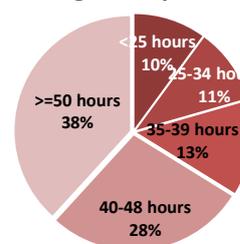
The national minimum wage was raised of 10% in March 2014, reaching PYG 1.8 million (US\$407) per month. According to the *Dirección General de Estadísticas, Encuestas y Censos* (DGEEC) surveys, the per capita monthly income was approximately PYG 970,000 (US\$216) and has estimated that the percentage of workers who received the minimum wage increased from 65% in 2012 to 72% during the year 2013.

The latest measure of the average wage was PYG 1.4 million (US\$324) in 2008. According to ILO data based on the permanent household survey (EPH), the real average wage has fallen 20% from 2000 to 2008. Data from the United Nations Economic Commission for Latin America and the Caribbean (ECLAC) however suggests that the real average wage has increased by 8.5% from 2000-2011.

It is noteworthy that labour legislation setting domestic workers' pay at 40% of the minimum wage. If they are aged between 14 and 17 years, the law sets their pay at 60% of the minimum wage. Moreover, the minimum wage for poor workers is not a minimum

wage, but has been interpreted as a maximum wage.<sup>30</sup> It is also reflected in official statistics at 60% of the employed population earns less than the minimum wage.<sup>31</sup>

Working hours per week<sup>32</sup>



As can be seen from the graph above, most employed Paraguayans work more than 40 hours per week, and over a third work more than 50 hours per week.

According to the previously mentioned U.S. Annual Country Report, the labour inspections confirmed that 14% of inspected firms had failed to register all of their employees with the Ministry of Justice and Labor (MJT) and many did not have social security coverage. The inspections also revealed that 18% of the inspected workers were not paid a minimum wage or overtime. Fourteen percent of the workers worked more than eight hours per day or 48 hours per week, 17% lacked collective contracts, and 23% did not receive annual paid vacations or receive the annual bonus of one month's salary.<sup>33</sup> Trade unions have raised their concern of indigenes workers who often operate in modern slavery conditions, and labour inspectors have not sufficient staff and funding to stop this kind of circumstances.<sup>34</sup>

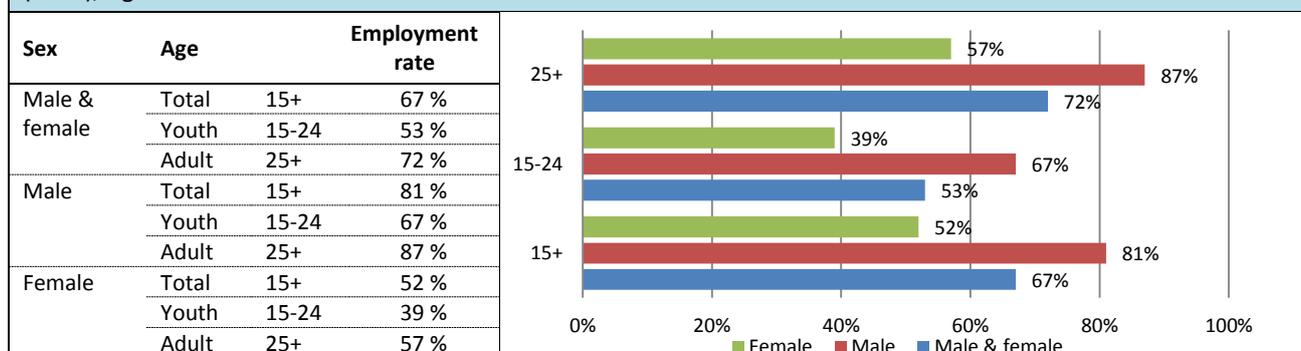
It has been registered that many employers violated provisions requiring overtime pay, particularly in the food, agricultural, and domestic services.

Only 43 labour inspectors is 1 per 73,350 workers in the labour force. The ILO recommends 1 inspector per 40,000 workers in less developed countries and 1 per 20,000 workers in transition economies.<sup>35</sup>

There are not updated information on recent workplace fatalities or industrial accidents.

## Workforce

### Employment rates<sup>36</sup> (2013), Age and Sex distribution



The total population in Paraguay is estimated as 6.7 million people in 2014, out of which 3.2 million cover the labour force.

Women have considerably lower employment rates than men, but the overall employment rate is higher than the average for the region, both for male, female and the total employment.

Paraguay has a middle class about the same level as the regional average, as 20% lived for US\$2-4 a day and 59% for US\$4-20 a day, compared to the average for Latin America and the Caribbean where 19% lived for US\$2-4 a day and 57% for US\$4-20 a day.

The latest data on working poverty from 2010 show a slightly double as high rate of working Paraguayans living for US\$1.25 a day in comparison with the Latin America and the Caribbean's average.

### Working Poor<sup>37</sup> Age 15+

	Share of workers in total employment	
	1.25 US\$ a day	2 US\$ a day
Paraguay (2001)	10 %	19 %
Paraguay (2010)	7.2 %	13 %
Latin America and the Caribbean (2010)	3.2 %	7.1 %
Latin America and the Caribbean (2013)	2.9 %	6.5 %

*Working poor measures employed people living for less than US\$1.25 and US\$2 a day, as proportion of total employment in that group.*

## Unemployment and underemployment

Unemployment in Paraguay stands at 6.3%, and youth unemployment at 13%. The unemployment and youth unemployment rate are both average for the region, since the unemployment and urban youth unemployment rate for Latin America and the Caribbean were 6.6% and 13.5%, respectively.

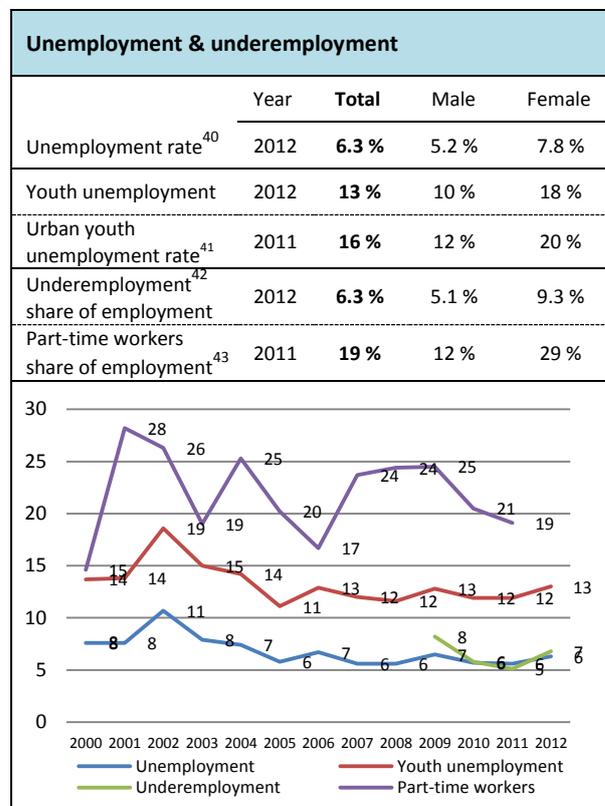
Indicators of hidden unemployment are rather low: 6.3% are underemployment, which indicate those who involuntarily work less than they desire out of total employment. Around 19% are part-time workers, voluntary or not; however, it entails much higher rate among women at 30% while men cover 12%.

Interpretation of the open unemployment and employment rates as indicators of a well-functioning labour market is problematic in developing countries. When unemployment is not an option where a person can survive, work of some sort has to be found, often casual and informal work. Unemployment should therefore be understood in relation to the strength of social safety nets, the prevalence of informal employment and how much of informal employment is underemployment due to few formal employment possibilities.<sup>38</sup>

Paraguay is a moderately industrialised country, though with a large share of informal employment. One out of four (27%) of the employed work in agriculture, 53% are in waged employment, and 65% of non-agricultural employment are informal.<sup>39</sup> Unemployment is therefore a good indicator of labour market dysfunctions in Paraguay, which is also reflected in the low underemployment rate.

Over the last decade there has been decreasing steady tendencies for the unemployment indicators, except part-time workers, which has been more fluctuated. Paraguay's employment also appears to have been

relatively unscathed by the global financial recession in 2007-2009, even though Paraguay entered recession with a negative growth rate in 2009.



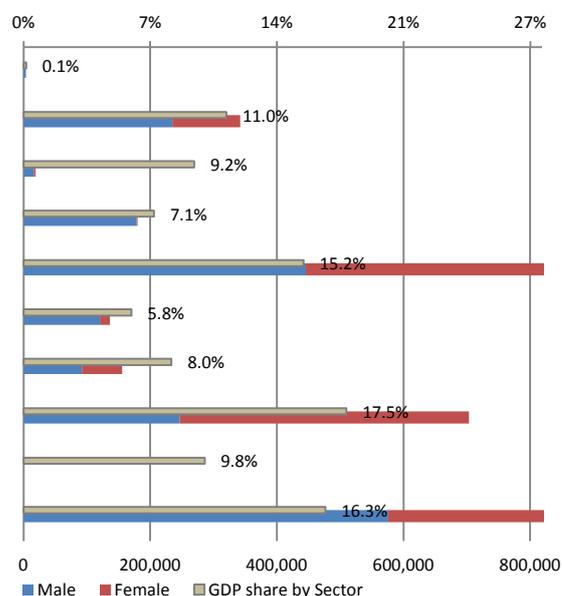
Overall, the underemployment with low wages and excessive working hours is increasing along with the growth of micro-enterprises in the informal economy. It indicates that the MJT has lacked resources and capacity to regulate the labour market. In addition, the national employment policy has turned into programs that have worked isolated and with limited impact on the workforce.<sup>44</sup>

## Sectoral employment

### Employment (2012)<sup>45</sup> & GDP share (2012)<sup>46</sup>

#### Sector & Gender distribution

Sector	Male employment	Female employment	GDP share per sector
Mining and quarrying	3,856	0	0.1 %
Manufacturing	235,034	106,955	11.0 %
Electricity, gas and water	16,201	2,787	9.2 %
Construction	178,576	1,301	7.1 %
Trade, hotels and restaurants	445,572	282,107	15.2 %
Transport, storage and communications	120,627	15,543	5.8 %
Financing, insurance, real estate and business services	91,892	63,862	8.0 %
Community, social and personal services	246,311	457,100	17.5 %
Others	N/a	N/a	9.8 %
Agriculture	575,810	306,978	16.3 %

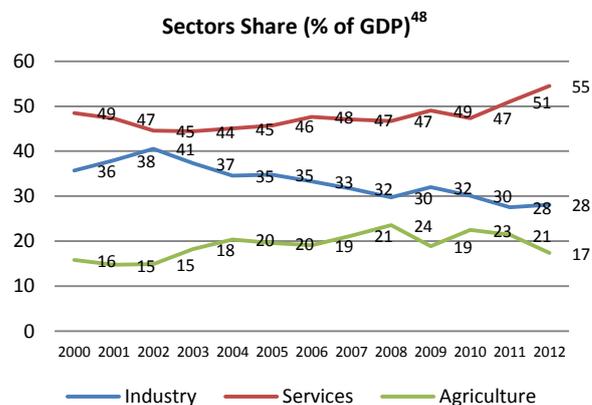


One out of four (27%) of the employed workers in the agricultural sector are largely concentrated of Paraguay's soy and meat export sector. The agricultural sector is often on a subsistence basis and very unequal, with about 1.6% owning 79% of all arable land, in a mechanised agricultural sector.<sup>47</sup> The agricultural sector has grown considerably in the last decade, mainly due to increased mechanisation. This has increased productivity, but produced few jobs. Agriculture's share of GDP peaked in 2010 of 23% but dived down at 17% in 2012. The number of workers in the agricultural sector has increased at 3% in the same period, which does not distinguish between self-employed and waged farm workers.

Instead the large employing sectors are: Trade, Hotels and Restaurants as well as Community & Personal Services. Apart from agriculture, these two sectors also employ most working women. Especially the

latter, where women tend to work in the health and education types of jobs.

The industry sector's GDP share has declined since 2002, reaching 28% in 2012. On the other hand, the service sector is growing from 44% of GDP in 2004 to 55% in 2012.



## Migration

With a remittance rate at 2.5% of GDP, Paraguay receives almost 3 times as much remittance as the Latin American and Caribbean's average. More migrate out of Paraguay than enter, i.e. the net migration rate from 2008-2012 is one out of every 808 inhabitant migrate.

While the most migrants in Latin America head for the United States, Paraguayans tend to migrate to neighbouring countries, with the top three destinations being Argentina, Brazil, and Spain.<sup>49</sup>

There was an increasing female component in Paraguayan emigration, and for small businesses, both in Paraguay and abroad, female participation had become important.<sup>50</sup>

## Informal Economy

Informal employment makes up 65% of total employment in the non-agricultural sector in Paraguay. The informal economy is much larger than the average for the Latin American and Caribbean region. However, employment in this sector is decreasing and getting closer to the region's average.

Another indication is the type of employment: Two types of employment, which are often informal, are own-account workers who make up 33% of the employed and contributing family workers who make up 9%. There are 53% waged workers.<sup>52</sup>

In CUT-A, 5,060 workers from the informal economy are organized, out of a total 45,000 members. These mainly work as craftswomen and in the gambling industry.<sup>53</sup>

## Child Labour

A national survey demonstrated that 22% of children are engaged in child labour, much higher than the average for the Latin America and Caribbean region.

Children are more likely to work the older they are, as 8% of children aged 5-9 and 37% of children aged 14-17 are employed. Moreover, children are more likely to be engaged in child labour in rural areas (31%) than urban (15%); and boys (30%) are also much more likely than girls (15%).

Many children - primarily girls - work as domestic workers under the *criadazgo* system, in exchange for food, housing and promises of financial support for education. These children are vulnerable to exploitation.<sup>59</sup>

More than 400 judicial advisors and judges on child labor, forced labor, and child domestic labor issues.

Migration <sup>51</sup>		
Net migration (2008-2012)	Paraguay	- 40,000
Net migration to average population per year (2008-2012)	Paraguay	- 1 : 808 Inhabitants
	Latin America & the Caribbean	- 1 : 956 Inhabitants
Personal transfers i.e. remittances received, % of GDP (2012)	Paraguay	2.5 %
	Latin America & the Caribbean	1.1 %

Employment in the informal economy		
Total informal employed in non-agricultural employment	Paraguay (2011) <sup>54</sup>	65 %
	LAC (2012) <sup>55</sup>	48 %
Employment in the informal sector in non-agricultural employment	Paraguay (2011) <sup>56</sup>	35 %
	LAC (2012) <sup>57</sup>	31 %

It has been estimated that eight out of ten (80%) of enterprises have not registered their workers in the Social Security Institute (IPS), which indicates that a majority are not covered by social security.<sup>58</sup>

Despite these gains, child labor inspection system conducted significantly fewer inspections in 2012 than in 2011, though.<sup>60</sup> There are no data from 2013.

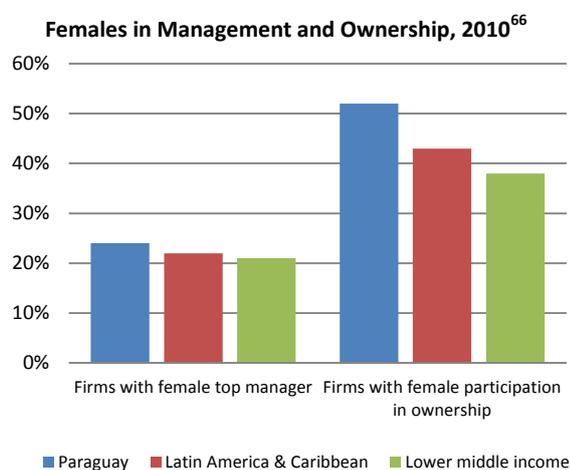
Working children			
Proportion of all children in age group			
Region	Age	Type	Proportion
Paraguay (2011) <sup>61</sup>	5-17	Child Labour	22.4 %
		Hazardous work	21.3 %
Latin America and the Caribbean <sup>62</sup> (2008)	5-17	Children in employment	13.3 %
		Child labourers	10 %
		Hazardous work	6.7 %

*Children in employment include all children who conduct some kind of work, whereas child labourers are a narrower term without mild forms of work. Hazardous work is the worst form of child labour as defined in ILO C182.*

## Gender

In terms of the Global Gender Gap Index, which is gender-based gaps rather than the actual levels of available resources and opportunities, Paraguay is ranking 89 out of 136 countries; and the 21th performer among Latin American and Caribbean countries.<sup>63</sup> During a longer period of 1960 to 2010, the country has made significant progress in eliminating legal differences in women's property rights and ability to make legal decisions.<sup>64</sup>

It is also observed that the country has a small overall Gender Pay Gap (GPG) of 5%. Women have even significant wage advantage in several industries, i.e. manufacturing, construction, transport, and finance. Notably the negative GPG in construction and manufacturing appear remarkable.<sup>65</sup>



## Youth

Youth employment in Paraguay is a pressing challenge: over 62% of the population is less than 30 years of age and 49% of these are engaged in the labour market under precarious conditions, with no access to social security. The youth unemployment sky rocketed in 2002, dived down to previous levels for men, while it also decreased for women there were a higher gap.

The Viceministry of Youth adopted a National Youth Plan in 2011 and it covers the period 2011–2013.<sup>73</sup> It has not been possible to assess the progress of the implementing of the plan.

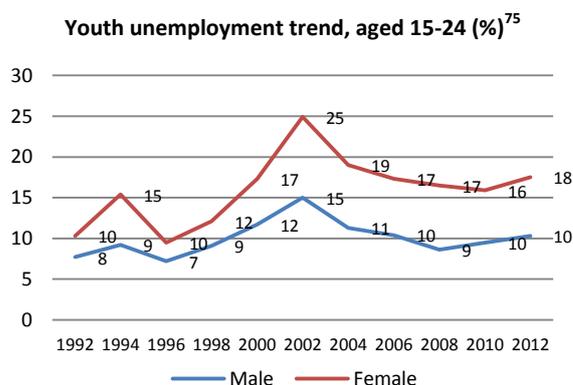
The Youth Employment Act (*Primer Empleo Juvenil*) was approved in May 2013, which obligates firms that at least 5% of employees are youth and half shall be women. Trade unions have criticized the law in terms of introducing flexibility on the labour market, which in practice reduces decent work conditions.<sup>74</sup>

As noted elsewhere in this report: Women have lower employment rates than men, though the difference is smaller than the regional average. Women are more likely than men to be affected by unemployment or underemployment than men, especially youth unemployment and underemployment.

One of the most common types of employment for women is as domestic workers. Around 20% of employed women (107,000) work as domestic workers and 83% of these received a wage below the national minimum wage.<sup>67</sup>

The minimum wage for domestic workers is set to be 80% of the national minimum wage; however, the average wage is still only 40% of the national minimum wage.<sup>68</sup> These domestic workers are vulnerable to exploitation and many of them are also child labourers.<sup>69</sup>

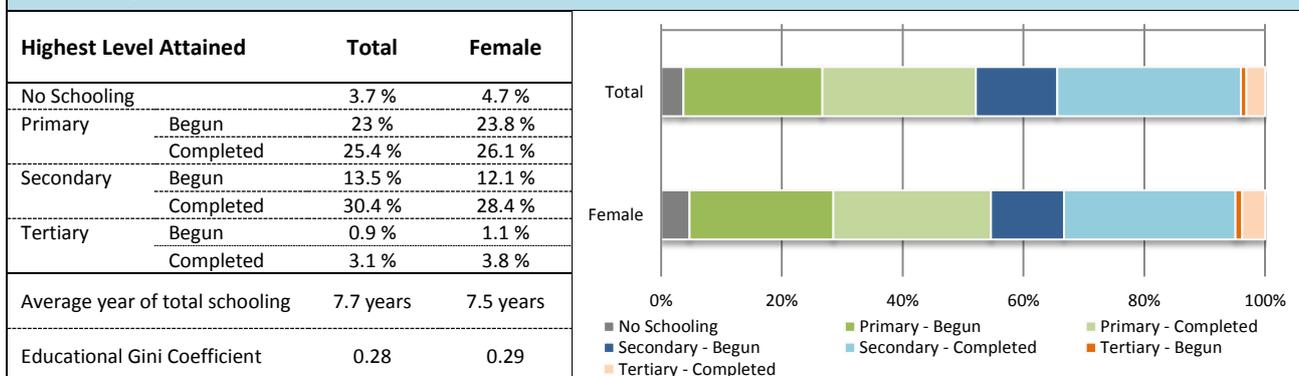
In 2009 all domestic workers were granted access to domestic workers insurance under the Social Security Institute (IPS).<sup>70</sup> And, as one of the first countries, Paraguay ratified the ILO Convention 189 on domestic workers in May 2013.<sup>71</sup> So far just over 10% of domestic workers are registered by the IPS. A communication campaign in this sector started to show progress in 2013 as the number of domestic workers registered with IPS increased by 8.7%.<sup>72</sup> A draft law that includes domestic workers covered by social security is in process, but has continuously been deferred.



Trade unions have promoted internal processes of reforms, including strengthening leadership of youth as well as forming a Youth Secretariat.<sup>76</sup>

## Characteristics of the Working Age Population

### Highest level attained and years of schooling in the population<sup>77</sup> (2010), Population 25+, Total and Female



Primary, secondary and tertiary is the internationally defined distinction of education. In Denmark these corresponds to grundskole, gymnasium & university.

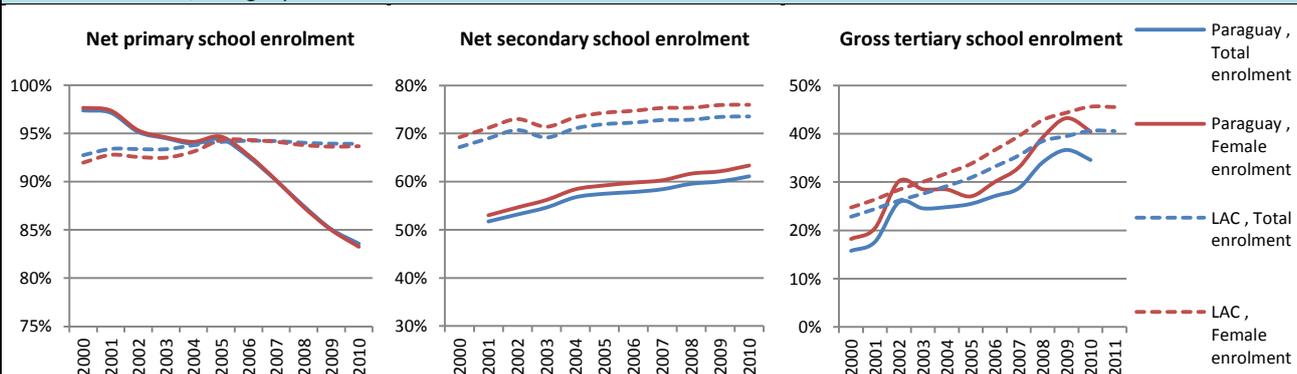
The educational Gini Coefficient is similar to the Gini Coefficient, but instead of measuring the distribution of income in a population, it measures the distribution of education measured as years of schooling among the population.<sup>78</sup>

Paraguay has a reasonably high level of education. Hardly any have ever been to school and more than 70% have completed primary school. Many have also completed secondary school, but few have a university education.

The gender difference in education is very small, with women only having 0.2 years less schooling than the average.

The graph above shows the educational attainment of all Paraguayans above 25 years, therefore gives a glance of the human capital of the labour force.

### Enrolment in Primary, Secondary and Tertiary schools (2000-2011)<sup>79</sup> Total and Female, Paraguay and Latin America & Caribbean



Net enrolment is the ratio of children of official school age, who are enrolled in school to the population of the corresponding official school age. Gross enrolment is the ratio of total enrolment, regardless of age, to the population of the corresponding official school age. Gross primary enrolment is therefore sometimes higher than 100%.

Primary enrolment has been in a sharp decline in the last decade, falling from in 97% 2000 to 84% in 2010. It is now well below the regional average.

More women than men tend to enrol, especially in secondary and tertiary schools, which is common for the region

## Vocational training

Vocational Training <sup>80</sup>		
Pupils in vocational training (2011)	Paraguay	60,488
Ratio of pupils in vocational student to all pupils in secondary education (Average 2007-2011)	Paraguay	10 %
	Latin America & Caribbean	9.3 %
Ratio of pupils in vocational training out of 15-24 year olds (Average 2007-2011)	Paraguay	4.8 %
	Latin America & Caribbean	5.2 %

There are close to 60,500 registered as pupils in vocational training and there has been an increase of the ratio of this group to all pupils in secondary education: from 7.5% in 2000 reaching 10.4% in 2011. Paraguay does have a similar ratio of vocational students as the regional average.

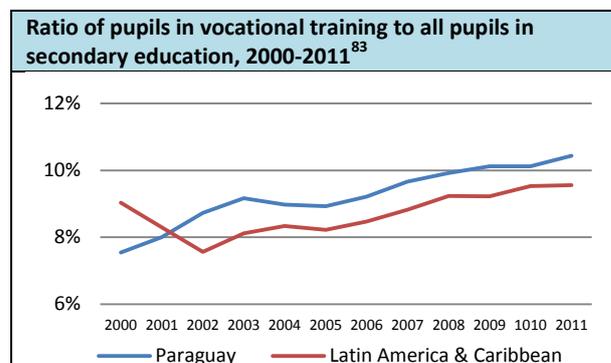
Throughout its history Paraguay has had a large number of successful initiatives in TVET but these have been scattered and uncoordinated, planned by different institutions in the public and private sector to target certain population groups with very specific training needs. According to UNESCO, Paraguay is currently in a process of strengthening the National Technical and Vocational Training (TVET) System. The National Plan for the Improvement of TVET 2011 – 2013, 2011 (*Plan Nacional de Mejoramiento de la Educación Técnica y Profesional en el Paraguay 2011 – 2013*) proposes to increase the number of institutions offering technical education in each geographical department and diversify vocational training programs according to the needs of the socio-economic development in order to have qualified professionals under a competition policy.<sup>81</sup>

Technical and Vocational Education programs are offered on a wide range at different levels in a variety of forms. Formal professional training is offered at Secondary education level through the so-called “*Bachilleratos Técnicos*”. There are currently twenty

four (24) fields to train technicians for the industrial, agricultural and the services sectors.

Non-formal TVET programs are offered in a wide range of public and private institutions, e.g.: i) Vocational Training is offered at Vocational Training Centres to young people over 16 years old who have finished at least 6 years of formal schooling; ii) Initial Professional Training is a non-formal program included in the basic bilingual education for people of 15 years of age and above; iii) Professional Training Level 1 is a non-formal program for people over 15 years who have concluded at least 6 years of formal schooling or its equivalent; and iv) Professional Training Level 2 is a non-formal program for people over 17, who have concluded at least 9 years of formal schooling or its equivalent. Also Informal TVET is widespread, with many young people, mostly in urban areas, educated through informal education provided through their community, family, groups of friends, the media, the Internet, etc.

It is estimated that 52% of formal firms in Paraguay are offering formal training.<sup>82</sup> But since the informal economy absorbs six out of ten workers from the non-agricultural sector, many youths have not access to these services. Moreover, since the urban youth unemployment rate is three times as high as the overall unemployment rate, there is a challenge of providing sufficient employable skills.



## Social Protection

Public spending on social protection schemes <sup>84</sup> (2010)		
Public social protection expenditure, excl. health	Paraguayan Guaran	3.9 trillion
	US\$	815 million
	% of GDP	4.1 %
	per capita	126 US\$
	% of government expenditure	41 %
Public health care	% of GDP	2.3 %
Health social protection coverage (2009)	% of population	24 %
Trends in government expenditure in health	% changes per year (2007-2011)	13 %

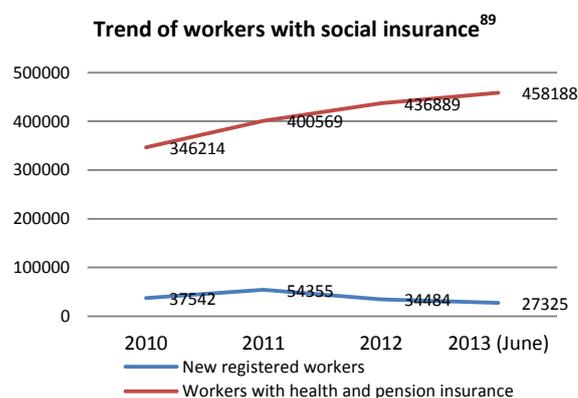
Benefits, coverage and contributions to pension schemes <sup>85</sup> (2010-2013)		
Social benefits for the active age	% of GDP	1.5 %
Pensionable age receiving an old age pension (age 60+)	Proportion of total	22 %
Old age effective coverage as proportion of programs	Contributory	4.3 %
Contributing to a pension scheme	Share of economically population, %	16 %

Paraguay's social protection system is under development. The system's coverage remains insufficient. So far, eight out of every ten citizens (78%) lack old-age protection and three out of four workers (76%) are not covered by health insurance.

The Social Security Institute (*Instituto de Previsión Social*, IPS) is the main institution in the social protection sector. The country's social security consists of the social security system and the National Health System. It targets workers in the formal economy due to coverage of social security contributions. On the other hand, workers in the informal economy do not receive any social protection. It is noteworthy that the coverage of social security to waged workers has increased from 346,000 in 2010 to 458,000 in 2013 (June).<sup>86</sup> CUT-A has noted some administrative improvements of the IPS, such as the integration of domestic workers in the organization's services, but remains slow, e.g. declining new registered members of IPS.

The employer pays 9%, the employee 14% and the state 1.5% of the salary to IPS. Self-employed can choose to be covered by the IPS insurance providing medical, sickness and maternity benefits, but are

excluded from the other parts of IPS.<sup>87</sup> The IPS includes approximately 50% of the contributing workers. Other funds cover old-age and survivors' benefits: i.e. fiscal, municipal, railway, banking, parliament, and Itaipú Fund.<sup>88</sup>



The National Health System has private and public entities. It includes the Social Security Institute (SSI) that is responsible for providing health care to the population. Registration in the SSI is mandatory. Defaults are subject to fines. Also, the employer who fails to register or notify the hiring of a worker, or fails to pay the corresponding contribution, shall be responsible to the Social Security Institute in case of injury, or death derived from a work accident. ILO has argued that overlapping functions and a lack of coordination between the different organizations have led to an unequal distribution of health care in the country's different regions. Among others, the government expenditure in health has increased on 13% in the period 2007 to 2011, but still only 24% of the population is covered by health social protection, which is far below neighboring countries' rates.<sup>90</sup>

Paraguay runs a couple of non-contributory programmes: The *Red de Protección y Promoción Social* for poor households, which transfers US\$10 to US\$30 per family per month. Moreover, a transfer of US\$10 to a US\$5 transfers per child for health and educational expenses. Transfers are conditional on visits to health centres by children and mothers, and school attendance. Although outdated data from 2006 demonstrated it had 9,000 beneficiaries, it suggests the limited outreach of the program. Paraguay also runs the TEKOPORÂ and PROPAS II, which transfers US\$6 per month per child or pregnant women for targets to extremely poor households.<sup>91</sup>

## General Economic Performance

Key Facts <sup>92</sup> (2013 est.)				
GDP	GDP per capita (PPP)	GDP real growth	HDI (2012) <sup>93</sup>	Gini Index (2009)
30.6 billion US\$	6,800 US\$ 143 of 229 countries	12 %	0.669 111 of 187 countries	53.2 13 of 136 countries
<p>The Human Development Index (HDI) measures the average of a long and healthy life, access to knowledge, and a decent standard of living.</p> <p>This Gini Index is measured if income were distributed with perfect 'equality', the index would be zero; if income were distributed with perfect 'inequality', the index would be 100. In terms of the ranking, the first country has the highest inequality, while the number 136 has the highest equality.</p>				

Doing business <sup>94</sup>	Control of corruption	Government effectiveness	Rule of Law
92 of 189 countries	-0.85 (2007) -0.90 (2012)	-1.06 (2007) -0.87 (2012)	-1.24 (2007) -0.84 (2012)
<p>A high ranking on the Ease of Doing Business Index means the regulatory environment is more conducive to the start-up and operation of a local firm.<sup>95</sup></p> <p>The selected Governance Indicators cover the years 2007 and 2012, and ranking from -2.5 to 2.5; i.e. negative tendencies below the zero mean and unit standard deviation, score negative measurements.<sup>96</sup></p>			

Paraguay has strong commerce, clean energy, agriculture, and retail sectors, but most of the economy's strengths tend to be focused in small areas. The country has one of the highest concentration of land in the hands of a few: 1.6% of farmers own 79% of all land, and 41% of farmers own less than five hectares.<sup>97</sup> It is reflected as one of the highest Gini Index rates in the world. On the Human Development Index the country has stepped down on one step in the period 2007-2011 rank change, reaching 111 out of 187 countries.

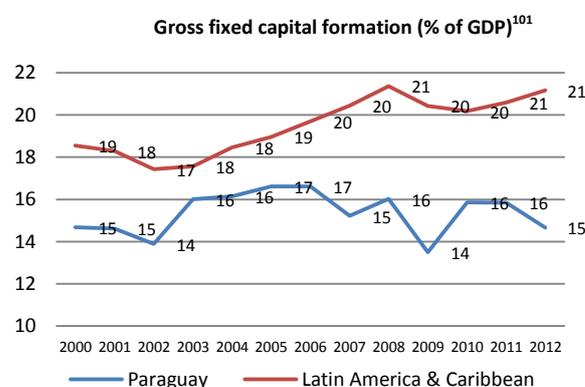
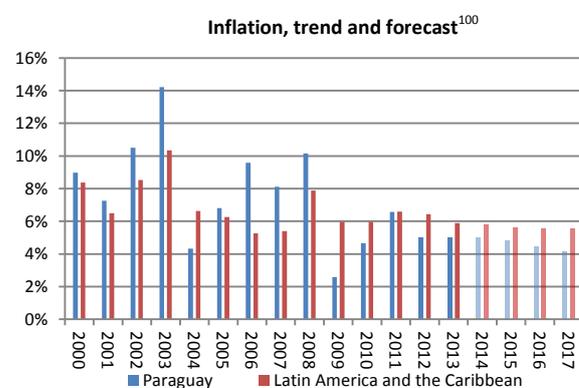
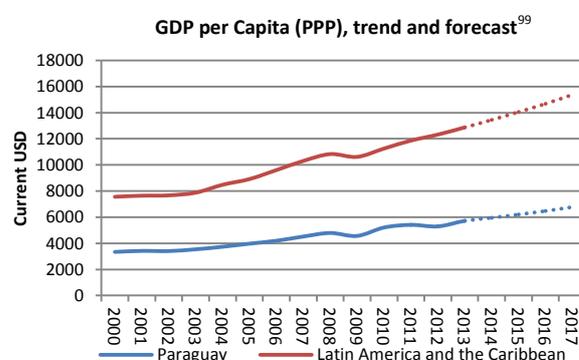
The economy has a high volatility in growth. After an economic expansion at 4.3% in 2011, the severe drought in the first quarter of 2012 and the outbreak of foot and mouth disease in late 2012 influenced a decline in Gross Domestic Product (GDP) close to 1.2% for the year. The growth rebounded in 2013 of an estimated 12%, but again is predicted in 2014 to 4%-5%.<sup>98</sup>

The country is rich of natural resources, including that electricity is renewable and comes from hydroelectricity, in particular the Itaipu and Acaray dams, which is shared with Brazil and Argentina, respectively. Due to its substantial hydroelectric

power, the country is on its way to becoming one of the world's largest producers of hydroelectric power.

The gross fixed capital formation has been quite stable, but it is lower than the regional average in the Latin America and the Caribbean.

The Doing Business indicator ranks Paraguay on medium at 92 out of 189 countries. On the three governance indicators: Control of Corruption, Government Effectiveness and Rule of Law, Paraguay have low scores. The latter has noteworthy improvements, though.



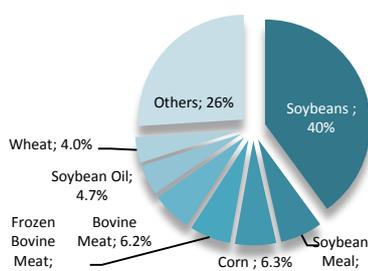
## Trade

Trade and Foreign Direct Investment <sup>102</sup> 2013 (est.)			
Exports	Imports	FDI flow <sup>103</sup> (average 2008-12)	FDI Stock
14.7 billion US\$	12.4 billion US\$	233 million US\$	4.5 billion US\$
48 % of GDP	41 % of GDP	0.8 % of GDP	15 % of GDP

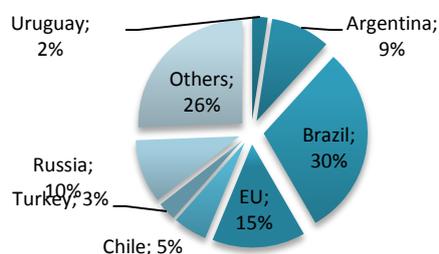
Paraguay has a quite open economy. Exports rose considerably, boosting its trade balance more than any other country's according to the IMF<sup>104</sup>, and has recently turned a trade deficit to a surplus. Agricultural and manufactured exports enjoy favorable access to international markets. The export sector is largely in agricultural products, particular with soy beans, corn, and meat. As previously mentioned, the Itaipu dam is the largest hydroelectric dam in the world; and the country only consumes about 6% of its share, and exports the rest, which gives a steady source of revenue for the state. However, the export revenue is vulnerable to international price declines.

The internal trade is focused on re-export of goods from Asia and the United States to Argentina and Brazil. Much of these activities is through the informal economy.

Paraguay's main products share of exports (2012)<sup>105</sup>



Paraguay's main export markets (2013)<sup>106</sup>



### Trade agreements

Paraguay is a founding member of the MERCOSUR custom union in 1991. There was a long-term diplomatic rift between several members of the union and Paraguay due to the Paraguayan legislature

objections to Venezuelan membership. MERCOSUR suspended Paraguay of the union in 2012 due to a breach of MERCOSUR's democracy clause.<sup>107</sup> Afterwards Venezuela's accession was approved by the organization. In Paraguay, the Congress impeached and removed the former president from office in June 2012. In the aftermath of the new President, Horacio Cartes, which was installed in August 2013, the Paraguay's Congress accepted Venezuela's incorporation in the union and Venezuela was fully joined MERCOSUR with Paraguay vote. Paraguay was also fully reintegrated into Mercosur in January 2014.

MERCOSUR and the European Union talks of a free-trade pact have dragged on for almost two decades, but it is now expected to discuss conditions for signing the agreement at the start of 2014.<sup>108</sup>

Paraguay benefits from the United States' Generalised System of Preferences (GSP). GSP is a unilateral trade benefit from the U.S. government, allowing duty and quota free access for some products. A country can be removed if it is violating or do not take steps to uphold the ILO Core Labour Standards. Each country is reviewed annually, by the US government.<sup>109</sup>

Paraguay also benefits from EU's unilateral GSP+ special incentive arrangement, which allows duty and quota free access for most products. To be granted and continue to be granted GSP+, a country must ratify and effectively implement conventions within human rights, environmental and the eight ILO Core Conventions. The European Parliament and European Council will examine each beneficiary every second year.<sup>110</sup> GSP+ is very much a continuation of the 'special arrangement to combat drug production and trafficking', which Paraguay benefitted from before 2005.

### Export Processing Zones

Paraguay has a few Export Processing Zones in the East. The same labour laws apply in this sector as in the rest of the country.<sup>111</sup> In this respect, the country has very comprehensive legal systems regarding foreign investments. Unless an application is filed for incentives granted under Law 60/90 for the Promotion of Investments or the *Maquila* or Free Trade Zone Laws, investors need no governmental approval to invest.<sup>112</sup>

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