

## ► Policy Brief

August 2021

# COVID-19 and the ASEAN labour market: Impact and policy response\*

### Key points

- ▶ The COVID-19 pandemic has caused disruption and hardship among workers and employers in the ASEAN region.<sup>1</sup> In the course of 2021, the region has gradually become one of the global epicentres of the pandemic and reached its highest number of COVID-19 cases and deaths at the time this brief was written.
- ▶ In 2021, the ASEAN region is projected to see working-hour losses of 7.4 per cent. This implies limited improvement compared with 2020, which recorded working-hour losses of 8.4 per cent. All countries in ASEAN have been affected by working-hour losses.
- ▶ In 2021, 9.3 million fewer workers are projected to be in employment in the region than expected in the absence of the pandemic, compared to 10.6 million fewer workers in 2020. However, the pandemic has not affected all workers to the same extent. Among the groups of workers who have been most impacted by job losses are women and young workers.
- ▶ Working-hour losses and job losses have caused millions of workers to lose their labour income or parts of it. In 2020, 7.8 per cent of labour income was lost in the ASEAN region.
- ▶ To tackle these unprecedented labour market disruptions and ensure a robust and inclusive socioeconomic recovery, ASEAN Member States adopted the ASEAN Comprehensive Recovery Framework (ACRF) in November 2020. The ACRF defines several regional priorities for action, including social protection, skills development, labour policies promoted through social dialogue, employment protection and rural agricultural productivity.
- ▶ The scope of national policies to cope with the crisis has been unprecedented in the ASEAN region. ASEAN Member States have responded to the COVID-19 crisis through a range of fiscal support measures, aimed at maintaining household income and consumption, protecting jobs, and supporting business sustainability through emergency financing.
- ▶ The Global Call to Action for a Human-centred Recovery, adopted at the International Labour Conference in June 2021, provides a framework for proposed actions within ASEAN Member States. The Call to Action is underpinned by the principles of inclusive economic growth and employment, protection of all workers, universal social protection and social dialogue, and it highlights the importance of enhanced international solidarity and regional cooperation.

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<sup>1</sup> ASEAN is the Association of Southeast Asian Nations, an economic union comprising the following 10 Member States: Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

## ► Introduction

The COVID-19 pandemic has caused disruption and hardship among workers and employers worldwide, as well as in the ASEAN region. Millions of livelihoods in the region have been severely impacted (ASEAN 2020a), as the regional economy contracted by a negative rate of -3.3 per cent in 2020, down from 4.5 per cent in 2019.<sup>2</sup> There are various channels through which ASEAN economies and labour markets have been impacted, including lockdown measures implemented by authorities to curb the spread of the virus, the dramatic decline in tourism, the decrease in domestic consumption as well as impacts through global supply chains.

In the course of 2021, with continuing waves of COVID-19 infections spurred by new variants, the ASEAN region has gradually become one of the global epicentres of the pandemic and had reached its highest number of COVID-19 cases and deaths at the time this brief was written (figure 1). Due to the deteriorating situation, the restrictiveness of measures that governments in ASEAN have taken to control the spread of COVID-19 increased in some countries of the region in April 2021 (figure 2). With a continuing upward trend in the number of new cases and a relatively slow vaccine roll-out in most countries of the region, the adverse impacts on economies and labour markets in the region are unlikely to fade away any time soon.

The purpose of this brief is to assess the labour market impact of the COVID-19 pandemic, focusing on working-hour and employment losses, increased unemployment and inactivity and labour income losses. The brief also describes the policy response of ASEAN and its Member States.

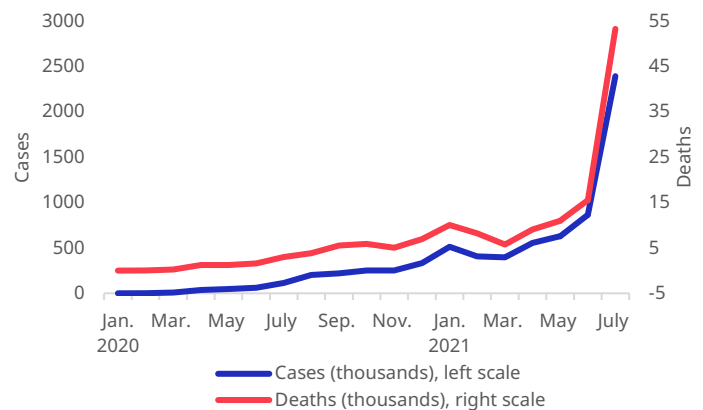
Ensuring that labour markets become more sustainable, inclusive and resilient against possible future crises will be key to building back better. In line with the [Global Call to Action for a Human-centred Recovery from the COVID-19 Crisis that is Inclusive, Sustainable and Resilient](#) (ILO 2021a), adopted at the International Labour Conference in June 2021, inclusive economic growth and employment, protection of all workers, universal social protection and

social dialogue are among the key principles moving forward.

### Structure of the brief

The next section discusses the labour market impact of COVID-19 on ASEAN and its Member States. The section thereafter describes the regional and national policy responses. The final section describes possible ways forward.

► **Figure 1. Number of new reported COVID-19 cases and deaths per month in the ASEAN region (thousands)**



Source: World Health Organization.

► **Figure 2. Restrictiveness of measures that governments in the ASEAN region have taken to contain COVID-19 transmission (index)**



Note: The line shows the simple average of the stringency index across ASEAN Member States.

Source: Oxford COVID-19 Government Response Tracker.

<sup>2</sup> ILO calculations based on International Monetary Fund (IMF), *World Economic Outlook, April 2021*.

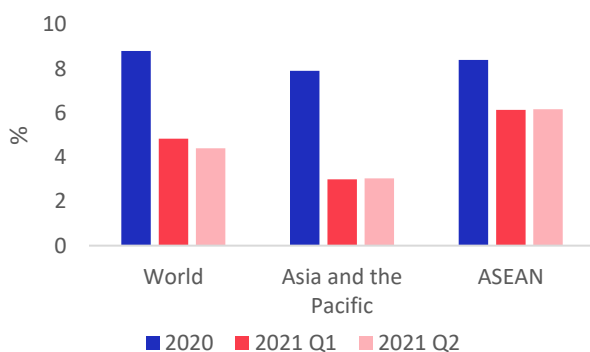
## ► The COVID-19 pandemic continues to hit the ASEAN labour market hard

### Working hours have dropped dramatically due to the pandemic

The working hours lost due to COVID-19 include the reduced hours of those workers that remained in employment but had to reduce their hours as the result of the pandemic, as well as those workers that lost their job and moved into either economic inactivity or unemployment. The impact of the pandemic on overall working hours hence provides a comprehensive picture of the hardships that the crisis has created for employers and workers, globally as well as in the ASEAN region.

In 2020, the ASEAN region recorded working-hour losses of 8.4 per cent relative to the fourth quarter of 2019, which is only marginally lower than the global losses of 8.8 per cent and slightly higher than the losses in the whole Asia-Pacific region of 7.9 per cent (figure 3). The working hours lost in the region due to the pandemic are equivalent to the working time of about 24 million full-time workers, assuming a 48-hour work week. In the first two quarters of 2021, the ASEAN region is estimated to

► **Figure 3. Decrease in working hours due to the pandemic (%)**



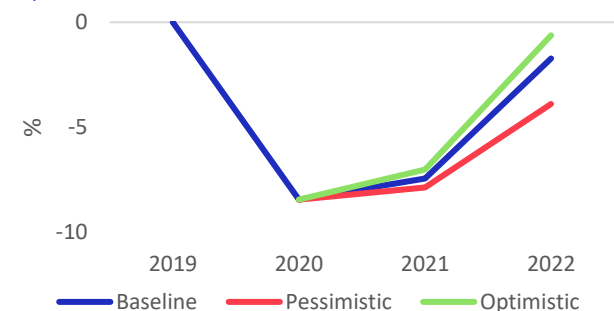
**Notes:** Working-hour losses represent the percentage of hours lost compared to the fourth quarter of 2019, seasonally adjusted. See ILO (2021b) for the estimation methodology.

**Source:** ILO estimates, ILOSTAT Database.

have seen working-hour losses of 6.1 per cent and 6.2 per cent, respectively, relative to the fourth quarter of 2019. This is a deterioration relative to the working-hour losses of 5.7 per cent in the fourth quarter of 2020, driven by a new wave of the pandemic, affecting nearly all countries in the region, which caused working-hour losses to be higher than elsewhere.<sup>3</sup> The labour market situation is likely to deteriorate further, as the pandemic continues to spread exponentially in large parts of the region.

This brief develops three scenarios, with different trajectories based on the impact of the pandemic on the movement of people, vaccination progress and speed of economic recovery.<sup>4</sup> In none of the scenarios are working hours expected to fully recover by 2022 (figure 4). In 2021, the ASEAN region is expected to see losses in working hours of 7.4 per cent in the baseline scenario and 7.0 per cent and 7.9 per cent in the optimistic and pessimistic scenarios, respectively. Given the rapidly evolving situation, these projections are subject to a high level of uncertainty.

► **Figure 4. Projected trends in working hours in the ASEAN region (difference from fourth quarter of 2019, %)**



**Notes:** Trends in working hours are shown as the percentage deviation of total hours worked as projected under three scenarios, from total hours worked in the fourth quarter of 2019, seasonally adjusted.

**Source:** ILO estimates and projections.

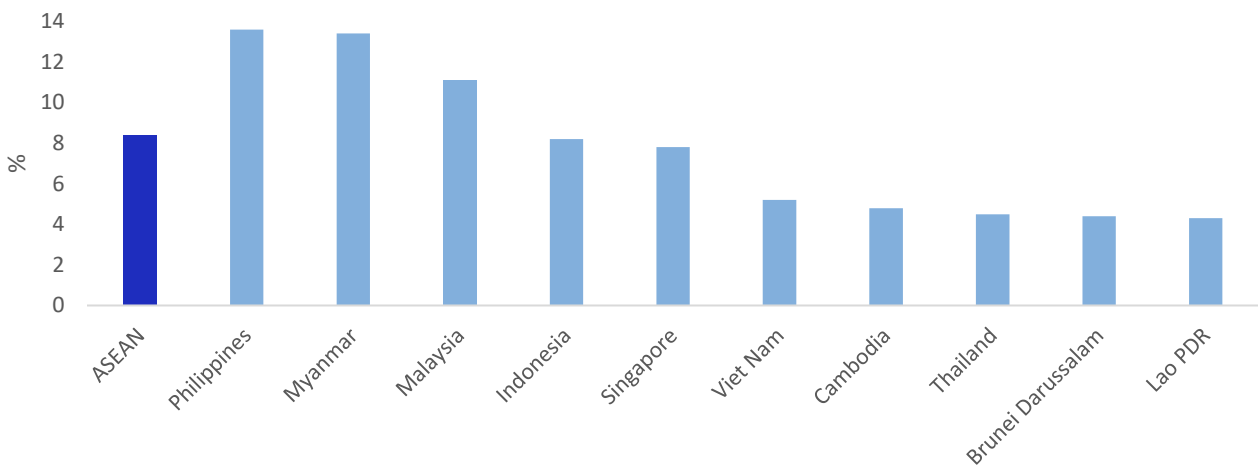
<sup>3</sup> While overall working hours in the ASEAN region declined as a result of the pandemic, healthcare and other essential workers are likely to have experienced increased workloads, leading to longer working hours and reduced rest periods (ILO 2021c).

<sup>4</sup> Working-hour loss projections for the second half of 2021 were estimated on the basis of the decline in retail and workplace mobility observed in July 2021 and assumptions on the further course of the pandemic. Working-hour loss projections for 2022 rely on an earlier scenario analysis, published in ILO (2021d).

While all countries in the ASEAN region have seen their working hours drop significantly, the magnitude of the impact has varied between countries. In 2020, the Philippines saw the largest working-hour losses, reaching 13.6 per cent. In contrast, working hours in countries like Thailand, Brunei Darussalam and Lao People’s Democratic Republic dropped by only 4.3-4.5 per cent (figure 5). These differences are driven by several factors, including the ability to control the pandemic, as well as the stringency and duration of lockdown measures implemented to curb

the spread of the pandemic. Moreover, the economic structure of a country plays a role, as some sectors such as agriculture have been less vulnerable to the pandemic compared to others such as tourism-related industries (ILO 2021b). Some countries have been more affected compared to others due to their participation in global supply chains (see Box 1). Also countries’ capacity to provide fiscal stimulus to their economies and to keep workers in employment have differed vastly (see section below on policy responses).

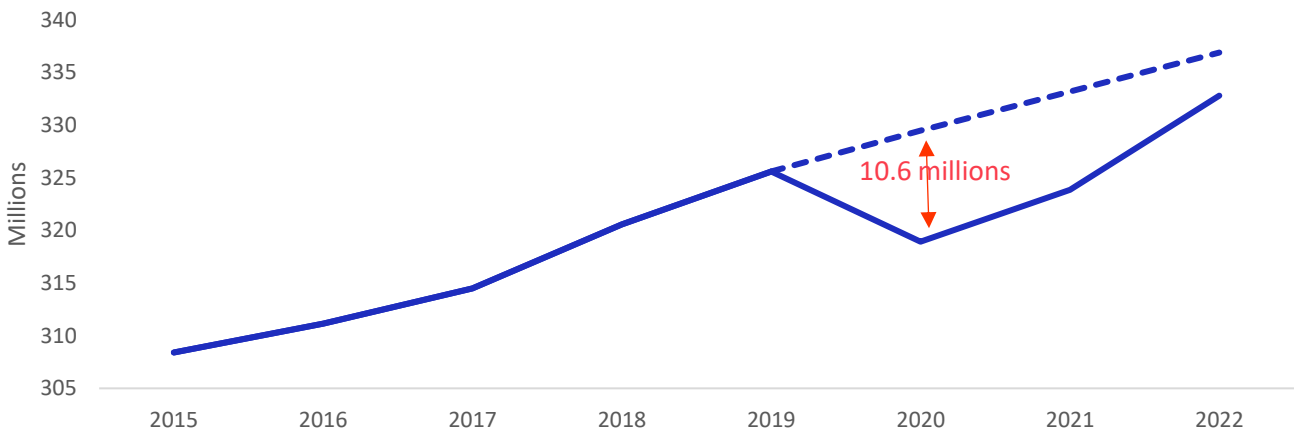
► **Figure 5. Decrease in working hours due to the pandemic in ASEAN and Member States, 2020 (%)**



**Notes:** See notes for Figure 2.

**Source:** ILO estimates, ILOSTAT Database.

► **Figure 6. Employment in the ASEAN region, comparison with no-pandemic scenario (millions)**



**Notes:** The dashed line shows employment as expected in a no-pandemic scenario.

**Source:** ILO estimates and projections based on ILO (2021d).

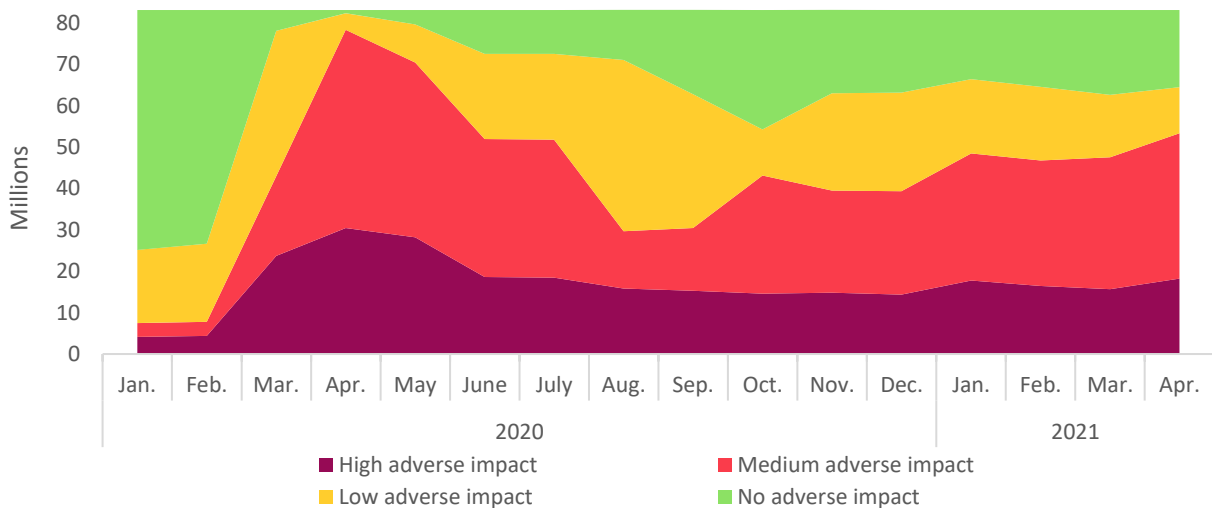
**Box 1**

**COVID-19 and consumer demand: How jobs in ASEAN are affected through global supply chains**

The COVID-19 pandemic led to a severe decline in consumer demand in most countries of the world, with some recovery in 2021 only seen in some regions such as North America (ILO 2021e). With global production interlinked through global supply chains, the effects on economies have reached beyond national borders, also affecting the ASEAN region. Millions of enterprises and jobs in the ASEAN region contribute to the production of manufacturing goods, consumed within ASEAN and worldwide. As consumer demand is down, also jobs in global supply chains for manufacturing, located in the ASEAN region, suffer from adverse impacts.

Overall, there are an estimated 83 million jobs in global supply chains for manufacturing in the eight ASEAN countries for which estimates are available – approximately 28 per cent of total employment. In April 2021, an estimated 18 million of these jobs endured a high adverse impact. A further 35 million witnessed a medium adverse impact due to a drop in consumer demand for manufacturing products (figure B1). Many of these jobs are likely to either have been completely lost or have suffered substantially from reduced working hours, income losses or other downward pressures on labour standards and working conditions.

► **Figure B1. Number of jobs in global supply chains for manufacturing, ASEAN, by impact (millions)**



**Notes:** The estimates shown include data for eight ASEAN countries, only excluding Myanmar and Lao People’s Democratic Republic due to lack of data. The classification of jobs in global supply chains for manufacturing is based on whether these jobs are linked to consumer demand that experiences a high, medium, low or no adverse impact due to COVID-19. It was developed on the basis of data on retail sales growth and working-hour losses at the country and sector level. For more detailed information, see ILO (2021e).

**Source:** ILO estimates based on the methodology described in ILO (2021e).

**The pandemic opened up an unprecedented jobs gap**

While employment in the ASEAN region had been on a steady upward trajectory before the pandemic, largely driven by demographic trends, the COVID-19 pandemic

caused a major dent in this trend (figure 6). In 2020, there were 10.6 million (or 3.2 per cent) fewer workers in employment than expected for 2020 in a no-pandemic scenario. Employment losses have affected both formal and informal workers.<sup>5</sup> In 2021 and 2022, the employment gap relative to the no-pandemic scenario is projected to

<sup>5</sup> For example, more than 60 per cent of the overall employment loss in Viet Nam between the first and the second quarter of 2020 was accounted for by informal workers (ILO 2020a). Many workers that originally were in formal employment moved into informal employment, experiencing a deterioration in working conditions, which is not reflected in the employment loss estimates (ILO 2020b).

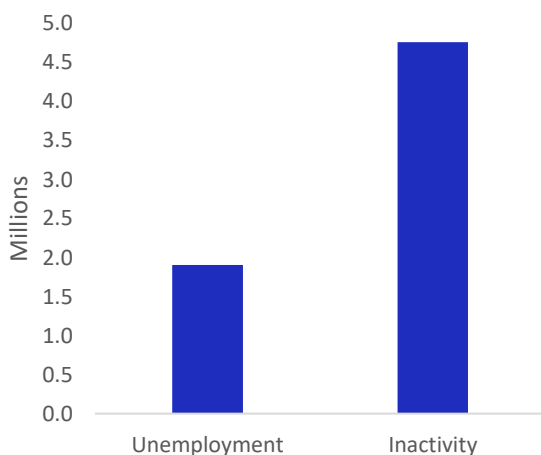
respectively remain at 9.3 million and 4.1 million jobs in the ASEAN region.

Not only when compared to a no-pandemic scenario, but also based on the year-on-year comparison to 2019, employment in 2020 declined by a staggering 6.7 million. The impact of the pandemic on employment is unprecedented. Even during previous economic crises such as the Asian financial crisis in 1997 or the Great Recession in 2008-9, employment had always been on the rise in the ASEAN region.

### Unemployment and inactivity increased substantially

Most of the 6.7 million workers that left employment in 2020 went into economic inactivity, which increased by 4.8 million compared to 2019 (figure 7). Some of those workers might have either been discouraged to search for a new job, and others – in many cases women – might have been forced to give up employment because of unpaid care responsibilities as schools closed. Another 1.9 million workers became unemployed and were hence available for work and actively looking for a job. As a result, the unemployment rate in the ASEAN region

► **Figure 7. Increase in unemployment and inactivity in the ASEAN region, 2019-20 (millions)**



**Notes:** Inactivity refers to the working-age population that is neither in employment nor unemployment.

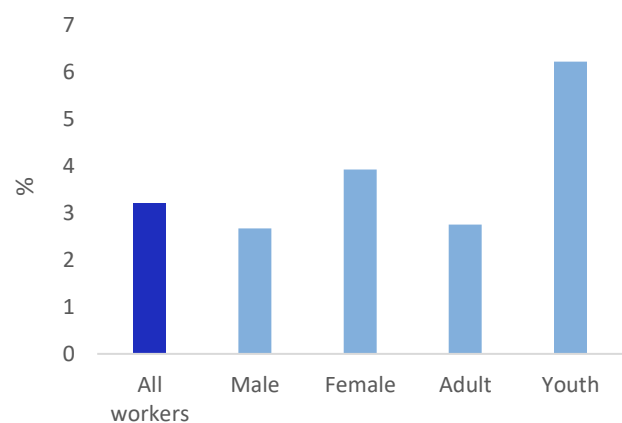
**Source:** ILO estimates, ILOSTAT Database.

increased from 2.5 per cent in 2019 to 3.1 per cent in 2020.

### Job losses have impacted women and young workers disproportionately

The pandemic has not affected all workers to the same extent. For example, women workers had a higher likelihood of losing employment than their male counterparts, globally as well as in the ASEAN region. More specifically, female employment in the ASEAN region in 2020 was 3.9 per cent lower than the expected level in the absence of the crisis (figure 8). This compares to 2.7 per cent for men. Likewise, young workers have been particularly hard hit by the pandemic. Youth employment losses were 6.2 per cent, compared with 2.8 per cent for adults, with many young workers moving into either unemployment or inactivity. The share of youth not in employment, education or training (NEET) increased between 2019 and 2020 in large parts of the ASEAN region, including in Indonesia, Singapore, Thailand and Viet Nam, in line with global trends (ILO 2021e).<sup>6</sup>

► **Figure 8. Employment losses in the ASEAN region due to the pandemic for different groups of workers, 2020 (%)**



**Notes:** Employment losses are expressed as a percentage difference between the projected employment, assuming that there had been no pandemic, and actual employment.

**Source:** ILO estimates developed for ILO (2021d).

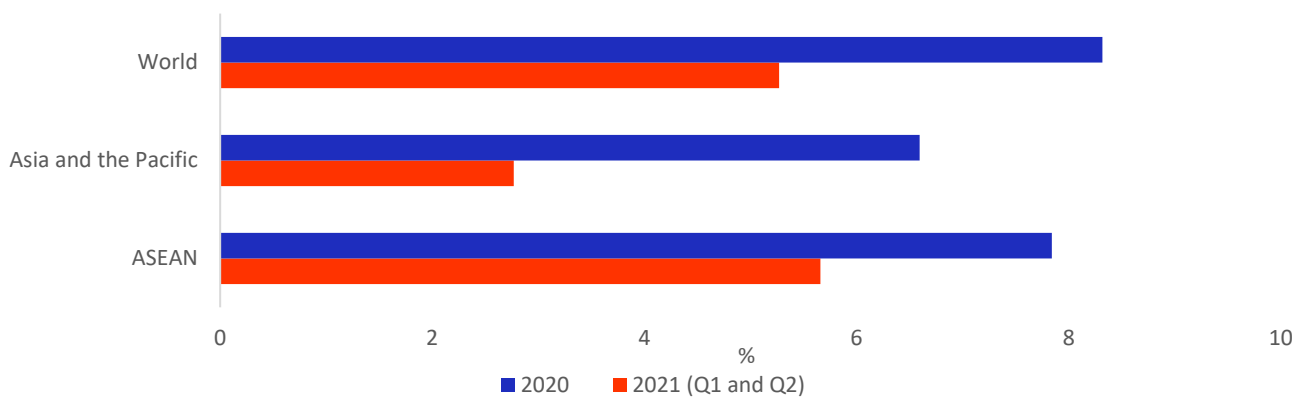
<sup>6</sup> Source: ILOSTAT database, based on national Labour Force Surveys, accessed on 21 July 2021.

## Workers continue to endure heavy labour income losses

Working-hour losses and job losses have caused millions of workers to lose their labour income or parts of it, increasing substantially their risk of falling into poverty.<sup>7</sup> In the ASEAN region, 7.8 per cent of labour income was lost in 2020, which corresponds to US\$ 100 billion (using 2019 market exchange rates) or 3.3 per cent of the region's gross domestic product (GDP) in 2019 (figure 9). This drop was slightly smaller than global income losses,

but higher than regional Asia-Pacific income losses. Also in the first half of 2021, labour income losses in the ASEAN region were substantial, with labour income contracting by 5.7 per cent compared to before the crisis. These labour income losses were more pronounced than both the global and wider regional Asia-Pacific decreases. Often, the crisis disproportionately affected low-paid workers, thereby increasing wage and income inequalities (ILO 2021b).

► **Figure 9. Percentage of labour income lost due to working-hour losses, 2020 and first half of 2021 (%)**



**Notes:** Labour incomes have been aggregated using purchasing power parity exchange rates. Any income support measures (such as transfers and benefits) have not been taken into account. Losses are relative to 2019.

**Source:** ILO estimates developed for ILO (2021d).

## ► What has been the ASEAN policy response to the crisis?

### ASEAN has defined several regional priorities for action

Tackling these sizeable labour market disruptions is critical to facilitating a robust and inclusive socioeconomic recovery in the coming years. To this end, a collective and united ASEAN response, strengthened through regional cooperation, is important to overcome the unprecedented challenges presented by the COVID-19 crisis. The roadmaps for addressing many of these issues are reflected in official ASEAN policy statements and frameworks (see table 1).

The *ASEAN Comprehensive Recovery Framework (ACRF)*, adopted at the 37th ASEAN Summit on 12 November 2020, lays out a clear implementation plan that “serves as the consolidated exit strategy from the COVID-19 crisis” (ASEAN 2020b, 4). Under five broad strategies, the ACRF emphasizes a number of measures related to promoting decent work in the recovery process. These include expanding social protection including for informal workers (strategy 2a) and upgrading skills and human capital development (strategy 2c). Moreover, the ACRF highlights the need for preparing labour policies through social dialogue (strategy 2d), protecting employment in impacted sectors such as tourism and in micro, small and

<sup>7</sup> Increased poverty threatens to further erode global progress against child labour, also in parts of the ASEAN region (ILO and UNICEF 2021).

medium enterprises (MSMEs) (strategy 3g), and boosting rural agricultural productivity (strategy 5e).

The ACRF is in-line with the [Joint Statement of ASEAN Labour Ministers on Response to the Impact of Coronavirus Disease 2019 \(Covid-19\) on Labour and Employment](#), adopted in May 2020 (ASEAN 2020c). The Statement first calls for “support for the livelihood and health of all workers... and safeguard labour rights amidst the impact of COVID-19” (action no. 1). It emphasizes the importance of supporting affected migrant workers in the ASEAN region, “including effective implementation of the ASEAN Consensus on the Protection and Promotion of the

Rights of Migrant Workers” (action no. 4). Moreover, it underlines the necessity to strengthen “the effectiveness of active labour market policies at national and regional levels, occupational safety and health standards, and social protection systems through productive and harmonious social dialogue” (action no. 5). Critically, the Statement also highlights the importance of greater cooperation, including with international organizations, “in mutually agreed areas such as knowledge sharing, research and development technical assistance and resource mobilisation to support rapid responses and post-pandemic recovery plan” (action no. 8).

► **Table 1. Selected ASEAN policy priority areas related to decent work in response to COVID-19**

ASEAN Comprehensive Recovery Framework (November 2020)	Joint Statement of ASEAN Labour Ministers on Response to the Impact Of Coronavirus Disease 2019 (Covid-19) On Labour And Employment (May 2020)
<ul style="list-style-type: none"> <li>• Agricultural productivity</li> <li>• Informal and gig employment</li> <li>• Labour migration</li> <li>• MSME support</li> <li>• Occupational safety and health</li> <li>• Skills development</li> <li>• Social dialogue</li> <li>• Social protection</li> </ul>	<ul style="list-style-type: none"> <li>• Labour rights</li> <li>• Labour migration</li> <li>• Occupational safety and health</li> <li>• Social dialogue</li> <li>• Social protection</li> </ul>

Source: ILO compilation.

## National policy responses in ASEAN are unprecedented

Facing varied national circumstances, ASEAN Member States have responded to the COVID-19 crisis through a range of fiscal support measures aimed at maintaining household income and consumption, protecting jobs, and supporting business sustainability through emergency financing. The ASEAN region collectively had allocated nearly 16 per cent of GDP on the fiscal stimulus response as of the end of May 2021 (figure 10). The range in the magnitude of the fiscal policy response in each country has been wide, however, partially reflecting public budgetary constraints. For example, at the upper tier, Malaysia and Singapore had invested around 30 per cent of their respective GDP to counter the COVID-19 crisis. Conversely, both Myanmar and the Lao People’s Democratic Republic had announced fiscal stimulus

packages of less than 1 per cent of GDP. The wide divergence in fiscal support suggests the need for heightened intra-ASEAN cooperation and solidarity to foster a robust recovery across the entire region.

Policymakers in all ten ASEAN Member States have leveraged social protection as one of the important instruments during the crisis to sustain household consumption and counter the economic slowdown (figure 11). In total, the region had announced 133 social protection measures in response to the COVID-19 pandemic as of mid-May 2021. Of the various types of social protection measures, special allowances and grants (for example, cash transfers to low-income households) accounted for the largest portion (20.3 per cent) followed by income and jobs protection (15.8 per cent).

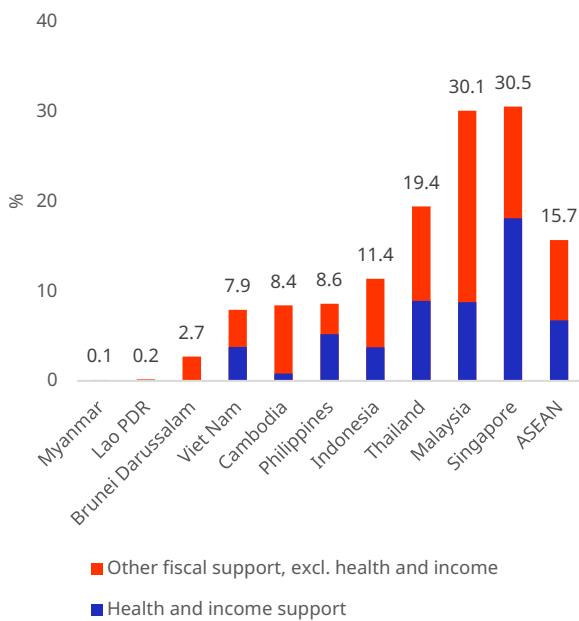
The latter type of schemes includes temporary wage subsidy programmes introduced during the crisis to effectively retain jobs, sustain the essential employer-



employee relationship and boost consumption demand. Sizeable investments were made in the COVID-19 job and income protection policies in some countries. In Malaysia, Thailand and Singapore, for example, the temporary schemes amounted to 1.1 per cent, 2.3 per cent and 4.6 per cent of GDP, respectively (ILO 2021g). The employment support schemes in many ASEAN countries

were used to assist the most vulnerable and hard hit segments of the labour market. These included support for MSMEs in Brunei Darussalam and the Philippines, garment manufacturing and tourism in Cambodia, which predominantly employ women, and low-paid workers in Indonesia, Malaysia and Thailand.

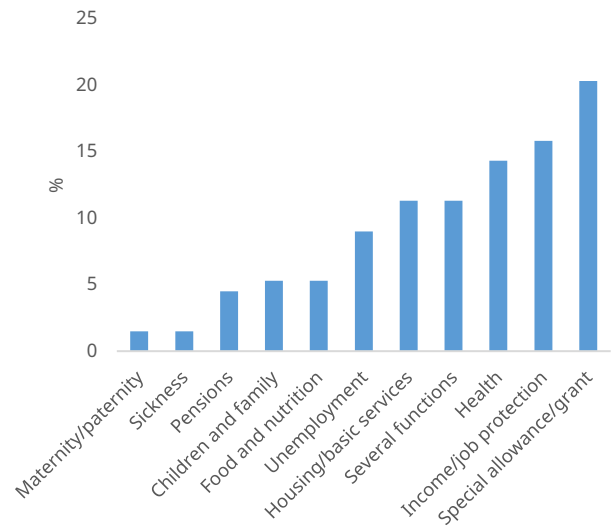
► **Figure 10. Fiscal stimulus package by type of measure (% of GDP)**



**Notes:** Data as of 31 May 2021 presented as a percentage of GDP in 2019. Other fiscal support includes liquidity support, credit creation, direct long-term lending, and equity support.

**Source:** ILO compilation based on ADB, ADB COVID-19 Policy Database.

► **Figure 11. Social protection measures in response to COVID-19 in ASEAN, by type of measure (% distribution)**



**Notes:** Data as of 10 May 2021. N=133.

**Source:** ILO, Social Protection Responses to COVID-19 Crisis Database.

## ► Moving forward

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The COVID-19 pandemic has had devastating consequences on employers and workers in the ASEAN region. In 2020, 8.4 per cent of working hours, 10.6 million jobs, and 7.8 per cent of labour income were lost. Also in 2021, the labour markets of ASEAN countries continue to be severely impacted. The crisis has laid bare the vulnerabilities of the economies and labour markets in the region, which need to be tackled in order to build back better from the crisis and ensure a decent future of work in the ASEAN region.

At the International Labour Conference in June 2021, the ILO member States, including representatives from all ten ASEAN countries, adopted the [Global Call to Action for a Human-centred Recovery from the COVID-19 Crisis that is Inclusive, Sustainable and Resilient](#) (ILO 2021a). The Global Call to Action provides a robust framework to support ASEAN Member States to meet the commitments laid out in the ACRF. Underpinned by the principles of inclusive economic growth and employment, protection of all workers, universal social protection and social dialogue, the Global Call to Action highlights priorities that ASEAN can consider in the design and implementation of recovery strategies that leave no one behind:

1. Support the viability of enterprises, particularly MSMEs, and foster local content and the resilience of supply chains that contribute to decent jobs and environmental sustainability;
2. Invest in skills development, lifelong learning and other active labour market policies, including more equitable and effective access to demand-driven training, to facilitate successful labour market transitions and close gender skills gaps;

3. Promote integrated and gender-responsive approaches to accelerate the transition to the formal economy, with due attention to the rural economy, to create decent jobs and expand social protection;
4. Provide all workers, including migrant workers regardless of their migration and work status, with adequate protections through reinforcing respect for international labour standards, ensuring an adequate minimum wage and safeguarding safety and health at work;<sup>8</sup>
5. Implement a transformative agenda for gender equality by ensuring equal pay, supporting unpaid care work, formalizing domestic work and preventing and addressing violence and harassment in the world of work, including gender-based violence; and
6. Promote social dialogue and tripartism to catalyze improved working conditions and wage-setting mechanisms, and enhance the delivery of the outcomes of ACRF.

Given the uneven crisis impact across the ASEAN region and varied national capacity in the policy responses thus far, enhanced international solidarity and regional cooperation are critical to driving an inclusive, human-centred recovery. Such efforts would help strengthen the support across the region for the most vulnerable and hardest hit by the crisis, including women, youth, migrant workers and MSMEs, among others, and place decent work at the core of recovery strategies to rebuild better from the crisis.

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<sup>8</sup> Several ASEAN Member States have experienced COVID-19 clusters in accommodations for migrant workers. Safeguarding the safety and health at work will also require the establishment and strengthening of national standards for workers' accommodations, including those of migrant workers (ADB, OECD and ILO 2021; ILO forthcoming).

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