COVID-19 and labor market adjustments in Southeast Asia: Who has been hurt and what policies have mitigated the impact?

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ABSTRACT

In addition to its massive costs in terms of human lives and health outcomes, the COVID-19 crisis had unprecedented impacts worldwide, resulting in major job and income losses. Although the crisis affected all countries, the scale and shape of labor market impacts and adjustment patterns have differed, driven by various contextual and institutional factors (e.g., the spread of the virus, stringency of containment measures, job protection, and other response policies, etc.) This paper provides an in-depth analysis of the labor and socio-economic effects of the pandemic across Southeast Asia. It describes the impact channels and traces the evolution of the crisis throughout 2020 and the first half of 2021. Using quarterly Labor Force Survey (LFS) data, we follow the progression of demographic groups across labor force statuses (transitions from employment to unemployment, exits from labor force), and transitions within-employment (e.g., sectoral labor reallocation or shifts from wage employment to self-employment, or to own-account and contributing family work). We then decompose working hour losses to assess to which extent intensive and extensive margins of adjustment were used. Results show that lockdown and containment measures, while playing a major role in limiting the spread of the virus, prevented labor reallocation, resulting in a surge in unemployment and massive exits from the labor force. Women and youth have been hit particularly hard due to their overrepresentation in heavily affected sectors and among vulnerable groups, including self-employed workers, informal workers, temporary workers, and low-skilled workers. The paper emphasizes structural issues of policy concern for Southeast Asian countries. We provide a tentative assessment of the governments' response to COVID-19 in the region by juxtaposing specific policies with labor market impacts and providing a comparative analysis of these policies in terms of their timeliness, coverage, adequacy, and the extent to which they addressed pre-existing social protection gaps.

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1 Introduction

Over the decade preceding the coronavirus disease (COVID-19) pandemic, significant progress had been made in poverty reduction in Southeast Asia (United Nations [UN], 2020), but major labor market challenges remained. A large number of workers still lived with their households below or just above the poverty line, particularly in the lower-income countries of the region. Structural change, driven by trade and technology, was accompanied by increasing inequalities within and across countries (International Labour Organization [ILO], 2021a) Large segments of the population remained highly vulnerable to economic shocks due to widespread informality and limited social protection (ASEAN Secretariat, 2019).[1] Against this backdrop, the COVID-19 pandemic hit the region hard and threatens to reverse the significant gains in poverty reduction and improvements in labor market outcomes.[2]

COVID-19, which started as a public health crisis in early 2020, rapidly turned into a pandemic accompanied by an unprecedented global economic and labor market crisis. To stem the virus' transmission, national governments shut down international and local borders, which disrupted global and local supply chains, and led to major contractions in aggregate demand. These factors, together with widespread firm and workplace closures, resulted in significant job and income losses, reductions in working hours, changes in working arrangements, and other forms of labor market adjustments. Based on the latest International Labor Organization (ILO) findings, relative to the 4th quarter of 2019, Southeast Asia recorded a decline in working hours of 8.4% in 2020, equivalent to 24 million full-time equivalent jobs (ILO, 2021b). This decline peaked in the 2nd quarter of 2020 at 17.8% and eased to 5.7% in the last quarter of 2020. The share of workers living in countries with COVID-19-related restrictions has remained high, at 93% in early January 2021 compared to the peak of 97% in April 2020, with a slightly lower share at 90% in the Asia and the Pacific region (ILO, 2021b; ILO, 2020b).

While the labor market and socio-economic impacts of the COVID-19 crisis have been substantial, the policy response has been commensurate with these impacts, as many countries around the world dedicated large fiscal response packages (International Monetary Fund [IMF], 2021). Social protection, broadly defined as policies to protect jobs and support incomes, has constituted an integral part of the response, particularly at the early stages of the crisis (Asian Development Bank [ADB] 2021, ILO 2021c). In Southeast Asia, where social protection systems were generally weak, 91 policy interventions[3] were implemented since the onset of the crisis, out of which 45% were social assistance measures, 38% labor market and employment protection measures, and 16% social insurance measures.[4]

Our paper makes two key contributions to the literature: first, we provide a detailed account of COVID-19 impacts on the labor markets of five Southeast Asian countries (Indonesia, Malaysia, Philippines, Thailand, and Viet Nam) and a tentative assessment and comparative analysis of the

[1] The share of workers in informal employment, ranged from 64% in Thailand to 94% in Cambodia, in the latest year for which data are available for these countries (Annex Table 1).
[2] After nearly two and a half decades with steady global declines in extreme poverty, World Bank (2020) reveals that poverty reduction has suffered its worst setback as COVID-19 is expected to push some 100 million people into extreme poverty during 2020 alone. The crisis also partly changed the profile of global poverty by creating millions of "new poor" who are more urban, better educated, and less likely to work in agriculture than those living in extreme poverty before COVID-19. ILO (2021a) also estimated that an additional 108 million workers are now extremely or moderately poor, meaning that they and their family members are having to live on less than US$3.20 (€2.62) per day in purchasing power parity terms, relative to 2019. This is equivalent to five years of progress in eradicating working poverty. In addition, progress in gender inequality in labour market outcomes are also reversed because of the COVID-19 crisis (ILO, 2020a).
[3] These measures include those implemented in Cambodia, Indonesia, Lao PDR, Malaysia, the Philippines, Thailand and Viet Nam.
[4] International Policy Centre for Inclusive Growth. Social Protection Responses to COVID-19 in the Global South Online Dashboard. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 28 May 2021).

social protection response in these countries. An extensive literature has covered COVID-19 labor market impacts in the context of developed countries with widely available data from a variety of sources (e.g., surveys, government administrative data, private sector transactions, and social media and search engine companies).[5] In contrast, literature on the impacts and adjustment processes in developing countries has been relatively scant. Most studies conducted so far have described the evolution of key labor market indicators across regions or country groups (ILO's Monitor Series; ASEAN Secretariat, 2020), but have not closely examined the scale and shape of impacts and adjustment patterns, driven by various contextual and institutional factors at the country level. Moreover, the majority of country-level studies have consisted of rapid assessments using high-frequency phone surveys (e.g., Khamis et al., 2021) or available national sources of labor market information (e.g., ASEAN Secretariat, 2020). In this paper, we use Labor Force Surveys (LFS) to describe the transitions of demographic groups across labor force statuses and within employment. We also decompose working hour losses to assess to which extent intensive and extensive margins of adjustment were used, building upon the ILO's Monitor series.[6] We then explore the factors that may have influenced adjustment patterns at the sectoral level, including the share of 'teleworkable' occupations and the share of wage and salary workers in total employment. Second, while there is a substantial literature and databases taking stock of policy responses of national governments to COVID-19 (e.g., Economic and Social Commission for Asia and the Pacific (ESCAP)-ILO 2021a, ILO 2020c, ASEAN Secretariat 2020, Gentilini et al. 2021, IMF 2021), or focusing on specific aspects of the response (e.g., Beazley et al., 2021), this paper makes a tentative assessment of social response policies implemented across the region by juxtaposing them with the labor market impact and adjustment patterns, and through a comparative analysis of their coverage, adequacy and the extent to which they have sought to fill pre-existing social protection gaps. To our knowledge, there are no other studies that examine the impact of policy responses to COVID-19 in Southeast Asia.

The paper is organized as follows. Section 2 describes the data sources and empirical methods used for the analysis. Section 3 presents a detailed account of the crisis' impact and the labor market adjustment process across Southeast Asia throughout 2020 and the first half of 2021, and identifies the most vulnerable groups that have been disproportionately affected by the crisis. Section 3 is subdivided into four subsections. Section 3.1 presents the impact channels, sectoral effects, and the labor market adjustment in terms of transitions across labor force statuses over time at the aggregate level, and Section 3.2 focuses on demographic groups. Section 3.3 turns to labor reallocation (transitions *within* employment) to identify the extent to which this type of labor market adjustment took place, mitigating net job losses. Section 3.4 discusses the intensive margins of adjustment to the COVID-19 shock by decomposing working hour reductions at the sector level. Section 3.5 explores the differential effects of the pandemic across groups of workers and firms. Section 4 discusses the social protection response policies implemented in the region, juxtaposing them with the impacts discussed in the previous sections. We provide a tentative assessment of policy effectiveness in limiting job and income losses and addressing pre-existing social protection gaps. Three categories of policies are covered: labor market and employment protection (Section 4.1), social assistance (Section 4.2), and social insurance (Section 4.3). The final section concludes with a summary of key takeaways from the analysis and an outline of our future research plans.

[5] This is affirmed by the detailed literature review done by Khamis et al. (2021).
[6] ILO Monitor series presents and updates regional and global estimates of labor market adjustments in terms of workplace closures, reductions in working hour losses, and in labour income losses.

2 Data and Methods

To assess the labor market adjustments in the region, this paper primarily uses Labor Force Survey (LFS) microdata from 2019 to 2020 obtained from national statistics offices (NSOs) for Indonesia, the Philippines, Thailand, and Viet Nam. These data are available on a quarterly basis for the Philippines, Thailand, and Viet Nam, and bi-annually (February and August) for Indonesia. While LFS microdata could not be obtained for Malaysia, the country is nevertheless included in the analysis, relying on published data by the NSO. Data for 2021 are also obtained from NSO websites and publications and from the ILO's ILOSTAT database.[7] Throughout the paper, Quarter 1 (Q1) for the Philippines covers the period November-January, Quarter 2 (Q2) February-April, Quarter 3 (Q3) May-July, and Quarter 4 (Q4) August-October. For Thailand, Malaysia, and Viet Nam, Q1 covers January-March, Q2 April-June, Q3 July-September, and Q4 October-December. Unless otherwise specified, for Indonesia, changes over the period February-August are analyzed in parallel with changes between Q1-Q2 and Q2-Q3 for the other countries. We supplement the analysis with data from various databases compiled by international organizations (e.g., ADB, ILO, IMF, and World Bank).

For our countries with quarterly LFS data, we use pseudo-panels constructed by sex and age cohorts (five-year bands) to follow the progression of demographic groups across labor force statuses (transitions from employment to unemployment, exits from labor force) and transitions within employment (e.g., across industry sectors or status-in-employment). We identify particularly vulnerable/affected groups due to the nature of their work or their working arrangements. This involves disaggregating impacts, whenever possible, by (i) formal/informal employment; (ii) type of work arrangement (e.g., temporary, short-term, daily workers); (iii) occupational group or skill-level; and (iv) enterprise size.[8] We supplement insights from the LFS on employment impacts with data on changes in household incomes from two rounds of the Asian Development Bank Institute (ADBI)'s household surveys in ASEAN countries[9], which provide insights regarding income losses from various sources (wage and salaried employment, self-employment).

We also decompose total working hour losses (see Annex A1) to assess to which extent intensive and extensive margins of adjustment (which refers to the working hour reductions while remaining employed and job losses, respectively) were used at different stages of the crisis. This allows us to examine how the pattern of labor market adjustment has differed across countries and how it differed in relation to previous crises due to various contextual factors (e.g., the spread of the virus, stringency of containment measures, job protection, and other response policies, etc.).

We also examine several factors that may have influenced the adjustment patterns or the relative importance of intensive versus extensive adjustment to the COVID-19 shock across countries and industries. For instance, the possibility of working from home, at least partially, may have helped limit job losses, and other factors (such as wage and salaried workers share firm size

[7] International Labour Organization (ILO). ILOSTAT database [ILOSTAT explorer]. https://www.ilo.org/shinyapps/bulkexplorer32/ (accessed 1 December 2021).

[8] The occupational group/ skill level variable was available for all four countries with LFS. The LFS for Viet Nam allowed us to distinguish between formal and informal employment. The type of working arrangement variable is available in the LFS for the Philippines and for Viet Nam, and an enterprise size variable is included in the LFS for Thailand and for Viet Nam.

[9] The surveys were conducted via telephone due to COVID-19 in eight ASEAN countries: Cambodia, Indonesia, the Lao PDR, Malaysia, Myanmar, the Philippines, Thailand, and Viet Nam. Data collection for round 1 was from early 2020 to the end of June 2020, while round 2 covers early July 2020 to end of December 2020. Due to political unrest, Myanmar was dropped in the conduct of round 2 of the surveys. The survey was designed by ADBI and implemented by five survey companies in these countries. The questionnaires include questions on the characteristics of the households (e.g., number of members, gender, number employed, number in school, age of head of household, education level, urban vs. rural residence, and income, including types of income) and changes in income, employment, and working hours compared with the base period of end-2019, among others.

distribution, wage subsidies, and other policy incentives, among others) may have played a role in determining adjustment patterns at the sectoral level. In line with this, we employ 'teleworkability' indices of occupations (Generalao 2021), which represent the degree to which tasks involved in an occupation can be effectively done from home or offsite, to assess whether the share of 'teleworkable occupations' could be a determining factor in the use of intensive margins of adjustment at the sectoral level. The indices are derived by employing a task-based approach and classifying whether a task of an occupation is considered manual, requires physically assisting and caring for others or to be done outdoors, and can be effectively done with the aid of information, communication and technology (ICT) services and devices.[10] Other factors, such as wage and salaried workers share, firm size distribution, low-skill and temporary employment share, wage subsidies and other policy incentives are also analyzed in terms of its role in determining adjustment patterns.

While data required for a thorough analysis of these issues are not yet available,[11] this paper tentatively explores some of these potential factors based on insights from the LFS. Specifically, for the countries with available quarterly LFS microdata (Viet Nam, Thailand, and the Philippines),[12] we examined the correlation between some of these factors and the intensive margin of adjustment in Q2 2020 at the 2-digit ISIC level. There are 88 2-digit ISIC sectors in the sample, which is the level or unit of observation. Intensive margins are calculated as per Annex A1, wherein negative values are set to zero and values greater than 100% are set to 100. To determine its correlates, we performed correlation and regression analysis as elaborated in Annex A2.

Finally, we consider pre-existing social protection gaps across the selected economies, partly due to the prevalence of informal work (including employment in the informal sector but also informal employment in the formal and household sectors). We use data on legal and effective social protection coverage from the ILO's World Social Protection Report Database[13] and on coverage, adequacy, and incidence to the poorest population segments from the World Bank's Atlas of Social Protection - Indicators of Resilience and Equity (ASPIRE) database.[14] We also take stock of social protection measures implemented across the region, focusing on emergency job protection and income support, and juxtapose these measures with the labor market impacts and adjustment patterns we have identified in our analysis. Although a rigorous assessment of the effectiveness of response policies in protecting jobs and incomes would require more extensive data and sophisticated techniques, we nevertheless provide a tentative assessment of these policies. We do this through a comparative analysis of labor market and employment protection policies, social assistance, and social insurance measures implemented in our sample countries since the onset of the pandemic, using detailed data available from the International Policy Centre for Inclusive Growth (IPC-IG) 'Social Protection Responses to COVID-19 in the Global South' database.[15] In particular, we examine the timeliness and coverage (in terms of share of labor force or population) of the interventions, the adequacy of benefits (e.g., as measured by its share of

[10] The index is scaled from 0 to 1, wherein an occupation with a value of 1 implies that all tasks performed in the occupation can be done entirely at home or offsite while a value of 0 suggests the opposite. An index value between 0 and 1 means that not all tasks of the particular occupation can be performed from home or offsite. See Generalao (in press) for the detailed task classification process and description of the indices.

[11] Data limitations include unavailability of data for micro-, small, and medium-enterprise (MSME) share in employment in the Philippines and temporary employment in Thailand.

[12] Correlations could not be computed for Indonesia, for which employment data by economic activity are not available at the 2-digit ISIC level in the LFS, but only at the 1-digit level.

[13] International Labour Organization (ILO). World Social Protection Database. https://www.social-protection.org/gimi/WSPDB.action?id=32. (accessed 9 November 2021).

[14] World Bank. The Atlas of Social Protection: Indicators of Resilience and Equity. https://databank.worldbank.org/source/1229 (accessed 7 May 2021).

[15] International Policy Centre for Inclusive Growth. Social Protection Responses to COVID-19 in the Global South Online Dashboard. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 28 May 2021).

household income or average wage), and the extent to which they have sought to fill pre-existing social protection gaps, and reach the most vulnerable population segments, including informal workers, working poor, and their households.

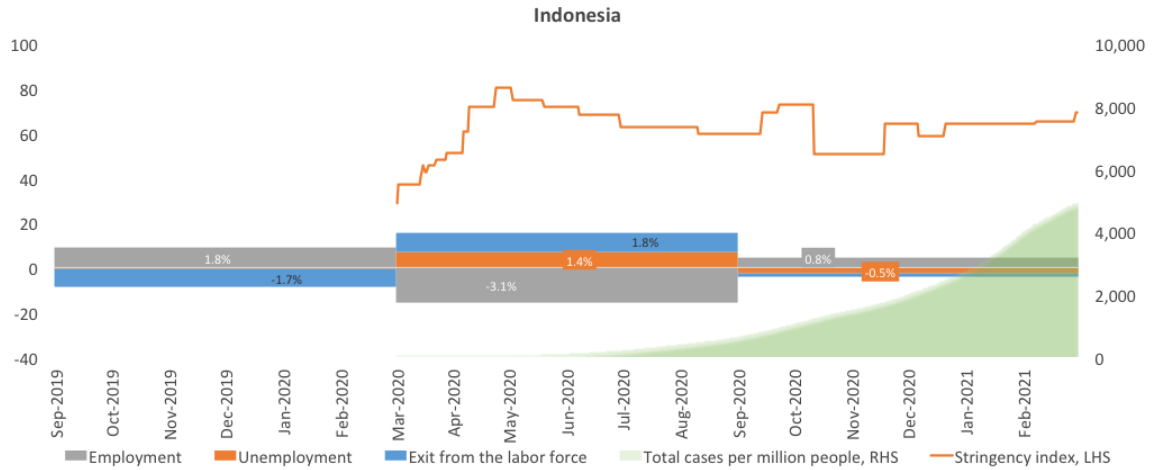
3 Results

3.1 Impact Channels and Aggregate Effects

Although the COVID-19 pandemic affected all countries, the scale and shape of these impacts and corresponding labor market adjustment patterns have differed, driven by various contextual and institutional factors. Among the region's countries, the crisis has been most severe in the Philippines, Malaysia, and Indonesia – at least in its earliest phase–with a period average of over 1,500 COVID-19 cases per million persons in all three countries, between January 2020 and March 2021 (Annex Table 2). During this period, the stringency of containment measures index in these highly impacted countries averaged 71 in the Philippines, 34 in Indonesia, and 62 in Malaysia.[16] Other Southeast Asian countries like Cambodia, Lao PDR, Thailand, and Viet Nam had an average of less than 100 cases per million persons.[17] Among the latter four countries, Viet Nam's stringency index period average (62) was as high as that of Malaysia and Indonesia, while the other countries' average index ranged from 39 to 47.

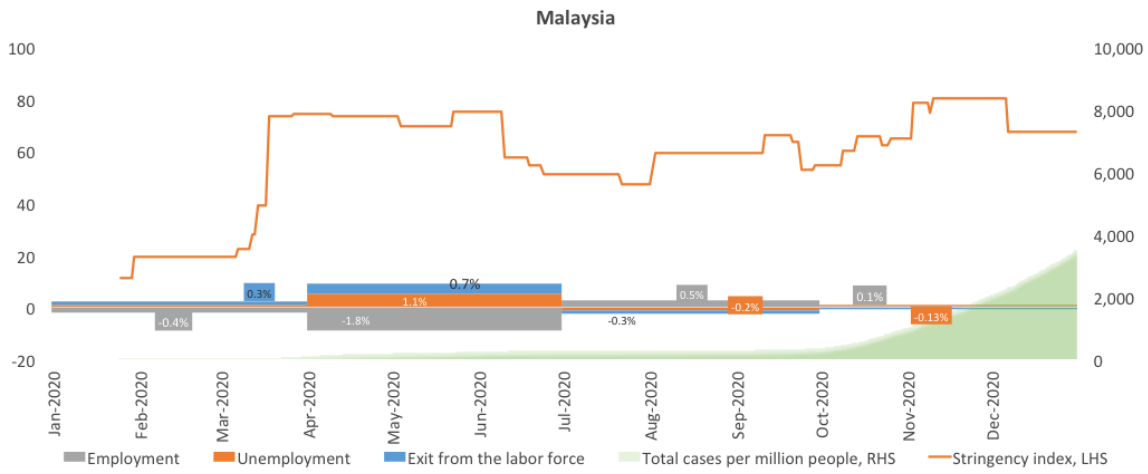
Net transitions out of employment were significant, particularly in Q2 2020. For most countries, job losses and work stoppages were accompanied by significant exits from the labor force. Figure 1 shows the net movements of individuals between employment, unemployment, and in and out of the labor force from January 2020 to January 2021, overlaid with the number of COVID-19 cases and the stringency index.

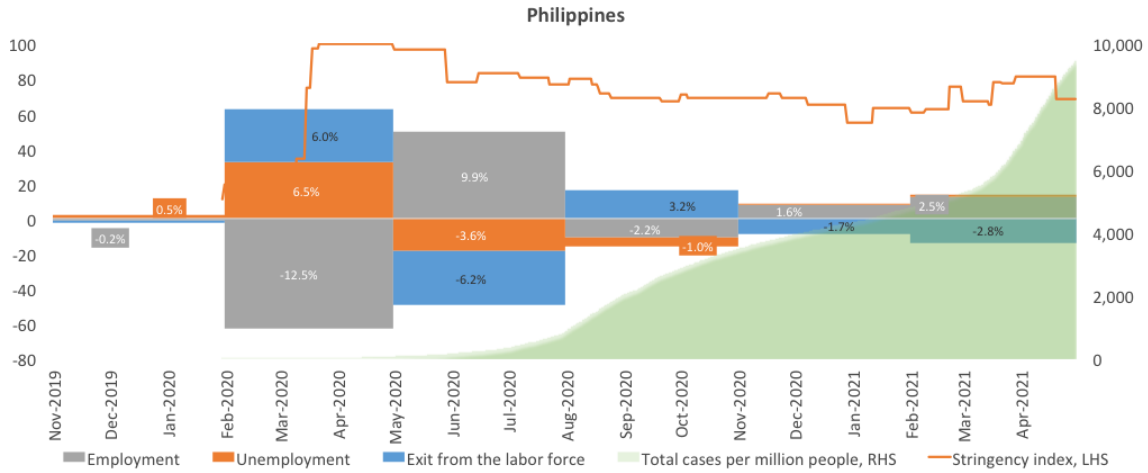
Figure 1. COVID-19 Cases, Stringency of Containment Measures, and Net Labor Market Transitions



[16] The stringency index comes from Oxford University's COVID-19 Government Response Tracker, which measures the stringency of government measures imposed as a response to the COVID-19 outbreak—including school and workplace closures, travel and transport bans, stay-at-home requirements, and restrictions on large gatherings and public events. The value is scaled from 0 to 100 (100 = strictest).

[17] We note that there have been significant spikes in COVID-19 cases in Quarter 2 (Q2) (April to June) 2021 in all countries, particularly in Thailand, Cambodia, and Lao PDR.


Malaysia
100
80
60
40
20
0
-20
10,000
8,000
6,000
4,000
2,000
0
0.3%
0.7%
1.1%
-0.4%
-1.8%
-0.3%
0.5%
-0.2%
0.1%
-0.13%
Jan-2020
Feb-2020
Mar-2020
Apr-2020
May-2020
Jun-2020
Jul-2020
Aug-2020
Sep-2020
Oct-2020
Nov-2020
Dec-2020
Employment
Unemployment
Exit from the labor force
Total cases per million people, RHS
Stringency index, LHS


Philippines
100
80
60
40
20
0
-20
-40
-60
-80
10,000
8,000
6,000
4,000
2,000
0
6.0%
6.5%
9.9%
0.5%
-0.2%
-12.5%
-3.6%
-6.2%
3.2%
-2.2%
-1.0%
1.6%
-1.7%
2.5%
-2.8%
Nov-2019
Dec-2019
Jan-2020
Feb-2020
Mar-2020
Apr-2020
May-2020
Jun-2020
Jul-2020
Aug-2020
Sep-2020
Oct-2020
Nov-2020
Dec-2020
Jan-2021
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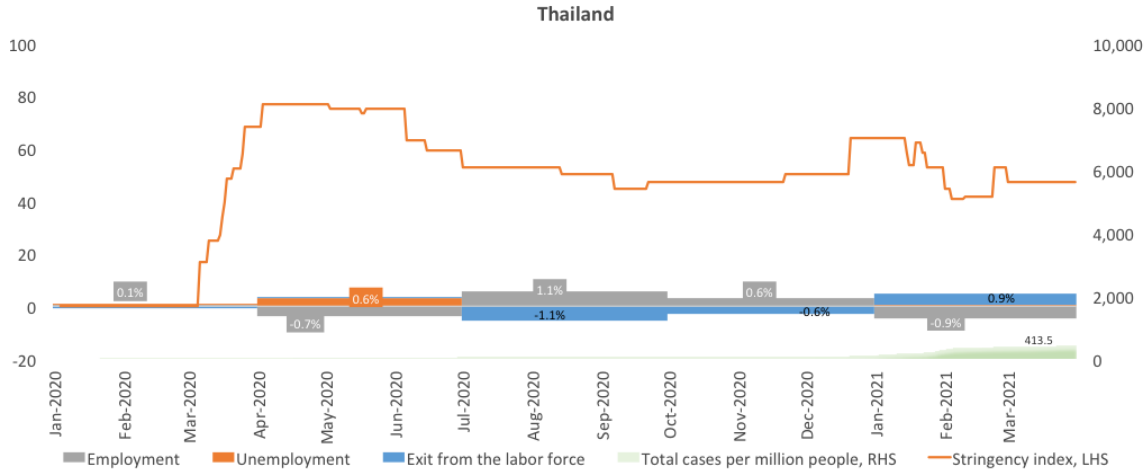
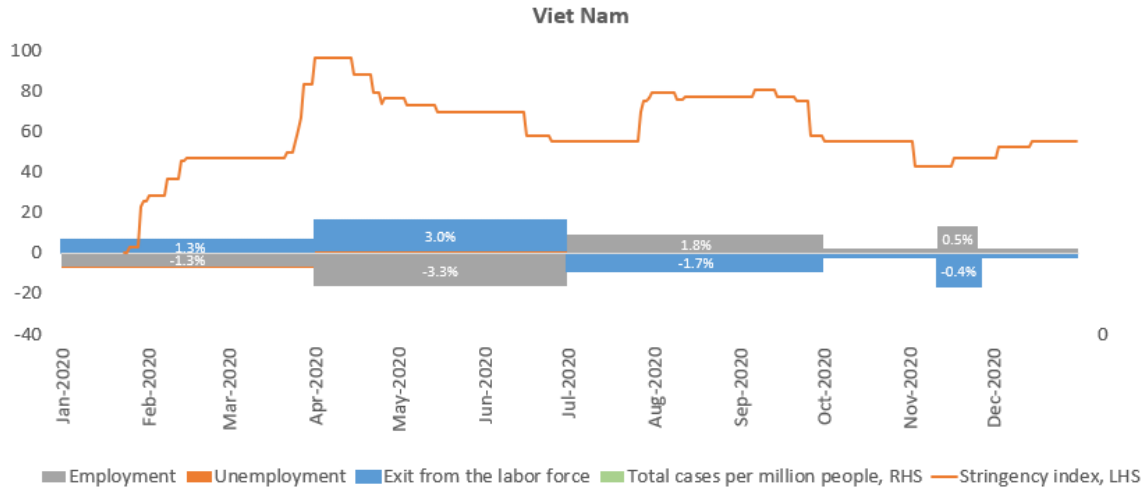
Apr-2021
Employment
Unemployment
Exit from the labor force
Total cases per million people, RHS
Stringency index, LHS


Thailand
100
80
60
40
20
0
-20
10,000
8,000
6,000
4,000
2,000
0
0.1%
0.6%
1.1%
-0.7%
-1.1%
0.6%
-0.6%
0.9%
-0.9%
413.5
Jan-2020
Feb-2020
Mar-2020
Apr-2020
May-2020
Jun-2020
Jul-2020
Aug-2020
Sep-2020
Oct-2020
Nov-2020
Dec-2020
Jan-2021
Feb-2021
Mar-2021
Employment
Unemployment
Exit from the labor force
Total cases per million people, RHS
Stringency index, LHS



Source: Labor force surveys, various countries; Stringency index and COVID-19 cases from Our World in Data. COVID-19 Data Explorer. Retrieved July 09, 2021 from https://ourworldindata.org/coronavirus

The hardest-hit sectors included those affected by supply chain disruptions and a decline in aggregate demand, both domestic and international, those affected by mobility and travel restrictions, and where possibilities of telework were limited. In 2020 Q2, when job losses peaked across the region, manufacturing accounted for the largest share of job losses in Indonesia (with 27%) and Thailand (22%).[18] In Viet Nam, manufacturing accounted for 22% of job losses, but the largest share (46%) was accounted for by agriculture. In all countries, the wholesale and retail trade sector, and the accommodation and restaurants sector also accounted for large shares of job losses. In particular, the wholesale and retail trade sector accounted for nearly a quarter of job losses in the Philippines.

Among our countries, the Philippines has been the most affected country in 2020 by far, both in terms of COVID-19 cases and labor market impacts. In Q2 2020, the highest transition out of employment accompanied the shutdown of all non-essential businesses beginning mid-March until the end of May 2020. One out of 5 workers (equivalent to 12.5% of the working population) transitioned out of employment, of which 6.5% went into unemployment, and another 6% exited the labor force. This translates into around 9.2 million workers leaving employment, with 4.8 million moving into unemployment and 4.2 million leaving the labor force. The unemployment rate shot up from 5.3% in Q1-2020 to 17.6% in Q2, and the labor force participation rate declined by 6 percentage points during the same period (Table 1).

Table 1. Key Labor Market Indicators

	Indonesia			Malaysia			Philippines			Thailand			Vietnam		
	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR
Q1 2019	65.8	5.0	69.3				57.0	5.2	60.2	67.1	0.9	67.8	69.1	2.1	70.6
Q2 2019							58.2	5.1	61.4	67.1	1.0	67.8	68.8	2.0	70.2
Q3 2019	64.0	5.2	67.5				58.7	5.4	62.1	66.3	1.0	67.0	68.5	2.0	69.9
Q4 2019				66.8	3.2	69.1	58.7	4.5	61.5	66.3	1.0	66.9	69.2	2.0	70.6
Q1 2020	65.8	4.9	69.2	66.4	3.5	68.8	58.4	5.3	61.7	66.4	1.0	67.1	67.6	2.1	69.1
Q2 2020				64.6	5.1	68.1	45.9	17.6	55.7	65.7	2.0	67.0	64.9	2.6	66.6
Q3 2020	63.0	7.1	67.8	65.2	4.7	68.4	55.8	10.0	61.9	67.3	1.9	68.6	67.2	2.5	68.9
Q4 2020				65.2	4.8	68.5	53.6	8.7	58.7	66.7	1.9	68.0	68.0	2.4	69.7
Q1 2021	63.6	3.9	66.1	65.3	4.8	68.6	55.2	8.7	60.5	65.9	1.4	66.9	66.8	2.1	68.2
Q2 2021													66.5	2.4	68.1

EPR = employment-to-population ratio, LFPR = labor force participation rate, Q = quarter, UR = unemployment rate.
Notes: The working population in Malaysia is 15–64 years old; in other countries, it is 15+ years old. For Indonesia, Q4 2019 is August 2019; Q1 2020 is February 2020; Q3 2020 is August 2020; Q1 2021 is February 2021. Data for Viet Nam in this table are based on

[18] Manufacturing was hit hard across the region. In Cambodia, for instance, the sector is estimated to have accounted for approximately 25% of employment losses (ADB 2020).

the new standard definition of employment, consistently with the International Conference of Labour Statisticians 2019 (ICLS 2019) recommendation.
Source: Labor force survey of various countries.

Thailand, among the region's countries with LFS, was the least affected in terms of employment losses, with only 0.7% of the working-age population exiting employment in Q2 2020. In net terms, only 14% of those who lost their jobs in Thailand exited the labor force, leaving the labor force participation rate (LFPR) relatively unaffected (a 0.1 percentage point decrease only). As a result, the unemployment rate doubled from 1.0% in Q1 2020 to 2.0% in Q2 2020.

In Malaysia, job losses had started in the first quarter of 2020, but the second quarter registered the most significant exits from employment, equivalent to 1.8% of the working-age population. Among workers who lost their jobs, 40% exited the labor force, and 60% became unemployed, raising the unemployment rate from 3.5% in Q1 2020 to 5.1% in Q2 2020.

In Indonesia, 3.1% of the working-age population (in net terms) transitioned out of employment between February and August 2020. Out of these workers, 56% exited the labor force, and the rest became unemployed, bringing the unemployment rate up from 5.0% in Q1 2020 to 7.1% in Q3 2020.

In Viet Nam, the pandemic had been more successfully contained than in the Philippines. However, strict measures and other factors, including a decline in global demand, nevertheless resulted in employment losses. Job losses in Viet Nam also peaked in Q2 2020, with 2.4 million or 3.3% of the working-age population. Out of these workers, only around 220,000 (or 0.3% of the working-age population) joined the ranks of the unemployed, while the rest exited the labor force (as much as 91% of net job losses).

In Q3 2020, however, the easing of containment measures led to many of those who had exited re-entering the labor force, mainly transitioning into employment but with some becoming unemployed. Figure 1 shows a significant difference in the size of the outflows from employment in the early phase of the pandemic compared to the inflows seen during the "reopening" of the economy. In the Philippines, 9.9% of the working-age population moved back into employment, with 3.6% comprising people who moved out of unemployment into employment and another 6.2% making up those reentering the labor force (in net terms). Likewise, in Malaysia and Viet Nam, inflows back into employment in Q3 2020 fell short of the previous quarter's exits from employment and the employment-to-population ratio (EPR) and LFPR remained below their pre-pandemic (Q4 2019) levels. In Thailand, however, the number of those entering the labor force in the third quarter of 2020 exceeded those who had exited the labor force in the previous quarter, suggesting an added worker effect.

Restrictions continued to ease up in Q4 2020, and the year closed off with some countries having successfully contained the pandemic for most of the year.[6] Thus, in Q4 2020, a movement out of employment was observed only in the Philippines (2.2% of the working-age population) but to a lesser degree than the Q2 peak. In all countries, the unemployment rate had declined from its peak in Q2 but remained above its pre-crisis level, and the employment-to-population ratio below its pre-crisis level, throughout 2020.

In 2021, recovery prospects in Southeast Asia suffered a major blowback, with the numbers of COVID-19 cases rising exponentially in many countries of the region, as the Delta variant of the virus wreaked havoc against a backdrop of slow vaccine rollout. In Q1 2020, the EPR and LFPR increased in the Philippines, and very slightly in Malaysia, as the unemployment rate stayed constant in both countries (Table 1). In Indonesia, the unemployment rate declined in Q1 2021,

as many unemployed exited the labor force, bringing labor force participation to its lowest point since the onset of the crisis. In Thailand and Viet Nam, however, Q1 2021 saw a decline in both employment and labor force participation rates. The unemployment rate declined as well in both countries, however, as many unemployed exited the labor force once again. In Viet Nam, the only country in our sample for which Q2 2021 data are available, the employment-to-population ratio declined further and the unemployment rate climbed back up in that quarter.

From September to October 2021, the number of new cases has trended downward and vaccination campaigns have accelerated, but coverage remains low with the notable exception of Malaysia. Although labor force survey data for the second half of 2021 are still unavailable, it is clear that labor market recovery, the prospects of which had seemed favorable by the end of 2020 in the region, suffered a major setback in 2021.

3.2 Transitions Across Labor Force Statuses by Age and Sex Cohorts

Using pseudo panels constructed by sex and five-year age bands, we find that across our countries, all age and sex cohorts experienced a movement out of employment into unemployment and out of the labor force in Q2 2020 (Figure 2). Moreover, in all countries of the region, youth were heavily affected due to higher-than-average workforce representation in hard-hit sectors and also because they were disproportionately affected by job cuts in these sectors (Figure 3). This is because young workers often have less experience and are less likely to have permanent contract arrangements, which makes them the first to be let go during the crisis (ILO 2020d). Youth (aged 15-24) accounted for 22-28% of total job losses in Q2 2020 in Indonesia, Thailand, and the Philippines, while only representing 10-15% of total employment in these three countries in Q4 2019 (Figure 3). In Viet Nam, youth accounted for as much as 45% of job losses in Q2 2020, despite representing only 12% of total employment in Q4 2019.

Transitions into unemployment were more significant among youth cohorts than adult cohorts across all countries except Viet Nam. In Viet Nam, in the three youngest age cohorts, net transitions from employment out of the labor force were accompanied by transitions from unemployment out of the labor force as well. As a result, the female youth unemployment rate actually declined in Q2 2020 in Viet Nam (Annex Table 3).

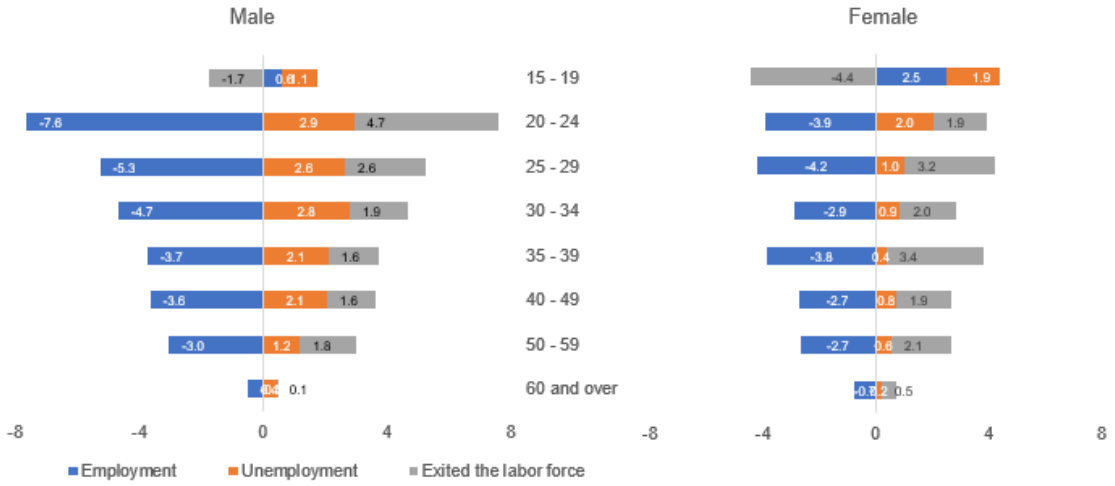
In some countries, the recovery of employment for youth also lagged behind that of adults. For instance, in Malaysia, the youth employment-to-population ratio (EPR) and labor force participation rate (LFPR) continued to decline in Q3 2020, while the corresponding rates increased for adults (Annex Table 3). In Viet Nam, while the adult EPR and LFPR had partially recovered by Q4 2020, the youth EPR and LFPR continued to decline throughout 2020 and the first half of 2021. By Q2 2021, the youth EPR in Viet Nam stood at 39.9%, more than 12 percentage points below its pre-crisis (Q4 2019) level, and the youth unemployment rate had reached the highest point since the onset of the pandemic. In Thailand as well, youth continued to be heavily affected in Q1 2021, with the youth EPR declining by as much as 2.9 percentage points, compared to 1.1 percentage points for adults (Annex Table 3).

For young labor market entrants, and young workers hoping to move up their career ladder, the crisis may have substantially hampered these important transitions, with potential longer-term implications in terms of 'scarring' (ILO 2020d).[19]

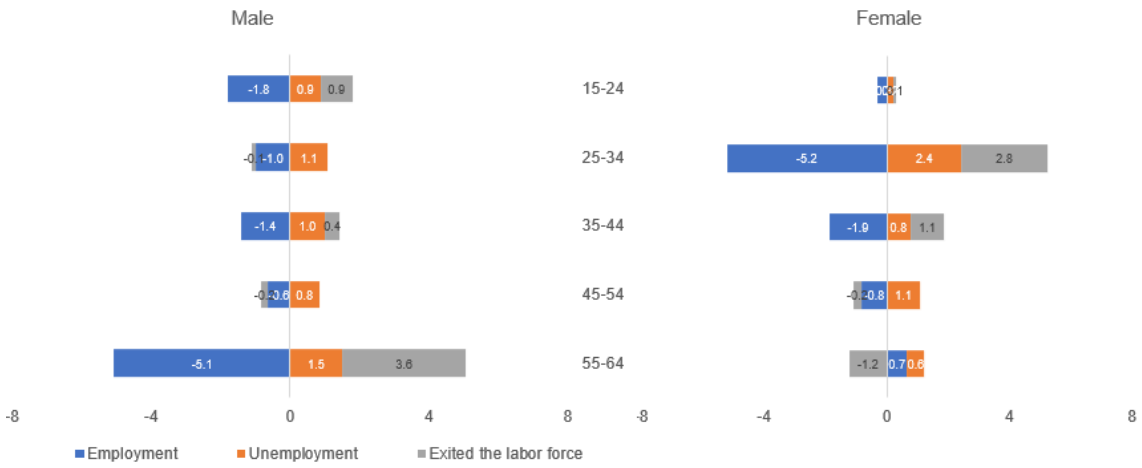
[19] In particular, prolonged spells of unemployment early on in a worker's career risk having longer-term impacts on their future employments and earning prospects.

Figure 2. Net Transitions across Labor Force Statuses by Age and Sex Cohort, Q2 2020

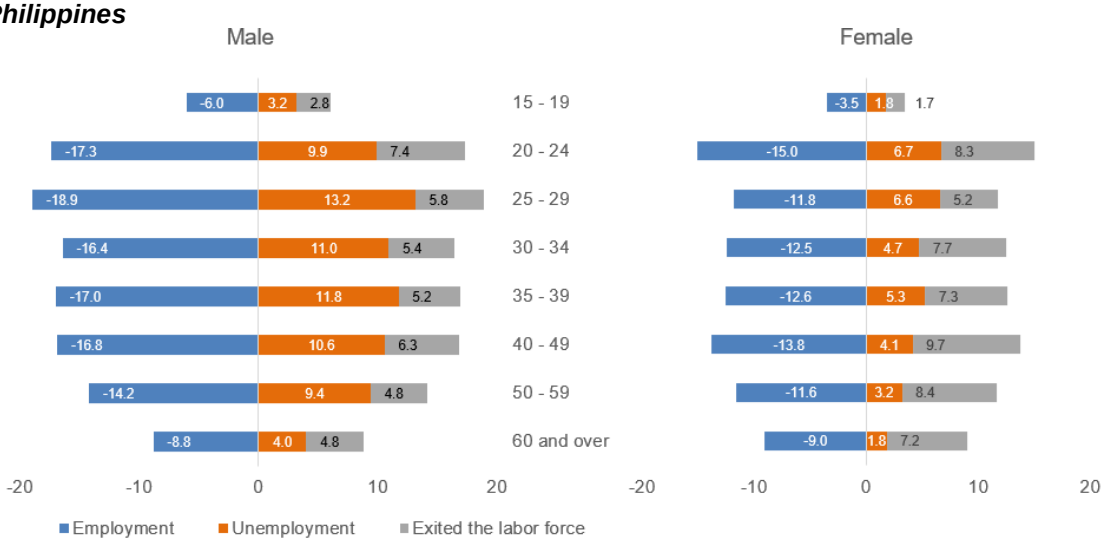
Indonesia



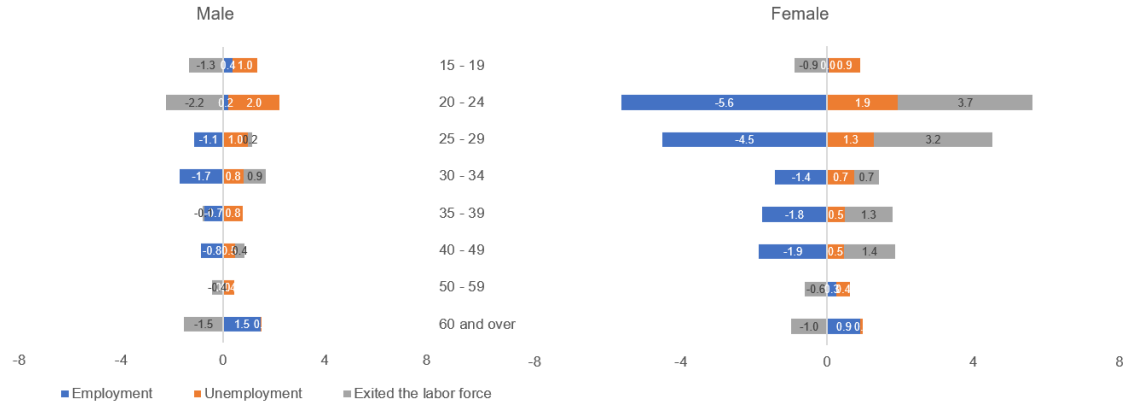
Malaysia



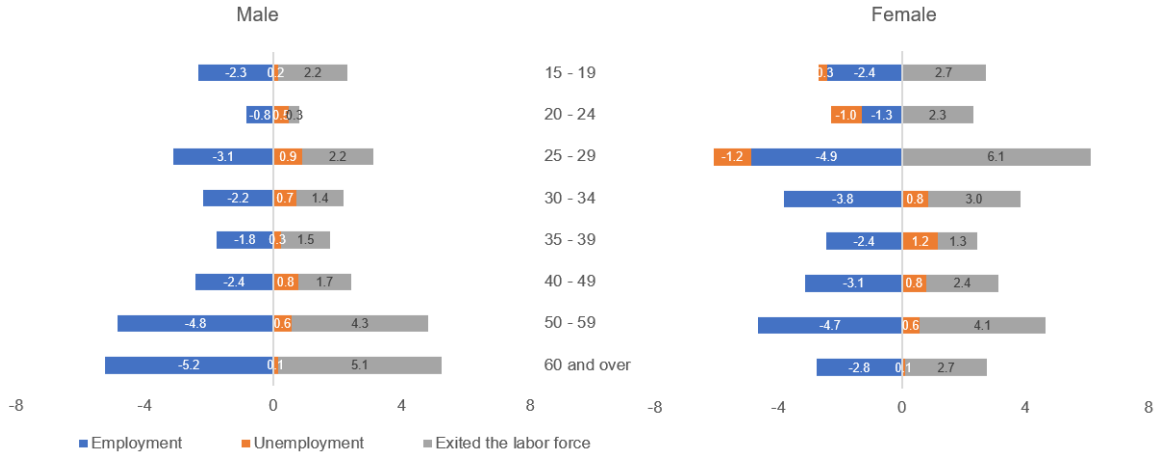
Philippines



Thailand

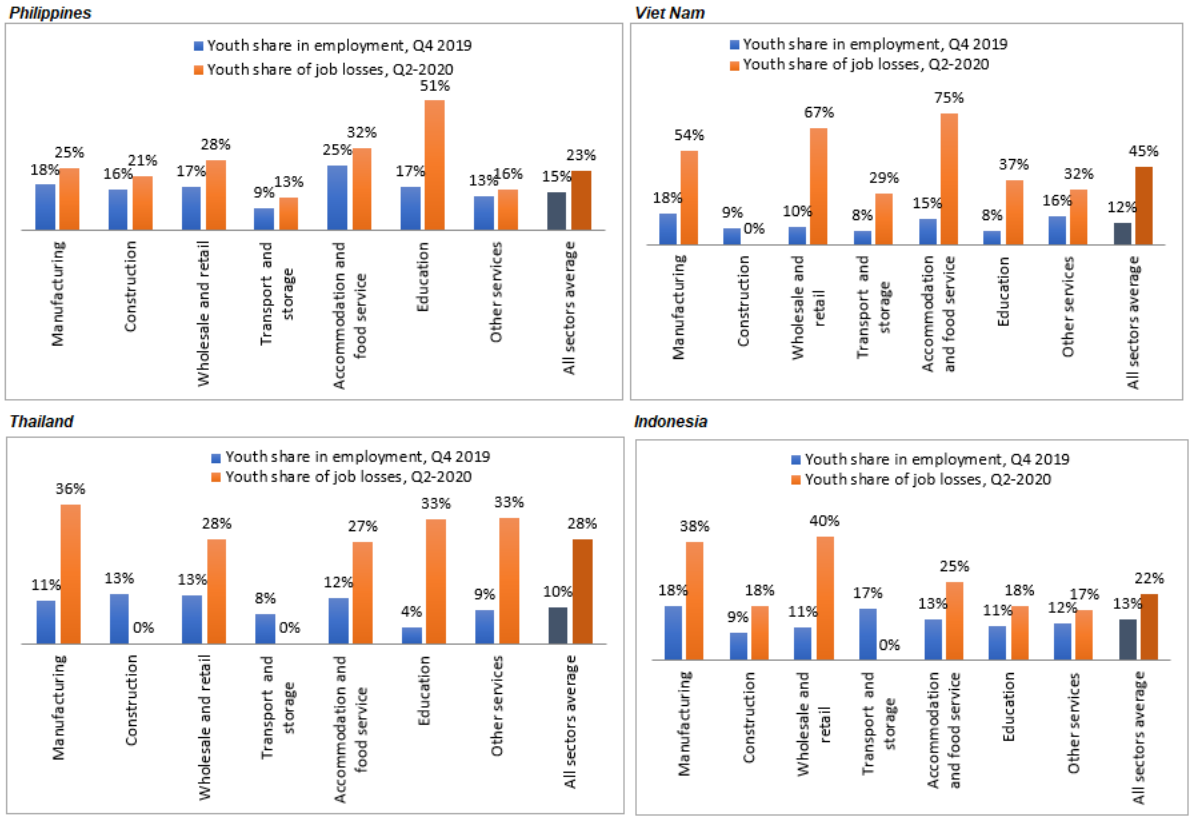


Viet Nam



Note: Data for Indonesia refer to the period March–August 2020.
Source: Authors' estimates based on labor force surveys of various countries.

Figure 3. Share of Youth in Sectoral Employment and in Net Job Losses, Q2 2020



Notes: Shares in employment refer to August 2019 for Indonesia and Q4 2020 for other countries. Youth shares in job losses refer to February–August 2020 for Indonesia and Q1–Q2 2020 for other countries.
Source: Authors' estimates based on labor force surveys of various countries.

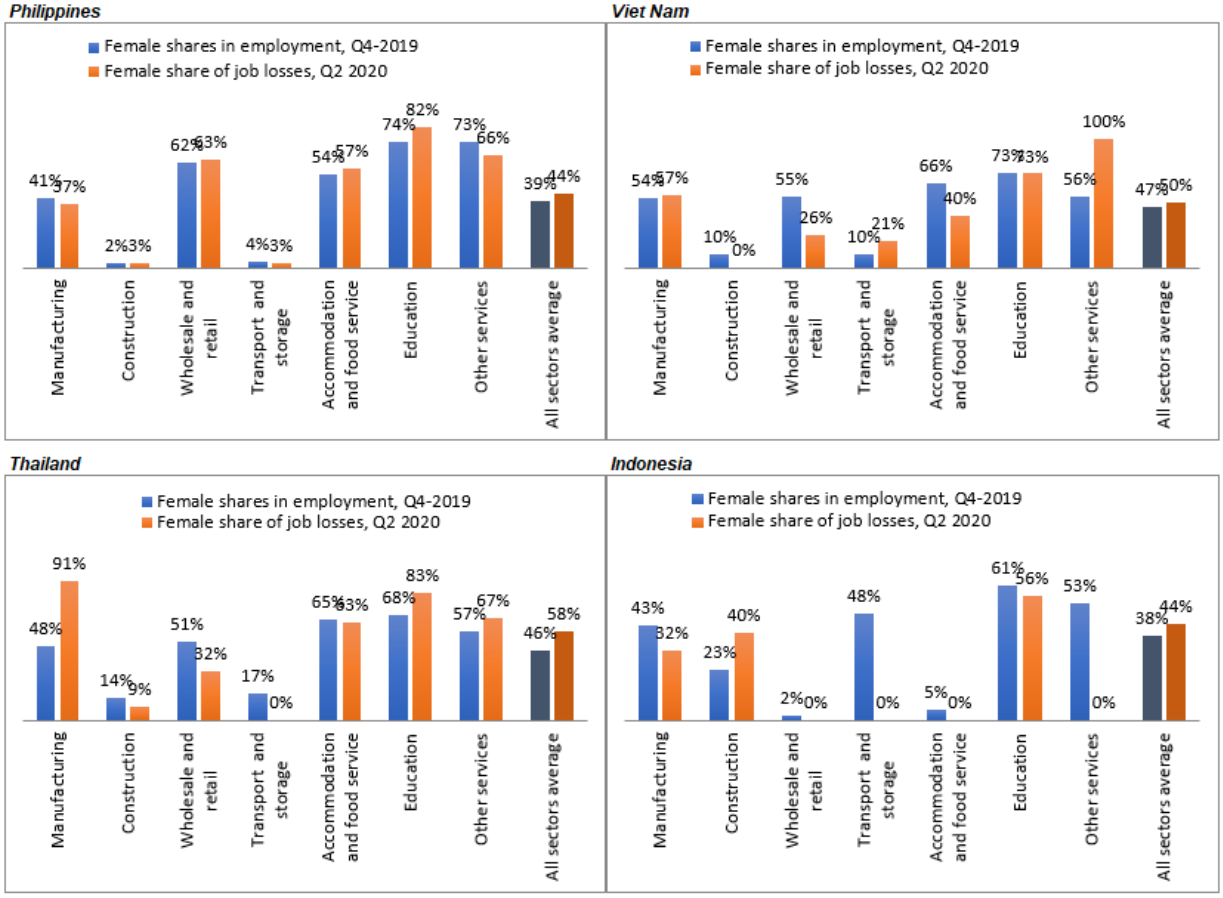
Women were disproportionately affected as well, recording a greater share in job losses than their share in employment. In Indonesia and the Philippines, women represented 38%-39% of the workforce in Q4 2019 and accounted for 44% of job losses in Q2 2020 (Figure 4). In Viet Nam, they represented 47% of the workforce and accounted for half of the net job losses. In Thailand, women represented 47% of the workforce and accounted for as much as 58% of job losses. In particular, women in Thailand accounted for 91% of job losses in manufacturing. In Viet Nam, the female share in job losses was higher than the female share in employment in manufacturing, financial intermediation and insurance, administrative and support services, human health, and other service activities.[20] In the Philippines, this was the case in agriculture, accommodation and food services, administrative and support services, public administration, and education.

One common feature of labor market adjustment to the COVID-19 shock across our sample countries is that more females moved into inactivity following job loss while more males moved into unemployment. The massive labor force exits among women are largely due to a greater share of the care burden (including childcare and homeschooling, and caring for ill relatives) falling on women, as has been observed across the world (ILO, 2021a). This was true for all age cohorts in the Philippines and nearly all cohorts in the other countries (Figure 2).

[20] The manufacturing sector accounted for approximately 38% of net wage employment losses for women in Q2-2020 in Viet Nam (compared to 28% for men).

In countries where women are far less likely to participate in the labor market than men, greater labor market detachment among women can be particularly harmful if it lasts, as seemingly temporary disruptions to the working lives of women can have longer-lasting consequences.[21]

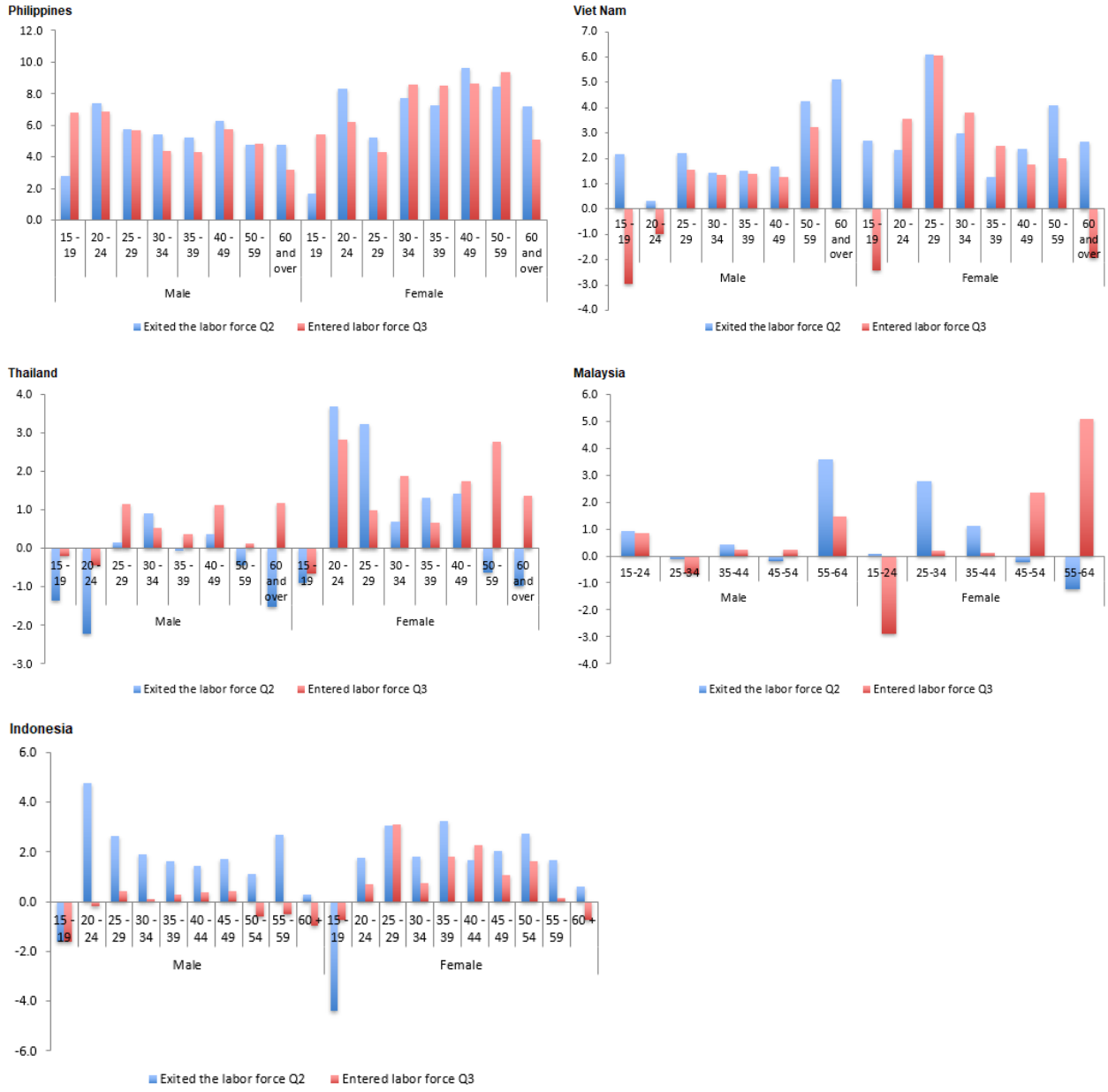
Figure 4. Share of Females in Employment and in Net Job Losses, Q2 2020



Notes: Shares in employment refer to August 2019 for Indonesia and Q4 2020 for other countries. The female share in job losses refer to March–August 2020 for Indonesia and Q1–Q2 2020 for other countries.
Source: Authors' estimates based on labor force surveys of various countries.

[21] When a working-age person is not employed, they must be actively seeking and available to take up employment to be considered unemployed, as per the ILO definition. However, some persons may not be actively seeking employment although they are available to work, and others may be actively seeking work but not immediately available to work. The two latter categories of individuals are referred to as "potential labor force (PLF)" and are considered to have a stronger degree of labor market attachment, than other persons outside the labor force (Benes and Walsh 2018; De La Fuente 2011). Therefore, in this context, increased labor market detachment can be considered as a shift from unemployment or from the PLF to the category of persons who are neither seeking work nor available to work for various reasons.

Figure 5. Labor Force Exits in Q2 2020 and Reentries in Q3 2020, by Sex



Notes: The exits from the labor force period refer to March–August 2020 for Indonesia and Q1–Q2 2020 for other countries. The reentries into the labor force period correspond to September 2020–February 2021 for Indonesia and Q3–Q4 2020 for other countries.
Source: Authors' estimates based on labor force surveys of various countries.

Is there evidence of more detachment among women? Examining transitions in and out of the labor force for different age and sex cohorts revealed that, in general, women were indeed more likely than men to exit the labor force. However, these women were quicker to reenter the labor market in Q3 2020 than men. This may reflect a faster rebound of informal employment in comparison with formal wage employment (see section 2.3). Specifically, women who exited the labor force in Q2 2020 were more likely to reenter the labor market than men in Q3 2020 for all age cohorts in Indonesia, for 6 out of 8 cohorts in Thailand and Viet Nam, for 5 out of 8 cohorts (all cohorts over the age of 30) in the Philippines, and for 3 out of 5 cohorts in Malaysia (Figure 5). There also seems to be an "added-worker effect" in which additional women workers join the

labor force to compensate for the lost jobs and income of other household members. These reentries into the labor force in Q3 were not only commensurate with, but actually surpassed, the women's exits in the previous quarter, as observed for many cohorts in Viet Nam, the Philippines, and Thailand. In Malaysia, the Philippines and Thailand in particular, the Q3 2020 rebound in labor force participation rate was significant, particularly among adult women, bringing the their LFPR back up above precrisis levels (Annex Table 3). The higher rebound in female labor force participation (relative to men) and the added-worker effect suggest that employment created during the recovery period could be of lower "quality" than employment lost due to the crisis. As of Q1 2021, the EPR and LFPR of adult women in Indonesia, Malaysia, the Philippines and Thailand had surpassed their precrisis levels, while the corresponding rates for men remained well below their precrisis levels (Annex Table 3). In Viet Nam, both male and female EPRs and LFPRs had fallen back below their respective precrisis levels in Q2 2021.

3.3 Transition within Employment: Labor Reallocation and Sectoral Effects

In developing country contexts, the labor force participation rate is often high, and the unemployment rate relatively low, as most working-age persons cannot afford to be out of employment. Thus, in response to an economic crisis or shock, labor market adjustment primarily consists of labor reallocation—shifts within employment, across economic sectors, across status-in-employment, or from formal to informal employment. The COVID-19 shock was unprecedented in these economies, partly because lockdown and other containment measures heavily affected sectors that usually absorb displaced workers and prevented reallocation to these sectors.[22] For instance, wholesale and retail trade, accommodation and food services, construction, transport and storage, 'other services', and even agriculture–sectors with high informality rates, that usually absorb displaced labor from other sectors, accounted for 75% of the 8.7 million job losses in Q2 2020 in the Philippines, 65% of the 2.4 million job losses in Viet Nam, and 51% of the 1.1 million job losses in Thailand (Table 2).[23] In Indonesia, taking into account seasonal effects, employment in these sectors remained below precrisis levels, despite absorbing some of the displaced labor from manufacturing and other hard-hit sectors between February and August 2020 (Table 2, Figure 6). It is important to note that the February–August 2020 time period includes several months of de-confinement and overlaps with both Q2 and Q3 for other countries with LFS data. During this period in Indonesia, a decline in employment for wage and salaried workers (–10.5%) and employers (–8.3%) was partially offset by an increase in own-account work (11.4%) and unpaid family work (6.2%).

In the other countries, some labor reallocation took place in Q3 2020 as the economy 'reopened' and mobility restrictions were partially lifted. Movements into own-account work and unpaid family work explained much of the rebound in employment. This reflects a lag in the recovery of formal employment because of firm closures during the crisis, demand remaining depressed in sectors such as tourism, and continued uncertainty, which limit rehiring and investment. As a result, the COVID-19 crisis hampered the quality of work in these countries.

[22] In comparison to the labor market shock of the Global Financial Crisis (GFC), the employment-to-population rates of these Southeast Asian countries (e.g., Indonesia, Philippines, Thailand, and Malaysia) declined by 0.3 to 1.0 percentage point in 2009 relative to 2008. Also, there were slight increases in unemployment rates for some countries (e.g., Philippines, Thailand, and Malaysia), which ranged from 0.1 to 0.3 percentage point.

[23] In Thailand, although there was an increase in agriculture employment in Q2 2020, this follows an important decline in the previous quarter, and is largely attributable to seasonal effects (similar quarterly employment patterns can be observed in 2019). It is likely nevertheless that some of the agriculture job growth in 2020 Q2 consisted of displaced workers from other sections. Indeed, although net agricultural employment growth was positive in the sector in Q2, a shift can be observed from wage and salaried work to own account and contributing family work within the sector.

Table 2. Job Losses by Sector, Q2 2020 versus Q1 2020

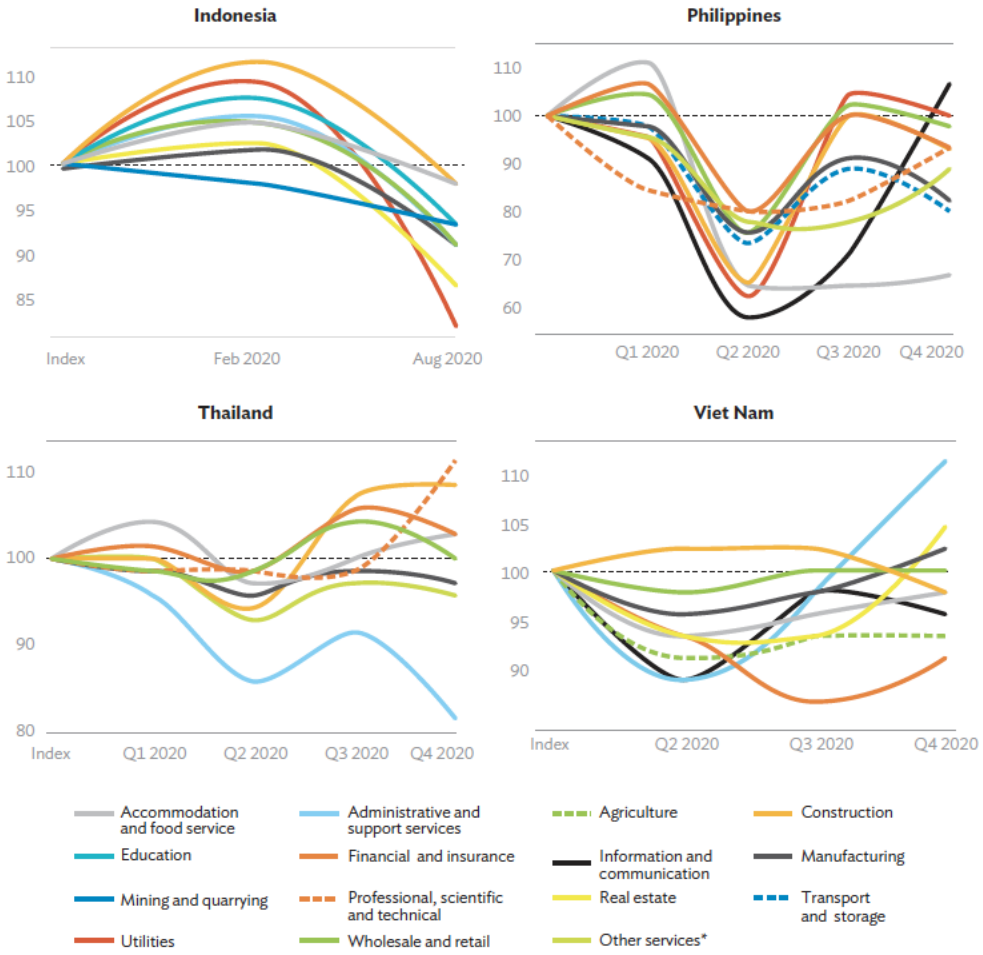
	Philippines		Thailand		Indonesia		Viet Nam	
	Net change in the number of employed ('000s)	Sector share in gross job losses (%)	Net change in the number of employed ('000s)	Sector share in gross job losses (%)	Net change in the number of employed ('000s)	Sector share in gross job losses (%)	Net change in the number of employed ('000s)	Sector share in gross job losses (%)
Agriculture	-864	10%	710		178		-1,126	46%
Mining and quarrying	-30	0%	7		10		-2	0%
Manufacturing	-936	11%	-237	22%	-976	27%	-525	22%
Utilities	-60	1%	-8	1%	-37	1%	-1	0%
Construction	-1,210	14%	-115	11%	36		30	
Wholesale and retail	-2,131	24%	-154	14%	98		-153	6%
Transport and storage	-805	9%	-32	3%	289		-97	4%
Accommodation and food service	-778	9%	-123	11%	176		-154	6%
Information and communication	-105	1%	8		-409	11%	-38	2%
Financial and insurance	-189	2%	-36	3%	-13	0%	-46	2%
Real estate	-48	1%	-23	2%	-233	6%	-44	2%
Professional, scientific and t	-37	0%	-22	2%	-28	1%	-24	1%
Administrative and support ser	-162	2%	-68	6%	-11	0%	-67	3%
Public administration	-304	3%	11		-762	21%	2	
Education	-207	2%	-84	8%	-967	27%	-99	4%
Human health and social work	-106	1%	-48	4%	-173	5%	-5	0%
Other services*	-741	9%	-128	12%	252		-54	2%
Net change	*-8,713*		*-343*		*-2,570*		*-2,402*	
Gross job losses	*-8,713*		-1,079		*-3,608*		*-2,434*	

Note: * Other services sector includes employment in: arts, entertainment and recreation; other service activities; and activities of households as employers.
Source: Authors' estimates based on labor force survey.

In Viet Nam, for example, wage employment represented 47% of net job gains in Q3 2020, with own-account work representing the remaining 53% (Annex Table 4). Most of the job gains (89%) consisted of informal employment, with agriculture jobs recovering from the major losses in Q2, and the wholesale and retail trade absorbing much of the displaced labor from other sectors.[24] Taking into account seasonal effects, employment in agriculture and in accommodation and food services remained below precrisis levels at least through Q4 2020 (Figure 6). The construction sector also absorbed many displaced (male) workers in Q3 into wage employment. In Viet Nam, manufacturing and several key service industries saw a rebound in employment in Q4 2020 (Figure 6), and formal employment recovered, accounting for 85% of net job gains in that quarter. The last quarter of 2020 was marked by a shift back from self-employment to wage and salaried work, as many workers transitioned back from agriculture to the industry and services sectors.

[24] Authors' calculations from quarterly LFS data.

Figure 6: Employment throughout 2020, Selected Industries
(Index, same quarter previous year = 100)



Notes: Employment index, corresponding quarter of 2019 = 100, to control for seasonality.
*Other services includes the following ISIC Rev 4. categories: R. Arts, entertainment and recreation, S. Other service Activities, T. Activities of households as employers; undifferentiated goods- and services- producing activities of households for own use; U. Activities of extraterritorial organizations and bodies.
Source: Labor force surveys of various countries.

In Thailand, most of the job gains in Q3 2020 consisted in own-account and contributing family work in agriculture (Annex Table 4). The manufacturing sector, which was the most affected in Q2 2020, continued to shed jobs in Q3, with even more job losses than the previous quarter. In both Q2 and Q3, most manufacturing job losses in Thailand consisted of wage and salaried employment, with larger firms—more likely to be export-oriented—being more heavily affected due to the decline in global demand. Despite some employment growth in Q4 2020, manufacturing employment remained below precrisis levels in Thailand (Figure 6). Employment in the badly hit tourism sector (proxied by accommodation and food services) in Q2 2020 recovered in Q3 2020 as economic activities resumed. In Q3, however, wage employment accounted for less than a quarter (24%) of the job gains in restaurants and accommodation, particularly in small and medium-sized enterprises, while the sector's larger establishments that rely more on global demand continued to shed jobs through Q3. In the last quarter of 2020, wage

and salary work increased, particularly in sectors that were most affected in Q2, such as manufacturing, wholesale and retail trade, and education. The accommodation and food services sector continued shedding wage and salaried jobs in Q4, but posted overall employment gains as more workers moved toward self-employment (Annex Table 4, Figure 6). The slower recovery of wage employment in the tourism sector may be partly due to international demand remaining significantly curtailed as many western countries struggled with the second wave of the virus.

In the Philippines, in Q3 2020, we saw a rebound in employment in agriculture, mining and quarrying, construction and wholesale and retail that matched or was higher than the job losses in Q2. Job gains in Q3 2020 were accounted for by a rise in self-employment and unpaid family work (Annex Table 4). In particular, self-employment and unpaid family work in wholesale and retail trade accounted for around 24% of the total job gains in this period. In the last quarter of 2020, the Philippines posted a net job loss of around 1.5 million, tempered by the labor reallocation towards agriculture.

In sum, although the second half of 2020 saw a rebound in employment in our sample countries, job gains consisted primarily of own-account and unpaid family work rather than more formal types of employment. Labor reallocation towards lower productivity sectors took place, whereby these sectors absorbed some of the workers who were displaced in Q2 (labor market re-entrants) in addition to new entrants who may have otherwise had more productive employment opportunities.

3.4 Intensive Margins of Adjustment: Working Hour Reductions

The previous sections discussed the extensive margins of labor market adjustment to the COVID-19 shock, specifically employment losses resulting in shifts across labor force status, and labor reallocation or shifts within employment. Job losses underestimate the employment impact of the pandemic, however, due to significant reductions in working time. Specifically, those still employed worked less hours or no hours at all, as firms limited operations and resorted to intensive margins of adjustment to preserve employment relationships, and as self-employed workers abided by curfews, lockdowns, and other constraints on their activities.

Table 3. Decomposition of Working-Hour Losses, Q2 2020 – Intensive Margin of Adjustment (%)

	Indonesia*	Philippines	Viet Nam	Thailand
Agriculture	37.1	65.3	0	0
Mining and quarrying	100.0	63.9	100	0
Manufacturing	51.6	65.4	0	0
Utilities	24.9	47.0	100	0
Construction	31.6	64.2	91	57.2
Wholesale and retail	84.4	55.2	66	69.0
Transport and storage	93.7	72.3	71	78.8
Accommodation and food service	100.0	55.8	69	81.2
Information and communication	50.5	59.9	0	0
Financial and insurance	0.0	58.4	0	0
Real estate	27.5	68.7	0	0

Professional, scientific and technical	60.6	79.9	0	16.8
Administrative and support service	80.6	80.4	24	47.2
Public administration	22.1	36.9	98	85.2
Education	54.4	80.3	0	77.2
Human health and social work	24.0	54.2	100	30.3
Other services	100.0	58.6	78	67.7

* For Indonesia, working-hour decline refers to the period from February to August 2020.
Source: Authors' calculations based on labor force surveys of various countries.

In the Philippines, intensive margins of adjustment accounted for the majority of working-hour losses in Q2 2020 in all sectors except in utilities and public administration (Table 3). In Indonesia as well, extensive margins dominated in these two sectors, as well as in agriculture, construction, finance and real estate, and human health and social services. In Thailand and Viet Nam, in several sectors—including agriculture, manufacturing, information and communication, real estate, professional, scientific and technical activities, administrative and support services, and education—firms were more likely to resort to extensive margins. But aggregate-level and broad sector-level trends hide significant heterogeneity across industries. At a more disaggregated level (2-digit International Standard Industrial Classification [ISIC]), intensive margins of adjustment accounted for the majority of Q2 2020 working-hour losses in 70% industries in the Philippines, approximately half of industries in Thailand, and one quarter in Viet Nam.[25] In all three countries with available LFS microdata for Q3 2020 (in the Philippines, Thailand, and Viet Nam), a rebound in working hours resulted mainly from the increased working hours of those still employed. Working hours recovered in many sectors but remained well below the pre-pandemic levels.

Several factors may have influenced the adjustment patterns or the relative importance of intensive versus extensive adjustment to the COVID-19 shock across countries and industries. For instance, the possibility of working from home, at least partially, may have helped limit job losses, and other factors (such as wage and salaried workers share firm size distribution, wage subsidies, and other policy incentives, among others) may have played a role in determining adjustment patterns at the sectoral level.

In the Philippines, the sectors in which intensive margins accounted for the highest shares of adjustment included those with large shares of teleworkable occupations (e.g., education, professional, scientific and technical activities, administration and support services, and real estate), while some sectors with relatively low teleworkability indices were less likely to resort to intensive margins (utilities, accommodation and restaurants, wholesale and retail trade) (Table 3). However, intensive margins were also widely used in sectors like agriculture, manufacturing, mining, construction, transportation and storage, and other services.

Table 4. Correlation Matrix, Intensive Margins of Adjustment, and Related Variables at the Sectoral Level (2-Digit ISIC)

[25] Based on authors' calculations from LFS. This statistic could not be computed for Indonesia due to the lack of detailed data on economic activity in the LFS. At a less disaggregated level (1-digit ISIC), the intensive margins represented the larger part of working-hour losses in approximately 60% of industries.

	Intensive Margins of Adjustment	Telework ability	MSME Share	Tempora ry Worker Share	Wage Employ ment Share	Low-Skilled Share
	(%)	(%)	(%)	(%)	(%)	(%)
Viet Nam						
Intensive margins of adjustment (%)	1					
Teleworkability (%)	-0.035	1				
MSME share (%)	0.1755	-0.0024	1			
Temporary worker share (%)	0.0524	-0.5833*	0.4195*	1		
Wage employment share (%)	-0.1597	0.3038*	-0.6941*	-0.5749*	1	
Low-skilled share (%)	-0.003	-0.3347*	0.3167*	0.4244*	-0.3827*	1
Philippines						
Intensive margins of adjustment (%)	1					
Teleworkability (%)	-0.1224	1				
Temporary worker share (%)	-0.2659*	-0.3101*		1		
Wage employment share (%)	-0.0226	0.3544*		0.1939	1	
Low-skilled share (%)	0.0769	-0.4927*		0.3409*	-0.2555*	1
Thailand						
Intensive margins of adjustment (%)	1					
Teleworkability (%)	-0.1081	1				
MSME share (%)	0.0083	0.1012	1			
Wage employment share (%)	-0.1838	0.2861*	-0.0526		1	
Low-skilled share (%)	0.0251	-0.4078*	0.0234		-0.3473*	1

*Significant at the 5% level
ISIC = International Standard Industrial Classification, MSMEs = micro, small, and medium-sized enterprises.
There are 88 2-digit ISIC sectors in the sample.

Notes:
(i) Intensive margins are calculated as per the data and methods section. Negative values are set to zero, values greater than 100% are set to 100.
(ii) Teleworkability indices are computed following Generalao (2021), derived by employing a task-based approach and classifying whether a task of an occupation is considered manual, requires physically assisting and caring for others or to be done outdoors, and can be effectively done with the aid of information and communication technology services and devices. The index is scaled from 0 to 1, wherein an occupation with a value of 1 implies that all tasks performed in the occupation can be done entirely at home or offsite, while a value of 0 suggests the opposite. An index value between 0 and 1 means that not all tasks of the particular occupation can be performed from home or offsite. See Generalao (2021) for the detailed task classification process and description of the indices.
(iii) Correlations could not be computed for Indonesia, for which employment data by economic activity are not available at the 2-digit ISIC level in the LFS,
but only at the 1-digit level.
(iv) There is no data available for MSME share in employment in the Philippines and temporary employment in Thailand.

Source: Authors' estimates based on labor force surveys.

Overall, there appears to be no significant correlation between the teleworkability of occupations and the degree to which intensive margins were used in all three countries with available data (Table 4). We also did not find any statistically significant correlation at the sectoral level between the use of intensive adjustment margins and (i) wage and salaried employment as a share of sectoral employment; (ii) micro, small, and medium-sized enterprises (MSMEs) share in sectoral employment; and (iii) low-skilled workers share in sectoral employment. The correlation coefficient for the temporary workers share in wage employment in the Philippines is statistically significant, suggesting a strong negative association with the use of intensive margins of adjustment. This is supported by the estimates from a regression analysis where the coefficient estimates are significant at the 1% level of significance (Table 5).[26] This supports the idea that temporary workers are more easily "let go" in times of crisis and are therefore more vulnerable. Moreover, teleworkability has a statistically significant positive association with wage and salaried work, and negative association with the share of low-skill workers and temporary workers in across countries with available data. This indicates that employees, particularly those with permanent working arrangements are more likely to shift to telework than their self-employed, lower skilled and temporary employee counterparts.

Table 5. Correlates of intensive margins of adjustment, selected countries

	Intensive margins of adjustment (Q2-2020 vis-a-vis Q1-2020)		
	Viet Nam	Thailand	Philippines
Teleworkability (%)	0.013	-0.169	-0.018
	(-0.29)	(-0.268)	(-0.134)
MSME share (%)	0.196	-0.018	
	(-0.216)	(-0.187)	
Temporary worker share (%)	-0.06		-1.026***
	(-0.265)		(-0.352)
Wage employment share (%)	-0.123	-0.26	0.087
	(-0.259)	(-0.182)	(-0.151)
Low-skilled share (%)	-0.039	-0.105	0.203*
	(-0.188)	(-0.198)	(-0.118)
Constant	30.588	66.724***	67.281***
	(-35.906)	(-18.076)	(-13.286)
Observations	80	82	71
R-squared	0.044	0.037	0.127

Standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1
Source: Authors' estimates based on labor force surveys.

[26] The same result hold when a probit regression was used to examine intensive margins of adjustment converted into a binary variable. That is, a value of greater than 50 implies the intensive margin of adjustment was used primarily, while a value less than or equal to 50 means the extensive margin of adjustment was used instead. However, when the ratio of total working hours lost and total working hours is examined, the regression analysis resulted in insignificant estimates.

Another factor that can potentially determine the relative use of intensive and extensive margins of adjustment is policy, specifically the implementation of labor market measures aimed at limiting job losses (more in Section 4). As further discussed below, all four countries in our sample implemented job protection policies including some kind of wage subsidies in the course of 2020 and some also provided incentives for employers to shift towards flexible work arrangements and avoid layoffs. Policies differed across countries in terms of their focus, coverage, targeting and timing of implementation, among other things. In Indonesia, wage subsidies were implemented at the end of August and would therefore not have been effective in the period covered here. The other three countries began implementing job protection policies/wage subsidies, earlier by the end of March 2020 for the Philippines, and in April for Thailand and Viet Nam.

In all three countries for which LFS data are available for Q3 2020 (in the Philippines, Thailand and Viet Nam), the quarter saw a rebound in working hours, mainly accounted for by increased working hours for those still in employment. Working hours recovered in many sectors but remained well below the pre-pandemic levels.

3.5. Differential effects of the pandemic across workers and firms

The pandemic had differential effects on groups of workers based on their skill level, status in employment, the formality and nature of their contractual relationships and work arrangements, and their migration status, among others.

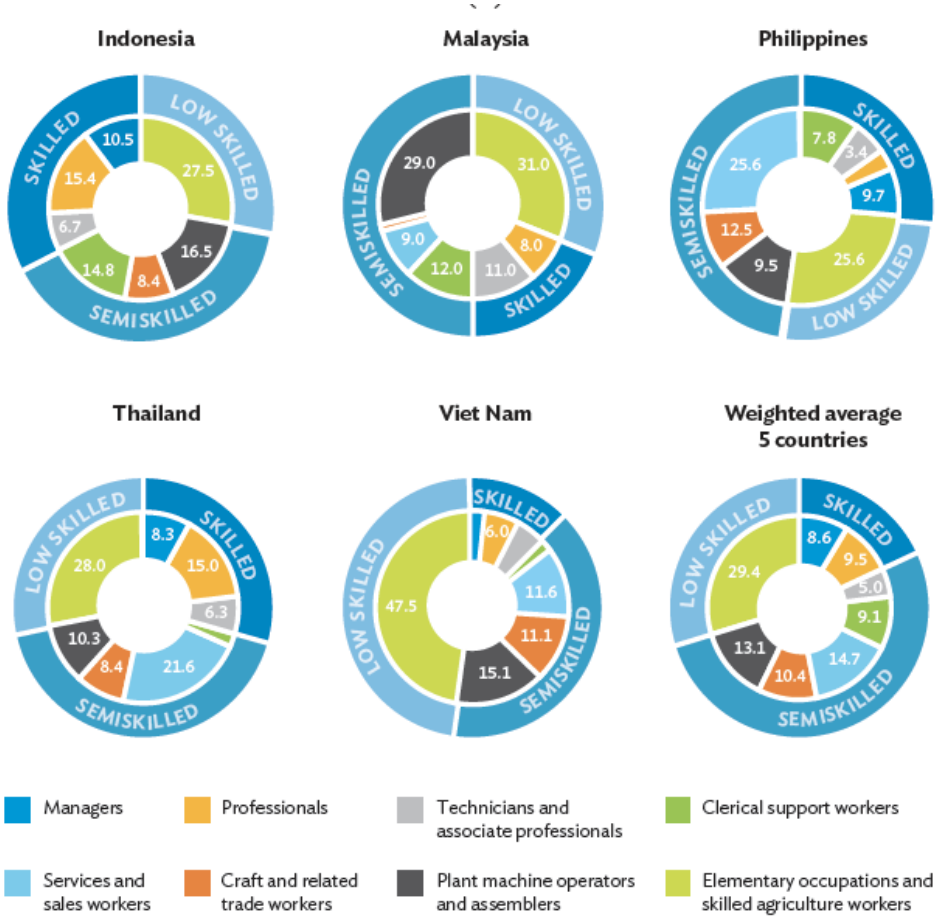
The sectoral impacts of the pandemic and its disproportionate effect on jobs that require human interaction and involve tasks that cannot be carried out remotely are reflected in the occupational and skills distribution of job losses. In countries with available data, the occupational group comprising low-skilled worker categories[27]—elementary occupations and agriculture workers— accounted for the largest share in job losses in Q2 2020 (Figure 7).[28] Low-skilled workers represented nearly half of job losses in Viet Nam, and 25%–30% in Indonesia, Malaysia, the Philippines, and Thailand.

Sales and service workers, a middle-skill occupational category, accounted for another quarter of job losses in the Philippines and more than 20% of job losses in Thailand, with an important impact on women. Female workers represented a large share (approximately 60% in Q1 2020) of this occupational workforce in these two countries and accounted for much of the decline in the occupational group's employment in Q2 2020 (73% in the Philippines and 62% in Thailand).[29]

Middle-skilled occupations in manufacturing and construction were also hit hard at this stage of the crisis, with plant and machine operators and craft and related trade workers representing 19%–26% of job losses in Q2 2020 in these countries (Figure 7). Women comprised over three-quarters of plant and machine operators job losses in Thailand, two-thirds of crafts and related trades workers job losses in Viet Nam in Q2 2020; but a minor share of job losses for these occupational groups in the Philippines and in Indonesia, where female employment in manufacturing is more limited.

[27] Low-skilled workers include those in elementary occupations (International Standard Classification of Occupations [ISCO] code 9) and skilled agricultural, forestry and fishery workers (ISCO code 6).
[28] For Indonesia, job losses refer to the period of March–August 2020.
[29] Authors' calculations based on labor force surveys.

Figure 7. Skills Level and Occupational Group Shares in Net Job Losses, Q2 2020 (%)



Notes: For Indonesia, job losses are calculated between February and August 2020. Elementary occupations and skilled agriculture workers still represent the largest share in job losses in all countries except Indonesia, when seasonality is accounted for (when job losses are relative to the corresponding quarters of 2019). Weighted average
Source: Authors' calculations from labor force surveys of various countries.

As the economy reopened in the Philippines in Q3 2020, the low-skilled jobs created exceeded the number of low-skilled jobs lost in the previous quarter, reflecting the reallocation of labor toward these jobs. Low-skilled jobs accounted for almost half (47%–48%) of jobs recovered or created in the Philippines and in Viet Nam in Q3 2020. Similarly, in Thailand, low-skilled jobs—primarily in agriculture—accounted for most of the jobs created in Q3 2020, as manufacturing and construction continued to shed semiskilled jobs.

The COVID-19 crisis has therefore highlighted the significant vulnerability of low-skilled workers to external shocks and the continued countercyclical role played by low-skilled jobs (in agriculture and services) in absorbing displaced labor during crises. Moreover, some of the heavily affected jobs were those that could not be performed remotely, which includes many manufacturing jobs that are facing relatively high risk from automation in the region (see, for example, ADB 2021c).

Labor reallocation towards own-account work in the second half of 2020 somewhat conceals the fact that this group of workers has been heavily affected by the pandemic across Southeast Asia. While close to 60% of households across the seven countries (Viet Nam, Philippines, Indonesia, Malaysia, Thailand, Lao PDR, Cambodia) included in both rounds of the ADBI's household surveys in ASEAN countries reported a decline in income from wages and salaries, agriculture, and remittances, as many as 84% of households reported income losses from self-employment (household business or own-account work) in the first period February-March 2020 compared to 2019. This source of income continued to be the most affected in the second period from early July 2020 to end of December 2020, with 58% of households reporting declines in income from this source, compared to 46% from agriculture, 36% from remittances and 35% from wages and salaries.

Another category of workers heavily affected by the COVID-19 crisis is that of informal workers. This category includes many own-account workers, but also employees in informal and formal sector enterprises. As mentioned above, informal workers suffered major job losses (e.g., 62% of job losses in Q2 2020 in Viet Nam) and working time reductions due to their significant presence among heavily affected sectors (wholesale and retail trade, hotels and accommodation, other services). The informal workers category also intersects with workers in non-standard forms of employment, including temporary workers and casual workers. These workers have little job security and limited social protection coverage, due to the informal nature of their contractual arrangements. Temporary workers accounted for 61% of job losses in Viet Nam in Q2 2020, and workers in non-standard forms of employment accounted for some 70% of job losses in Q2 2020 in the Philippines.

Migrant workers have been identified as a group that has been severely hit by the pandemic, including those based in the region (estimated at 11.6 million based in Southeast Asia and the Pacific) and those originating from the region (ILO 2020d). As international borders closed up, many of these workers have found themselves stranded in either their home or host countries, often without access to social protection or adequate health care. A number of countries have targeted policies to address protection gaps for these workers, as described in Section 4 below.

The pandemic also had differential impacts on firms, based on their size, export orientation, and access to finance and government support, among other factors. At the height of the pandemic in Q2 2020, micro, small, and medium-sized enterprises (MSMEs) were disproportionately affected, partly due to their being overrepresented in heavily hit sectors. In Thailand and Viet Nam, the two countries for which quarterly LFS data include a firm size variable, MSMEs accounted for 71% and 77% of job losses in Q2 2020, respectively.[30] This was in part due to the large employment shares of MSMEs in agriculture, wholesale and retail trade, transportation and storage, and accommodation and food services in these countries.

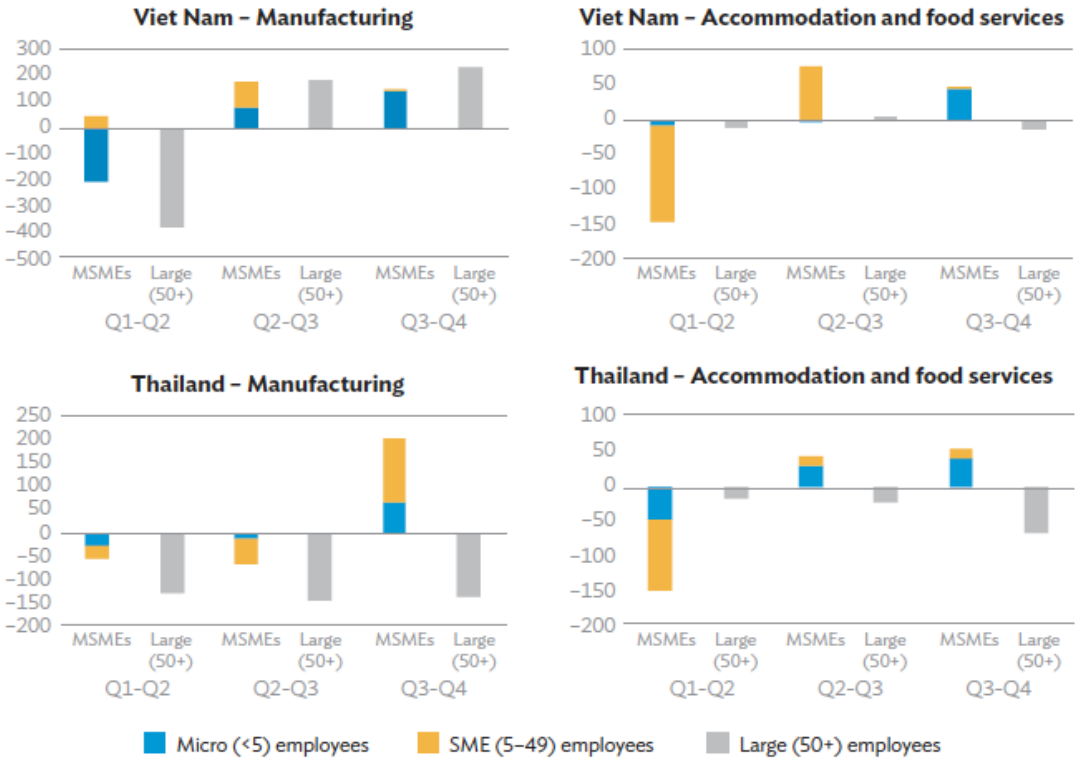
In the manufacturing sector, however, large firms—defined here as enterprises with over 50 employees—represented 65% of net job losses in Q2 2020 in Viet Nam and 71% in Thailand.[31] Larger manufacturing firms are more likely to be export oriented, and therefore heavily affected by supply chain shortages as well as declines in global demand. In

[30] Authors' calculations based on labor force surveys.
[31] Authors' calculations based on labor force surveys.

Thailand, in particular, employment in large enterprises in manufacturing continued to decline through Q4 2020 (Figure 8).

Similarly, in the accommodation and food services sector, larger enterprises—although less affected by the crisis than MSMEs in the early stages—continued to shed jobs throughout 2020. In this sector as well, which is often used as a proxy for the tourism sector (see for example, UNWTO 2020), larger enterprises rely more on international demand, which remained depressed throughout 2020 and 2021. In particular, the Asia and Pacific region saw the steepest decline in tourist arrivals among all regions in the first 5 months of 2021, with a 95% drop compared with the same period in 2019 (UNWTO 2021a).

Figure 8. Change in Employment by Establishment Size in Manufacturing and Accommodation and Food Services, 2020
(000s)



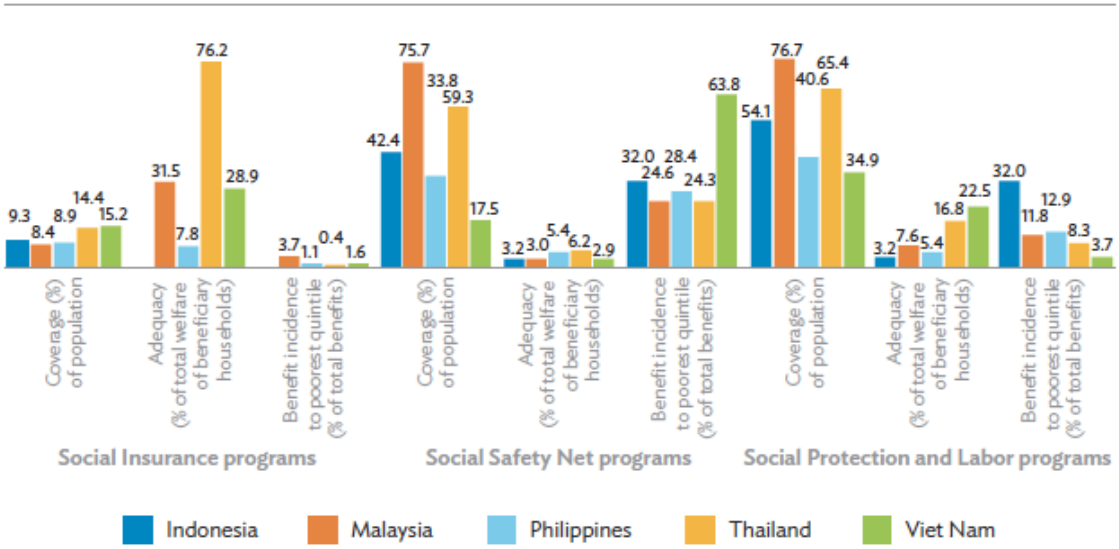
MSMEs = micro, small, and medium-sized enterprises; Q = quarter
Note: Changes are quarter-to-quarter, not accounting for seasonality
Source: Authors' calculations from labor force surveys for Thailand and Viet Nam.

4 What policies have mitigated the impact? Social protection and labor markets in Southeast Asia

Prior to the pandemic, Southeast Asia had major social protection gaps. Due to the high rates of informality, in most countries, social insurance (contributory programs) had very limited population coverage, and very low (less than 4%) incidence to the poorest quintile

(Figure 9). Social assistance (non-contributory programs or social safety nets) had higher population coverage and higher incidence to the poorest quintile, but limited adequacy as measured by the benefits' share in total welfare of beneficiary household. When all social protection measures, including labor programs are taken into account, population coverage improves, but the adequacy of benefits, and the incidence to the poorest quintiles remains limited. In particular, effectivesocial protection coverage remained low in general.[32] Moreover, despite considerable poverty reduction across the region between 2010 and 2019, a large number of workers still lived with their households just above the poverty line (in the moderately poor or near poor categories). These workers, often informal, are often not covered by any social protection measure – a group referred to in the literature as 'missing middle' (ILO, 2017; ESCAP-ILO 2021b). The pandemic highlighted the vulnerability of these workers.

Figure 9. Social Protection and Labor Programs – Coverage, Adequacy and Benefit Incidence to the Poorest



Source: World Bank. ASPIRE: The Atlas of Social Protection: Indicators of Resilience and Equity. Retrieved May 7, 2021 from https://databank.worldbank.org/source/1229

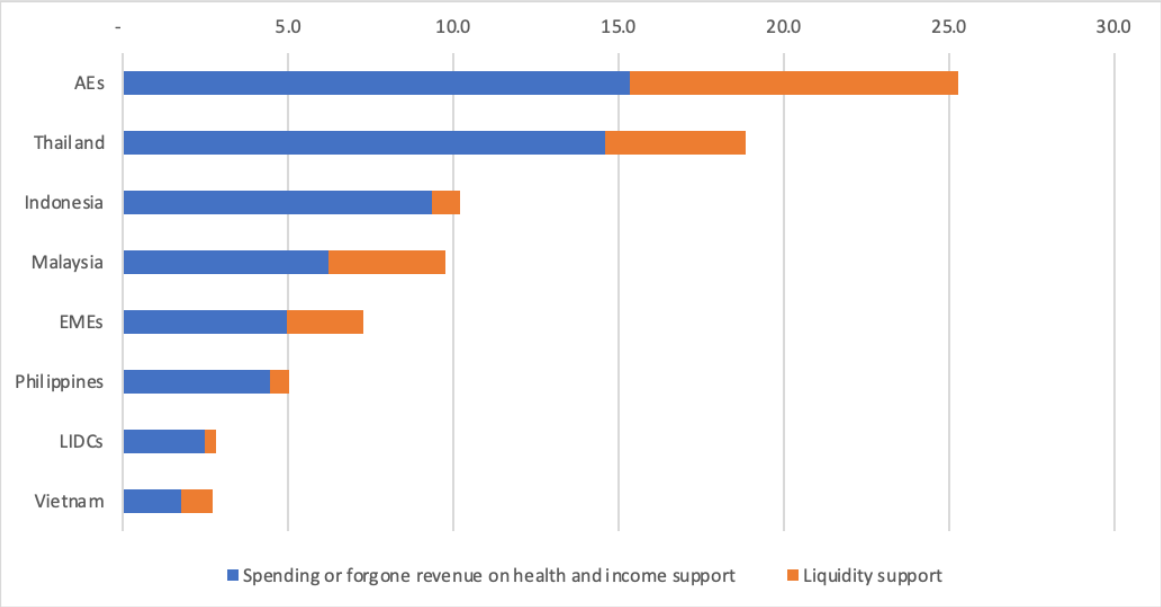
As the pandemic hit the region, many governments implemented significant policy response packages including monetary and fiscal policies to prevent further macroeconomic decline, help businesses stay afloat, and offset working hour and income losses. In general, the availability of fiscal space was a key determinant of the fiscal response to the COVID-19 crisis worldwide. In particular, advanced economies with less financing constraints were able to allocate more resources than emerging and developing economies. And yet, expenditure on the fiscal response packages announced since the onset of the pandemic has been significant in Southeast Asia, ranging from 2.7% of gross domestic product (GDP) in Viet Nam to 18.8% of GDP in Thailand (Figure 10). These fiscal packages included additional spending or forgone revenue on health and income

[32] Social protection indicators published by the ILO distinguish between legal coverage and effective coverage, measuring respectively the population groups covered by a social protection area in existing national legislation, and those covered in practice (for whom social protection areas are actually enforced) (ILO, 2017, pp. 201-202). In terms of effective coverage, there is also a distinction to be made in terms of persons covered by a social protection area (contributor coverage ratio,) and those actually receiving benefits (beneficiary coverage ratio).

support (above the line measures) as well as liquidity support in the form of equity injections, loans, asset purchases, and guarantees (below the line measures).

The substantial expenditure on COVID-19 response in 2020 has further narrowed the fiscal space in these countries, as reflected by widening budget deficits and increased public debt. Among the sample countries, additional spending weighed on fiscal space most severely in the Philippines, where government debt as a share of GDP increased by as much as 40% in 2020.[33] Indeed, the Philippines is among the countries where cash transfers, while substantial in 2020, may have fallen short of what is need in 2021 (World Bank 2021c). Viet Nam had the lowest level of spending in 2020 and was least affected in terms of narrowing fiscal space. The increase in government debt as a share of GDP in Indonesia, Malaysia, and Thailand was close to the average of emerging and developing economies.

Figure 10: Fiscal Response to COVID-19 as a Percentage of GDP, Selected Countries and Country Groups



AEs = advanced economies, EMEs = emerging market economies, LIDCs = low-income developing countries.
Note: Estimates are as of 27 September 2021. Country group averages are weighted by GDP in US dollars adjusted by purchasing power parity.
Source: International Monetary Fund. Database of Fiscal Policy Responses to COVID-19. https://www.imf.org/en/Topics/imf-and-covid19/Fiscal-Policies-Database-in-Response-to-COVID-19 (accessed 18 November 2021).

Across Southeast Asia, social protection was a key component of the fiscal response to COVID-19. The social protection portion of fiscal packages, using spending on health and income support measures as a proxy, has been substantial, making up around 65% in Malaysia and Viet Nam, 77% in Thailand, 88% in the Philippines, and 91% in Indonesia.[34]

[33] World Bank. A Cross-Country Database of Fiscal Space. http://www.worldbank.org/en/research/brief/fiscal-space (accessed 18 November 2021).
[34] Authors' calculations based on the International Monetary Fund. Database of Fiscal Policy Responses to COVID-19. https://www.imf.org/en/Topics/imf-and-covid19/Fiscal-Policies-Database-in-Response-to-COVID-19 (accessed 18 November 2021).

A different policy mix used in each country reflects the local context, and pre-existing strengths and weaknesses of social protection systems. In Cambodia and in Indonesia, social assistance measures accounted for most response policies. In Malaysia, Philippines and Thailand, these policies were accompanied by an equivalent number of labor market policies. In Viet Nam, labor market and employment policies represented half of covid-19 social protection response policies. Statistics on the number of policies implemented are only indicative, however, providing insights regarding the relative importance of different components of the social protection response in each country. This is because interventions can differ greatly along several dimensions, including scope (new intervention, horizontal or vertical expansion of existing measures, implementation change) [35], population or labor force coverage, duration, etc. Here we provide a tentative assessment of the social response to covid-19 in Southeast Asia, by juxtaposing specific policies with labor market impacts discussed in the previous sections. We therefore focus our analysis on the countries covered in the first part of our paper (Indonesia, Malaysia, Philippines, Thailand and Viet Nam). Recognizing that a rigorous analysis of the effectiveness of response policies in protecting jobs and incomes would require more extensive data and sophisticated techniques, we nevertheless attempt to provide a comparative analysis of the response policies implemented in our sample countries, in terms of their timeliness, coverage, adequacy, and the extent to which they have sought to fill pre-existing social protection gaps.

4.1 Labor market and employment protection policies

We first consider labor market and employment protection policies, aimed at preserving jobs during the pandemic, before turning to social assistance, aimed at supporting incomes and livelihoods. Social insurance, although a less significant part of the COVID-19 response in these countries, is also discussed, due to its importance for the sustainability of social protection systems in the long-run.

In examining labor market policies, we focus on wage subsidies and other incentives meant to limit job losses and maintain employment relationships. In our sample of countries, Malaysia and the Philippines were the first to announce wage subsidy programs for workers, by the end of March 2020, followed by Thailand and Viet Nam in early April 2020, and Indonesia, in August 2020.

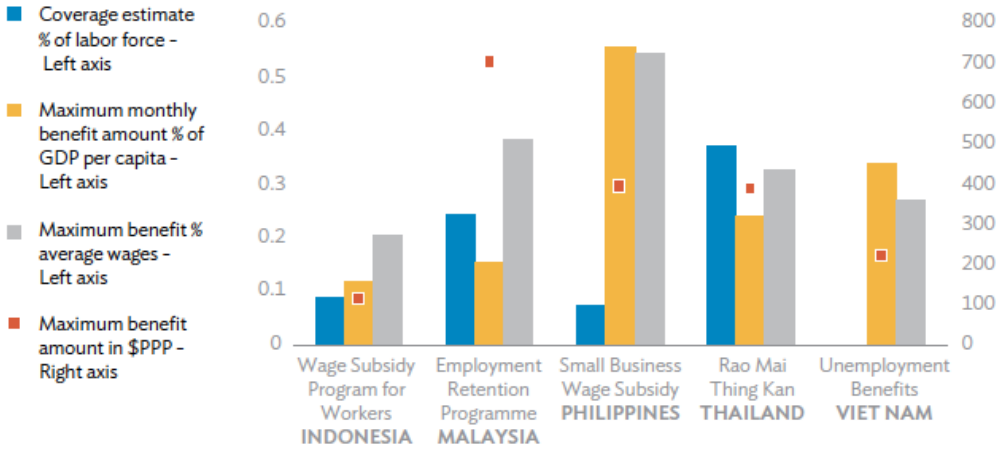
In Malaysia, through the Employment Retention Programme, the Government subsidized wages of employees insured under the Social Security Organization (SOCSO) Employment Insurance Scheme (EIS) to assist employers in retaining their workers during the crisis. This policy covered 25 % of the labor force, with a subsidy equivalent to 38.6% of the average wage (Figure 11). The policy was rolled out in two phases, with a significant budget of RM 5.9 billion for the first phase, and 2.4 billion for the second (Annex Table 5). The program targeted lower pay workers (earning RM 4,000 or less), who contribute to SOCSO's Employment Insurance Scheme, and whose employers are affected by the pandemic, are registered with the Companies Commission Malaysia (SSM) or relevant local authority and do not retrench workers, impose unpaid leave or force wage cuts.[36] In

[35] Horizontal expansion refers to coverage or number of beneficiaries. Vertical expansion refers to an increase in the benefit amount. An implementation change can involve relaxing eligibility criteria, advancing payments, deferring contributions, etc.
[36] In the first phase, affected employers were those experiencing more than 50% decrease in their income since January 1, 2020. In the second phase, employers still affected by the crisis are those who since the Recovery Movement Control Order (RMCO) were still facing lower revenues of at least 30% compared to 2019.

the second phase of the program, participating employers were still not allowed to retrench workers earning less than RM 4,000, but were allowed to reduce working hours and wages through negotiations with workers. The program was accompanied by a range of additional interventions and targeted measures. In March 2020, targeted measures included special allowances for frontline workers, wage subsidies for workers under service contracts with the government during the movement control order (MCO), and one-off cash incentives to taxi drivers, tour guides and trishaw drivers, and to e-hailing drivers who were registered and employed. As of June 2020, additional measures included a range of tax incentives to employers offering flexible work arrangements for employees registered under the Employment Injury Scheme, and subsidies to working parents for child care expenses. Another important policy measure, announced in June but implemented at the end of August involved government support to employers for hiring and training workers during the COVID-19 crisis. The latter policy involved wage subsidies amounting to 32.4% of average wages, and covered approximately 1.9% of the workforce (Annex Table 5). Although detailed LFS data are unavailable to disaggregate working hour losses in Malaysia into intensive and extensive margins, the wide range of labor market measures and the relatively high coverage of the labor force (by the Employment Retention Programme in particular) suggest that the measures have contributed to limiting job losses in Malaysia throughout 2020.

In the Philippines the Covid-19 Adjustment Measures Programme (CAMP) provided cash aid to affected workers of establishments that either implemented flexible working arrangements or suspended business operations due to the pandemic. The programme covered over 650,000 workers, or approximately 1.5% of the labor force, with a benefit equivalent to 34% of the average wage (Figure 11; Annex Table 5). The CAMP was followed by the Small Business Wage Subsidy programme announced in April and implemented in May 2020, which aimed to cover 3.4 million workers, or approximately 7.5% of the labor force, employed in small businesses affected by the Enhanced Community Quarantine (ECQ). These two important subsidy programmes were accompanied by more targeted ones, aimed at supporting frontline public health workers, and workers providing care to covid-19 patients. These labor market and employment protection policies implemented early on in the crisis contributed to mitigating job losses, which were nevertheless extensive in the Philippines*.* Specifically, these measures may have contributed to the relatively high use of intensive margins of adjustment across most sectors in the country, as described above, but the limited coverage of the labor force suggests that other factors beyond these policy interventions also played a key role in this.

Figure 11. COVID-19 Labor Market Response Policies – Coverage and Adequacy OF Wage Subsidies



Source: Authors' illustration based on International Policy Centre for Inclusive Growth (IPC-IG). Social Protection Responses to COVID-19 in the Global South database. Retrieved May 28, 2021 from https://socialprotection.org/social-protection-responses-covid-19-global-south.

Thailand is the country that suffered the least job losses in 2020 within our sample. Its social security system is by far the most developed in the region, with 68% of its population effectively covered in at least one area of social protection (ILO 2021d). Consequently, Thailand's labor market response policies were targeted to two broad groups, which have been identified as highly vulnerable in the covid-19 pandemic: informal workers and young workers. Specifically, under the Rao Mai Ting Kan programme, informal workers (not insured under the Social Security Fund) whether temporary, contractors or self-employed workers, were eligible to receive a cash transfer for 3 months during the State of Emergency. This policy covered 14.5 million workers or 37% of the workforce, with a wage subsidy equivalent to 32.9% of the average salary (**Error! Reference source not found.**; Annex Table 5). Informal workers represent large shares of employment in the highly affected services sectors in Thailand (wholesale and retail trade, accommodation and food services, and other services), which together accounted for 38% of job losses in Q2 2020 (Table 2). As youth were disproportionately affected by job losses in Thailand (like in other countries of the region) another labor market policy implemented as of September 2020 aimed at protecting the jobs of new graduates from universities and vocational training colleges (under the age of 25 and who graduated before 2019), through a government subsidy equivalent to 50% of their wages. Because of its narrow target group, the latter policy only covered 260,000 workers or 0.7% of the workforce (Annex Table 5).

In Viet Nam, the first wage support policy implemented involved an allowance for workers involved in COVID-19's prevention and control. A broader wage subsidy program implemented from April 2020 took the form of unemployment benefits paid for a three-months period to workers whose contract was suspended or who took unpaid leave, in cases where the employer could no longer pay wages due to the covid-19 pandemic. The subsidy amounted to 27% of average wages (**Error! Reference source not found.**). Although data on the share of the workforce covered by this policy are unavailable, coverage is likely to be somewhat limited as a large share of job losses in Q2 2020 was accounted for by agriculture workers, many of whom are contributing family workers and are therefore not eligible for the subsidy. Nevertheless, the wage subsidy program is likely to have benefited wage and salaried workers in the heavily affected sectors of manufacturing, wholesale and retail trade and food and accommodation.

In Indonesia, the first labor market response policy implemented from April 2020 was the Pre-employment card program, through which jobseekers, laid-off workers or workers with suspended employment contracts, among others, received cash for job trainings and other job incentives. The program is estimated to cover 5.6 million workers or 4.1% of the labor force, with a benefit amount equivalent to 20.6% of the average wage (Annex Table 5). Based on LFS for August 2020, 28% of the population knew about the pre-employment card program, out of whom 7% had registered for the program. Among those who did register, 13% or approximately 300,000 persons passed the selection process. Out of those selected, 64% had completed training associated with the program. A large majority (89%) of those who completed training confirmed that the program improved their skills, and 84% received incentives (pocket money) from the program. LFS data therefore suggest that 5 months into its implementation, the pre-employment card program had fewer beneficiaries than targeted. The large gap between the numbers of targeted beneficiaries and actual beneficiaries points to implementation challenges. For the few actual beneficiaries however, the program seems effective in achieving its objectives.

Indonesia like the other countries, also implemented a wage subsidy among its labor market response policies, but did so with a delay. The measure, involving wage subsidies for 4 months, to active social security members with earnings of less than 5 million rupees per month, was implemented as of August 27, 2020 (Annex Table 5). The latter measure covers 11.9 million workers or 8.7% of the workforce. The subsidy amount (IDR 600,000 or 20.6% of the average wage) is equivalent to the benefit from the pre-employment card program. Other labor market response policies in Indonesia were targeted, including cash transfers to taxi, bus and truck drivers implemented at the onset of the crisis in April, and wage subsidies for education personnel, implemented in November 2020, following major job losses in the education sector. The education sector had incurred a significant share of job losses in Indonesia between February and August 2020 (27% of job losses, while manufacturing accounted for another 27%) (Table 2).

All countries in our sample have attempted, namely through targeted labor market measures, to fill some social protection gaps, extending social protection to vulnerable groups. Specifically, in Thailand, the key policy targeted informal workers as described above. In the Philippines, the CAMP Abot Kamay Ang Pagtulong Sa OFWs (AKAP) targeted registered Overseas Filipino Workers (OFWs) affected by the pandemic, who either remained abroad or were repatriated. In 2019, there were an estimated 2.2 million OFWs, including 1.2 million women (79%) out of whom 63% were employed in elementary occupations.[37] In Indonesia, return migrant workers (who were working in Malaysia, Singapore and Hong Kong, China) were eligible for the pre-employment card program. In Malaysia, the government reduced the foreign worker levy for all companies formally employing foreigners, to protect jobs.

In terms of timeliness and speed of policy interventions, implementation – as measured by the first benefit payment in most cases, or by the date of first application/ registration – was carried out early on in March-April 2020 in Malaysia, Philippines, Thailand and Viet Nam, and generally began within a week of the measures' announcement, and within two months of the first covid-19 case in each country (mid-January 2020 for Thailand, end of

[37] Authors' calculations based on the Philippine's Statistics Authority [PSA] 2019 Survey on Overseas Filipinos.

January for the other three countries).[38] In Indonesia, the wage subsidy program was announced in early August 2020, and implementation began at the end of the month. This was approximately 6 months after the first covid-19 case in Indonesia, which was identified in early March 2020.[39] In general, timeliness and speed of implementation were aided by the use of electronic transfers into personal bank accounts in all our sample countries. In the case of the Philippines (Small Business Wage Subsidy program), this payment delivery method was also supplemented by the use of electronic vouchers or payment cards, and manual cash payments where other methods could not be used.

In general, the coverage of the workforce by labor market policies was limited, with the highest (in terms of targeted percentage of the workforce) afforded by Thailand's Rao Mai Ting Kan (informal workers subsidy) program (37%), and Malaysia's Employment Retention program (24%). The adequacy of benefits were generally higher for the more targeted policies, with 75% of average wages for frontline health workers in the Philippines, 62% of average wages for frontline education workers. In Viet Nam, the allowance for workers engaged in covid-19 prevention and control exceeded average wages by 37% (Annex Table 5).

4.2 Social assistance

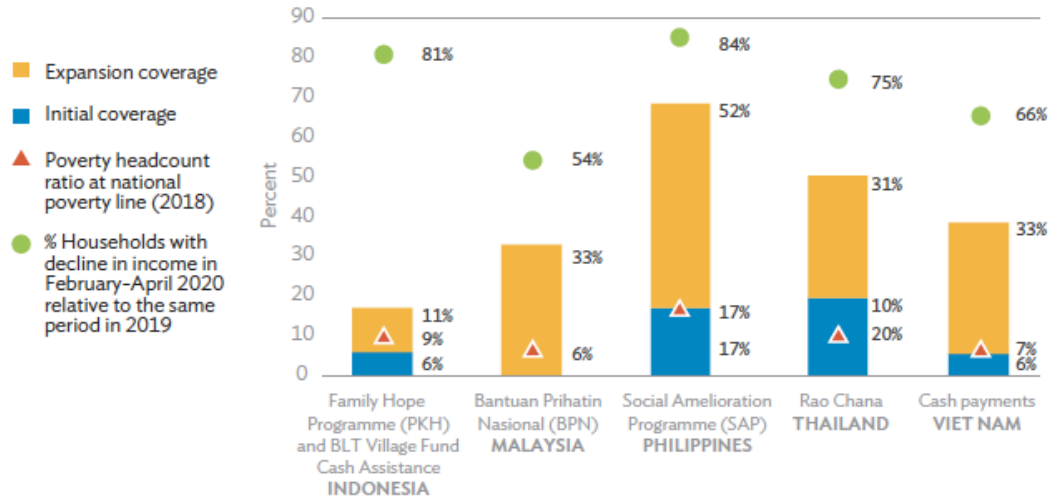
Social assistance measures to compensate for income losses and sustain livelihoods constituted the largest component of the social protection response to covid-19 in Southeast Asia. In this comparative analysis, we focus on the first and largest social assistance instrument used in Southeast Asia in response to the pandemic: emergency cash and in-kind transfers.

All countries in our sample implemented emergency cash transfers in response to COVID-19. In most cases, these interventions were built upon existing programs in these countries. However, new measures, unrelated to existing programs were additionally introduced in the Philippines, Indonesia and Malaysia. Whether the interventions were linked to existing programmes or not, in most cases, social registries or beneficiary databases from existing programmes were used to rapidly identify beneficiaries. In a few cases, open registration or new enrollment campaigns were also used (for demand-based and community-based targeting). Disbursements were largely made through electronic transfers into personal bank accounts, electronic vouchers or payment cards, (or both). In Indonesia and in the Philippines, these methods were supplemented by manual cash payments as needed.

Figure 12. Poverty Headcount Ratio, Declines in Household Incomes and Coverage Expansion of Social Assistance Programs in Response to COVID-19

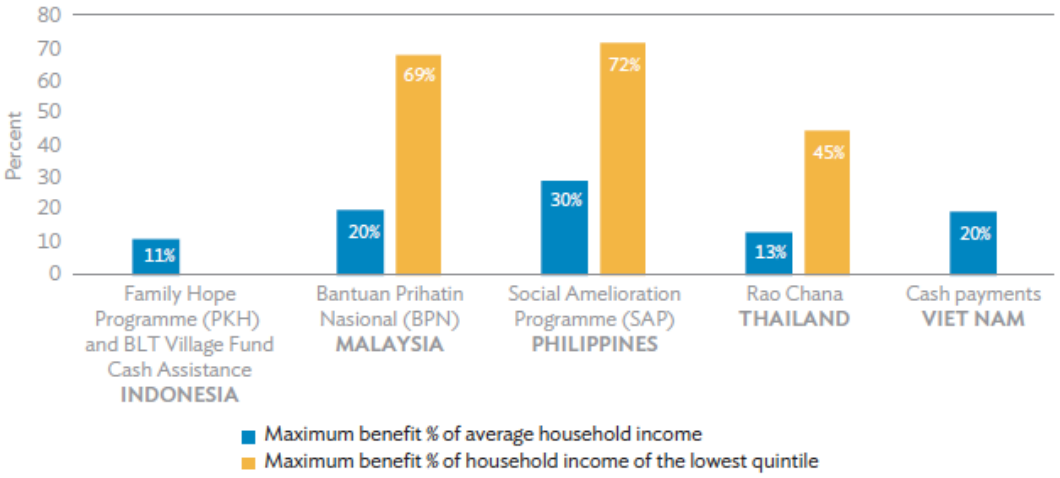
[38] The 'first COVID-19 case' is only one of the three proxy 'triggers' used in (Beazley et al., 2021). The other two triggers being the date when the pandemic was declared on 11/03/202 ('pandemic declaration date') and the day that containment measures were implemented in each country ('stay home' date). The latter trigger in particular may be the most relevant as it marks the date that labor market impacts intensified in Southeast Asia. This will be considered in the next stage of our research.

[39] The exact 'first COVID-19 cases' dates are: 02/03/2020 (Indonesia), 26/01/202 (Malaysia), 30/01/2020 (Philippines), 13/01/2020 (Thailand) and 24/01/2020 (Viet Nam).



Sources: Authors' illustration based on International Policy Centre for Inclusive Growth. Social Protection Responses to COVID-19 in the Global South: Online Dashboard. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 28 May 2021); World Bank. World Development Indicators. https://databank.worldbank.org/source/world-development-indicators (accessed 2 December 2021); and calculations using ADBI household Surveys in ASEAN countries.

Figure 1. Adequacy of benefits for large-scale emergency cash transfers



Source: International Policy Centre for Inclusive Growth. Social Protection Responses to COVID-19 in the Global South: Online Dashboard. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 28 May 2021).

In Indonesia, 81% of households reported a decrease in income in the period of February-April 2020 compared to the same period in the previous year (Figure 12). Two emergency cash transfer measures, and one in-kind transfer measure, building upon existing social assistance programmes were implemented from March-April 2020. The flagship Family Hope Programme (PKH) had an expansion of coverage as well as an increase in the level of benefits disbursed, and the benefit was distributed monthly instead of quarterly. The 9 million existing beneficiaries (approximately 3.4% of the population) had a benefit top-up of 25-56%, and coverage is estimated to have increased by 800,000 new beneficiaries. Through the BLT Village Fund Cash Assistance programme, a cash transfer was provided for 3 months initially, and extended for another 3 months to poor persons living in rural areas and villages, primarily farmers and low income families who have not received other

government assistance. By June 2020, approximately 6.9 beneficiaries had been observed, and the targeted/ projected number of beneficiaries stood at 12.3 million. The Staple Food Card program also had a coverage expansion, as well as an increase in the transfer amount. Existing beneficiaries (15.2 million or 5.6% of the population) had a increase in transfer of 25-36% and were joined by an additional 4.8 million recipients. Smaller scale emergency cash and in-kind transfers were also made by the National Zakat Agency (BAZNAS), covering some190,000 recipients. These programs were complemented with public works (cash for work) programs, targeting low skilled workers (e.g. rural infrastructure development programs), informal workers, unemployed and underemployed persons, and marginalized communities.

Malaysia is, among our sample countries, the countries where the impact of the pandemic on household income was least severe between February and April 2020, with just over half (54%) of survey respondents reporting a decline in income compared to the same period in 2019 (Figure 12). Nevertheless, in response to covid-19, the coverage of the Bantuan Sara Hidup (BSH) program (4.3 million beneficiaries or 52% of the population) was expanded by 1.2 million, its benefits increased by 15%, and the disbursement was anticipated from May to March 2020. This intervention was accompanied by additional new policy measures, including the Bantuan Prihatin Nasional (BPN), which covered 10.6 million beneficiaries or one third of the population (as of September 2020) with a one-off cash transfer. BPN beneficiaries included those with BSH accounts and other low-icome households or individuals aged 21 or older. Payments were made in April and May 2020, with a second round of payments starting in October 2020. Additional cash transfers in Malaysia targeted vulnerable groups and persons, including the persons with disabilities (OKUs), single mothers, senior citizens, children in shelters, homeless persons and indigenous persons.

The Philippines is the country where the largest share of households (84%) experienced income losses in February-April 2020 compared to the same period in 2019 (Figure 12). There, the social assistance response to covid-19, the Social Amelioration Program (SAP) was linked to the existing Pantawid Pamilya Pilipino Programme (4Ps) and Rice Subsidy program, which had approximately 4.4 million active household beneficiaries (approximately 17% of the population) in 2015. The SAP's targeted coverage expansion is 13.3 million low-income families (52% of the population) in addition to those beneficiaries of the 4Ps program. The benefit amount of 4Ps recipients increased by two- to three-fold. SAP had the highest adequacy of benefits among large-scale cash transfer programs implemented in the region, with a maximum benefit reaching 72% of the household income of the lowest income quintile (Figure 13). Additionally, an Emergency Subsidy Program (ESP) was introduced, to provide a one-time cash grant and food packs to households identified by their local government units (LGUs) as low income, but who did not qualify for benefits under the SAP. In addition to social assistance programs, the Philippines also implemented a public works program for informal workers affected by the crisis, including displaced, underemployed and seasonal workers.

In Thailand, despite the relatively limited labor market impact of the crisis in the first half of 2020, 75% of survey respondents reported a decline in household income (Figure 12). In May 2020, approximately 13.4 million Welfare Card holders (unemployed, or low income individuals), approximately 19% of the population, had their benefits increase by 56%. The more substantial expansions of the program were implemented in 2021 however. Welfare Card holders, who had increased to 13.7 million, saw a 338% increase

of the benefits, and the program and budget was expanded to cover an additional 21.5 million beneficiaries (out of whom 16.8 million were registered by April 2021).

In Viet Nam, two-thirds of respondents reported a decline in household income over the February to April 2020 period compared to the previous year (Figure 12). In response to COVID-19, social assistance measures primarily involved the expansion in April 2020 of existing cash transfer programs (covering 1.4 million persons with meritorious service[40] and recipients of other social protection programmes), to approximately 10 million beneficiaries. The additional 8.6 million recipients (approximately 33% of the population) include those living in poor and near-poor households based on the National Poverty line, unemployed persons or those with terminated employment contracts but are not eligible for unemployment benefits, self-employed workers who have lost their jobs, and household businesses with low revenues having temporarily suspended business. The target group of this intervention therefore includes the large share of contributing family workers having exited the labor force due to the suspension of family business operations, as reflected in the overwhelming share of transitions out of the labor force (among the transitions out of employment) in Viet Nam in Q2 2020.

In addition to emergency cash and in-kind transfers, other social assistance measures implemented across Southeast Asia included subsidies for utilities, telecommunications, housing, loans/credit, and tuition (**Error! Reference source not found.**). Two countries (Malaysia and the Philippines) expanded coverage of non-contributory health insurance. Some countries (Malaysia, Philippines) implemented public works programmes (cash for work), targeting low skilled workers affected by the pandemic.

4.3 Social insurance

Social insurance, which is the smaller component of social protection systems in Southeast Asia, had a limited contribution to the region's social protection response to COVID-19. Social insurance measures target formal workers, and therefore have limited coverage in most of the region's economies. Social insurance response interventions in the region were generally linked to existing measures, and pertained to four social protection areas: unemployment insurance, health insurance, sick leave and employment injury, and contributory pensions.

In Indonesia, the main social insurance interventions were with respect to health insurance. Specifically, low income and vulnerable categories of workers (non-employees and non-salaried employees) covered by the national health insurance scheme (JKN) and social security provider (BPJS Kesehatan) received subsidies for their health insurance premiums for a six-months period (**Error! Reference source not found.**). The premium (IDR 42.000 per month, equivalent to 8$ PPP) was paid for 96.6 million persons by the central government, and for 36 million others by the regional government. A planned increase in health insurance premium was also revoked for the most vulnerable insured workers by a Supreme Court decision.

In Malaysia, eligibility criteria for unemployment benefits under the Employment Insurance System (EIS) were relaxed for workers retrenched in Covid-19 affected sectors, the claimable training costs were increased, and a daily training allowance was provided. In

[40] Includes people who participated in the revolution, martyrs, Vietnamese heroic mothers, war invalids, etc.

2018, 7 million workers (44% of the labor force) were insured under the EIS. Among insured workers, just over 100,000 (0.6% of the labor force) had applied to benefit from this measure.

Another social insurance response policy implemented in Malaysia involved allowing early withdrawals from the Employees Provident Fund (EPF), a pension fund based on voluntary contributions from employees, self-employed persons and business owners). The EPF covers 7.6 million workers (48% of the labor force), out of whom 3.5 million (22% of the labor force) had applied for early withdrawals by May 2020. The government additionally allowed early fund withdrawals for participants in the Private Retirement Scheme (PRS), amended the Employment Injury Scheme to cover accidents at home, for workers with flexible work arrangements during the pandemic and partially funded a work-injury scheme for employees in the gig economy.

In the Philippines, unemployment surged in Q2 2020, as strict containment measures affected displaced labor absorbing sectors and prevented reallocation towards these sectors. Unemployment benefits were provided to Social Security System (SSS) premium-paying members[41] who lost their jobs due to lay-offs or business closures or cessation of operations related to covid-19, or due to illness or disease. The benefits amount to half of the average monthly salary for a two-months period. While the SSS had 18.4 million members (40% of the labor force) in 2018, enrolment for the unemployment benefits was demand-based and expected to cover between 30,000 and 60,000 workers (less than 1% of the labor force).

The Philippines also made changes to its PhilHealth contributory health insurance program, specifically by deferring the payment of contributions, weaving the 45-day coverage policy and extending the filing period for claims. As a more targeted social insurance measure, the Philippines also provided one-off sickness and death cash benefits to public and private frontline workers insured by either the Government Social Insurance System (GSIS) or by the SSS, who contract COVID-19 through the Employees' Compensation Programme. As of December 2020, 4,000 workers had availed of these benefits.

In Thailand, most of the displaced workers in Q2 2020 (84%) had transitioned to unemployment, rather than out of the labor force. While the impact on informal workers was addressed through the Rao Mai Ting Kan program, three new unemployment benefits measures were introduced targeting formal workers: ‘Force majeure – unemployment benefits’ to workers insured under the Social Security Fund (SSF) affected by the crisis (up to 3-months duration), ‘Economic crisis – unemployment benefits’ to insured workers during unemployment periods due to the crisis between March 2020 and February 2021 (up to 7-months duration), and a one-off allowance for Thai return migrant workers. Coverage of the ‘Force majeure’ policy was 984,000 or 2.5% of the labor force in May 2020, while just over 15,000 had received termination benefits under the ‘Economic crisis’ policy by March 2021.

In Viet Nam, the health insurance policy coverage (87% of the population or approximately 84 million persons) was extended to cover any covid-19 patients, national or foreigners,

[41] Includes private-sector employees, self-employed persons, and household workers, who must make mandatory payments, as well as voluntary contributors among citizens of the Philippines working abroad, persons who previously had mandatory coverage, and nonworking spouses of insured persons

and particularly targeting vulnerable persons including children, elderly, disabled, refugees, internally displaced persons (IDPs). As Viet Nam succeeded in containing the spread of the virus, only 1,500 persons had needed this coverage by January 2021. Additionally, patients with chronic diseases were given medicines for at least two months at a time, and other administrative adjustments were made to ensure free health care to insurance card holders, even during lockdowns or when medical facilities are exclusively treating COVID-19 patients.

In sum, social insurance response policies to COVID-19 had limited reach in Southeast Asia, where social insurance coverage remains limited. Nevertheless, unemployment benefits and employment injury and sickness protection were extended to displaced formal workers who would not have been covered otherwise, including those not meeting eligibility criteria due to insufficient contributions, return migrant workers, gig economy workers and others.

5 Summary and concluding remarks

The COVID-19 pandemic hit Southeast Asia's economies hard, resulting in major job losses across many sectors. Job-losses peaked in the second quarter of 2020, when the stringency of containment measures were at their highest, and mobility restrictions and workplace closures prevented labor reallocation across sectors and status-in-employment categories. In four of our sample countries (Indonesia, Malaysia, Thailand and Philippines) unemployment surged. In Viet Nam, where the largest share of job losses in Q2 2020 consisted in agriculture jobs (specifically, contributing family work in agriculture), most job losses consisted in transitions out of the labor force.

Own-account workers and informal workers who constitute a large segment of workers in highly affected sectors, were particularly vulnerable to the crisis. Informal workers suffered many job and income losses in the early stage of the pandemic, and self-employment was the source of household income most affected by the pandemic across Southeast Asia throughout 2020. The crisis also had a differential effect on youth and on women. Young workers suffered a disproportionate amount of job losses, while women were more likely to exit the labor force following job loss than men. Exits from the labor force – particularly in contexts where female labor force participation is relatively low, as is the case in Indonesia and the Philippines – can have long-term negative impacts on the working lives of women. We did not however find evidence of labor market detachment in our sample countries, as many female workers reentered the labor market in the second half of the year. In some cases, an 'added worker effect' was even observed, whereby the labor force re-entries in Q3 exceeded labor force exits in Q2 for many female cohorts. Employment patterns in the second half of the year suggest that the COVID-19 crisis has set back gains in terms of decent work in the region. As restrictions eased up, employment picked up but generally consisted in lower quality jobs as the recovery of formal wage employment lagged behind that of informal employment and own-account work.

The massive drops in employment levels that took place in Q2 2020 could have been even worse had it not been for reductions in working hours, as firms and workers resorted to intensive margins of adjustment across many sectors. The extent to which intensive margins of adjustment dominated, differed across countries and across sectors within countries. We explored several potential factors that could explain this, but did not find

strong correlation at the sectoral level between these factors and the specific pattern of adjustment. The limited correlation is likely due to the mutually offsetting effect of these factors.

The crisis also had a differential impact on firms, based on size, export orientation, access to finance, and government support among others. At the height of the pandemic's impacts on the region's labor markets in Q2 2020, micro, small and medium-sized enterprises (MSMEs) were disproportionately affected by job cuts. Micro and small firms have less liquidity, and had more limited access to, or capacity to avail of, government support. Differential impacts across firms took place along other dimensions as well, such as export orientation or the dependence on domestic or international markets. In Thailand, for instance, while small MSME employment in manufacturing recovered in Q4 2020, large manufacturing firms continued to shed jobs. The same pattern can be observed in both Thailand and Viet Nam in the accommodation and food services, where after taking a major hit in Q2 2020, MSME employment recovered in the second half of the year, while larger firms less affected by job cuts early on, shed more jobs in the second half of the year, as disruptions to international tourism persisted.

Although the social protection response across these countries has been impressive, the potential effectiveness of interventions in mitigating job and income losses has varied across countries and policies. In general, timeliness and speed of implementation were aided by the use of electronic transfers into personal bank accounts in all our sample countries, and by the existence of social registries and databases.

Active labor market programs (ALMPs) including wage and training subsidies played an important role in country responses. In general, the coverage of the workforce by labor market policies was limited, with the highest (in terms of targeted percentage of the workforce) afforded by Thailand's informal workers subsidy program and Malaysia's Employment Retention program. The adequacy of benefits were generally higher for the more targeted policies. Social assistance programs and particularly large-scale cash transfer programs played an integral role in the social response of these countries. Key interventions across our sample countries consisted in massive horizontal expansion (increased population coverage) of existing programs. Social insurance measures may have benefited a small segment of formal workers, but these policies coverage remained limited.

All countries in our sample have attempted to fill some social protection gaps, extending social protection to vulnerable groups. For instance, Thailand's labor market response policies were targeted to two broad groups, identified as highly vulnerable in the covid-19 pandemic: informal workers and young workers. In the Philippines, a program targeted registered Overseas Filipino Workers (OFWs) affected by the pandemic, who either remained abroad or were repatriated. In Indonesia, return migrant workers were eligible for the pre-employment card programme. In Malaysia, the government reduced the foreign worker levy for all companies formally employing foreigners, to protect jobs, and extended unemployment benefits and employment injury and sickness to displaced formal workers who would not have been covered otherwise, including those not meeting eligibility criteria due to insufficient contributions, return migrant workers, gig economy workers and others.

In some cases, data on beneficiaries in the database consists of actual beneficiaries, but often the figures represent target numbers. In the case of the preemployment card in Indonesia, additional questions included in the LFS provided us with insights regarding

implementation challenges. As additional data sources become available over time, a more rigorous assessment of these policy interventions will be possible.

In the next phase of our research, we hope to focus on three elements: First, we hope to expand the analysis undertaken here to a larger sample of the region's countries (Cambodia, Lao PDR, others), through the exploration of alternative data sources. Second, we hope to go deeper and further, building upon the analysis we have undertaken here, to provide country-specific recommendations and entry points for developing and strengthening social protection systems in the region, taking into account the challenges and opportunities revealed by the COVID-19 crisis. Finally, we hope to further explore the way the crisis has interacted with drivers of structural change in the region, and specifically trade and technology (e.g., through the link with telework, off-shoring and near-shoring trends, etc.), to determine the impact this interaction may have had on inequality, including in the longer run. In particular, we are interested in implications for the role of social protection and skills development in setting Southeast Asia back on track to achieve inclusive and sustainable growth.

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Annex A. Methodologies

A1. Calculation of change in working hours

Variable	Definition
H_t	Total hours worked at time t
E_t	Employed population at time t
$AH_t = H_t/E_t$	Average hours worked at time t

(A) Hours lost due to job loss:

$$Hours\ lost\ due\ to\ job\ loss_t = \Delta E_t * AH_{t-1}$$

(B) Hours lost in employment:

$$Hours\ lost\ in\ employment_t = E_t * \Delta AH_t$$

(C) Total working hours lost = (A) + (B)

Total working hours lost (%) = (C) / H_{t-1}
Intensive margin of adjustment (%) = (B) / (C)
Extensive margin of adjustment (%) = (A) / (C)

Notes:
(1) The difference operator Δ applied to variable X at time t refers to the change in the variable compared to the previous quarter value. Thus, $\Delta X_t = X_t - X_{t-1}$.
(2) Hours worked refer to total hours worked in the main job.

A2. Regression analysis

We estimate the following model using multiple linear regression to determine the significant factors that may have influenced intensive margins of adjustment.

$$\text{int\_margin}_i = \beta_0 + \boldsymbol{\beta X} + \varepsilon_i \quad (1)$$

Where *int* ε [0, 100] and refers to either the continuous intensive margins of adjustment or the share of total working hours lost in the total working hours in the reference period; *i* pertains to the corresponding 2-digit ISIC, ***X*** is a vector for other factors, such as average teleworkability, wage employment share, MSME share, temporary work share, and low-skill work share; and ε pertains to the error term.

We also estimate Equation 2 using probit regression to determine the significant factors that may have influenced intensive margins of adjustment. We define the dependent variable as a binary variable, wherein a value of 1 is assigned when the intensive margin value of greater than 50, and a value of 0 to 2-digit ISIC industries with intensive margins of adjustment of less than or equal to 50. The same set of independent variables, ***X,*** were used as in Equation 1.

$$\text{intensive}_i = \beta_0 + \boldsymbol{\beta X} + \varepsilon_i \quad (2)$$

Annex B. Summary Tables

Annex Table 1. Informal Employment and its Components, Latest Year Available

	Cambodia	Indonesia	Lao People's Democratic Republic	Thailand	Viet Nam
Informal employment rate (%)					
Total	93.6	80.4	82.9	64.4	67.3
Male	91.4	79.4	80.1	63.7	70.4
Female	96.0	81.8	86.0	65.2	63.6
Employees	87.6	79.2	48.8	46.0	45.7
Self-employed	98.7	81.5	98.6	81.0	89.9
Agriculture	99.6	94.7	99.1	89.2	98.8
Non-agriculture	90.6	74.7	75.5	51.9	54.2
Share of employment outside the formal sector (%)					
Total	39.9	51.6	37.3	46.4	52.2
Male	38.6	51.0	34.6	47.2	55.0
Female	41.3	52.4	40.4	45.4	49.0

Note: Latest year is 2019 for Indonesia and Viet Nam, 2018 for Thailand, 2017 for Lao PDR, 2012 for Cambodia
Source: ILOSTAT; Labor Force Surveys.

Annex Table 2. Selected Contextual Factors

	Cambodia	Indonesia	Lao PDR	Malaysia	Philippines	Thailand	Viet Nam
Spread of the virus (total cases per million – period average)[1]	19	1,546	4	2,051	2,230	95	10
Stringency of containment measures (period average)[1]	44	63	39	62	71	47	62
2019 GDP per capita (current US$)	4,135.2	1,643.1	2,545.0	11,414.2	3,485.3	7,817.0	2,715.3

Note: [1] Period covers Jan 2020 – March 2021.
Source: Stringency index and COVID-19 cases from Our World in Data. COVID-19 Data Explorer https://ourworldindata.org/coronavirus (accessed 09 July 2021); World Bank. World Development Indicators. http://databank.worldbank.org/data/home.aspx (accessed 14 August 2021).

Annex Table 3. Labor Market Indicators by Age and Sex Groups (%)

			Indonesia*			Malaysia			Philippines			Thailand			Viet Nam		
			EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR
Q4 2019	15 – 24	Male	46.3	18.4	56.7	48.3	8.8	52.9	39.2	12.1	44.6	46.3	4.4	48.4	55.0	6.7	58.9
		Female	32.0	19.0	39.5	33.8	11.6	38.3	24.9	14.1	29.0	32.2	6.2	34.3	50.2	6.3	53.5
		Total	39.3	18.6	48.3	41.4	9.9	45.9	32.3	12.8	37.0	39.3	5.1	41.4	52.7	6.5	56.3
	25 and over	Male	88.3	2.9	90.9	89.9	1.9	91.6	84.0	3.1	86.7	80.8	0.6	81.3	84.6	1.3	85.7
		Female	54.0	2.5	55.3	61.5	1.7	62.6	53.1	2.7	54.6	63.1	0.4	63.4	73.7	1.3	74.7
		Total	71.0	2.7	73.0	76.2	1.8	77.6	68.5	2.9	70.5	71.6	0.5	71.9	79.0	1.3	80.1
Q1 2020	15 – 24	Male	48.1	16.7	57.8	44.6	10.6	49.9	38.9	13.5	45.0	44.1	4.9	46.4	54.3	6.4	58.0
		Female	33.0	15.6	39.2	31.8	11.7	36.0	25.4	14.0	29.5	32.3	5.3	34.1	48.0	7.8	52.0
		Total	40.8	16.3	48.7	38.5	11.0	43.3	32.3	13.6	37.4	38.3	5.1	40.3	51.2	7.0	55.1
	25 and over	Male	88.7	3.1	91.5	90.4	2.0	92.2	83.0	3.9	86.4	81.0	0.7	81.6	84.2	1.2	85.2
		Female	57.3	2.6	58.8	61.7	1.8	62.9	53.6	3.3	55.4	63.6	0.5	64.0	71.7	1.4	72.7
		Total	72.9	2.9	75.0	76.5	1.9	78.1	68.2	3.7	70.8	71.9	0.6	72.3	77.8	1.3	78.8
Q2 2020	15 – 24	Male				42.8	12.6	49.0	27.8	30.7	40.1	44.5	7.9	48.3	52.9	7.1	57.0
		Female				31.5	12.3	35.9	16.4	32.8	24.4	29.4	9.9	32.6	46.2	6.9	49.6
		Total				37.4	12.5	42.8	22.2	31.5	32.4	37.0	8.7	40.5	49.7	7.0	53.4
	25 and over	Male				88.7	3.2	91.6	67.7	16.5	81.2	80.7	1.3	81.7	79.7	1.9	81.2
		Female				59.3	4.1	61.8	41.8	12.5	47.8	62.7	1.2	63.4	67.5	2.1	68.9
		Total				74.5	3.6	77.3	54.7	15.0	64.4	71.3	1.2	72.1	73.4	2.0	74.9
Q3 2020	15 – 24	Male	44.7	20.8	56.4	44.0	11.7	49.9	37.8	19.8	47.1	44.4	7.4	48.0	51.9	5.7	55.0
		Female	32.5	19.9	40.6	28.5	13.9	33.1	22.3	26.5	30.3	30.6	9.4	33.8	45.4	9.1	50.0
		Total	38.6	20.5	48.6	36.6	12.6	41.8	30.2	22.4	38.9	37.6	8.2	41.0	48.8	7.2	52.6
	25 and over	Male	85.1	5.1	89.7	88.6	3.4	91.7	79.2	7.9	86.0	81.3	1.3	82.4	82.4	1.3	83.5
		Female	54.4	3.8	56.5	61.3	2.9	63.2	51.4	6.7	55.0	64.2	1.2	65.0	69.3	2.2	70.8
		Total	69.7	4.6	73.1	75.5	3.2	77.9	65.2	7.4	70.5	72.4	1.2	73.3	75.6	1.7	76.9

			Indonesia*			Malaysia			Philippines			Thailand			Viet Nam		
			EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR	EPR	UR	LFPR
Q4 2020	15-24	Male				45.0	11.4	50.7	33.3	18.7	40.9	47.0	7.1	50.5	49.7	5.2	52.4
		Female				28.4	15.1	33.4	21.1	20.6	26.6	32.7	8.1	35.6	44.4	9.2	48.8
		Total				37.0	12.8	42.4	27.3	19.4	33.9	39.9	7.5	43.2	47.1	7.1	50.7
	25 and over	Male				88.3	3.5	91.4	78.5	6.8	84.2	81.5	1.2	82.5	83.6	1.1	84.5
		Female				61.3	2.8	63.1	48.2	6.7	51.6	64.5	1.2	65.3	70.3	2.1	71.8
		Total				75.3	3.2	77.8	63.3	6.8	67.9	72.6	1.2	73.5	76.7	1.6	78.0
Q1 2021	15-24	Male	44.8	19.3	55.5	45.9	11.9	52.1				43.4	6.1	46.2	44.3	7.4	47.8
		Female	33.9	16.2	40.5	29.2	12.4	33.3				30.5	7.5	33.0	38.5	6.9	41.4
		Total	39.4	18.0	48.1	37.9	12.1	43.2				37.0	6.7	39.7	41.5	7.2	44.7
	25 and over	Male	85.4	4.7	89.5	88.3	3.3	91.3				80.1	0.9	80.9	78.8	1.7	80.2
		Female	55.7	3.4	57.7	60.8	3.6	63.0				63.6	0.8	64.1	65.2	1.3	66.1
		Total	70.5	4.2	73.6	75.0	3.4	77.6				71.5	0.9	72.1	71.7	1.5	72.8
Q2 2021	15-24	Male													42.7	7.2	46.0
		Female													37.0	7.7	40.1
		Total													39.9	7.4	43.1
	25 and over	Male													79.0	1.8	80.5
		Female													64.7	1.9	66.0
		Total													71.6	1.8	72.9

Note: EPR = Employment-to-population ratio; UR = Unemployment rate; LFPR = Labor force participation rate
Malaysia working population is 15-64 years old; other countries, 15+ years old.
*Indonesia Q4 2019 is Aug-2019; Q1 2020 is Feb-2020; Q3 2020 is Aug-2020; Q1 2021 is Feb-2021.
Source: Labor force surveys of various countries; International Labour Organization. ILOSTAT. Short-Term Labour Force Statistics (STLFS). https://ilostat.ilo.org/data/ (accessed 26 November 2021).

Annex Table 4. Job gains by Sector ('000s)

	Q3-2020 vs. Q2-2020				Q4-2020 vs. Q3-2020			
	Wage and salary workers	Self-employed	Employer	Unpaid family worker	Wage and salary workers	Self-employed	Employer	Unpaid family worker
Indonesia								
Agriculture	-769	688	-13	647				
Mining and quarrying	55	-38	-6	-15				
Manufacturing	353	20	90	-122				
Utilities	177	248	17	28				
Construction	6,810	273	334	23				
Wholesale and retail	-151	12,279	888	4,079				
Transport and storage	-4,180	-10,300	-1,023	-3,892				
Accommodation and food service	-699	2,083	294	1,897				
Information and communication	-1,302	-4,175	-285	-1,697				
Financial and insurance	824	-188	-25	-31				
Real estate	-1,212	121	2	2				
Professional, scientific and t	-254	-79	43	-8				
Administrative and support ser								
Public administration	88	0	0	0				
Education	421	42	-3	4				
Human health and social work	253	33	16	0				
Other services*	-22	6	17	-54				
Net change in the number of employed ('000s)	**390**	**1,012**	**347**	**861**				
Sector share in gross job gains (%)	***15%***	***39%***	***13%***	***33%***				
Philippines								
Agriculture	588	698	343	476	-295	-235	174	-750
Mining and quarrying	77	10	2	0	-55	-30	-2	-1
Manufacturing	531	54	31	58	-291	-7	4	-50
Utilities	27	0	0	0	4	1	0	0
Construction	1,235	-2	5	1	-68	4	6	1
Wholesale and retail	558	1,367	65	443	-39	-117	11	-363
Transport and storage	255	57	3	5	-88	10	-6	-5
Accommodation and food service	-92	86	-4	55	103	-46	28	-22
Information and communication	45	-10	0	4	149	-3	6	-5
Financial and insurance	114	5	1	1	47	-2	0	-2
Real estate	16	37	0	1	-12	-28	0	-1
Professional, scientific and t	8	1	1	6	58	-11	-1	-6
Administrative and support ser	27	2	4	-1	191	9	-2	1
Public administration	76	0	0	0	-131	0	0	0
Education	47	5	-2	0	262	6	1	0
Human health and social work	79	5	-1	1	37	12	7	-1
Other services*	9	52	3	2	76	-1	2	0
Net change in the number of employed ('000s)	**3,599**	**2,369**	**452**	**1,051**	**-52**	**-438**	**229**	**-1,204**
Sector share in gross job gains (%)	***48%***	***32%***	***6%***	***14%***			***100%***	

	Q3-2020 vs. Q2-2020				Q4-2020 vs. Q3-2020			
	Wage and salary workers	Self-employed	Employer	Unpaid family worker	Wage and salary workers	Self-employed	Employer	Unpaid family worker
Thailand								
Agriculture	-60	414	-7	735	159	-11	6	-279
Mining and quarrying	0	1	0	-1	51	6	1	1
Manufacturing	-192	-45	-4	-11	85	32	6	34
Utilities	1	-1	2	0	42	8	1	3
Construction	-70	-15	16	28	125	9	-15	-27
Wholesale and retail	63	-25	11	8	36	-4	1	25
Transport and storage	33	11	5	7	-10	5	-4	-3
Accommodation and food service	24	-2	-1	59	-25	42	15	-4
Information and communication	-25	1	-5	0	-6	2	2	2
Financial and insurance	18	1	0	0	-9	7	3	2
Real estate	5	1	-1	1	14	13	8	0
Professional, scientific and t	-10	-1	-2	-2	-1	24	4	9
Administrative and support ser	7	12	-5	3	-15	2	3	-4
Public administration	-31	0	0	0	-24	0	0	0
Education	-56	3	1	2	8	-2	-1	-1
Human health and social work	11	0	-2	-1	38	14	-2	1
Other services*	-59	1	0	3	-6	-35	8	-4
Net change in the number of employed ('000s)	**-341**	**354**	**9**	**831**	**461**	**112**	**37**	**-246**
Sector share in gross job gains (%)		***30%***	***1%***	***70%***	***76%***	***18%***	***6%***	
Viet Nam								
Agriculture	103	655	7	-508	131	-338	-23	-20
Mining and quarrying	6	4	2	0	-5	-2	0	2
Manufacturing	341	105	-29	-47	349	62	-38	17
Utilities	-9	-3	-4	-2	8	7	0	3
Construction	252	-3	-13	-4	57	-14	16	-2
Wholesale and retail	117	311	-12	-97	41	13	-44	-8
Transport and storage	-51	34	-12	-1	99	58	11	0
Accommodation and food service	122	-7	-5	-31	-13	66	-15	-4
Information and communication	11	-1	0	3	1	1	0	0
Financial and insurance	-24	-3	-1	-3	46	4	-2	1
Real estate	-1	29	5	-2	20	7	-3	-2
Professional, scientific and t	1	3	-1	3	34	-2	2	-1
Administrative and support ser	16	13	2	-4	27	12	3	8
Public administration	37	-1	0	0	-22	-1	0	1
Education	77	-2	6	2	27	3	0	1
Human health and social work	26	8	8	2	-10	-9	-8	-2
Other services*	46	53	-3	-9	66	-12	4	14
Net change in the number of employed ('000s)	**1,071**	**1,194**	**-51**	**-697**	**858**	**-144**	**-99**	**8**
Sector share in gross job gains (%)	***47%***	***53%***			**1,584**	**51**	**-175**	**37**

Source: Labor force survey, various countries

Annex Table 5: Selected Labor Market and Employment Protection Policy Responses to COVID-19

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
Indonesia								
Wage Subsidy Program for Workers[a]	Active social security members with earnings of less than Rp5 million per month to receive wage subsidies for 4 months	4 Aug 2020	27 Aug 2020	• Active members of the BPJS with income of less than Rp5 million per month • Contract workers, teachers, firefighters, hotel workers, nurses, and cleaning staff (except for civil servants in these categories)	11,900,000	8.7%	• Bimonthly wage subsidy of Rp1,200,000 (Rp600,000 or $114.70 PPP per month) • Maximum monthly benefit amount as share of GDP per capita: 12% • Benefit percentage of average wage: 20.6%	Rp37.7 trillion / State budget
Preemployment Card Program	• Cash for training or other job incentives (ALMP) • Requires online registration	25 Feb 2020	9 Apr 2020	• Indonesian citizens aged 18 years or older not currently attending formal education • Workers affected by layoffs, workers in the tourism sector, workers in micro or small sectors affected by the COVID-19 crisis, and workers who need job skills development • Indonesian returning migrant workers from Malaysia, Singapore, and Hong Kong, China	5,600,000	4.1%	• Rp600,000 ($114.70 PPP) per month for completing training and Rp150,000 ($28.68 PPP) for completing three evaluation surveys. [5] • Maximum monthly benefit amount as share of GDP per capita: 12% • Benefit percentage of average wage: 20.6%	Rp20 trillion / National economic recovery budget
Wage Subsidy Program for Educational Personnel	Wage subsidy program to support frontline workers in education	17 Nov 2020	1 Nov 2020	• Indonesian citizens, non-civil servants, with income below Rp5 million per month, are not a beneficiary of the Wage Subsidy Program of the Ministry of Manpower, not a beneficiary of the preemployment card as of 1 Oct 2020	1,999,000	1.5%	• Rp1,800,000 per month ($344 PPP) • Maximum monthly benefit amount as share of GDP per capita: 35.9% • Benefit percentage of average wage: 61.8%	Rp3,670,000

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
Safety Program by the National Police	Cash transfer to taxi, bus, and truck drivers	31 Mar 2020	15 Apr 2020	Taxi, bus, and/or truck drivers and bus driver assistants	197,000	0.14%	• Rp600,000 per month ($114.70 PPP) • Maximum monthly benefit amount as share of GDP per capita: 12%	Rp360 billion
Malaysia								
Wage Subsidy Program	Employment Retention Program: Subsidized wages of employees insured under the Social Security Organization (SOCSO) Employment Insurance Scheme (EIS) to assist employers in retaining their workers during the COVID-19 crisis	TBV	20 Mar 2020	• Phase 1: Employees earning RM4,000 or less who contribute to SOCSO's EIS, and whose employers are experiencing more than 50% decrease in their income since 1 Jan 2020, and do not retrench, impose unpaid leave, or force a wage cut on their employees from the start of the subsidy • Phase 2: Employees earning RM4,000 or less who contribute to SOCSO's EIS and whose employers are still affected by the pandemic, and who since the Recovery Movement Control Order are still facing lower revenues of at least 30% compared with 2019; companies registered with the SOCSO before 1 Sep 2020 and registered with the Companies Commission Malaysia or the relevant local authority before 1 Sep 2020 • Employers are forbidden to retrench workers earning RM4,000 or less but can reduce working hours or wages if their workers agree after a negotiation	3,940,000	24.7%	• RM600 (PPP $353.82) a month per worker to firms with more than 200 employees • RM800 ($471.76 PPP) a month per worker to firms with 76–200 employees • RM1,200 ($707.64 PPP) a month per worker to firms with less than 76 employees • Maximum monthly benefit amount as share of GDP per capita: 15.5% • Benefit share of average wage: 38.6%	Phase 1: RM5.9 billion; Phase 2: RM2.4 billion / Part of second stimulus package of RM25 billion (1.7% of GDP)
Special Allowance to Frontline Workers	Health care and other frontline workers to receive a monthly allowance until the end of the COVID-19 outbreak	27 Feb 2020	1 Mar 2020	Doctors and other medical personnel, frontline personnel like immigration officers at entry points directly involved in the management and containment of the outbreak	17,000	0.11%	• Initially RM400 and RM200 ($235.88 PPP and $117.94) to doctors and other medical personnel and	Not available

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
							frontline personnel, respectively • Later increased to RM600 to health-care personnel and RM400 to the other categories ($353.81 PPP and $235.88 PPP, respectively) • Maximum monthly benefit amount as share of GDP per capita: 15.5% • Benefit share of average wage: 11.5%	
Childcare subsidy	A new program to support working parents of young children through the subsidy of childcare expenses	5 Jun 2020	1 Jun 2020	Households with young children and working parents	5,000	Not available	• eVouchers of RM800 ($471.76 PPP) per household for mobile childcare services, and increase in income tax relief for parents on childcare services expenses • Maximum monthly benefit amount as share of GDP per capita: 20.6% • Benefit share of average wage: 25.9%	RM200 million
Hiring and Training Assistance for Businesses	Support to employers to hire and train unemployed persons during the COVID-19 crisis	5 Jun 2020	31 Aug 2020	• Employers must be registered under the SSM or other authorities and SOCSO before 1 Jun 2020 • Applications for the incentives are based on the employee list within that registration	300,000	1.9%	• RM600 to RM1,000 ($353.82 PPP to $589.70) of monthly allowance and RM4,000 ($2,358.80 PPP) as a one-off training allowance	RM1.5 billion

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
				• Youth: school leavers and graduates • Unemployed persons: all ages or with disabilities • Non-eligible are the following: (i) employees currently receiving Employment Retention Program assistance, (ii) listed in the Subsidy Program Wages; (iii) those who resign voluntarily; (iv) internship students who have not yet completed their employment; (v) parents, spouses, siblings or children taken as employees; (vi) employees who once worked and were recruited to work with the same employer			• Maximum monthly benefit amount as share of GDP per capita: 25.8% • Benefit share of average wage: 32.4%	
Philippines								
COVID-19 Adjustment Measures Program (CAMP)	Cash aid for affected workers of private establishments that implemented flexible work arrangements or suspended business operations due to the pandemic	17 Mar 2020	20 Mar 2020	Workers of private establishments that implemented flexible work arrangements or suspended business operations (temporary closure) due to the pandemic	657,201	1.4%	• ₱5,000 ($248.52 PPP) • Maximum monthly benefit amount as share of GDP per capita: 34.7% • Benefit share of average wage: 34.0%	₱3.286 billion
COVID-19 Hazard Pay	Hazard pay for public health workers serving in the frontlines	23 Mar 2020	17 Mar 2020	• Personnel who physically report for work during the implementation of an enhanced community quarantine (ECQ) • Personnel occupying regular, contractual, or casual positions; those engaged through contract of service, job order, or other similar schemes	703	0.002%	• ₱500 per day or ₱11,000 per month (22 working days). Equivalent $546.74 PPP • Maximum monthly benefit amount as share of GDP per capita: 76.3% • Benefit share of average wage: 74.9%	₱15 million / Department of Health (DOH)
Small Business Wage Subsidy	Wage subsidy to employees in small businesses affected by the ECQ	14 Apr 2020	1 May 2020	• Small businesses[b] under both Category A (non-essentials) and Category B (quasi-essentials) can apply for the wage subsidy for	3,400,000	7.4%	• ₱5,000 to ₱8,000 ($248 to $397 PPP) • Maximum monthly benefit amount as	₱50.8 billion / Bayanihan 1

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
				employees who did not work and did not get paid during the ECQ • Employees who fulfill <u>all</u> of the following criteria are eligible: (i) employee of an eligible small business; (ii) employed and active as of 1 Mar 2020 but unable to work due to the ECQ; (iii) did not get paid by their employer for at least 2 weeks during the temporary closure or suspension of work under Labor Advisory No. 1, Series of 2020; (iv) of any contract status (e.g., regular, probationary, regular seasonal, project-based, fixed-term); (v) certified by the employer in the application as having met all the above criteria			share of GDP per capita: 55.5% • Benefit share of average wage: 54.5%	
COVID-19 Special Risk Allowance	Allowance for workers providing care to COVID-19 patients	25 Mar 2020	1 Feb 2020	• Public and private health workers directly catering to or in contact with COVID-19 patients[c] • Private health workers assigned in the designated COVID-19 units of hospitals, laboratories, or medical and quarantine facilities as certified by the Department of Health	TBV	TBV	₱5,000	TBV / Part of ₱13.5 billion appropriated under Section 10a of RA No. 11494 for health-related responses to COVID-19
Thailand								
Rao Mai Ting Kan	Informal workers not insured under the Social Security Fund (SSF) can apply to receive a cash transfer for 3 months during the State of Emergency	25 Mar 2020	1 Apr 2020	• Thai informal workers: temporary, contractors, or self-employed workers	14,500,000	37.1%	• B5,000 ($388.40 PPP) • Maximum monthly benefit amount as share of GDP per capita: 24.1% • Benefit share of average wage: 32.9%	TBV / Part of B200 billion stimulus measure approved by cabinet 24 Mar 2020

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
Subsidies to Salaries of New Graduates	Wage subsidies to new graduates in companies insured under the SSF	8 Sep 2020	31 Oct 2020	• New graduates from universities and vocational colleges not older than 25 years old, unless they graduated in 2019 or 2020 • Companies entitled to participate in the program must be in the social security system and must not lay off more than 15% of their staff during the 1-year period	260,000	0.7%	• Salaries set at B15,000 for university graduates, B11,500 for graduates with advanced vocational certificates, and B9,400 for graduates with standard vocational certificates • The government to pay 50% of salaries for new graduates during the 1-year period (Equivalent $582.60 to $365.10 PPP) • Maximum monthly benefit amount as share of GDP per capita: 72.2% • Benefit share of average wage: 49.3%	B23.48 billion / Loan from the Ministry of Finance
Viet Nam								
Unemployment Benefits	3-month unemployment benefits to workers whose contract was suspended or who took unpaid leave	9 Apr 2020	9 Apr 2020	Workers whose employment contract was suspended or who took unpaid leave for at least 1 month because the employer lacks funds to pay wages due to COVID-19	Not available	Not available	• D1,800,000 ($224.39 PPP) • Maximum monthly benefit amount as share of GDP per capita: 33.9% • Benefit share of average wage: 2.0%	TBV / Part of stimulus package of D62 trillion
Anti-Epidemic Allowance Regime	Allowance for workers involved in prevention and control of COVID-19	29 Mar 2020	29 Mar 2020	• Group 1: *Persons who go to epidemic supervision, investigation and verification; people directly examining, diagnosing, and treating infected*	Not available	Not available	• Varies from D80,000 to D300,000 per day depending on the	TBV / Part of the D6.7 trillion stage budget

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
				people at medical examination and treatment establishments • Group 2: *Transporters of patients and medical products; preserving the patient's corpse; clothes washers, doctors, patients; collection of chemical bottles, jars and boxes; protection of isolation treatment areas; cleaning, disinfecting and destroying pathogens in isolation areas at medical examination and treatment establishments; health workers performing epidemiological surveillance and medical monitoring at home; medical isolators and medical isolators as designated by state management agencies.* • Group 3: *Persons performing the tasks (not being medical professionals) at the concentrated isolation facility (not applicable to isolation at home, accommodation, hotel, resort, business); participants in the enforcement of medical isolation in case the isolation measure must be applied but fails to comply with the medical isolation measure; Interpreters, emergency team 115, quarantine crew* • Group 4: *participants who are always anti-epidemic 24/24 hours, namely medical staff, the military, the police, performing their duties at the concentrated medical isolation facility (not applicable to the isolation at home, accommodation, hotel, resort, enterprise); participants performing the task of diversifying and carrying out procedures for people entering; guardians of*			workers occupation. • D1,936,000 to D6,600,000 per month (22 working days), equivalent up to $1,137.52 PPP) • Maximum monthly benefit amount as share of GDP per capita: 124% • Benefit share of average wage: 137%	

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Labor Force	Benefit Amount	
				isolated areas in residential areas as designated by state management agencies; medical staff who are on duty 24/24 at medical isolation treatment facilities to take care of and treat sufferers and suspects of COVID-19 • Group 5: *training regime for collaborators and volunteers participating in the fight against epidemics during the COVID-19 epidemic*				

ALMP = active labor market program, GDP = gross domestic product, PPP = purchasing power parity, SSM = Companies Commission Malaysia.

[a] The first transfer reached only 2.5 million workers, and the government aimed to reach more than 15 million. The Ministry of Manpower, employers, and BPJS integrated members' account details to the BPJS account in less than a month. [3]

[b] The small business must not be in the BIR's Large Taxpayer Service list. Employers in areas where other forms of quarantine have been put in place by the local government may also qualify.

[c] These include civilian employees occupying regular, contractual, or casual positions, whether full or part-time; workers engaged though contract of service or job order, including duly accredited and registered barangay health workers, who are assigned to hospitals, laboratories or medical and quarantine facilities, and whose official duties and responsibilities are directly related to the health-care response of the government to COVID-19.

Source: International Policy Centre for Inclusive Growth. 2021 Social Protection Responses to COVID-19 in the Global South. Mapping table. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 9 November 2021).

Annex Table 6. Social Assistance – Large-Scale Emergency Cash and In-Kind Transfers

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
Indonesia								
Family Hope Program (PKH) (*preexisting program)*	• Coverage of the PKH, the flagship conditional cash transfer program, was increased, as were the level of benefits disbursed	31 Mar 2020	8 Apr 2020	• Targets poor households (HHs) with pregnant women, children, severely disabled persons, and/or elderly persons aged 70 years or older[a]	• Existing beneficiaries: 9,066,786 with additional 800,000 • Vertical expansion (VE) top-up for 9,066,786	3.4% plus 1.2%	• Regular assistance: Rp129,167 PPP (in constant 2017 dollars) $25 per month for every HH • Components (per month): Rp312,500 to pregnant women or children aged 0–6 years; Rp93,750 to children in elementary school; Rp156,250 to children in junior high school; Rp208,333 to children in senior high school; Rp250,000 to persons with severe disability or elderly persons aged 70 years or older • Each eligible family can receive a maximum of four benefits • Maximum benefit per month: Rp1,129,167.00 • Benefit as share of average HH income: 0.11 • Benefit as share of average HH consumption expenditure: 0.14	Rp37.4 trillion / Fiscal package

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
							• VE: top-up of benefits: 25% to 56%	
BLT Village Fund Cash Assistance (*preexisting program)*	Cash transfer to low-income households that did not receive assistance from other programs[b]	18 Apr 2020	Could not be verified: disbursement made for April, May, June	Poor persons who live in the villages and have not received social assistance from programs amid the COVID-19 crisis	• 6,881,778 beneficiaries in June 2020 versus expected number of beneficiaries 12,347,000	2.5% to increase to 9.9%	• Rp600,000 from April to June and Rp300,000 from July to December. $114.70 PPP from April to June and $57.35 PPP from July to December • Benefit as share of average HH income: 0.11 • Benefit as share of average HH consumption expenditure: 0.14	Rp22,4 trillion / Village funds
Staple food card	Increased coverage of food transfers[c]	8 Apr 2020 *(preparing staple food for people across the country)* 25 Mar 2020 *(increasing the allowance from Rp150,000 to Rp200,000)*	1 Mar 2020 1 Mar 2020	• Poorest 25% of households or with the lowest socioeconomic status • Card allows poor families to buy basic dietary items from electronic shops	• Existing: 15,200,000 • New: 4,800,000	5.6% expanded to 6.9%	• Rp200,000 ($38.23 PPP) Benefit as share of average household income: 0.02 • Benefit as share of average HH consumption expenditure: 0.03 • Benefit increased by 36%	Rp43.6 trillion / Fiscal package
Malaysia								
Bantuan Sara Hidup (BSH) (*existing program)*	Coverage of the BSH increased to an additional 1.2 million households and previous beneficiaries received a top-up	27 Feb 2020 *(First stimulus package, which includes*	31 Mar 2020	• Household - married couple *A. The applicant: Malaysian citizen. Resident in Malaysia. Income group: Monthly household income less than RM4,000.* *B. Spouse of applicant: Malaysian citizen. For non-Malaysian spouse*	• Existing: 4,300,000 (in 2019) • New: additional 1,200,000	52.5% (plus 14.6%)	• HHs earning below RM2,000/month: RM1,000 per year • HHs earning RM2,001–RM3,000/month: RM750/year	RM3.2 billion / Malaysian government

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
		BSH program) 27 Feb 2020 *(vertical expansion)*	1 May 2020 *(Date of payment)*	*must be resident and holder of MyPR/MyKAS.* *C. Child/children of applicant with a foreign spouse must have MyKid/MyKad. Biological child/children registered with Jabatan Pendaftaran Negara. Adopted child/children registered with Jabatan Pendaftaran Negara. Must be Malaysian citizen. Below 17 years of age. Not employed and without a source of income. Below 18 years of age. Full-time student studying at public/private institution of higher learning.* • Individuals *A. The Applicant: Single. Malaysian citizen. Resident of Malaysia. Monthly household income less than RM2,000.*			• HHs earning RM3,001–RM4,000/month • Benefit as share of average HH income: 0.01 • Benefit as share of HH income of the lowest quintile: 0.04 • Benefit as share of average HH consumption expenditure: 0.02 • Benefit as share of HH consumption expenditure of the lowest quintile: 0.04 • Benefit increased by 15%	
Bantuan Prihatin Nasional (BPN) (*new intervention*)	• Cash transfer to middle-class workers and low-income households • In 2021, it was replaced by the Bantuan Prihatin Rakyat (BPR)	27 Mar 2020	30 Apr 2020	Low-income households or single individuals in the middle 40% of workers (middle-class) or the bottom 40% of earners (lower class)	10,600,000 as of 23 Sep 2020	33.2%	• RM1,600 to HHs earning less than RM4,000 per month • RM1,000 to HHs earning RM4,000–RM8,000 per month • RM800 to single individuals aged 21 years and above earning less than RM2,000 per month • RM500 to single individuals aged 21 years and above earning RM2,000–RM4,000 per month • Benefit as share of average HH income: 0.20	RM10 billion / Part of second stimulus package of RM25 billion (1.7% of GDP)

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
							• Benefit as share of HH income of the lowest quintile: 0.69 • Benefit as share of average HH consumption expenditure: 0.35 • Benefit as share of HH consumption expenditure of the lowest quintile: 0.81	
Philippines								
Social Amelioration Program (SAP): linked to existing Pantawid Pamilyang Pilipino Program (4Ps) and Rice Subsidy	Cash transfers to 18 million low-income households with members in the informal market affected by the lockdown for 2 months (conditionality waived)	24 Mar 2020	15 Apr 2020	• Low-income households in areas under granular lockdown and households with recently returned overseas Filipino workers (OFWs) • Families qualified to receive the emergency subsidy should have at least one member who is a senior citizen, a person with disability, pregnant or lactating woman, solo parent, or overseas Filipino in distress • Households who are indigenous peoples or who belong to underprivileged and vulnerable sectors are also qualified to receive the emergency subsidy	• 4,353,597 existing plus 13,300,000 • New: 4,353,597	16.9% plus 51.7%	• ₱5,000–₱8,000 ($248.52–$397.64 PPP) a month (depending on the prevailing regional minimum wage and considering the current conditional cash transfer grants and rice subsidies) • Benefit as share of average HH income: 0.30 • Benefit as share of HH income of the lowest quintile: 0.72 • Benefit as share of average HH consumption expenditure: 0.39 • Benefit as share of HH consumption expenditure of the lowest quintile: 0.78	Not available

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
							• Extra benefit: $290 PPP (233% to 372%)	
Emergency Subsidy Program (ESP) (*new intervention*)	Families and individuals affected by COVID-19, who did not qualify for SAP, received family food packs and nonfood items, including cash	19 Mar 2020	30 Mar 2020	• Families classified as low-income households by their local government units (LGUs) but were not qualified to receive SAP • LGUs that have requested for augmentation in support amid the enforcement of community quarantine due to the COVID-19 outbreak	• 628,243 non-4Ps families in Northern Mindanao (national level total to be verified) • Luzon: 49,039 received cash aid by 3 Jan 2021	Not available	• One-time cash grant of ₱5,000 to ₱8,000 ($248.52–$397.64 PPP) • 190,000 food packs in Luzon and 4,501,585 food packs and in Northern Mindanao • Benefit as share of average HH income: 0.30 • Benefit as share of HH income of the lowest quintile: 0.72 • Benefit as share of average HH consumption expenditure: 0.39 • Benefit as share of HH consumption expenditure of the lowest quintile: 0.78	₱1.3 billion /Quick Response Fund from DSWD Central Office
Thailand								
Rao Chana	Low-income persons affected by the COVID-19 pandemic, mainly self-employed persons, farmers, and state welfare cardholders received weekly payments for 2 months	19 Jan 2021	18 Feb 2021 *(Date of first payment for applicants who are current Pao Tang users and new applicants)* 5 Feb 2020	• Low-income persons affected by the COVID-19 pandemic, mainly self-employed persons, farmers, and state welfare cardholders. • Eligibility requirements: *(1) Thai national, aged at least 18 years; (2) must not be insured under Section 33 of the Social Security Act; (3) must not be a government officer, government employee, state enterprise employee, political official, or people on a state pension. Applicants must have an annual income not exceeding B300,000 and bank*	• 13,700,000 (existing welfare card holders) • New:[c] 21,500,000 • Welfare card holders: 13,700,000	19.7% plus 30.9%	• B3,500 ($271.88 PPP) per month for 2 months • Benefit as share of average HH income: 0.13 • Benefit as share of HH income of the lowest quintile: 0.45 • Benefit as share of average HH consumption expenditure: 0.17	B213.24 billion / B210.20 billion (1st phase) plus B3.04 billion (extension approved on 20 April 2021)

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	Date Implemented	Eligibility (Target Group/Fills social protection gap?)	Number of Beneficiaries	% Population	Benefit Amount	
			(Date of first payment for welfare card holders)	*savings not exceeding B500,000 (information will be checked back to 31 Dec 2019)*			• Increase from standard benefit: 338%	
Viet Nam								
Cash payments	Cash payments to vulnerable households, persons with meritorious services, and workers affected by the COVID-19 crisis	9 Apr 2020	1 Apr 2020	• Provisions for people with meritorious services to the revolution and beneficiaries of other social protection programs • Meritorious service eligibility: *a) People who participated in the revolution before 1 January 1945; b) participated in the revolution from 1 January 1945 to before the General uprising of 19 August 1945;c) Martyrs; d) Vietnamese heroic mothers; e) People's Armed Forces Hero, Labor Hero; e) Invalids and policy beneficiaries such as war invalids; g) Diseases; h) Resistance activists are infected with toxic chemicals; i) People engaged in revolutionary activities and resistance activities were arrested and exiled by the enemy; k) People engaged in resistance war for national liberation, defense of the Fatherland and performing international obligations; l) People with meritorious services to the revolution; Relatives of persons with meritorious services to the revolution specified in Clause 1 of this Article Relatives of persons with meritorious services to the revolution specified in Clause 1 of this Article*	• Previous recipients: 1,400,000 • Additional 8,400,000[d]	Going to 33.1%	• Poor and near poor HHs: D250,000/person/ month ($31.17 to $224.40 PPP) • Benefit as share of average HH income: 0.20 • Benefit as share of average HH consumption expenditure: 0.12	D36 trillion / Part of stimulus package of D62 trillion

[a] Coverage expansion eligibility details not available.

[b] Cash transfer was provided for 3 months, and then extended for another 3 months, to poor persons living in villages or rural areas in Indonesia, mainly farmers. The BLT program aimed to maintain the purchasing power of persons living in villages affected by the COVID-19 crisis; 80% of the beneficiary families are low-income and have never received government assistance.
[c] Number of participants as of 22 April 2021 minus number of Welfare Card holders covered (13.7 million are holders of state Welfare Cards); 16.8 million are new applicants and persons whose information is already in the Pao Tang application, and 2.3 million are persons who need special assistance or those registering without smartphones. In April, budget was approved to cover an additional 2.4 million persons. (16.8 + 2.3 + 2.4 = 21.5)
[c] Beneficiaries of the staple food card program received an additional transfer of Rp50,000 per month, a 25% increase relative to the standard benefit, through 9 basic commodity cards; by using the cards, the beneficiaries will be able to purchase and choose more diverse staple foods. [1] The budget increases to Rp1.80 million per family per annum from Rp1.32 million per family per annum in the previous year.
[d] Estimated coverage is 10 million (including 1.4 million persons with meritorious service and recipients of other social protection programs included as vertical expansion); 8.6 million for horizontal expansion.
Source: International Policy Centre for Inclusive Growth. 2021 Social Protection Responses to COVID-19 in the Global South. Mapping table. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 9 November 2021).

Annex Table 7. Social Insurance – Selected Policy Responses to COVID-19 in Southeast Asia

	Short Description	Timeliness		Coverage			Adequacy	Budget/ Cost/ Funding Source
		Date Announced	*Date Implemented*	*Eligibility (Target Group/Fills social protection gap?)*	*Number of Beneficiaries*	*% Population or Labor Force*	*Benefit Amount*	
Indonesia								
Subsidized national health insurance (JKN) (*linked to existing program)*	• Subsidies for health-care coverage from the central and regional governments • Almost half of the population of Indonesia, members of the BPJS and JKN, will receive subsidies for payment of health insurance premiums	18 May 2020	Not available	• National health insurance JKN) and BPJS Kesehatan (social security provider body). All Indonesian residents are required to become members of the National Health Insurance-Indonesian Health Cards (JKN-KIS) Program, managed by BPJS Kesehatan, including foreigners who have worked for at least 6 months in Indonesia and have paid dues • Poor persons, members of the JKN and BPJS identified as Class III patients, members classified as non-salaried employees (PBPU) and non-employees (BP) Class III	132,600,000	97%	Rp42,000 premiums per person ($8.03 PPP)	Rp33.3 trillion/Rp24.3 trillion financed by the federal government through allocation of state budget and Rp9 trillion financed by regional budget
Malaysia								
Employment Insurance System (EIS)	• Eligibility criteria of the EIS was relaxed concerning the provision of unemployment benefits for retrenched workers in COVID-19 affected	23 Mar 2020	1 Apr 2020	• Malaysian citizens, permanent residents in Malaysia, aged 18–60 years, working in the private sector, and employed based on a contract of service • Observations: Workers aged 57 years and above who have never	• 7,080,000 (in 2018) • Benefiting from intervention: 101,385	44% of labor force but only 0.6% of labor force	RM912,50 (daily training allowance of RM30) $538.10 PPP	Not available

	sectors, and the government increased the claimable training cost • Training fee ceiling increased from RM4,000 to RM6,000, and trainees will be provided with a training allowance of RM30 per day			paid contributions before that age are NOT covered by the EIS Act and are NOT required to contribute, the EIS Act does NOT cover domestic workers, the self-employed, civil servants, and workers in local authorities and statutory bodies		benefiting from intervention		
I-Lestari Withdrawal (contributory pensions)	• Employees Provident Fund (EPF) members can apply for early withdrawals of their own funds	12 Mar 2020	1 Apr 2020	• For EPF: Formal employees. Individuals who are employed, self-employed, or business owners can opt to contribute to the EPF based on their own requirements • For intervention: Malaysian citizens, permanent residents and non-Malaysians, 55 years old and below, have savings in Account 2	7,630,000 Benefiting from intervention: 3,510,000	48% of LF Benefiting from intervention: 22% of labor force	Maximum of RM500 per month ($294.85 PPP)	RM10 billion/ Employees Provident Fund
Philippines								
Unemployment benefits (SI)	Unemployment cash benefit for workers who lost their jobs due to the COVID-19 crisis	12 Mar 2020	12 Mar 2020	• Social Security System (SSS): Mandatory participation of private-sector employees, self-employed persons, and household workers • Voluntary coverage for citizens of the Philippines working abroad, persons who previously had mandatory coverage, and nonworking spouses of insured persons. • For intervention: Formal workers. Private sector workers rendered jobless by the COVID-19 pandemic, including HH helpers and OFWs who were laid off, terminated, or involuntary separated from their work. Eligibility: *The applicant must (i) be below 60 years old when they were removed from their job. For miners, they should be 50 years old or younger, while racehorse jockeys seeking the benefit must be aged 55 years or younger, (ii)*	18,360,000 million SSS members in 2018 Benefiting from intervention: 60,000	40% of labor force Benefiting from intervention: 0.1% of labor force	• Half of the worker's average monthly salary, up to ₱20,000 ($994.08 PPP). The average value is ₱11,000 • 38% of per capita GDP • 136% of average salary	₱1.2 billion/ Department of Labor and Employment

				have paid contributions to the SSS for at least 36 months, with at least 12 payments remitted in the last 18 months before they were booted out of work, (iii) not have received an unemployment benefit in the past 3 years when he/she applied for the perk				
Thailand								
Unemployment benefits (Force majeure)	Unemployment benefits for COVID-19 related contingencies affecting workers insured under the SSF	17 Apr 2020	31 Mar 2020	• Workers are insured and eligible to receive unemployment benefits: have to cease working temporarily between 1 Mar and 31 Aug 2020; do not receive wages from the employer during the temporary cessation; and, whose employment has not been terminated. • Workers in the following force majeure circumstances are eligible: The employee has to cease working because they are required to quarantine or comply with a COVID-19 preventive measure. The employer orders the cessation of the employee's work because the employer has to quarantine the employee, or the employer has to comply with a COVID-19 preventive measure. • Force majeure causes the employer to temporarily cease normal business operations, partially or wholly, because they decide to do so, or must do so to comply with an order in accordance with laws relating to communicable diseases or emergency public administration	New program beneficiaries 984,005	2.5% of labor force	• 62% of the monthly salary for up to 90 days, subject to an eligible monthly salary cap of B15,000; B9,300 per month ($629.42 PPP) • 45% of per capita GDP • 61.2% of average wage	Not available
Unemployment benefits (Economic crisis)	Insured employees under the SSF are entitled to receive benefits during periods of unemployment caused by the economic crisis between 1 Mar 2020 and 28 Feb 2022	17 Apr 2020	31 Mar 2020	Insured workers under the SSF who are unemployed between 1 Mar 2020 and 28 Feb 2022, and who have paid contributions for at least 6 of the prior 15 months counted from the date of unemployment	15,224 new beneficiaries	0.03% of labor force	• If employee is terminated: 70% of daily wages for up to 200 days; if employee resigns or their contract ends: 45% of daily	Not available

							wage for up to 3 months • Maximum daily wage is capped at B15,000 per month (B10,500 for up to 200 days; B6,750 for 3 months) • Max amount $710.64 PPP • 72% of per capita GDP • 69.1% of average wages	
Viet Nam								
Health Care for COVID-19 patients	Health Insurance Fund (HIF) Free care for persons (national and foreigners) under mandatory quarantine at isolation facilities	13 Mar 2020	13 Mar 2020	• COVID-19 patients in the country, nationals and foreigners • Targeting: Vulnerable individuals (children, elderly, disabled, refugees, internally displaced persons – not related to work, but to vulnerability)	83,922,036 (coverage if HIF in 2018) 1,521 actual beneficiaries (total number of cases in Viet Nam) by Jan 2021		87% of population <0.1% population	TBV / Part of the D6.7 trillion stage budget

Source: International Policy Centre for Inclusive Growth. 2021 Social Protection Responses to COVID-19 in the Global South. Mapping table. https://socialprotection.org/social-protection-responses-covid-19-global-south (accessed 9 November 2021).