Russian Labor Market: Recent Trends

Monitoring Update: May 2009

Moscow

June 2009
The Russian Labor Market: Recent Trends periodic update seeks to improve the awareness of the authorities, experts and business leaders of the situation and trends in the labor market to contribute to informed and effective decision-making. The update has been jointly prepared by the World Bank and the Federal Service for Labor and Employment. The update presents indicators produced using various statistical sources, including the Federal Service for Labor and Employment, the Federal Service for Statistics, and the Ministry for Education and Science. It presents main findings on current labor market conditions, including trends in employment and unemployment, use of working hours, wages and regional labor market disparities. A special focus of the June update is employment prospects of 2009 education system graduates.

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Main Findings

The labor market situation in Russia remains difficult, but it has been stabilizing recently. By April 2009, the unemployment rate (ILO definition) went up to 10.2 percent, which is 4.2 percentage points higher than a year ago. January-March 2009 was the most difficult period. The first signs of decreasing labor market tension emerged in April, as the number of newly registered unemployed decreased against a backdrop of stronger growth of vacancies.

The labor market is adjusting to weaker business activity via three major mechanisms: reduced employment, lower real wages, and shorter working hours. Over the last year, employment dropped by 5 percent and real wages by 4 percent, on the average. In addition, shorter working hours are now used by businesses on a much larger scale. Regions vary a lot in their responses to the crisis. In 31 regions, the number of unemployed registered over the last year since May 2008 has more than doubled while for the whole country it increased by the factor of 1.6. In relative terms, regions with a more favorable pre-crisis labor market conditions have been affected more severely.

- The labor market situation remains difficult. ILO unemployment continues to grow. The fall in registered unemployment in April-May 2009 are to some extent related to seasonal factors.
- The labor market is adjusting to weaker business activity via three major mechanisms: shorter working hours, reduced employment and lower real wages. Wage arrears have not become a common response to the crisis despite a significant increase by the end of 2008.
- Economy-wide employment contraction accelerated in early 2009. Since April 2008, the economy lost 3.4 million jobs or 5 percent of the total number. While lay-offs peaked in December 2008, in Q12009 they subsided and have remained stable since then, though at a higher level than in previous years.
- Real wages have been decreasing since February 2009. A 4 percent decrease in real wages compared to the preceding year is relatively moderate; however the fall is more pronounced in the production sectors.
- Shorter working hours are still used on a large scale following a drastic jump at the end of 2008. A large number of workers were forced to take unpaid leaves. Manufacturing industries were hit especially hard: up to 25% of all workers were affected by various forms of shortened working time.
The labor market crisis has most severely hit workers in the industry, construction and trade sectors. The situation in the power, gas and water production/distribution sectors that used to be relatively safe during the first months after the onset of the crisis has been deteriorating rapidly over the last few months.

The weaker labor demand is reflected in a dramatic reduction in the number of job vacancies. The total number of vacancies reported to employment services in Q12009 was 20-25 percent lower than 12 months earlier. Unemployment growth and the drop in the number of vacancies was associated with a sharp increase in the unemployment/vacancy ratio, which indicates the growing labor market tension.

A positive recent development is a recovery in the number of newly registered vacancies, in April-May 2009. A larger supply of new vacancies led to some reduction in the unemployment/vacancy ratio during these months.

A rise in registered unemployment is primarily driven by increase in urban unemployment and among men. Indeed, the crisis has affected, first of all, industry and construction sectors, which are dominated by male employment. As male prime-age unemployment grows, the competition for jobs will intensify, with potentially negative consequences for youth employment.

The crisis has had the strongest impact on economically advanced regions, because industry, construction, finance and trade sectors were hit the most severely. Less developed regions with a high share of agriculture and budget sector employment have been less affected.

The entry of vocational and professional school graduates may cause a significant pressure on the labor market. The graduates of (day-time) primary, secondary and higher vocational and professional schools on average will represent almost 2 percent of the work force, but in some regions they will represent over 3 percent.

The Government’s Crisis Response Program provides for regional programs to alleviate labor market tensions. Available data suggest that these programs are well targeted, as more funds are allocated to regions with worse labor market conditions. Regional programs include 4 types of activities: public and temporary works, training, relocation and self-employment support. Priority is given to public and temporary works, with 80 percent of all regional spending to be allocated to finance these activities.
Macroeconomic Environment

- Industrial output in Russia has been declining for the sixth consecutive month. A slowdown in the decline in February-March 2009 has proved unsustainable, as the slump accelerated again in April-May 2009.

- The labor market adjustment is taking new forms, as employment contracts considerably, while real wages decline only moderately.

- Declining employment pushes shrinking consumer demand further down.

Figure 1. Industrial production, employment and wages, in percent to the same month of the previous year.

![Figure 1. Industrial production, employment and wages, in percent to the same month of the previous year.](image-url)
Employment and Unemployment

- A noticeable rise in unemployment, started in autumn 2008, continues. Growth rates of registered unemployment became closer to growth of general unemployment.

- A seasonal drop in new unemployment numbers, observed in April 2009, is less pronounced than in the previous years.

- A peak in lay-offs was observed in December 2008. Their intensity decreased in the following months, while employment continued declining.
The most apparent labor market response to the economic crisis has been a decline in employment. This response is different from the 1990s when the most of adjustment was in the area of real wages decline.

The employment decline accelerated in early 2009. During a year, since April 2008, the Russian economy lost 3.4 million jobs, which is about 5 percent of total jobs.

Figure 2. Employment numbers

![Employment numbers graph]

Source: Rosstat

Registered unemployment growth accelerated since December 2008, and came close to general unemployment growth in terms of annual rates. Registered unemployment numbers grew by 642 thousand (to make it 2.18 million people) compared to April 2008, while general unemployment numbers increased by 3.2 million people during the same period (up to 7.7 million people).

Registered unemployment growth eased down slightly in April-May, but this development may be explained by seasonal factors.

Fig. 3 Change in unemployment numbers, growth in % YoY

1 The Update differentiates between general unemployment, defined in compliance with the ILO methodology, and registered unemployment as treated in the Russian legislation. ILO defines the unemployed as persons who during the reference period were without work, were specifically seeking work and who are currently available for work. The Russian law recognizes as unemployed working age and capable of working individuals who do not have a job nor pay, are registered with employment services as job-seekers and are available for work.
Fig. 3. Change in unemployment numbers, YoY growth in %

Source: general unemployment - Rosstat, March-April - estimate; registered unemployment - Rostrud
Newly registered unemployment growth slowed down in April-May 2009. For the first time since December 2008 May saw a decline in registered jobless total.

Starting from December 2008, every month, employment services have been registering twice as many unemployed than a year ago.

Despite the crisis, registered unemployed have the same chances of finding a job as in previous years. This may be related to their lower expectations and increased possibilities for temporary employment.

Chronically unemployed growth risks have not increased.
- A rise in registered unemployment is caused primarily by a rise in urban unemployment and among men. It has happened because the first sectors hit by the crisis were industry and construction, where male employment prevails.

- A rise in unemployment has to some extent affected all the demographic groups of the population. Female and rural unemployment is also rising, but at a slower rate.
Fig. 8. Rural unemployment

Source: Rostrud
While the crisis has not so far resulted in a rise in registered youth unemployment, some adverse signals have emerged in the labor market, specifically: the share of unemployed aged 20 – 24 was higher in QI2009 than in 2007-2008, albeit only marginally.

Youth entry to the labor market demonstrates strong seasonal fluctuations, related to graduation. In this context, a rise in youth unemployment may be expected in QIII2009.

The crisis has resulted in fewer vacancies claimed to employment offices. The total number of vacancies at 1.2 million as of the end of May 2009 is still 20-25 percent lower than in January-May 2008.

Following a steep fall in new vacancies by the end of 2008, the situation stabilized. Moreover, there were more new vacancies registered in April-May 2009 than in the same period of 2008. The growth in new vacancies offered by employment services may be partly explained by recent improvements in collecting information from employers.
• The number of unemployed per one vacancy is the most informative labor market indicator, because it reflects both labor demand and labor supply.

• The labor market situation has been deteriorating since November 2008, first of all due to lower labor demand, as jobs were cut and unemployment soared.

Fig. 11. Number of unemployed per one vacancy registered with employment offices

- General unemployment (ILO)
- Registered unemployment

Source: general unemployment - Rosstat, March-May - estimate; registered unemployment, vacancies - Rostrud

• The business initial response to the crisis was to restrict new employment, with a moderate rise in lay-offs.

• December 2008 saw a spike in lay-offs. Employment by major and medium-size enterprises\(^2\) decreased by 1.1 million people over the five months from December 2008 through May 2009.

• While the situation has stabilized in recent months, dismissals are still exceeding recruitments.

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\(^2\) The economic activities covered by this survey include the resource extraction sector, manufacturing industries, production and distribution of electricity, gas and water, construction, wholesale and retail trade, transport, communications and the financial sector. Large and medium-sized enterprises account for about \(j\) of all employment in the economy.
The crisis has not considerably increased the number of layoffs due to downsizing. The structure of dismissal reasons remains relatively stable.
The share of electricity sector, housing and utilities sector and public administration in dismissed employees registered as unemployed increased in May-April 2009. On the other hand, the group of newly recognized unemployed shows a shrinking share of the manufacturing sector. Redundancies in this sector peaked in December 2008 - January 2009.
Working Hours

• Enterprises continue to use underemployment as an important form of adaptation to the crisis.

• The use of underemployment stabilized in the spring of 2009 following a rapid growth in QIV2008.

• Industry and construction show the highest share of employees on shortened hours.
• In response to the crisis, businesses have widely extended their use of various forms of shortened working hours during QIV2008. A large number of employees were forced to take unpaid leaves.

• It is difficult to estimate the number of employees covered by various forms of forced shortening of working hours, but at least administratively initiated shortened hours applied to about 6 percent of the total workforce at large and medium-sized enterprises of the key sectors of the economy.

Fig. 15. Part-time employment, large and medium-sized enterprises in key sectors, thousand people

- Worked shortened hours on employer’s initiative
- Worked shortened hours by employer-employee agreement
- Took administrative partially paid leaves
- Took unpaid leaves on employee initiative

Source: Rosstat

• The use of shortened working hours widely varies across sectors.

• Manufacturing industries, construction and resource sectors show the biggest share of labor force on shortened hours on the administration’s initiative.
Wages

- A slowdown in real wage growth in QIV2008 gave way to a decline. The overall scope of decline in real wages remains moderate, with a more pronounced fall in industrial sectors.
- Wage arrears remain insignificant and relatively stable.
• A slow-down in real wage growth gave way to a decline, starting from February 2009. The decline is still moderate at about 4%, but given the wage rally of previous years, even this decline is perceived as a sizeable deterioration.

![Fig. 17. Wages](image)

Source: Rosstat

• In recent months, the number of industries and sectors with real wage contraction has increased. Compared to March 2008, agriculture and the budget sector are still “in the black”, but even in these sectors the impact of the budget sector salary increase in December and the minimum labor compensation increase in January has largely worn off.

• Construction, industry and the financial sector have seen the most noticeable fall in real wages caused by the crisis.

![Fig. 18. Change in real wages by activities, in %](image)

Source:
The crisis caused spikes in wage arrears in November 2008 and in January 2009. In recent months wage arrears have been decreasing.

The number of employees affected by wage arrears remains low at 1-1.5 percent of the total labor force (large and medium-sized enterprises).

**Fig. 19. Wage arrears, large and medium-sized enterprises**
Regional Differentiation of Labor Market Conditions

- There is a strong variance in crisis response across regional labor markets. In relative terms, most severely hit were the regions with strong pre-crisis economic performance. As a result, the overall regional differences in registered unemployment figures decreased.

- More affected were the labor markets of the economically advanced regions, because in these regions the first and most hit were manufacturing, construction, finances and trade. Lower developed regions with a high share of agricultural and public sector employment were less affected by the crisis.

- Registered unemployment has considerably increased in all the regions since October 2008. On the other hand, the regional variability in registered unemployment has decreased. In April 2009 the maximum unemployment rate exceeded its minimum rate 11 times compared with 21 times in October 2008. The regions with low pre-crisis unemployment saw a steeper deterioration than the regions with high unemployment before the crisis.

<table>
<thead>
<tr>
<th>Registered unemployment rate: regional aspect</th>
<th>Unemployment rate, %</th>
<th>5 regions with the highest registered unemployment rate</th>
<th>Unemployment rate, %</th>
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</thead>
<tbody>
<tr>
<td>Moscow</td>
<td>0.83</td>
<td>Republic of Adygeia</td>
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<td>Krasnodar Territory</td>
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<td>St Petersburg</td>
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<td>Kaluga Region</td>
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<td>Republic of Tyva</td>
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<table>
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<th>Unemployment rate, %</th>
<th>5 regions with the highest registered unemployment rate</th>
<th>Unemployment rate, %</th>
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<td>Republic of Kalmykia</td>
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<td>St Petersburg</td>
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<td>Amur Region</td>
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<td>Kaluga Region</td>
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<td>Kabardino-Balkarian Republic</td>
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<td>Moscow Region</td>
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<td>Republic of Tyva</td>
<td>6.20</td>
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* Excluding Chechnya and Ingushetia
### 10 regions with the strongest unemployment growth

<table>
<thead>
<tr>
<th>Region</th>
<th>Registered unemployment rate, %</th>
<th>Growth in registered unemployment rate, October 2008 – June 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vologda Region</td>
<td>4.4 / 1.1</td>
<td>3.9 times</td>
</tr>
<tr>
<td>Nizhny Novgorod Region</td>
<td>1.8 / 0.5</td>
<td>3.6 times</td>
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<tr>
<td>Chelyabinsk Region</td>
<td>3.6 / 1.0</td>
<td>3.6 times</td>
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<tr>
<td>Yaroslavl Region</td>
<td>3.5 / 1.0</td>
<td>3.4 times</td>
</tr>
<tr>
<td>Vladimir Region</td>
<td>3.8 / 1.2</td>
<td>3.3 times</td>
</tr>
<tr>
<td>Sverdlovsk Region</td>
<td>3.5 / 1.1</td>
<td>3.3 times</td>
</tr>
<tr>
<td>Tver Region</td>
<td>1.9 / 0.6</td>
<td>3.2 times</td>
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<td>Republic of Tatarstan</td>
<td>3.2 / 1.0</td>
<td>3.2 times</td>
</tr>
<tr>
<td>Kaliningrad Region</td>
<td>3.7 / 1.2</td>
<td>3.1 times</td>
</tr>
<tr>
<td>Moscow Region</td>
<td>1.5 / 0.5</td>
<td>2.9 times</td>
</tr>
</tbody>
</table>

- Registered unemployment numbers increased over the year (April 2008 - April 2009) in 77 out of the 82 regions of the Russian Federation (4 regions more than in March 2009), as it more than doubled in 31 regions. The regional variance in growth is very high.
A number of region demonstrated a persistently strong growth in unemployment during the whole period from January to May 2009. This group of regions is dominated by industrial regions, specializing in metallurgy, machine building and other manufacturing industries.

The Kurgan, Novosibirsk, Kaliningrad, Yaroslavl, Penza and Tver Regions showed a dramatic decrease in the number of vacancies registered by employers with employment offices.
Fig. 22. Growth in registered vacancies number, May 2009 to May 2008

Overall RF - 21%
The rating of Russian regions measured by labor market tension remains effectively unchanged. The leaders are still the ethnic republics of the Southern Federal District and Southern Siberia. The new outsiders include the Transbaikal, Chelyabinsk and Bryansk Regions.
Regional Programs to Address Labor Market Tensions

• More budget funds are earmarked for implementation of regional programs with more difficult underlying labor market conditions.

• In most regions public and temporary works is the biggest program in terms of coverage and size of budget funding.

• Various types of employment support are considerably different in terms of costs per one participant.

• All the employment support forms demonstrate visible regional per capita cost variance.
Regional programs to ease labor market tensions include four types of activities: public and temporary works, training, relocation and self-employment support.

Public and temporary works are a priority program in the overwhelming majority of regions. More emphasis is given to training in the Penza, Irkutsk and Leningrad regions, in St Petersburg and in Komi. Self-employment is the focus of attention in Dagestan and Tyva, Tyumen and Rostov regions. Many Far East regions, Ingushetia, Lipetsk and Tomsk regions have put aside sizeable funds for relocation.
National average per capita spending on public and temporary works is planned at the level of one monthly salary in the region. Public works are projected for up to three months.

The planned costs vary considerably: in certain, predominantly poor, regions, the costs make about two average local salaries, while in other regions they may be less than half of the average local salary.

**Fig. 25. Planned per capita public works costs to local average salary in March 2009, in times**
• National average per capita training costs are planned at about half of the average monthly salary.
• The planned costs vary considerably: in certain regions they may amount to one average salary, while in other regions – less than one third of the average local salary.

**Fig. 26. Planned per capita training costs to local average salary in March 2009, by factor**
- Relocation to other regions is included in programs of 37 regions. Average per capita relocation spending is planned at about three average monthly salaries in these regions.
- The planned costs vary considerably: in some regions they exceed five average salaries, while in other regions are under one average local salary.

**Fig. 27. Planned per capita relocation costs to local average salary in March 2009, by factor**
- National average per capita self-employment costs are planned at about three average monthly salaries.
- The planned costs vary considerably: in some, predominantly poor, regions the costs may amount to about six average salaries, while in other regions less than two local average salaries.

**Fig. 28. Planned per capita self-employment costs to local average salary in March 2009, by factor**
Vocational and professional school graduates in the labor market

• Graduates of 2009 represent considerable potential pressure on regional labor markets. The level of possible pressure has high regional differentiation.
• Higher education implies a lower risk of unemployment. Lack of vocational or professional training increases risks of unemployment.
• Higher education implies a lower unemployment risk. Secondary school graduates face a high unemployment risk, constituting the largest group within the unemployed pool.

Fig. 29. General unemployment and education, November 2008

- In 2009, vocational and professional schools will produce 2.5 million graduates, including 1.5 million of full-time graduates.
- Unemployment risks are highest for primary vocational graduates. University graduates face lower unemployment risks. While higher school graduates account for 40 percent of total graduates, they make only 23 percent of graduates, registered as unemployed.

Fig. 30. Distribution of graduates

Source: Rostat

Source: total graduates - Ministry of Science and Education monitoring preliminary data;
unemployed graduates - Rosstat
• Graduates of 2009 may cause a significant pressure on the labor market. The regional variance in this pressure is rather high.

**Fig. 31. Share of primary, secondary and tertiary vocational and professional graduates in labor force, 2009, %**

Source: calculated on the basis of Russian Ministry of Science and Education monitoring preliminary data
The majority of full-time graduates (about 70 percent) are planning to enter the labor market after graduation. Each tenth graduate believes that he/she would not be able to find a job independently, and would need further assistance. In some regions this risk is considerably higher.

**Fig. 32. Unemployment risks by regions (on the basis of full-time graduates survey), in % of total graduates of primary, secondary and tertiary vocational and higher schools**
### Table 1. Registered unemployment numbers

<table>
<thead>
<tr>
<th>Month</th>
<th>Registered unemployment numbers as of the end of the month, people</th>
<th>Registered unemployment numbers as of the end of the month, YoY growth in %</th>
<th>Registered unemployment numbers as of the end of the month, MoM growth in %</th>
<th>Registered unemployment rate, %</th>
<th>For reference: general unemployment rate (ILO), %</th>
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<td>58.3</td>
<td>-2.6</td>
<td>3.0</td>
<td>9.9*</td>
</tr>
</tbody>
</table>

Source: Rostrud; General unemployment rate – Rosstat, * -preliminary estimate