

Carla Cisternas & Chantal Clerc

Ministerio de Trabajo, Chile



Anticipating the Future of Work: Chile's Labor Observatory Program and National Labor Demand Survey

In November 2023, Chile's Ministry of Labor and Social Security approved and published the National Labor Market Foresight Strategy (ENPL), proposed by the Ministerial Advisory Commission on Labor Foresight. This initiative provides the Ministry and its associated employment services with an institutional framework to address the challenges of the future of work by establishing a robust and comprehensive system to monitor and anticipate the characteristics of, and mismatches between, labor supply and demand.

The main implementation tool of the ENPL is the Labor Observatory Program, designed to generate territorial and sector-specific insights into the country's key occupations, their characteristics, supply and demand, and the technological and socio-ecological challenges workers face. One of the program's most important components is the National Labor Demand Survey (ENADEL), a probabilistic and stratified survey aimed at characterizing business labour demand and measuring unmet workforce needs by occupation across various economic sectors.

The 2024 edition of the survey achieved its highest historical coverage, surveying 5,965 companies. Over 3.5 million hires were identified in the 12 months prior to the survey, primarily in administrative services, agriculture, commerce, and construction. The most in-demand roles were operational and labor-intensive, accounting for 85.0% of active or projected vacancies for 2025. Despite this, mismatches remain: 9.6% of companies reported difficulties filling vacancies. In this context, 64.9% of businesses expect to provide training for their staff over the next year.

Finally, the findings show that although digitalization and automation are present in more than 95.3% of companies, their impact on employment has been limited. By contrast, the effects of climate change, though still emerging, have already affected 24.9% of companies. In this way, ENADEL is becoming a key tool for evidence-based labour market foresight, capable of anticipating structural transformations and informing more agile and targeted policies focused on strengthening the country's human capital.