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A graphic of a bar chart with 12 green bars of varying heights. The chart is overlaid on the text "MIND THE GAP". The bars are positioned between horizontal lines that pass through the letters. The bars have a slight 3D effect with a gradient from dark green to light green. The chart is flanked by two vertical lines with yellow dots at the top and bottom, suggesting a coordinate system or data range.

Mapping Youth Skills for the Future in ASEAN

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Abbreviations

4IR	Fourth Industrial Revolution
ACRF	ASEAN Comprehensive Recovery Framework
ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
BPS	Indonesian National Bureau of Statistics/ Badan Pusat Statistik (BPS)
CAP	Career Advancing Programme
GEDSI	Gender Equality, Disability, and Social Inclusion
FGD	Focus Group Discussion
ILO	International Labour Organization
KPI	Key Performance Indicators
ICT	Information, communication, and technology
IT	Information and technology
KII	Key-Informant Interviews
MCO	Movement control order
MOHE	Ministry of Higher Education
MSMEs	Micro, small, and medium-sized enterprises
MYR	Malaysia Ringgit
NEET	Youth not in employment, education or training
NGO	Non-governmental organization
PWD	Persons with disabilities
STEM	Science, technology, engineering, and math
TVET	Technical and vocational education and training
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNICEF	United Nations International Children's Emergency Fund
UI	User interface
UNFPA	United Nations Population Fund
UX	User experience
WEF	World Economic Forum
WFH	Work-from-home
YDI	ASEAN Youth Development Index

Executive Summary

The youth has become a key pillar of policy action worldwide. For instance, the UNESCO's 2030 Agenda for Sustainable Development identifies 20 youth-specific targets on global issues such as hunger, education, gender equality, decent work, inequality, and climate change.¹ The sizeable share of young people, estimated to grow to 303 million² in Eastern and Southeastern Asia, highlights their essential role in achieving growth in the region. However, young workers in ASEAN have been disproportionately affected by the pandemic, accounting for 6.2 per cent of job losses compared to only 2.8 per cent among adults.³ This trend is expected to further place underserved youth such as women and people with disabilities (PWDs) at a disadvantage.

By using a mixed-methods approach with a particular focus on underserved youth, this study aims to investigate the employment landscape for young people in ASEAN, particularly concerning skills demand and learning behaviour⁴ trends post-pandemic. The report presents the views of 1,642 survey respondents and 502 focus group and interview participants from 10 ASEAN nations with the goal of providing a basis for countries to address the potential skills gap and enhance the labour market opportunities for underserved youth in the region.

This Executive Summary outlines the main findings on the employment trends in ASEAN post-pandemic, the skills demand and supply among youth, patterns of learning behaviour and barriers to access, and the underserved young people's aspirations for future careers.

The pandemic disproportionately affected specific sectors that employ young people in ASEAN, further exacerbating unemployment and job uncertainty among underserved youth.

The rate of unemployment also hit double-digits at the height of the pandemic. In countries like Indonesia, the Philippines, Thailand, and Viet Nam, 45 per cent of COVID-19 job losses in 2020 affected young workers.⁵ This spike in unemployment is partly attributed to the fact that the hardest-hit sectors – such as wholesale and retail trade, repair, manufacturing, rental and business services, and accommodation and food services – comprise more than 100 million young workers, a high proportion of which are young women.⁶ High

¹ UNDP. (2017). *Fast facts: Youth as partners for the implementation of the SDGs*, in https://www.undp.org/content/dam/undp/library/Democratic%20Governance/Youth/Fast%20Facts%20-%20Youth%20&%20SDGs_2017-January_final.pdf

² UNDESA. (2018). *Chapter 2: Youth development and participation*, in <https://www.un.org/development/desa/youth/wp-content/uploads/sites/21/2020/10/WYR2020-Chapter2.pdf>

³ ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/briefingnote/wcms_816432.pdf

⁴ Learning behavior is a broad term that refers to the forms of skills training that young people participate in as well as the barriers to accessing these learning opportunities.

⁵ ADB. (2021). *COVID-19 and labour markets in Southeast Asia: Impacts on Indonesia, Malaysia, the Philippines, Thailand, and Viet Nam*, in <https://www.adb.org/sites/default/files/publication/758611/covid-19-labor-markets-south-east-asia.pdf>

⁶ ILO. (2021). *COVID-19 and the ASEAN labour market*.

informality across the region through employment in micro, small, and medium enterprises (MSMEs) has also negatively affected the youth, primarily since 43 million are employed in the informal sector.⁷ Additionally, the study's findings reveal that jobs have been increasingly challenging to fill in countries such as Cambodia and Myanmar due to a lack of science, technology, engineering, and maths (STEM) graduates. With more than one-third of the ASEAN population being youth⁸, rampant unemployment among them is likely to bring a scarring⁹ effect on the ground, albeit less likely compared to other subregions.

The demand for digital skills is on the rise, yet soft skills have become even more valuable.

As pointed out in LinkedIn's 2020 Emerging Jobs Report, digital and soft skills have become even more valuable in an era of automation and rapid digitalisation.¹⁰ This trend coincides with the study's findings that soft skills such as self-leadership and interpersonal skills have helped more than two-thirds of underserved young workers secure jobs. More than half of the youth surveyed also report that cognitive skills have been equally important in them being hired. However, only less than half of the respondents perceive digital skills as instrumental in finding employment, which may be due to the underserved youth's underrepresentation in digital and high-value job sectors as well as the failure of certain industries to modernise and adapt to the changing times. As digitalisation will be a defining feature of the future job market, systematic intervention through regulation and industry support needs to be tailored for the youth, especially for traditionally underserved groups.

ASEAN youth have mainly developed their skills through formal education, while non-formal opportunities to access reskilling and upskilling are limited by gaps in available information and resources.

Young people in ASEAN primarily acquire their skills through school-based education, while less than 50 per cent have attended training outside the formal setting. In 70 per cent of the cases, such training programmes are delivered by private institutions. ASEAN youth's top challenges to accessing training opportunities include limited information, budget and time constraints, and distance barriers. Young people in Myanmar are particularly affected by a lack of information, where half of the respondents were unaware of available training opportunities.

Young women have been disproportionately affected by the pandemic due to the care burden and high levels of informal work, preventing them from securing jobs and attending training.

In almost all ASEAN countries, young women have been negatively affected by the pandemic as the care burden intensified with work-from-home arrangements. The lack of social protection in informal work has also made women more vulnerable, especially in Myanmar and the Philippines, where most women workers are employed in informal sectors such as agriculture and services. In addition, female tertiary level enrolment rates for women remain lower than the rate of secondary education completion, further limiting their career progression opportunities.

⁷ ILO. (2020). *Tackling the COVID-19 youth employment crisis in Asia and the Pacific*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_753369.pdf

⁸ ASEAN Secretariat. (2021). *ASEAN Youth Development Index*, in https://asean.org/wpcontent/uploads/2017/10/ASEAN-UNFPA_report_web-final-05sep.pdf

⁹ A 'scarring effect' refers to the long-term drawbacks derived from high youth unemployment. It exacerbates the situation where young people earn less, lose their potential, and increase their difficulty to secure jobs. This phenomenon negatively affects the country's economy, especially in countries with a young demographic.

¹⁰ LinkedIn. (2019). *The Jobs of Tomorrow: LinkedIn's 2020 Emerging Jobs Report*, in <https://blog.linkedin.com/2019/december/10/the-jobs-of-tomorrow-linkedins-2020-emerging-jobs-report>

In terms of accessing training, a sizeable proportion of young women in Brunei Darussalam (44 per cent), Cambodia (28.6 per cent), Malaysia (17.8 per cent), Myanmar (51.9 per cent), the Philippines (40 per cent), and Thailand (32.1 per cent) reported lack of information as an important challenge. Disproportionate caring duties, high levels of informal work, and lack of family assistance and financial support have also reduced women's interest and opportunity to attend training.

Young people with disabilities (PWDs) continue to face discrimination in the labour market.

Young PWDs are more vulnerable to discriminatory practices when accessing employment. There is a tendency in almost all the ASEAN countries for employers to view disability as a hindrance to performance. Certain types of disability also continue to be stigmatised in the workplace. To tackle this problem, countries like Malaysia, Thailand, and Singapore have enacted legal provisions such as quotas and incentives to more carefully match jobseekers' skills with suitable jobs, thereby enabling young PWDs to find employment.

The main barriers to accessing training for PWDs are limited information, lack of devices, lack of parental consent, and lack of disability-friendly access. Some of these challenges are particularly notable in countries like Cambodia, where more than 70 per cent of the respondents lacked training-related information and more than 45 per cent had no access to proper devices. Meanwhile, a lack of disability-friendly training was identified as one of Singapore's top main concerns for young PWDs.

Underserved young people in ASEAN acknowledged the importance of digital skills to support their entrepreneurial aspirations.

The survey revealed that more than 60 per cent of the respondents intend to upskill or reskill basic digital skills, which corresponds with their aspiration to work as entrepreneurs. In keeping with the region's shift towards digital transformation, digital skills uptake through training will equip the youth with resources to build their businesses in the future.

Moving forward, training and employment should be inclusive, target-based, gender-responsive, and future-oriented.

The study's findings highlight the need to address the potential skills mismatch by designing inclusive, target-based, gender-responsive, and future-oriented training. Training programmes should be rooted in the community and be backed by the public sector to ensure their affordability. Inviting communities to participate may also attract more underserved young people to engage and increase the availability of training to address distance barriers. Training should also be target-based, given the diverse learning requirements of underserved youth. Meanwhile, young women workers will benefit from government- and employer-led incentives to promote flexibility and social protection. Lastly, training courses should consider the future needs of young people by conducting incremental and participatory research to inform their design and delivery.

01

Introductory Chapter

Methodology

Introduction | Methodology |
Concepts | Research Process

Introduction

Background

Tackling issues around youth has become an essential dimension of policy action around the globe. According to the ASEAN Youth Development Index,¹¹ young people represent a significant share of the ASEAN population at 34 per cent, which is projected to peak in 2038. They are viewed not only as assets for economic prosperity^{12,13} but also as future leaders¹⁴ who will drive the region's political, social, and cultural development.

ASEAN youth's contributions to development rest on their skills and capacity to actively participate in the labour market, yet the employment landscape seems bleak, especially for underserved youth.¹⁵ Compared to adults, youth are more likely to be unemployed across Asia. In 2019, one-third of female youth in South-eastern Asia and the Pacific were not in employment, education, or training (NEET). These statistics are slightly higher than the world average. The youth are also highly engaged in informal work, exposing them to a shrinking job market with limited social protection in light of the pandemic. Around 47 per cent of working youth are employed in sectors most affected by COVID-19, with a disproportionate impact on young women workers.¹⁶

Rationale and Objectives

Considering the pressing challenges being faced by youth in the labour market, it is vital to comprehensively study the landscape of youth employability in the region post-pandemic, examining both the preexisting skills mismatch and the extent to which the pandemic has exacerbated these trends for underserved groups.

With this rationale, the research intends to map out the employment and skills trends for underserved youth across ten countries in Southeast Asia. More specifically, the study aims to examine the employment landscape of youth aged 18 to 29 in ASEAN before and as a result of the pandemic, the most demanded skills in the job market, and the barriers for underserved youth to participate in training that affect their readiness to enter the job market. The following section will discuss the methodology used to achieve these three objectives.

¹¹ ASEAN Secretariat. (2021). *ASEAN Youth Development Index*.

¹² *Ibid.*

¹³ WEF. (2019). *ASEAN youth survey 2019 report*, in https://www3.weforum.org/docs/WEF_ASEAN_Youth_Survey_2019_Report.pdf

¹⁴ Marwan et al. (2017). *Embracing ASEAN community: Malaysia, Indonesia, and Brunei youth perspective*, in https://www.researchgate.net/publication/332039832_EMBRACING_ASEAN_COMMUNITY_MALAYSIA_INDONESIA_AND_BRUNEI_YOUTH_PERSPECTIVE

¹⁵ The definition of underserved youth will be explained in the later section.

¹⁶ ILO and ADB. (2020). *Tackling the COVID-19 youth employment crisis in Asia and the Pacific*, in <https://www.adb.org/publications/covid-19-youth-employment-crisis-asia-pacific>

Concepts

The report draws on three main concepts to inform the study's mixed-methods approach. Existing frameworks on employment and future skills are first presented, which informed the design of the survey and qualitative data collection instruments employed in the study. This is followed by a discussion on the inclusion-specific dimensions considered, including the focus on underserved ASEAN youth and the use of the Gender Equality, Disability, and Social Inclusion (GEDSI) approach.

I. Employment and Future Skills

Employment is a key issue for economic stability and social cohesion around the globe, and several frameworks have been developed to conceptualise and address work-related dimensions. One such approach is the Decent Work Agenda developed by the ILO, which defines employment as 'all persons of working age aged 15 and older – who, during a specified brief period, were in paid employment or self-employment.'¹⁷ This definition includes workers in explicit or implicit employment arrangements allowing them to receive remuneration and self-employed workers who provide certain services and/or goods in exchange for a fee. The ILO Decent Work Agenda underlines that employment should involve 'rights at work, social protection, and social dialogue, with gender equality as a cross-cutting objective.'¹⁸

Another model that has emerged is the European Union's 'flexicurity' approach, which promotes a combination of flexible work arrangements and worker security toward labour market modernisation. Flexicurity involves reliable contracts, quality and efficient education and training systems, effective labour market policies, and sustainable and adequate social protection.¹⁹

Despite the contributions made by the aforementioned approaches to promoting and understanding employment, there is a consensus around the need to define the future of work and design reflective and context-sensitive policies, especially in an era marked by rapid changes. As a response, ILO²⁰ proposed a human-centred framework that conceptualises the future of work around three pillars of action, namely investing in people through skills-building, including reskilling and upskilling; improving workplaces to champion equality, freedom, and economic security; and supporting sustainable work. Meanwhile, the EU²¹ emphasised the role of the platform economy in

¹⁷ ILO. (n.d.) *Employment by status in employment*, in https://www.ilo.org/ilostat-files/Documents/description_STE_EN.pdf

¹⁸ ILO. (2015). *Decent work*, in <https://www.ilo.org/global/topics/decent-work/lang--en/index.htm>

¹⁹ EU (n.d). *Flexicurity*, in <https://ec.europa.eu/social/main.jsp?langId=en&catId=102>

²⁰ ILO. (2019) . *Work for a brighter future*, in https://www.ilo.org/wcmsp5/groups/public/---dgreports/---cabinet/ documents/ publication/ wcms_662410.pdf

²¹ EU. (2021). *The future of work: trends, challenges, and potential initiatives*, in [https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/679097/EPRS_BRI\(2021\)679097_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/679097/EPRS_BRI(2021)679097_EN.pdf)

the future of work, which will be characterised by a highly dynamic labour market sensitive to changing user demands and a heightened concern around working conditions.

The three frameworks described above allude to the importance of having fair and just treatment in the labour market, fostering sustainable workplaces, and keeping pace with digital transformation. Taking these dimensions into account, and by combining McKinsey's Framework of Skills²² and WEF's Future of Skills,²³ the report utilises an integrated approach to map out the current and forward-looking employment and skills landscape for the underserved youth in ASEAN. The framework encapsulates four core skill groups, namely cognitive, interpersonal, self-leadership, and digital skills (Fig. 1.1).

1. Cognitive skills comprise critical thinking, project management, creativity, and technical knowledge.
2. Interpersonal skills emphasise developing relationships, communication, teamwork, and mentoring.
3. Self-leadership skills refer to self-awareness and self-management, entrepreneurship, and trustworthiness.
4. Digital skills are divided into two sub-categories: basic digital skills (such as computer literacy, using Microsoft Office, cloud computing, video conferencing, and digital design) and advanced digital skills (including web development, programming, and data analysis).



Cognitive Skills



Interpersonal Skills



Self-leadership Skills



Digital Skills

Figure 1.1. The Framework of Future Skills

Source: Synthesised by LOKA Group with reference from ILO, McKinsey and WEF

Using this framework, the report maps the skills demand and supply around these four domains and identifies the barriers to acquiring them. The goal is to assess whether underserved youth can meet job demands and provide the basis for future research on whether these skills (e.g., interpersonal and self-leadership skills) can create sustainable employment. For a complete list of these skills and their definitions, see Annex C.

²² McKinsey. (2021). *Defining the skills citizens will need in the future world of work*, in <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/defining-the-skills-citizens-will-need-in-the-future-world-of-work>

²³ WEF. (2020). *Future of jobs*, in https://www3.weforum.org/docs/WEF_Future_of_Jobs_2020.pdf

II. Underserved Youth in ASEAN

The COVID-19 pandemic has disproportionately affected the youth.²⁴ According to the ILO, the number of employed young people in Southeast Asia and the Pacific dropped from 49.5 million in 2019 to 46.1 million in 2020.²⁵ The issue of unemployment during the pandemic was driven by several factors, including lower severance pay, limited jobs following a reduction in consumer demand, and the disruption of youth education and/or training that barred them from obtaining the necessary qualifications to apply for jobs.²⁶ Meanwhile, certain collectives have been more vulnerable than others, especially along the intersection of socioeconomic, gender, disability, and minority status. Exploring these forms of disadvantage is one of the main goals of this report.

Overall, underserved youth can be defined as groups of young people who are marginalised as a result of systematic and prolonged inequities and inequalities.²⁷ More specifically, they refer to those who:

1. earn below the national poverty line;
2. are not in employment, education, or training (NEET);
3. hold disability status; or
4. come from minority groups.

III. Gender Equality, Disability, and Social Inclusion (GEDSI)

The GEDSI framework has been widely used in development initiatives worldwide. It is an approach to action that specifically consider:

1. the capacities and constraints faced by women, the poor, PWDs, the vulnerable, and the excluded communities to accessing services;
2. the impact of gender, income, ethnicity, religion, location, ability, and social identifiers on access to services; and
3. human-rights based strategies to promote access for target vulnerable groups.²⁸

The study employs the GEDSI approach by identifying country-specific trends for women and other vulnerable groups concerning their access to the following domains: formal and informal education, training, and employment.

²⁴ ILO. (2021). *An update on the youth labour market impact of the COVID-19 crisis*, in https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/briefingnote/wcms_795479.pdf

²⁵ ILO. (2021). *World employment and social outlook: Trends 2021*, in https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_795453.pdf

²⁶ ILO and ADB. (2020). *Tackling the COVID-19 youth employment crisis in the Asia and Pacific*.

²⁷ American Youth Policy Forum. (n.d). *Youth populations*, in <https://www.aypf.org/youth-populations/>

²⁸ GESI Working Group. (2017). *A common framework for gender equality and social inclusion*, in <https://www2.unwomen.org/-/media/field%20office%20eseasia/docs/publications/2017/04/gesiframeworkreportfinal2017compressed.pdf?la=en&vs=3456>

Methodology

Mixed-Methods Design

The study primarily aims to investigate ASEAN's youth employment and skills landscape. For this, a combination of quantitative and qualitative methods was employed, including mapping the employment trends for ASEAN youth before and as a result of the pandemic, the skills demand and supply in the region, and the skilling needs and barriers experienced by underserved youth. More specifically, the study employs an explanatory sequential design, where patterns derived from quantitative methods are further explored using qualitative approaches.^{29,30}

The following data collection instruments were used:

- 1. Surveys: This tool was used to map out the employment landscape, skills, upskilling/ reskilling potential, and the barriers faced by underserved youth in ASEAN. The findings were also used to design the subsequent stage of qualitative research and to enrich and interpret the descriptive findings.

- 2. Focus group discussions (FGDs): FGDs sought to clarify the participants' perceptions, opinions, feelings, and attitudes towards the findings from the survey.
- 3. Key informant interviews (KII): KIIs were used to complement FGDs by seeking in-depth information from government and industry experts. They also enabled the collection of additional information from relevant groups that the FGDs did not cover.
- 4. Desk research: Secondary sources were used in addition to primary data collection. The reports and publications reviewed were from the WEF, ILO, Asian Development Bank (ADB), World Bank, United Nations Development Programme (UNDP), ASEAN, United Nations (UN), and relevant ministries and agencies at the national level.

An overview of the mixed methods sequence employed is depicted in Fig. 1.2. For a detailed description of the survey items, FGD and KII questions, and fieldwork guidelines, see Annex B.

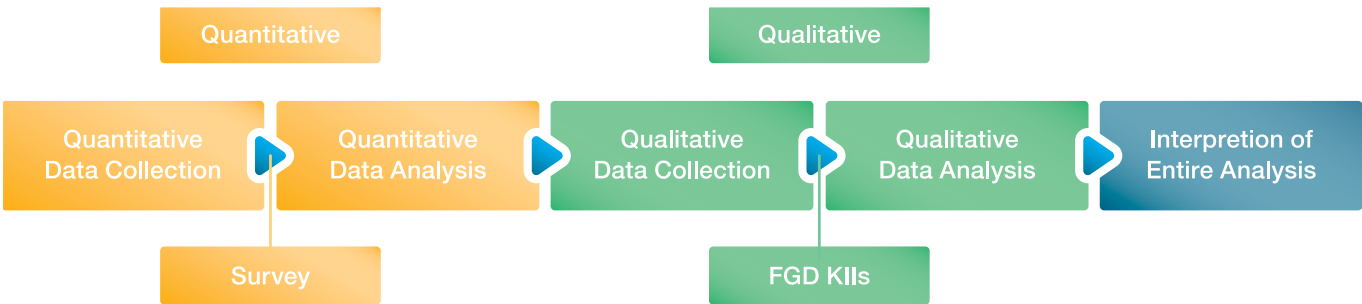


Figure 1.2. Explanatory Sequential Design

Source: Creswell, 2003³¹

²⁹ Wisdom, J. (2013). *Mixed methods: Integrating quantitative and qualitative data collection and analysis while studying patient-centered medical home models*, in <https://pcmh.ahrq.gov/page/mixed-methods-integrating-quantitative-and-qualitative-data-collection-and-analysis-while>

³⁰ Creswell, J. W. (2003). *Research design: qualitative, quantitative, and mixed methods approaches*.

³¹ Creswell, J. W. (2003). *Research design: qualitative, quantitative, and mixed methods approaches*.

Sampling Strategy

1. Quantitative

To ensure a balanced representation of different underserved groups, non-probability sampling was employed to identify potential youth participants in 10 different cities across all 10 ASEAN countries. The study surveyed 1,080 respondents spread proportionately across the survey sites and were stratified based on gender and disability status. The share of young PWDs among the respondents is 16.3 per cent (175 individuals), corresponding with the estimated prevalence of disability in the region (16 per cent). The inclusion criteria for the survey are:

1. be between 18 and 29 years old, and
2. belong to underserved groups (i.e., minority communities, women, disabled, unemployed, or those whose earnings are below the minimum income).

2. Qualitative

A total of 32 FGDs were facilitated by the LOKA Group across 10 different cities in 8 ASEAN countries (excluding Indonesia and Viet Nam). There were a total of 192 FGD participants, who were grouped by gender and disability status. As a complement to FGDs, KIs were also conducted with 40 private sector representatives, 16 informants from governments and public bodies, and 32 representatives from non-governmental organisations (NGOs) and technical and vocational education and training (TVET) institutions.

Meanwhile, separate FGD sessions were conducted in Indonesia and Viet Nam,³² which garnered a total of 128 FGD participants stratified based on gender and disability status. In addition, 24 participated in KIs, proportionately representing private, government, NGO, and TVET institutions. An overview of the study's fieldwork sites and the flow of data processing and report production are outlined in Fig. 1.3.

³² LOKA Group was not responsible and had no direct visibility for the data collection in Indonesia and Vietnam.

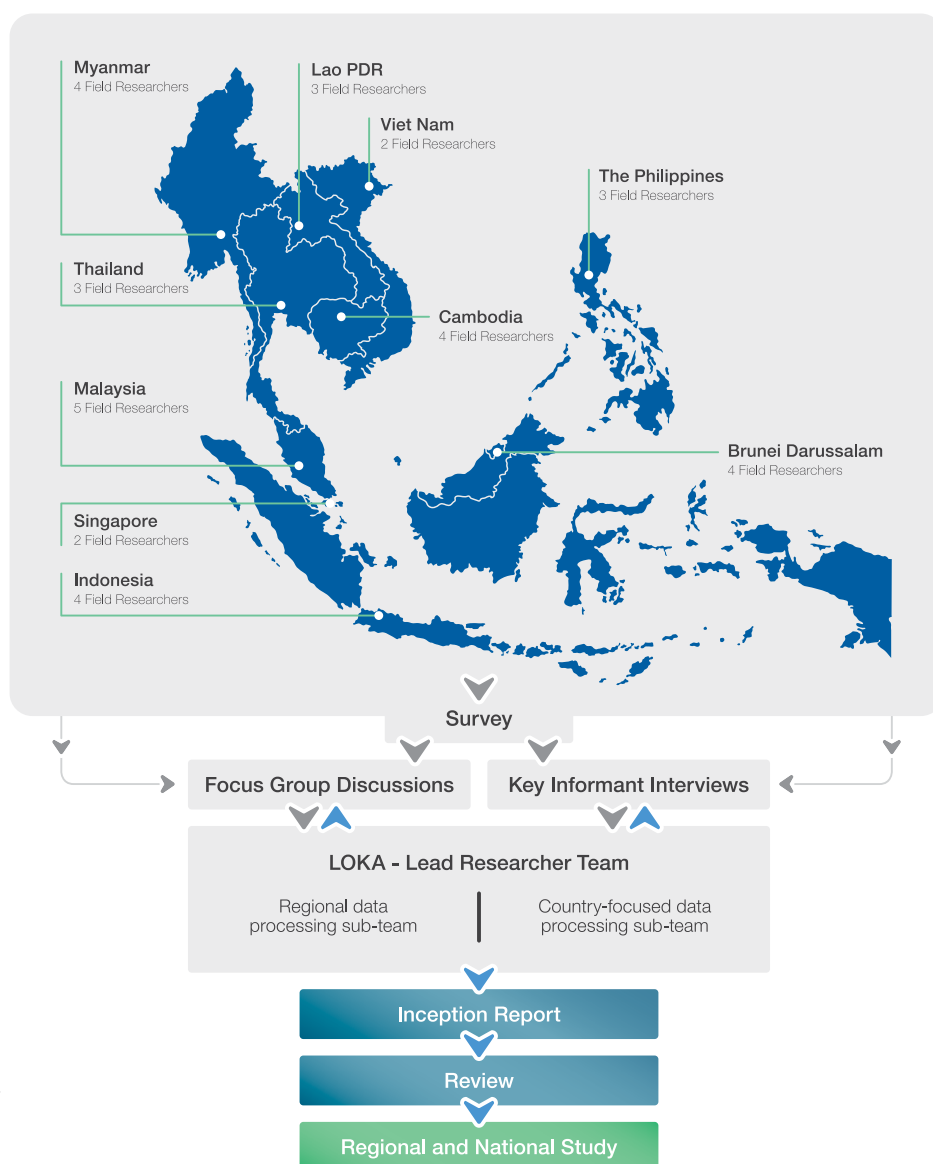


Figure 1.3. Data Processing Flow

Source: LOKA Group

Ethical Considerations

As the study closely engages with underserved youth who are part of at-risk communities, the following ethical issues were considered:

1. The minimum age threshold for participation was set at 18 years, which is the legal age identified by the Convention on the Rights of the Child (CRC).³³ This approach allows the researchers to generate data based on the participants' consent.
2. The participants were informed of potential risks for participation (loss of confidentiality and anonymity, discussions around sensitive topics, etc.) at every stage of data collection. To address this issue, respondents were informed of their right to opt out of the study should they perceive any threat to them or their communities.

³³ UN. (n.d.). *Convention on the rights of the child*, in <https://www.ohchr.org/en/instruments-mechanisms/instruments/convention-rights-child>

02

Region Overview

ASEAN

Overview | Employability Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Profession and Skilling

ASEAN

Overview

The ASEAN region is home to nearly 661.8 million people.³⁴ It comprises 10 Member States, namely Brunei Darussalam, Cambodia, Indonesia, Malaysia, Myanmar, Lao PDR, Singapore, Thailand, the Philippines, and Viet Nam. With a growth rate of 0.9 per cent per annum, the population is predicted to reach 741.2 million by 2035.³⁵ The prevalence of people with disabilities (PWDs) is at 16 per cent,³⁶ or around 118 million people. Meanwhile, about 49.2 per cent of the ASEAN population reside in urban areas.³⁷

Young people are widely considered as key agents in boosting growth and development in ASEAN, with youth constituting 34 per cent of the total population in the region.³⁸ Despite this, unemployment has been a central concern for this demographic, especially in light of the COVID-19 pandemic. As shown in Fig. 2.1, the youth unemployment rate rose from 8.9 per cent in 2019 to 10 per cent in 2020.³⁹ Unemployment figures in Brunei Darussalam, Malaysia, and Singapore also hit double digits at 23.1 per cent, 14.0 per cent, and 10.6 per cent, respectively.

³⁴ ASEAN Secretariat. (2021). *ASEAN Statistical Yearbook 2021*, in https://www.aseanstats.org/wp-content/uploads/2021/12/ASYB_2021_All_Final.pdf

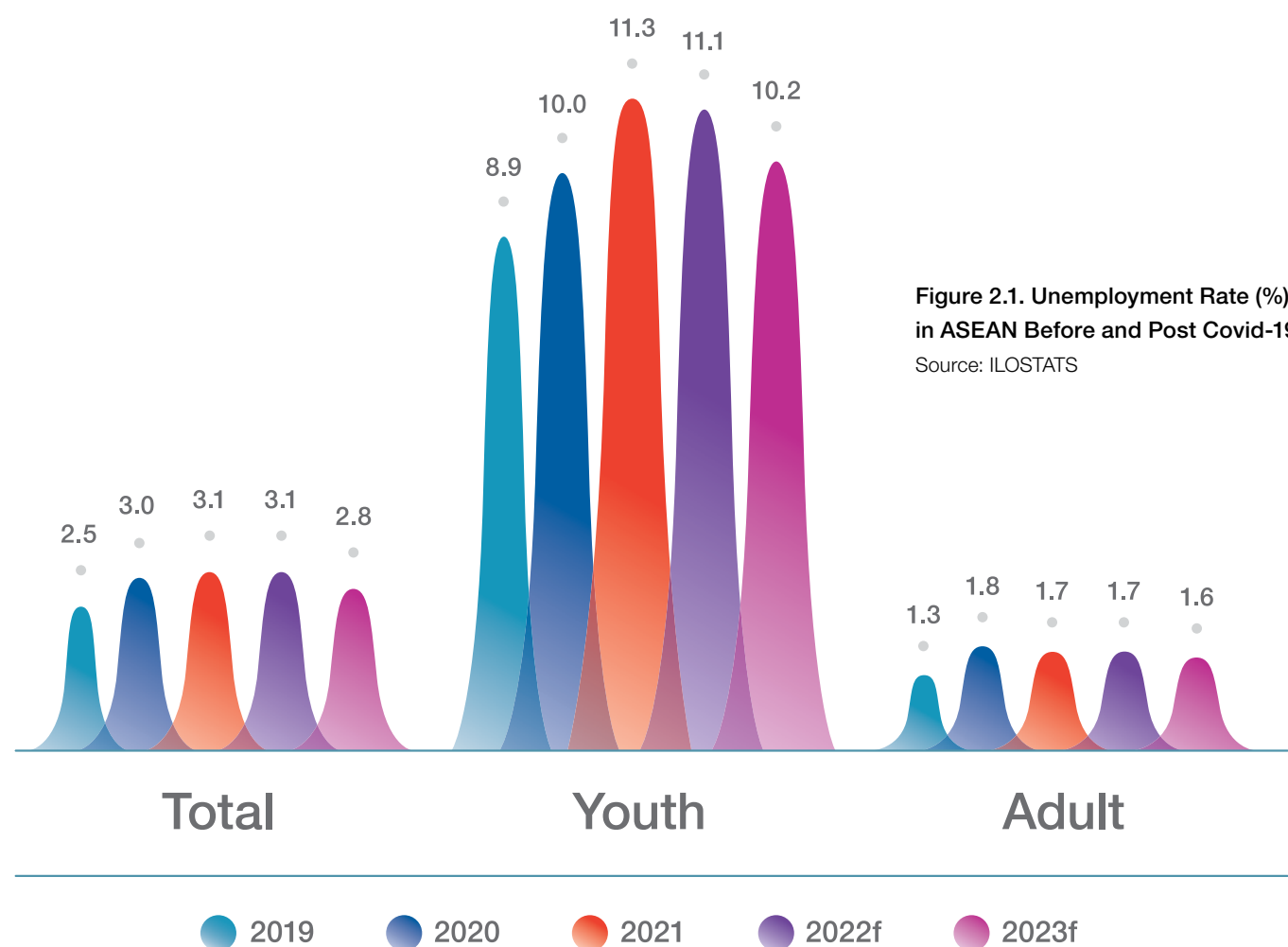
³⁵ Ministry of International Trade and Industry. (n.d.) *ASEAN+6 population forecast: Global share, aging and dependency ratio*, in https://www.miti.gov.my/miti/resources/fileupload/ASEAN_Population%20Forecast.pdf

³⁶ Reporting ASEAN. (2021). *ASEAN Disability Laws Lag Far Behind Daily Realities*, in <https://www.reportingasean.net/asean-disability-laws-lag-far-behind-daily-realities/>

³⁷ Calculated based on <https://www.statista.com/statistics/804503/urbanization-in-the-asean-countries/>

³⁸ ASEAN Secretariat. (2021). *Understanding how young people see ASEAN: Awareness, value, and identity. Brief version*, in https://asean.org/wp-content/uploads/2021/09/BRIEF-VERSION_ASEAN-YDI.pdf

³⁹ ILOSTAT. (2022). *Unemployment rate, based on sex and age – ILO-modelled estimates, November 2021*, in https://www.ilo.org/shinyapps/bulkexplorer7/?lang=en&segment=indicator&id=UNE_2EAP_SEX_AGE_RT_A



Employability Landscape

The COVID-19 outbreak has caused the regional economy to contract to -3.3 per cent in 2020, dropping steeply from 4.4 per cent in 2019.⁴⁰ It also aggravated the difficulty for young workers to move between jobs. ILO reported that in 2020, working hours in ASEAN dropped dramatically by 8.4 per cent, equal to 24 million full-time workers assuming a 48-hour work week.⁴¹ A surge in unemployment rates was observed in contact-intensive sectors such as services, which represents a considerable share of employment in Singapore (80.6 per cent), Brunei Darussalam (69.2 per cent), and Malaysia (69.2 per cent).⁴²

The COVID-19 crisis has especially impacted young people. Youth employment losses among ASEAN youth (6.2 per cent) also exceeded those of their adult counterparts (2.8 per cent).⁴³ In Indonesia, the Philippines, Thailand, and Viet Nam, people aged 15 to 24 accounted for as much as 45 per cent of job losses at the peak of the pandemic in 2020.⁴⁴ It led to a disruption in the school-to-work transition of more than 15 million new university and school graduates

⁴⁰ ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*.

⁴¹ *Ibid.*

⁴² ASEAN (2021) *ASEAN Key Figures 2021*, in <https://www.aseanstats.org/wp-content/uploads/2021/12/ASEAN-KEY-FIGURES-2021-FINAL-1.pdf>

⁴³ ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*.

⁴⁴ ADB. (2021). *COVID-19 and labour markets in Southeast Asia*.

from the 10 ASEAN member countries.⁴⁵ Even with expected improvements in overall employment rates in 2022 and 2023 upon the resumption of business and travel in the region, predictions point to persistent gaps between youth and adult unemployment and a possible scarring⁴⁶ effect in the post-pandemic.

The youth's high engagement in the pandemic's hardest-hit sectors led to more severe impacts for this group. These sectors are wholesale and retail trade and repair, manufacturing, rental and business services, and accommodation and food services, which employ more than 100 million young workers in Asia and the Pacific with an overrepresentation of women in the accommodation and food services.⁴⁷ Around 43 million young people in Southeast Asia and the Pacific are also employed in informal sectors (including MSMEs) in South-eastern Asia and the Pacific,⁴⁸ which contributes to the high incidence of job losses among youth in the region.⁴⁹

In addition to young people, women have also been disproportionately affected by the pandemic⁵⁰, and who themselves have traditionally faced labour market

challenges in many parts of Southeast Asia.⁵¹ ASEAN youth PWDs face even more barriers in labour market integration caused by disability stigma and the complexity of service provision to support their employment. Overall, challenges remain for PWDs to explore career options, access living and social arrangements, and make economic decisions.⁵²

In response to the challenges posed by COVID-19, ASEAN leaders adopted a series of measures to mitigate and minimise the health and economic impact of the pandemic on young people toward sustainable recovery. During the 37th ASEAN Summit In November 2020, the ASEAN Comprehensive Recovery Framework (ACRF) and its implementation plan were adopted, setting the priority on promoting 'a contextualised understanding of 21st-century skills that is meaningful for adolescents and youth and aligned

⁴⁵ Compiled from various sources, including

- ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*.
- World Bank. (2021). *Pathways to Middle-Class Jobs in Indonesia*, in <https://documents1.worldbank.org/curated/en/254651624512296240/pdf/Overview.pdf>
- Daorueng. P. (2020). *Government agrees to subsidise salaries of new graduates*, in <https://www.universityworldnews.com/post.php?story=20200918155832363>
- Data Singapore. (2022). *Intake, enrolment, and graduates by institutions*, in https://data.gov.sg/dataset/intake-enrolment-and-graduates-by-institutions?resource_id=2264a6ed-51f5-45d6-accb-1a980e32e632
- Hanoi Times. (2020). *Over 98% of Vietnam high school students pass national exam*, in <https://hanoitimes.vn/over-98-of-vietnam-high-school-students-pass-national-exam-314016.html>
- Statista. (2021). *Number of university graduates in Vietnam 2016-2019*, in <https://www.statista.com/statistics/815123/number-of-university-graduates-in-vietnam/>
- VOA Cambodia. (2021). *After a year of disruptions, university applications are looming over recent graduates*, in <https://www.voacambodia.com/a/after-a-year-of-disruptions-university-applications-are-looming-over-recent-graduates/5772781.html>
- RFA. (2021). *College graduates in Laos face bleak jobs prospects amid pandemic shutdowns*, in <https://www.rfa.org/english/news/laos/job-08122021162456.html>

⁴⁶ A 'scarring effect' refers to the long-term drawbacks derived from high youth unemployment. It exacerbates the situation where young people earn less, lose their potential, and increase their difficulty to secure jobs. This phenomenon negatively affects the country's economy, especially in countries with a young demographic.

⁴⁷ ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*.

⁴⁸ ILO. (2020). *Tackling the COVID-19 youth employment crisis in Asia and the Pacific*.

⁴⁹ ILO. (2020). *Asia-Pacific employment and social outlook*.

⁵⁰ ILO. (2021). *COVID-19 and the ASEAN labour market: Impact and policy response*.

⁵¹ ADB. (2021). *COVID-19 and labour markets in Southeast Asia*.

⁵² UNESCO. (2020). *International Day of Persons with Disabilities 2020 Webinar*, in [https://bangkok.unesco.org/sites/default/files/assets/article/Education/files/Concept%20note%20\(ver20Nov\).pdf](https://bangkok.unesco.org/sites/default/files/assets/article/Education/files/Concept%20note%20(ver20Nov).pdf)

with the interests of national economies'.⁵³ ASEAN governments also aim to target disabled groups and 'develop disability inclusive resilience plans including risk assessments, emergency response plans, and recovery and rehabilitation plans, and allocate resources, and ensure active involvement of persons with disabilities, particularly children, women, youth and elderly/older persons'.⁵⁴

At the country level, ASEAN member states have also introduced several policy responses to reduce the pandemic's economic impact on young people. Malaysia implemented the *Penjana* stimulus package to provide allowances for employers to generate jobs, including for young people.⁵⁵ The incentives were initially offered for employers to hire and train 300,000 unemployed people and included an allowance of RM 600 per month covering six months of apprenticeships for school leavers and graduates.⁵⁶ Meanwhile, the Indonesian government has launched the *Kartu Prakerja* (Pre-Employment

Card) programme. Focusing on young people over the age of 18, it aims for unemployed groups (e.g., laid-off workers, recent graduates, and entrepreneurs) to benefit from re-skilling and upskilling activities while receiving a monthly incentive of 600 thousand Indonesian rupiah for up to 4 months.⁵⁷

⁵³ ASEAN Secretariat. (2020). *ACRF Implementation Plan*, in https://asean.org/wp-content/uploads/2021/08/ACRF-Implementation-Plan_Pub-2020.pdf, p. 17.

⁵⁴ *Ibid.*, p.14.

⁵⁵ Fulcrum. (2021). *The COVID-19 recession: Rough times for young Malaysians*, in <https://fulcrum.sg/the-covid-19-recession-rough-times-for-young-malaysians/>

⁵⁶ ILO. (2020). *Tackling the COVID-19 youth employment crisis in Asia and the Pacific*.

⁵⁷ Kompas. (2020). *Catat, Kartu Prakerja Diprioritaskan untuk Pengangguran Muda*, in <https://money.kompas.com/read/2020/04/08/180300826/catat-kartu-prakerja-diprioritaskan-untuk-pengangguran-muda?page=all>

Skills Demand

According to LinkedIn's 2021 Southeast Asia Jobs on the Rise Report, there is a growing demand for jobs in 15 sectors,⁵⁸ namely data analysis, software and technology, cyber security, specialised engineering, digital content, digital marketing, public relations, e-commerce, business development and sales, customer service, supply chain, healthcare and medical support, education, finance and insurance, and healthcare and medical frontline. The report further noted that out of the 67 fast-growing positions in 2020, 41 would require digital proficiency, and 12 would demand high levels of advanced digital skills.

There is a looming uncertainty around the full resumption of pre-pandemic activities and mobility in ASEAN countries. Hence, work-from-home (WFH) arrangements are still widely implemented by most Southeast Asian employers. Shifts in lifestyle and consumer behaviour were observed as a consequence, especially increased levels of worker mobility and engagement in e-commerce activities. Meanwhile, the pandemic has also prompted sectors

whose operations were traditionally managed face-to-face (e.g., manufacturing, healthcare, and hospitality) to embrace digitalisation and explore business models with online forms of delivery (e.g., adoption of telemedicine for healthcare services). In terms of skills, job roles appear to strongly demand artificial intelligence (AI), while soft skills are increasingly valued as automation becomes ubiquitous.⁵⁹

In line with the latter trend, the survey revealed that self-leadership (e.g., entrepreneurship and time management) and interpersonal skills (e.g., teamwork and social influence) have helped around two-thirds of young workers gain employment (Fig. 2.2). More than half of ASEAN youth respondents (55.2 per cent) also felt that cognitive skills (e.g., critical thinking and project management) have been useful in helping them land their current jobs. Meanwhile, less than half of young people felt that basic (44.4 per cent) and advanced digital skills (26.8 per cent) were instrumental in the hiring process.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

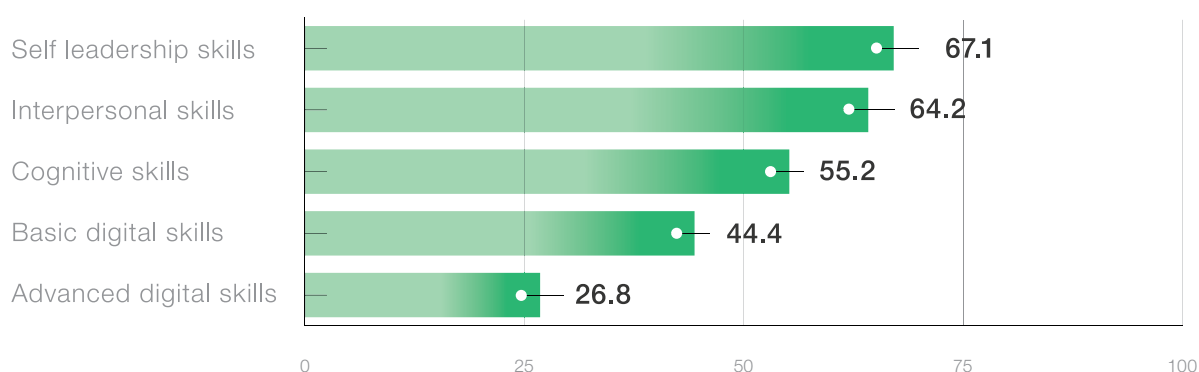


Figure 2.2. Skills Found to be Helpful in Finding a Job in ASEAN

Source: LOKA Group (2022)

⁵⁸ LinkedIn. (2022). *Jobs on the Southeast Asia 2021*, in <https://business.linkedin.com/talent-solutions/resources/talent-acquisition/jobs-on-the-rise-sea>

⁵⁹ LinkedIn. (2019). *The jobs of tomorrow: LinkedIn's 2020 emerging jobs report*, in <https://blog.linkedin.com/2019/december/10/the-jobs-of-tomorrow-linkedins-2020-emerging-jobs-report>

Qualitative data from KIs with employers in 10 ASEAN countries support the aforementioned findings, confirming the continued relevance of soft skills in labour market participation. Box 1.1 summarises the main points on the skills-to-employment trends gathered from the interviews.

Box 2.1. Skills-To-Employment Trend in ASEAN

Source: LOKA Group (2022)

‘While digital skills are extremely important for young people, mastering soft skills – particularly communication, collaboration, and teamwork – remain highly crucial for one to qualify in his or her role. COVID-19 has also changed the way of working among employers: Employment has gone increasingly digital and thus there is less supervision from supervisors to subordinates, requiring one to master self-responsibility and integrity in performing daily work duties. There is no more clocking in and out in the workplace to monitor workers’ attendance. The culture of work has also become increasingly more KPI- or results-based.’

Skills Supply

The survey responses reveal that young workers tend to perceive higher proficiency in soft skills than digital skills. Taken together, having moderate to expert proficiency in self-leadership has been reported by 77 per cent of the respondents, followed by interpersonal (73.9 per cent) and cognitive skills (72.5 per cent) (see Fig. 2.3). A little more than half of the respondents (52.2 per cent) found themselves to have moderate to expert proficiency in basic digital skills. Meanwhile, approximately one-third (36.6 per cent) have no advanced digital skills, while 72.3 per cent report having no or low proficiency levels in this domain.

Mastery of Future Skills

Share of respondents (%)

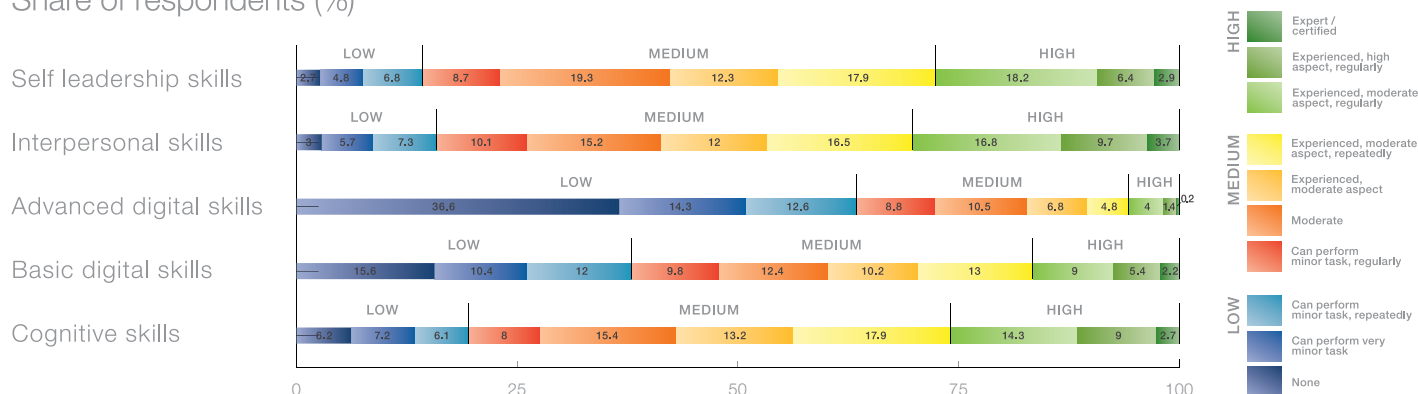


Figure 2.3. Mastery of Future Skills in ASEAN

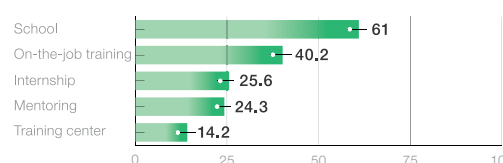
Source: LOKA Group (2022)

Learning Behavior

The most prevalent form of skills acquisition among ASEAN youth is through formal education, as reported by more than 60 per cent of the respondents (Fig. 2.4). Some of them were also able to acquire skills outside the school setting through on-the-job training (40.2 per cent), internships (25.6 per cent), and mentorships (24.3 per cent). Attending training centres was the least common way of acquiring skills among those surveyed at 14.2 per cent. Overall, slightly less than half of the respondents have participated in any training (47.6 per cent), with most (66.5 per cent) attending privately-organised programmes. Meanwhile, 43.6 per cent have attended government-provided training.

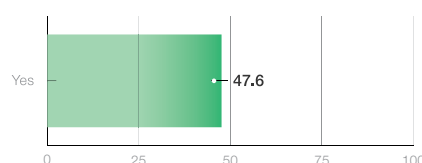
ASEAN: Means to Acquire Skills

Share of respondents (%)



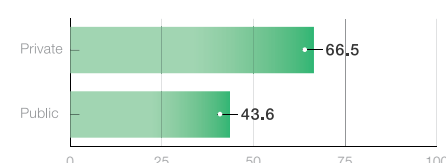
ASEAN: Training Participation

Share of respondents (%)



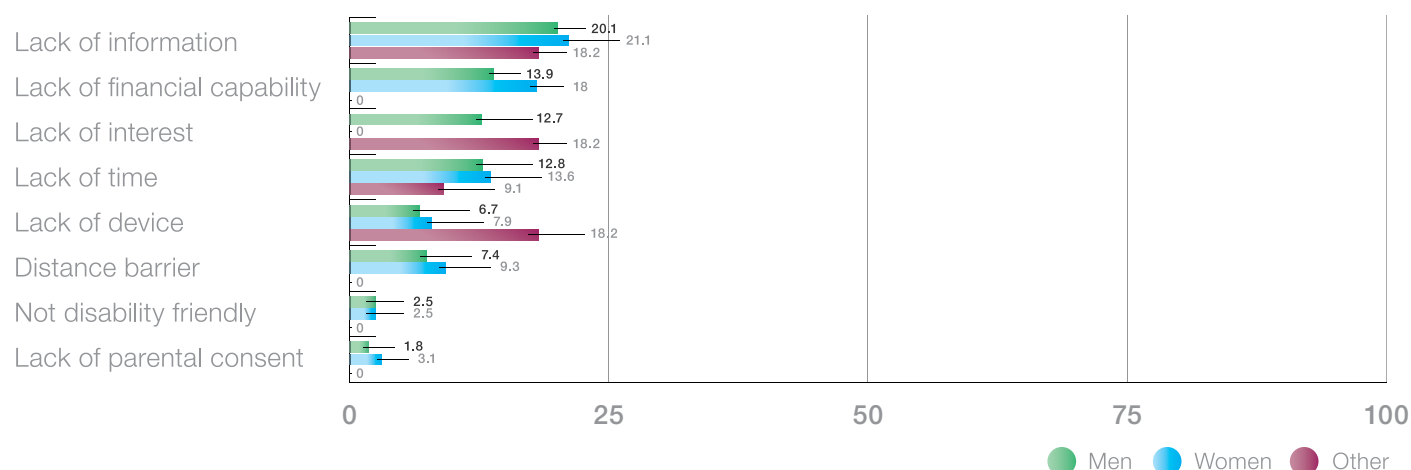
ASEAN: Participation in Training Institutions

Share of respondents (%)



ASEAN: Challenges to Take Training

Share of respondents, by gender (%)



ASEAN: Challenges to Take Training

Share of respondents (%)

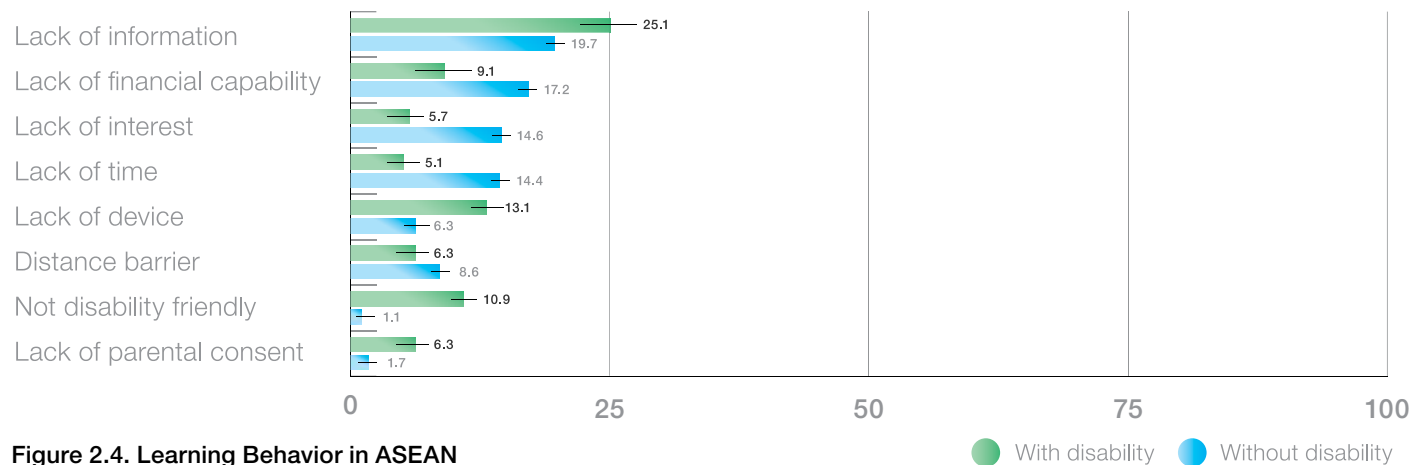


Figure 2.4. Learning Behavior in ASEAN

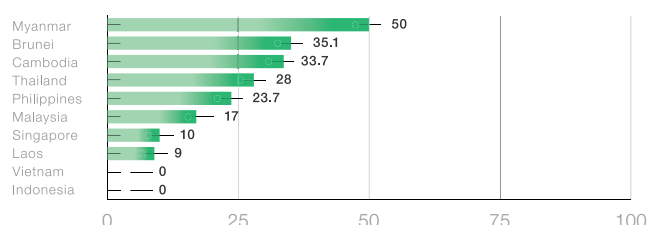
Source: LOKA Group (2022)

ASEAN youth's limited training participation is found to be mainly due to a lack of available information (Fig. 2.5), followed by lack of financial resources, time constraints, and disinterest in joining the training. There are notable differences in the prevalence of these challenges across ASEAN countries. For instance, young people in Myanmar are the most impacted by a lack of information, with 1 out of 2

young people reporting this barrier. Filipino youth are most likely to experience financial challenges (36.1 per cent) to attend training than other young people in ASEAN, while time constraints are most likely to affect youth from Brunei (26.1 per cent). The study also revealed that 15.7 per cent of young Southeast Asians had to move from their cities of origin to participate in training.

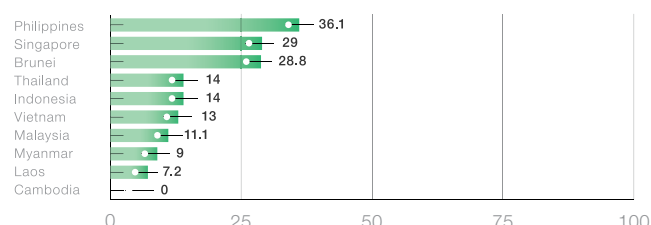
Top 1 Barrier: Lack of Information

Share of respondents (%)



Top 2 Barrier: Lack of Financial Capacity

Share of respondents (%)



Top 3 Barrier: Lack of Time

Share of respondents (%)

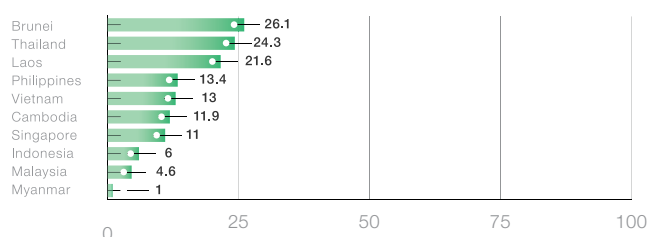


Figure 2.5. Top Three Training Challenges in ASEAN

Source: LOKA Group (2022)

Between groups, the results show that young women are more likely to face barriers to attending training than young men in terms of availability of information, financial resources, time, proximity to training sites, and parental consent (Fig. 2.5). Meanwhile, young PWDs are more affected by issues around access to information and device use than those without a disability. As can be expected, they are also more likely to experience barriers related to a lack of disability-friendly training programmes.

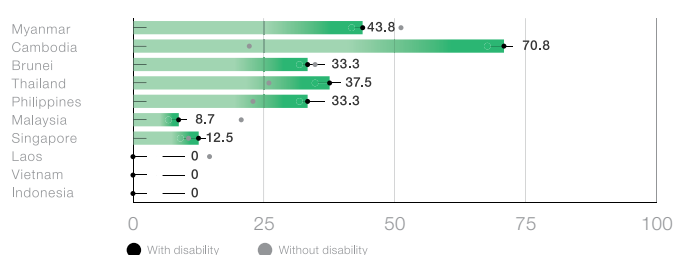
Between-country differences also exist regarding the challenges that young PWDs encounter in accessing training. For instance, 70.8 per cent of young Cambodian PWDs cited lack of information as a major challenge, compared to only 8.7 per cent among Malaysian respondents (Fig. 2.6). Similar to the findings of a 2012 study, the unavailability of information channels and services continues to constrain PWDs' access to education and

employment.⁶⁰ There are also gaps in the availability of proper devices to access training between ASEAN countries, with more than 45.8 per cent of young PWDs in Cambodia experiencing this barrier compared to only 12.5 per cent of their Singaporean

counterparts (Fig. 2.6). Instead, the lack of disability-friendly materials is identified by young PWDs in Singapore as the prime reason for not accessing training.

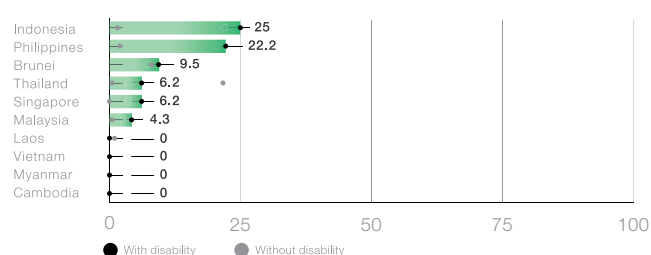
ASEAN: Lack of Information as a Challenge to Take Training

Share of respondents (%)



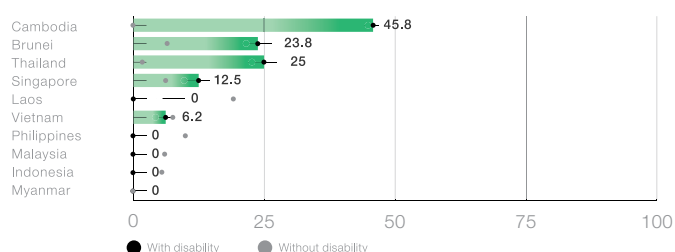
ASEAN: Lack of Parental Consent as a Challenge to Take Training

Share of respondents (%)



ASEAN: Lack of Device as a Challenges to Take Training

Share of respondents (%)



ASEAN: Not Disability Friendly as a Challenge to Take Training

Share of respondents (%)

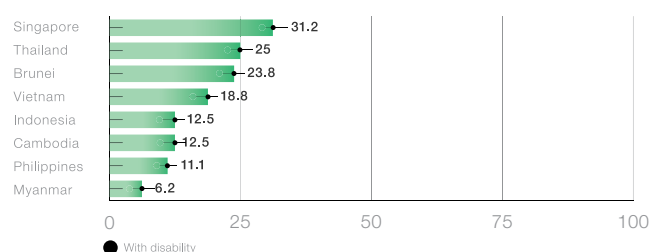


Figure 2.6. Training Challenges for Young PWDs in ASEAN⁶¹

Source: LOKA Group (2022)

Overall, the findings suggest that the absence of information and lack of ownership of necessary devices have primarily constrained PWDs in ASEAN, albeit with variations between countries. Both of these issues are addressed and documented under the Key Action Points of the document 'ASEAN Enabling Masterplan 2025: Mainstreaming the Rights of

Persons with Disabilities',⁶² highlighting the need for its prompt implementation to alleviate the most pressing issues to training access faced by young PWDs in the region.

⁶⁰ Bavvi, S. V. (2012). *Understanding the challenges of disability in Myanmar*, in https://www.burmalibrary.org/docs13/Understanding_the_Challenges_of_Disability_in_Myanmar-red.pdf

⁶¹ The data shown here are based on answers provided by respondents. Those countries with no available responses are not included in the figure.

⁶² ASEAN (n.d.) *ASEAN Enabling Masterplan 2025: Mainstreaming the Rights of Persons with Disabilities*, in <https://aichr.org/wp-content/uploads/2019/01/ASEAN-Enabling-Masterplan-2025-Mainstreaming-the-Rights-of-Persons-with-Disabilities.pdf>

Professional Aspirations and Skilling Needs

As for professional aspirations, it was found that an estimated 1 out of 3 (35.3 per cent) young Southeast Asians have the desire to become entrepreneurs, while approximately 1 out of 4 aspire to work in the government sector (26.2 per cent) (Fig. 2.7). Other sectors that ASEAN youth would like to work in include technology (18.2 per cent), education (17.9 per cent), NGOs (16.7 per cent), and finance (12.4 per cent). Meanwhile, only a few see their future career in the healthcare (6 per cent), transportation (5.8 per cent), and energy sectors (4.3 per cent).

ASEAN: Job Aspirations
Share of respondents (%)

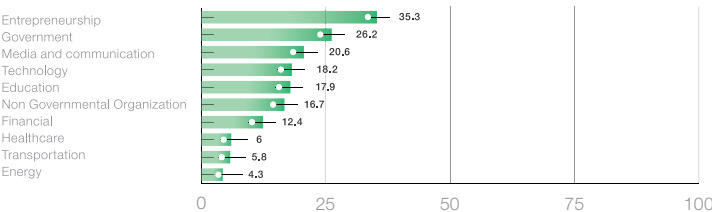


Figure 2.7. Job Aspirations in ASEAN
Source: LOKA Group (2022)

ASEAN: Upskilling and Reskilling
Share of respondents (%)

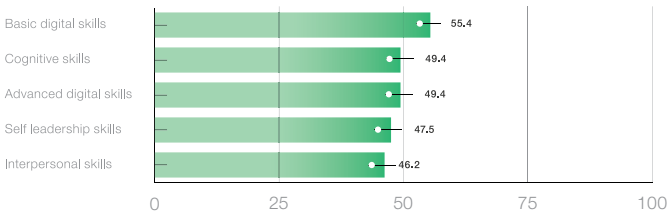


Figure 2.8. Skills to Upskill and Reskill in ASEAN
Source: LOKA Group (2022)

In terms of reskilling, young workers in the region demonstrate awareness of the digital gap, with more than 50 per cent of ASEAN youth expressing the need to enhance their basic digital skills (Fig. 2.8). While more than 70 per cent of young people report moderate to expert proficiency in cognitive, interpersonal, and self-leadership skills, there remains an appetite for reskilling in this domain, thus suggesting their relevance in meeting employers' demands. These skills are especially relevant as employers appear to shift away from valuing conformity among their employees toward ascribing greater value to innovative capacity. However, only less than half of those surveyed think they need to acquire advanced digital skills, despite more than 70 per cent reporting to lack these skills.

Overall, the findings reveal an overarching desire among young people in ASEAN to leverage digitalisation and creativity in their future work. However, they need to be equipped with sufficient reskilling and upskilling opportunities that adequately consider the needs of the marginalised. Given the increased appetite for entrepreneurship among ASEAN youth, access to credits and tailored capacity building will be paramount in the future landscape of work in the region. To achieve this, there must be a consolidated effort to establish close partnerships between governments, work associations, private sectors, and civil society.

03

Country Overview

Brunei Darussalam

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Brunei Darussalam

Overview

Brunei Darussalam is a sultanate in ASEAN situated in the land of Borneo with a total population of 429,999 people.⁶³ 16.14 per cent of Brunei citizens are young people aged 15-24 as of 2020,⁶⁴ while 10.1 per cent are above the age of 60.⁶⁵ It is predicted that the country's share of the elderly population will increase to 16.0 per cent in 2040.⁶⁶ 2.1 per cent or 9,000 people are registered as having disabilities.⁶⁷

Due to its economic reliance on the oil and gas sector,⁶⁸ Brunei Darussalam is confronted by high unemployment and low economic growth. The industries with the highest employment shares in the country are public administration (22.5 per cent), wholesale and retail trade (17.2 per cent), and construction sectors (12 per cent).⁶⁹ Around 65.3 per cent of the workforce are employed informally,⁷⁰ while only 17 per cent of the working age population hold formal jobs.⁷¹

With a heavy concentration of jobs in the services sector, the global pandemic deepened the unemployment situation in the country and prompted the need for economic diversification. A slight increase in the unemployment rate was noted before and during the pandemic, from 6.9 per cent in 2019 to 7.7 per cent in 2020. The same trend can be observed for youth unemployment, which increased by 1.7 percentage points from 2019 to 23.1 per cent in 2020.⁷² Young women are also more likely to be unemployed (26.9 per cent) than young men (20.6 per cent) by 6.2 percentage points.⁷³

⁶³ Department of Economic Planning and Statistics. (2021). *Population*, in <http://www.deps.gov.bn/SitePages/Population.aspx>

⁶⁴ Index Mundi. (2021). *Brunei demographics profile*, in https://www.indexmundi.com/brunei/demographics_profile.html

⁶⁵ Department of Economic Planning and Statistics. (2021). *Banci Penduduk dan Perumahan 2021*, Laporan Kiraan Awal Jumlah Penduduk Tahun 2021, in <http://www.deps.gov.bn/DEPD%20Documents%20Library/DOS/POP/2021/BPP2021.pdf>

⁶⁶ Statista (2021) *Share of aging population Brunei 2015-2040*, in <https://www.statista.com/statistics/713499/brunei-aging-population/>

⁶⁷ ASEAN Today. (2018). *Brunei has equal opportunities problems*, in <https://www.aseantoday.com/2018/04/bruneis-equal-opportunities-problem/>

⁶⁸ Kementerian Kewangan dan Ekonomi Brunei Darussalam. (2020). *Towards a dynamic and sustainable economy*, in http://www.deps.gov.bn/DEPD%20Documents%20Library/NDP/BDEB/Econ_Blueprint.pdf

⁶⁹ Department of Economic Planning and Statistics (2021). *Employment by sector*, in <http://www.deps.gov.bn/SitePages/Employment%20by%20Sector.aspx>

⁷⁰ Department of Economic Planning and Statistics (2021). *Employment in the informal economy*, in <http://www.deps.gov.bn/SitePages/Employment%20in%20the%20informal%20economy.aspx>

⁷¹ The Commonwealth. (2021). *Terms of reference: Consultant – Development of youth entrepreneurship strategy and action plan – Brunei Darussalam*, in <https://production-new-commonwealth-files.s3.eu-west-2.amazonaws.com/migrated/inline/Terms%20of%20Reference.pdf>

⁷² ILOSTAT, January 2022.

⁷³ *Ibid.*

Employment Landscape

According to the 2020 Labour Force Survey, the service sector constitutes almost 75.0 per cent of employment in Brunei Darussalam. Micro, small, and medium-sized enterprises (MSMEs) are also a key aspect of the country's economy, accounting for more than 97 per cent of enterprises registered in Brunei and employ more than 57 per cent of the workforce.⁷⁴ These contact-intensive and high-informality sectors have been severely constrained by the pandemic, especially the hospitality industry and MSMEs in the service sector. Women workers were exposed to higher risks of job loss, especially since they represent 89.2 per cent⁷⁵ of the employment share in the hard-hit service sector. The country's tourism industry also suffered a big blow during the pandemic, experiencing the highest incidence of job loss in 2020 compared to the Philippines, Thailand, and Viet Nam. At least 40.5 per cent or two in five tourism jobs were lost during the year in Brunei Darussalam.⁷⁶

Beyond the pandemic, employment barriers have already long existed for vulnerable populations in the country, including persons with disabilities (PWDs), women, and youth. For instance, only 1.4 per cent of the total 9,282 registered PWDs are currently

employed.⁷⁷ Employers' stigma around youth PWDs coupled with lack of parental support are factors that hinder these individuals' access to employment.⁷⁸ For women, barriers continue to exist in accessing employment despite their high qualifications. For instance, at least 49 per cent of women in the country have been known to hold a STEM-related tertiary qualification, which is even higher compared to Singapore and the United States. Among the youth, there is a growing concern about rising rates of unemployment since 2018, particularly among TVET and tertiary graduates. This was predominantly influenced by the mismatch between the workforce's skills and the qualifications demanded by the job market. Youth's role aspirations also play a part, as 67 per cent prefer to work as government employees compared to only 19 per cent intending to start a business. This has resulted in low levels of working-age job applications among young people.⁷⁹

⁷⁴ ADB. (2020). *Asia Small and Medium-Sized Enterprise Monitor 2020*, in <https://www.adb.org/sites/default/files/publication/646146/asia-sme-monitor-2020-volume-1.pdf>

⁷⁵ ILOSTAT. (2022) *Employment by sector*, calculated from https://www.ilo.org/shinyapps/bulkexplorer57/?lang=en&segment=indicator&id=EMP_2EMP_SEX_ECO_NB_A

⁷⁶ ILO. (2021). *COVID-19 and employment in the tourism sector in the Asia-Pacific region*, in https://www.ilo.org/wcms/5/groups/public/asia/ro-bangkok/documents/briefingnote/wcms_827495.pdf

⁷⁷ The Scoop. (2020). *Pandemic hits people with disabilities hardest as inequality increases*, in <https://thescoop.co/2020/12/19/pandemic-hits-people-with-disabilities-hardest-as-inequality-increases/>

⁷⁸ Haji Roslan, N. and Diah, N. (2020). *To Work or Not to Work: The Struggle for Employment Among Youth with Disabilities in Brunei*, in https://www.researchgate.net/publication/344090304_To_Work_or_Not_to_Work_The_Struggle_for_Employment_Among_Youth_With_Disabilities_in_Brunei/link/5fd09cd6299bf188d4041e9f/download

⁷⁹ Khan, A. U. (2022). *Brunei's Youth Facing Unemployment*, in <https://theaseanpost.com/article/bruneis-youth-facing-unemployment>

To ensure job security for locals and protect the people's livelihood, the government launched economic relief and stimulus measures estimated at 332 million USD through income tax discounts, salary subsidies, discounts on utilities and rental rates of government buildings, deferment of social security contributions, exemption of customs and excise duties on selected products, deferment of

loan principal repayments, expanding the i-Ready apprenticeship scheme (a government-funded programme for unemployed job seekers to gain industry experience), and providing allowances for front liners.⁸⁰ Other fiscal measures include providing loans and individual and household cash assistance to the workforce.⁸¹

Skills Demand

In addition to the ongoing economic transition and diversification process, the pandemic has accelerated the Fourth Industrial Revolution (4IR) in Brunei Darussalam. The government's masterplan revolves around key areas to better implement the mission of driving and enhancing the country's socio-economic growth through digital transformation, especially industry digitalisation, government digitalisation, and manpower and talent development.⁸¹

In spite of these initiatives, the study found that digital skills are yet to become a prerequisite for employment in Brunei, with job-specific skills still taking precedence. For instance, the oil and gas sector, which is the biggest contributor to the country's economy, would still emphasise the need for young people to demonstrate the required technical skills pertaining to safety, risk, and leadership in operations despite an increasing dependence on digital skills

for remote work and virtual meetings as a result of the pandemic. IT-specific industries, however, are expected to put a premium on digital skills for roles in application and website development and digital communication.

Based on the results of the study, Brunei's youth acknowledge that interpersonal (74.8 per cent), self-leadership (73.0 per cent), and cognitive skills (64.0 per cent) were most instrumental to them securing a job position. More than half of the young people surveyed (56.8 per cent) also acknowledge the importance of basic digital skills in gaining employment, which exceeds the share of those who reported advanced digital skills as being important (37.8 per cent) (Fig. 3.1).

⁸⁰ Centre for Strategic and Policy Studies. (2021). *Brunei Economic Outlook*, in <http://www.csps.org.bn/wp-content/uploads/2021/01/Brunei-Economic-Outlook-2021.pdf>

⁸¹ Centre for Strategic and Policy Studies. (2020). *Brunei Economic Update*, in <http://www.csps.org.bn/wp-content/uploads/2020/07/Brunei-Economic-Update-July-2020.pdf>

⁸² APEC. (2020). *Brunei Darussalam and COVID-19: Shifting Towards Digital Transformation*, in http://mddb.apec.org/Documents/2020/MM/SMEMM/20_smemm_016.pdf

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

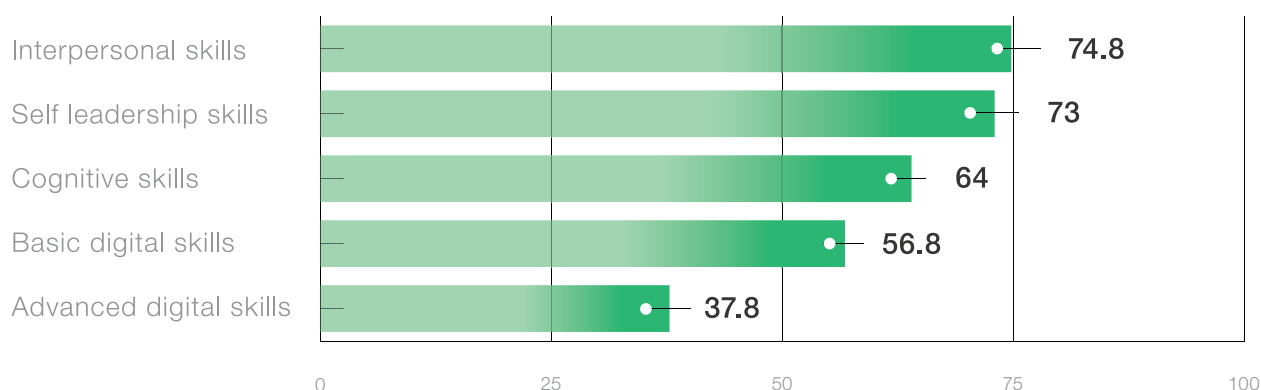


Figure 3.1. Skills Found to be Helpful in Finding a Job in Brunei Darussalam

Source: LOKA Group (2022)

Skills Supply

The results show that almost 1 out of 2 young people in the country either lack proficiency or have low levels of mastery of basic digital skills (45.0 per cent). This is an astonishing finding, considering that Bruneians have considerable access to devices (more than 50 per cent of the population) and cellular phones (95 per cent).^{83 84} At least 1 out of 3 young people also reported a complete lack of advanced digital skills, while around the same share of individuals (32.4 per cent) perceive having low levels of mastery for this skill set. Meanwhile, the majority report being highly skilled in self-leadership, interpersonal, and cognitive skills at 63 per cent, 64.8 per cent, and 62.2 per cent, respectively (Fig. 3.2).

Mastery of Future Skills

Share of respondents (%)

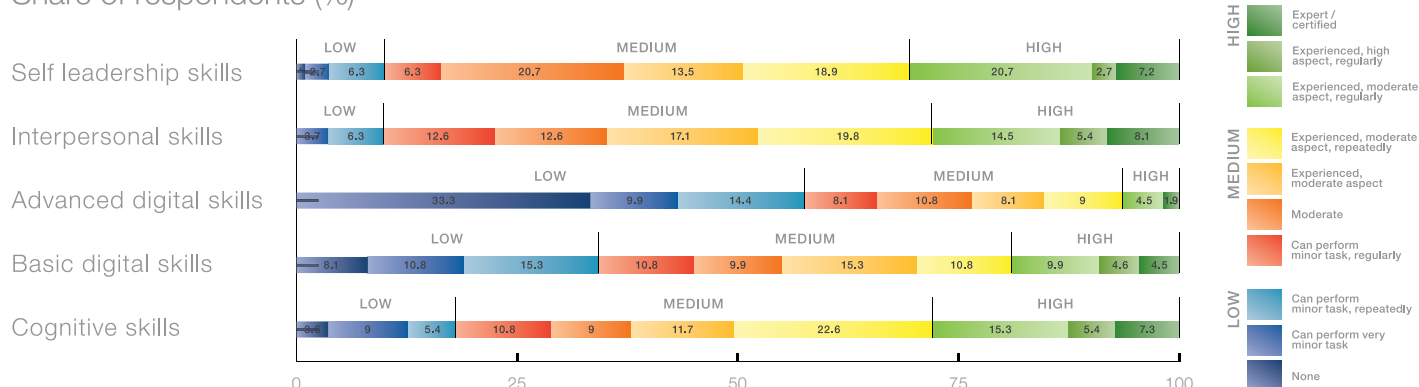


Figure 3.2. Mastery of Future Skills in Brunei Darussalam

Source: LOKA Group (2022)

⁸³ ASEAN. (2021). *ASEAN statistical leaflet 2021*, in https://www.aseanstats.org/wp-content/uploads/2021/10/ASEANStats_Leaflet_2021_15Oct.pdf

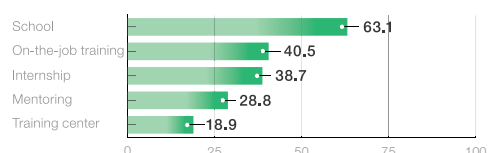
⁸⁴ ERIA. (2021). *Gender digital equality across ASEAN*, in <https://www.eria.org/publications/gender-digital-equality-across-asean/>

Learning Behaviour

In Brunei Darussalam, almost 2 out of 3 young people acquired their skills through formal schooling (63.1 per cent). More than 40 per cent learned their skills through on-the-job training and 38.7 per cent did so through internships. Meanwhile, less than a third (28.8) obtained their skills through mentoring, while attending training centres was the least common mode of skills acquisition among young Bruneians at 18.9 per cent. Overall, a high proportion of the respondents have benefited from non-school-based training (44.1 per cent), with the highest rates of participation observed in privately organised training (63.3 per cent) compared to publicly sponsored ones (53.1 per cent) (Fig. 3.3).

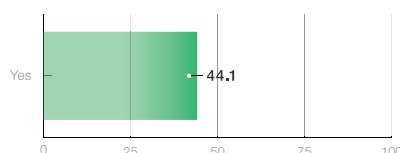
Brunei Darussalam: Means to Acquire Skills

Share of respondents (%)



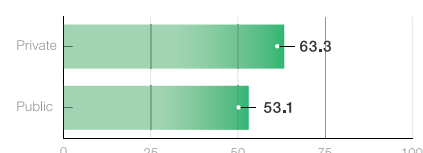
Brunei Darussalam: Training Participation

Share of respondents (%)



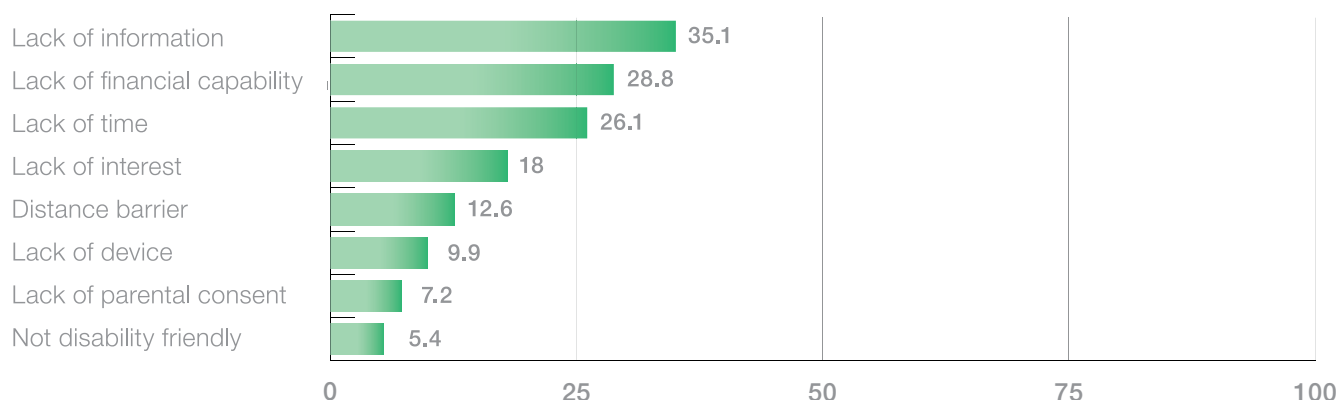
Brunei Darussalam: Participation in Training Institutions

Share of respondents (%)



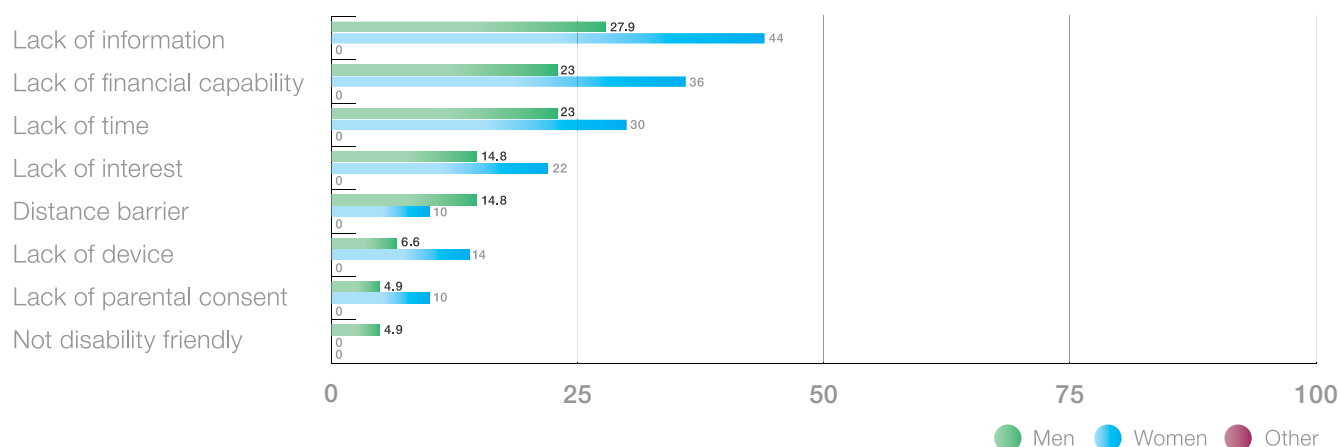
Brunei Darussalam: Challenges to Get Training

Share of respondents (%)



Brunei Darussalam: Challenges to Get Training

Share of respondents, by gender (%)



Brunei Darussalam: Challenges to Get Training

Share of respondents, by disability status (%)

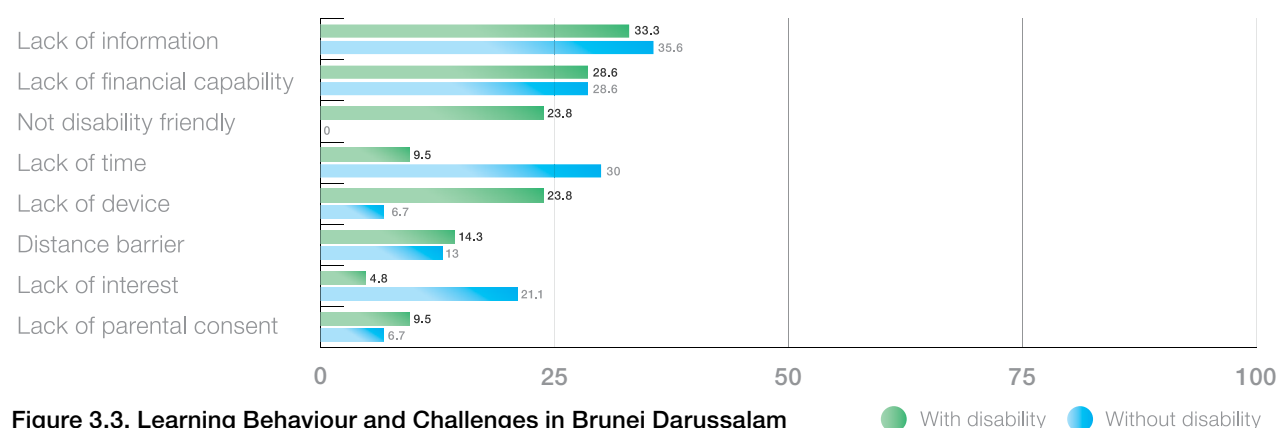


Figure 3.3. Learning Behaviour and Challenges in Brunei Darussalam

Source: LOKA Group (2022)

In terms of challenges to get training, Figure 3.3 shows that more than one-third of the respondents felt a lack of information was their main obstacle. Meanwhile, less than 30 per cent of respondents do not have the adequate financial capacity and sufficient time to access training. Other concerns such as lack of interest (18.0 per cent) and distance barriers (12.6 per cent) have also been cited. Few acknowledged lack of device ownership (9.9 per cent) and lack of parental support (7.2 per cent) as hindrances to their training participation.

The evidence from the study also suggests that young women are more likely to experience barriers to training than their male counterparts, except for those related to the availability of disability-friendly training. The biggest gender gap is observed in challenges pertaining to information and financial resources. Almost 45 per cent of young women regarded lack of information as the main hindrance to accessing training, compared to only almost 28 per cent of young men. Additionally, more than one-third of young women cannot afford the training, which is slightly higher compared to 23 per cent of men encountering this difficulty. The financial barrier is an important consideration in Brunei's context, as training offerings are often limited and do not necessarily align with employers' demands. As such, young workers face the challenge of having to pay more to access specific courses related to the skills demanded by employers. Women also tend to have less time to participate in training compared to men by 7 percentage points. Lastly, issues of gender bias

still prevail and disadvantage women. For instance, some job adverts, specifically for technical job roles, are only intended for men, thus inhibiting women to apply for such vacancies.

For PWDs, lack of device ownership has been the main constraint to training access. This concern was reported by at least 23.8 per cent of PWDs, compared to only 6.7 per cent among non-PWDs. Moreover, nearly 1 out of 5 young people with disabilities cited the lack of availability of disability-friendly training as a challenge. One possible reason for the low number of training provisions for PWDs is the existing disability stigma among employers. As the qualitative data in Box 2.1 suggests, there is a need to give more attention to how employers view and relate to PWDs.

'Sometimes, these people with disabilities need attention. Once the employer gives them attention by recognizing their achievement and praising them, these people with disabilities will feel like it's such a significant accomplishment. We might see those efforts as simple, but it is based on their hard work. So, for sure, they will feel happy. It can be a positive reinforcement.'
— Young PWDs in Brunei Darussalam

Box 3.1. Young PWDs' Insights in Brunei Darussalam

Source: LOKA Group (2022)

Professional Aspirations and Skilling Needs

Working in the government or public sector is highly desired by the young people in our study at 60.4 per cent. Other professional aspirations include becoming entrepreneurs (32.4 per cent), working in NGOs (29.7 per cent), and working in the education sector (24.3 per cent). Less than 20 per cent of young people seek careers in media and communication (19.8 per cent), energy (18 per cent), technology (18.2 per cent), healthcare (14.2 per cent), and the financial sector (13.5 per cent). Meanwhile, a very small proportion aspire to work in the transportation sector (4.5 per cent).

Brunei Darussalam: Job Aspirations
Share of respondents (%)

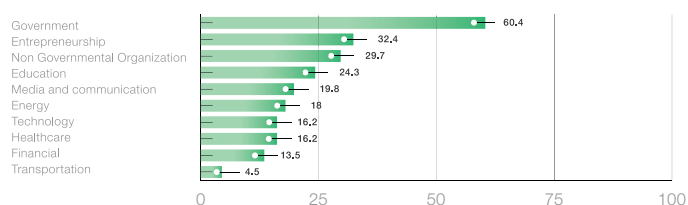


Figure 3.4. Job Aspirations in Brunei Darussalam

Source: LOKA Group (2022)

Brunei Darussalam: Upskilling and Reskilling
Share of respondents (%)

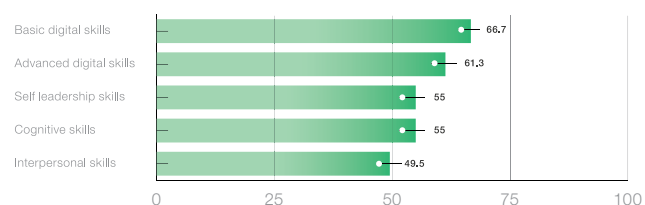


Figure 3.5. Skills to Upskill and Reskill in Brunei Darussalam

Source: LOKA Group (2022)

Alongside Brunei's digitalisation efforts, the majority of young people in the country feel the urgency to reskill and equip themselves with basic and advanced digital skills at 66.7 per cent and 61.7 per cent, respectively. There is also a rather moderate upskilling demand for skill sets that they already possess such as self-leadership and cognitive skills (55.0 per cent) and interpersonal skills (49.5 per cent). The importance of interpersonal skills (such as communication and management quality) has been found to be widely emphasised by the private sector representatives interviewed, more so than digital skills. They perceive that these are the types of skills that would be instrumental in helping companies solve pressing problems and in preparing for the post-pandemic world through innovation.

04

Country Overview

Cambodia

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Cambodia

Overview

Cambodia is home to the largest youth and adolescent population in the Southeast Asian region. Out of its 16.7 million inhabitants,⁸⁵ 60 per cent are under 25,⁸⁶ and one out of five Cambodians are aged 15 to 24.⁸⁷ Only 5 per cent are older than 65.⁸⁸ Over the last decade, the population has been growing at an average rate of 1.5 per cent per year.⁸⁹ The country is also considered to be in the early stage of demographic dividend, with a projected increase in the proportion of the working-age population until 2045.⁹⁰ Of the total population in Cambodia, at least 10 per cent or around 1.6 million people aged five and over are living with disabilities.⁹¹

The youth unemployment rate as of 2019 stood at 0.4 per cent, with young women more likely to be unemployed compared to young men.⁹² The pandemic has had a massive impact on youth employment in Cambodia, doubling the amount of youth unemployment to 0.8 per cent and widening the gap between young men and women by 0.2 per cent.⁹³

⁸⁵ World Bank. (2022). *Population*, total – Cambodia, in <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=KH>

⁸⁶ UNICEF. (2019). *Voices of youth applications open*, in <https://www.unicef.org/cambodia/stories/voices-youth-applications-open>

⁸⁷ UN Cambodia. (2020). *Decent employment for youth in Cambodia 2020-2023*, in https://open.unido.org/api/documents/17992206/download/DEY_Prodoc_phase%20%20_29052020%20-%20CLEAN.pdf

⁸⁸ World Bank. (2022). *Population ages 65 and above, total – Cambodia*, in <https://data.worldbank.org/indicator/SP.POP.65UP.TO?locations=KH>

⁸⁹ EuroCham Cambodia. (2021). *Business opportunities in Cambodia*, in <http://images.mofcom.gov.cn/cb/202111/20211130182009943.pdf>

⁹⁰ Ministry of Labour and Vocational Training Cambodia. (2019). *Policy on labour migration for Cambodia 2019-2023*, in <https://asean.org/wp-content/uploads/2021/12/1.-Labour-Migration-Policy-2019-2023.pdf>

⁹¹ Camroeun Microfinance Plc. (2020). *Needs assessment: People with disabilities' access to financial education and finance in Cambodia*, in https://www.findevgateway.org/sites/default/files/publications/submissions/80406/202011%2830%29_Needs%20Assessment%20Report_VF.pdf

⁹² ILOSTAT. January 2022.

⁹³ *Ibid.*

Employment Landscape

Before the pandemic, Cambodia's steady economic growth had provided more employment opportunities for young Cambodians to shift from agriculture to manufacturing or industry and service sectors.⁹⁴ However, the unprecedented spread of COVID-19 has disrupted the Cambodian economy and job market, hitting certain sectors hard such as tourism, trade and export, manufacturing, and construction. Cumulatively, these sectors contribute to 70 per cent of the country's economic growth and employ nearly 40 per cent of the workforce.⁹⁵ The UNDP cited that during the pandemic, job announcements dropped 80 per cent,⁹⁶ creating even more challenges for a smooth school-to-work transition among Cambodia's population. Young people who used to be in full-time employment are now primarily working part-time due to lower demand.⁹⁷

The vulnerability and informality of employment among young people in Cambodia is an utmost concern particularly for women and girls, with the pandemic likely exacerbating pre-existing inequalities in employment, income, and division of domestic labour.⁹⁸ Furthermore, a large proportion of young people in Cambodia are self-employed (67.5 per cent), of whom 50.8 per cent are unpaid family workers. Meanwhile, young women and men constitute around 79 per cent of the Cambodian migrant workforce, whose lack of adequate social protection exposes

them to the risk of abuse and discrimination in the workplace as well as social exclusion in general.⁹⁹ The barriers to accessing the job market for vulnerable groups such as women, youth, and persons with disabilities (PWDs) in Cambodia stem from a multitude of factors including limited education, gender role beliefs, and prevalent stigma. For young women, limited access to secondary and tertiary education has also been a challenge. Despite more than 63.0 per cent of females completing their lower secondary degree, only 14.3 per cent enrolled in tertiary education in 2021,¹⁰⁰ indicating limited advancement in education for young women. Furthermore, more than 37.1 per cent of the female workforce are employed in the services sector,¹⁰¹ signalling occupational segregation. Women have less access to higher-skilled occupations, public sector work, and networking compared to men. This landscape has increased the prevalence of women with vulnerable employment situations in sectors with high informality such as agriculture, forestry and fisheries, retail trade, garment, and family-owned businesses.¹⁰² The lack of job security in this sector, for instance, has put more than 200,000 women garment workers at risk of losing their job in the pandemic. In addition to gendered barriers, employment challenges are endured by young PWDs in the country. Employers tend to associate disability with an inability to work effectively, which has resulted

⁹⁴ AVI Perspective. (2020). *Cambodian youth employment trend before and during COVID-19*, in <https://www.asianvision.org/archives/publications/avi-perspective-issue-2020-no-12-cambodian-youth-employment-trend-before-and-during-covid-19>

⁹⁵ The Phnom Penh Post. (2021). *Informal economy may lose over 6M jobs by COVID's end*, in <https://www.phnompenhpost.com/national/informal-economy-may-lose-over-6m-jobs-covids-end>

⁹⁶ Focus Cambodia. (2020). *Cambodia's youth worry about job market during pandemic*, in <https://focus-cambodia.com/article/cambodias-youth-worry-about-job-market-during-pandemic/>

⁹⁷ Ibid.

⁹⁸ CARE. (2020). *CARE rapid gender analysis for COVID-19*, in <https://reliefweb.int/sites/reliefweb.int/files/resources/CARE%20Cambodia%20Rapid%20Gender%20Analysis%20for%20COVID-19%20FINAL%20APPROVED%20July%202020.pdf>

⁹⁹ OECD. (2022). *Key issues affecting youth in Cambodia*, in <https://www.oecd.org/countries/cambodia/youth-issues-in-cambodia.htm>

¹⁰⁰ Plan International. (2021). *The 2021 Asia-Pacific girls report: Voice, choice and power*, in <https://reliefweb.int/report/world/2021-asia-pacific-girls-report-voice-choice-and-power>

¹⁰¹ ILO. (2022). *Employment by sex and economic activity*, in https://www.ilo.org/shinyapps/bulkexplorer19/?lang=en&segment=indicator&id=EMP_2EMP_SEX_ECO_NB_A

¹⁰² CARE. (2020). *CARE rapid gender analysis for COVID-19*.

in PWDs being employed in low-status occupations or receiving low wages.¹⁰³ Other factors such as inadequate infrastructure and lack of family support have increased the difficulties PWDs face to access job opportunities.¹⁰⁴

Skills Demand

Cambodia is transitioning from a low-skilled, labour-intensive growth model to a skills-focused job market. It is predicted that a massive shift from routine and physical tasks towards more analytical, interpersonal, and non-routine functions would take place.¹⁰⁵ The government has also been advised to develop industry transformation maps in key sectors as the market continues to move into the Fourth Industrial Revolution (4IR).¹⁰⁶ As 4IR technologies come into operation, employment in the garment and tourism sectors are expected to expand, experiencing increases in productivity by 39.0 per cent and 2.0 per cent, respectively.¹⁰⁷

Considering Cambodia's economic and digital transformation, discussions with employers suggest an increasing demand for young people with foreign language proficiency (English) and basic to moderate communication skills in the digital environment. There is an overarching perception that young Cambodian workers are not adequately prepared in employing digital and internet technology in optimizing their work due to the lack of specialised training and learning materials in the school curriculum. As a result, there is a growing trend among employers to provide training in basic digital skills to young workers and ensure

that they remain transferable. In addition to acquiring digital skills, the employers in Cambodia observed a lack of communication and problem-solving skills, which they find valuable amidst the shift to digital modes of work.

In line with employers' skills demands, the study's findings suggest that more young people in Cambodia found basic digital skills to be helpful in finding a job (56.4 per cent) compared to cognitive skills (52.5 per cent) (Fig. 4.1). Nevertheless, it appears that self-leadership (76.2 per cent) and interpersonal skills (74.3 per cent) are far more useful than basic digital skills. This finding aligns with several remarks from private sector respondents, who emphasised that while digital skills are important, the ability to clearly communicate and work with a team will determine the extent to which digital skills are leveraged. In short, digital skills can only be acquired and practised if the employees have outstanding communication and teamwork skills. Understandably, only 11.9 per cent of young people found advanced digital skills useful in securing a job, given that the job roles requiring such proficiency are still underdeveloped in the country.

¹⁰³ Gartrell, A. (2010). *A frog in a well: The exclusion of disabled people from work in Cambodia*, in https://www.researchgate.net/publication/248912810_'A_Frog_in_a_Well'_The_Exclusion_of_Disabled_People_from_Work_in_Cambodia/link/55ac8ef608aea9946727afc0/download

¹⁰⁴ The ASEAN Post. (2020). *Cambodia's disabled left behind*, in <https://theaseanpost.com/article/cambodias-disabled-left-behind>

¹⁰⁵ Khmer Times. (2021). *ADB: Upskilling needed to reap benefits of Fourth Industrial Revolution*, in <https://www.khmertimeskh.com/50836285/adb-upskilling-needed-to-reap-benefits-of-fourth-industrial-revolution/>

¹⁰⁶ ADB. (2021). *Industry 4.0 could have transformational impact on skills and jobs in Cambodia – ADB study*, in <https://www.adb.org/news/industry-4-0-could-have-transformational-impact-skills-and-jobs-cambodia-adb-study>

¹⁰⁷ ADB. (2021). *Reshaping the Benefits of Industry 4.0 through Skills Development in Cambodia*, in <https://www.adb.org/sites/default/files/publication/671726/benefits-industry-skills-development-cambodia.pdf>

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

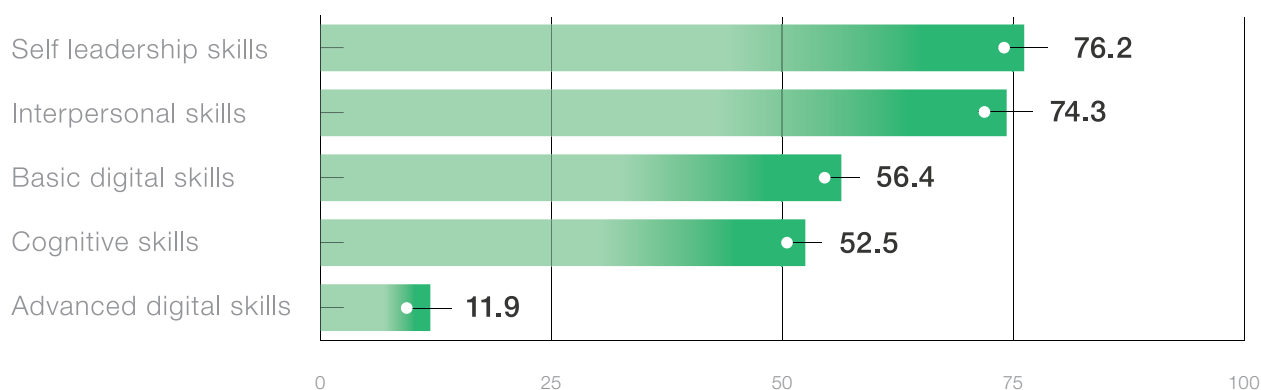


Figure 4.1. Skills Found to be Helpful in Finding a Job in Cambodia

Source: LOKA Group (2022)

Skills Supply

In terms of proficiency in future skills, Fig. 4.2 shows that nearly 1 out of 2 young people in Cambodia are not equipped with advanced digital skills (43 per cent), while nearly 1 out of 3 do not have proficiency in basic digital skills at all (31.7 per cent). In total, 87 per cent of Cambodian youth have none to low proficiency in advanced digital skills and 51.5 per cent of youth do not have or hold very limited proficiency in basic digital skills. The limited digital skills among Cambodian youth relate to the qualitative data gathered from employers on the inadequacy of the curriculum in equipping students with digital skills as well as the lack of digital skills among the educators themselves. In addition, proficiency in other skills is lower compared to other ASEAN countries. For instance, only slightly more than half of the young Cambodians surveyed are proficient in interpersonal skills at a moderate to expert level (58.4 per cent), followed by 56.4 per cent for cognitive skills and 55.5 per cent for self-leadership skills.

Mastery of Future Skills

Share of respondents (%)

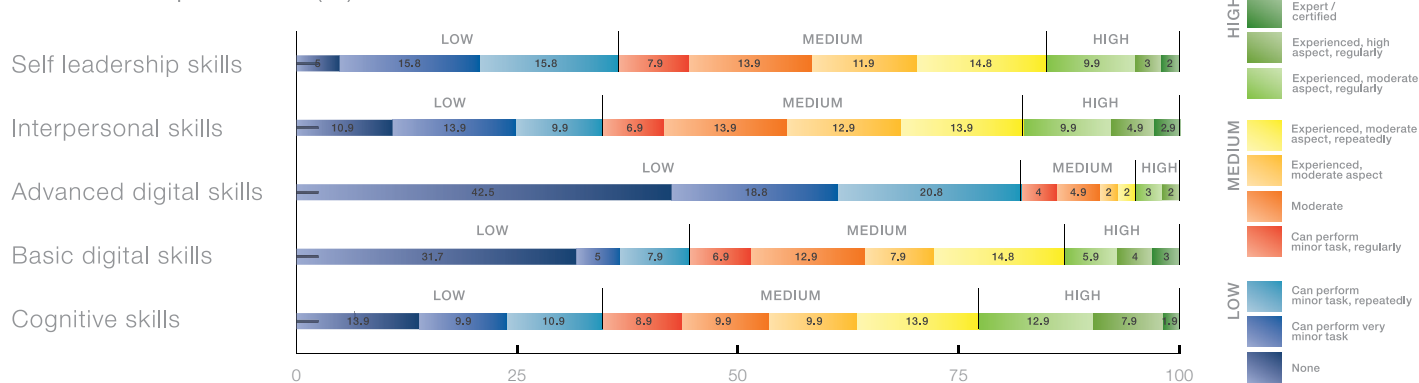


Figure 4.2. Mastery of Future Skills in Cambodia

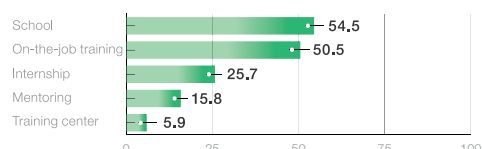
Source: LOKA Group (2022)

Learning Behaviour

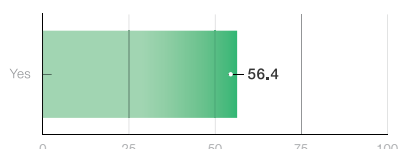
In Cambodia, young people tend to acquire skills formally (54.5 per cent) as well as upon the start of their career. Slightly over half of the respondents also acquired their skills from on-the-job training (50.5 per cent), while about 1 out of 4 young people cited internship as a source of their skills. A low proportion of young people developed their skills from mentoring (15.8 per cent) and training centres (5.9 per cent).

As shown in Fig. 4.3, over half of the respondents have participated in a training at least once (56.4 per cent). However, much of their training participation is provided by private rather than public institutions at 90.0 per cent and 21.1 per cent, respectively – demonstrating a participation gap of nearly 70 percentage points.

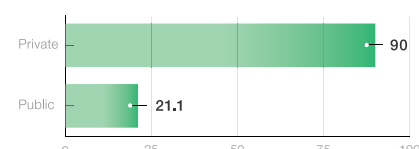
Cambodia:
Means to Acquire Skills
Share of respondents (%)



Cambodia:
Training Participation
Share of respondents (%)

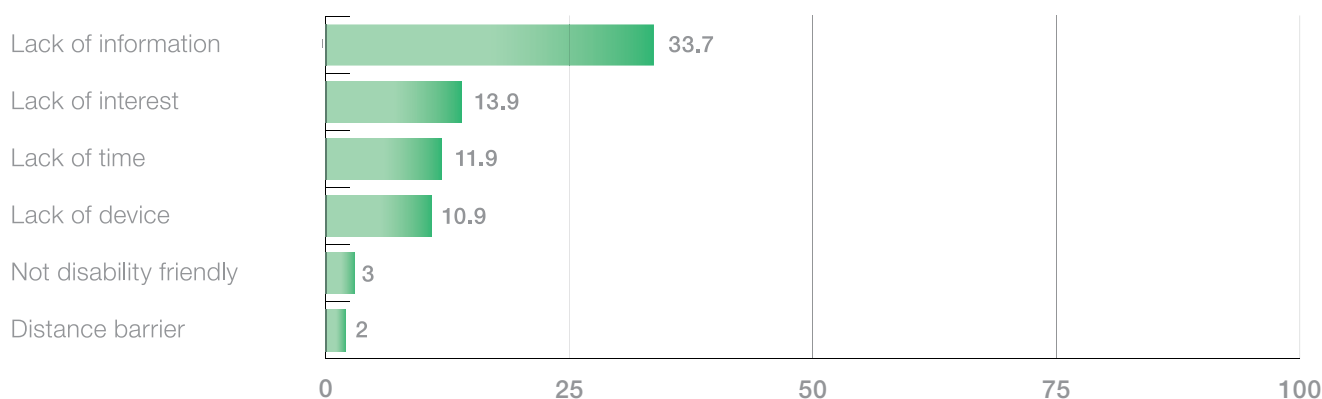


Cambodia: Participation
in Training Institutions
Share of respondents (%)



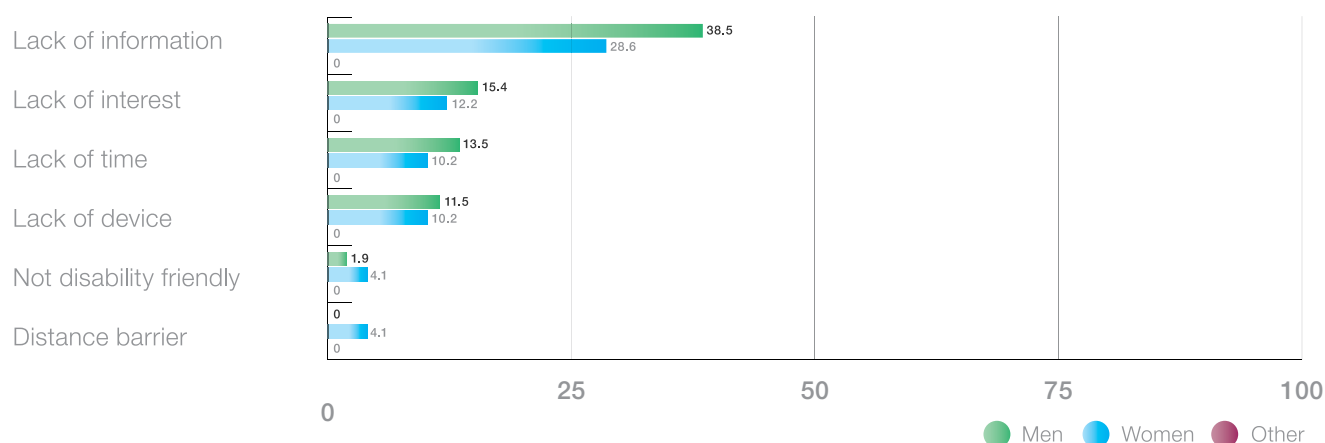
Cambodia: Challenges to Get Training

Share of respondents (%)



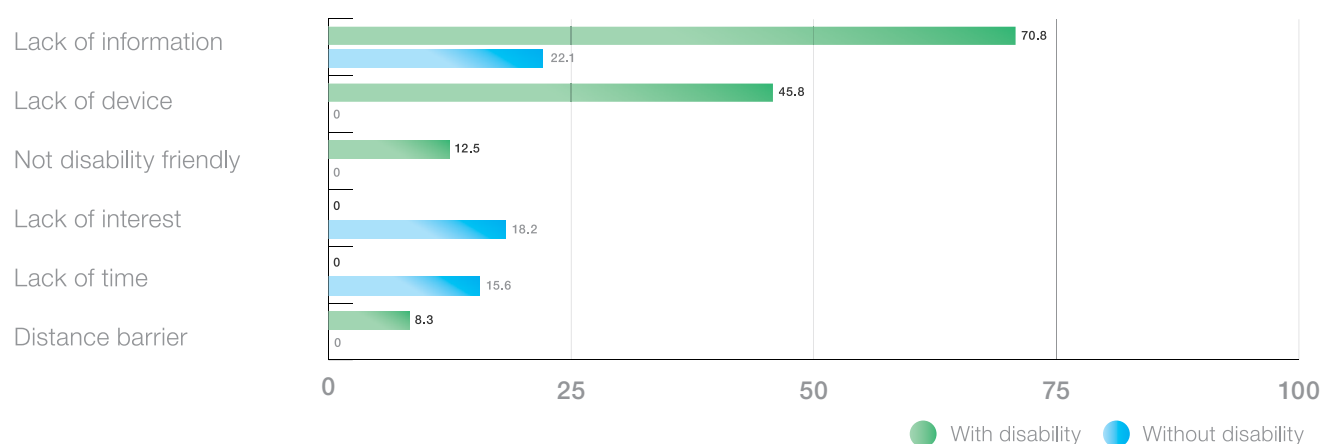
Cambodia: Challenges to Get Training

Share of respondents, by gender (%)



Cambodia: Challenges to Get Training

Share of respondents, by disability status (%)

**Figure 4.3. Learning Behaviour and Challenges in Cambodia**

Source: LOKA Group (2022)

When asked about the challenges to attend training, lack of information was cited as the top barrier (33.7 per cent). A considerable number of young people have also mentioned lack of interest (13.9 per cent), lack of time (11.9 per cent), and lack of devices as hindrances to training participation, while others alluded to issues such as lack of disability-friendly access (3.0 per cent) and distance barriers (2.0 per cent). Young men are more likely to face barriers in training participation than young women in Cambodia, with the training information gap being nearly 10 per cent higher in young men.

Meanwhile, Fig. 4.3 shows that more young PWDs face information barriers to training access compared to those without disability by nearly 50 per cent. Other barriers include not having a device for training (45.8 per cent) - a challenge not reported by non-PWD respondents - and not having a training facility close by (8.3 per cent). In addition to these barriers, qualitative data gleaned from discussions with young PWDs revealed that structural discrimination impoverished their families, who were then unable to provide them with adequate financial support in accessing the training needed.

Profession and Skilling

Cambodia: Job Aspirations

Share of respondents (%)

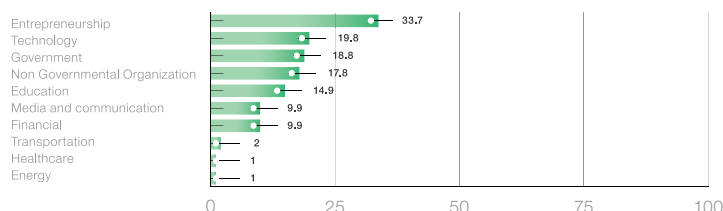


Figure 4.4. Job Aspirations in Cambodia

Source: LOKA Group (2022)

The top job aspiration among the Cambodian youth surveyed is entrepreneurship, with 1 out of 3 young people (33.7 per cent) reporting a desire to pursue this career path. Meanwhile, others seek future jobs in the technology (19.8 per cent), government (18.8 per cent), NGO (17.8 per cent), and education sectors (14.9 per cent). Nearly 10 per cent of young people wanted to pursue a career in the finance and media and communication industries (9.9 per cent), while only a few seek careers in the transportation, healthcare, and energy sectors (1 per cent).

In terms of skilling needs, 2 out of 3 young people in Cambodia are in need of further enhancing their cognitive skills (67.3 per cent). This reflects the need of private sector employers interviewed, as they regard

Cambodia: Upskilling and Reskilling

Share of respondents (%)

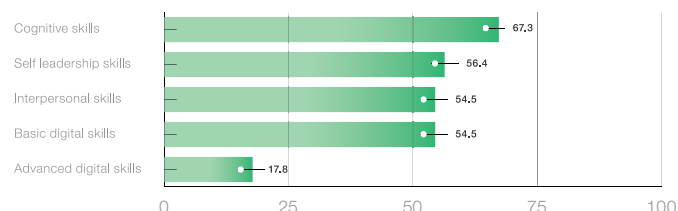


Figure 4.5. Skills to Upskill and Reskill in Cambodia

Source: LOKA Group (2022)

problem-solving skills as the most needed yet least equipped amongst the youth. Meanwhile, over half of young Cambodians feel there is a need to upskill their self-leadership (56.4 per cent) and interpersonal skills (54.5 per cent). Reskilling in basic digital skills is also needed by 54.5 per cent of the respondents, while only 17.8 per cent wanted to enhance their advanced digital skills.

05

Country Overview

Indonesia

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Indonesia

Overview

Indonesia is home to around 270 million people,¹⁰⁸ with youth aged 16 to 30 years old constituting 24 per cent of the total population.¹⁰⁹ However, youth unemployment in Indonesia is among the highest in the region. In 2020, at least 1 out of 5 young working-age Indonesians are unemployed,¹¹⁰ with the unemployment rate being almost 7 per cent higher than the global rate.¹¹¹ They are also often perceived as vulnerable groups suffering from low-quality jobs, low pay, less experience, and poor work environment.¹¹²

The situation is further worsened by the COVID-19 crisis. UNFPA Indonesia's Youth Advisory Panel

revealed that most Indonesian youths suffer from anxiety during the pandemic due to the fear of the situation not improving and an inability to socialise.¹¹³ The SMERU Research Institute reported that the pandemic caused 518,000 youths to be laid off, while around 1.5 million of the young workforce experienced a reduction in their working hours in 2020 due to lockdowns.¹¹⁴ Additionally, many had to work and study at the same time, thus leading to learning disruption.¹¹⁵

Employment Landscape

The World Bank explains that in Indonesia, the COVID-19 pandemic has delayed the transition to work of some 7 million young people who have recently finished university and secondary education.¹¹⁶ This has resulted in around 300,000 fewer youth entering the labour market compared to the previous year.

Despite these effects, the 2021 McKinsey and Company report found that labour demand will

increase in some sectors in light of the pandemic. These sectors include construction, manufacturing, education, healthcare, and retail and wholesale trade – albeit manufacturing and construction saw a steady decline in the first quarter of 2020.¹¹⁷ Furthermore, workers with specific digital skills and who possess at least a high school diploma will be more in demand.¹¹⁸ According to the SMERU Research Institute, technology literacy has become a prerequisite in order for the youth to compete in the pandemic

¹⁰⁸ World Bank. (2021). *Population total – Indonesia*, in <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=ID>

¹⁰⁹ Kompas. (2021). *Hadapi bonus demografi, indeks pembangunan pemuda Indonesia masih sangat rendah*, in <https://nasional.kompas.com/read/2020/10/26/17100961/hadapi-bonus-demografi-indeks-pembangunan-pemuda-indonesia-masih-sangat?page=all>

¹¹⁰ SMERU Research Institute. (2021). *Urgensi peningkatan daya saing tenaga kerja muda selama pandemi COVID-19*, in <https://smeru.or.id/id/content/urgensi-peningkatan-daya-saing-tenaga-kerja-muda-selama-pandemi-covid-19>

¹¹¹ *Ibid.*

¹¹² SMERU Research Institute (2021). *Urgensi Peningkatan Daya Saing Tenaga Kerja Muda Selama Pandemi COVID-19*. Retrieved at <https://smeru.or.id/id/content/urgensi-peningkatan-daya-saing-tenaga-kerja-muda-selama-pandemi-covid-19>

¹¹³ UNFPA. (2020). *Prioritizing youth needs in national COVID-19 response*, in <https://indonesia.unfpa.org/en/news/prioritizing-youth-needs-national-covid-19-response>

¹¹⁴ SMERU Research Institute. (2021). *Urgensi peningkatan daya saing tenaga kerja muda selama pandemi COVID-19*

¹¹⁵ World Bank. (2021). *Pathways to middle-class jobs in Indonesia*, in <https://documents1.worldbank.org/curated/en/254651624512296240/pdf/Overview.pdf>

¹¹⁶ *Ibid.*

¹¹⁷ SMERU (2020). *Employment situations of economic sectors impacted by the COVID-19 pandemic*.

and post-pandemic labour market. Statistics show that there was a steady increase in the proportion of young Indonesians equipping themselves with technological skills, and a total of 38 per cent were found to use technology in their work in 2020.¹¹⁹ Indonesian youth also account for the majority of social media users in the country,¹²⁰ yet digital literacy and skills acquisition remain to be a challenge.¹²¹

According to the National Central Bureau of Statistics or Badan Pusat Statistik (BPS), Indonesia's demographic bonus¹²² will reach its peak in 2037.¹²³ However, while estimates predict an increase in the share of the productive age population in Indonesia in 2030,¹²⁴ 57 per cent of today's workforce are only able to complete lower secondary education (nine years of basic education).¹²⁵ The prevalence of unemployment is higher for those who enrol in vocational schools, which predominantly teach technical in addition to academic skills¹²⁶ and where most vulnerable students study as they aim to immediately secure a job. However, according to the recent 2020 ILO Report on Global Youth Employment Outlook, vocational jobs are prone to automation, making the workforce more vulnerable in the post-pandemic labour market.¹²⁷

In addition, the gap in terms of access to education between the youth in rural and urban areas results in unequal opportunities for better employment. For

instance, only 6.3 per cent of youth in rural areas completed their tertiary education, compared to 12.6 per cent in urban areas. The disparity in socio-economic status also contributes to education gaps among youth. For instance, young people whose household expenditure is in the upper 20 per cent tend to complete both secondary and tertiary education than those in the lower 80 per cent.¹²⁸

As an effort to help college and vocational high school graduates obtain soft skills and knowledge in addition to the ones they obtained through formal education, the government launched Program Pemuda Bangun Negeri or Young People Building Nation Programme (PPBN) in 2021, a development programme that runs in five cities. It was launched based on the government's realisation during the pandemic that various industries require soft skills such as collaboration, teamwork, and adaptation. However, while the government saw an increasing demand for IT-related skills, there are no specific policies to help youth acquire these competencies, be it through skilling, reskilling, upskilling opportunities, or providing affirmative access for them through a jobs quota mechanism. Neither do policy responses exist to help more women or disabled young people in attending available courses, despite the high number of Indonesian youth participating in training activities held by national and local job training centres.

¹¹⁸ McKinsey and Company. (2021). *Ten ideas to unlock Indonesia's growth after COVID-19*, in <https://www.mckinsey.com/featured-insights/asia-pacific/ten-ideas-to-unlock-indonesias-growth-after-covid-19>

¹¹⁹ SMERU Research Institute. (2021). *Urgensi peningkatan daya saing tenaga kerja muda selama pandemi COVID-19*.

¹²⁰ Katadata. (2020). *Berapa usia mayoritas pengguna media sosial di Indonesia?*, in <https://databoks.katadata.co.id/datapublish/2020/11/23/berapa-usia-mayoritas-pengguna-media-sosial-di-indonesia>

¹²¹ UNICEF. (2021). *Strengthening digital learning across Indonesia: A study brief*, in <https://www.unicef.org/indonesia/media/10531/file/Strengthening%20Digital%20Learning%20across%20Indonesia:%20A%20Study%20Brief.pdf>

¹²² The demographic bonus or dividend refers to the accelerated economic growth that begins with changes in the age structure of a country's population as it transitions from high to low birth and death rates. See Gribble and Bremner (2012). *Achieving a demographic dividend*, Population Bulletin 67, 2. Washington DC: Population Reference Bureau.

¹²³ Kompas. (2021). *Indonesia hadapi bonus demografi pada 2037, Apa manfaatnya?*, in <https://money.kompas.com/read/2020/11/23/150602326/indonesia-hadapi-bonus-demografi-pada-2037-apa-manfaatnya>

¹²⁴ Center for Indonesian Policy Studies. (2021). *Addressing employability in Indonesia*, in https://britcham.or.id/wp-content/uploads/2021/08/180821_LATASHACIPS_Addressing-Employability-in-Indonesia-.pdf

¹²⁵ World Bank. (2021). *Pathways to middle-class jobs in Indonesia*.

¹²⁶ SMERU Research Institute. (2021). *Urgensi peningkatan daya saing tenaga kerja muda selama pandemi COVID-19*.

¹²⁷ ILO. (2020). *Global employment trends for youth 2020*, in https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_737648.pdf

¹²⁸ Konrad Adenauer Stiftung. (2021). *The future of work for the Asian youth, country profile: Indonesia*, in <https://www.kas.de/documents/287213/8314289/Indonesia+Country+Profile.pdf/db945ffb-4c35-031f-c1f8-c176581f402e?version=1.0&t=1608518633600>

Skills Demand

Along with the government's forecast of the demand for IT skills, LinkedIn reports that Indonesia is listed as one of the top locations for data analysis, specialised engineering, data content, digital marketing, public relations, e-commerce, business development and sales, customer service, education, and finance and insurance.¹²⁹ Similarly, WEF's Future of Jobs 2020 report also identified 10 emerging job roles in Indonesia: data analyst and scientist, big data specialist, AI and machine learning specialist, digital marketing and strategy specialist, renewable energy engineer, process automation specialist, internet of things specialist, digital transformation specialist, business services and administration manager, and business development professional.¹³⁰ The majority of in-demand and emerging jobs require high proficiency in digital, communications, and data management skills.

Supplementing these findings, interviews with private companies in Indonesia reveal that the ability to communicate in the digital space, which combines basic digital skills and interpersonal skills, is on top of the list of in-demand competencies. This is followed by time management (self-leadership), the ability to work under pressure, (self-leadership), and critical thinking (cognitive skills). Box 5.1 presents an excerpt representing employers' views on this need. Consistent with the skills needed by employers, survey results revealed the same trend among young people (Fig. 5.1). Nearly 2 out of 3 youths (64 per cent) felt the importance of self-leadership skills (e.g. entrepreneurship, time-management, self-motivation and initiative, trustworthiness, and ability to work under pressure) in acquiring jobs. This is followed by interpersonal skills (e.g. leadership, teamwork, team

'When the pandemic hit, all working methods had been shifted from offline to online, which required high dependency on an individual's communications skill in the online world. All cycles of workflows (end-to-end) are changed from offline to online methods: daily meetings, reporting, task delegating, consultation, etc., which leads to young people needing a high proficiency in communicating with their supervisors and subordinates remotely. Meanwhile, because of the pandemic and the rapid digital transformation processes, all workflows that are now integrated into the online system have become more expeditious, requiring an individual to perform their tasks intensely. If communication is not maintained, one could jeopardise other workflows within a company.'

— Indonesian Employers

Box 5.1. Employer Insights in Indonesia

Source: LOKA Group (2022)

management, social influence, and mentoring), although those who felt the usefulness of these skills in job acquisition is less than half of the share of respondents (42 per cent). Meanwhile, only around 1 out of 3 young people in Indonesia believe that basic digital skills (35 per cent), cognitive skills (33 per cent), and advanced digital skills (27 per cent) helped them secure jobs.

¹²⁹ LinkedIn. (2021). *Jobs on the rise in 2021*, in <https://business.linkedin.com/talent-solutions/resources/talent-acquisition/jobs-on-the-rise-sea#trends>

¹³⁰ WEF. (2020). *The Future of jobs report 2020*, in <https://www.weforum.org/reports/the-future-of-jobs-report-2020>

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

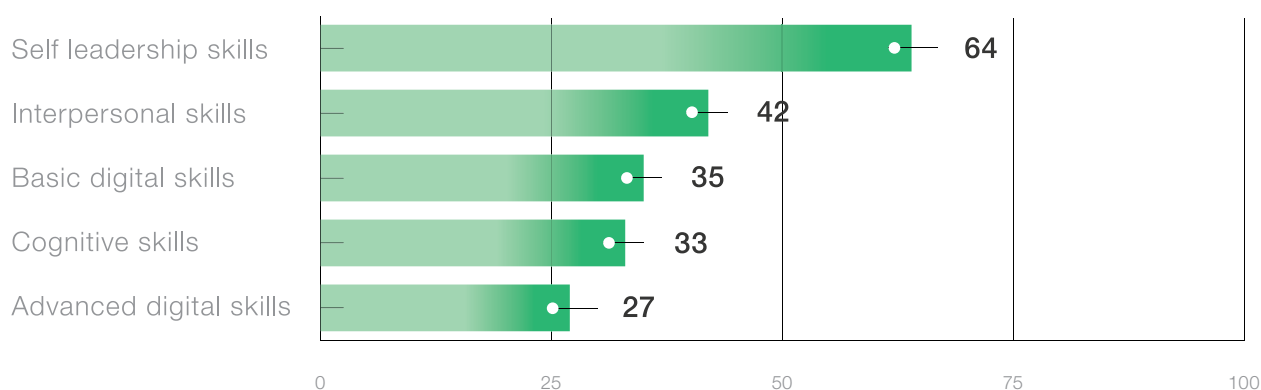


Figure 5.1. Skills Found to be Helpful in Finding a Job in Indonesia

Source: LOKA Group (2022)

Skills Supply

The study does not find an extreme mismatch between the supply and demand of skills according to young people. However, the digital skills supply is relatively lower than the supply of other skills (Fig. 5.2). In the country, 1 out of 4 young people (25 per cent) do not have advanced digital skills, and nearly 1 out of 2 have no to low mastery of advanced digital skills (48 per cent). Meanwhile, 32 per cent of young people have none to low basic digital skills. On the other hand, the majority of Indonesian youth have much higher levels of proficiency in other skill categories. Around 79 per cent of young people have moderate to high proficiency in self-leadership, followed by 78 per cent for interpersonal and 77 per cent for cognitive skills.

Mastery of Future Skills

Share of respondents (%)

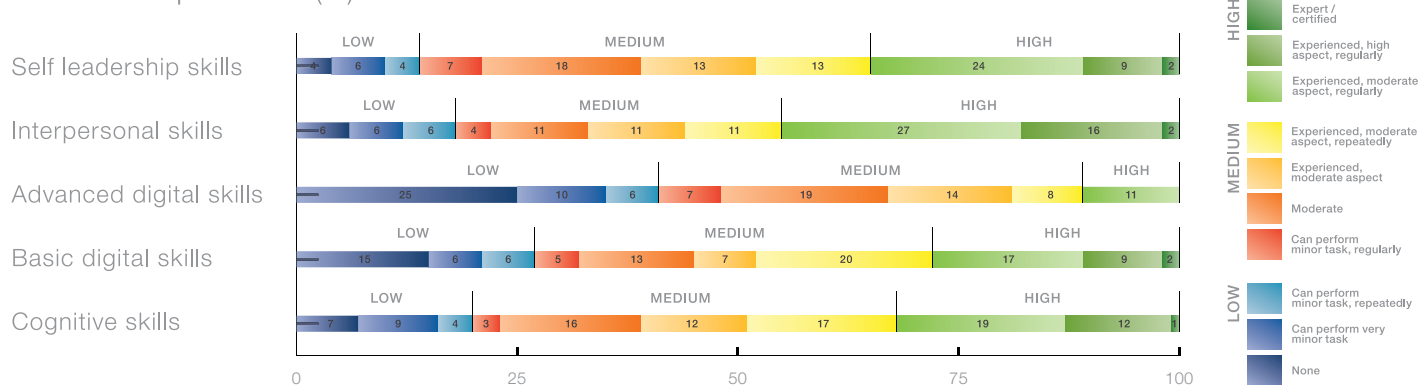


Figure 5.2. Mastery of Future Skills in Indonesia

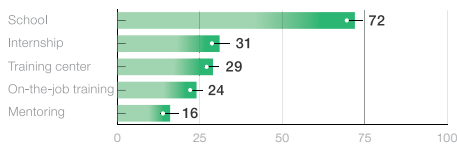
Source: LOKA Group (2022)

Learning Behaviour

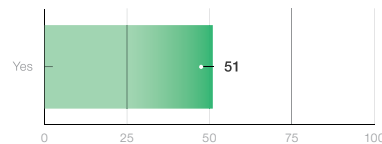
The study reveals that 72 per cent of Indonesian youth acquired their skills from formal education or skills (Fig. 5.3). Meanwhile, a smaller share of young people gained their skills from internships (31 per cent), training centres (29 per cent), on-the-job training (24 per cent), and mentorships (16 per cent). A little over half of youth in Indonesia have attended training activities (51 per cent), and more respondents have participated in government-sponsored training (62.7 per cent) than in privately organised courses (37.3 per cent).

Among those who had difficulty accessing training activities, many of the respondents admitted that they are financially incapable to attend training (14 per cent). Despite government-sponsored training being free, young people still need to spend on the logistics to support their participation (e.g. transportation, allowance, study materials, etc.). Furthermore, 12 per cent of young people cited distance as the second top barrier to attending training. Less than 10 per cent of youth cited lack of time (6 per cent), lack of parental consent (6 per cent), lack of interest (5 per cent), lack of disability-friendly training (3 per cent), and lack of supporting devices (3 per cent) as other barriers.

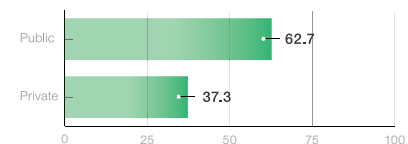
Indonesia: Means to Acquire Skills
Share of respondents (%)



Indonesia: Training Participation
Share of respondents (%)

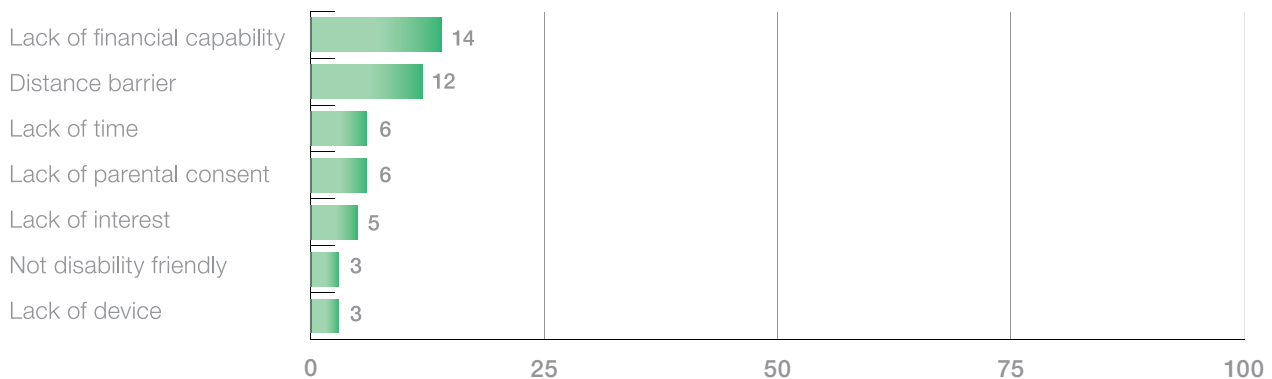


Indonesia: Participation in Training Institutions
Share of respondents (%)



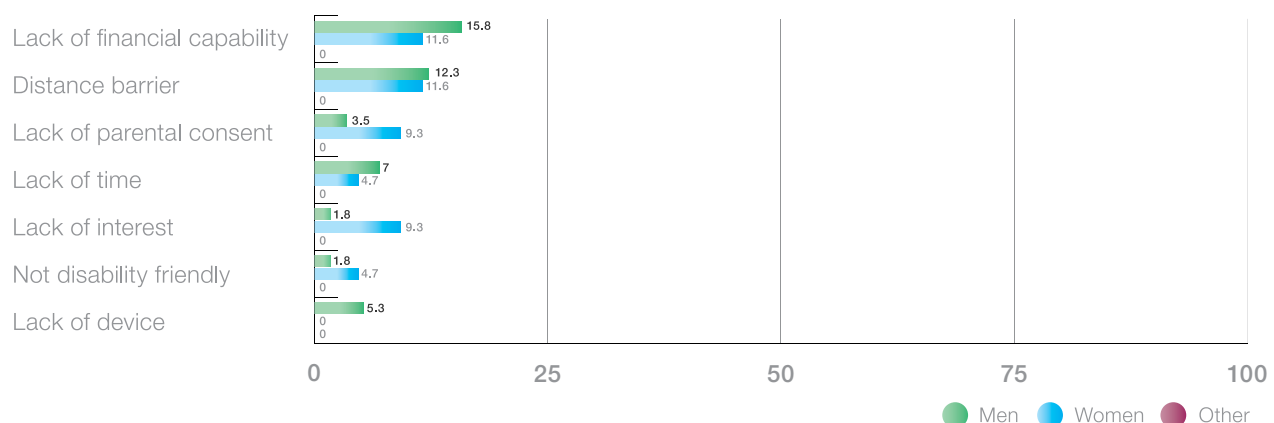
Indonesia: Challenges to Get Training

Share of respondents (%)



Indonesia: Challenges to Get Training

Share of respondents, by gender (%)



Indonesia: Challenges to Get Training

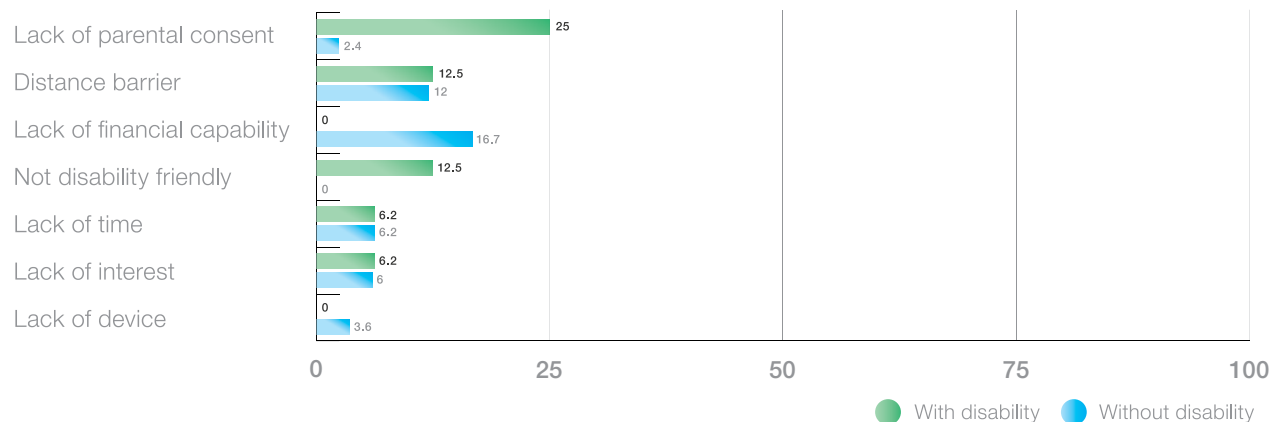


Figure 5.3. Learning Behaviour and Challenges in Indonesia

Source: LOKA Group (2022)

Socioeconomically disadvantaged youth also point to the difficulties of accessing government-funded skill development programmes, especially through the Pre-employment Card (Kartu Pra-Kerja) programme. According to the respondents, opportunities for learning are not hard to come by but the process of getting themselves enrolled in the system is challenging. A case study under this research found an unemployed Indonesian youth who registered for Batch 3 (August 2020) of the programme but was only successfully admitted in Batch 18 (August 2021). Additionally, the Pra-Kerja programme is heavily biased towards the unemployed in Java. Out of 5.6 million seat allocations, 4 million seats in Pra-Kerja were given to the unemployed residing in Java.

The study further revealed that young women generally experience more challenges in terms of getting parental consent to participate in training programmes compared to young men. Young women who expressed difficulty in getting their parents' consent were recorded at 9.3 per cent compared

to only 3.5 per cent of young men. In terms of interest, young women (9.3 per cent) seem to be less motivated to participate in training programmes than young men (1.8 per cent).

Youth with disabilities (Young PWDs) face more challenges in some areas than their non-disabled counterparts. Young PWDs are unable to describe their acquired skills and their skills or job aspirations. In most cases, they are unaware of their skills and the possibilities of integrating them into the local economy. They do not feel that there is a suitable platform that could help them identify their existing skills, aspired skills, and job aspirations. One out of four disabled youth do not get permission from their parents to attend training. This is much higher than non-disabled youth which was only recorded at 2.4 per cent. One out of eight young PWDs (12.5 per cent) also cited challenges in terms of the training not being disability friendly.

Professional Aspirations and Skilling Needs

As shown in Fig. 5.4, nearly 1 out of 2 young Indonesians (48 per cent) aspire to work in the government sector (48 per cent). Others want to become entrepreneurs (35 per cent) or work in the media and communication (29 per cent) and financial sectors (27 per cent). Meanwhile, a small share of youth chose technology (18 per cent), education (11 per cent), healthcare (8 per cent), transportation (4 per cent), NGOs (4 per cent), and energy (2 per cent) for their career prospects.

Indonesia: Job Aspirations
Share of respondents (%)

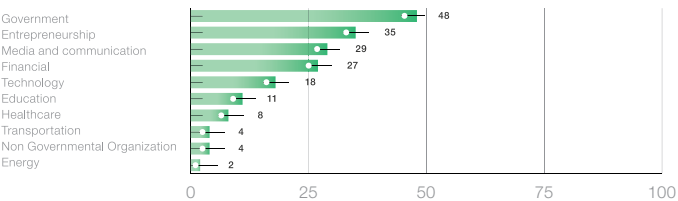


Figure 5.4. Job Aspirations in Indonesia
Source: LOKA Group (2022)

Indonesia: Upskilling and Reskilling
Share of respondents (%)

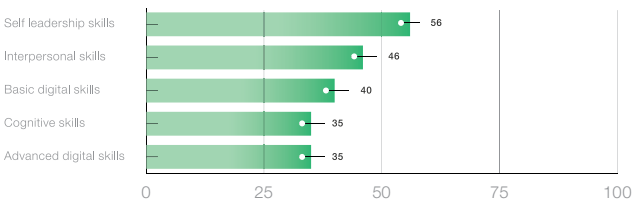


Figure 5.5. Skills to Upskill and Reskill in Indonesia
Source: LOKA Group (2022)

In terms of upskilling and reskilling of current competencies, young people still feel the need to pursue upskilling in self-leadership (56 per cent), interpersonal (46 per cent), and cognitive skills (35 per cent), despite being relatively proficient in these areas. The priorities for upskilling and reskilling coincide with those perceived to be helpful in securing jobs. Meanwhile, the need for upskilling of basic digital skills stood at 40 per cent, and despite the increasing demand for advanced digital skills in the job market, only 35 per cent of young people believe that reskilling of this competency is necessary.

06

Country Overview

Lao PDR

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Lao PDR

Overview

The only landlocked country in Southeast Asia bordered by Cambodia, China, and Myanmar, Lao PDR has a total population of approximately 7.28 million people.¹³¹ The country is experiencing a demographic transition with changing patterns of mortality, fertility, and growth rates. It has the opportunity to benefit from a demographic dividend as it enters a 20-year period marked by having the largest share of the working age population and fewer dependents.¹³²

Of the total population of Lao PDR aged five and over, more than 2.8 per cent, or over 160,000 people, live with a disability. The disability rate in urban areas is at 2.48 per cent,¹³³ which is 0.9 percentage points less than those in remote areas. The rate of people with disability (PWDs) also differs in rural areas with and without roads at 3.33 per cent and 2.86 per cent, respectively.

Employment Landscape

Employment in Lao PDR is heavily centred in the agriculture sector, contributing 61.4 per cent of the total employment in 2019 compared to 25.6 per cent in the services and 13 per cent in the industry sectors.¹³⁴ The same trend can be observed among the country's youth workforce, where around 75 per cent are employed in agriculture compared to 9 per cent in services, 7 per cent in commerce, and 5.3 per cent in manufacturing. A smaller percentage (3.7 per cent) contributes in other types of sectors.¹³⁵

Meanwhile, about 80 per cent of workers in the country are engaged in informal employment in enterprises or households, with an overrepresentation of women.¹³⁶

As a country with one of the youngest populations in the region, close to 60 per cent of the population is estimated to be aged less than 25 years as of 2020.¹³⁷ In 2019, the youth unemployment rate in the country for those aged 15 – 24 was 2.3 per cent, with young

¹³¹ World Bank. (2022). *Population, total – Lao PDR*, in <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=LA>

¹³² UNFPA. (2020). *Window of opportunity for realizing a demographic dividend*, in https://lao.unfpa.org/sites/default/files/pub-pdf/dd_brief_eng.pdf

¹³³ UNFPA. (2020). *Towards better inclusion of people with disability rights in Lao PDR*, in <https://lao.unfpa.org/en/news/towards-better-inclusion-people-disability-rights-lao-pdr>

¹³⁴ Statista. (2022). *Employment by economic sector in Laos 2019*, in <https://www.statista.com/statistics/804983/employment-by-economic-sector-in-laos/>

¹³⁵ Understanding Children's Work (UCW) Programme. (2014). *Understanding children's work and youth employment outcomes in Laos*, in https://resource-centre-uploads.s3.amazonaws.com/uploads/laos_summary_inter-agency_report_08jan14.pdf

¹³⁶ UNFPA. (2021). *Lao youth and adolescent development strategy 2021-2030*, in https://lao.unfpa.org/sites/default/files/pub-pdf/laoyouth_and_adolescent_development_strategy_2021-2030_eng_26nov21-final.pdf

¹³⁷ UNDP. (2020). *Enhancing social and economic opportunities for youth in the Lao PDR*, in <https://www.la.undp.org/content/laopdr/en/home/projects/enhancing-social-and-economic-opportunities-for-youth-in-the-lao.html>

men's unemployment being slightly higher than that of young women by 0.2 percentage points.¹³⁸ The COVID-19 pandemic hit the country's economy hard, bringing employment instability particularly in the service and manufacturing industries.¹³⁹ As a result, the youth unemployment rate went higher by 0.3 per cent, reaching 2.6 per cent.¹⁴⁰ The pandemic also negatively affected young people working in micro, small, and medium-sized enterprises (MSMEs) as well as low-tech businesses. Given MSME's involvement with hard-hit sectors like tourism,¹⁴¹ most workers in the area were increasingly exposed to the risk of job loss.¹⁴²

For Lao PDR, challenges remain for vulnerable communities – including young people, women, and PWDs – to fulfil the emerging demands for medium- and high-skilled positions generated by the ASEAN Economic Community. There remains a mismatch between the market needs and current skills of youth, and equipping young people with skills would be equivalent to reaping the country's demographic dividend. Similar to Cambodia, the barriers to employment for young women in Lao PDR stem from limited access to advanced education degrees and prevalent occupational gender segregation. Despite 63.9 per cent of young women completing secondary education, only 15.3 per cent enrolled themselves in tertiary education.¹⁴³ This is not surprising since women are usually expected to fill in roles in low-end

occupations, despite women and men representing an equal share of the working population. More than 60 per cent of women work in the services sector, whereas men are largely employed in formal sectors. This landscape puts women workers at risk considering that they have limited access to credits and inadequate social protection. In addition, women spend 2.6 hours of housework each day, compared to men whose housework only accounts for 0.6 hours per day.¹⁴⁴ Beyond existing gender gaps, the young workforce also faces a wide range of barriers such as lack of career counselling, lack of access to vocational training, lack of teachers, lack of information, the geographical proximity of schools, lack of access to credits, and lack of connections to access employment.¹⁴⁵

¹³⁸ ILOSTAT. January 2022.

¹³⁹ UNDP. (2021). *Youth Unemployment Issues in Lao PDR*, in <https://www.undp.org/sites/g/files/zskgke326/files/migration/la/Youth-survey-report-UNDP.pdf>

¹⁴⁰ ILOSTAT. January 2022.

¹⁴¹ RIN Online Workshop. (2020). *The Impact of COVID-19 on the Lao economy and its recovery post-COVID*, in https://d-arch.ide.go.jp/RIN/common/pdf/2020-09_ws-abstract_3-2_latdavanh.pdf

¹⁴² UNIDO. (n.d.) *Impact assessment of COVID-19 on Lao PDR's manufacturing firms*, in https://www.unido.org/sites/default/files/files/2021-03/UNIDO%20COVID19%20Assessment_LAO%20PDR_FINAL.pdf

¹⁴³ Plan International. (2021). *The 2021 Asia-Pacific girls report: Voice, choice and power*.

¹⁴⁴ GGGI. (n.d.). *Gender inclusive green growth in Lao PDR*, in <https://gggi.org/site/assets/uploads/2018/10/Gender-and-Green-Growth-Policy-Brief-Lao-PDR.pdf>

¹⁴⁵ UNFPA Lao PDR. (2014). *Adolescent and youth situation analysis: Lao People's Democratic Republic*, in https://lao.unfpa.org/sites/default/files/pub-pdf/Final_Eng_AYSA%20Report.pdf

Skills Demand

While the country continues to witness a rise in the services and industry sectors,¹⁴⁶ 2021 statistics show that the country's economy remains largely agrarian, with a large concentration of employment in this sector.¹⁴⁷ Sectors such as digital connectivity, transportation, MSMEs, renewable energy, and high-value agricultural activities could potentially instigate job creation and employment, thus diversifying the Lao economy.¹⁴⁸ However, modernising its industry by leveraging the opportunities that come with the Fourth Industrial Revolution (4IR) remains a challenge for the country.¹⁴⁹

While the country prepares for its future employment landscape, some industries have already started to seek young people to fill high-skilled professional positions that require proficiency in specific skills. The qualitative data gathered from discussions with employers in Lao PDR's formal sectors reveal a rise in demand for interpersonal skills (specifically communication and social influence) and basic digital

skills, coupled with characteristics that make for a strong work ethic such as being responsible, flexible, and adaptive.

Interestingly, it was found that self-leadership tops other skills in terms of its helpfulness in landing a job among young people in Lao PDR. As shown in Fig. 6.1, more than 2 out of 3 young people (71.2 per cent) found self-leadership skills useful in acquiring a job, followed by basic digital skills (67.6 per cent). Meanwhile, interpersonal skills (57.7 per cent) only come after cognitive skills (66.7 per cent). The interviewed youth regarded advanced digital skills (44.4 per cent) as the least useful. Our survey findings align with the perception of private sector employers regarding the value of teamwork and communication skills over digital skills. According to them, mastering these skills first would guarantee performance and inter-departmental cooperation, regardless of whether the work takes place online or offline.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

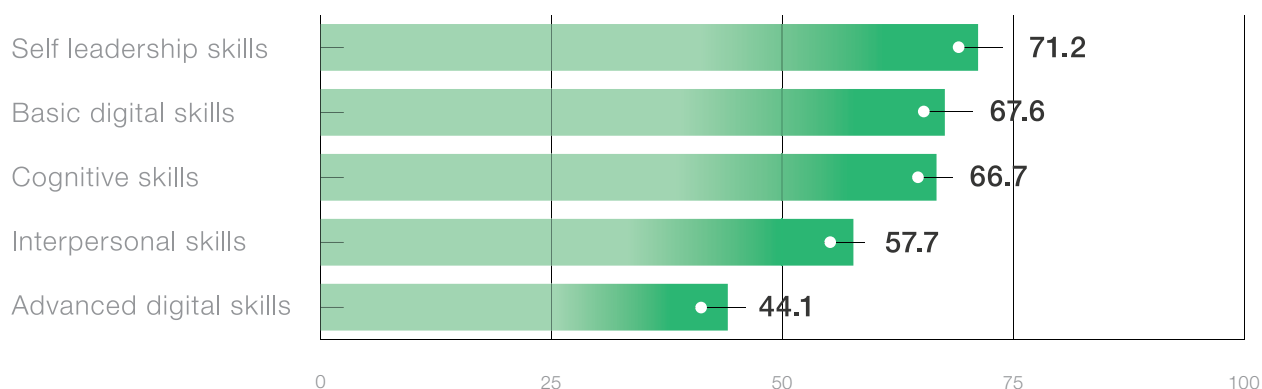


Figure 6.1. Skills Found to be Helpful in Finding a Job in Lao PDR

Source: LOKA Group (2022)

¹⁴⁶ World Bank. (2016). *The labour impact of Lao export growth*, in <https://openknowledge.worldbank.org/bitstream/handle/10986/24020/The0labour0impact0of0Lao0export0growth.pdf;sequence=1>

¹⁴⁷ UNCTAD. (2020). *Vulnerability profile of Lao PDR*, in <https://www.un.org/development/desa/dpad/wp-content/uploads/sites/45/CDP-PL-2021-4B-VP.pdf>

¹⁴⁸ CSIS. (2021). *Opportunities for US developmentCooperation in Laos*, in <https://www.csis.org/analysis/opportunities-us-development-cooperation-laos>

¹⁴⁹ ASEAN Access. (n.d.) *Lao People's Democratic Republic (Lao PDR)*, in https://aseanaccess.com/images/pdf/AW_Country-Profile-Lao.pdf

‘As we talk about the pandemic and performing job duties, I think of one thing: COVID-19 accelerating the use of digital technology. We now find it more useful in performing our daily work. For instance, we shifted from the conventional phone call or face-to-face discussion to online meetings. Sure it takes skills to do it, but we are no longer bound by time and space. In addition, interpersonal skills, curiosity, and confidence are equally important. Even though they do not know anything about the job that they are applying for, such creative qualities would help the person to stand out. One more important thing is the ability to be open-minded as the world keeps changing.’
— Employer in Lao PDR

Box 6.1. Employer Insights in Lao PDR

Source: LOKA Group (2022)

Skills Supply

As Fig. 6.2 shows, almost 80 per cent of the respondents have no to low proficiency in advanced digital skills, and nearly 1 out of 4 young people are not equipped with any advanced digital skills (25.2 per cent), while over half of the respondents (55 per cent) have no to low mastery of basic digital skills. Meanwhile, a larger proportion of youth report having experienced or expert level proficiency in cognitive (55.9 per cent) and self-leadership skills (53.1 per cent). This finding corresponds with the youth respondents' views on the increased importance – and hence mastery – of self-leadership skills such as emotional stability and adaptability during the pandemic. Meanwhile, about 1 out of 3 Laotian respondents report having moderate proficiency in interpersonal (36 per cent), self-leadership (34.2 per cent), and cognitive skills (29.7 per cent).

Mastery of Future Skills

Share of respondents (%)

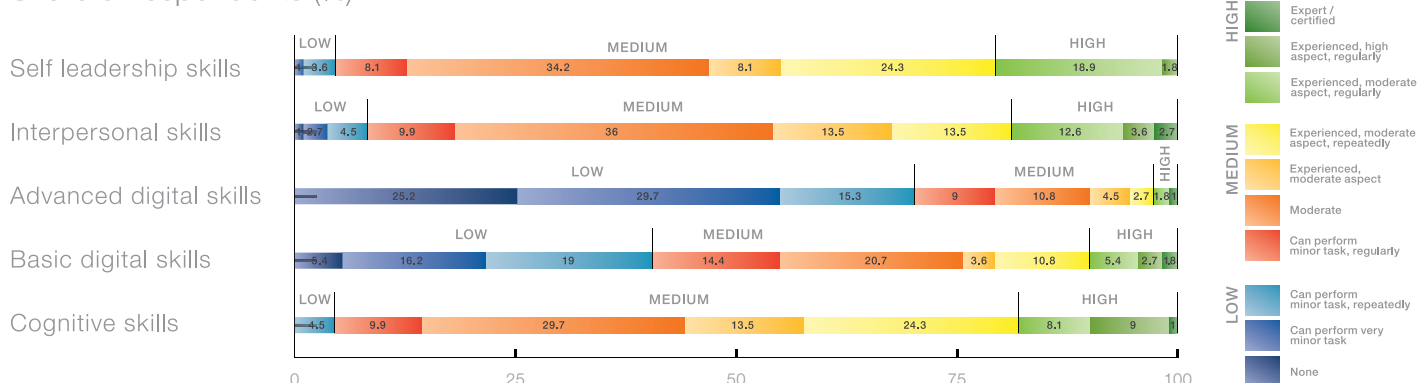


Figure 6.2. Mastery of Future Skills in Lao PDR

Source: LOKA Group (2022)

‘From my own experiences, technical skills can be acquired and mastered from school, online courses, and academic skills. However, interpersonal skills need to be built in a longer time and through complex processes. It needs training, organising projects, and exposure to the right network. Nowadays, youth have established many associations born from youth programs such as the Asian Law Student Association and Young Southeast Asian Leaders Initiative. Young people like to network and sharpen skills in cognitive, self-leadership, and interpersonal skills.’

— Youth respondent from Lao PDR

Box 6.2. Youth Insights in Lao PDR

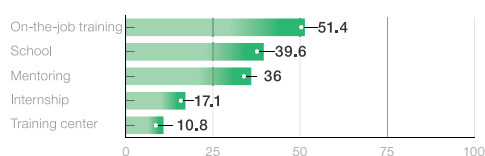
Source: LOKA Group (2022)

Learning Behaviour

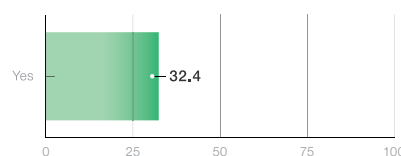
More young people in Lao PDR were able to develop their skills mainly through work experiences instead of through formal education. As depicted in Fig. 6.3, slightly over half of the respondents gained competences through on-the-job training (51.4 per cent), while school-based skilling only comes in second (39.6 per cent). More than 1 out of 3 youths were able to benefit from mentoring (36 per cent), while a smaller proportion of the respondents gained skills from internships (17.1 per cent) and attending training centres (10.8 per cent).

Training participation in Lao PDR is relatively low, with only around 1 out of 3 young people having attended training (32.4 per cent). However, the distribution of training provision between public and private entities is nearly equal, whereby 66.7 per cent were able to participate in government-backed programmes and 63.9 per cent attended privately-organised training.

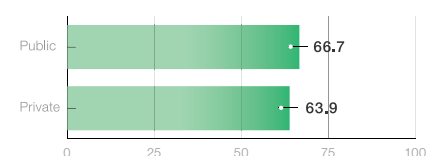
Lao PDR:
Means to Acquire Skills
Share of respondents (%)



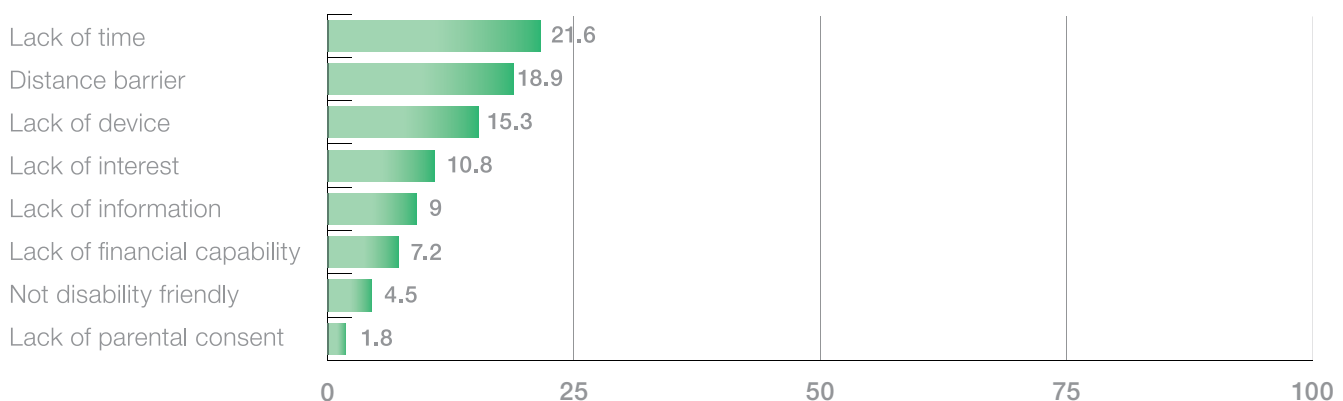
Lao PDR:
Training Participation
Share of respondents (%)



Lao PDR: Participation
in Training Institutions
Share of respondents (%)

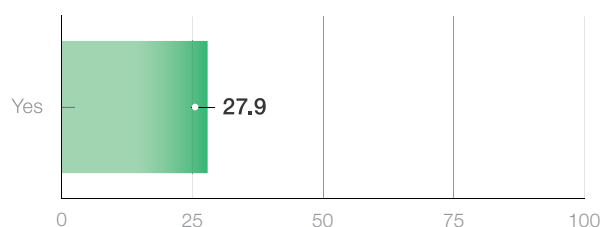


Lao PDR: Challenges to Get Training



Lao PDR: Moving Out to Take Training

Share of respondents (%)



Lao PDR: Challenges to Get Training

Share of respondents, by gender (%)

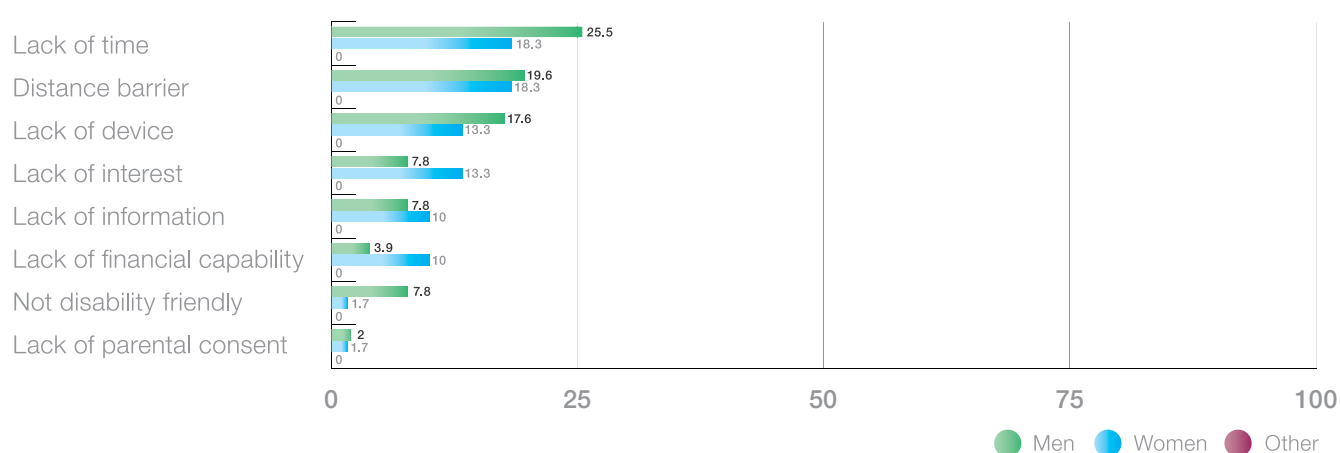


Figure 6.3. Learning Behaviour and Challenges in Lao PDR

Source: LOKA Group (2022)

As shown in Figure 6.3, lack of time precedes other challenges to getting training in Laos (21.6 per cent), followed by proximity issues (18.9 per cent), lack of devices (15.3 per cent), and lack of interest (10.8 per cent). In Lao PDR, over 1 out of 4 young people had to move out of their cities of origin to participate in training activities. In terms of gender differences, the study found that while lack of time and disability-friendly materials tend to affect men, women are more likely to report financial barriers by 6.1 per cent compared to their male counterparts.

Professional Aspirations and Skilling Needs

Entrepreneurship ranks first among young people’s job aspirations in Lao PDR (28.8 per cent). Others seek roles in the NGO (18.9 per cent), technology (16.2 per cent), media and communication (14.4 per cent), government (14.4 per cent), education (13.5 per cent), and financial (10.8 per cent) sectors. A smaller percentage desire to get jobs in healthcare (5.4 per cent), transportation (4.5 per cent), and energy (2.7 per cent).

Lao PDR: Job Aspirations
Share of respondents (%)

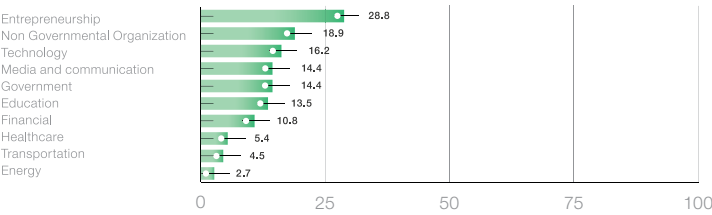


Figure 6.4. Job Aspirations in Lao PDR

Source: LOKA Group (2022)

Lao PDR: Upskilling and Reskilling
Share of respondents (%)

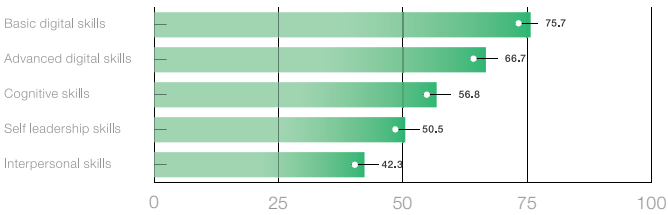


Figure 6.5. Skills to Upskill and Reskill in Lao PDR

Source: LOKA Group (2022)

Overall, young people in Lao PDR regard digital skills as needing the most improvement, including basic (75.5 per cent) and advanced digital skills (66.7 per cent). Over half of the respondents also perceive a need to upskill their cognitive (56.8 per cent) and self-leadership skills (50.5 per cent). Meanwhile, less than half (42.3 per cent) alluded to the need to improve their interpersonal skills.

07

Country Overview

Malaysia

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Malaysia

Overview

Malaysia is a multi-ethnic and religiously diverse country of around 32.7 million people, 77.3 per cent of whom reside in urban areas.¹⁵⁰ In 2019, there were 21.82 million adults in Malaysia, making up 68.2 per cent of the total population.¹⁵¹ The number of young people aged 15 to 24 is estimated at 5.5 million, or 17 per cent of the total population, and is expected to grow at an annual rate of 1.89 per cent.¹⁵² Meanwhile, more than 7 per cent are above the age of 65.¹⁵³ More than half of Malaysians are men, while women comprise 48.6 per cent of the population. Currently, 11.1 per cent of adults and 4.7 per cent of children in Malaysia live with disabilities.¹⁵⁴

As the pandemic hit the country, data suggests that employment declined most markedly for young workers and disproportionately affected those in low-income situations. The youth unemployment rate in Malaysia has been at double-digit figures since 2016, exceeding the country's unemployment rate of 4.8 per cent. However, it surged to 12.0 per cent in 2020 during the pandemic. Rural youth were also found to be more negatively affected compared to those in urban areas.¹⁵⁵ Overall, research evidence suggests that the global pandemic has caused a range of challenges for young workers, including job loss, a decrease in income, and mental health issues.

Employment Landscape

Malaysia's labour market is unable to generate medium- and high-skilled jobs to match the number of graduates, thereby causing stagnating wages and forcing workers to occupy low-income jobs – especially the youth.¹⁵⁶ The COVID-19 crisis has aggravated the situation, as jobs were lost and income was reduced due to the enforcement of movement restrictions. A drop in labour demand is marked by recruitment cutbacks, decreased training funding, and reduced staff intake via 'last-in-first-out

policies'.¹⁵⁷ In 2020, there were over 200,000 new graduates who have not obtained any jobs.¹⁵⁸ Most graduates used an education loan to pursue their studies with the expectation of being able to repay it upon starting a career. By being jobless, they face the risk of non-payment, which negatively impacts their families and livelihood due to financial instability.

The pandemic's effects on youth employment in Malaysia have been shown to vary across different

¹⁵⁰ UNFPA. (2022). *United Nations Population Fund: Country programme document for Malaysia*, in https://www.unfpa.org/sites/default/files/board-documents/main-document/ENG%20-%20DP.FPA_CPD_MYS_1%20-%20Malaysia%20CPD%20-%202022%20FRS%20-%20FINAL%20-%201Dec21.pdf

¹⁵¹ Statista. (2019). *Number of adults in Malaysia 2010-2019*, in <https://www.statista.com/statistics/667521/number-of-adults-in-malaysia/>

¹⁵² Knoema. (2021). *Malaysia – total population aged 15-24 years*, in <https://knoema.com/atlas/Malaysia/topics/Demographics/Age/Population-aged-15-24-years>

¹⁵³ World Bank. (2022). *Population ages 65 and above*, in <https://data.worldbank.org/indicator/SP.POP.65UP.TO.ZS?locations=MY>

¹⁵⁴ UNFPA. (2022). *United Nations Population Fund: Country programme document for Malaysia*.

¹⁵⁵ REFSA. (2020). *The impact of COVID-19 on the youth in Malaysia: A survey report*, in <https://refsa.org/wp-content/uploads/2021/01/Youth-Survey-Report-REFSA-Brief-Issue-12.pdf>

¹⁵⁶ The Malaysian Reserve. (2020). *The economic reality for Malaysia's youth*, in https://themalaysianreserve.com/2020/02/18/the-economic-reality-for-malysias-youth/?__cf_chl_jschl_tk__=uYa8scYiaNjYZ4jWYMds6R2g3h8SIUI3CY.NHs1B_sk-1642652101-0-gaNycGzNDSU

¹⁵⁷ Khazanah Research Institute. (2021). *Ensuring youth and graduate employability in an uncertain labour market*, in http://www.krinstute.org/assets/contentMS/img/template/editor/20210708_VIEWS_Youth%20and%20Grads_MAR_DF%20v2.pdf

¹⁵⁸ The Strait Times. (2021) *Effect of graduate unemployment on nation's growth*, in <https://www.nst.com.my/opinion/letters/2021/12/751004/effect-graduate-unemployment-nations-growth>

sectors. A decline in youth employment was observed in agriculture, craft, machine operation, and elementary occupations in the 2020 pandemic year. In contrast, there was a slight increase in employment in sectors such as service and sales work, which also happen to have the biggest share of employed youth pre-pandemic.¹⁵⁹ A November 2021 release by the Department of Statistics Malaysia¹⁶⁰ showed a similar upward trend albeit in a wider range of sectors, including wholesale and retail trade, food and beverage service, transport and storage, manufacturing, and construction. Meanwhile, employment in agriculture, as well as mining and quarrying sectors were reduced.¹⁶¹

Meanwhile, the COVID-19 crisis has also exacerbated the challenges of disadvantaged groups in Malaysia. For instance, people with disability (PWDs) may lack the privilege of finding alternative employment in the gig economy, unlike their non-PWD peers. The Malaysian government, despite enforcing the 1 per cent quota for civil service employment through circulars in 2008 to encourage the hiring of PWDs, the total share of civil service employees with disabilities in 2020 remained low at 0.3 per cent.¹⁶² PWDs have also traditionally faced discriminatory practices in the workplace, such as receiving salaries below the minimum wage and being told to be grateful for having access to a job despite their disability.¹⁶³

To alleviate the unemployment trend post-COVID-19, a number of government packages were introduced to relieve economic distress, retain existing jobs, and stimulate new employment. An example of these initiatives is the Pejana stimulus package under the Ministry of Higher Education (MOHE), which implemented the RM 100 million Career Advancing Programme (PENJANA KPT-CAP) to reduce unemployment among graduates. Under this scheme, participants are equipped with job competencies and skills as well as prepare them for self-employment through its Place and Train, Entrepreneurship and Gig Economy sub-programmes.¹⁶⁴

¹⁵⁹ ISEAS. (2021). *The COVID-19 recession: Rough times for young Malaysians*, in https://www.iseas.edu.sg/wp-content/uploads/2021/08/ISEAS_Perspective_2021_116.pdf

¹⁶⁰ Government of Malaysia. (2021). *Key statistics of labour force in Malaysia, November 2021*, in https://www.dosm.gov.my/v1/index.php?r=column/cthemByCat&cat=124&bul_id=R1hRY2d1aTFBZzY4ZExudStRMjgxZz09&menu_id=Tm8zcnRjdVRNWWlpWjRlbmtlaDk1UT09

¹⁶¹ *Ibid.*

¹⁶² The Malaysian Reserve. (2021). *People with disabilities and jobs during a pandemic*, in https://themalaysianreserve.com/2021/04/30/people-with-disabilities-and-jobs-during-a-pandemic/?__cf_chl_jschl_tk__=DdLkTOBai7t7VxfKj6d8EbjR7NjiCP_EwmFSI3u1dhU-1643116901-0-gaNycGzNCOU

¹⁶³ Harakah Daily. (2021). *People with disabilities and jobs during a pandemic*, in <https://harakahdaily.net/index.php/2021/04/30/people-with-disabilities-and-jobs-during-a-pandemic/>

¹⁶⁴ Place and Train is geared towards PENJANA KPT-CAP participants, providing industry-sponsored competency training. Some participants would be able to have an opportunity to secure a job placement in the participating industries upon completion of the programme. Meanwhile, the Entrepreneurship programme provides insights on the setting up and securing funding for a company. Lastly, the Gig Economy programme aims to enable the participants to engage in income-generating activities through freelancing. See Malaymail. (2020). *Ride the wave of career advancement with Penjana KPT-CAP*, in <https://www.malaymail.com/news/what-you-think/2020/09/24/ride-the-wave-of-career-advancement-with-penjana-kpt-cap-noraini-binti-ahma/1906266>

Skills Demand

LinkedIn's 2020 Emerging Jobs Report identified the top 10 emerging jobs in Malaysia, which include data scientist, customer success specialist, building information modelling (BIM) specialist, full stack engineer, data engineer, cyber security specialist, digital marketing specialist, environmental officer, DevOps engineer, and community manager.¹⁶⁵ The nature of these fast-growing roles allude to the relevance of digital skills: 8 out of the 10 jobs require expert-level digital proficiency, while basic digital skills are essential for all of them. Similarly, the World Economic Forum's (WEF) Future of Jobs 2020 Report observed that the five top-ranking emerging jobs in Malaysia require basic or advanced digital skills.¹⁶⁶

Despite the increasing relevance of digital skills in Malaysia's job market, interviews with private companies and TVET centres found that communication skill is a top priority, especially during the pandemic. Work-from-home (WFH) arrangements as a result of the Movement Control Order (MCO) restrictions in Malaysia highlights the importance of this skill, especially that regular communication and coordination within and between departments in a remote work environment is necessary for job performance. This is particularly relevant as employers place trust in their workers to perform with minimum supervision. The skill is also helpful for supervisors to keep track of their employees' work irrespective of the work location. However, TVET

institutions also regard digital skills, including data analysis and digital literacy, as increasingly significant to support WFH. Overall, employers view the importance of both soft and digital skills to perform in the workplace, as depicted in Box 7.1.

'If you know how to engage and interact with people using digital tools, this can improve one's Key Performance Indicator (KPI).'
— Malaysian Employer

Box 7.1. Employer Insights in Malaysia

Source: LOKA Group (2022)

In line with the skills demanded from the private sector in Malaysia, it was also found that interpersonal skills (75.8 per cent) and self-leadership skills (68.6 per cent) have helped around two-thirds of young Malaysians in securing job positions (Fig. 7.1). However, less than half of those surveyed believe that cognitive (48.4 per cent) and basic digital skills (40.5 per cent) were useful, while less than a third felt that advanced digital skills (e.g. web development, UI, UX, programming, coding, product development, data science, and data analysis) were important in acquiring jobs.

¹⁶⁵ LinkedIn. (2020). *Emerging Jobs Report Malaysia*, in https://business.linkedin.com/content/dam/me/business/en-us/talent-solutions/emerging-jobs-report/LinkedIn_EJR_MY_final.pdf

¹⁶⁶ WEF. (2020). *The future of jobs report 2020*.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

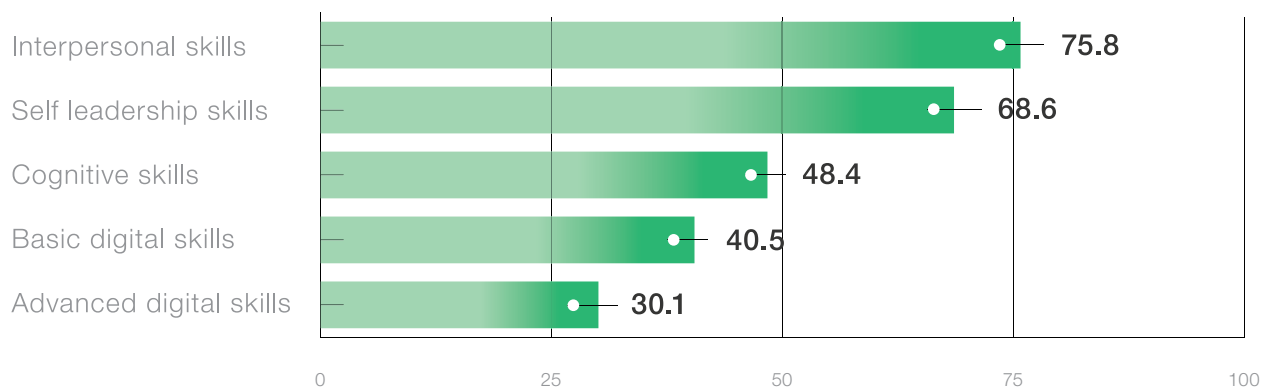


Figure 7.1. Skills Found to be Helpful in Finding a Job in Malaysia

Source: LOKA Group (2022)

Skills Supply

Evidence from the study suggests potential skills mismatch between those required by the emerging jobs in Malaysia and the youth's current skill level. As shown in Fig. 7.2, around 2 out of 3 young people have none to low advanced digital skills (68.6 per cent), while the same is true for basic digital skills in nearly half of the respondents (48.3 per cent).

Mastery of Future Skills

Share of respondents (%)

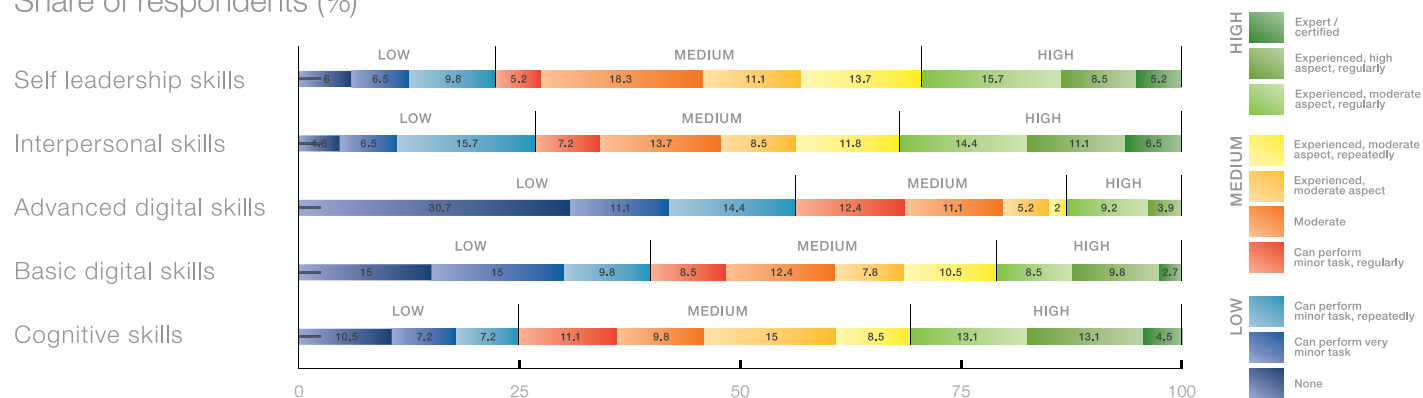


Figure 7.2. Mastery of Future Skills in Malaysia

Source: LOKA Group (2022)

Meanwhile, more than 2 out of 3 young people in Malaysia are equipped with self-leadership skills at a moderate to expert level (72.5 per cent). This is followed by interpersonal skills (66 per cent) and cognitive skills (64 per cent). Based on the qualitative data gathered from FGDs, one of the reasons for Malaysian youth's proficiency in self-leadership skills is due to the notion that they enable workers to be agile, dynamic, and flexible. As they become better

equipped at tasks like managing a team and leading by example, employees with these skills are able to earn the trust of their colleagues and supervisors, thereby allowing them to take on more responsibility at work. Employers also appear to value such skills not only because of the reduced need to supervise their employees but also since they regard these skills as increasingly important to thrive in the shift towards the digital setting caused by the COVID-19 outbreak.

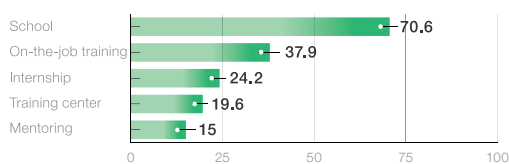
Learning Behaviour

As Fig. 7.3 shows, the majority of young people in Malaysia acquired their skills from school (70.6 per cent), although more than half of the respondents have also participated in some form of non-formal training to either gain skills, upskill, or reskill (60.8 per cent). Among those who attended training, 2 out of 3 participated in publicly organised ones (68.8 per cent) while 46.2 per cent attended training programmes by private providers. Other routes through which young Malaysians gained skills are on-the-job training (37.9 per cent) and internships (24.2 per cent). Meanwhile, fewer respondents are able to do so by attending training centres (19.6 per cent) and mentoring (15 per cent).

Lack of information is identified as the most common barrier to training among Malaysian youth (17 per cent), followed by lack of interest (15 per cent), inadequate financial resources (11.1 per cent), and issues related to proximity (7.6 per cent). For instance, nearly 1 out of 4 young Malaysians (22.9 per cent) had to move away from their cities of origin to receive adequate training.¹⁶⁷

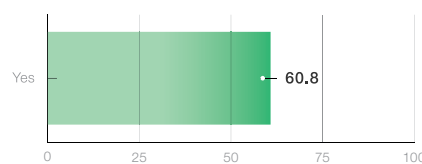
Malaysia: Means to Acquire Skills

Share of respondents (%)



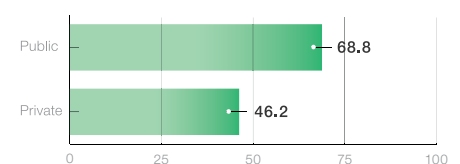
Malaysia: Training Participation

Share of respondents (%)



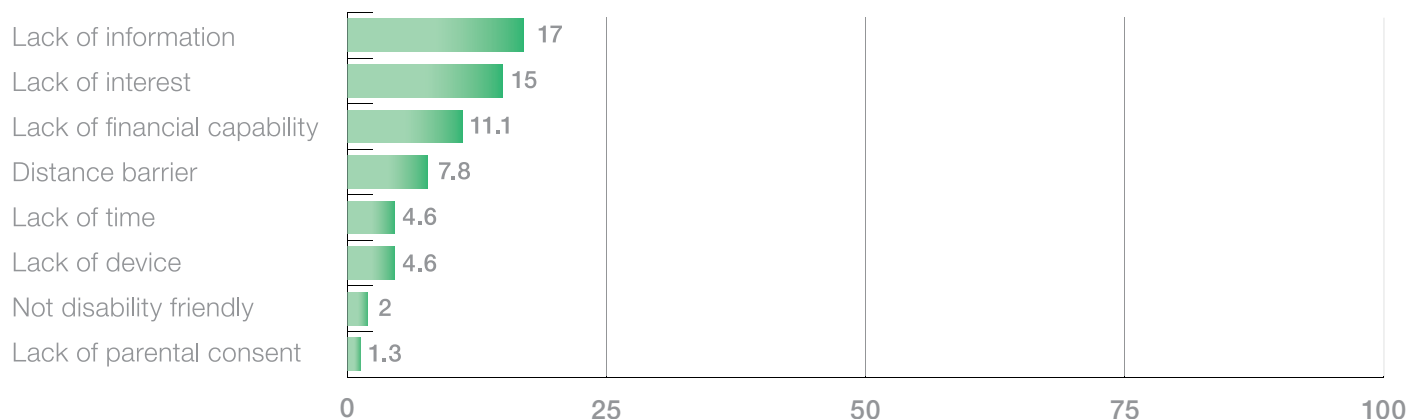
Malaysia: Participation in Training Institutions

Share of respondents (%)



Malaysia: Challenges to Get Training

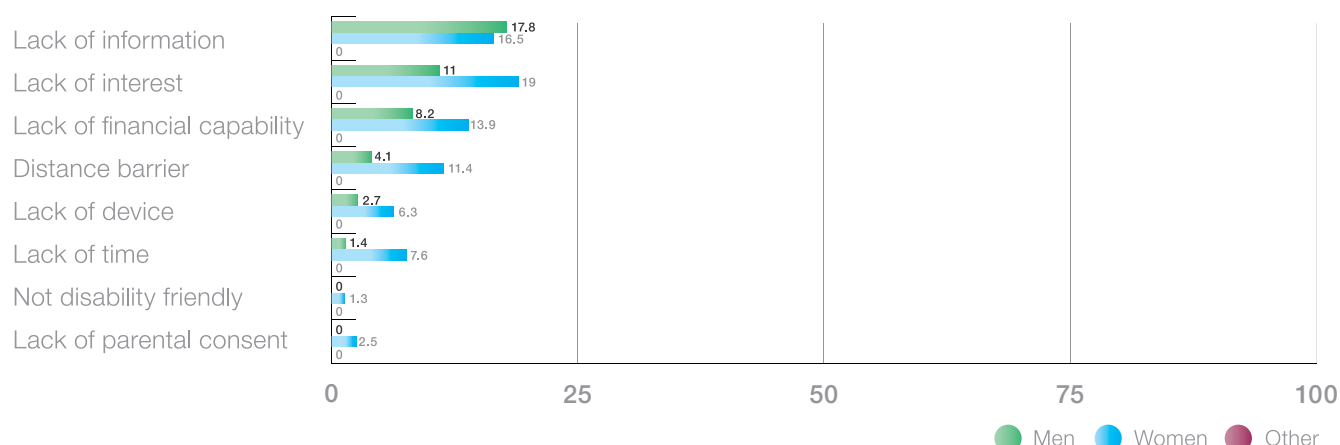
Share of respondents (%)



¹⁶⁷ LOKA Group. (2022).

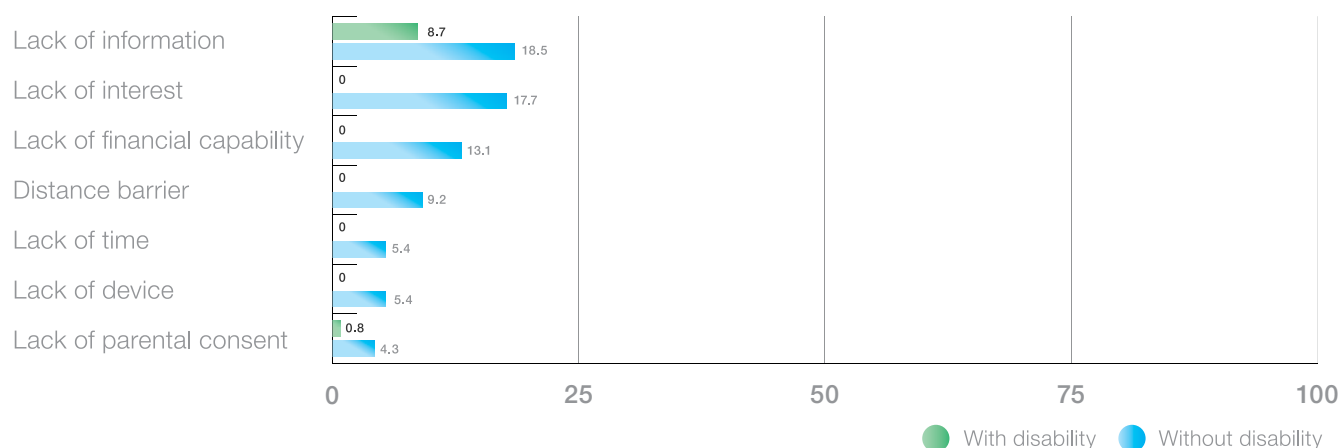
Malaysia: Challenges to Get Training

Share of respondents, by gender (%)



Malaysia: Challenges to Get Training

Share of respondents, by disability status (%)

**Figure 7.3. Learning Behaviour and Challenges in Malaysia**

Source: LOKA Group (2022)

As for young PWDs, lack of information (8.3 per cent) was reported as the primary barrier to training (Fig. 7.3). Furthermore, 4.3 per cent cited that lack of parental consent has constrained them to attend training. This finding runs parallel with the qualitative evidence gathered, which revealed the lack of relevance of training materials and programme offerings for PWDs alongside the lack of instructors qualified in implementing PWD-sensitive training methods. In cases where there are available instructors equipped to conduct such training, the programme offerings were found to not align with the skills demanded in the labour market. Furthermore, the difficulty in seeking parental consent seems to be a gender-specific concern, as young women PWDs are viewed by their parents as vulnerable and prone

to manipulation. The lack of action by state agencies and relevant NGOs highlights the increased need to strengthen community support for young women PWDs in this domain.

Overall, young women were found to be more likely to experience challenges to attend training than young men (Fig. 7.3), with almost 20 per cent of women feeling disinterested to access training compared to only 11 per cent among men. Evidence from the study also suggests a gender gap in terms of access to financial resources, time, proximity to training sites, and the ownership of required devices. Similar to the PWDs, women respondents acknowledged that the absence of parental consent has constrained them from attending training.

Professional Aspirations and Skilling Needs

It was found that young Malaysians' top three future job aspirations are becoming entrepreneurs (32.7 per cent), working as civil servants (22.9 per cent), and serving in the education sector (19 per cent). The high appetite for entrepreneurship aligns with the government's efforts to train young people to be innovative and build their own businesses during the COVID-19 crisis through policy support and stimulus packages.

Malaysia: Job Aspirations

Share of respondents (%)

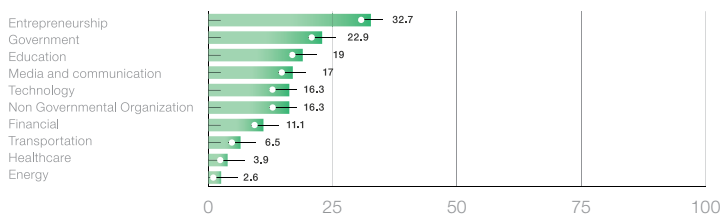


Figure 7.4. Job Aspirations in Malaysia

Source: LOKA Group (2022)

Malaysia: Upskilling and Reskilling

Share of respondents (%)

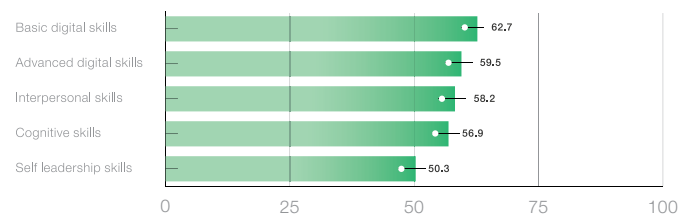


Figure 7.5. Skills to Upskill and Reskill in Malaysia

Source: LOKA Group (2022)

Coinciding with employers' demand for tech-savvy workers, the respondents view basic and advanced digital skills as a high priority for up-skilling and reskilling at 62.7 per cent and 59.5 per cent, respectively. Interestingly, despite the majority of young Malaysians already possessing moderate to expert proficiency in interpersonal, cognitive, and self-leadership skills, more than half of them believe they still need to improve on these domains.

08

Country Overview

Myanmar

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Myanmar

Overview

Myanmar's population is mostly rural and growing. There are a total of 53.4 million inhabitants in the country, half of whom are under the age of 30.¹⁶⁸ The fertility rate is 2.2 children and life expectancy is at 66.9 years. However, statistics show that Myanmar's population is rapidly ageing, and it is estimated that people aged 60 and above will comprise 18.6 per cent of the total population by 2050. A considerable number of Myanmar's elderly also live in poverty, especially those residing in rural areas. A third of older people live in homes without electricity and over half of the population lack running water.¹⁶⁹

As of 2020, a total of 23 million comprise Myanmar's workforce.¹⁷⁰ The country's workforce is primarily male, with around 77.1 per cent of working-age men participating in the labour force in 2017 compared to only 54.3 per cent of working-age women.¹⁷¹ The

youth unemployment rate stood at 2 per cent for both groups in 2018.¹⁷²

The COVID-19 crisis has heavily impacted the people and economy of Myanmar. The unemployment rate rose from 0.5 per cent in 2019 to 1.1 per cent in the pandemic year 2020.¹⁷³ According to a UNDP study, 82 per cent of households reported that their incomes had been, on average, almost cut by half due to the pandemic. It has also resulted in an increase in the number of people living below the poverty line in the country by 11 percentage points.¹⁷⁴ Combined with the effects of the current political crisis, it is predicted that around 25 million people, or nearly half of Myanmar's total population, will live below the poverty line by 2022 – a level of impoverishment not seen in the country since 2005.

Employment Landscape

In light of Myanmar's ongoing political turmoil and a surge in COVID-19 cases, Myanmar's economy is expected to contract around 18 per cent in the Fiscal Year 2021, with damaging implications for

lives, livelihoods, poverty, and future growth.¹⁷⁵ The country's economic activity has been hit hard by mobility restrictions, income reduction, protests, and labour shortages, as well as the ongoing disruption

¹⁶⁸ The Strategist. (2021). *Myanmar's youth demand their future*, in <https://www.aspistrategist.org.au/myanmars-youth-demand-their-future/>

¹⁶⁹ Help Age. (n.d.) *Ageing population in Myanmar*, in <https://ageingasia.org/ageing-population-myanmar/>

¹⁷⁰ World Bank. (2021). *labour force total – Myanmar*, in <https://data.worldbank.org/indicator/SL.TLF.TOTL.IN?locations=MM>

¹⁷¹ Open Development Myanmar. (2020). *COVID-19's impact on employment on women in Myanmar*, in <https://opendevdevelopmentmyanmar.net/topics/covid-19s-impact-on-employment-on-women-in-myanmar/>

¹⁷² ILO. (2019). *Employment and environmental sustainability fact sheets 2019*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-yangon/documents/publication/wcms_624758.pdf

¹⁷³ World Bank. (2021). *Unemployment total – Myanmar*, in <https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?locations=MM>

¹⁷⁴ UNDP. (2022). *Pandemic and political crisis could result in half of Myanmar's population living in poverty by 2022, UNDP says*, in <https://www.undp.org/press-releases/pandemic-and-political-crisis-could-result-half-myanmars-population-living-poverty>

¹⁷⁵ World Bank. (2021). *Myanmar economy expected to contract by 18 per cent in FY2021: Report*, in <https://www.worldbank.org/en/news/press-release/2021/07/23/myanmar-economy-expected-to-contract-by-18-per-cent-in-fy2021-report>

of critical business services (including logistics and telecommunications) and public services such as health and education.¹⁷⁶ An ILO study reported that 5,100 firms were closing down their businesses temporarily because of the pandemic, with the three hardest hit sectors being construction, garments, and tourism and hospitality.¹⁷⁷ Consequently, nearly 19.9 million women and men working in this sector are exposed to medium to high risks of economic disruption, and an estimated 6.9 to 7.3 million jobs were disrupted during the course of this year as a result of pandemic-related containment measures.¹⁷⁸

Unfortunately, young people aged 15 to 24 make up approximately one in six of the workforce, many of whom are employed in at-risk industries. The share of youth employment is even higher in manufacturing and recreation and personal services, where around one in four are young workers. The youth's lack of work experience and COVID-19's adverse impact on education and training also expose them to bleak career prospects throughout their working lives or induce long-term discouragement, especially if the crisis and recovery period becomes prolonged.

Beyond the pandemic, women, youth, and people with disabilities (PWDs) have traditionally faced challenges when accessing the job market. As for women, 42.5 per cent and 40.6 per cent of women workers are employed in the agriculture and services sectors, respectively,¹⁷⁹ which are characterised by high informality and inadequate social protection. The care burden is also disproportionately placed on

women, in addition to having limited opportunities for flexible arrangements to successfully combine work and family responsibilities.¹⁸⁰ In relation to youth, certain regions such as Kayin and Mon State experience higher rates of unemployment compared to the national figures, mainly due to a lack of adequate skills and support. The skills gap is also viewed to stem from a lack of non-practical training activities embedded in the curriculum.¹⁸¹ Meanwhile, PWDs are more likely to be unemployed due to a perceived inability to perform in professional settings. The odds of getting a job are even worse for women PWDs, who face a disproportionate burden of care.¹⁸²

¹⁷⁶ *Ibid.*

¹⁷⁷ ILO. (2021). *Employment in Myanmar since the military takeover: A rapid impact assessment*, in https://www.ilo.org/wcmsp5/groups/public/-/asia/---ro-bangkok/---ilo-yangon/documents/publication/wcms_814681.pdf

¹⁷⁸ ILO. (2020) *COVID-19 Impact on Employment and Labour Market in Myanmar*, in <https://myanmar.un.org/sites/default/files/2020-07/ILO%20Myanmar%20COVID-19%20Impact%20Assessment%20-%20updated.pdf>

¹⁷⁹ ILOSTAT. (2022). *Employment by sex and economic activity*, calculated from https://www.ilo.org/shinyapps/bulkexplorer19/?lang=en&segment=indicator&id=EMP_2EMP_SEX_ECO_NB_A.

¹⁸⁰ Socio-Economic and Gender Resource Institute. (n.d.). *The barriers to women's participation in the labour market in Myanmar*, in <https://dds.ait.ac.th/wp-content/uploads/sites/19/2021/06/Labour-Force-june-3.pdf>

¹⁸¹ NRC. (2020). *2020 Southeast youth-led assessment report*, in <https://www.nrc.no/globalassets/pdf/reports/myanmar-youth-led-assessment-overview/myanmar-yla-report---south-east-2020.pdf>

¹⁸² MIMU. (2021). *Disability in Myanmar (2014-2019)*, in https://themimu.info/sites/themimu.info/files/documents/Report_Analytical_Brief_Disability_MIMU_18Aug2021_ENG.pdf

Skills Demand

Since COVID-19 hit, Myanmar has witnessed a surge in digitalisation as both business and consumers moved to the online environment to adapt to virus containment measures.¹⁸³ Aside from increased demand for fintech services and online cashless transactions,¹⁸⁴ the country witnessed a strong uptake of e-commerce services as a result of the pandemic.¹⁸⁵ The government also established the Myanmar Digital Economy Roadmap in 2019, which aims to enable 'digital transformation, digital government, and digital trade and innovation to develop a digital economy across all sectors for inclusive and sustainable socio-economic development'.¹⁸⁶

A 2014 survey of employers in Myanmar suggests two concerns in the hiring process, namely the lack of up-to-date knowledge at the level of proficiency needed for job-specific requirements and the mismatch between the skills learned and those

needed by industry.¹⁸⁷ Highly valued skills include the ability to perform computer and general IT skills (65 per cent) and the ability to speak foreign languages (57 per cent), among others. Employers also cited poor behavioural skills as an issue, further highlighting the importance of leadership, interpersonal and communication skills, problem-solving, critical thinking, and work ethic and commitment in the hiring process.¹⁸⁸

In line with these findings, it was found that self-leadership skills (e.g. entrepreneurship, time management, self-motivation or initiative, trustworthiness, and working under pressure) have helped 57 per cent of young people in Myanmar to secure a job position, followed by interpersonal skills (45 per cent) and cognitive skills (42 per cent). As shown in Fig. 8.1, fewer respondents alluded to basic and advanced digital skills being helpful in securing a job.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

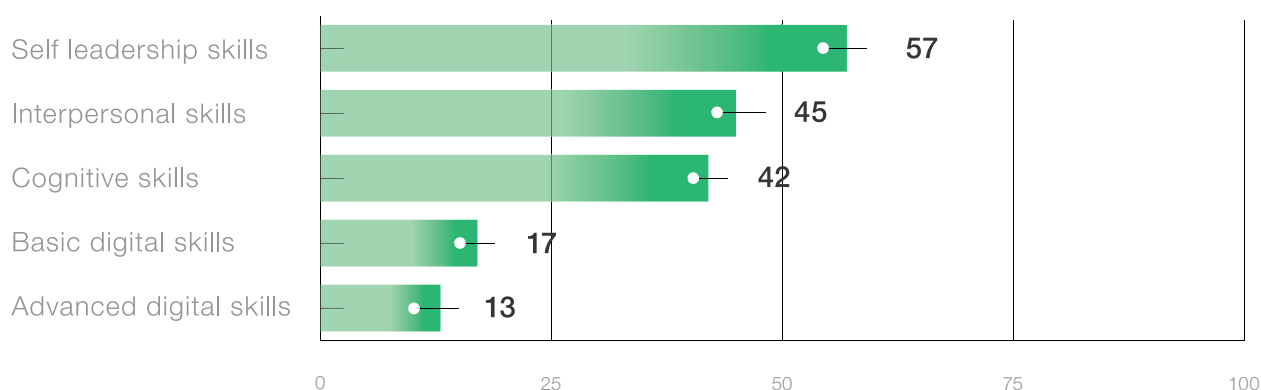


Figure 8.1. Skills Found to be Helpful in Finding a Job in Myanmar

Source: LOKA Group (2022)

¹⁸³ Myanmar Times. (2020). *Myanmar launches e-commerce innovation challenge under COVID-19 plan*, in <https://www.mmtimes.com/news/myanmar-launches-e-commerce-innovation-challenge-under-covid-19-plan.html>

¹⁸⁴ CISION. (2020). *Myanmar's digital transformation during COVID-19*, in <https://en.prnasia.com/lightnews/lightnews-0-104-29375.shtml>

¹⁸⁵ Trade for Development News. (2020). *Supporting an evolving e-commerce ecosystem in Myanmar*, in <https://trade4devnews.enhancedif.org/en/op-ed/supporting-evolving-e-commerce-ecosystem-myanmar>

¹⁸⁶ Digital Economy Development Committee. (n.d.). *Myanmar digital economy roadmap*, in <https://myanmar.gov.mm/documents/20143/9096339/2019-02-07+DEDC+RoadMap+for+Websites.pdf/>

¹⁸⁷ UNESCO. (2020). *TVET system review: Myanmar*, in <https://unesdoc.unesco.org/ark:/48223/pf0000371392>

¹⁸⁸ Cunningham, W. et al. (2018). *Myanmar's future jobs: Embracing modernity overview (Volume 2)*, in https://www.researchgate.net/publication/332038338_Myanmar%27s_Future_Jobs_Embracing_Modernity_Overview_Volume_2_English

The responses gathered from discussions with different private-sector employers in Myanmar also slightly correspond with the patterns described above, emphasising the importance of self-leadership skills in securing jobs. Box 8.1 illustrates the views of a Burmese employer alluding to this point. Communication skills, which fall under interpersonal skills, are also viewed as a key element when coordinating between teams, especially with the shift towards digital work arrangements during the pandemic. Meanwhile, employers in the IT industry expect employees to demonstrate advanced digital skills (e.g. knowledge of programming languages such as Python).

‘When it comes to human capital and skills needed to be successful, whether before or after the pandemic, there’s no change, right? To me, it’s the same. First and foremost, I believe it is not the skills that matter, but the attitudes and management quality of individuals. So whether an individual is willing to work hard, whether an individual has the right mindset to do what is necessary to become successful.’

— Burmese Employer

Box 8.1. Employer Insights in Myanmar

Source: LOKA Group (2022)

Skills Supply

Evidence from the study suggests a potential skill mismatch in future skills. As shown in Fig. 8.2, 79 per cent of the respondents report a complete lack of proficiency in advanced digital skills, while 80 per cent have low to no mastery of basic digital skills. Meanwhile, many respondents also fell in the no to low proficiency range for interpersonal (62 per cent) and self-leadership skills (37 per cent).

Mastery of Future Skills

Share of respondents (%)

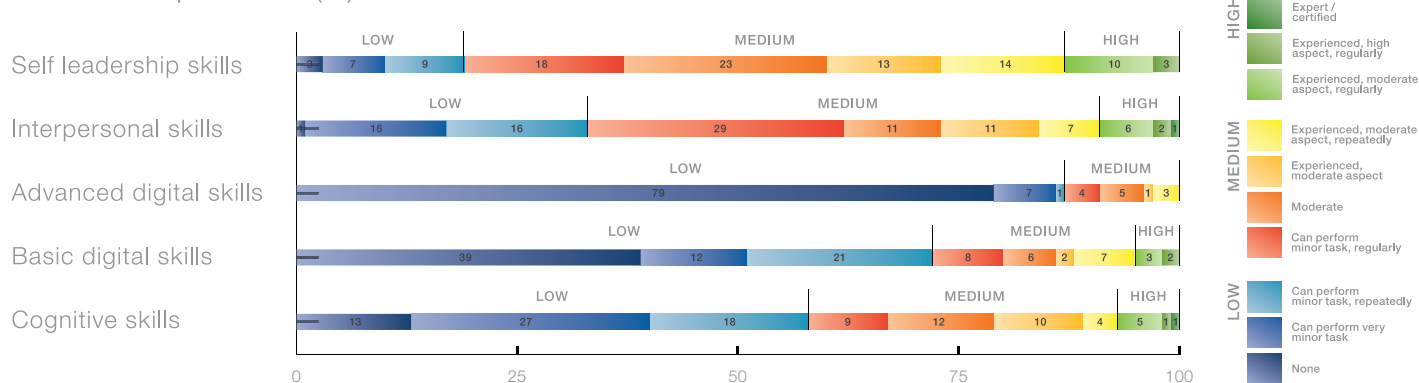


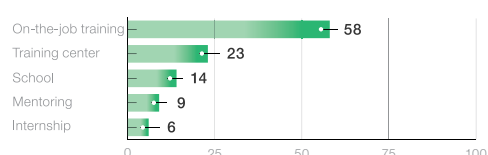
Figure 8.2. Mastery of Future Skills in Myanmar

Source: LOKA Group (2022)

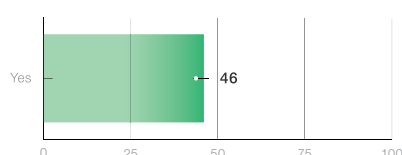
Learning Behaviour

As shown in Fig. 8.3, most young people in Myanmar acquire their skills from work experiences, especially through on-the-job training (58 per cent). Nearly 1 out of 4 respondents also attended training centres (23 per cent). Unlike in other ASEAN countries, the trend of acquiring skills from schools is rather low in Myanmar at only 14 per cent. Meanwhile, less than 1 out of 10 respondents obtained their skills from mentoring (9 per cent) and internship (6 per cent).

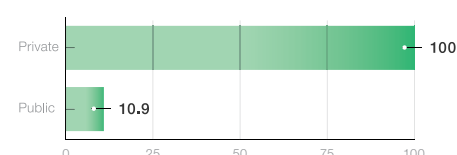
Myanmar:
Means to Acquire Skills
Share of respondents (%)



Myanmar:
Training Participation
Share of respondents (%)

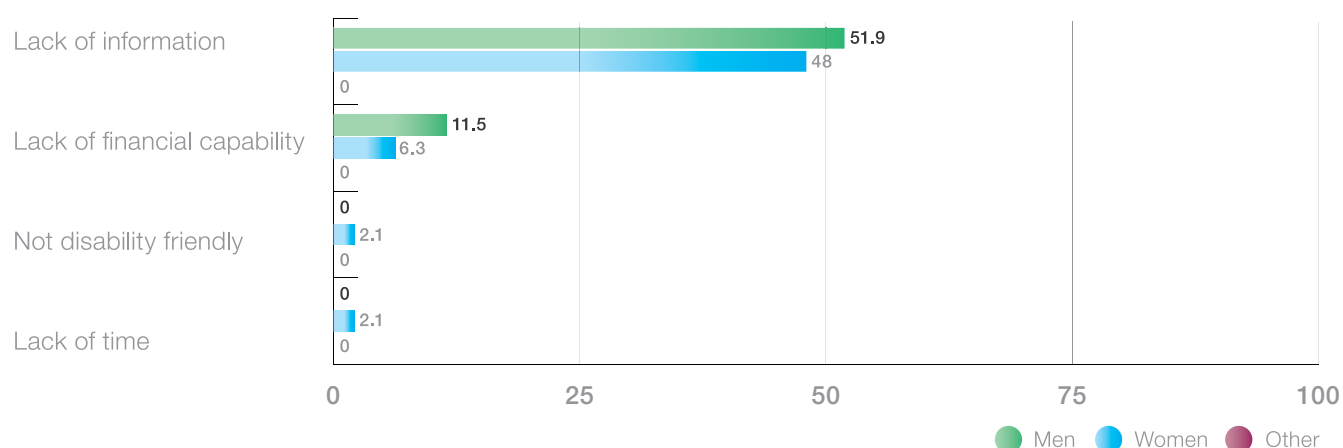


Myanmar: Participation
in Training Institutions
Share of respondents (%)



Myanmar: Challenges to Get Training

Share of respondents, by gender (%)



Myanmar: Challenges to Get Training

Share of respondents (%)

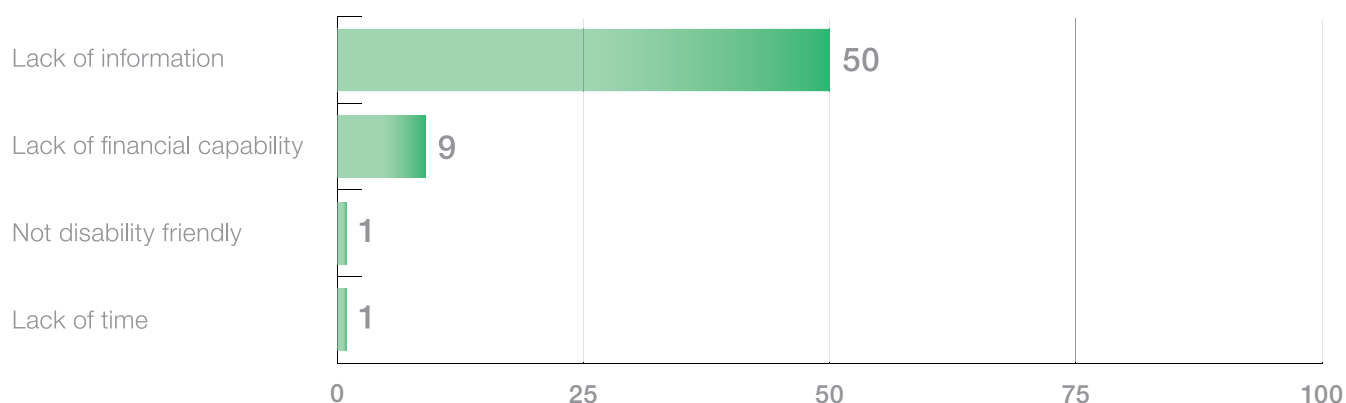


Figure 8.3. Learning Behaviour and Challenges in Myanmar

Source: LOKA Group (2022)

Nearly half of the young people surveyed have reported participating in training at least once (46 per cent). Of this group, all had attended programmes provided by private institutions. Meanwhile, only 10.9 per cent were able to attend government-provided training.

As for barriers, 1 out of 2 respondents cited lack of information or lack of training visibility as a challenge for training participation. Lack of financial capability comes in second with 9 per cent alluding to this point, while only 1 per cent admitted that they have no time to attend training. As shown in Box 8.2, findings from the interviews also revealed that a combined lack of financial capability and time availability has made young people in Myanmar reluctant to attend training, which in turn reduced their opportunities to acquire valuable skills taught in training such as digital skills.

Based on the survey results, there is also no substantial indication of gender disadvantages for women in Myanmar in terms of training participation. It was found that young men are more likely to face financial barriers than young women by 5.3 percentage points at 11.5 per cent and 6.2 per cent, respectively. Interestingly, qualitative data from interviews also revealed that women voiced reluctance to enrol in training not only due to limited financial capacity but also as a result of gendered norms which require them to seek parental consent to participate in evening sessions.

‘Now it is okay, everyone can catch up on the skills they want online. One thing is just the unexpectedly high fees of mobile internet and wifi data. It used to cost 30,000 Myanmar kyats (17 USD) a month for wifi, now it is 75,000 MMK which is equivalent to 42 USD.’

‘I haven’t finished my degree yet, but for my external accreditations, I need to take professional certifications to get a job related to my specialisation. That’s why I have to spend more time, more energy and more money.’
— Underserved Youth Respondents in Myanmar

Box 8.2. Youth Insights in Myanmar

Source: LOKA Group (2022)

Professional Aspirations and Skilling Needs

Over half of the young people in Myanmar aspire to become entrepreneurs (57 per cent), significantly preceding other types of jobs. This is followed by a desire to work in the transportation (10 per cent) and technology sectors (9 per cent). About 7 per cent of the respondents are interested in finding a job in the NGO, media and communication, and education industries, while a few others would like to work in the financial (6 per cent), government (5 per cent), and healthcare (1 per cent) sectors.

Myanmar: Job Aspirations

Share of respondents (%)

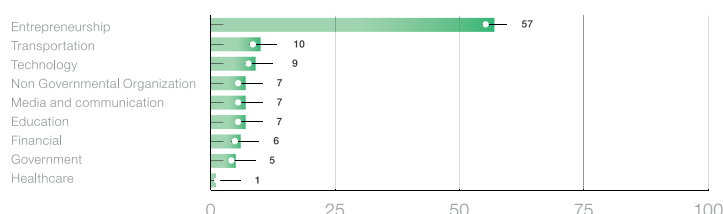


Figure 8.4. Job Aspirations in Myanmar

Source: LOKA Group (2022)

Myanmar: Upskilling and Reskilling

Share of respondents (%)

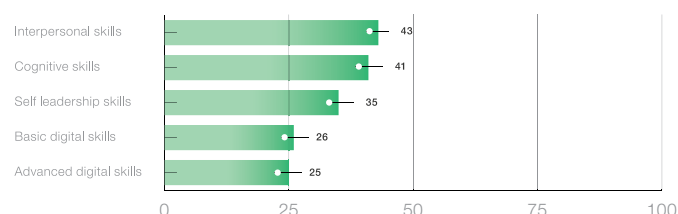


Figure 8.5. Skills to Upskill and Reskill in Myanmar

Source: LOKA Group (2022)

In Myanmar, young people's aspirations to work in the aforementioned sectors are generally not accompanied by a strong commitment to upskill and reskill. Less than half (43 per cent) of the respondents see the need to enhance their interpersonal skills, followed by 41 per cent for cognitive skills and 35 per cent for self-leadership skills. Meanwhile, only around 1 out of 4 young people would like to improve their basic (26 per cent) and advanced digital skills (25 per cent). Overall, it appears that Burmese youth have low aspirations for upskilling and reskilling their digital proficiency, despite perceiving low levels of mastery in this domain.

09

Country Overview

Philippines

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Philippines

Overview

According to the Philippine Statistics Authority (PSA), the total population of the Philippines stood at 109 million in May 2020.¹⁸⁹ By the end of 2021, it is predicted to reach 110 million.¹⁹⁰ The population is nearly gender balanced, with the ratio of male population being slightly over that of females at 50.2 per cent.¹⁹¹ A census on population and housing conducted in 2010 estimated that about 1.4 million persons or 1.6 per cent of the population have a disability, the number being highest among the 15 to 49 age group.¹⁹²

Filipino youth aged 15 to 24 was estimated at 20.2 million individuals or about 18 per cent of the total population.¹⁹³ Of this statistic, 3.9 million young individuals were not in employment, education, or training (NEET).¹⁹⁴ In the same year, the youth unemployment rate was recorded at 6.7 per cent,¹⁹⁵

more than double the unemployment rate of the total labour force.¹⁹⁶ At the height of the COVID-19 pandemic in July 2020, the youth unemployment rate soared to 22.4 per cent for new graduates.¹⁹⁷

Employment Landscape

The COVID-19 pandemic has caused significant disruption to employment in the Philippines. In June 2020, the World Bank projected a 1.9 per cent contraction in the labour force, the first since the

1997 Asian Financial Crisis.¹⁹⁸ The country, which saw rapid economic growth and job expansion prior to the global pandemic, is predicted to have one-quarter of the total employment (around 10.9 million

¹⁸⁹ Philippine Statistics Authority. (2020). <https://psa.gov.ph/population-and-housing/node/166426>

¹⁹⁰ Philippine News Agency. (2021). *PH 2021 population growth lowest in 7 decades*, in <https://www.pna.gov.ph/articles/1163852>

¹⁹¹ World Bank. (2022). *Population, male (% of total population) – Philippines*, in <https://data.worldbank.org/indicator/SP.POP.TOTL.MA.ZS?locations=PH>

¹⁹² Technical Education and Skills Development Authority. (2020). *labour market intelligence report*, in <https://www.tesda.gov.ph/Uploads/File/LMIR%202020/LMIR%20Issue%20No.%201,%20s.%202020%20-%20Enabling%20the%20Disabled.pdf>

¹⁹³ Philippine Statistics Authority. (2020). https://psa.gov.ph/sites/default/files/attachments/hsd/pressrelease/Table4_9.pdf

¹⁹⁴ Philippine Institute for Development Studies. (2021). *Who Are the Youth NEET in the Philippines Today?*, in <https://pidswebs.pids.gov.ph/CDN/PUBLICATIONS/pidsdps2121.pdf>

¹⁹⁵ World Bank (2022). *Unemployment, youth total (%)*, in <https://data.worldbank.org/indicator/SL.UEM.1524.ZS>

¹⁹⁶ World Bank. (2022). *Unemployment, total (%)*, in <https://data.worldbank.org/indicator/SL.UEM.TOTL.NE.ZS?locations=PH>

¹⁹⁷ Yahoo News. (2020). *Filipino youth bears brunt of Philippines unemployment pains*, in <https://ph.news.yahoo.com/filipino-youth-bears-brunt-of-philippines-unemployment-pains-032740760.html>

¹⁹⁸ World Bank. (2020). *Philippines economic update, June 2020: Braving the new normal*, in <https://openknowledge.worldbank.org/handle/10986/33879>

workers) disrupted, either by decreased earnings and working hours or job losses.¹⁹⁹ Women are believed to represent 38 per cent of the jobs at risk.²⁰⁰

The International Labour Organisation (ILO) reports that sectors that have experienced a decline in economic activity due to mobility restrictions will take some time to recover and face severe job disruptions. These include manufacturing, transportation and storage, accommodation and food service activities, arts, entertainment, and recreation.²⁰¹ Around 1.7 million young people aged 15 to 24, which represent 27 per cent of total employment in that age group, are at risk of job disruption as they are employed in the above-mentioned sectors. Young men who are employed mostly in construction, logistics, and manufacturing make up about fifty-eight per cent of the at-risk workforce while the remaining 42 per cent are composed of young women who work mostly in the retail and service industries.²⁰² Compared to their older peers, a larger proportion of young workers can be found in vulnerable job sectors making them more at risk of unemployment.²⁰³

Challenges in accessing the job market have long existed for women, youth, and persons with disabilities in the Philippines. More than 76.7 per cent of female workers are employed in the services sector.²⁰⁴ However, they also tend to be employed

in job sectors with high informality, which stems from systematic patriarchal values that constrain women from pursuing higher education and that limit their opportunities in the formal jobs sector. In a study conducted by the National Economic and Development Authority in 2019, it was reported that employers are reluctant to hire married women as they are perceived to be less productive.²⁰⁵

Meanwhile, the main barriers to employment for the youth are attributed to a mismatch between the skills of new graduates and the needs of the job market, a lack of labour market information, and limited social networks among youth in low-income households.²⁰⁶ A recent study pointed out that youth NEET cite financial constraints as the main barrier to employment.²⁰⁷ The low uptake of training programmes among the youth puts them at a disadvantage as they do not acquire new skills to adapt to the job market.

PWDs encounter numerous challenges in accessing the job market such as a lack of disability-friendly support and bias for male and younger PWDs among employers.²⁰⁸

¹⁹⁹ ILO. (2020). COVID-19 labour market impact in the Philippines, in https://www.ilo.org/wcmsp5/groups/public/-/asia/---ro-bangkok/---ilo-manila/documents/publication/wcms_762209.pdf

²⁰⁰ *Ibid.*

²⁰¹ *Ibid.*

²⁰² *Ibid.*

²⁰³ World Bank. (2021). *Philippines economic update, December 2021*, in <https://thedocs.worldbank.org/en/doc/bca0601a640711811e2dea678fa08c32-0070062021/world-bank-philippines-economic-update-december-2021>

²⁰⁴ ILOSTAT. (2022). *Economic activity by sector*, calculated from https://www.ilo.org/shinyapps/bulkexplorer19/?lang=en&segment=indicator&id=EMP_2EMP_SEX_ECO_NB_A

²⁰⁵ National Economic and Development Authority. (2019). *Determinants of female labour force participation in the Philippines*, in <https://neda.gov.ph/wp-content/uploads/2021/09/Determinants-of-Female-labour-Force-Participation-in-the-Philippines.pdf>

²⁰⁶ ADB. (2018). *Social protection brief: Reducing youth not in employment, education, or training through JobStart Philippines*, in <https://www.adb.org/sites/default/files/publication/396081/adb-brief-084-youth-not-employment.pdf>

²⁰⁷ Philippine Institute for Development Studies. (2021). *Who are the youth NEET in the Philippines today?*, in <https://pidswebs.pids.gov.ph/CDN/PUBLICATIONS/pidsdps2121.pdf>

²⁰⁸ Alson, J. et al. (n.d.). *Factors Affecting Employability of Persons with Disabilities*, in <http://ijmrap.com/wp-content/uploads/2019/02/IJMRAP-V1N8P271Y19.pdf>

Skills Demand

The information technology (IT) industry in the Philippines has seen rapid growth since the early 2000s. In a 2020 report published by LinkedIn, all of the ten emerging jobs in the country require basic digital skills.²⁰⁹ Meanwhile, eight out of the ten roles require advanced proficiency in digital skills. These ten emerging job roles are robotics engineer, cyber security specialist, customer success specialist, data scientist, sales development representative, full-stack engineer, DevOps engineer, data engineer, javascript engineer, and cloud engineer.

The study, which draws from a series of discussions with Filipino employers, highlights the importance of mastering English communication skills and digital skills, especially given that a substantial number of young workers are employed in low-skilled and informal employment sectors that do not require proficiency in these skills. Employers admit that given the nature of many jobs requiring young people to perform client-facing duties, including communicating

with non-Filipino clients, English has become the common daily working language in the emerging sectors. Furthermore, they feel that a substantial amount of job output is now computer-generated, underscoring the need for workers to be proficient in the use of office applications and data organisation tools such as Google Drive and SharePoint.

Meanwhile, results from the survey depicted in Fig. 9.1 reveal that young workers found interpersonal skills (70.1 per cent) to be helpful in securing their current jobs, along with self-leadership (67 per cent) and cognitive skills (66 per cent). However, contrary to the LinkedIn report, digital skills were considered not as useful as the above-mentioned skills. A little over half of youth (52.6 per cent) found basic digital skills helpful in securing a job, while those who believe advanced digital skills are helpful stood at 33 per cent. From this, it can be observed that there is a divergence between the skills perceived as important by the youth and employers.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

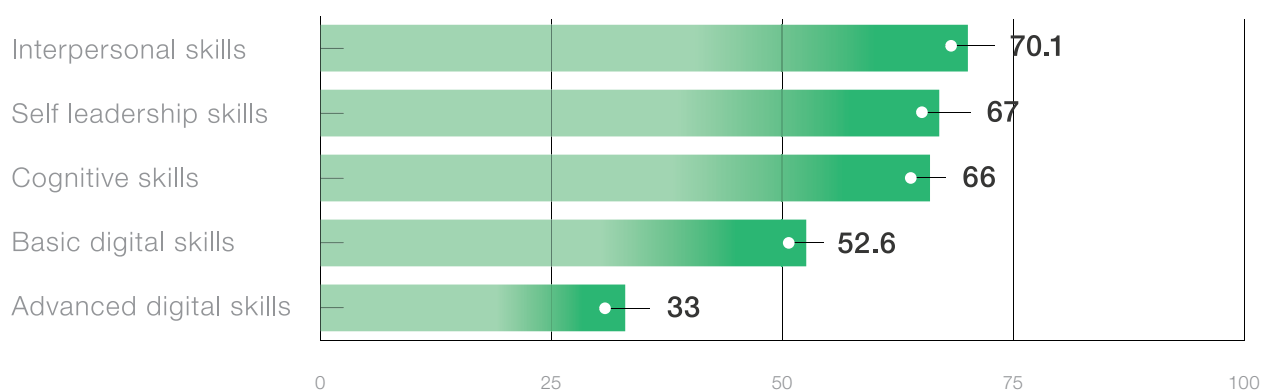


Figure 9.1. Skills Found to be Helpful in Finding a Job in the Philippines

Source: LOKA Group (2022)

²⁰⁹ LinkedIn. (2020). *Emerging Jobs Report Philippines*, in https://business.linkedin.com/content/dam/me/business/en-us/talent-solutions/emerging-jobs-report/LinkedIn_EJR_PH_final.pdf

Skills Supply

Our study found a considerable divide between the supply and demand of skills, especially in digital skills. Nearly 29 per cent of young people have no advanced digital skills, while 41.3 per cent have poor mastery of advanced digital skills. Taken together, 70.2 per cent of young people have no to low mastery in advanced digital skills. In addition, there was an almost equal proportion of youth who hold basic digital skills proficiency and those who do not.

Mastery of Future Skills

Share of respondents (%)

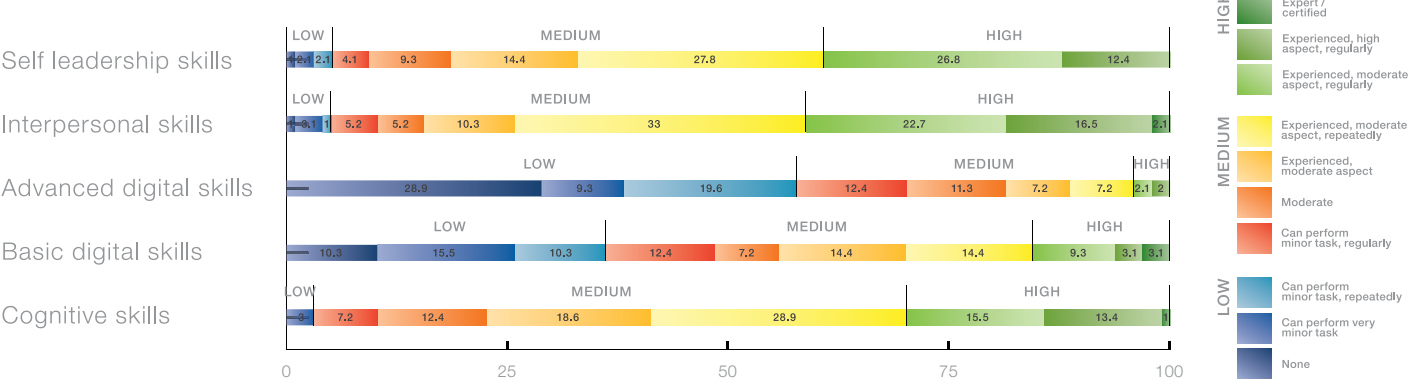


Figure 9.2. Mastery of Future Skills in the Philippines

Source: LOKA Group (2022)

For the rest of the skill categories, 90.7 per cent of young workers have mostly mastered self-leadership skills at a moderate to expert level. In contrast, 89.8 per cent and 89.7 per cent have a moderate to expert proficiency in cognitive and interpersonal skills. These findings are confirmed by discussions with underserved young men and women who regarded self-leadership and interpersonal skills as pivotal to securing a job. Box 9.1, which contains insights from select young women from the Philippines, captures this point.

'I think being assertive and versatile are the most important skills. I have also experienced working before wherein one's working environment, particularly the job description, is not only limited to what is written there; hence you really need to be assertive and versatile. Moreover, self-management and punctuality are also important, not only when you are going to work but also when submitting your output and beating the deadlines.'

- Young woman respondent from the Philippines

Box 9.1. Youth Insights in the Philippines

Source: LOKA Group (2022)

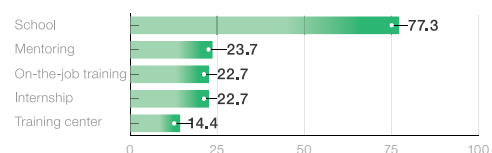
Learning Behaviour

Most Filipino youth acquire their skills formally. The study discovered that 77.3 per cent of young people in the Philippines had obtained their skills from formal education (Fig. 9.3). A smaller proportion of youth acquired their skills from mentoring activities (22.7 per cent), on-the-job training, and internship (22.7 per cent). Only 14.4 per cent of youth acquired their skills in training centres.

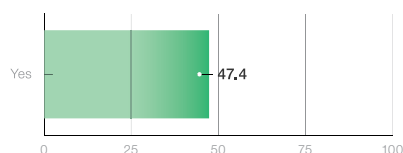
More than half of young people have not yet participated in any training activities (52.6 per cent). Of those who have participated in the training, 60.9 per cent were from private providers while 47.8 per cent were organised by the government.

In the Philippines, a lack of financial capacity or the high cost of training is the most widely-cited challenge to attending training among young people (36.1 per cent). In connection to this, respondents also mentioned that incidental expenses such as the need to purchase materials or software (e.g. Microsoft Office, STATA, and SPSS) prohibit them from pursuing skills training programmes.

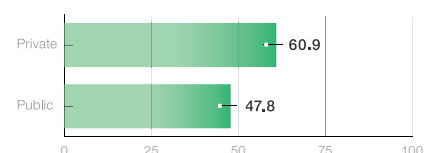
Philippines: Means to Acquire Skills
Share of respondents (%)



Philippines: Training Participation
Share of respondents (%)

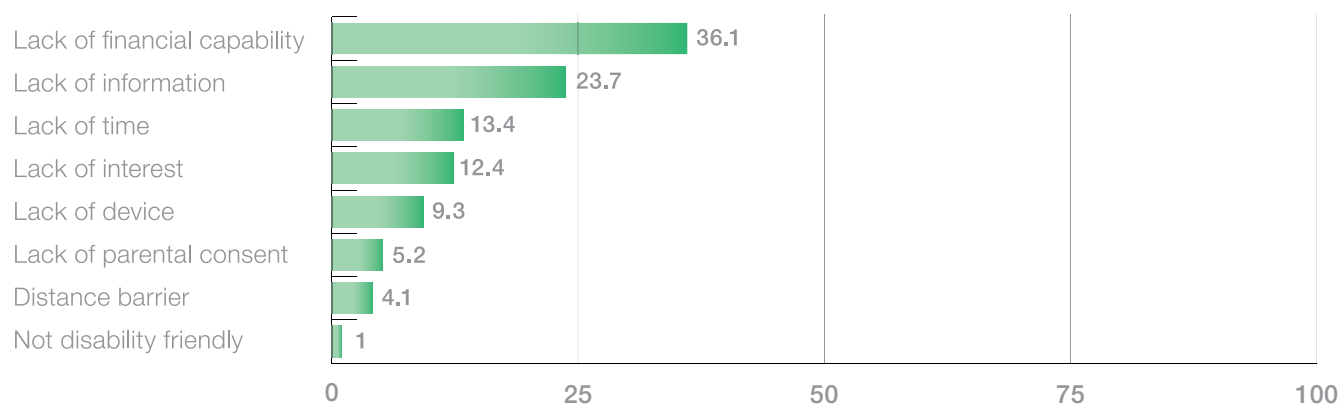


Philippines: Participation in Training Institutions
Share of respondents (%)



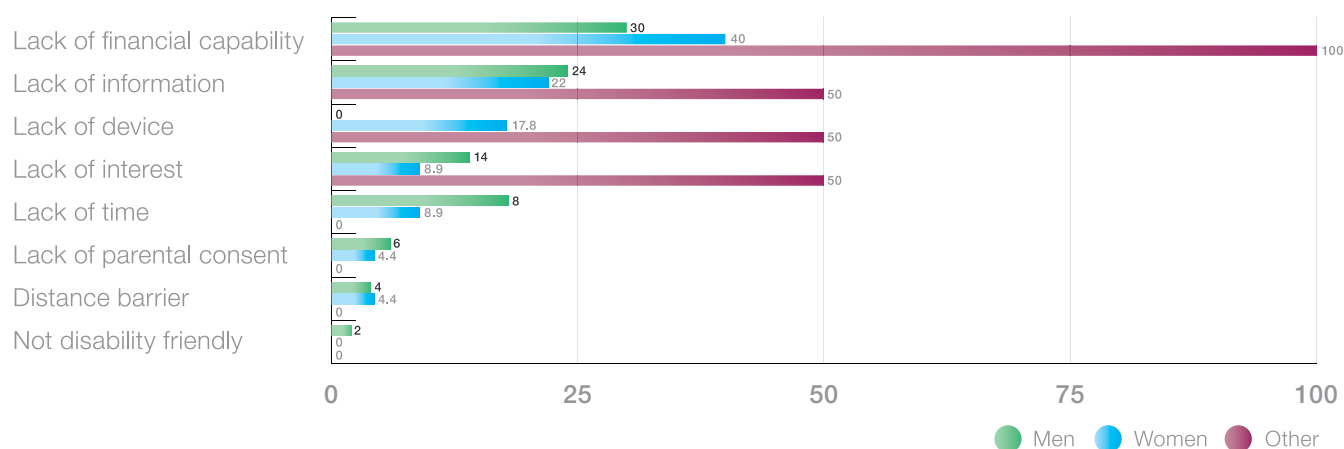
Philippines: Challenges to Get Training

Share of respondents (%)



Philippines: Challenges to Get Training

Share of respondents, by gender (%)



Philippines: Challenges to Get Training

Share of respondents, by disability status (%)

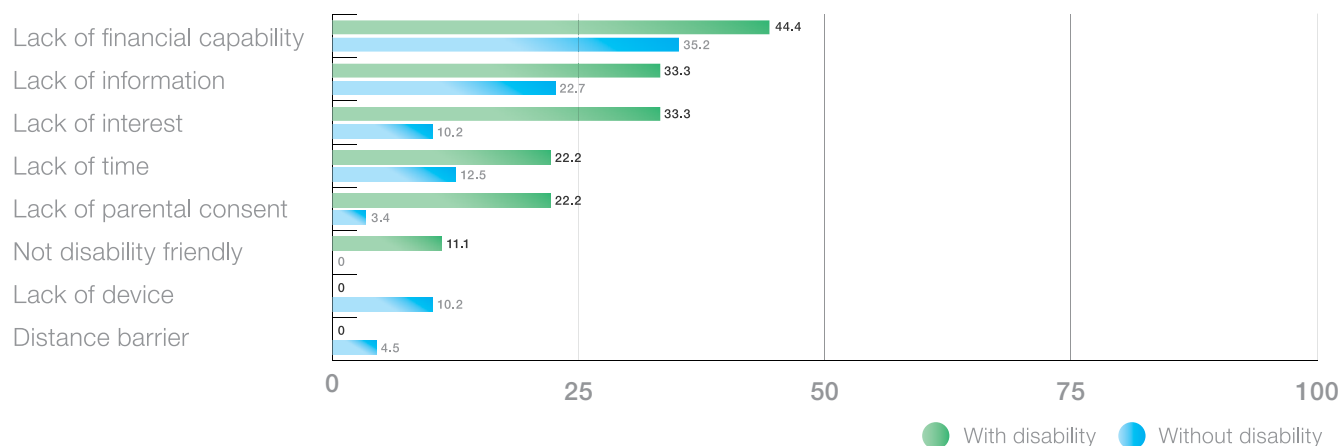


Figure 9.3. Learning Behaviour and Challenges in the Philippines

Source: LOKA Group (2022)

Other challenges for not attending training include lack of information (23.7 per cent), time constraints (13.4 per cent), and lack of interest (12.4 per cent). Barriers to training that each received less than 10 per cent of responses include lack of devices (9.3 per cent), lack of parental consent (5.2 per cent), distance (4.1 per cent), and lack of disability-friendly training (1 per cent). The study also found that 10 per cent more young women than men experience financial difficulty in participating in training. Nearly 18 per cent of young women cite a lack of devices as another challenge. In contrast, young men did not cite access to devices as a challenge to participating in training.

On average, more young persons with disabilities experience challenges in training compared to their non-disabled peers. The following barriers to training were cited more by young PWDs: lack of financial capacity (10 per cent), lack of information (10.6 per cent), and lack of time (9.7 per cent). At least 22.2 per cent of young PWDs are not allowed to attend training by their parents. This is even more prevalent among young women PWDs whose parents tend to be more protective and wary of the training environment.

Professional Aspirations and Skilling Needs

Philippines: Job Aspirations

Share of respondents (%)

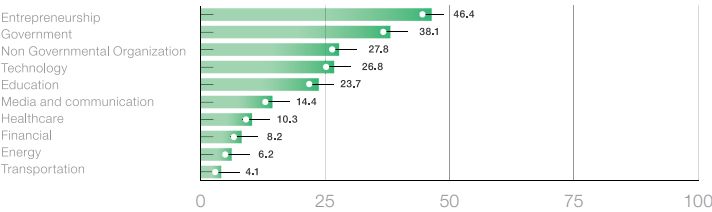


Figure 9.4. Job Aspirations in the Philippines

Source: LOKA Group (2022)

Nearly half of young people in the Philippines (46.4 per cent) aspire to become entrepreneurs. This is followed by young people seeking careers in the government (38.1 per cent), NGOs (27.8 per cent), technology (26.8 per cent), and education (23.7 per cent) sectors. Fewer young people look to find jobs in the media and communication (14.4 per cent), and healthcare (10.3 per cent) sectors. Industries that received the least interest among young job-seekers include finance (8.2 per cent), energy (6.2 per cent), and transportation (4.1 per cent).

Philippines: Upskilling and Reskilling

Share of respondents (%)

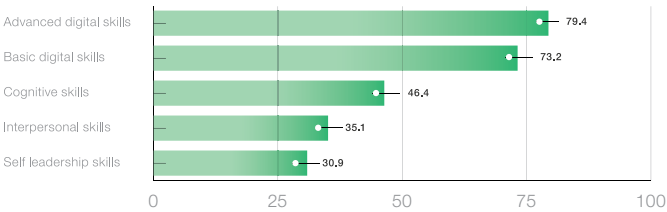


Figure 9.5. Skills to Upskill and Reskill in the Philippines

Source: LOKA Group (2022)

Along with their career aspirations, young people believe that improving their current skill sets is crucial. Nearly 79.4 per cent of young people believe that they need to acquire basic digital skills while 73.2 per cent think they need to acquire advanced digital skills. Other career resources that young people believe need to be improved are cognitive skills (46.6 per cent), interpersonal skills (35.1 per cent), and self-leadership skills (30.9 per cent).

10



Country Overview

Singapore

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Singapore

Overview

Singapore is the City-State of Southeast Asia with a total land area of 709 sq. kms.,²¹⁰ located on the southern tip of the Malay peninsula. Comprised of a total population of 5.5 million,²¹¹ the share of males is slightly higher compared to females at 52.3 per cent.²¹² The ratio of persons with disabilities (PWDs) in Singapore is at 3.4 per cent,²¹³ or estimated to be around 185,000 citizens. The country is now undergoing a demographic change. By 2030, 25 per cent of Singapore's population is predicted to be aged 65 and older, compared to 14.4 per cent in 2019.²¹⁴

Young people aged 15 to 29 constitute 13.1 per cent of the total population, or nearly 747,000.²¹⁵ The population ratio of young women is slightly higher (50.2 per cent) than young men.²¹⁶ The youth unemployment rate is at 5.9 per cent as of 2019, 2.8 percentage points higher than overall unemployment

rate.²¹⁷ In Singapore, a large proportion of young people aged 15 – 34 work as associate professionals and technicians (29.8 per cent).

Among all age groups, youths aged 15 to 24 were most negatively affected by the pandemic, experiencing the largest decrease in employment as a result of economic contraction in their work sectors. The most affected industries include food and beverage, administrative and support services, and retail trade.²¹⁸ Compared to the year before, the youth unemployment rate increased by 0.4 per cent from 9.3 per cent in 2019 to 9.7 per cent in 2020.²¹⁹ Aside from job losses, the pandemic also led to a 0.4 percentage point increase in the ratio of youths not in education, employment, or training (NEET), climbing from 4.1 per cent in 2019 to 4.5 per cent in 2020. Meanwhile, the NEET ratio increase for young women was 0.2 per cent higher than that of men.²²⁰

²¹⁰ World Bank. (2022). *Land area, sq.km*, in <https://data.worldbank.org/indicator/AG.LND.TOTL.K2?locations=SG>

²¹¹ Statistics Singapore. (2022). *Singapore population*, in <https://www.singstat.gov.sg/modules/infographics/population>

²¹² World Bank. (2022). *Population, male (%)*, in <https://data.worldbank.org/indicator/SP.POP.TOTL.MA.ZS?locations=SG>

²¹³ Ministry of Social and Family Development. (2018). *Total number of persons with disabilities in Singapore*, in <https://www.msf.gov.sg/media-room/Pages/Total-number-of-persons-with-disabilities-in-Singapore.aspx>

²¹⁴ ADB. (n.d.). *Singapore's long-term care system: Adapting to population aging*, in <https://www.adb.org/sites/default/files/publication/637416/singapore-care-system-population-aging.pdf>

²¹⁵ National Youth Council Singapore. (2020). *Youth Statistics in Brief 2020*, in <https://www.nyc.gov.sg/en/initiatives/resources/youth-statistics-in-brief/>

²¹⁶ *Ibid.*

²¹⁷ *Ibid.*

²¹⁸ Ministry of Manpower. (2020). *Labour force in Singapore 2020*, in https://stats.mom.gov.sg/iMAS_PdfLibrary/mrds_2020LabourForce_survey_findings.pdf

²¹⁹ Statista. (2021). *Unemployment rate for individuals aged 15 to 24 years in Singapore from 2011 to 2020*, in <https://www.statista.com/statistics/708329/singapore-youth-unemployment-rate/>

²²⁰ ILOSTAT. January 2022.

Employment Landscape

Singapore has experienced four major economic downturns leading to employment losses since the 1990s: the 1998 ASEAN financial crisis, the dot-com bust in 2001, the global financial crisis in 2009, and the global pandemic in 2020.²²¹ The nature of the COVID-19 crisis, however, affected a distinct group of sectors compared to those impacted by the economic recessions that preceded it. The sectors that could be supported by remote working, such as finance and insurance, ICT, trade-related, and other domestic-oriented sectors have been less affected by the economic contraction. Meanwhile, the sectors that suffered the most include real estate, professional services, administrative and support, construction, consumer-facing, and travel-related industries.²²² Of these, at least two industries are top sectors employing residents aged 15 to 34 years. For instance, young people employed in the administrative and support services sector are around 20.9 per cent of the total youth population,

followed by professional services employing 9.9 per cent of youths in the country.²²³ While there is no report on widespread job cuts or layoffs for young people in Singapore, anecdotal reports point to the difficulties that young people experience in the labour market, such as job insecurity, pay cuts, and loss of earnings.²²⁴

In Singapore, women and youth generally experience fewer employment barriers as evidenced by a 26 per cent increase in female labour utilisation since 1970²²⁵ and an innovative education and training curriculum.²²⁶ However, the same cannot be said for PWDs, who have traditionally faced a number of challenges. Employment discrimination combined with a lack of confidence and family support has weakened PWDs' intention to enter the job market.²²⁷

²²⁸

²²¹ Ministry of Trade and Industry. (2021). *Economic survey of Singapore third quarter 2021*, in <https://www.mti.gov.sg/Resources/Economic-Survey-of-Singapore/2021/Economic-Survey-of-Singapore-Third-Quarter-2021>

²²² Monetary Authority of Singapore. (n.d.). *The Singapore economy*, in https://www.mas.gov.sg/media/MAS/EPG/MR/2021/Apr/MRApr21_Chpt_2.pdf?la=en&hash=9FDB268E3BFE214CAEE51A61A8ABB50000857BEF

²²³ National Youth Council. (2020). *Youth statistics*.

²²⁴ CNA. (2020). *The big read: Singapore's oft-maligned millennials face their first crisis*, in <https://www.channelnewsasia.com/singapore/covid19-big-read-millennials-face-first-crisis-762081>

²²⁵ ILO. (2010). *Women in labour markets: Measuring progress and identifying challenges*, in https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_elm/---trends/documents/publication/wcms_123835.pdf

²²⁶ APEC. (2018). *Best practices of youth employment policies in selected APEC economies*, in https://www.apec.org/docs/default-source/Publications/2019/1/Best-Practices-of-Youth-Employment-Policies-in-Selected-APEC-Economies/219_HRD_Best-Practices-of-Youth-Employment-Policies-in-Selected-APEC-Economies.pdf

²²⁷ Disabled People's Association. (2018). *Discrimination faced by people with disabilities at workplace*, in <https://www.dpa.org.sg/wp-content/uploads/2018/07/Discrimination-Faced-by-People-with-Disabilities-at-the-Workplace-Study-1.pdf>

²²⁸ CNA. (2020). *They have the skills and qualifications, So why can't these disabled people find good jobs*, in <https://www.channelnewsasia.com/singapore/persons-with-disabilities-jobs-unemployment-discrimination-772486>

Skills Demand

Eight of the ten top-ranking emerging job roles in Singapore reported by LinkedIn's 2020 Emerging Jobs Report require proficiency in advanced digital skills.²²⁹ These roles are artificial intelligence specialist, robotics engineer (software), full stack engineer, backend developer, data scientist, DevOps engineer, data engineer, and cybersecurity specialist. The other two roles are community specialist and partnership specialist, which both require proficiency in at least basic digital skills.

Among these emerging job positions, employers in Singapore emphasise that it is critical for Singaporean youth to have moderate proficiency in communication using virtual platforms. They admit that nearly all meetings are being held online given that remote modes of work have become the preferred arrangement during COVID-19 times. A study by Microsoft found that the pandemic has expanded the workday by 37 per cent in Singapore,²³⁰ resulting

in higher rates of employee burnout compared to Australia, India, and Japan.²³¹ This shows that Singaporean workers are in significantly more meetings, take more ad hoc calls, and manage more incoming chats than they had been used to before the pandemic. As such, the demand for proficiency in skills related to the performance of these duties is on the rise.

As for the skills demand from the perception of the young people in Singapore, survey results revealed that cognitive skills (69 per cent) and interpersonal skills (63 per cent) to be the most helpful in securing jobs (Fig. 10.1). They are followed by self-leadership skills (53 per cent), basic digital skills (35 per cent), and advanced digital skills (21 per cent). This shows a gap in the types of skills employers currently see as important and those that young people think are useful in obtaining employment.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

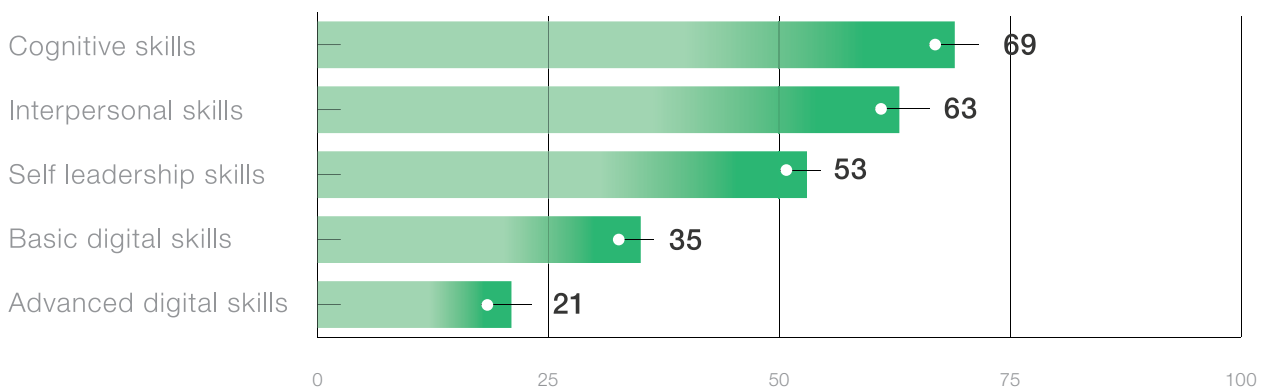


Figure 10.1. Skills Found to be Helpful in Finding a Job in Singapore

Source: LOKA Group (2022)

²²⁹ LinkedIn. (2021). *Emerging jobs report in Singapore*, in https://business.linkedin.com/content/dam/me/business/en-us/talent-solutions/emerging-jobs-report/SG_EJR_2020_Final.pdf

²³⁰ Red Thread. (n.d.). *Key findings from Microsoft's work trend index report 2020*, in <https://www.red-thread.com/blog/microsoft-work-trend-index/>

²³¹ Microsoft. (2020). *Close to one-third of Asia-Pacific remote and firstline workers are facing increased burnout at work*, in <https://news.microsoft.com/apac/2020/09/29/close-to-one-third-of-asia-pacifics-remote-and-firstline-workers-are-facing-increased-burnout-at-work/>

Skills Supply

In addition to the difference in perceptions around the importance of digital skills, a gap also exists regarding the respondents' perceived levels of mastery of essential skills. For instance, survey results depicted in Fig. 10.2 show that a considerable share of the respondents reported having moderate- to expert-level proficiency in cognitive skills (91 per cent), interpersonal skills (86 per cent), and self-leadership skills (74 per cent). However, it is interesting to note that while Singapore is ranked second among the most digitally competitive countries globally,²³² more than 1 out of 3 young Singaporeans are either entirely or mostly lacking basic digital skills (39 per cent). Meanwhile, 21 per cent report not having any advanced digital skills at all, and a total of 2 of 3 young Singaporeans have none to low proficiency in this skill domain.

Mastery of Future Skills

Share of respondents (%)

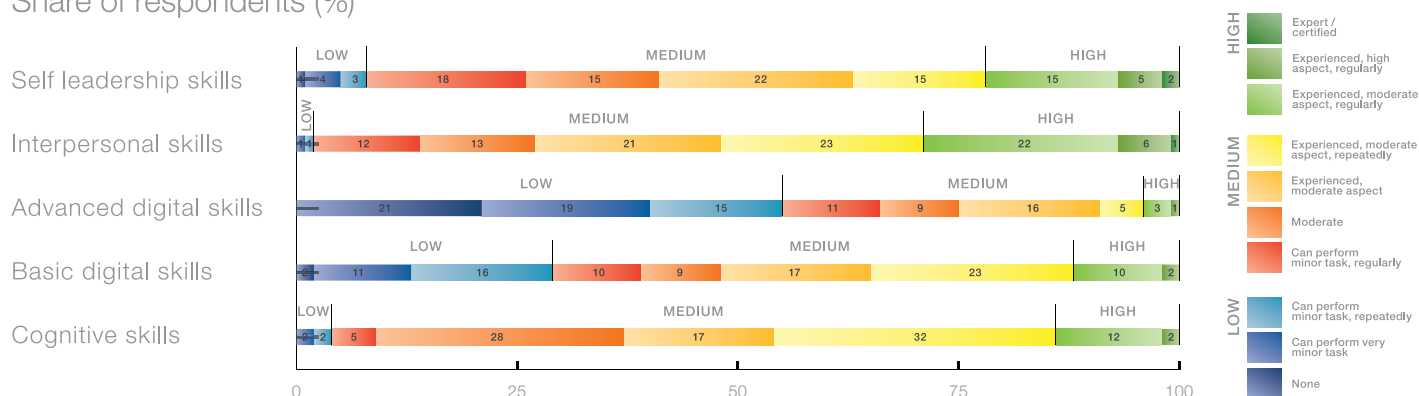


Figure 10.2. Mastery of Future Skills in Singapore

Source: LOKA Group (2022)

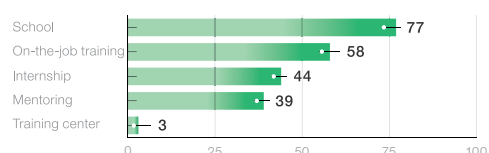
²³² IMD. (2022). *World competitiveness centre rankings*, in <https://www.imd.org/centres/world-competitiveness-centre/rankings/>

Learning Behaviour

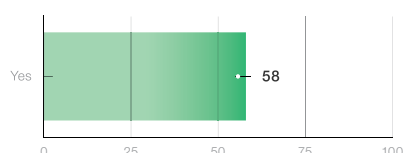
As shown in Fig. 10.3, more than 2 out of 3 young people in Singapore (77 per cent) obtained their skills from formal education, while a substantial proportion also developed their skills from on-the-job training (58 per cent). Meanwhile, less than half of the total number of respondents did so by joining an internship programme (44 per cent) or through mentoring (39 per cent)

per cent). Very few received their skills from training centres (3 per cent). More than half of young people in Singapore have participated in at least one training activity (58 per cent). However, a large proportion of them attended privately-organised training (69 per cent) compared to government-provided ones (34.5 per cent).

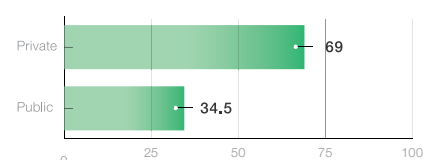
Singapore: Means to Acquire Skills
Share of respondents (%)



Singapore: Training Participation
Share of respondents (%)

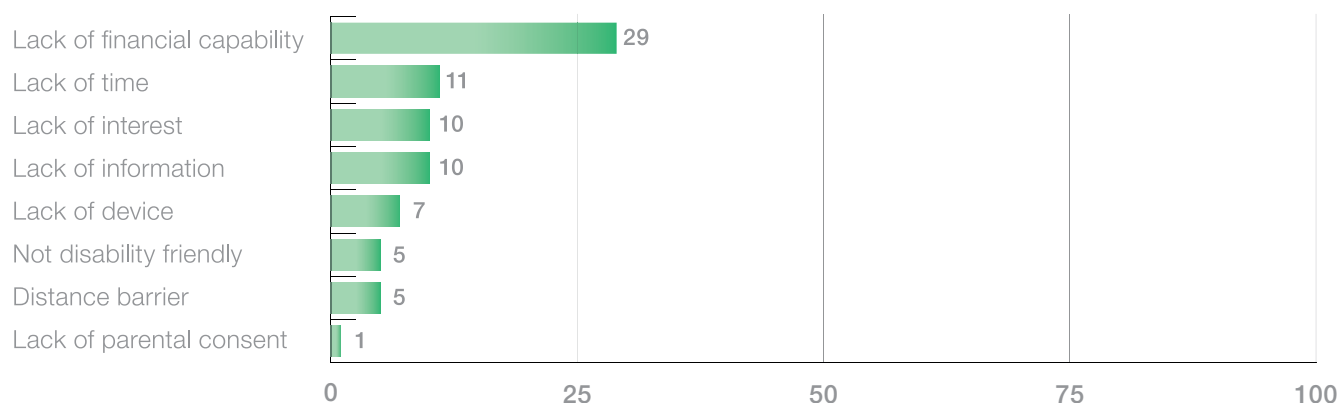


Singapore: Participation in Training Institutions
Share of respondents (%)



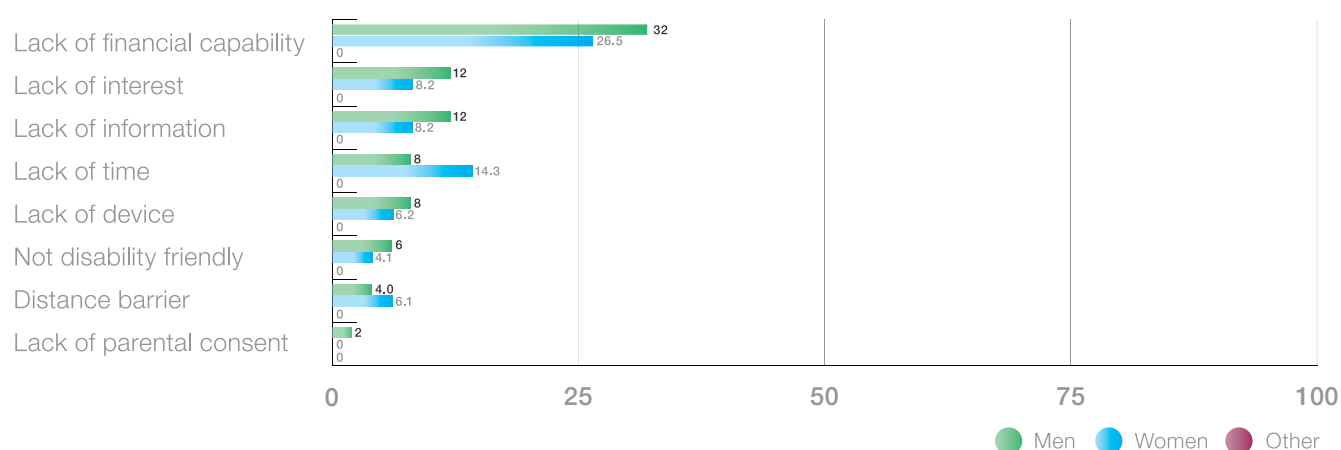
Singapore: Challenges to Get Training

Share of respondents (%)



Singapore: Challenges to Get Training

Share of respondents, by gender (%)



Singapore: Challenges to Get Training

Share of respondents, by disability status (%)

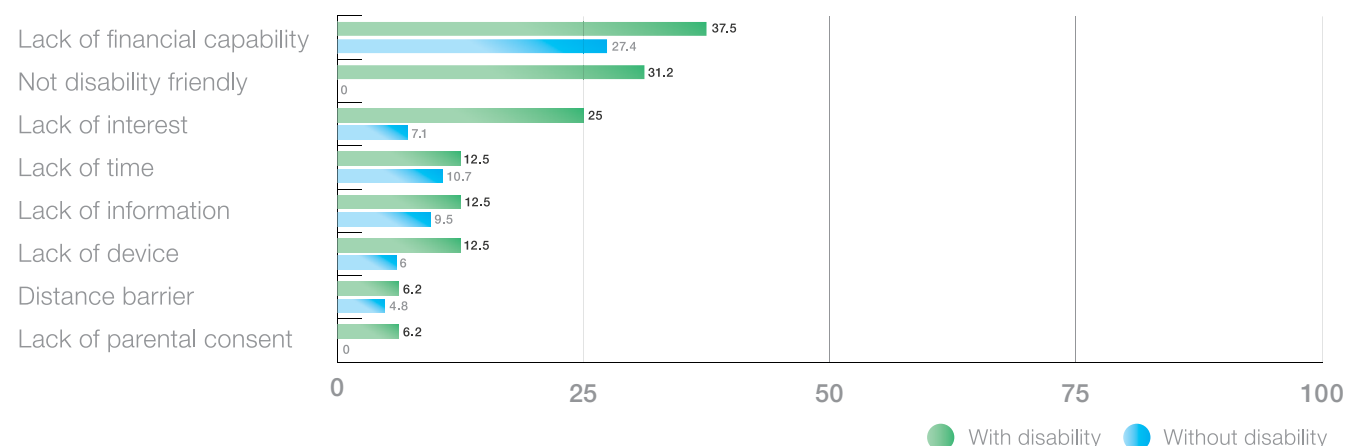


Figure 10.3. Learning Behaviour and Challenges in Singapore

Source: LOKA Group (2022)

Regarding training access, lack of financial capacity has been listed as the top barrier (29 per cent). Some others cite lack of time (11 per cent), lack of interest (10 per cent), and lack of information (10 per cent) as other types of challenges.

Meanwhile, less than 10 per cent of the population indicate the following considerations for not attending training activities: lack of device (7 per cent), lack of disability-friendly training (5 per cent), distance (5 per cent), and lack of parental consent (1 per cent).

Young women are more likely to have less time to attend training than young men by 6 per cent, while

the proportion of women facing distance barriers is 2 per cent higher than young men. Young PWDs also experience a higher proportion of obstacles than their non-PWD counterparts. For instance, they tend to experience financial limitations by 10 percentage points, and 1 out of 4 young PWDs find no interest in attending training activities (25 per cent). A smaller percentage cite other barriers such as lack of disability-friendly training (12.5 per cent) and difficulties seeking parental consent (6.2 per cent).

Professional Aspirations and Skilling Needs

Fig. 10.4 shows that the top job aspiration among young people in Singapore is to work in the media and communication sectors (33 per cent). Many would also like to find roles in education (28 per cent), entrepreneurship (26 per cent), technology (22 per cent), and the government sector (22 per cent). Less than 20 per cent wanted a career in the NGO (17 per cent), finance (14 per cent), and healthcare sectors (12 per cent). Meanwhile, the aspiration to work in the transportation and energy sectors is extremely low in Singapore at 5 per cent and 3 per cent, respectively.

Singapore: Job Aspirations
Share of respondents (%)

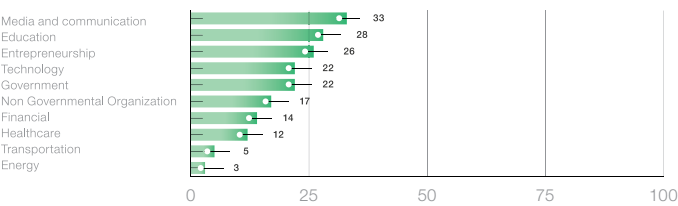


Figure 10.4. Job Aspirations in Singapore
Source: LOKA Group (2022)

Singapore: Upskilling and Reskilling
Share of respondents (%)

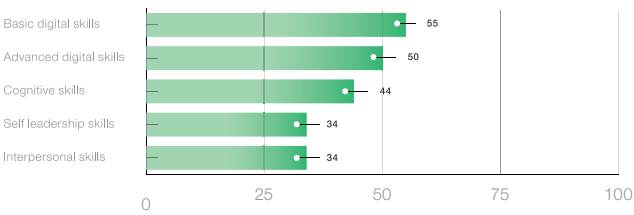


Figure 10.5. Skills to Upskill and Reskill in Singapore
Source: LOKA Group (2022)

As shown in Fig. 10.5, around half of the respondents perceive a need to acquire both basic (55 per cent) and advanced (50 per cent) digital skills. Other skills they wish to improve are cognitive (44 per cent), self-leadership (34 per cent), and interpersonal skills (34 per cent).

11

Country Overview

Thailand

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Thailand

Overview

Thailand is the world's 20th most populous country and is home to approximately 66.19 million people.²³³ With approximately 12 per cent of the population being 65 years and older, Thailand's population is ageing faster compared to other Southeast Asian countries. By 2030, it is estimated that the urban population will be around 71 to 77 million people.²³⁴

Young people in the 15 to 24 age cohort account for around 8.5 million or 12.82 per cent of Thailand's total population. The share of young males is approximately 2 per cent higher than that of females.²³⁵ The COVID-19 crisis has resulted in employment challenges for Thailand's youth, offsetting the improvements in pre-pandemic trends. According to the ILO's Thailand labour Market Update, youth employment was reduced by 7 per cent in the first quarter of 2021, with an increased unemployment rate among young men and women

in the same period at 6 per cent and 8 per cent, respectively.²³⁶ The country's youth also suffer from a lack of social safety net, considering that more than half of the workforce is engaged in the informal sector.²³⁷ These issues have been further exacerbated by the global pandemic as evidenced by increased physical and mental health concerns, learning disruptions, and a lack of access to social support and protection services among young people.²³⁸

²³³ Thailand Board of Investment. (2020). *Demographic*, in <https://www.boi.go.th/index.php?page=demographic>

²³⁴ World Bank. (2021). *Climate risk country profile Thailand*, in https://climateknowledgeportal.worldbank.org/sites/default/files/2021-08/15853-WB_Thailand%20Country%20Profile-WEB_0.pdf

²³⁵ Thailand Board of Investment.

²³⁶ ILO. (2021). *Thailand labour market update: Concern remains over the drawn out impact of COVID-19*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/briefingnote/wcms_829228.pdf

²³⁷ UNICEF. (2021). *Voices of youth and employers on youth employability in Thailand*. <https://www.unicef.org/thailand/media/6981/file/Voice%20of%20Youth%20and%20Employers%20on%20Youth%20Employability.pdf>

²³⁸ UNFPA. (2020). *Youth and COVID-19 in Thailand: Socioeconomic Impact of the Crisis*, in https://thailand.unfpa.org/sites/default/files/pub-pdf/youth_and_covid-19_summary_brief_en.pdf

Employment Landscape

COVID-19 has negatively affected the youth's employability in Thailand, especially their transition from school to work or between jobs. There were around 525,000 new graduates when the virus reached the country in 2020. However, the job market could only accommodate less than 5 per cent of these potential employees, making it more difficult for them to compete for jobs and secure employment.²³⁹

Both before and during the pandemic, labour market access has been challenging for young people with disabilities (PWDs) due to a scarcity of job opportunities and discriminatory practices.²⁴⁰

There is a general perception that young people with disabilities are perceived as being unable to help themselves, hence leading to the assumption that they are burdening the employers. This contradicts the stipulation under the Empowerment of Persons with Disabilities Act issued by the Thai government in 2007 mandating employers, owners, establishments, and state institutions to employ 1 PWD in every 100 non-PWD employees.²⁴¹ A high proportion of PWDs remain unemployed or fundamentally work in the agriculture sector, with women being employed less than men.²⁴²

Generally, there is also a mismatch between the skills that youth possess and those that employers seek.²⁴³ Current trends show that Thailand's youth are more likely to be employed in urban areas, showing a 13 percentage-point increase between 2010 and 2018. 2018 statistics also show that a considerable proportion of young people work in market services (36 per cent) and the agriculture sector (29 per cent). Young Thais are more likely to work for an employer than be self-employed, with evidence of an increase in employee status among youth by 7 per cent between 2010 and 2018.

According to Thailand's Department of Employment, the top six industries with the highest share of employment include wholesale (sale of goods or merchandise), accommodation, public administration, manufacturing, construction, and transportation. Wholesale, accommodation, and transportation industries were hit hardest during the pandemic, highlighting the need to incorporate innovation and digital transformation into Thai companies' business operations.

²³⁹ UNESCAP. (2021). *Co-payment hiring campaign - Thailand*, in <https://yptoolbox.unescapsdd.org/portfolio/co-payment-hiring-campaign-thailand/>

²⁴⁰ Aroonsrimorakot, S. et al. (2020). *Barriers in the employment of persons with disabilities*, in <https://ph02.tci-thaijo.org/index.php/jtir/article/download/240235/164261>

²⁴¹ If businesses or institutions do not adhere to such law, it is mandatory to contribute towards the National Disability Fund. Other alternatives include granting concessions, supporting the distribution of services or provision of products, or subcontracting PWDs. As a final notice, the government would issue a written order to seize the business' or institution's properties.

²⁴² Cheausuwantavee, T., and Keeratiphantawong, S. (2021). *Employment for persons with disabilities in Thailand: Opportunities and challenges in the labour market*.

²⁴³ ILO. (2021). *Young futuremakers Thailand – Promoting youth employability*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_781431.pdf

Skills Demand

According to the World Economic Forum (WEF), five of the top-ranking emerging jobs in Thailand require basic or advanced digital skills proficiency. Moreover, LinkedIn's 2020 Emerging Jobs Report revealed that the top 10 emerging jobs in Thailand are closely related to accelerated digitalisation. These include roles as a data scientist, back-end developer, data engineer, full-stack engineer, product owner, data analyst, user experience designer, talent acquisition specialist, digital marketing specialist, and front-end developer. Meanwhile, analytical skills, problem-solving, leadership, digital, creativity, and flexibility are also identified among the top 10 emerging skills.²⁴⁴

Based on the qualitative interviews with employers, soft skills and communication skills were found to be the top priority in the pandemic job market, albeit with a slight variation observed between sectors. For IT industries on the rise, operational abilities for coding and syntax become increasingly important to fill in the emerging digital roles mentioned above. For retail industries, the pandemic also caused an increased

focus on hiring IT persons to revamp software applications in support of their businesses instead of in-person operational staff.

In line with the skills demanded by the private sector in Thailand, Fig. 11.1 shows that interpersonal skills (e.g. leadership, teamwork, team management, social influence, and mentoring) and self-leadership (e.g. entrepreneurship, time-management, self-motivation and initiative, trustworthiness, and ability to work under pressure) have helped around two-thirds (76.6 per cent and 69.2 per cent, respectively) of young Thais to find employment. More than half of young people also perceive that cognitive (60.7 per cent) and basic digital skills (51.4 per cent) are helpful in obtaining a job. However, despite the fact that the top 10 emerging jobs in Thailand require advanced digital proficiency (e.g. web development and data analysis), more than two-thirds of the respondents (72 per cent) do not feel that such skills are instrumental in acquiring a job position.

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

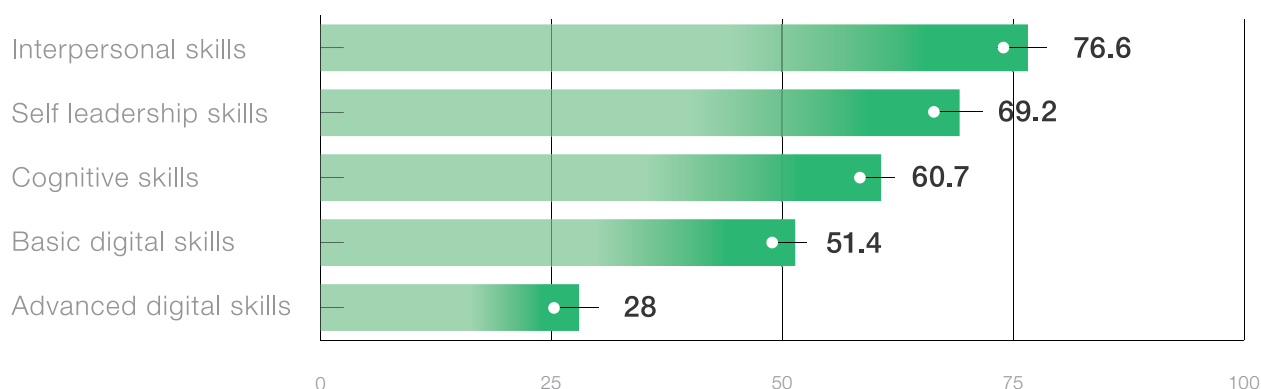


Figure 11.1. Skills Found to be Helpful in Finding a Job in Thailand

Source: LOKA Group (2022)

²⁴⁴ LinkedIn. (2020). *2020 Emerging Jobs Report*, in https://business.linkedin.com/content/dam/me/business/en-us/talent-solutions/emerging-jobs-report/LinkedIn_EJR_TH_final.pdf.

Skills Supply

Key findings on respondents' perceived levels of skill mastery suggest a potential mismatch between the demands from employers and young people's basic and advanced digital skills (Fig. 11.2). Around 69 per cent lack advanced digital skills, and around 41 per cent report not having any advanced digital skills at all. In addition, approximately a third (34.5 per cent) of the respondents perceive their mastery of basic digital skills as either low or inexistent. Many young people also believe that they possess high levels of interpersonal skills (around 93 per cent), even though employers continue to demand them from the workforce. A considerable number of the surveyed youth (more than 88 per cent) also report moderate to expert proficiency in self-leadership and cognitive skills.

Mastery of Future Skills

Share of respondents (%)

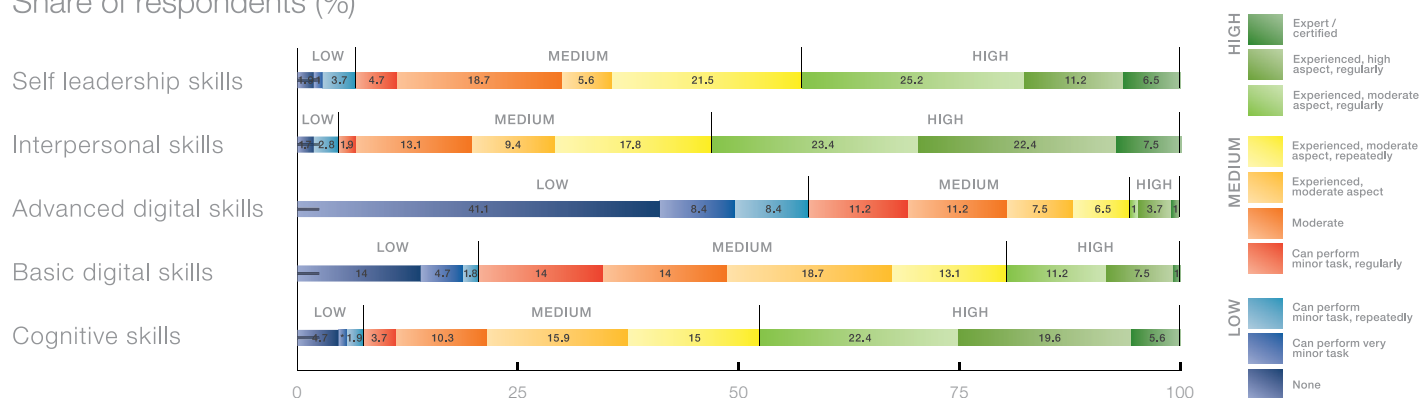


Figure 11.2. Mastery of Future Skills in Thailand

Source: LOKA Group (2022)

The qualitative data revealed that young people in Thailand are highly aware of the importance of developing mastery of these future skills (interpersonal, cognitive, and self-leadership), enabling them to understand and empathise with their organisations' goals. As the pressure increased for companies to sustain their operations during the pandemic (Box 11.1), gaining proficiency in the aforementioned skills – especially project management – will empower them to be agile and adapt to employers' needs and demands.

'Mastering project management is extremely necessary these days because companies (during the pandemic) want things fast and flexible. The hierarchy has become more horizontal and more project-based to keep up with the needs of the consumers today.'
— Youth respondent from Thailand

Box 11.1. Youth Insights on Skill Mastery in Thailand

Source: LOKA Group (2022)

Learning Behaviour

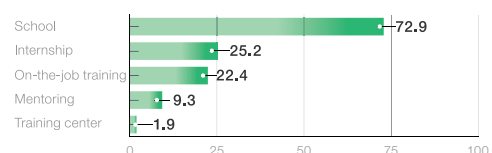
The survey findings suggest limited training participation among young people in Thailand and a tendency to acquire skills from school. A few others developed their skills through internships and on-the-job training, while only a few did so through mentorships and attending training centres. These findings align with the recently published UNICEF study, which found that Thai youth do not have adequate employment and career guidance from non-formal experiences. Furthermore, vague interpretations of legislative stipulations²⁴⁵ and financial barriers have stalled youth's chances to secure internships or on-the-job-training in private sectors.²⁴⁶

Of the 37.4 per cent who have participated in training, 90 per cent were organised by private institutions. This lack of participation in government-sponsored

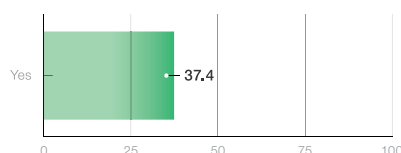
training is caused by a number of factors, including limited availability of courses and issues with accessing relevant information. Lastly, no policies are in place to provide specialised training and support for workers in sectors undergoing automation and structural change.²⁴⁷

As shown in Fig. 11.3, lack of information (28 per cent), lack of time (24.3 per cent), and lack of interest (23.4 per cent) are cited as the top three barriers to training attendance. The reasons for decreased motivation among young people include outdated curricula, lack of opportunities to apply learned skills, limited physical interaction, and limited internet access. Others (11.2 per cent)²⁴⁸ also face barriers related to distance since they have to move out of their cities of origin to attend these learning opportunities.

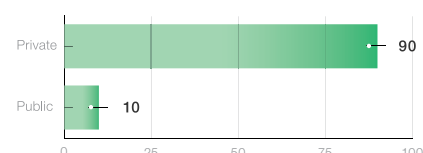
Thailand:
Means to Acquire Skills
Share of respondents (%)



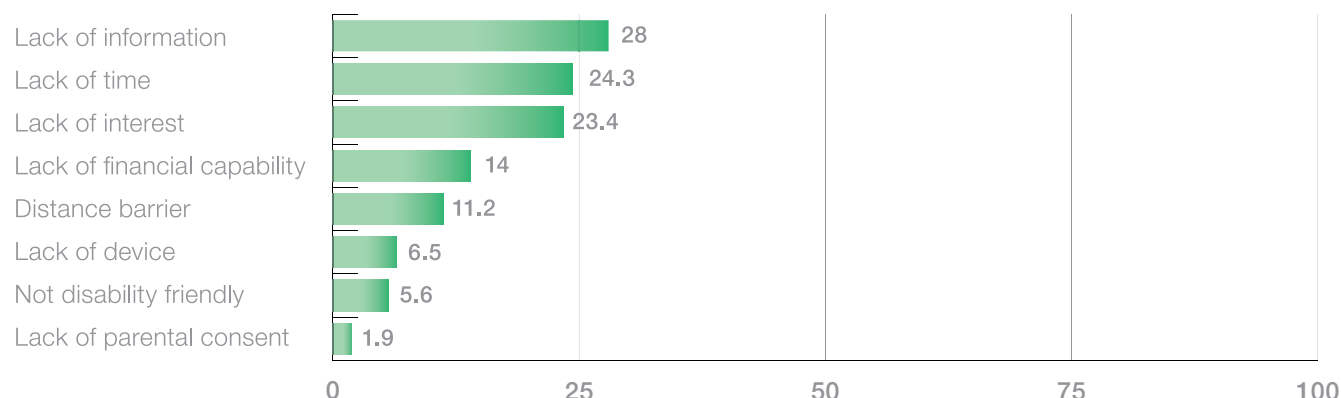
Thailand:
Training Participation
Share of respondents (%)



Thailand: Participation
in Training Institutions
Share of respondents (%)



Thailand: Challenges to Get Training



²⁴⁵ The Labour Protection Act in 1998 stipulated that child labour and exploitation of the youth aged 15 to 18 years is prohibited. However, as the detailed guidance is not available, government institutions may perceive providing internships or on-the-job-training as exploitative.

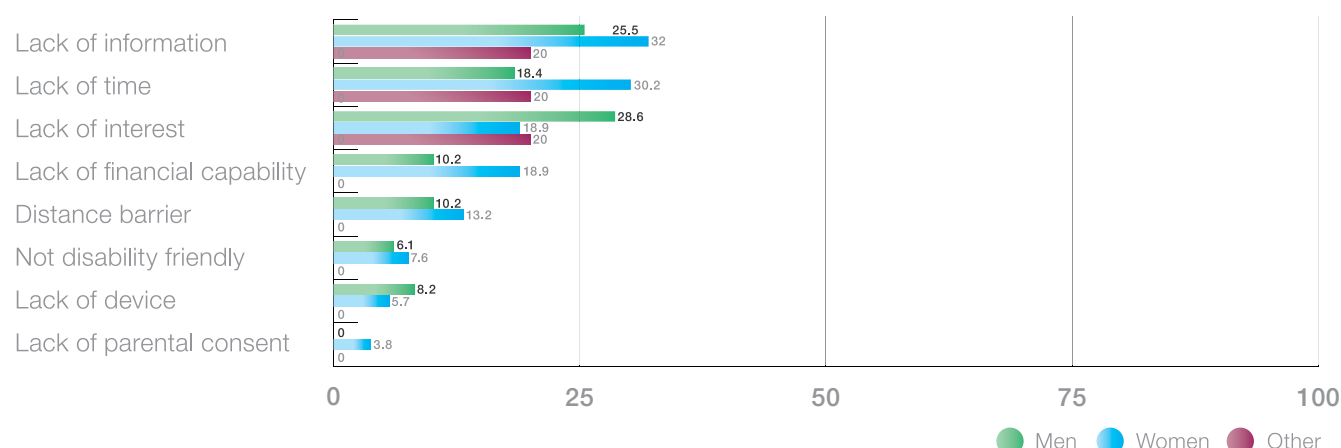
²⁴⁶ UNICEF. (2021). *Voices of youth and employers on youth employability in Thailand*, in <https://www.unicef.org/thailand/media/6981/file/Voice%20of%20Youth%20and%20Employers%20on%20Youth%20Employability.pdf>

²⁴⁷ OECD. (2021). *Thailand's education system and skills imbalances: Assessment and policy recommendations*, in [https://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP\(2020\)49&docLanguage=En](https://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP(2020)49&docLanguage=En)

²⁴⁸ LOKA Group. (2022).

Thailand: Challenges to Get Training

Share of respondents, by gender (%)



Thailand: Challenges to Get Training

Share of respondents, by disability status (%)

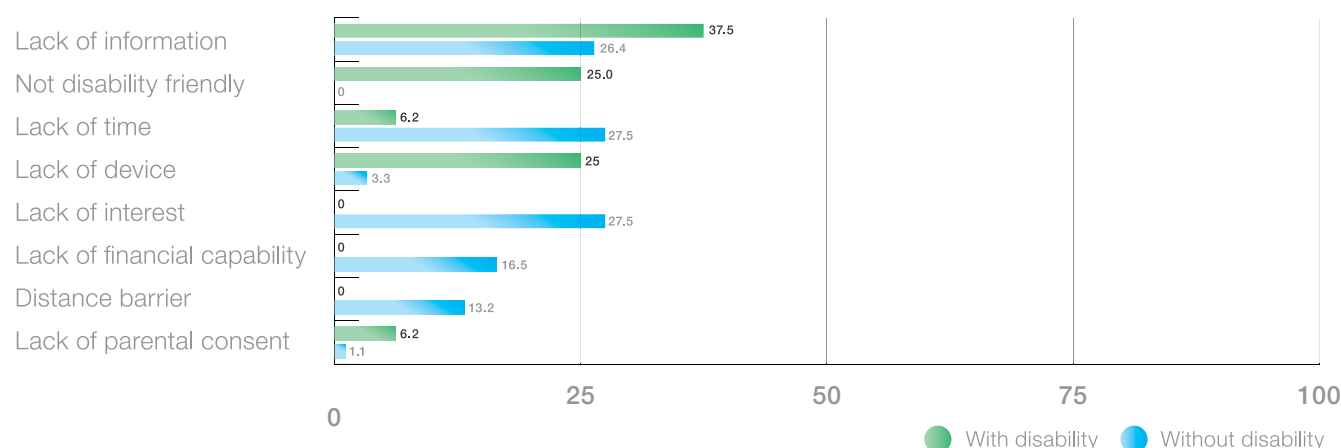


Figure 11.3. Learning Behaviour and Challenges in Thailand

Source: LOKA Group (2022)

The study found that women have a slightly greater interest (80 per cent) in attending training than men (less than 75 per cent), yet they receive less information, have less time, have less financial resources, face distance barriers, and lack the freedom to attend training (Fig. 11.3). Some women admit that despite the wide range of courses offered by training providers, the high enrolment costs coupled with the fact that the majority of the courses were mostly held online during the pandemic deterred them from participating in training, especially since there is no guarantee that they will benefit from upskilling or reskilling. A small percentage of women (3.8 per cent) also cited lack of parental consent as a barrier. Training-related challenges appear to be more pronounced for females partly due to the commonly held stereotypes and cultural barriers in Thailand.

For instance, around 70 per cent of female youth who are not in education, employment, and training (NEET) are household workers, potentially indicating a perception of females as suitable for domestic work. Teenage pregnancy and early marriage are also some of the reasons for which women face exclusion from learning and job opportunities.²⁴⁹

For young PWDs, lack of information appears to be the most commonly cited challenge (37.5 per cent). They also reported a lack of disability-friendly devices and training courses (e.g. no provisions for subtitles or sign languages in class), affecting 1 out of 4 young PWDs (25 per cent). This runs parallel with Thai training providers' responses, who admitted that there is a lack of training programmes specifically tailored for youth PWDs.

²⁴⁹ UNICEF. (2021). *Voices of youth and employers on youth employability in Thailand*.

Professional Aspirations and Skilling Needs

As shown in Fig. 11.4, young Thais mostly aspire to work in the media and communication sector (27.1 per cent), work independently as entrepreneurs (21.5 per cent), and get a job in the technology sector (19.6 per cent). In light of the pandemic and the possibility of mobility restrictions being enforced at any time, digital skills are seen by young people as a top priority when it comes to reskilling and upskilling for future jobs, including basic (64.5 per cent) and advanced digital skills (55.1 per cent). These are followed by self-leadership, cognitive, and interpersonal skills. The skilling needs' order of priority depicted in Fig. 11.5 may be explained by the fact that young people are already generally equipped with interpersonal, self-leadership, and cognitive skills, which they reported as instrumental in securing their current jobs.

Thailand: Job Aspirations

Share of respondents (%)

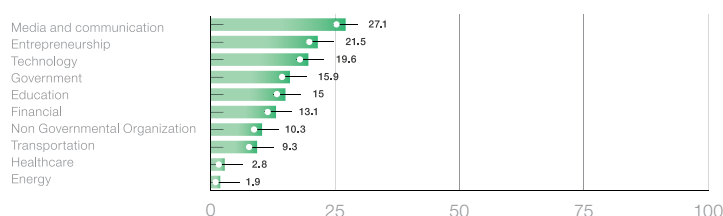


Figure 11.4. Job Aspirations in Thailand

Source: LOKA Group (2022)

Thailand: Upskilling and Reskilling

Share of respondents (%)

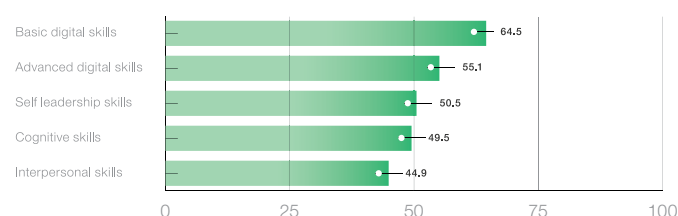


Figure 11.5. Skills to Upskill and Reskill in Thailand

Source: LOKA Group (2022)

12



Country Overview

Viet Nam

Overview | Employment Landscape |
Skill Demand | Skills Supply |
Learning Behaviour | Professional
Aspirations and Skilling Needs

Viet Nam

Overview

Viet Nam has a total population of 97 million in 2020.²⁵⁰ Of this number, over 23 million (or 25 per cent) are youth aged 16 to 30.²⁵¹

Young people have been disproportionately affected by the enforcement of restrictive policy measures as a result of the pandemic. Viet Nam's youth unemployment rate rose from 6.5 per cent pre-pandemic to 7.5 per cent in the second quarter of 2021, which is almost three times higher than the working-age unemployment rate.²⁵² 25 million students nationwide were affected by the massive school closures mandated by the government. Aside from anxiety caused by social and physical isolation, the pandemic also led to an increased online presence among young people, which in turn contributed to a rise in mental health problems and exposure to misinformation and disinformation.

The pandemic has also disproportionately disadvantaged women in the Viet Namese labour market. In the fourth quarter of 2019, the unemployment rate of both young men and women was at 6.4 per cent. In contrast to the decrease in young men's unemployment rate from 5.7 to 5.2 per cent in the third and fourth quarters of 2020, a slight increase from 9.1 to 9.2 per cent was noted for young women.²⁵³ Compared to men, women are also generally found in lower-quality employment where they earn less despite comparable working hours. They are also overrepresented in vulnerable employment (e.g. family work) and underrepresented in decision-making jobs.

Employment Landscape

The labour force in Viet Nam is concentrated in different clusters across the country, such as Hanoi metro area, Hai Phong metro area, Da Nang metro area, and Ho Chi Minh. The main industries are manufacturing (16 per cent of GDP), services (51 per cent), and agriculture (14 per cent).²⁵⁴

A recent study by Mulema et al. (2021) found that young people are more likely to be unemployed than adults. Aside from the challenge of job creation, there are also existing difficulties in equipping young people with relevant skills for the growing service and manufacturing sectors.²⁵⁵ Viet Nam's youth are

²⁵⁰ World Bank. (2020). *Vietnam population*, in <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=VN>

²⁵¹ UNFPA. (2020). *Report on Vietnamese youth 2015-2018*, in <https://vietnam.unfpa.org/en/publications/report-vietnamese-youth-2015-2018>

²⁵² General Statistics Office. (2021). Report on impact of COVID-19 pandemic on labour and employment of the second quarter of 2021, in <https://www.gso.gov.vn/en/data-and-statistics/2021/07/report-on-impact-of-covid-19-pandemic-on-labour-and-employment-of-the-second-quarter-of-2021/>

²⁵³ ILO. (2021). *Gender and the labour market in Viet Nam*, in https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-hanoi/documents/publication/wcms_774434.pdf

²⁵⁴ Vietnam Briefing. (2021). *Q&A: Understanding Vietnam's labour market and key HR compliance*, in <https://www.vietnam-briefing.com/news/understanding-vietnams-labour-market-key-hr-compliance.html/>

²⁵⁵ Mulema, J. et al. (2021). *Barriers and opportunities for the youth engagement in agribusiness: empirical evidence from Zambia and Vietnam*, in <https://www.tandfonline.com/doi/full/10.1080/09614524.2021.1911949>

predominantly employed in the informal sectors where they are exposed to unsafe and unstable working environments, low income, long working hours, and limited access to social protection. According to the ILO, in 2016, 60 per cent of young people in the country are earning in these sectors.²⁵⁶ This number remained the same in 2020 as reported by UNICEF.²⁵⁷

When the government issued a social distancing order due to the pandemic, workers in the informal sector such as street vendors, scrap dealers, garbage collectors, and informal and online motorbike and car taxi drivers were immediately affected.²⁵⁸ Adults and young people working in these sectors struggled to make a living. As they were dependent on daily income with little savings, sheltering at home led to income losses. In addition, the government admits that many young people are struggling with career orientation and acquiring employability skills that match the labour market demands for decent work opportunities.²⁵⁹

As Lau et al. (2016) explain, Viet Nam is also undergoing a shift from a factor-driven to an efficiency-driven economy, where low-productivity manual jobs are being overtaken by skill-intensive non-manual jobs.²⁶⁰ However, young people's qualifications struggle to match employers' requirements, while firms also tend to value experience over educational attainment.²⁶¹ Upskilling and reskilling through internships, apprenticeships, work placements, and other work-integrated learning are necessary to bridge the skills gap and develop young people's readiness to meet labour demands.²⁶²

²⁵⁶ ILO. (2017). *Viet Nam's 18 million non-agricultural workers are in informal employment*, in https://www.ilo.org/hanoi/Informationresources/Publicinformation/newsitems/WCMS_579924/lang--en/index.htm

²⁵⁷ UNICEF. (2020). *Research report: Assessment on employability skills gaps and good practices by business to upskill marginalised and vulnerable young people*, in <https://onedrive.live.com/?authkey=per%2021AIH9Le9no1Ar%20per%202DBs&cid=A375D03D65CAB9F3&id=A375D03D65CAB9F3%20per%202114754&parld=A375D03D65CAB9F3%20per%202114753&o=OneUp>

²⁵⁸ Center for Development and Integration. (2021). *SÁNG KIẾN HỖ TRỢ VỀ AN SINH XÃ HỘI CHO NGƯỜI LAO ĐỘNG BỊ ẢNH HƯỞNG BỞI COVID-19*, in http://cdvietnam.org/wp-content/uploads/2021/06/2021619_s%20per%20C3%20per%20A1ng-ki%20per%20E1%20per%20BA%20per%20BFn-h%20per%20E1%20per%20BB%20per%2097-tr%20per%20E1%20per%20BB%20per%20A3-ASXH-cho-NL%20per%20C4%20per%2090-trong-dich-covid-2.pdf

²⁵⁹ UNICEF. (2020). *Businesses in Viet Nam are looking for creativity, teamwork and active listening skills in their future young employees*, in <https://www.unicef.org/vietnam/press-releases/businesses-viet-nam-are-looking-creativity-teamwork-and-active-listening-skills>

²⁶⁰ Lau, S.K. et al. (2016). *An exploratory study of expectation in IT skills in a developing nation: Vietnam*, in <https://ro.uow.edu.au/cgi/viewcontent.cgi?article=6963&context=eispapers>

²⁶¹ ILO. (2015). *Labour market transitions of young women and men in Viet Nam*, in https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms_347256.pdf

²⁶² UNICEF. (2020). *Research report: Assessment on employability skills gaps and good practices by business to upskill marginalised and vulnerable young people*.

Skills Demand

A UNICEF report in 2020 found that skills in the technology infrastructure and services domain are in high demand in the ICT sector.²⁶³ The World Bank also reports that 8 of 10 of the fastest-growing jobs require higher-level knowledge and a broader range of skills, including in manufacturing and modern services such as telecommunication, finance, and transport.²⁶⁴ As cited in the UNICEF report, Lau et al. (2016) project an increase in skills demand in the technology infrastructure and services sectors. Khanh & Winley (2018) further explain that specific skills such as designing and analysing networks and systems, providing security or support services, and in combination with communication and problem-solving abilities are highly valued by industries.²⁶⁵

In line with industry demand, the recent adoption of the latest national development strategy by Viet Nam's Party Congress in February 2021 showcases the country's commitment to leading digital transformation.²⁶⁶ The strategy establishes its focus on the digital sector as the country's engine of growth over the next decades to fulfil its ambition of becoming a high-income economy by 2045,

projecting the creation of an estimated 10 million new jobs. The General Department of Vocational Training under the Ministry of Labour, War Invalids and Social Affairs has been focusing on developing the project 'Improving Vietnamese Labourers' Skills', which seeks to enhance the labour market outcomes and develop future-ready skills of young people in the country. Overall, there is a need to focus on high specialisation, professionalism, flexible adaptation, and creativity in the workforce, as well as to develop TVET facilities and systems that adequately respond to the population's learning demands.²⁶⁷

Following a survey on the skills demanded in the labour market from the perspective of young people in Viet Nam, it was found that more than 1 out of 2 respondents reported that self-leadership (70 per cent), interpersonal (55 per cent), and cognitive (51 per cent) skills have been helpful for them to acquire jobs. As depicted in Fig. 12.1, a smaller share of young people sees the usefulness of basic and advanced digital skills in finding employment at 30 per cent and 17 per cent, respectively.

²⁶³ *Ibid.*

²⁶⁴ World Bank. (2020). *Vibrant Vietnam: Forging the foundation of a high-income economy*, in <https://openknowledge.worldbank.org/handle/10986/33831>

²⁶⁵ Khanh, T.N.N. and Winley, G. K. (2018). *An investigation of ICT knowledge and skills in Vietnam*, in <https://onlinelibrary.wiley.com/doi/epdf/10.1002/isd2.12023>

²⁶⁶ Moriseet, J. (2021). *Digital transformation in Vietnam: Skills must transform too*, in <https://blogs.worldbank.org/eastasiapacific/digital-transformation-vietnam-skills-must-transform-too>

²⁶⁷ Nhan Dan Online. (2022). *Developing essential skills for youth following pandemic*, in <https://en.nhandan.vn/society/item/10146302-more-drastic-measures-needed-to-deal-with-the-fourth-wave-of-covid-19.html?PageSpeed=noscript>

Skills Found to be Helpful in Finding a Job

Share of respondents (%)

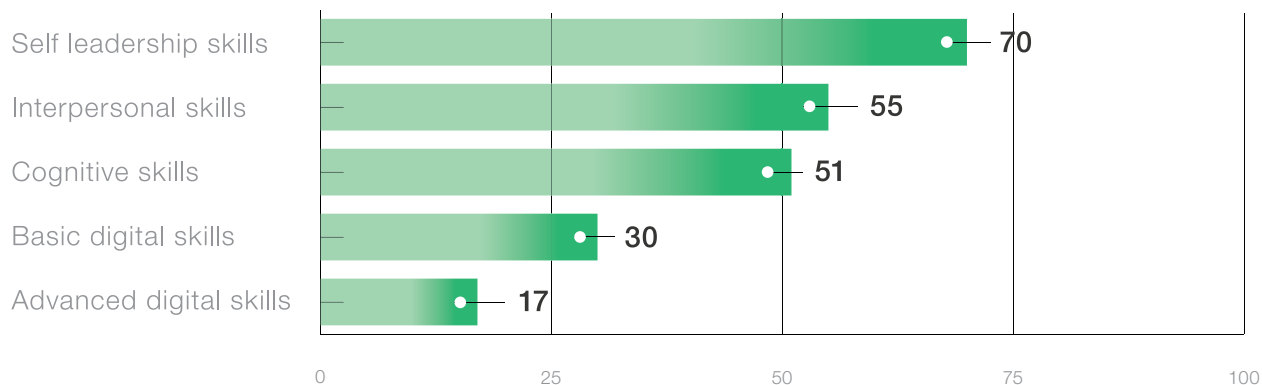


Figure 12.1. Skills Found to be Helpful in Finding a Job in Viet Nam

Source: LOKA Group (2022)

Skills Supply

The study's findings suggest that there is a huge potential gap between young people's current skills proficiency and the ICT ambitions pursued by Viet Nam. As shown in Fig. 12.2, 43 per cent of Vietnamese youths have no advanced digital skills at all, while an additional 37 per cent are in the low proficiency spectrum in this skill domain. Additionally, a total of 44 per cent of the respondents reported having none to low proficiency in basic digital skills. Other than that, young people in Viet Nam have moderate to high self-leadership (76 per cent), interpersonal (73 per cent), and cognitive skills (70 per cent).

Mastery of Future Skills

Share of respondents (%)

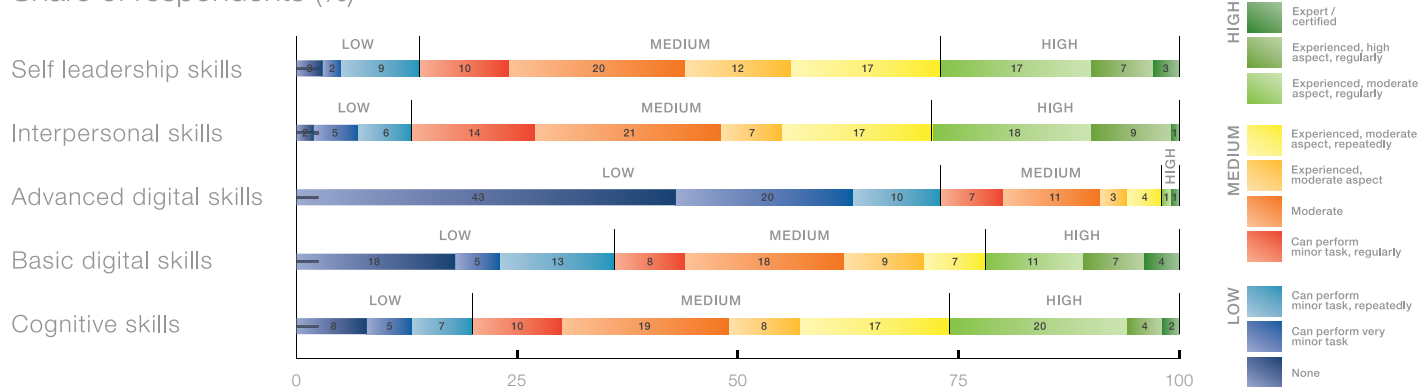


Figure 12.2. Mastery of Future Skills in Viet Nam

Source: LOKA Group (2022)

Learning Behaviour

In Viet Nam, the majority of youths received their skills by attending formal education (66 per cent) or mentoring (54 per cent). Around 1 out of 3 gained skills from on-the-job training (37 per cent), and a smaller proportion of youths acquired their skills from internships (22 per cent) and training centres (13 per cent). It was also found that most young people in Viet Nam have not yet participated in any training activities (62 per cent). Of youths who have done so, 60.5 per cent attended programs offered by private institutions, and 39.5 benefited from government-sponsored training.

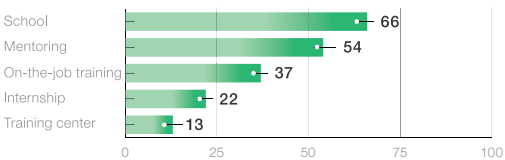
The main challenges to training participation being faced by youths are lack of interest (18 per cent), lack of time (13 per cent), and lack of financial capability (13 per cent). Less than 1 out of 10 youths cited lack of device (8 per cent), distance barriers (7 per cent), and lack of disability-friendly training (3 per cent). The informants also explained that attending training online is perceived to be ineffective due to a lack of practical lessons.²⁶⁸ Some functionality skills training for underserved youth, such as refrigerator repair services, cooking, and spa services, would require hands-on learning to be effective. Particularly for underserved youth in rural areas, online training

remains a challenge due to limited infrastructure and resources such as personal computers.

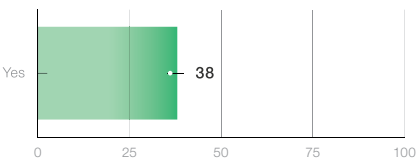
Evidence from the study shows that young women are more likely to face financial and distance barriers to training. Nearly 1 out of 4 women cited their inability to afford training (22.5 per cent), while this barrier only stood at 6.9 per cent for men. The same trend can be observed regarding proximity issues, whereby a higher share of women (10 per cent) appear to experience this barrier than men (5.2 per cent).

Among young persons with disabilities (PWDs), nearly 1 out of 5 (18.8 per cent) cited the lack of disability-friendly training activities as a major barrier to attending training (Fig. 12.3). In addition, there are no existing approaches to map the needs of PWD learners to enable training providers to deliver tailored programmes. For instance, pedagogical tools such as the braille alphabet for students with visual impairments and the sign language for those with hearing and speech impairments could be made available, while adapted teaching-learning techniques would be appropriate for those with intellectual disabilities.

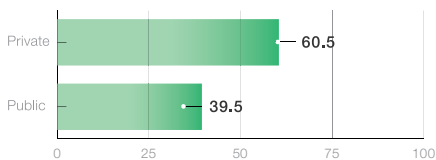
Viet Nam:
Means to Acquire Skills
Share of respondents (%)



Viet Nam:
Training Participation
Share of respondents (%)



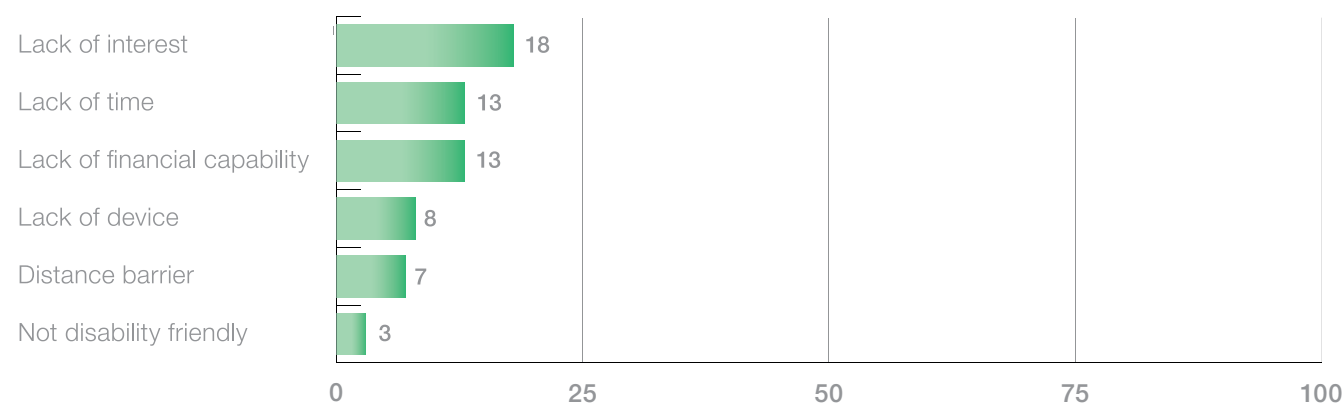
Viet Nam: Participation
in Training Institutions
Share of respondents (%)



²⁶⁸ LOKA Group. (2022).

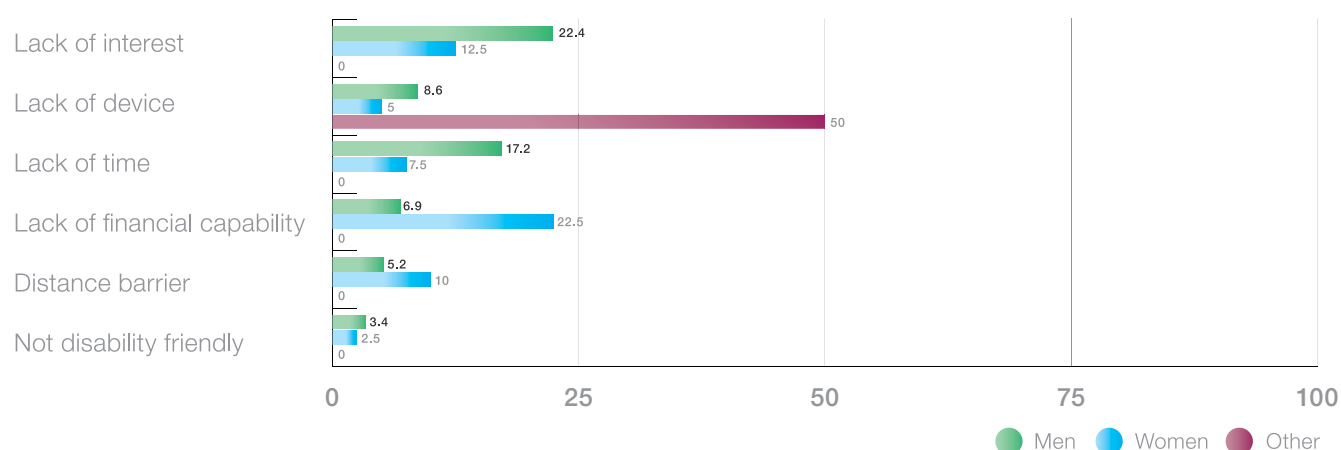
Viet Nam: Challenges to Get Training

Share of respondents (%)



Viet Nam: Challenges to Get Training

Share of respondents, by gender (%)



Viet Nam: Challenges to Get Training

Share of respondents, by disability status (%)

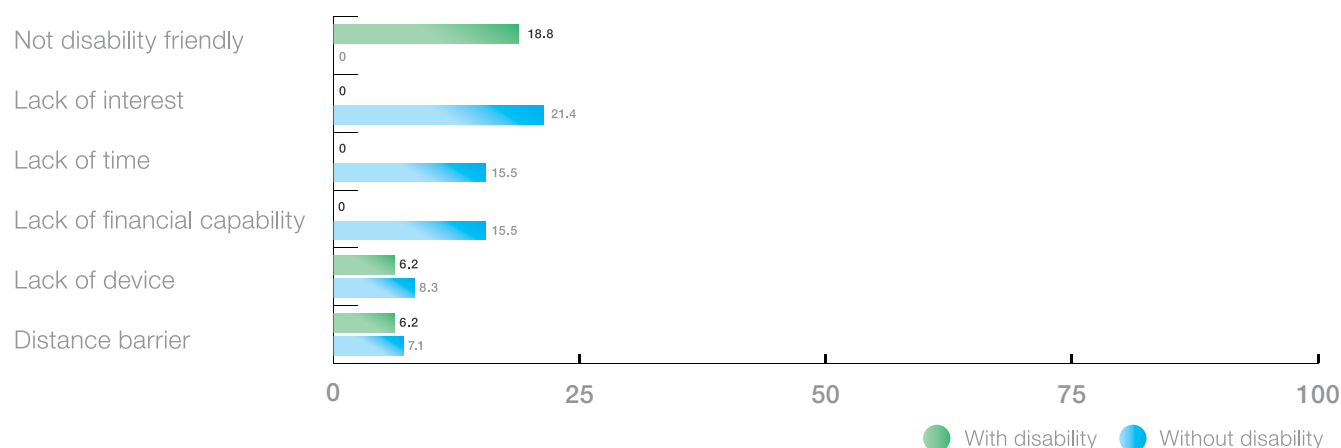


Figure 12.3. Learning Behaviour and Challenges in Viet Nam

Source: LOKA Group (2022)

Professional Aspirations and Skilling Needs

As shown in Fig. 12.4, nearly 1 out of 2 young people in Viet Nam aspire to become entrepreneurs (43 per cent), followed by working in the media and communication (37 per cent), education (22 per cent), technology (20 per cent), NGO and government (17 per cent), and financial sectors (11 per cent). Only a small proportion of the respondents seek careers in transportation (8 per cent) and energy (5 per cent).

Viet Nam: Job Aspirations

Share of respondents (%)

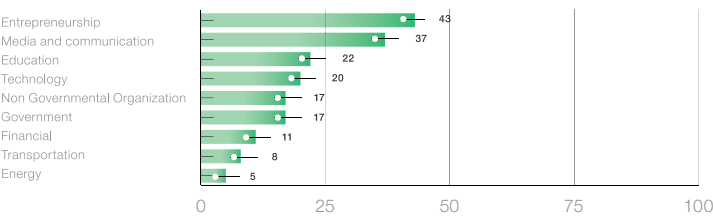


Figure 12.4. Job Aspirations in Viet Nam

Source: LOKA Group (2022)

Viet Nam: Upskilling and Reskilling

Share of respondents (%)

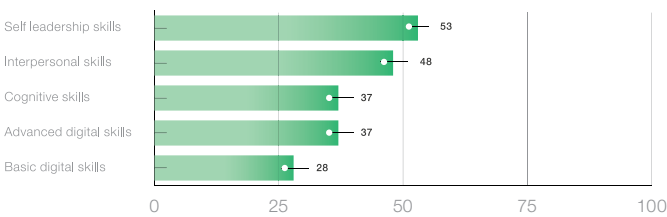


Figure 12.5. Skills to Upskill and Reskill in Viet Nam

Source: LOKA Group (2022)

While there is an increasing demand for digital skills in the country, Fig. 12.5 shows that these were the least cited among the skills needing upskilling. Instead, around half of the young people surveyed would like to further gain self-leadership (53 per cent) and interpersonal skills (48 per cent). This is followed by the demand from youth for reskilling in cognitive and advanced digital skills (37 per cent) and basic digital skills (28 per cent).

Recommendation

Recommendations

The study aimed to map the employment landscape for young people in ASEAN, including regional and country-level employment trends during the pandemic, the skills demand and supply among young people, their opportunities and barriers to access learning and skilling opportunities, and their aspirations and needs for future work. The analysis primarily focused on underserved youth, highlighting the importance of inclusivity and shared prosperity during the post-pandemic economic recovery. As identified in the report, the pandemic has caused unemployment rates to surge and exceed pre-pandemic figures in Southeast Asia,²⁶⁹

disproportionately affecting youth and underserved groups. Considering the forms of disadvantage they continue to face in the labour market, this report highlights three main recommendations to improve underserved youth in ASEAN's employment participation in light of the pandemic situation and their future work aspirations, thus contributing to the overall development of the region post-pandemic.

1. Tailored training menus for the underserved youth should be rooted in communities and supported by the government

The challenges to accessing training for underserved youth, be it for those with or without disability, have been found to stem from lack of information, limited financial capacity, issues with parental support, and lack of proximity to training centres. Training programmes should then be designed with these gaps in mind. They should also be future-oriented and sensitive to the importance of developing digital skills, especially for fast-growing job roles. While the world predicts that advanced STEM skills will increasingly become an asset, it is paramount to equip underserved youth with basic and foundational digital skills as a stepping stone to securing employment. Furthermore, there is an increasing demand among employers for youth to demonstrate high levels of proficiency in interpersonal and creativity skills, which would need to be addressed in formal and non-formal forms of training.

It is also equally crucial to adopt a community-centred approach to training design and provision. This is especially important for underserved youth, who have traditionally been on the sidelines of training provisions. By involving the community, familiarity and trust can be built between educators, community leaders, and parents, thereby overcoming the barriers related to parental support and proximity that emerged in the data.

Finally, as more than 70 per cent of youth access training from private providers who may impose higher fees, the government needs to penetrate this market to safeguard and guarantee training access for underserved youth. The involvement of public bodies in training programmes can also enhance their awareness of potential skills mismatch, which in turn can lead to adjustments in formal education curricula to make them more relevant and responsive. Limited access to devices can also be bridged by government programmes. In short, greater involvement and investment in non-formal training by governments could potentially address the interlocking issues being faced by underserved ASEAN youth in gaining skills for employment.

²⁶⁹ ILO. (2022). *World employment and social outlook trends 2022*, in https://www.ilo.org/wcmsp5/groups/public/-/dgreports/-/dcomm/-/publ/documents/publication/wcms_834081.pdf

2. The lack of social protection in the informal sector needs to be properly addressed

Recent statistics show that youth holds a considerable share of employment in high informality sectors most affected by the pandemic such as hospitality and retail. They are also widely employed as frontline workers who, while having played an important role during the pandemic, remain subject to poor social protection. Given this context and a strong desire among young people to engage in entrepreneurial activity as evidenced by the study data, the issue of providing adequate social protection has become even more relevant.

While most studies tend to view youth's integration into the formal sector as the solution, it is often more difficult to implement. Hence, we recommend that governments pay closer attention to the needs of informal workers and provide them with comprehensive social protection. The pandemic offers an opportunity to address the gap in social protection, especially given the critical role of informal workers in providing essential services in the COVID-19 crisis. As outlined by ASEAN's Regional Study on Extension of Social Security to Workers in Informal Employment in the ASEAN Region,²⁷⁰ there is no one-size-fits-all approach to social protection. A combination of contributory and non-contributory social protection for youth who work in informal employment should be adjusted to the national context. For instance, countries with a comprehensive employment insurance framework already in place

(such as Indonesia, Myanmar, and Thailand) may work towards ensuring access to social protection schemes by simplifying legal barriers for underserved communities to access the insurance; streamlining the registration process for access to insurance, preferably by combining online and offline modes that take the digital gap into account; and improving the data collection on informal employers and workers to ensure appropriate targeting. In this regard, governments may collaborate with educational institutions and local communities to build robust databases identifying youths working in the informal sector.

Secondly, given the scarcity of resources to finance the schemes, expanding the coverage of social protection may be adopted through non-contributory government measures financed by the national tax. For instance, informal economy workers in Indonesia can only access work injury and pension funds voluntarily through *BPJS Ketenagakerjaan*.²⁷¹ Meanwhile, a broader coverage is needed for informal workers in Myanmar, who are only minimally covered by the Workmen's Compensation Scheme under the Social Security Board (SSB). Enhanced social protection for informal workers by providing maternity, disability, old age, unemployment, and underemployment support would equip them to participate in training and thereby expand their livelihood options in the case of an unforeseen event or a sudden layoff.

3. Gender-responsive policies may uplift the opportunities for young women to earn livelihoods.

Underserved young women remain mostly alienated from employment and job training due to care burdens and other expected domestic roles.

Providing sufficient incentives for businesses to allow flexible working arrangements may increase young women's chances of getting employed. Examples include the provision of parental leave for young women who have married, working from home (WFH), and promoting awareness and advocacy among families to work against the gender gap around caring duties.

²⁷⁰ ILO. (2019). *Regional study extension of social security to workers in informal employment in the ASEAN region*.

²⁷¹ ILO. (2020). *Social protection situation: Indonesia*, in <https://www.social-protection.org/gimi/ShowCountryProfile.action?iso=ID>



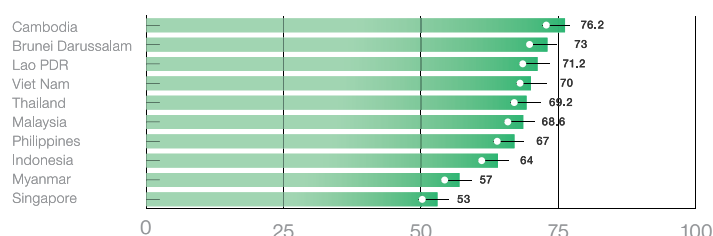
Annex

Annex A.

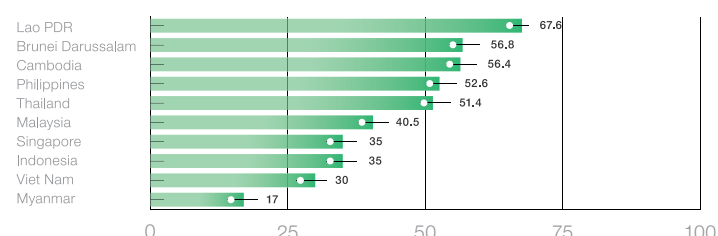
Skills and Comparison Breakdown in ASEAN

A. Skills believed to be helpful in finding a job

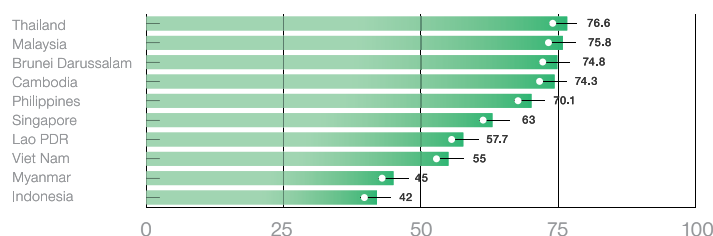
ASEAN : Self-leadership Skills Believed to be Helpful in Obtaining a Job
Share of respondents (%)



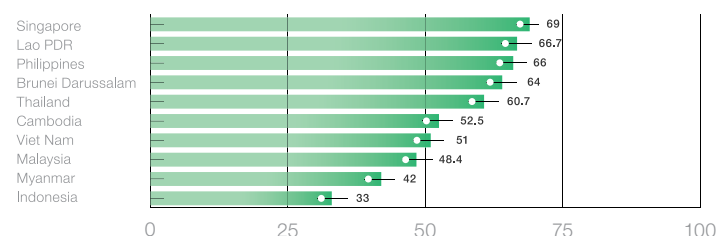
ASEAN : Basic Digital Skills Believed to be Helpful in Obtaining a Job
Share of respondents (%)



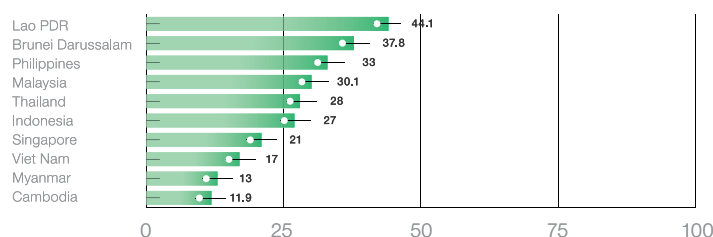
ASEAN : Interpersonal Skills Believed to be Helpful in Obtaining a Job
Share of respondents (%)



ASEAN : Cognitive Skills Believed to be Helpful in Obtaining a Job
Share of respondents (%)



ASEAN : Advanced Digital Skills Believed to be Helpful in Obtaining a Job
Share of respondents (%)

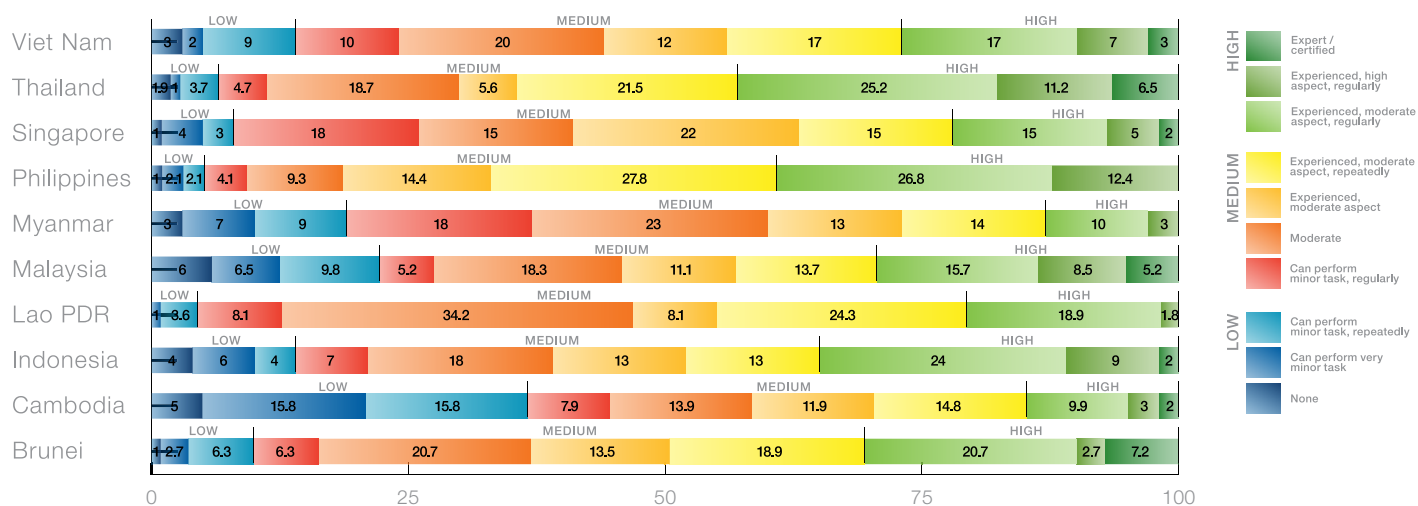


source: LOKA Group

B. Skills Mastery

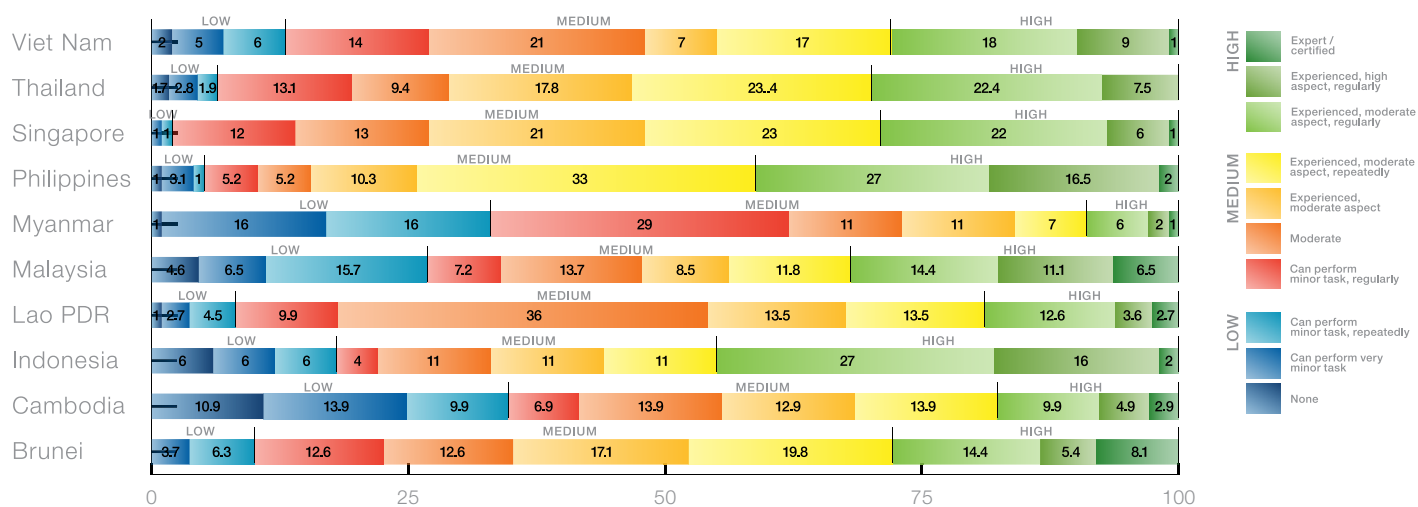
ASEAN: Proficiency in Self-Leadership Skills

Share of respondents (%)



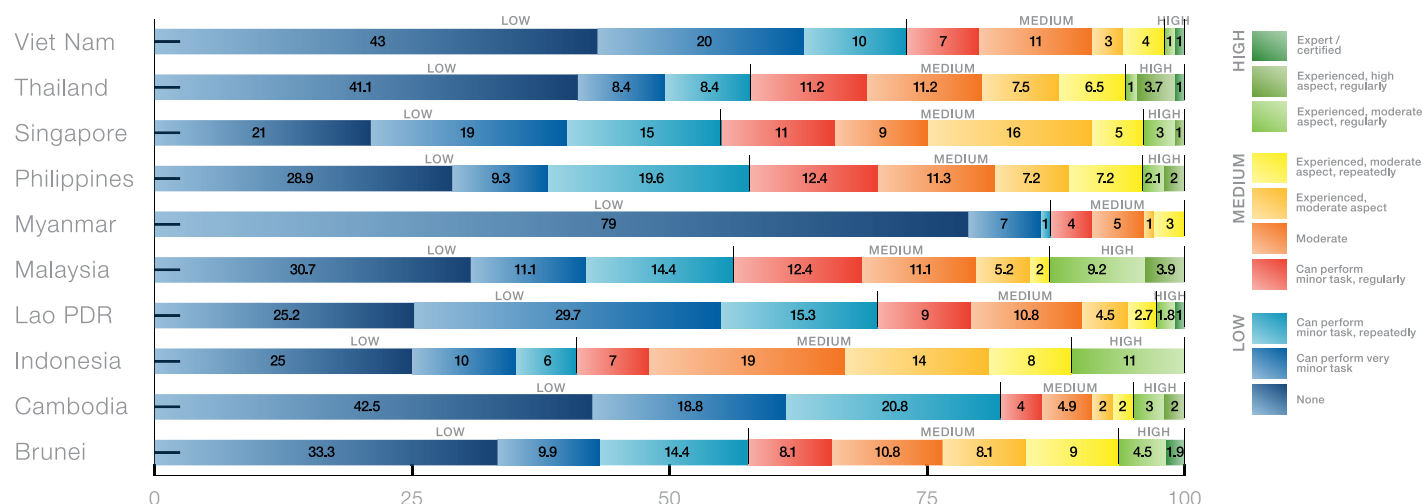
ASEAN: Proficiency in Interpersonal Skills

Share of respondents (%)



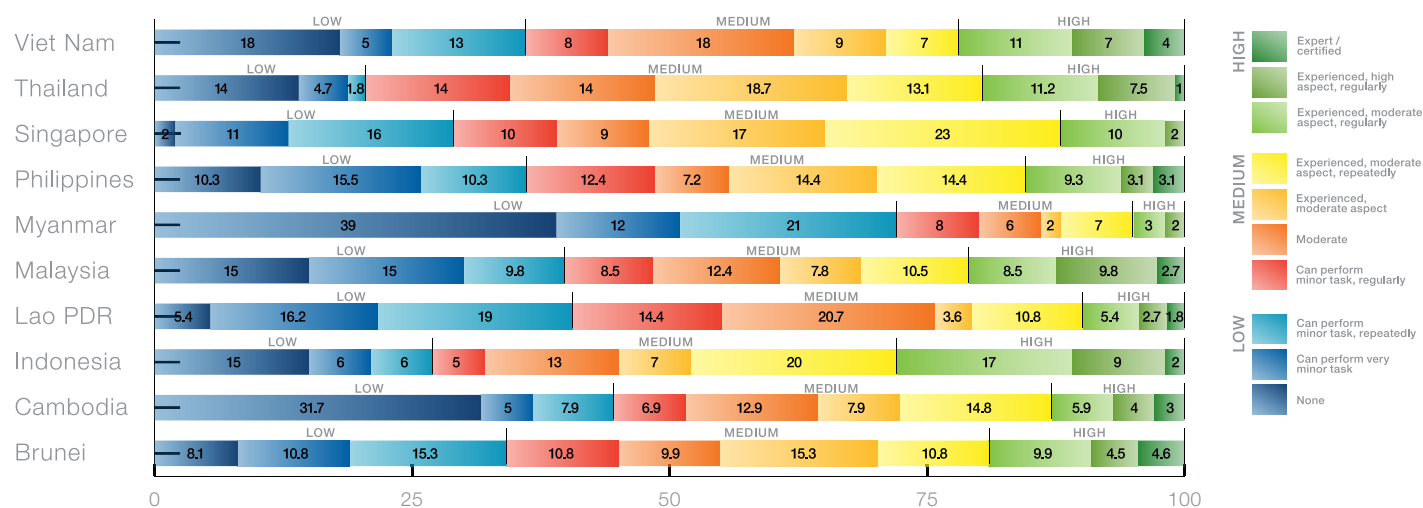
ASEAN: Proficiency in Advanced Digital Skills

Share of respondents (%)



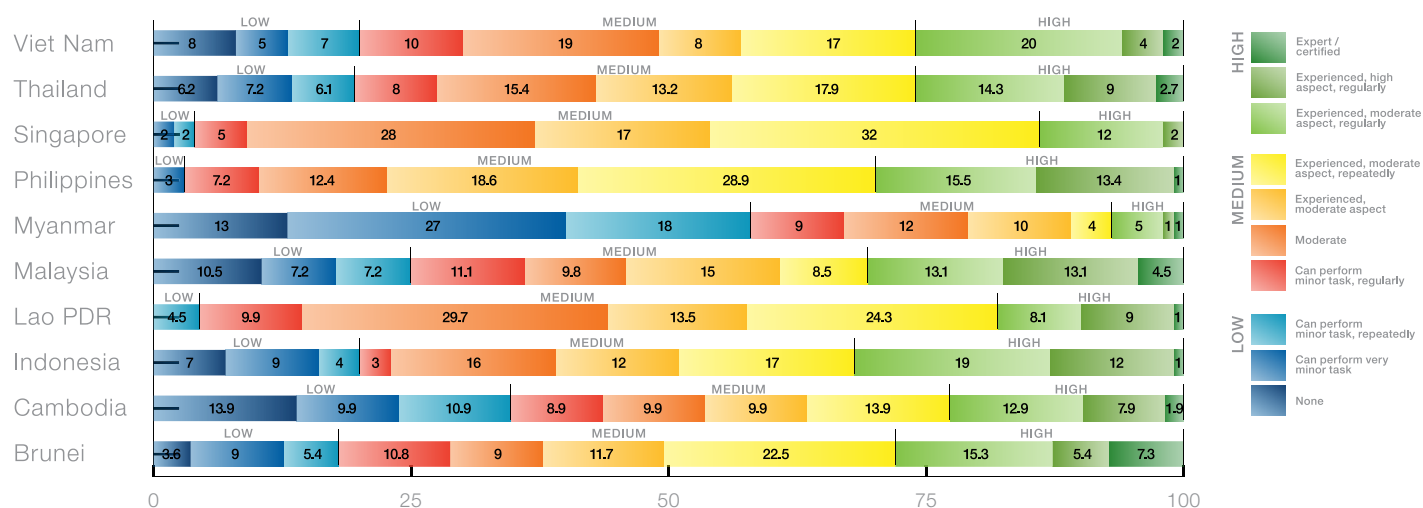
ASEAN: Proficiency in Basic Digital Skills

Share of respondents (%)



ASEAN: Proficiency in Cognitive Skills

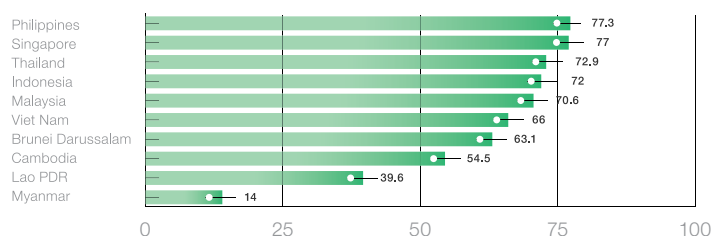
Share of respondents (%)



C. Means of Skilling and Training Participation

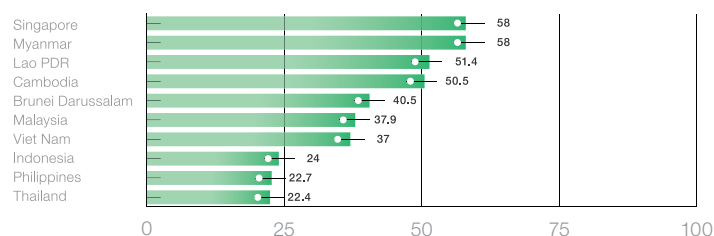
ASEAN: Skill Acquisition Through School

Share of respondents (%)



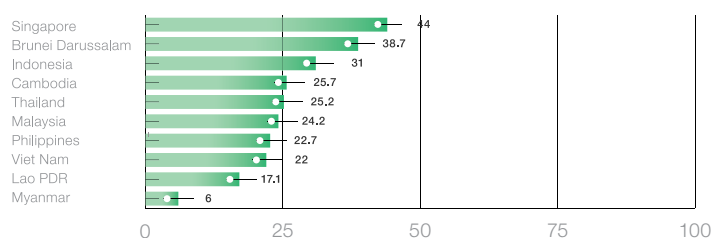
ASEAN: Skill Acquisition Through On-The-Job Training

Share of respondents (%)



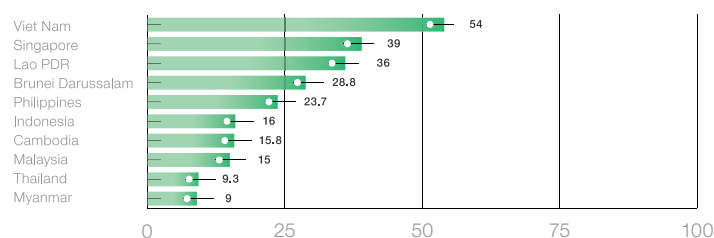
ASEAN: Skill Acquisition Through Internship

Share of respondents (%)



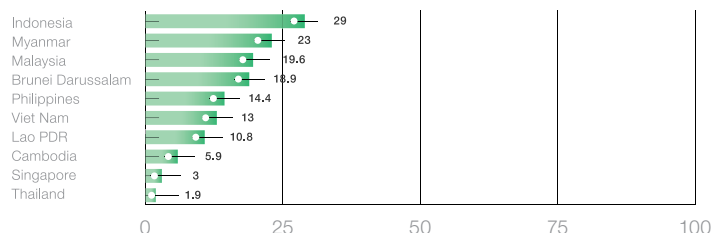
ASEAN: Skill Acquisition Through Mentoring

Share of respondents (%)



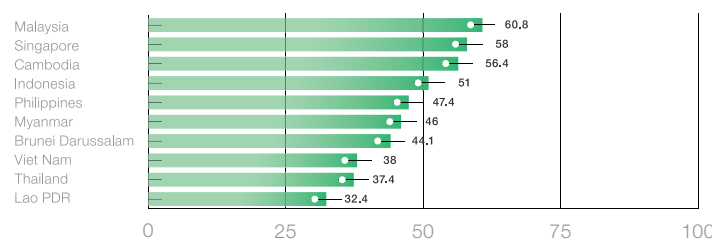
ASEAN: Skill Acquisition Through Training Center

Share of respondents (%)



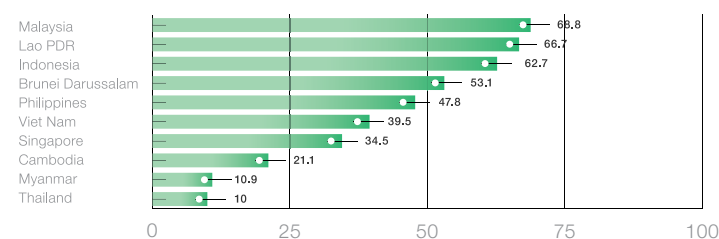
ASEAN: Training Participation

Share of respondents (%)



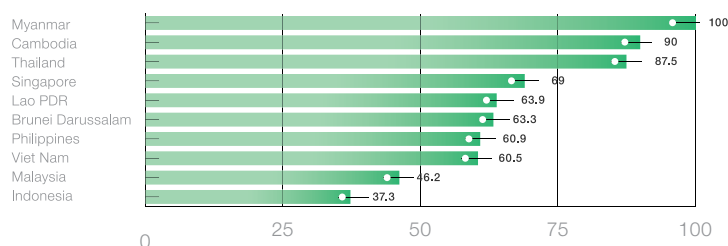
ASEAN: Training Participation in Public Institutions

Share of respondents (%)



ASEAN: Training Participation in Private Institutions

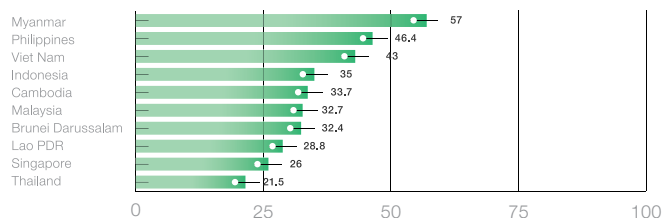
Share of respondents (%)



D. Job Aspirations

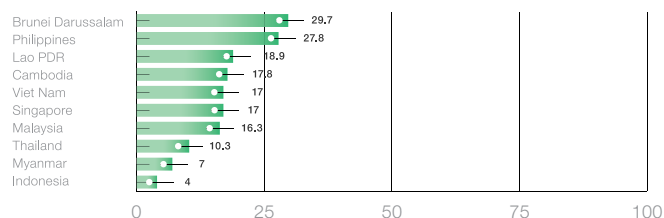
ASEAN: Job Aspirations in Entrepreneurship

Share of respondents (%)



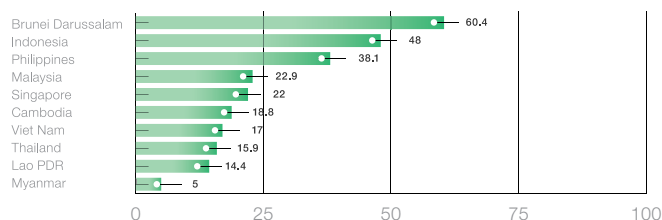
ASEAN: Job Aspirations in Non Governmental Organization

Share of respondents (%)



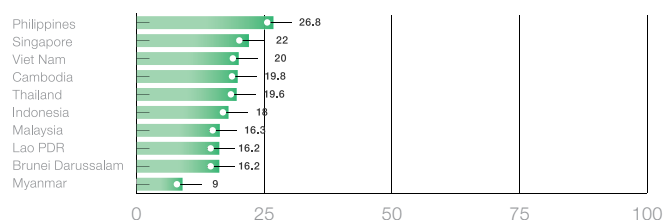
ASEAN: Job Aspirations in Government

Share of respondents (%)



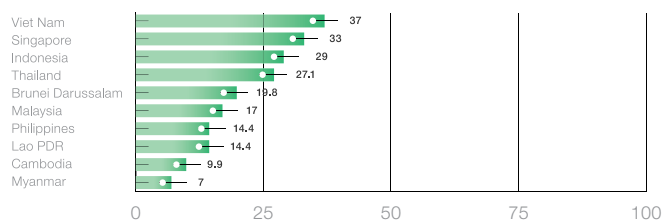
ASEAN: Job Aspirations in Technology

Share of respondents (%)



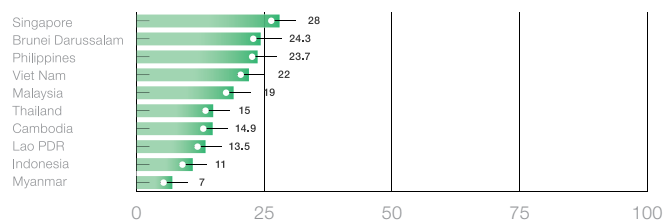
ASEAN: Job Aspirations in Media and Communication

Share of respondents (%)



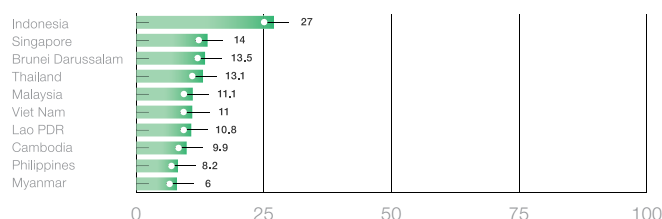
ASEAN: Job Aspirations in Education

Share of respondents (%)



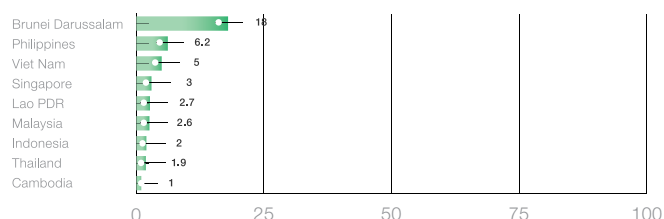
ASEAN: Job Aspirations in Finance

Share of respondents (%)



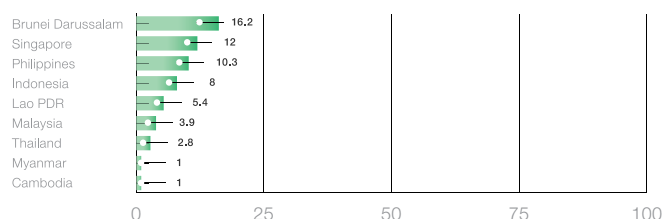
ASEAN: Job Aspirations in Energy

Share of respondents (%)



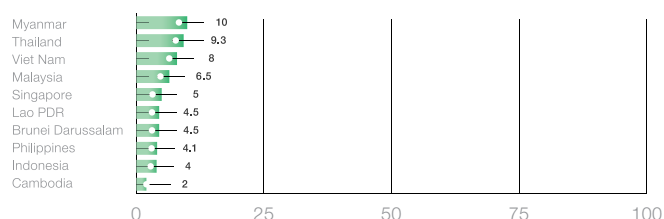
ASEAN: Job Aspirations in Healthcare

Share of respondents (%)



ASEAN: Job Aspirations in Transportation

Share of respondents (%)



Annex B.

Skills and Comparison Breakdown in ASEAN

1. Field Researcher Guidelines
2. Consent Form
3. List of Quantitative Questions
4. List of Qualitative Questions

Annex C.

Skills and Definitions

Skills Set	Skills Competency	Description
Self-leadership	Entrepreneurship	Jobs that require initiation, extraction, and maximisation of value through innovation to coin new businesses
	Time management	The ability to handle, prioritise, deprioritise, as well as multitask agenda based on the nature of urgency
	Self-motivation and initiative	The ability to be proactive in taking responsibilities regardless of given instructions
	Trustworthiness	The quality to produce, process and finalise the job independently, transparently, and reliably
	Working Under Pressure	The trait to produce quality work under tight circumstances
	Resilience	The quality to be persistent in the midst of pressure, disruption, or crises

Skills Set	Skills Competency	Description
Interpersonal	Leadership	The ability to guide, influence, and encourage individuals to achieve a common direction or vision
	Teamwork	The trait to collaborate efficiently with other team members in the work setting
	Team management	The quality to coordinate and manage the team's needs and priorities accordingly
	Social influence	The quality to negotiate and influence other groups' or individuals' decisions and behaviour
	Mentoring	The ability and willingness to transfer knowledge to co-workers efficiently
	Communication	The ability to deliver and convey information clearly and succinctly to the intended audience

Skills Set	Skills Competency	Description
Advanced Digital Skills	Web developer	The skill to develop a world-wide-web software, as well as maintenance of websites
	UI/UX	The ability to incorporate convenient user experience onto digital software or applications
	Programming	The ability to write computer programmes
	Coding	The ability to code computer programmes
	Product development	The process of translating ideas into digital products that are marketable
	Data science	The skills to employ multiple scientific methods, algorithms, and systems to provide analyses of patterns and estimations
	Data analyst	The skills to provide insight from certain sets of data

Skills Set	Skills Competency	Description
Basic Digital Skills	Digital marketing	The ability to reach, interact with, and influence customers on the promotion of brands or products using digital means
	MS Office	The skill to use sets of applications to enhance productivity by finalising daily tasks via Microsoft Word, Microsoft Excel, and Microsoft PowerPoint
	Digital design	The skill to utilise digital software to produce the intended design
	Accounting	The ability to assimilate and analyse financial accounts
	Clinical information system	The skills to utilise computer systems with access to clinical notes, medication history, laboratory reports, and other health-relevant information
	Cloud computing	The skill to use a wide range of storing services through the internet, employing knowledge on servers, databases, and networking
	Video conferencing	The skill to set up and share screens, and use other relevant tools on virtual video conferencing software
	Internet set-up	The skill to establish connections on the internet

Skills Set	Skills Competency	Description
Cognitive skills	Critical thinking	The ability to analyse, evaluate, and reflect on information critically
	Public relations	The skill to strategise and distribute information from individuals or firms to the public
	Project management	The ability to manage projects through agreed timelines and deliverables
	Creativity	The skill to reflect and modify original ideas to solve pressing issues, connect with peers, and enhance efficiency
	Technical knowledge	The ability to learn and grasp comprehensive technical knowledge accordingly based on one's academic background (e.g. medical, agriculture, etc).

Skills and Definitions

Developed by LOKA Impact Team

