# NAVIGATING A PANDEMIC

## Labour markets in Viet Nam during the covid-19 pandemic of 2020

Elvira Graner & ILSSA team

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# ACRONYMS AND ABBREVIATIONS

| | |
|---|---|
| **AFF** | Agriculture, fishery, and forestry (ie. primary sector) |
| **ADB** | Asian Development Bank (Manila) |
| **ASEAN** | Association of Southeast Asian Nations |
| **CIEM** | Central Institute for Economic Management (under MPI) |
| **CPI** | Consumer Price Index |
| **DFID** | Department for International Development (London) |
| **FDI** | Foreign Direct Investment |
| **FES** | Friedrich Ebert Stiftung (German pol. Foundation, linked to SPD party) |
| **DOH** | Department/s of Health (at provincial level) |
| **DOLISA** | Department/s of Labour, Invalids and Social Affairs (at provincial level) |
| **GDP** | Gross Domestic Product |
| **GIZ** | Gesellschaft fűr Internationale Zusammenarbeit (German Development Agency, Eschborn) |
| **GSO** | General Statistical Office (from MPI) |
| **GVN** | Government of Viet Nam |
| **HSF** | Hanns Seidel Foundation (German pol. foundation, linked to CSU party) |
| **ILO** | International Labour Organization (Geneva) |
| **ILSSA** | Institute of Labour Science and Social Affairs (under MOLISA) |
| **IMF** | International Monetary Fund (Washington, DC.) |
| **LFS** | Labour Force Survey (quarterly publication by GVN/GSO) |
| **LMU** | Labour Market up-date (quarterly publication by GVN/GMOLISA and GSO |
| **MARD** | Ministry of Agriculture and Rural Development |
| **MCIT** | Ministry of Communication and Information Technology |
| **MDF** | Ministry of Defense |
| **MDGs** | Millennium Development Goals (by UN, 2000 -2015) |
| **MFA** | Ministry of Foreign Affairs (also called MEF External Affairs) |
| **MET** | Ministry of Education and Training |
| **MOF** | Ministry of Finance |
| **MOH** | Ministry of Health |
| **MOIT** | Ministry of Industry and Trade |
| **MOLISA** | Ministry of Labour, War Invalids and Social Affairs |
| **MONROE** | Ministry of Natural Ressources and Environment |
| **MOT** | Ministry of Transport |
| **MPI** | Ministry of Planning and Investment |
| **MPS** | Ministry of Public Security |
| **MST** | Ministry of Science and Technology |
| **NSC** | National Steering Committee (for covid-19 response) |
| **pc** | per cent |
| **PCI** | Provincial Competitiveness Index (carried out by VCCI / World Bank) |
| **PIA** | Policy Impact Assessments |
| **RIM** | rapid impact monitoring (for UN / ILSSA study) |
| **SDGs** | Sustainable Development Goals (by the UN, 2015 - 2030) |
| **SIA** | Social Impact Assessment / Analysis |
| **SBV** | State Bank of Viet Nam |
| **SOE** | state-owned entreprises |
| **UEB** | unemployment benefit/s |
| **UNCTAD** | United National Trade and Development |
| **UNDESA** | Department for Social and Economic Affairs |
| **UNDP** | United Nations Development Programme |
| **UN/ESCAP** | United National Economic and Social Commission for Asia and the Pacific |
| **UNICEF** | The United Nations Children's Fund (New York) |
| **UNWOMEN** | United Nations Entity for Gender Equality and the Empowerment of Women |
| **VASS** | Viet Nam Academy of Social Sciences (Ha Noi) |
| **VCCI** | Viet Nam Chamber of Commerce and Industry |
| **VGCL** | Vietnam General Confederation of Labour (VGCL) |
| **VHLSS** | Viet Nam Household Living Standard Surveys |
| **VND** | Vietnamese Dong (in 2020 approximately 1 US $ : 23,000 VND / 1 Euro : 27,000 VND) |
| **VNTV** | Viet Nam Television |
| **VSS** | Viet Nam Social Security Scheme |



# EXECUTIVE SUMMARY

The covid-19 pandemic has posed a tremendous challenge worldwide, not only to global public health systems but also to economic systems and government policies, and continues to do so even more dramatically. Since the emergence of the pandemic in early 2020, the phrase "flattening the curve" has become a universal slogan, with public health experts and policy makers striving to tackle this "Mission (Impossible)". Over months of several successive and partially overlapping waves, in many parts of the world, these attempts have proven to be both transitory and elusive. California-based McSweeneys (2020) captured this situation succinctly, characterising the American (health) system as "flattened by the curve". Alongside this challenge, counterbalancing economic losses and navigating the fine balance between ensuring public safety and minimising economic damage was a key challenge throughout 2020, and beyond. For researchers engaged in policy analyses, clearly distinguishing between the impacts of the pandemic and other "under-currents" is a similarly critical challenge, posing significant methodological constraints.

Despite these challenges, throughout 2020, Viet Nam was remarkably successful in controlling both the epidemiological impacts of the pandemic as well as its economic ramifications. In spite of three (minor) waves in March, July/August and December, the total number of diagnosed cases remained at a record low of just 1,465 by the end of the year. In light of the country´s population of over 90 million, this implies a morbidity rate of less than 0.002 per cent, constituting one of the world's few success stories of 2020. In May 2020, the US-based magazine POLITICO ranked Viet Nam among one of the top countries in the world in terms of its response to the pandemic. Overall, Viet Nam was considered a model case in 2020, and the country has been applauded for "navigating the pandemic", hence the title adopted for this report. However, by spring/summer 2021, the situation changed considerably, pushing figures of daily new infections to 4-digit numbers by July and even 5-digit numbers by mid August. Nonetheless, this should not overshadow or call into question the impressive achievements made in Viet Nam during the year 2020.

To analyse the impacts of the covid -19 pandemic, several conceptual frameworks have been applied by various agencies. Among these, one comprehensive framework employed in 2020 by the World Bank and adopted by the United Nations will be briefly introduced. Empirical evidence on the case of Viet Nam has been gathered from several in-depth studies provided by the World Bank and the UN, the latter in the form of two complementary studies. The first of these studies focuses on Social Impact Analysis (UN 2020a/b), while the second study focuses on Economic Impact Analysis (UN 2020c), adopting one of the World Bank's conceptual frameworks. Several national agencies have also engaged in comprehensive studies, including MOLISA (GVN/MOLISA and GSO 2020e/g) and ILSSA (GVN/ ILSSA 2020a/b; published as giz and ILSSA 2021). Following ILSSA's previous studies, this study links covid-19 impact analyses to the wider framework of Social Impact Analyses (SIAs). As elaborated elsewhere, the theoretical perspective of governance studies has been an underlying principle (see Graner 2020). The literal meaning of the term gubernare, the Latin origin of the term governance, refers to steering/navigating a boat, hence the reason for integrating the term navigating into the title of this report.

The core policies set in place by the Vietnamese Government from January 2020 onwards include a range of regulations in the form of Decisions, Directives, Decrees and Resolutions (see 3.). These were issued by all core political units, including the Communist Party, the Prime Minister, and various Ministries. Overall, the two most decisive steps taken were to declare a national epidemic on February 1 – an extraordinarily far-sighted decision given that the country had only diagnosed 6 cases at that time – and to establish a National Steering Committee (NSC) as early as mid-January. This Committee was tasked not only with coordinating policies, but implementing a strong communication policy through government and private channels. Media agencies collaborated with popular musicians such as local celebrity, Min, whose animated video clip "Ghen Co Vy" (jealous covid) soon went viral, not only across Viet Nam but also worldwide.

During 2020, the national shut down was limited to 22 days in April. However, the country kept its borders and airports closed for the entire year, and beyond. To buffer the negative effects of this on labour markets and strengthen social security, Resolution No. 42/ND-CP (April 10) on "Assistance for people affected by the covid-19 pandemic", issued by the Communist Party, has been crucial. This was followed by Decision No. 15/QĐ-TTg (April 24) by the Prime Minister, on "Regulations on the implementation of policies to support people facing difficulties due to the covid-19 pandemic" (GVN/ PM 2020d). The latter provided 62 trillion VND (approximately US $ 2.69 billion/2.29

billion Euro) in funds. These support schemes aimed at mitigating the impacts of the pandemic on businesses and priority social groups. For the latter, these funds were provided either in addition to or as an extension of regular social assistance schemes, with the Ministry of Labour, War Invalids and Social Affairs (MOLISA) in charge of handling this crucial task.

Macro-economic analyses from 2020 demonstrated that GDP growth rates in Viet Nam needed to be revised several times to lower levels (see 4.). These re-assessments ranged anywhere between 6 per cent (initially) and 1.6 per cent, and stood at a record low of 0.36 per cent during the second quarter, as documented by the General Statistics Office (GSO). However, rates still remained at positive values and were assessed at around 2.91 per cent by the end of 2020. Nevertheless, a weak global demand will continue to have negative impacts on the Vietnamese economy, which will likely remain a challenge for the foreseeable future. Today, the focus is on finding ways to adapt to what has been termed "the new normal", which is likely to be quite different to the *status quo ante*, prior to the pandemic.

Certain sectors have been identified as severely hit by the pandemic during 2020. While tourisms and the hospitality industry were obviously affected and addressed early on, the impact on other sectors only came into focus later down the line. As captured by two World Bank studies of the pandemic's impact on the business sector, a highly volatile global market for garments and electronics became increasingly problematic as the year went on. As for the manufacturing sector, supply chains for inputs seemed a major bottleneck during the early stages of the pandemic. On the whole, when assessing future outcomes, balancing optimism and realism will remain a challenge. Notably, tourism could see an early recovery, once the government deems it safe to re-open its borders.

During 2020, the impacts of the covid-19 pandemic on labour markets in Viet Nam were quite substantial, particularly during the second quarter (see 5.). When analysing statistical changes to the labour force in Viet Nam, the impacts of the pandemic seem to be moderate, at least when compared to neighbouring countries, or even worldwide. However, there are vast gaps between the high numbers believed to be impacted by the pandemic (more than 30 million persons) and the low number that can be identified from statistical evidence. Available data from quarterly Labour Force Surveys (LFSs) identify only around 1– 5 million impacted workers (for details see Figure 5.1). It is crucial to point out that such analyses are likely to only reflect net changes and thus fail to fully capture complex dynamics.

Overall, the core features of the impacts of the pandemic are as follows: Firstly, it is underemployment rather than actual unemployment that has had the most severe impacts on labour markets. As a consequence, boundaries between the employed and unemployed have become blurred. Since the binary positioning of unemployment versus employment thus fails to provide analytical clarity, a clear analysis of underemployment is highly needed. Data for doing is being provided by GSO in their quarterly LFSs, and by MOLISA and GSO in their Labour Market Updates (LMUs). Secondly, the already fine line between formal and informal sectors has significantly shifted towards the latter. However, available data have only partially captured these changes. These two aspects (again) pose severe methodological challenges, alongside to an overly simplistic inclination to generally attribute all changes in 2020 to being caused by the covid-19 pandemic.

With regard to the labour force, impacts on the formal sector in 2020 were greater and longer lasting. On the other hand, impacts on workers in the informal sector were more existential, due to generally lower wages and a subsequently greater risk among these workers of falling below poverty levels. In addition to widespread underemployment, the strong trend towards informalisation implies not only a significant deterioration of wages, but also has implications for the working status of affected labourers, particularly in specific sectors such as garment manufacturing, in which major "adjustments" have been made due to declining global markets.

As a consequence, progress towards achieving the UN's Sustainable Development Goals (SDGs), particularly SDG 8 (decent work and economic growth) has been seriously jeopardised. As informal labour markets host a high share of low-income groups, the risk of informal workers falling below the poverty line has been (and will continue to be) a severe challenge. Thus, not only is SDG 8 at stake, but also SDGs 1 (eradication of poverty) and 2 (eradication of hunger). Efforts to meet international, regional and national commitments to social protection have also been impacted. Overall, these trends are diametrically counter to national economic policies, such as the Socio-Economic Development Strategy (2021-2030) or the Government's flagship National Green Growth Strategy (2012 and 2020).

During the initial stage of the pandemic in 2020, coping mechanisms at both household and business levels needed to be (re-)activated, with a reliance on private networks. By April, the Government had designed comprehensive schemes to support those hit most severely, although eligibility was difficult to identify, at least initially. This challenge is clearly illustrated by data from MOLISA and GIZ, indicating that among those eligible for support in cases where employment is not based on a contract (about 2.6 million persons listed), less than 5 per cent had received support by August. On the other hand, those who were already registered for other schemes, such as below-poverty level households or social protection beneficiaries, could be reached more swiftly (at 89 and 92 per cent, respectively). For many others, using savings and taking out loans was a wide-spread coping strategy. Overall, the situation was particularly difficult for those working in the informal sector as well as for ethnic minorities. Among the latter, poverty rates remained high for longer than for other groups.

In terms of long-term planning for future labour markets, shifting to accommodate higher skills/ educational levels has been repeatedly formulated as a core policy. Indeed, educational advancements among higher and middle-income groups have been quite impressive, and by 2018 about 25 per cent among those aged 25-29 had completed college or university. Such changes will allow for gradually shifting the labour force towards the service sector economy, and towards Industry 4.0, at some stage. Alongside this shift, wages will increase, setting the country on track to become an upper-middle income country. On the other hand, current data on education also suggests that even among the younger labour force (aged 20-24), a considerable proportion (about one third) have been excluded from such developments, which poses a challenge to achieving SDG 10 on reducing inequalities. For younger workers in particular, vocational trainings and/or other skill development schemes will be instrumental and need to be defined as a high priority. However, the number of such opportunities have remained insignificant, particularly among low-income groups. Concerningly, these have even declined over the past decade/s.

Publishing this report with a considerable time gap of several months has posed a major challenge. By mid-2021 the entire situation in Viet Nam had changed so substantially that highlighting previous successes may initially seem questionable. Nonetheless, achievements during 2020 have been remarkable and ensured greater stability, not only for the country but also for the entire region. This in itself warrants proper documentation, both for national as well as an international readership. Furthermore, the analytical scope of this report provides much wider analyses beyond the covid-19 pandemic, and exceeds one single year. While many of the themes analysed in this report have already been addressed from many different angles, we wish to contribute to their documentation and commentary. Placing these issues in a wider context will be instrumental in tackling the challenges of 2021.

Above all, we also feel the urgent need to point out considerable knowledge gaps. Specifically, comprehensive gender/social impact analyses would need to be based on a more nuanced methodology to capture changes at the household and community levels. Furthermore, changes within labour markets, whether directly or indirectly linked to the covid -19 pandemic, have been substantial and need to be studied in much more detail. Similarly, assessing access to support schemes and social policies in general remains a considerable enigma. These significant knowledge gaps are of critical significance. Thus, for a comprehensive analysis of gender and social impacts and disparities, we strongly suggest undertaking wider empirical studies based on a consistent conceptual framework. Nonetheless, we see this report and the overview it provides as a crucial contribution that hopefully inspires further debates.

# TÓM TẮT BÁO CÁO

Đại dịch COVID-19 đã và thậm chí vẫn đang tiếp tục mang tới những thách thức ngày càng to lớn không chỉ đối với hệ thống y tế công cộng toàn cầu mà còn đối với hệ thống kinh tế và chính sách của chính phủ trên toàn thế giới. Kể từ khi đại dịch bùng phát, cụm từ "làm phẳng đường cong" đã trở thành một khẩu hiệu phổ quát, với các chuyên gia y tế công cộng hoặc/và các nhà hoạch định chính sách phấn đấu để giải quyết vấn đề (gần như) không thể giải quyết được này. Trong bối cảnh đại dịch kéo dài nhiều tháng, diễn ra ở nhiều nơi trên thế giới với những làn sóng nhiễm bệnh liên tiếp và thậm chí chồng chéo nhau, những nỗ lực này đã được chứng minh là phù du và khó nắm bắt. McSweeneys (2020) có trụ sở tại California đã mô tả đặc điểm của hệ thống (y tế) của Mỹ là "bị san bằng bởi đường cong". Đồng thời, việc lựa chọn giữa hy sinh lợi ích kinh tế và cân bằng hợp lý giữa an toàn cho cộng đồng, cũng như giảm thiểu thiệt hại về kinh tế vẫn là thách thức của năm, và chắc chắn sẽ còn tiếp tục kéo dài lâu hơn thế nữa. Về mặt phân tích, việc phân biệt rõ ràng các tác động của đại dịch và các "dòng chảy ngầm"(được hiểu là các tác động ẩn và chưa phân tách được với tác động từ COVID) khác là một thách thức quan trọng tương tự. Điều này đặt ra hạn chế đáng kể về phương pháp luận cho các nhà nghiên cứu.

Mặt khác, trong suốt năm 2020, Việt Nam đã đặc biệt thành công trong việc kiểm soát các tác động dịch tễ của đại dịch cũng như hậu quả kinh tế của nó. Bất chấp ba đợt dịch vào tháng 3, tháng 7-8 và tháng 12 của năm, tổng số ca được chẩn đoán vẫn ở mức thấp kỷ lục, chỉ có 1465 người nhiễm đến cuối năm 2020. So với dân số hơn 90 triệu người, tương đương tỷ lệ mắc bệnh dưới 0,002 % - được ghi nhận là một trong số ít những câu chuyện thành công trên thế giới. Trong một so sánh toàn cầu vào tháng 5 năm 2020, tạp chí POLITICO có trụ sở tại Hoa Kỳ đã xếp Việt Nam ở vị trí hàng đầu trong việc ứng phó với đại dịch. Nhìn chung, Việt Nam đã được nhiều người coi là một hình mẫu, và được tán thưởng cho việc "điều hướng đại dịch", thuật ngữ này do đó được sử dụng làm tiêu đề cho báo cáo này. Mặc dù tình hình đã thay đổi đáng kể tính đến thời điểm những xuân/hè năm 2021, những thành tựu chống dịch ấn tượng đó trong năm 2020 vẫn là điều không thể bàn cãi và không thể bị lu mờ.

Để phân tích các tác động của COVID-19, một số khung nghiên cứu và phân tích đã được nhiều tổ chức và học giả khác nhau xây dựng. Trong số này, một khung nghiên cứu toàn diện được sử dụng trong năm 2020 bởi Ngân hàng thế giới và được tán đồng bởi Liên Hợp Quốc sẽ được giới thiệu ngắn gọn. Đối với Việt Nam, một số nghiên cứu chuyên sâu đã được Ngân hàng Thế giới và Liên hợp quốc (UN) tiến hành, trong đó Liên hợp quốc đã thực hiện hai nghiên cứu tổng hợp. Trong khi nghiên cứu đầu tiên tập trung vào Phân tích tác động xã hội (sđd. 2020a /2020b), nghiên cứu thứ hai tập trung vào Phân tích tác động môi trường (sđd. 2020c), áp dụng một trong các khuôn khổ khái niệm của Ngân hàng Thế giới. Tương tự, một số cơ quan trong nước cũng đã cung cấp các nghiên cứu toàn diện, bao gồm Bộ LĐTBXH (CPVN/BLĐ-TB&XH và TCTK 2020e / g) và ILSSA (CPVN/ILSSA 2020a/b). Như đã thực hiện trước đây, nghiên cứu hiện tại của chúng tôi đề xuất liên kết các phân tích tác động COVID-19 với khuôn khổ rộng hơn so với Phân tích tác động xã hội (SIA). Để làm như vậy, góc độ lý thuyết của các nghiên cứu về quản trị dường như là một góc độ lý thuyết hứa hẹn nhất. Nghĩa đen nguồn gốc Latinh (gubernare) của nó là chỉ việc lái / điều hướng một con thuyền, đó là một lý do thứ hai để sử dụng thuật ngữ này làm tiêu đề chính xác cho báo cáo này.

Các chính sách cốt lõi do chính phủ Việt Nam đưa ra từ tháng 1 năm 2020 trở đi bao gồm khá nhiều quy định, chẳng hạn như các Quyết định, Nghị định và Nghị quyết, Chỉ thị được Đảng, Chính phủ, Thủ tướng Chính phủ và các Bộ ngành ban hành. Nhìn chung, hai bước quyết định nhất là công bố dịch viêm đường hô hấp cấp do chủng mới của vi-rut Corona gây ra cấp toàn quốc vào ngày 1 tháng Hai, một quyết định có tầm nhìn rất xa, khi cả nước chỉ mới chẩn đoán được 6 trường hợp. Thứ hai, Chính phủ đã thành lập Ban Chỉ đạo Quốc gia phòng chống dịch COVID 19 (BCĐQG) vào trung tuần tháng Giêng. BCĐQG không chỉ được giao nhiệm vụ điều phối các chính sách mà còn đặt ra một chính sách thông tin liên lạc mạnh mẽ dựa trên các kênh của chính phủ và tư nhân. Những người làm trong lĩnh vực truyền thông đã chung tay với các ca sĩ nổi tiếng, chẳng hạn như ca sĩ Min trong Video clip hoạt hình "Ghen Co Vy" (jealous COVID) đã nhanh chóng lan truyền, không chỉ ở Việt Nam mà còn trên toàn thế giới.

Mặc dù thời gian phong tỏa thực tế trên toàn quốc chỉ kéo dài 22 ngày trong tháng 4, các cửa biên giới và đường bay Quốc tế vẫn bị đóng trong cả năm. Chính phủ đã ban hành Nghị quyết 42/NĐ-CP (ngày 9 tháng 4) và Quyết định số 15/QĐ-TTg của Thủ tướng Chính phủ (ngày 24 tháng 4) có ý nghĩa quan trọng giúp hạn chế những tác động tiêu cực đến thị trường lao động và tăng cường an sinh xã hội. Gói hỗ trợ 62 nghìn tỷ VND (tức là 2,69 tỷ USD/2,29 tỷ Euro), nhằm giảm bớt các tác động đối với các doanh nghiệp cũng như các nhóm yếu thế nhất, bao gồm các đối tượng chính sách an sinh xã hội và các đối tượng mở rộng khác. Bộ LĐTBXH được giao trọng trách để hoàn thành nhiệm vụ quan trọng này.

Các phân tích kinh tế vĩ mô cho thấy tốc độ tăng trưởng GDP ở Việt Nam cần được điều chỉnh nhiều lần xuống các mức thấp hơn nữa. Những lần điều chỉnh tốc độ tăng trưởng kinh tế dao động trong khoảng từ 6% (lúc ban đầu) đến 1,6 % và xuống mức thấp kỷ lục 0,36% trong quý hai năm 2020, được tính toán bởi Tổng cục Thống Kê Việt Nam. Mặc dù vậy, tỷ lệ vẫn đạt được ở mức tăng trưởng dương và đến cuối năm 2020 là khoảng 2,91%. Tuy nhiên, nhu cầu toàn cầu xuống thấp chắc chắn sẽ có những tác động tiêu cực đến nền kinh tế Việt Nam, và do đó các thách thức có thể tồn tại trong một thời gian khá dài. Nhìn chung, câu "khẩu hiệu" mới là để xử lý những điều trước đây trong trạng thái "bình thường mới", và điều này có thể sẽ hoàn toàn khác với hiện trạng trước đây (status quo ante).

Nhìn chung, một số lĩnh vực đã được xác định là bị ảnh hưởng nặng nề trong năm 2020. Ngành Du lịch và khách sạn đã chịu ảnh hưởng rõ ràng ngay từ đầu, các ngành khác chịu ảnh hưởng sau đó. Đối với ngành công nghiệp chế biến, chế tạo, chuỗi cung cấp nguyên liệu đầu vào dường như là một nút thắt lớn trong giai đoạn đầu, nhưng thị trường tiêu thụ thế giới biến động nghiêm trọng đối với hàng may mặc và điện tử đặt ra thách thức ngày càng nghiêm trọng về sau. Vấn đề này đã được đề cập trong 2 nghiên cứu do Ngân hàng Thế giới thực hiện. Nhìn chung, khi dự báo về tương lai, việc cân bằng giữa lạc quan và hiện thực sẽ vẫn là một thách thức. Ngành du lịch có thể sớm phục hồi, một khi chính phủ sẵn sàng mở cửa lại biên giới.

Tác động của đại dịch COVID-19 đối với thị trường lao động ở Việt Nam là khá lớn, nhất là trong quý II năm 2020. Khi phân tích những thay đổi về số lượng trong lực lượng lao động, tác động của đại dịch dường như ở mức vừa phải, đặc biệt là khi so sánh với các nước láng giềng, hoặc thậm chí trên toàn thế giới. Đồng thời, đang tồn tại một sự chênh lệch lớn giữa số liệu về người "bị ảnh hưởng" - là hơn 30 triệu người, so với số liệu thực tế có thể được xác định từ bằng chứng thống kê, thường thấp hơn nhiều. Đối với số liệu thống kê, dữ liệu dao động trong khoảng 1triệu người đến 5 triệu người và được xác định qua Điều tra Lao động việc làm hàng quý (ĐTLĐVL). Nhìn chung, các phân tích có khả năng chỉ phản ánh được những thay đổi thuần và do đó không nắm bắt được đầy đủ toàn bộ sự thay đổi (tăng/giảm).

Nhìn chung, trong thực tế, đặc điểm cốt lõi của các tác động của Đại dịch là như sau: đầu tiên tình trạng thiếu việc làm chứ không phải là thất nghiệp thực tế đã ảnh hưởng nghiêm trọng đến thị trường lao động. Do đó, mã hóa nhị phân (có - không) về tình trạng việc làm chỉ gồm thất nghiệp và có việc làm sẽ không cung cấp được những phân tích rõ nét, và (một lần nữa) đặt ra một hạn chế đáng quan tâm về phương pháp luận. Vì việc định vị nhị phân giữa tình trạng thiếu việc làm so với việc làm không mang lại sự rõ ràng trong phân tích, một phân tích rõ ràng về tình trạng thiếu việc làm là rất cần thiết. Dữ liệu về việc làm đang được GSO cung cấp trong các cuộc điều tra lao động việc làm hàng quý của họ, và bởi Bộ LĐTB & XH và GSO trong Bản cập nhật thị trường lao động (LMU) của họ. Thứ hai, tương tự như vậy, ranh giới giữa các khu vực chính thức và phi chính thức đã "uốn khúc" (bị mờ đi) đáng kể về hướng khu vực thứ hai. Hai khía cạnh này (một lần nữa) cho thấy những hạn chế lớn về phương pháp luận, cùng với khuynh hướng đơn giản hóa để quy chung cho các thay đổi trong năm 2020 về Đại dịch COVID-19.

Trong năm 2020, những người lao động trong khu vực chính thức chịu tác động mạnh hơn và lâu dài hơn. Nhưng mặt khác, tác động đến lao động trong khu vực phi chính thức có tính sống còn hơn do đại dịch có thể khiến người lao động rơi xuống mức nghèo khổ do tiền công, thu nhập thấp cũng như khoảng cách đến chuẩn nghèo gần hơn. Ngoài tình trạng thiếu việc làm phổ biến, xu hướng phi chính thức hóa mạnh mẽ đã không chỉ ngụ ý rằng tiền lương của người lao động bị suy giảm đáng kể, mà còn tác động xấu đến tình trạng việc làm của những người lao động bị ảnh hưởng, đặc biệt là trong các lĩnh vực cụ thể như sản xuất hàng may mặc, trong đó những điều chỉnh chính đã được thực hiện do thị trường toàn cầu đã bị suy giảm.

Như một hệ quả, việc đạt được các Mục tiêu Phát triển Bền vững (SDGs) của UN, đặc biệt là mục tiêu 8 (việc làm tốt và tăng trưởng kinh tế) đã và đang bị đe dọa nghiêm trọng. Do thị trường lao động phi chính thức chiếm tỷ lệ cao trong các nhóm thu nhập thấp, việc trượt xuống dưới ngưỡng nghèo đã (và sẽ) là một thách thức nghiêm trọng, và do đó việc đạt được các mục tiêu SDG 1 (xóa nghèo) và 2 (xóa đói) cũng đang bị đe dọa - tương tự như việc duy trì các cam kết của ASEAN về an sinh xã hội. Các xu hướng này thường xuyên tác động ngược lại các chính sách như Chiến lược Phát triển Kinh tế - Xã hội (2021-2030) hoặc Chiến lược Quốc gia về Tăng trưởng Xanh (2021 – 2020).

Trong giai đoạn đầu của đại dịch, cần có các cơ chế đối phó ở cả cấp hộ gia đình và cấp doanh nghiệp để kích hoạt (lại) nền kinh tế và những cơ chế này phụ thuộc phần lớn vào các mạng lưới hoạt động tư nhân. Đến tháng 4 năm 2020, chính phủ đã có được các kế hoạch khá toàn diện để hỗ trợ những người bị thiệt hại nặng nề nhất, tuy nhiên vào thời điểm ban đầu, các điều kiện để nhận được hỗ trợ lại khá cao. Thử thách này đã được ghi nhận rõ ràng trong dữ liệu của Bộ LĐTBXH và GIZ, cho thấy rằng trong số những người đủ điều kiện để được hỗ trợ trong trường hợp làm việc không có hợp đồng lao động (khoảng 2,6 triệu người được liệt kê), tính đến tháng 8 mới chỉ có chưa đến 5% được hỗ trợ. Mặt khác, những người thuộc các đối tượng của một số chương trình khác, chẳng hạn như các hộ gia đình nghèo hoặc các đối tượng trợ giúp xã hội, có thể tiếp cận nhanh hơn nhiều (lần lượt là 89% và 92%). Với những người khác, sử dụng tiền tiết kiệm cũng như tìm kiếm các khoản vay mới là chiến lược đối phó phổ biến hơn. Nhìn chung, tình hình đặc biệt khó khăn đối với những người lao động trong khu vực phi chính thức cũng như đối với người dân các dân tộc thiểu số. Khu vực phi chính thức và các dân tộc thiểu số là những nhóm có tỷ lệ nghèo cao và kéo dài hơn so với các nhóm khác.

Đối với việc lập kế hoạch dài hạn, việc chuyển nhóm lao động lên các trình độ kỹ năng / giáo dục cao hơn đã được lặp đi lặp lại để xây dựng thành chính sách cốt lõi. Trên thực tế, sự tiến bộ về học vấn của các nhóm thu nhập cao hơn và trung bình là rất ấn tượng, và khoảng 25% (trong số những người từ 25-29 tuổi) đã tốt nghiệp cao đẳng hoặc thậm chí là đại học. Những thay đổi như vậy sẽ cho phép chuyển dần lực lượng lao động sang khu vực dịch vụ và hướng tới Công nghệ 4.0 theo từng giai đoạn. Cùng với sự chuyển dịch này, tiền lương / tiền công cũng sẽ được tăng lên, đưa Việt nam trở thành quốc gia có thu nhập trung bình cao. Mặt khác, dữ liệu giáo dục hiện tại cũng cho thấy rằng ngay cả trong lực lượng lao động trẻ (20-24), một số lượng đáng kể vẫn chưa được đào tạo, đặt ra thách thức để đạt được SDG 10 về Giảm sự bất bình đẳng. Đối với các lao động trẻ, đào tạo nghề và / hoặc các chương trình phát triển kỹ năng khác sẽ là công cụ và cần được xác định là ưu tiên. Tuy nhiên, số lao động qua đào tạo rất không đáng kể, đặc biệt là ở các nhóm thu nhập thấp, và thậm chí còn giảm trong thập kỷ qua.

Việc xuất bản báo cáo này với một khoảng thời gian trống đáng kể khoảng vài tháng đã đặt ra một thách thức lớn. Đến giữa năm 2021, tình hình về COVID 19 ở Việt Nam đã có những thay đổi đáng kể đến mức việc làm nổi bật các thành công trước đây cũng có thể tạo sự nghi ngờ. Tuy nhiên, những thành tựu đạt được trong năm 2020 vẫn là to lớn và đã đảm bảo cho sự ổn định lớn trong năm 2020, không chỉ cho đất nước mà còn cho cả khu vực. Đây rõ ràng là một tài liệu tham khảo rõ ràng, cho cả độc giả trong nước và quốc tế. Ngoài ra, phạm vi phân tích của báo cáo này cung cấp cho các độc giả đa chiều phân tích rộng hơn là chỉ về Đại dịch COVID 19 hơn một năm qua. Mặc dù nhiều chủ đề được phân tích trong báo cáo này đã được đề cập đến từ nhiều góc độ khác nhau, chúng tôi mong muốn được đóng góp vào các tài liệu và bài nghiên cứu của họ. Đặt những vấn đề trên trong bối cảnh lớn hơn sẽ là công cụ để giải quyết những thách thức của năm 2021.

Hơn hết, chúng tôi cũng cảm thấy cần phải chỉ ra những lỗ hổng kiến thức lớn. Cụ thể, các phân tích tác động xã hội/giới tính sẽ cần dựa trên một phương pháp luận cụ thể hơn để nắm bắt những thay đổi ở cấp độ gia đình và cộng đồng. Những thay đổi trên thị trường lao động, dù liên quan trực tiếp hay gián tiếp đến đại dịch COVID-19 là rất đáng kể và cần được nghiên cứu chi tiết hơn. Tương tự, việc đánh giá khả năng tiếp cận các chương trình hỗ trợ và các chính sách xã hội nói chung vẫn là một bí ẩn nhưng có thể giải đáp được. Tóm lại, chúng tôi nhận thấy một điều quan trọng là cần phải chỉ ra rằng vẫn còn những khoảng trống kiến thức rất đáng kể. Do đó, để phân tích đầy đủ các tác động và sự khác biệt về giới và xã hội, chúng tôi đặc biệt khuyến nghị cần thực hiện một nghiên cứu thực nghiệm rộng hơn dựa trên một khung nghiên cứu và phân tích nhất quán. Tuy nhiên, chúng tôi thấy báo cáo này và những đánh giá tổng thể mà nó cung cấp là một đóng góp quan trọng mà hy vọng sẽ truyền cảm hứng cho các cuộc tranh luận sau này.

Source: Elvira Graner (Ninh Binh 2021)

# 1. INTRODUCTION - NAVIGATING A PANDEMIC

The Chinese zodiac year of the rat 2020/21 is one that will go down in world history as an exceptionally challenging, if not catastrophic year. For the first time since the so-called Spanish flu in 1918, the global covid-19 pandemic has brought public health systems around the world to their knees, and the global economy along with it. Public attention was first brought to the pandemic dramatically, when the Chinese authorities took what appeared at the time to be a rather draconian step. Communicated by global media and watched with incredulity across the globe, they sealed off the Wuhan region with its multi-million inhabitants, in the midst of the celebrations for the Chinese New Year. During the months that followed, the pandemic rapidly spread across continents, and only a few countries were lucky and/or rigorous enough to experience less damaging effects. Viet Nam was among these exceptions during the entirety of 2020, and until April/May 2021. It was subsequently the focus of attention from across the world, and from analysts across disciplines, including public health experts, economists, social policiy advisors, public administrators, and many others. However, since spring 2021 the country has suffered a severe set-back in containing the virus. Nonetheless, the achievements of 2020 remain, and appear even more remarkable and praiseworthy in the current climate.

When the Asian Development Bank (2020c) provided an early assessment about the impacts of this unfolding pandemic in April 2020, they sketched various scenarios. Interestingly, even a six-month duration was categorised as the “worst case”. Once the pandemic had spread across Europe and the Americas, it was soon assessed as having “plunged the planet into a deep recession” (World Bank 2020h, 4 and 2020i, xi), and representative of “the largest reversal in global economic growth since the Great Depression in the 1930s” (UN 2020c, 25). Curr, in his outline for the Economist´s “The World in 2021” argues that “never in recent memory has so much uncertainty hung over global growth” (ibid., 16), a phrase that somehow echoes Churchill’s speech about D-Day in 1944. Capturing socio-economic impacts of the pandemic in Viet Nam during 2020, the UN compared covid-19 “to a storm with frequent changes in the strength and direction of the prevailing winds” (ibid. 2020c, 25). For most other countries around the globe, it seems more appropriate to compare the pandemic to an unprecedented earthquake, followed by (several) waves of tsunamis – a multi-locational Fukushima taking place across the globe. A wave that by April/May 2021 was even to hit Viet Nam.

During 2020, numerous studies about the economic and social impacts of this unprecedented pandemic have been published worldwide. In December, the Economist (2020f) noted that, besides the two world wars, few topics have ever been so prominent in any publication (see Figure A5, annex). Adding a new one seems to aim at re-inventing the wheel, and asks for a justification, why and above all how this should be done. As pointed out above, due to the impressive success of containing the pandemic in Viet Nam during 2020, many eyes have turned to this country. Thus, in spite of Viet Nam's 1200-km border with China, as well as the country's considerable integration into global production chains and status as a prime tourist destination, the impacts during 2020 were much less dramatic. By the end of 2020, a total of 1,465 persons had been diagnosed with covid-19 infections, and only 35 deaths were reported for a population of more than 90 million. Thus, the mortality rate during 2020 stood at less than 4 in 1 million, accounting for 0.00039 per cent of the population, and 2.3 per cent of diagnosed cases (compared to 2.18 worldwide). The Vietnamese Government has been applauded from many sides for their timely and effective handling of the pandemic during the first year, both by the media as well as from analysts across disciplines. The IMF (2020c) even characterised Viet Nam as a potential "road map" for other countries.

In Viet Nam, as elsewhere, most studies have concentrated on either health issues or economic aspects, addressing macro-economic features, with some reference to labour markets. The latter topic will be the focus of this report, since it is of crucial importance for the Ministry of Labour, War Invalids and Social Affaris (MOLISA), and the Institute of Labour Science and Social Affairs (ILSSA), as its core research unit. Firstly, this study aims at providing a comprehensive literature review of what has been researched so far, both in Viet Nam and across the South-East Asia Region, providing a brief overview of the region (section 2.1), before focusing on Viet Nam (sections 4/5). Secondly, the urgent goal is to up-date ILSSA's (and other) previous studies and capture the most significant short- and longer-term changes that have occurred within recent months. For further research in 2021, ILSSA has also designed a series of case studies focusing on highly affected groups, as well as discuss a concise conceptual framework, aiming at a comprehensive Social (and gender) Impact Analysis (SIAs).

## 1.1 The world in 2020 – from flattening the curve to "flattened by the curve"

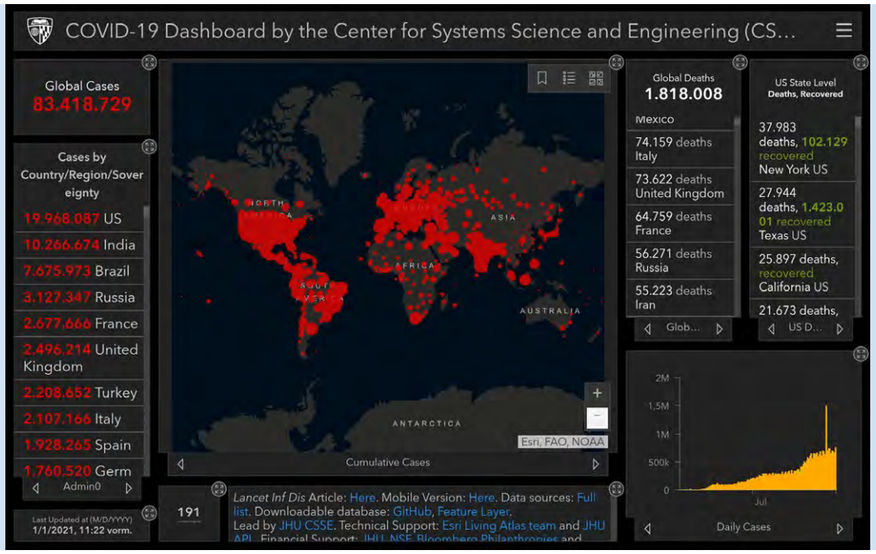
When the Economist published its flagship annual outlook "The World in 2020" in November 2019, their vision for the up-coming year addressed what seemed to be the core global issues and challenges. These mainly focused on the "usual suspects", such as economic and political leaders and issues around the globe, primarily the up-coming election in the US and Brexit (see Figure 1.1). Addressing global finance, an article entitled "the recession of 2020" posed a question mark, with the subtitle "Don´t bet on it" (O`Sullivan 2019, 123). As for the IT sector, the Economist predicted a "Techquake ahead. Silicon Valley awaits its seismic shake up" (Suich Bass 2019, 117). These titles could be retrospectively read as Delphian oracle predictions, in line with Curr`s comment that "history offers little guidance [...] as to what the right policy response is" (2019, 24). The Economist's iconographic cover page, resembling a vision test with letters rapidly disappearing out of sight (see Figure 1.1), adds to this notion. Weirdly, it squeezed the term recession between the words "Xi" (China) and "Modi" (India).

Yet, within a few weeks, 2020 became a year distinctly different from anything the large majority of mankind had ever experienced, defined primarily by the global pandemic of SARS (CoV-2), or covid-19, in short. By the end of the year there were more than 83 million persons diagnosed as infected across 191 countries, with more than 1.8 million among them confirmed dead, as documented meticulously with constant up-dates by Johns Hopkins University, Baltimore (see Figure 1.3). In addition, there are presumably large numbers of unidentified cases, notably in the populous northern states of India and in many, if not most, African countries. There, both testing and reporting have been "lagging", to put it mildly. Above all, the pandemic went (and partly still goes) along hand in hand with gradually unfolding economic, social, and political crisis. Throughout the entire year, governments around the world were struggling to confront several waves of exponentially increasing infection rates, at times with moderate success, but often without.

As a global remedy, "flattening the curve" (see Fauci 2020, Almond 2020, Hausmann 2020, Roberts 2020) was soon to become a universal slogan, wherever public health experts or policy makers sought to tackle the (nearly) impossible. In many places, success was both transitory and elusive, which McSweeneys captured succinctly when depicting the American health system as "flattened by the curve" (ibid.). The Economist's white-on-black title "How bad will it get?" (February 1; see Figure 1.2) can be seen as an early harbinger, documenting the magazine's pivotal role as a global seismic device. This title was soon to become the quintessential question of the year, and obviously beyond. While initially focused on China, the global dimensions of the pandemic were rapidly unfolding, in spite of the WHO's hesitancy to eventually call "a spade a spade" (or a pandemic, in this case), on March 11. From late 2020 onwards, struggles to obtain vital vaccines have added a new dimension to the crisis, which will continue for a while.

*Figures 1.1 and 1.2 Front covers of the Economist (2019 and 2020)*

*Figure 1.3 Covid-19 dashboard of Johns Hopkins University (2021, January 1)*

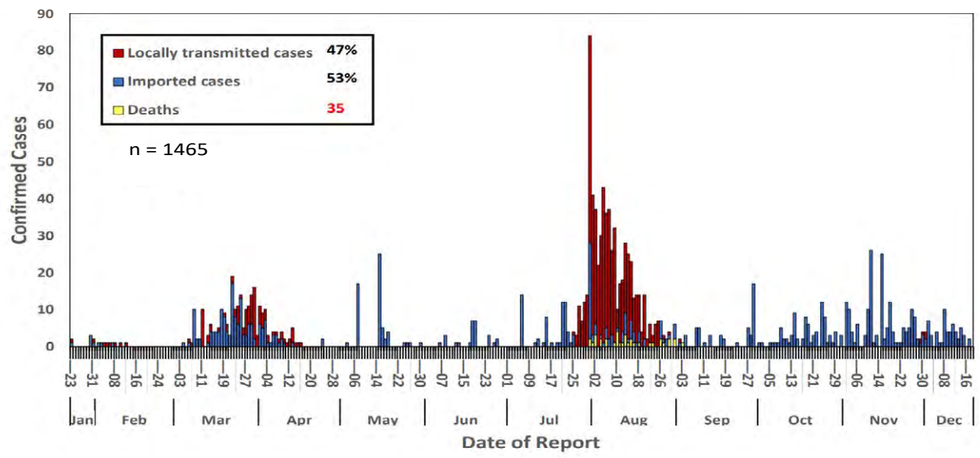


While the epidemiological aspects of the covid-19 pandemic were initially centre stage, this gradually shifted. By April 2020, the ILO proposed that covid-19 had "plunged the world into a crisis of unprecedented scope and scale" (2020c, 1). In the same month, the editors of the ADB's Asia Economic Outlook felt the need to add a new chapter to their annual report, entitled "Special Topic: The Impact of the Coronavirus Outbreak" (ibid. 2020c). In this chapter, president Asakawa argued that "Developing Asia will weaken tremendously due to the pandemic, considering the region's deep integration with the global economy through tourism, trade, and remittances" (ibid. 2020, i). In addition to the threat to global health, it gradually became clear that the financial losses could and most likely would be devastating. Worldwide scenarios were dramatic. However, even today, assessing the full damage of the on-going pandemic is characterised by uncertainty, as quoted above from Curr (2020, 16). Similarly, reflecting on the case of Viet Nam, GIZ and GVN/CIEM argued that, for the first quarter of 2020, data "may fail to fully reflect the severe impact" (2020, 1) − a crucial argument that remains valid today (see also ADB 2020c, i/xii).

In retrospect, early assessments were primarily characterised by an overly-strong focus on what might, or might not happen in China, and the economic ripples this would send across the Asia-Pacific region, and obviously beyond. Yet, these initial worries were soon overshadowed by the gradually evolving understanding of the global scale of the pandemic, and the unprecedented economic crisis this would evoke. The combination of the two was often compared to the Spanish flu of 1918 (Beach et al. 2020). Yet, a highly globalised world was to provide a categorically different context. As a result of the Spanish Flu, about 20-50 million persons died, infected by a virus that originated in rural Kansas (US) and was carried to the battlefields of World War I, first to Europe, and then across the world. Seperating the pandemic and its effects of the war itself was impossible. Today, in spite of a century of pharmacological advancement and research on vaccines, the covid-19 pandemic has had similar effects, and the epidemiological and the economic aspects of the virus continue to be intrinsically intertwined.

While most governments continue to struggle with the pandemic and its aftermath, throughout 2020, Viet Nam was an exceptional case, containing the outbreak of the virus and mitigating the most damaging economic consequences successfully. As mentioned above, by the end of the first year, the total number of infected persons reached only to 1465, around half of which were imported cases from abroad (see Figure 1.4, below). Overall, "waves" of the pandemic in Viet Nam have by and large remained small spikes, and on most days daily cases ranged between 10-40 persons, besides one single day on July 31 2020, on which 84 cases were reported (GVN/MOH and WHO 2020a). The success that these figures document has been attributed to "a combination of foresight and pragmatism" by the World Bank (ibid. 2020h, xii). This dramatically changed in April/ May 2021, when daily cases reached 3-digit numbers, followed by 4-digit figures on July 5 2021, and 5-digit figures on August 18 2021 (Johns Hopkins University 2021; GVN/MOH and WHO 2021b).

*Figure 1.4 Diagnosed cases of covid-19 in Viet Nam (GVN/MOH and WHO 2020d, 4)*






Viet Nam's deepening international economic integration means that global markets decisively define local economic production, as argued by Asakawa (2020). The Economist also noted the risk of "deterring foreign capital" (ibid., quoted by Vietnam News 2020c). Accordingly, growth estimates by all major agencies, both national and international, have been continuously revised, and usually for the worse. ADB for instance revised their assessments for Vietnamese GDP growth rates in 2020 from 7 per cent to about 4.8 per cent in April (2020c, 309) and to 4.1 per cent by autumn (2020d, 8). As will be elaborated in more detail, in line with GVN/GSO data the World Bank (re-)assessed GDP growth at 2.8 per cent (2020h, xiii; see 4.1). Nevertheless, growth rates have remained at positive values, in decisive contrast to many other economies both in the region and worldwide. Overall, Viet Nam can be praised for successfully "Navigating the pandemic" (IMF 2020e) throughout 2020.

## 1.2 A brief methodological outline

The covid-19 pandemic has been covered extensively, at various scales, globally, for world regions (Asia- Pacific and South-East Asia) and at the national levels. Writing this report went hand in hand with compiling a digital library of studies about the impacts of covid-19, which rapidly grew to more than 270 publications (see 7. bibliography). These cover a rich empirical range of topics, focusing on impacts on macro-economic developments and labour markets. Methodologically, for Viet Nam many of these studies are based on macro-economic data, as well as quantitative surveys and analyses (such as GSO's quarterly Labour Force Surveys), in addition to some qualitative studies. The lengthy review process also involved looking into conceptual approaches, and linking these to the wider field of (social) impact analyses (and governance). We will follow this up in future studies, and we see the current report as an important building block for doing so.

At the regional level (Asia-Pacific/ASEAN /South East Asian region), analyses have been carried out by a number of international agencies, such as the ADB, the IMF, UN agencies (most prominently the ILO), the World Bank and the World Economic Forum (WEF). At the national level, the country offices of these organisations have engaged in comprehensive analyses, often jointly with their line ministries from the Vietnamese government, such as the Ministry of Health for WHO, and MOLISA for ILO. In addition, the GIZ Country Office of Viet Nam has initiated (and co-funded) a series of studies with several national partners, including MOLISA, ILSSA, MOF, MPI, CIEM, and VCCI (for full names see list of acronyms). Focusing on the business level, VCCI has also co-authored a comprehensive study with the World Bank (and AusAid), as a part of their regular annual Provincial Competitativeness Index (PCI), based on more than 10,000 companies.

In terms of assessing labour markets, a vast statistical database exists in the form of the Government's quarterly Labour Force Surveys (LFSs). Based on samples of 200,000 persons per survey, and an accumulated annual sample of 800,000 persons (GVN/GSO 2020a-d, 2019, 2018), these are regularly summarised by GVN/ MOLISA and GSO in the form of the Labour Market Updates (LMUs). In terms of analyses, we have "mined" these sources in more detail, through demographic analyses for assessing social, gender and age disparities (so-called cohort analyses), as well as sectoral (and to some extent regional) disparities. In doing so, two particular fields of interest emerged, centred on the crucial yet ambiguous distinction between formal and informal labour markets and employment, and manufacturing and garment workers. To enable us to better assess future labour markets, our analyses also include a sub-chapter on educational advancements. Since education and skill levels are core components for understanding changing labour markets, analyses have been carried out on social disparities for different age groups (20-24 for 2010 - 2018), based on data from the most recent Viet Nam Household Living Standard Surveys (VHLSSs).

Primary data have been gathered by various government agencies, including ILSSA. Our two complementary studies on impacts of covid-19 on informal labour markets and on formal labour markets (2020a and 2020b for giz and HSF, respectively), have formed the foundation for this comprehensive report. These studies are based on sample sizes of 178 and 150, respectively, with data collected in Ha Noi, Hoa Binh and Quang Ninh from June to August 2020. Both studies combine quantitative and qualitative analyses. The latter are based on key informant interviews, and a number of case histories. These life histories, in particular, provide rich insights and have been partly presented here, reflecting the substantial changes and challenges faced during the year 2020. In addition to studies on the labour force, ILSSA has also compiled a large-scale study for DANIDA on micro-enterprises. Based on interviews with nearly 2000 households, the survey includes a small section on the severity of the impacts of covid-19 on household business enterprises.

Secondary empirical data includes evidence provided

by the World Bank and the UN in the form of a RIM study. The World Bank conducted their study as a two-phase panel in spring and during the later summer of 2020, based on samples of 4,000/6,000 persons. In terms of individual scholarship, quite comprehensive studies were carried out by Do Quynh Chi, for the FES (Do Quynh Chi 2020) and for ILO (ILO 2020i). Both of these studies concentrate on manufacturing industries (including garments) and tourism, based on sample sizes of 250 - 300 persons. In addition, several NGOs, such as CARE, Action Aid and Save the Children compiled small-scale case studies in 2020.

In summary, the comprehensive analyses involved in this study focus on social, gender, as well as generational disparities within labour markets (see section 5). Much of the analyses focus on capturing general labour markets trends, in addition to trends that have emerged in 2020. Since labour markets are intrinsically embedded within the macro-economy, the latter must be explored first (see section 4). In order to communicate the results of these analyses of secondary and primary data, visual representations of key findings feature prominently throughout this report. Some of these are presented in form of original graphs from reviewed publications. In addition, new analyses address gender and demographic factors, and provides chronological comparisions. For the latter, statistical data has been presented in the annex (see Tables A1 - A23), whereas the report itself provides these figures in graphs.

## 1.3 Introducing a conceptual framework

Conceptual frameworks are crucial tools in order to outline both the theoretical as well as the metho-dological understanding guiding the research. As briefly stated in the introduction, most studies on the covid-19 pandemic do not explicitly refer to any conceptual framework/s, and we perceive this as a major short-coming. We are currently in a process of contributing to filling this gap, and we also wish to encourage and stimulate discussions about how to refine our ideas. For doing so, we suggest strong, or at least stronger, links between studies focussing on covid-19 and Social Impact Analyses (SIAs). As we will outline elsewhere, at a theoretical level we suggest to link these to governance studies (see Graner 2020). For outlining these conceptual ideas we will first of all portray one of the several existing frameworks for covid-19 studies. In a second step, we will then briefly introduce two frameworks that focus on social impact analyses (SIAs). For future research, we aim at blending and refining these two fields, and we see this report as a first step.

Overall, analysing (social) impacts is characterised by a severe methodological flaw: There always is high level of uncertainty differentiating between correlations and causalities, what development economists refer to as "attribution gaps" (Vaessen 2017, CGD 2006, Stern et al. 2012). While distinguishing direct and indirect effects might provide some form of clarity, it is often difficult to identify these presumable causes and what would have happened even without interventions, or without the covid-19 pandemic, in this case. As stated above, most studies about the covid-19 pandemic do not explicitly refer to any conceptual framework/s. One that focuses on labour markets was published by ILO Bangkok, on "Quick impact assessment of covid-19 pandemic on the key independent sectors" (2020). Yet, our core argument is to emphasise the strong need to conceptualise labour markets as being intrinsically embedded in (and thus intertwined with) macro-economic developments and challenges. From this vantage point, we suggest a framework that addresses the latter aspect quite comprehensively, as provided by the World Bank (2020c), and later on adopted and modified by the UN Viet Nam, for their study on Economic Impact Analysis of covid-19 (2020c).

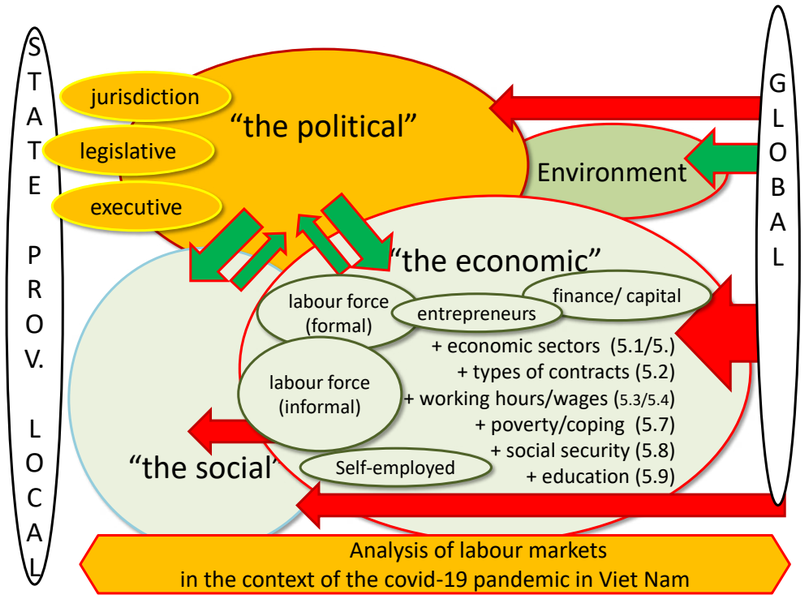
This UN / World Bank framework defines five core stakeholders: households, government, business, along with "ROW" (rest-of-the-world) and finance (see Figures A1 / A2, annex). Linkages between most of these core entities have been defined quite comprehensively, and include taxes, transfers, remittances, imports/ exports, FDIs, and borrowings. While several types of borrowings have been specified in detail (foreign, government, and business) one form of crucial im-portance for social impact analyses needs to be added at the household-level, namely (household) borrow-ings. One (other) short-coming is that a few crucial interlinkages have remained unaddressed, for instance between households and businesses. These exist both in form of production/consumption and integration into the labour force, the latter being the focus of this report.

When considering (social) impact analysis/-es, policy makers and scholars generally agree upon the pivotal role of it for any sort of policy implementation (European Commission 2009, DfID and Stern et al. 2012, OECD 2015, World Bank 2016). Yet, while many authors have contributed to advancing this field, they often refrain from explicitly outlining analytical frameworks (see also Vanclay and Esteves 2011, Esteves et al. 2012, Vanclay 2002, Ward 2007, Westhorp 2014, as well as Dani and Beddies 2011). A framework outlined by Flinders University, has been adopted by MOLISA as well as GIZ Viet Nam. Following the Law on the Promulgation of Legal Documents 2015, the Ministry of Justice passed Decree No.34/2016 (GVN/ MOJ 2016), that made social impact assessments mandatory for any planning activities in Viet Nam (ibid., Article 7). The framework by Flinders University outlines five pillars, specifying economic, social, environmental, legal, and political (sub-)frameworks (see Figure A3, annex), ie. it disaggregates the political into two separate fields. Similarly, the Vietnamese Government's conceptual framework has added gender, but does not include the environment (see Figure A4, annex), thus disaggregating the social (xã hội) and gender (giới) into two separate categories (GVN 2016; giz and MDF 2020, own translation).

The analytical framework that we have adopted for this study has taken up several aspects of these two SIA frameworks. Again, we see this as a first step to engage in a SIA, by outlining our conceptual ideas, that we will take up at a later stage. At the same time, it also suggests a few crucial modifications. The main one is to adhere to ideas of political theory, defining "the political" by three core fields (whether pillars or circles), namely the legislative, the executive, and jurisdiction (see Shugart 2008, Leopold et al. 2008). Since these are constitutionally intrinsically intertwined and of equal importance, we include all three within one field ("the political"), rather than selecting and emphasising only two among the three. Since we aim at emphasising the interlinkages, we have adopted the GVN's circular system rather than Flinders' model of (stand-alone) pillars, and visualised these as overlapping fields/ spheres.

Our conceptual framework differentiates four spheres: the political, the economic, the environmental, and the social, the latter with a strong focus on gender (see Figure 1.5, below). Since covid-19 also has substantial (indirect) impacts upon the environment, we strongly suggest to include this sphere, although for the current study we will not address it. We also take up an important idea from the World Bank / UN framework, by addressing the global level (but we avoid the term "ROW"; see Figure 1.5, right hand side).

*Figure 1.5 Conceptual framework for assessing labour markets (Graner & ILSSA colleagues 2020/21)*



Yet, in contradistinction to their framework, we do not attribute it as being a field of equivalent status, so it is placed as an external field. For future and more detailed analyses, we also strongly suggest a multi-tier approach. For the latter, we distinguish and specify three different levels, zooming up/down from the local to the provincial and the national/state level (on the left hand side). When ordering the three political fields, we see the executive as reaching most strongly across all three levels (thus placed closer to the provincial/local level), while jurisdiction is at the top. As outlined elsewhere, these spheres are defined by processes of governance. For doing so, core stakeholders within these spheres are engaged in processes or (re-)negotiating the "rules of the game" (for details see Graner 2020).

Overall, the current study will focus on the economic sphere, and specifically on labour markets (see 5.). As outlined above, our core argument is that labour markets can not be analysed as isolated entities but need to be embedded into an analysis of macro-economic developments (see 4.). Analysing the economic field has been based on identifying the core stakeholders, as well as the interlinkages between the economic and political spheres. These core stakeholders are the labour force, entrepreneurs, and entities providing finance / capital. Due to our strong focus on the labour force, we have disaggregated these into formal and the informal sectors, with substantial overlaps (see Figure 1.5). Interlinkages to the political sphere include taxes in regular years, or subsidies during the current pandemic. For the labour force, we will address formality/informality, working hours and incomes, as well as social security in subsequent chapters (see 5.2 - 5.9). Again, we do not claim to provide a social impact analysis but rather see this as a building block, stimulating discussions.

Source: AvantDG/GIZ VN

# 2. INTERNATIONAL ASSESSMENTS OF THE COVID-19 CRISIS

## 2.1 Assessments of the covid-19 crisis in the Asia-Pacific region

As the bibliography of this report (see section 7.) indicates, the covid-19 pandemic has been covered extensively, and at various scales, both globally, within world regions (i.e. Asia-Pacific and South-East Asia) and at national levels. Analyses by economists from various agencies (including ADB, IMF, UN agencies, World Bank, pwc, and WEF) have gradually acknowledged the far-ranging implications of this unprecedented global economic crisis. Two of the earliest studies about the Asia-Pacific region were published by the ADB in February and March (2020a, 2020b), followed by their revised Asia Economic Outlook in April (2020c). In their second study in March, they identified "numerous channels of sharp declines", which included "domestic demand, lower tourism and business travel, trade and production linkages, supply disruptions, and health effects" (ibid. 2020b, 1). In terms of journalistic analyses, the Economist can be attributed a leading role, addressing the "corona-outbreak" for the first time on January 24 2020. As early as February 1, the editors featured the issue prominently on a cover page (see Figure 1.2, above). They also assessed it as "likely to become a pandemic", long before the WHO was willing to follow suit.

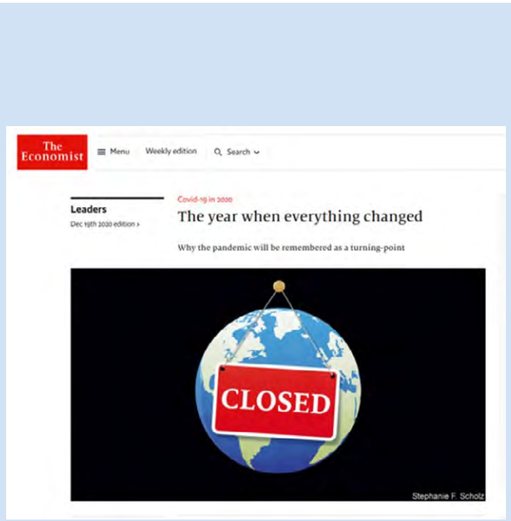
Assessing the economic impacts of covid-19 on Asian countries, the ADB's Brief (2020b/March) estimated global financial losses ranging between US $ 77 billion and US $ 347 billion, equivalent to about 0.1 per cent to 0.4 per cent of global GDP, "with a moderate case estimate of US $ 156 billion", accounting for 0.2 per cent of GDP (ibid., 9). Estimations for macro-economic declines were highest for China, at US $ 15 billion to US $35 billion in best/worst case scenarios, respectively. In comparison, the potential loss for Viet Nam was assessed at US $ 1.06 billion to US $ 2.8 billion, equivalent to -0.4 to -1.1 per cent of annual GDP (ibid., 13). As briefly mentioned above, the ADB Brief provided four scenarios for assessing the impact on the economy, categorised as low, middle, worst case, and "hypothetical worst case" (ibid., 5). As will be shown in detail below (see 4.1), by the summer of 2020 assessments were far more pessimistic, and by December, comprehensive stock taking was in full swing. When re-assessing GDPs for 2020, the ADB estimated a decline of minus 4 per cent for the Southeast Asia region, compared to a growth rate of 2.9 per cent in Viet Nam (ibid. 2021, xxii), representative of "one of last year's highest growth rates in the world" (ibid., 332). At a global level, the year was starkly epitomised by the Economist's title page on December 19, which featured an iconic image of the globe against a black background, with a red signboard reading "CLOSED" (see Figure 2.1, below).

Overall, the ADB's brief (#128, 2020b) was characterised by at least two crucial biases. One was an overly strong focus on the impacts of the pandemic on China, where the outbreak appeared to be concentrated at the time. The second bias was a heavy emphasis on tourism, and the limitations of traveling. As became clear within a few weeks after publishing the brief, these two assumptions severely under-estimated both the pandemic itself as well as the (macro-) economic dimensions of the crisis. For Viet Nam, this focus on tourism and travel bans implied that the country was not assessed as being strongly affected, as tourism accounted for less than 10 per cent of its GDP in recent years, leading Viet Nam to be ranked 24th among the region's 40 countries (ibid.). The only parameter where Viet Nam was ranked critically high, in fourth place, was in regard to the high share of Chinese tourists, who accounted for 32 per cent of tourists at the time (ibid., 6; for further details see section 4.2 below). While the ADB's overall assessment for Viet Nam was correct, the assessment criteria need to be reconsidered.

The initially strong focus on tourism gradually gave way to more comprehensive views of potential economic losses. In April 2020, a new ADB Brief (#148; Tanahaka and Villafuerte 2020), addressed the role of migration and remittances, along with global trade. When comparing the relative value of exports for countries within the Asia-Pacific region, they assessed the Vietnamese economy at an extremely high level, particularly in regard to exported goods – a point also made by the World Bank (see Figure 2.2). In line with many other authors, they estimated that regional growth was pulled down by several parameters, including "shrinking private consumption and investment, and by contracting manufacturing and services" (ibid., 7). In terms of private consumption they argued that this was "hit by declining incomes, mobility restrictions, and an increase in precautionary savings" (ibid.). At the same time, they assessed that "[t]he sharpest output declines are in services rather than manufacturing" (ibid.) – an assessment that we do not necessarily agree with. Given their mandate on trade, UNCTAD, for instance, assessed losses in manufacturing as substantial (see Figure 2.3, below).

Other macro-economic parameters included in the first ADB's brief (#128) are global exports. Since once again, China was taken as the main point of reference, and Viet Nam was only ranked 5th in terms of criticality. At the same time, while exports account for about 14 per cent of GDP in Viet Nam, the strong links to global value chains (both up-stream and down-stream) were ranked second, surpassed only by Taiwan (ibid.). Overall, these global linkages are critical for the Vietnamese economy and its labour market/s, and will be discussed in more detail (see sections 4.1 and 5.4, below).

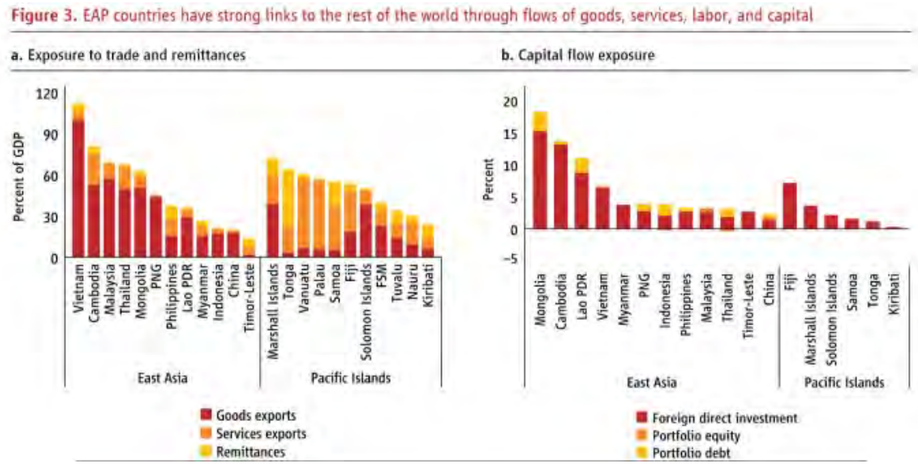
*Figure 2.1 Depiction of the World Economy as "Closed" (The Economist 2020, December 19)*




Of high interest for this study is the World Bank's assessment of labour markets (ibid. 2020c). Based on several studies of countries from across the Asia-Pacific region (including Viet Nam) the World Bank assessed unemployment and sectoral changes within the labour force (see Figure 2.4, below). They estimated employment declines at 22 per cent, with the highest share among those who lost jobs in the service sector, with employment declining from 51 to 38 per cent in this sector. This rate of decline was followed by the industrial sector (22 to 15 per cent). On the other hand, these figures imply that, based on a sectoral analysis of the labour force, the risk of unemployment was highest in the industrial sector (minus 31.8 per cent), and the service sector (minus 25.5 per cent) and the lowest in agriculture, at less than 10 per cent. The World Bank also documented some minor shifts across the different sectors, mainly from services and industry to agriculture, and to a much lesser extent from services to industry, and vice versa (see Figure 2.4, below). While these figures might reflect trends in the region as a whole, it is crucial to note that in Viet Nam, the service sector is much less prominent, and agriculture still accounts for a large share of the labour force (see section 5.1, below).



*Figure 2.2 Global trade for Asia-Pacific countries (World Bank 2020d, 4)*

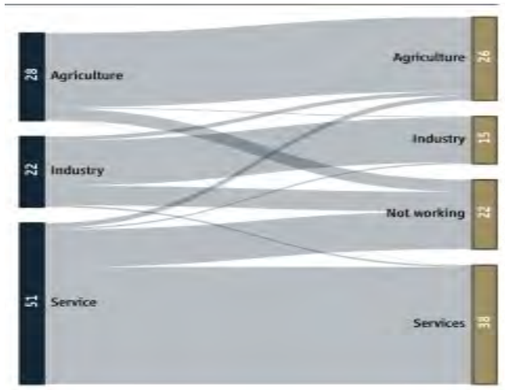



By the end of the year, ILO in their "Asia-Pacific Employment and Social Outlook" estimated that in the Asia Pacific region alone, there would be a loss of "81 million jobs in 2020 over pre-crisis trends" (2020h, xi). Even more critically, they noted that an "additional 22 million to 25 million employed persons [were] pushed into the realm of extreme poverty" (ibid.), with expenditures amounting to less than US $ 1.90 per day. By the end of the year, ADB had tripled this estimate, to 78.3 million persons, arguing that covid-19 had "wreaked havoc on poor communities" (2021, 38).

*Figure 2.3 Assessing global trade manufacturing outputs (UNCTAD 2020a, 20)*

With regard to labour markets, ILO also raised strong concerns about under-employment. They estimated that working hours in the Asia-Pacific region had "decreased by 15.2 per cent from fourth quarter 2019, which translates to a loss of 265 million full-time equivalent jobs" (2020h, 65ff). When disaggregating the gender composition of those facing underemployment, ILO estimates a higher number of men, at 38 million versus 30 million women (ibid., 66). However, when viewed in relation to the overall composition of the labour force in the region (at about 1.9 billion), working hour declines among women in the labour force exceeded those of men, at 4.4 per cent versus 3.1 per cent.

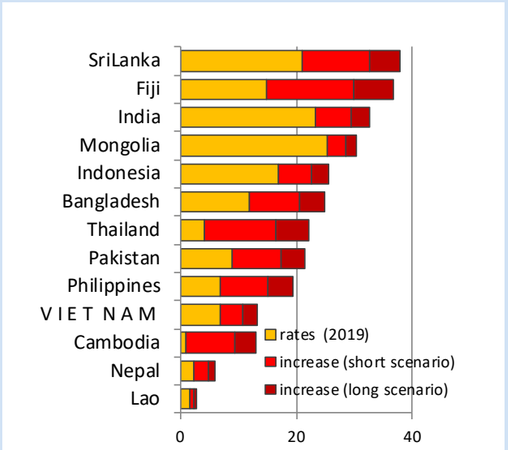
*Figure 2.4 Impact of covid-19 on labour markets in Asia-Pacific countries (World Bank 2020d, 9)*



Overall, the chances of job loss were highest among young people in the labour force, with the numbers in this group declining from about 220 million in 2019 to only 200 million, accounting for a loss of more than 9 per cent (all data calculated from ILO 2020h, 66). This trend has also been confirmed more recently by data from 2021, which still suggests that the group hit hardest have been youths, at a rate of decline of 10.6 per cent, with young people accounting for about 50 per cent of all newly unemployed (ILO 2021e, 6). In light of this, ADB and ILO have coined the term "the lock down generation", arguing that young people today "will feel the weight of this crisis for a long time" (2020, vi). Overall, rates for youth unemployment in 2019 ranged between 12 and 24 per cent for about half of the countries in the Asia-Pacific region (ibid., 21) – a pattern also prevalent during the 2008 economic crisis (see O'Higgins 2017, 1). Compared to these countries, the rate in Viet Nam was considerably lower (at 6.9 per cent), and declines were also less severe, even for the high-containment assessment. For the latter, rates were estimated to double, reaching 13.2 per cent (see Figure 2.5).

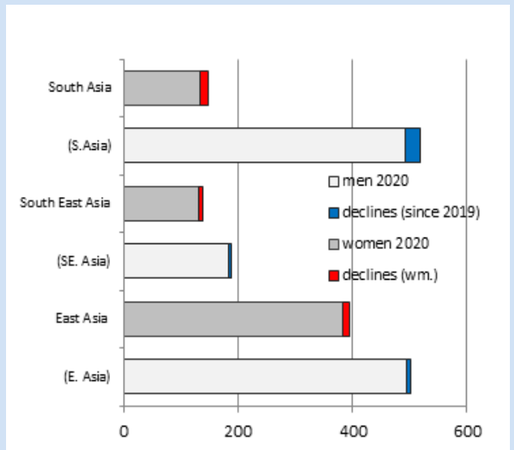
When comparing unemployment among the entire labour force in different sub-regions within the Asia-Pacific region, labour contraction was highest in South Asia where women have an extremely low participation rate overall (see Figure 2.6). In South-East Asia, the total number of unemployed was assessed at 10 million, compared to 40 million in South Asia and 17 million in East Asia (ILO 2020h, 65-68; for detailed figures see Table A1, annex). For South-East Asia, the gender composition indicates that the overall number of unemployed men and women was equal (at 5 million each). Yet again, since women account for a smaller proportion of the labour force (137 million in 2019, and 189 million men) the rate of decline among women was comparatively high, at 3.6 per cent versus 2.6 per cent among men (ibid).

*Figure 2.5 Unemployment rates among youth in Asia-Pacific sub-regions [percentages]*




*Source: based on ADB and ILO (2020, 14 / 21)*

*Figure 2.6 Labour force changes (for women/men) in Asia-Pacific sub-regions*



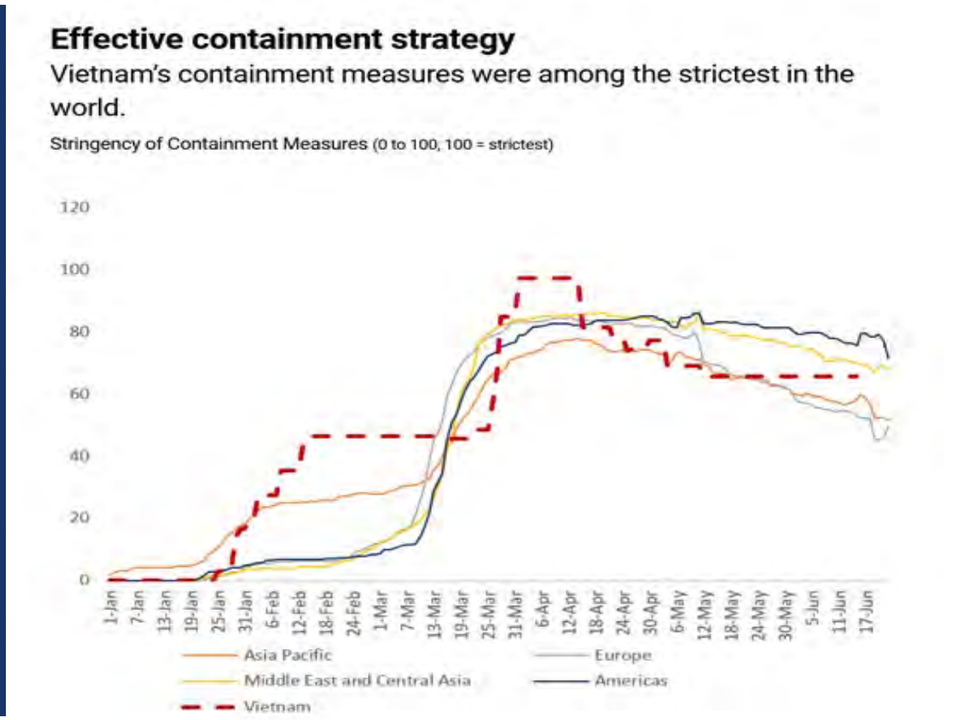

*Source: based on ILO (2020h, 65-68)*

Also of importance for this study is the fact that poverty rates in the Asia-Pacific have risen considerably as a result of economic turbulence, as pointed out by both the World Bank (2020c) and ILO (2020h). Thus, after steady declines in poverty for the past 20 years, the pandemic is "expected to reverse the sustained trend of poverty reduction" (World Bank 2020c, 11/12). While the World Bank had previously assessed that during 2020, a total of 33 million persons would be in a position to escape poverty, they later revised their projections, predicting that poverty is likely to increase by 1.6 - 1.8 per cent (accounting for an additional 33 to 38 million persons in the region; ibid.).

## 2.2 Assessing Viet Nam's pandemic strategy from an international perspective

To analyse the effectiveness of covid-19 containment measures set in place globally, a comparative study by the Blavatnik School of Government at Oxford University has calculated a multi-dimensional "stringency index" for 2020 (ibid. 2020; Heath and Jin 2020). While the original index focused on world regions, this index was later on adopted by several scholars and institutions, calculating national levels. For Viet Nam, Dabla-Norris et al. (2020 for IMF) clearly document the highly effective measures and timelines applied. There are two patterns in Viet Nam that are distinctly different from other countries (see Figure 2.7). First of all, containment measures were already put in place ahead of most other countries (other than China), as will be elaborated below (see 3.1). Besides being put in place by the end of January, measures were also much more stringent compared to other countries. Overall, it was indexed at 30-50 per cent. In comparison, rates ranged between 5 and 25 per cent in all world regions (Thi Phuong Thao Tran et al. 2020). Due to the combination of these two aspects, Viet Nam had a head-start of more than two months compared to European countries and the US. By the end of March/early April, regulations were tightened even further for several weeks (at nearly 100 per cent), and were much stricter compared to measures in any other country included in the IMF analysis.

*Figure 2.7 Assessing containment strategies in different world regions*




*source: Dabla-Norris et al. (2020, 4; based on Oxford University 2020)*

A similarly positive assessment was also made by Heath and Jin (2020) for the US-based POLITICO magazine on May 21. They calculated a matrix analysis with two parameters, combining implications for public health and implications for the economy. When cross-tabulating these two parameters, Viet Nam maintained a top position among all 31 countries included (see Figure 2.8).

*Figure 2.8 Assessing containment strategies in different world regions (Heath and Jin, POLITICO May 21)*

Source: iStock.com/kovop58

# 3. NAVIGATING THE GLOBAL COVID-19 PANDEMIC IN VIET NAM DURING 2020

When compared to any other country, Viet Nam represents a remarkable success story in containing the covid-19 pandemic, during the entire year of 2020 and until April/May 2021. As such, it was praised as “a stand out” (The Economist 2020/vii) and “a model case” (IMF 2020b), and even seen as a “road map” (IMF 2020c). However, the task of buffering the economic and social impacts of covid-19 has proven to be a much more complex issue. The good news is that in spite of global turbulence, throughout 2020 the Vietnamese economy proved to be highly robust. While economic growth rates have been declining as elsewhere, positive values have persisted in Viet Nam (for details see 4). Throughout 2020, optimism about a speedy recovery was widespread, as summarised by Khan Vu et al. (2020). Yet, their statement that this “puts the country on course to revive its economy much sooner than most others”, soon proofed over-optimistic.

As elaborated above, overall assessments for the Asian region have been rather bleak, with ADB’s Asia Economic Outlook raising concerns that “growth could underperform these already lowered forecasts” (Asakawa 2020, i). Overall, we follow (and did so even in 2020) a more cautious note, and feel the need to point out that “it takes two to tango”. On the one hand, there needs to be a national economy and a political system willing to rapidly continue its growth trajectory. On the other hand, there also needs to be a considerable global consumer market with both, sufficient purchasing capacity but also with a general consumer optimism, and willingness to spend available financial resources. The latter has been considerably affected across the world. Thus recovery, both outside and within Asia, is likely to take quite some time. Furthermore, the latest outbreak starting in April 2021 has sharply halted optimism, even in Viet Nam.

As outlined in the introduction, the following sub-chapters will focus on the impacts of covid- 19 in Viet Nam during 2020. The first part outlines the political regulations , and provides a brief overview about the core policies set in place by the Vietnamese government during 2020, from mid January onwards (3.1). This includes different modes of governance, such as Decisions, Directives, Decrees, and Resolutions from core political units, the Communist Party, the Prime Minister, and various Ministries. Due to its crucial importance to understanding the pandemic, we will then briefly summarise some studies that focus on the epidemiological and public health side (3.2). The following two chapters will provide an overview of macro-economic developments first (4) and then outline the core features with regard to labour markets (5).

## 3.1 Policy regulations to counterbalance the impacts of covid-19

When the ADB provided their assessment of the potential impacts of covid-19 in their annual Asia Development Outlook report, ADB president Asakawa succinctly noted that effective mitigation measures require “decisiveness, agility, coordination, and vigilance from policy makers and institutions” (2020, i/ ADB 2020c). In hindsight, for 2020 the Vietnamese Government had already taken all of these aspects into account, at that stage. Similarly, CIEM proposed that measures should be “drastic, determined, regular, and timely” (GIZ and GVN/CIEM 2020, 2), with the World Bank arguing that the government was acting “quickly and boldly” (ibid. 2020h, xii).

As was the case worldwide, during the early phase of the pandemic, the Government’s response mechanisms in Viet Nam primarily focused on public health measures to contain this highly infectious disease. One crucial step in this regard was the Vietnamese Government declaring ”Corona-virus” a national epidemic, on February 1, 2020. Along with tackling the public health risks of the pandemic, it was later seen as instrumental to buffer the impacts of the national economy by providing and scaling up social security schemes in line with both national and ASEAN policy guidelines and policies. Thus, by April 2020, public health measures were followed by economic policies to safeguard workers and businesses, as well as social policies for those either losing their work or some of their income.

As summarised by various studies, the Government launched an emergency plan immediately after the first case of covid-19 was recorded on January 23 (for details of the epidemiological response see 3.2, below). Most importantly, as briefly noted above, a National Steering Committee was formed instantly as an inter-ministerial agency. To contain the virus, border controls, programmes of targeted testing and extensive contact tracing, along with mandatory quarantine were introduced. After declaring a national epidemic, the country effectively closed its borders and airports to arrivals from China, first by suspending all flights to and from Wuhan, and by February 1, to and from all Chinese airports. By March 22, this was extended to all international flights, other than occasional repatriation flights in both directions (see UN 2020c; World Bank 2020h, and for overview see Table 1, below). In addition, mandatory quarantine was imposed for all international arrivals (for details see Thi Phuong Thao Tran et al. 2020; Quang Van Nguyen 2021, 157).

At the local level, all educational institutions remained closed from the lunar New Year (têt, in 2020 on January 25) until early May, applying to all levels from kindergarten to universities. While face masks and social distancing regulations had been set in place early, this was expanded to a full national lockdown on April 1. This included all non-essential public activities and businesses, other than food stores and pharmacies. By April 22, these strict measures were lifted, until at the end of July 2020, when a new wave occurred. At the same time, the country’s borders remained shut for the entire year, and beyond.

The first meeting of the National Steering Committee (NSC) for the Government’s covid-19 response was held on January 15 (UN 2020c, 11). Chaired by the Deputy Prime Minister, a “National Response Plan for the Novel Coronavirus Pneumonia (nCoV)” was compiled by January 20, with several subsequent revisions (January 31 and February 18). This plan outlined five scenarios for different levels of infectious spread. Stage 1 was to be implemented in case of imported cases only. Stage 2 defined a mild level of local transmissions of less than 20 cases, followed by Stages 3 and 4 for local transmission of less than 1000 cases, and less than 3000 cases, respectively. As the most severe scenario, Stage 5 implied large-scale community transmission (see GVN/NSC and UN 2020c, 11). In 2020, only Stage 1, and later on Stages 2/3 were reached, with the latter successfully avoided until the end of July.

The National Steering Committee comprises 23 members from several Ministries and Committees, as well as the media, including both press and radio/ TV, among whom four are women (GVN/PM 2020a; Bui Thi Thu Ha et al. 2020, 4). While the Ministry of Health and Health Systems was in charge of the epidemiological risk factors, other Ministries were similarly instrumental. The Ministry of Foreign Affairs coordinated the influx of foreigners and repatriation flights, supported by the Ministry of Transport and Aviation. The Ministry of Defense was tasked with setting up local isolation points for infected persons, in close coordination with local authorities (for further details, see Bui Thi Thu Ha et al. 2020, 4). The Ministry of Public Security, along with local authorities, had the task of tracing cases and isolating infected persons and their contacts (both direct and indirect), categorised as F1 - F5 (ie. 2-tier, 3-tier, 4-tier, and 5-tier contacts). The Ministry of Finance was tasked with allocating funds.

*Table 1 Measures taken by the Vietnamese Government for COVID-19 (compiled from various sources) **

| Dates | Regulation / event | Summary of content |
|---|---|---|
| January 15 / 30 | Decision No. 170/QĐ-TTg (by Prime Minister) | Establishing a National Steering Committee for control of the novel coronavirus disease; first meeting on Jan. 15 |
| January 20 / 31 | National Response Plan for the Novel Coronavirus Pneumonia | Response Plan defines 5 stages for controlling the pandemic (Stage 1: no local transmissions); Stages 2–4: local transmission of <20, <1000, < 3000 pers. |
| January 23 / February 1 | Instruction No. 358/CT-CHK (by Civil Aviation Authority) | suspension of all flights to/from a) Wuhan and b) all Chinese cities |
| January 28 | Instruction No. 358/CT-CHK (by Civil Aviation Authority) | Prevention and control of the Coronavirus outbreak; establishing a Rapid Response Team; MOH requested to provide daily up-dates (for details see Table 3 below) |
| February 1 | Directive No. 05/CT-TTg (by Prime Minister) | declaring the severe acute respiratory syndrome epidemic (caused by a new Corona type virus) |
| February 2 | Decision No. 173/QĐ-TTg (by Prime Minister) | strengthening information campaigns for the pre-vention and control of the outbreak; setting up communication channels |
| February 24 | February 24 Dispatch 1117/NHNN-TD (State Bank of Viet Nam) | guiding credit institutions with more details regarding these measures |
| March 4 | Directive No. 11/CT-TTg (by Prime Minister) | resolving difficulties and leveraging access to capital, credit, finance, tax, trade, electronic payment |
| March 19 / 22 | | Vietnam Airlines temporarily suspended international flights; closure of all airports, ports & borders |
| March 30 April 1 | Directive No. 16/2020/CT-TTg (& No.447/QĐ-TTg by PM) | strict social distancing rules nationwide for 15 days: leaving homes only for food and medicines; banning gatherings of more than two people; all non-essential factories / business companies shut down |
| April 8 | Decree No. 41/2020/ND-CP & | plans for a 62 trillion (US $ 2.69 billion / 2.29 billion Euro) fiscal package to support people affected by covid- -19 pandemic |
| April 9 | Resolution No. 42/ND-CP | |
| April 16 | Official Dispatch No. 3655/ BGTVT-VT (Ministry of Transport | transportation plan according to three area groups at risk of covid-19 (I: high-risk, II: at-risk and III: low-risk); for provinces in Group I / II all inter-provincial passenger transportation stopped (until 22 April) |
| April 24 | Decision 15/2020/QĐ-TTg | compensation payments for workers & enterprises |
| May 29 | Resolution 84/NQ-CP | delay of tax payments |
| May 29 | Resolution No. 954/ 2020/ UBTVQH14 | for Personal Income Tax (PIT), increasing limits from 9 million to 11 million VND |
| October 19 | Decision 32/2020/QĐ-TTg | Revision for Decision 15/2020/QĐ-TTg |

*. * for (other) public health measures see Table 4, below*

At the same time, the Ministry of Science and Technology, hand-in-hand with the Ministry of Information and Communication, were put in charge of handling information and sharing this with the public via a wide range of media outlets. This wide media coverage was extensively analysed by Viet-Phuong La et al. (2020), via a graph (see Figure A6, annex). These highly efficient and "innovative forms" of communication (World Bank 2020h, xii) were set in motion from February 2 onwards, and included mobile phones, social media (facebook, YouTube, Twitter, and the National platform, Zalo), TV and radio adds, as well as announcements via mobile vans, regularly passing through urban and rural areas. An animation by the Ministry of Health was shared, composed by Khac Hung and performed by Min "Ghen Co Vy", and animated by Hoang Diem Huyen (see cover page; for text see Box 2, annex). This video was uploaded on February 23, and garnered 74 (plus) million views worldwide by the end of 2020, and nearly 100 million by August 2021. Similarly, other video clips were shared on Tik Tok, partly inspired by an initiative launched jointly with UNICEF on March 29, known as #ONhaVanVui (#StayingHomeIsFun).

To mitigate the impacts of the pandemic on the national economy, a series of Resolutions and Decrees followed. In February 2020, the State Bank had already lowered its interest rates by 0.5 - 1 percentage points. Along with doing so, the Central Bank ordered commercial banks to follow suit, and offered US $ 12.4 billion (VND 293 trillion) in preferential credits to affected businesses (Fallak 2020, 1). As one of the first comprehensive policies to counter-balance economic difficulties related to the pandemic, the Prime Minister passed Decision No. 11/ CT-TTg on March 4 2020. The aim was to "resolve difficulties and leverage access to capital, credit, finance, tax, trade, electronic payment". It set in place several mechanisms to provide access to capital and regulate taxes, trade, and modes of payment. The budget estimate for these activities was calculated at VND 330 trillion (for details, see GVN/CIEM 2020, 5ff and 9).

This Decision addressed all core government bodies. The State Bank and the Ministry of Finance (Article 1) were tasked with reviewing and reducing administrative procedures and costs for enterprises, setting in place regulations for the Ministry of Industry and Trade (MOIT). Some of these focused on providing guidelines for simplifying administrative procedures (Article 2). In order to facilitate "production, business; promote export and import" (Article 3), MOIT was to support general businesses, while the Ministry of Agriculture and Rural Development (MARD) was put in charge of supporting the primary sector (AFF). To support them, the Ministry of Finance (MOF) was to "simplify administrative procedures for customs clearance, tax refund, tax deferral" (for summary see GVN/CIEM 2020, 3ff). Interestingly, this Decision also included a guideline to "Quickly recover and develop tourism and air transport" (Article 4), as it seemed feasible to attract tourists "from unaffected countries and regions" (ibid.) at the time. Obviously, this regulation was to become obsolete within days/weeks.

The article of highest importance for MOLISA was that in place to "Resolve labour-related difficulties" (Article 6). By mid/end of April, it was obvious that in addition to the containment of the virus, it would not only be highly important to support both national business enterprises but also households with members affected by job losses and lay offs. To do so, Resolution No. 42/ ND-CP on "Assistance for people affected by COVID-19 pandemic" outlined a comprehensive set of measures, followed by the Prime Minister's Decision No. 15/2020/ QĐ-TTg on April 24, providing "Regulations on the implementation of policies to support people facing difficulties due to the COVID-19 pandemic" (GVN/PM 2020d).

In order to implement Resolution No. 42/NQ-CP, a support package worth VND 62 trillion was passed, targeting the most vulnerable groups of the population. The Resolution specified seven different groups, along with their financial entitlements. In addition to poor and near-poor households, this included people entitled to social protection, people with revolutionary merits, family businesses, and also informal workers (see Table 2). Some groups were to receive these funds in addition to their on going transfer payments, mostly at 500,000 VND/month for a maximum of three months, whereas others were to receive transfers of up to 1.8 million VND/month. MOLISA was put in charge of coordinating the efforts of the different ministries and agencies (Article 4). As argued earlier, we assessed this policy as an "unprecedented social protection support package" (GVN/ILSSA 2020a, 70).

Resolution No. 42 also outlined funding mechanisms for provinces. Provinces that contributed 50 per cent of their revenues to the Central Government needed to fund these programmes from their own budgets. For the other provinces, government support was highest for the four mountainous provinces and provinces in the Tay Nguyen region (at 70 per cent), followed by other provinces (at 50 per cent) and 30 per cent for those contributing less than 50 per cent of their revenues to central government budget.

*Table 2 Measures outlined in Resolution No. 42/NQ-CP (April 10)*

| Articles | Beneficiaries | amounts for support |
|---|---|---|
| II/1 | A worker who has his/her employment contract suspended or has to take unpaid leave for at least 01 month because his/her employer and does not have adequate fund to pay wages due to covid-19 | 1,800,000 VND/month (for up to 3 months), beginning from April 01, 2020 |
| II/2 | An employer who is facing financial difficulties and has paid at least 50% of suspension allowance for their employees in accordance with Clause 3 Article 98 of the Labour Code during the period from April to June 2020 (worth up to 50% of total region-based minimum wages of suspended employees over the suspension period, but not exceeding 3 months) | may apply for an unsecured loan, at interest rate of 0% with a loan term of up to 12 months from the Vietnam Bank for Social Policies |
| II/3 | A household business that earns an annual revenue of under 100 million VND/year and has to suspend business operation from April 01, 2020 | 1,000,000 VND/month (for up to 3 months) |
| II/4 | A worker who has his/her employment contract terminated but is not eligible for unemployment benefit; a worker who does not have an employment contract and is laid off | 1,000,000 VND/month (for up to 3 months), from April to June 2020. |
| II/5 | A person with meritorious services to the revolution who is receiving monthly benefits | additional amount of 500,000 VND/month for 3 months from April to June 2020 (as lump sum) |
| II/6 | A social protection beneficiary who is receiving monthly benefits | additional amount of 500,000 VND/month for 3 months (April –June, as lump sum) |
| II/7 | A poor or near-poor household according to the national poverty standards as of December 31, 2019 | 500,000 VND /month for 3 months (April –June, as lump sum) |

Among these groups, people with revolutionary merits (group 5) were the easiest to identify, since the Government maintains updated lists, and local officials could easily access these. A similar procedure is also applicable to poor and near-poor households (group 3). Since these payments were in addition to their regular payments and paid as lump sums, administrative procedures were comparatively uncomplicated. On the other hand, labourers without contracts, particularly in the informal sector, were most difficult to identify, as documented from our interviews with government officials (see GVN/ILSSA 2020a, 70ff; for details see 5.8, below).

Decision 15/2020/QĐ-TTg included compensation payments for all employees who had lost their jobs but were not eligible for unemployment benefits. The Decision also specifies a comprehensive list of eligibility factors (for details see Table 3). Overall, the decision provided detailed regulations specifying the time frame as April 1 – June 30 2020 (Article 1). It also regulated that beneficiary enterprises should either not have any revenue or not have sufficient funds to continue paying wages/salaries. Importantly, Decision No. 15 not only explicitly included workers not receiving unemployment benefits (Article 5) but also those without employment contracts (Article 7). The latter were limited to a few specified occupations and workers with incomes "lower than the near-poverty standard". For household businesses, the regulation set the upper income limit at VND 100 million (Article 2). While this amount seems quite high, it is equivalent

## 3.2 Epidemiological aspects of the covid-19 pandemic during 2020

As mentioned previously, during 2020, the Vietnamese Government was exceptionally successful in containing the spread of covid-19, and international media have reported this extremely favourably (see Khan Vu et al. 2020; Heath and Jin 2020; Beech for The New York Times 2020; The Economist 2020/July). Thus, in spite of Viet Nam's 1200 km northern border with China and the first cases of covid-19 infections dating back to January 23 2020, the spread of the virus was contained both rapidly and effectively. Overall, during 2020, strict domestic lockdown measures were limited to 22 days in April, while at the same time the entire country remained closed to public international flights for the remainder of the year, and beyond. Interestingly, the Economist (2020/July 9), when assessing why South East Asian countries in general have been comparatively better off, provides two reasons, one being the "pre-existing proclivity for masks" (for details see Economist 2020).

To provide regular up-dates, GVN and WHO jointly publish a series of "Viet Nam COVID-19 Situation Reports" (2020a-d, 2021). As mentioned above, by the end of 2020, Viet Nam reported a total of 1,465 cases of covid-19 (GVN/MOH; WHO 2020d, 1). This is equivalent to a morbidity rate of about 1.6/100,000 (ie. 0.0016 per cent), based on a population size of about 90 million. Considering that a majority among the infected (809 cases, ie. 55 per cent) were imported cases, this rate is even lower, although by and large, most among the "imported" cases were Vietnamese returnees (91 per cent; ibid.). Even more uniquely, until July, mortality was reported at nil, and by the end of December a total of 35 deaths were reported. Above all, the daily numbers of new infections ranged mainly between 10-15, with these figures exceeded on a few days only (see Figure 1.4, above). Similarly, only 57 patients had been treated in ICUs over the entire year (ibid.). This is certainly a scale that is uniquely low for any country where testing is being done.

As covered widely by the national media, the first-ever cases to be diagnosed in Viet Nam were a 65-year old Chinese man and his son who had returned from Wuhan a few days earlier and had been struck with fever on January 17 (see Bui Thi Thu Ha et al. 2020). Following this alarming event, on February 1, the Vietnamese government already declared "corona-virus" a national epidemic (for overview of measures, see Table 4). Remarkably, this far-sighted decision was based only on six cases that had been diagnosed by then. These included the two cases mentioned above, as well as three Vietnamese nationals returning from Wuhan. What seemed worrying was the first case of "community transmission" – a receptionist in Khanh Hoa province who had come in contact with the returning Vietnamese nationals (see Vietnam Law and Legal Forum 2020). Certainly this decision was strongly influenced by the horrifying events (and draconic measures) unfolding across Viet Nam's northern border in China, and possibly some inside information.

When declaring the epidemic, the virus was classified as a "class A contagious disease, a group of extremely dangerous infectious diseases that can transmit very rapidly and spread widely with high mortality rates [..]" (ibid.). Following the setting up of a National Task Force (see Table 1; for details see 3.1, above), a Task Force within the Ministry of Health was also set up. The latter consisted of three units: a) a specialist group; b) an Information group, and c) a general report and logistics team (see GVN/MOH Decision No. 255 /QĐ-BYT, January 30; World Bank 2020h).

As mentioned above, the two minor waves in January and March mainly consisted of "imported" cases. This situation changed drastically during the outbreak in July 2020 (see Figure 3 above). Thus, on 25 July, Stage 1 (with mainly imported cases) ended, as community transmissions were detected on a much larger scale (see UN 2020c, 11), spreading from "patient 416" (Phuong Pham 2020). As argued above, when mapping the chronology of infections (see Figure 1.4 above), the most remarkable aspect is the scale of the graph, set at 90 persons as the maximum value (ie. a one-per-million), when compared to population figures. Thus, what seems to be a dramatic spike in July are incidences of 20-40 persons/day, and one singular day with 84 cases (GVN/MOH and WHO 2020c and 2020d, 5). The latter could even be due to cumulative testing/diagnosing.



to per capita incomes for a 2-4 member household earning about VND 2.05 –4.1 million per month.

The Government also specified procedures for accessing these funds. Within 3 working days after the enterprise had submitted the list, the social insurance agency was to certify the employee's participation in social insurance. The enterprise was then requested to send a dossier of request to the district-level People's Committee. The latter was scheduled to be appraised and submitted to the President of the People's Committee of the province within 3 days (ibid., 8). Within two working days, the President of the People's Committee of the province was requested to decide.

*Table 3 Measures outlined in Decision No. 15/2020/QĐ-TTg (dated April 24)*

| Articles | Specifics of eligibility and procedures |
|---|---|
| I 1 | Workers who have signed a labour contract or working contract before April 01, 2020 and are participating in compulsory social insurance; |
| 2 | Workers who have terminated their labour contracts or working contracts from April 01, 2020 to the end of June 15, 2020 but who are not eligible for unemployment benefit as prescribed by law; |
| 3 | Workers who have no income or his/her income is lower than the near-poverty level as prescribed; |
| * | Labourers without labour contracts who become unemployed shall be supported, if conditions are similar to those specified above (in terms of time frame, incomes, and legal residence in locality); applicable for workers in non-agricultural fields, such as peddling, retailing without fixed locations, collecting rubbish and scrap, goods loading and transportation, mobile lottery retail; |
| II 2 | An enterprise shall make a list of employees who temporarily suspend the performance of labour contracts or take unpaid leave, meeting the conditions specified in Article 1 of this Decision; request the grassroots trade union (if any) and the social insurance agency to endorse this List. |

As anticipated, the shutdown of all non-essential businesses had severe implications upon the liquidity of affected businesses. When preparing for the end of the lockdown, Resolution 84/NQ-CP (May 29) set in place a number of regulations that were devised to reduce operational costs of enterprises. This included a reduction of registration fees for manufactured items and cars (of 50 pc), as well as a 2 per cent reduction of interest rates. For those renting government-owned land, rent reductions were set at 15 per cent (see Vietnam Briefing 2020b; Thi Phuong Thao Tran et al. 2020). In order to finance the public health response to the pandemic, the Government has increased its regular health budget (UN 2020c, 12). Following a renewed outbreak of local/community transmission in late July 2020, VSS issued an Official Letter (No. 2418/BHXH-CSYT) advising social security authorities at both the provincial and centrally run cities to cover costs for covid-19 testing, at least temporarily (see Viet Nam Briefing 2020b; see also 3.2, below).

To finance these comprehensive measures, the Government's calculations were occasionally revised. In July, MOLISA stated that the support package for people facing difficulties caused by the covid-19 pandemic "will be worth VND 62 trillion" (ie. US $ 2.69 billion/ 2.29 billion Euro; GVN/MOLISA 2020d, GVN/CIEM 2020, 21)– an increase of VND 420 billion (ie. US $ 18.26 million / 15.55 million Euro) compared to the original estimate, and "supporting about 20 million people" (ibid. 2020d). Overall, budget needs were estimated at about VND 700 trillion, while at the same time, the decline in revenues was assessed at about VND 100-110 trillion (GVN/CIEM 2020, 8). In 2021, ADB assessed that the budget revenue during 2020 fell by 9.2 per cent (ibid., 331).

*Table 4 Measures and data related to the epidemiology of covid-19 (compiled from various sources)*

| Dates | Regulation / event | Summary of content | Q * |
|---|---|---|---|
| January 16 | Decision No. 125/ QĐ-BYT (by Ministry of Health) | stipulating guidelines for diagnosis and treatment of acute pneumonia caused by the corona-virus | WB |
| January 23 | Ministry of Health (MOH) | first two cases confirmed (from Wuhan) | WB |
| January 28 | Directive No. 05/CT-TTg (by Prime Minister) | establishing a Rapid Response Team; MOH requested for daily up-dates | WB |
| January 30 | Decision No. 255/ QĐ-BYT (by MOH) | On the Establishment of a corona-virus (NCOV) Rapid Response Task Force | PL |
| February 1 | Decision No. 173/CT-TTg (by Prime Minister) | declaring the severe acute respiratory syndrome epidemic (caused by a new Corona type virus) | VL LF |
| February 2/ March 7 | MOH | 14-day quarantine for all incoming travelers from virus-affected areas; all foreigners entering the country requested to fill in a medical declaration | WB |
| March 11 | WHO / Geneva | Covid-19 was declared as global pandemic | - |
| March 18 | Decision No. 963/ QĐ -BYT (MOH) | Promulgation of Interim Guidance for Monitoring, Prevention, and Control of covid-19 (defining confirmed and suspected cases) | PL |
| March 22 / 30 | MOH | patients number 100 and 200 recorded | WB |
| May 14 | MOH | patient number 300 recorded | WB |
| July 27 (until August) | MOH | second major outbreak with community trans-missions, in Da Nang city (followed by testing of 72,492 persons) | MOH |
| September 17 | MOH | a total of 551 case reported from these local transmissions, doubling the cases to 1066 | MOH |
| December 31 | MOH | annual infections at 1465 cases, with 35 deaths | MOH |

*. * sources and abbreviations (Q): (WB) World Bank 2020h, 7 (PL) Phab Luat*

*(VLLF) Vietnam Law and Legal Forum (MHO) Ministry of Health and WHO*

In contrast to most other countries, though similar to Japan (ELISA), testing was limited to suspected cases only, albeit highly targeted (see Economist 2020e). By the end of March, testing had been administered to less than 16,000 persons (Fleming 2020), and 350,000 by mid June (Dabla-Norris et al. 2020, 3). Yet, following the wave of community transmissions in July/August, testing was rapidly increased, mainly in Da Nang (317,000), but also in Hanoi and HCMC, at 120,000 each (GVN/MOH and WHO 2020c, 2). By the end of the year, testing had covered 1.39 million persons, and 20,000 alone during the previous week (ibid. 2020d, 8). While these rates for testing might seem critically low compared to most other countries with similar population sizes, Viet Nam had one of the lowest rates of infected cases among those tested. Positive testing accounted for merely 1 per mille (ibid; Pham Quang Thai et al. 2020), and thus compared favourably to rates in the UK and the US, where, during periods of low testing, positive rates were at times as high as 12-25 per cent (ie. 120 - 250 per mille; Piroth 2020).

On the other hand, the number of persons placed in quarantine was comparatively high, at 450,000 persons by June, sometimes even for third-tier contacts (ibid.), and 10,242,896 persons by the end of the year (GVN/MOH and WHO 2020d, 4). This was undertaken at either special facilities (both at military compounds and at hotels with special permissions) or at home, mainly for members of the diplomatic corps. Even at the end of the year, without any major outbreak, approximately 16,700 people were under quarantine (ibid.).

The situation reports (GVN/MOH and WHO 2020a/d) also provide some crucial information about both the regional spread as well as the age composition of infected persons. In terms of regional occurance, the North (Ha Noi and the Red River Delta) had seen the most cases in March, whereas Da Nang experienced the most cases in te summer (July) and the southern provinces were most affected in autumn/ winter (see Figure 3.2). In July, Da Nang was seen as the epicentre, and large-scale testing at the household level was initiated, as decreed by the Cities People's Committee in Plan No. 5857/ KH-UBND (GVN and WHO 2020b). With a total of 72,492 tests, this covered a third of all of Da Nang's households, in addition to students (ibid.). By September 2020, new cases were again limited to less than single-digit values on most days– a pattern that prevailed for the rest of the year, and until late January 2021. Yet, the dramatic increases from May 2021 onwards (GVN/MOH and WHO 2021) was a clear indicator that 2021 was to become a much more critical year.

Among those infected in summer 2020, a demographic analysis documents a peculiar age pattern of infections (and fatalities), differing significantly from other countries. Among both women and men, all age groups were substantially affected, besides those younger than 20 and older than 70. Yet, those most numerously affected were in their 20s and 30s (see Figure 3.1; for detailed data see Table A2, annex). In their detailed epidemiological analysis, Pham Quang Thai et al. (2020) have documented a distinct pattern between imported and local transmissions (see Figure 3.3). Based on a total of 270 cases (163 imported cases and 107 local transmissions) this confirms a specific age and gender pattern, particularly among imported cases, where the vast majority was aged 20-35. This is not too surprising, as this group is generally a highly mobile one. In contrast, among the community transmission the two age groups with the highest incidences were those aged 40-44 and 45-50. The latter could possibly be interpreted as the parent generation of those who had returned infected from abroad (note that the authors have used two inconsistent scales for the two groups, which might cause confusion).

*Figure 3.1 Gender and age pattern of persons diagnosed with covid-19 in Viet Nam*

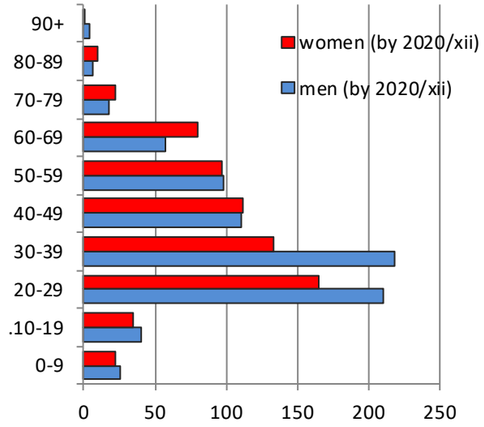
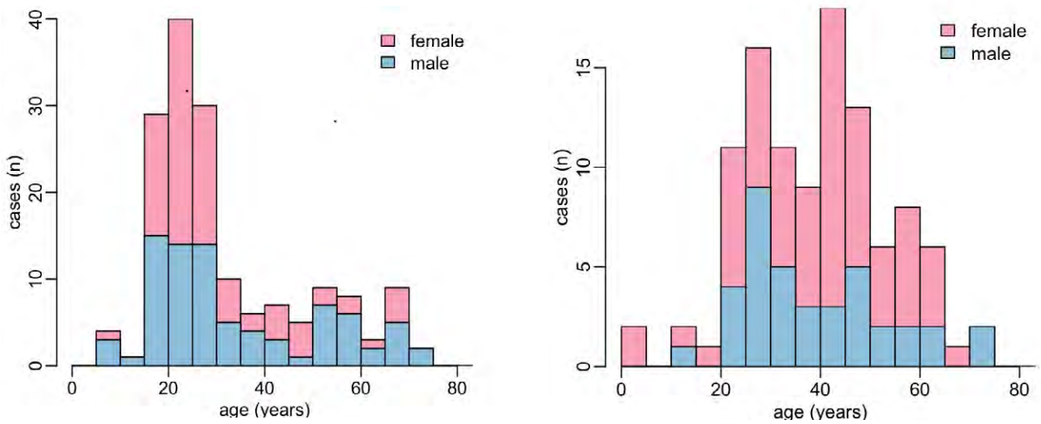



*Figure 3.2 Regional pattern of covid-19 in Viet Nam during 2020 (GVN/MOH and WHO 2020d, 4)*

*Figure 3.3 Gender and age of imported (left) / local transmissions (right) of covid-19 in Viet Nam (from Pham Quang Thai et al. 2020, 5)*




A second distinctive demographic pattern is that infected women outnumbered men, both among the imported cases but even more significantly among the local transmissions. Among the latter, this is most pronounced in the age group 40-45, where women account for nearly 80 per cent of all cases. Leaving aside considerations about the small sample size, there are two possible explanations for this phenomenon. One is that women are generally more likely to contract covid -19. However, this assumption is not in line with any other study or data from GVN/MOH and WHO (see Figure 3.1). Such studies had demonstrated a gender composition (women : men) of 500 : 530 persons by September, and 677 : 788 by the end of the year (ibid. 2020c and 2020d, 5), indicating a gender proportion of 48.5 per cent (by September) and 46.2 per cent for the entire year.

This pattern does not correspond to worldwide data (see GUK/ONS 2021 for UK, Piroth et al. 2020 for France, or Chaolin Huang et al. 2021 for China). A second interpretation is that women were/are more likely to seek medical assistance and thus allow for their cases to be detected and reported. As this could be particularly pronounced among local residents, it could explain the demographic pattern described above. If so, then there could have possibly been a considerable number of un-detected and thus un-diagnosed covid-19 cases among men. If so, then this situation could have easily escalated and streered Viet Nam's success story into quite a different direction, as was the case in 2021.

Source: Elvira Graner (Ninh Binh 2021)

# 4. ANALYSING (MACRO-)ECONOMIC DEVELOPMENTS RELATED TO THE COVID-19 PANDEMIC IN 2020

Global assessments about the economic impacts of the covid-19 pandemic generally portray a rather gloomy picture. Above all, over the course of the year, these have been gradually "adjusted", and usually for the worse. As briefly outlined above, it is our core argument that labour markets are intrinsically embedded in and intertwined with macro-economic developments. Thus, prior to delving into an analysis of labour markets, we feel the strong need to at least provide an overview of the core features of the latter. This section will first of all briefly summarise various exercises for recalculating GDP growth rates that have been undertaken over the past year (4.1), and then address the shifting focuses in terms of services, tourism (4.2) and manufacturing (4.3). To illustrate these macro-level trends, it we will then summarise studies that provide crucial insights at the business level (4.4), from the World Bank and VCCI, as well as ILSSA and DANIDA. The last part will then focus on future outlooks (4.5) highlighting that the focus has shifted to handling what has been generally termed as "the new normal" (World Bank 2020/July, UNCTAD 2020). This is likely to be quite different from the status quo ante, prior to the pandemic.

It is important to (re-)emphasise that it is a highly complex exercise to clearly distinguish effects that were/ are primarily due to the covid-19 pandemic, and circumstances which might have occurred anyway. Thus, there is a considerable degree of what is termed in development studies as "attribution gaps" or "evaluation gaps" (Vaessen 2017; CGD 2006; Stern et al. 2012). Generally, subsuming several aspects and causal links under one umbrella is questionable and might give rise to misleading interpretations. As briefly mentioned above, the Economist's outline of "The year in 2020" (2019) also included an article on trends of "recession", even back in 2019. Similarly, ADB in its Asian Economic Outlook characterised 2019 as a "luck luster year" (2020c, xii). Thus, it will be an important task to identify trends that were possible to detect prior to the pandemic, epitomised by the Economist as "pre-existing conditions" (Easton/Economist 2020, 34).

Compared with the Asia-Pacific region as a whole (1.2, above), during 2020 the economic impacts of the pandemic in Viet Nam have been far less damaging than in most other countries, both in the region and worldwide (see ADB 2020a/, 2020c; ILO 2020; IMF 2020b; ASEAN 2020a; pwc 2020b; WEF 2020; World Bank 2020d/ 2020h). As briefly outlined in the policy section (3.1), the country's exceptionally early and effective measures have proven highly successful. Thus, although growth rates needed to be revised to lower levels, they continued to remain at positive values. Nevertheless, what the UN has termed a "weak global demand" (2020c, 28) will certainly continue to have negative impacts upon the Vietnamese economy, and possibly for quite some time. Even in pre-pandemic years, integration into global commodity chains has been highly sensitive to global turbulence and recession/s. What has been, and will continue to be, crucial is what the IMF has captured as effectively "Navigating the Pandemic" (IMF 2020e).

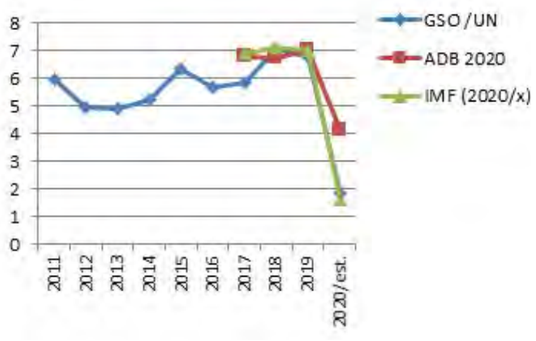
## 4.1 (Re-)Calculating GDP growth rates

For Viet Nam, macro-economic level national GDP growth rates have remained at around 4.9 – 7.06 per cent per year over the past decade (see Figure 4.1). In line with the country's economic planning policies over the past decade, for 2020, the Government set the target for GDP growth at 6.8 per cent (see GVN/MPI 2016 and 2019). Early assessments in February raised hopes that, although growth rates needed to be re-adjusted, these revisions would be moderate. While initial revisions estimated at down-scaling GDP by less than 1 per cent, from April/June onwards, this revision was drastically increased. By the end of the year, GDP growth rates had declined to about 2.91 per cent (see GVN/MOLISA and GVN 2021, VCCI and World Bank 2021, ADB 2021e).

Initially, estimated revisions proposed lowering growth by 0.53 per cent (down to 6.27 per cent), in case it was possible to control the virus. In case this was not be possible, the estimated growth rate was reduced by 0.71 per cent (down to 6.09 per cent; see Thoi Nguyen 2020, 1). By April, revised growth rates had already been lowered, and by June they were lowered even further. GVN/CIEM cited MPI (April 2020), projecting GDP growth rates at 5.32 per cent "if COVID-19 is under control in Q2/2020, or 5.05 % in case the outbreak lasts until Q3/2020" (ibid., 6). They also cited an assessment made by the IMF (also from April), which "seems to be more pessimistic and forecasts the growth rate of just 2.7 %" (ibid.). In summary, they point out that data "should be interpreted with caveats" (ibid.) and add that "the year 2020 might witness tremendous economic difficulties for Viet Nam" (ibid., 6).

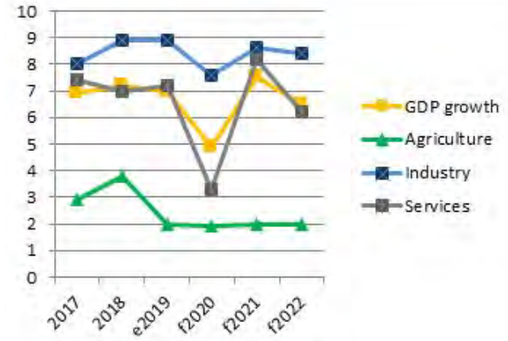
Similar re-assessments were also made by a wide range of international organisations. In March, the authors of a World Bank report argued that GDP growth rate declines were expected to be about - 0.5 per cent a month (ibid. 2020j, 2), and suggested a 3-step strategy in order to counterbalance the effects. In March/April, other authors from the World Bank compiled comprehensive country profiles for the entire Asia-Pacific region, including Viet Nam (2020c, 208). These were yet again more optimistic, and expected GDP growth rates to decline to only 4.9 per cent in 2020, and rapidly recover to 6-7 per cent by 2021 and 2022 (see Figure 4.2). A slightly lower assessment was provided in the ADB's Asian Development Outlook, re-adjusting their figure from April (at 4.8 per cent growth) to 4.1 per cent (ADB 2020c and 2020f, 11). Yet, these rates were soon to be further revised.

*Figure 4.1 Comparing different assessments for GDP growth rates (based on respective sources *)*




** data based on GVN/GSO 2020, UN 2020c, 28*

*Figure 4.2 Monthly exports of textiles/footware during 2020*




From May onwards, declining GDP growth rates were assessed at significantly higher values. The IMF re-adjusted growth rates initially to 2.7 per cent (IMF 2020b, 5; Vietnam Briefing 2020c), but later to 1.6 per cent, prior to raising it again to 2.4 per cent in mid-November (Hai Yen 2020). Similarly, the UN calculated growth rates at just 1.81 per cent (see Figure 4.1; for data see Table A3, annex), following GSO's revised rates of 0.36 per cent for Q2, and later on 2.62 per cent for the third quarter (2020e, 1). ASEAN, in their Policy Brief, cited the ADB, revising rates for developing countries in Asia from 5.2 to 2.2 per cent, and for ASEAN countries from 4.7 per cent to 1.0 per cent. Overall, the World Bank was slightly more optimistic, and lowered their estimate only to 2.8 per cent. At the same time, they added that "with less favorable external conditions, the economy will expand by only 1.5 per cent in 2020" (2020h, xiii; see Figure 4.2, above). Commenting on these gradual revisions, ASEAN highlighted that "many countries did not anticipate the subsequent aftermath" (ibid. 2020a, 4) – an observation that can be applied to all major international economic outlooks.

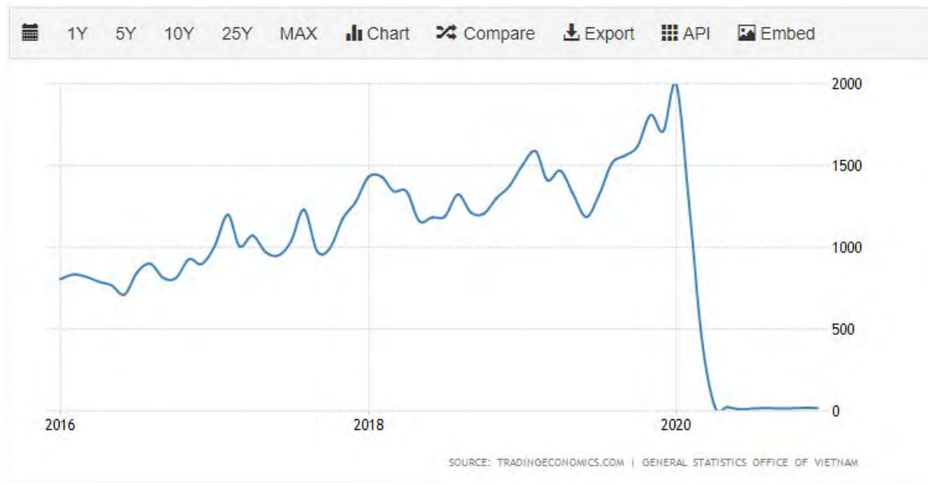
## 4.2 Shifting focus – from services and tourism to manufacturing

In addition to revising GDP growth rates, studies assessing economic declines have also changed focus during the course of the pandemic. For the Asia-Pacific region (see 2.1), tourism and the hospitality industry (including food services) were an early focus, but this later on changed to other service industries and manufacturing. In tourism, losses have been obvious. Once airports and borders were closed in late March, both the hospitality industry and aviation were hit severely. In July, the Economist stated that at a global scale, the pandemic was "catastrophic" for tourism (2020e). VN Briefing cites the Ministry of Culture, Sports and Tourism, assessing losses for 2020 at up to US $ 23 billion (2020d, 1). Again, this assessment was considerably higher than it was in March, when the ADB estimated a loss of US $ 1.0 to 2.84 billion, in best and worst case scenarios, respectively (2020b, 13).

By the end of the year, stock taking of the tourism sector was a fairly gloomy exercise. Tourist arrivals plummeted from a record 15 million in the year 2019 (World Bank 2019a, 11) to merely 3.84 million (Trading Economics 2020, based on GSO data; see also GVN/ILSSA 2020b, 28). This brought a drastic halt to a most promising start, as January 2020 had witnessed the highest ever monthly tourist arrivals, of more than 2 million persons. The visualisation of these figures below resembles a cardiac arrest (see Figure 4.3). This level even undercut figures from 2010, when figures were at about 4 million prior to a gradual increase over the following decade (World Bank 2019, 11). During successive years, in January arrivals had constantly increased from less than 1 million in 2016, and about 1.6 million persons in 2019.

The closure of the country drastically changed the optimistic outlook that many economists had for tourism. In 2019, the World Bank focused its annual report, "Taking Stock: Recent Economic Development in Viet Nam", on tourism, arguing that the country was "establishing itself as one of Southeast Asia's top tourist destinations" (ibid., 11). They also argued that the country had "successfully captured market shares from its Southeast Asian competitors" (ibid.). This prominent position was also confirmed by Viet Nam winning the World Tourism Award for two consecutive years (see GVN/GS0 2020h, 29). Overall, in 2019, the tourism industry in Viet Nam exceeded sales of VND 601 trillion (about US $ 26.1 billion/23.12 billion Euro), accounting for 12.2 per cent of all domestic trade (ibid., 604).

*Figure 4.3 Monthly tourist arrivals in Viet Nam (2016 -2020, Trading Economics based on GSO 2020)*



In terms of the aviation sector, Vietnam Airlines alone estimated losses at US $ 1.3 billion, with half of its 20,000 staff on unpaid leave (Vietnam Briefing 2020/May, 8). By April 2020, they had already reported a drop in revenues of VND 6.7 trillion (US $ 287.6 million) for the first quarter, most likely primarily during March. If so, total annual losses may well have reached US $ 2- 2.5 billion. In their Economic Impact Assessment, the UN stated that the contribution of this sector to GDP was down by 20 per cent for the first half of 2020, proposing that the aviation sector suffered the "heaviest losses" (2020c, 27). Since the first quarter had been fairly regular, this would imply a loss of about 35-40 per cent during the second quarter. As mentioned above, earlier policies had anticipated the re-opening of tourism to take place sooner, allowing for the influx of tourists from "safe countries of origin" (see 3.1). Since this term became obsolete within weeks, the Government maintained its travel ban for the entire year, and beyond. Once the country reopened after its national lock down in April 2020, a policy to counterbalance these losses was to considerably encourage domestic tourism and travel. However, this could neither compensate for the magnitude of the loss of international tourists, nor the critical losses of foreign currency earnings.

## 4.3 Manufacturing – global supply chains and global consumer markets

While the World Bank assumed that services were to decline severely (from 7 per cent growth to 3 per cent), the impact on industrial production was assessed as much less significant, declining from an estimated 9 per cent to 5 per cent (see Figure 4.2; for detailed data, see Table A4, annex). Yet, we would counter-argue that manufacturing is a crucial sector, particularly in regard to labour markets for women and near-poor households (see 5.4 and 5.5, below). Overall, exports in 2020 were expected to total about US $ 121.2 billion, evidencing a slight decline (1.1 per cent) compared to 2019 (UN 2020c, 27). Interestingly, growth of 5 per cent was recorded in manufacturing, primarily due to the pharmaceutical industry growth (plus 27.9 per cent), along with electronics and optical products (at 9.8 per cent each). While the UN highlights that garments/textiles had a growth rate of 2.8 per cent, a graph indicates a loss of about 15 per cent (ibid. 2020c, 28). The crucial role of exported goods for Viet Nam's GDP was also pointed out in several other economic studies, particularly in comparison to other countries in East Asia (ibid. 2020c, 4).

Overall, for manufacturing, and particularly for garments (and footwear), these declines were due to two different factors. During the early stage of the pandemic, supply chain difficulties were seen as substantial bottlenecks or "disruptions" (Vietnam Briefing 2020/May), while volatile consumer markets were of high concern later on. In May, Vietnam Briefing listed a number of the major industries affected, including "textile and apparel, leather and footwear, automobile parts, and electronics". For the automobile industry, imported supplies amounted to nearly US $ 4 billion in 2019 (ibid.), with the prevelant logic of stock piling supplies for 2-3 weeks for low-value items and 2-4 weeks for high-value inputs, such as GPS systems for cars. Notably cases include Ford and Honda, where production had to be suspended due to lack of materials. Overall, the share of costs for imports needed is substantial, and had gradually increased from 36 per cent in 2005 to 45 per cent in 2015 (World Bank 2020j, 9).

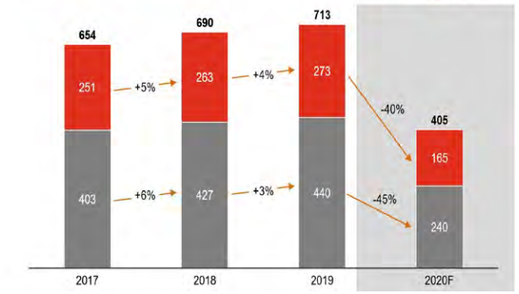
Similar concerns about supply chains have also been raised by other economists. ILO assessed that closing the border with China resulted in a "disruption of up to 70 per cent of material supply for many industries such as garment, footwear, and electronics" (2020i, 14). Adding a longer-term perspective, ASEAN, in their April Policy Brief on covid-19, voiced fears that these disruptions in global supply chains "may even result to the diversion of trade and investments to other regions in a bid to soften the risk of production stoppage arising from these disruptions" (2020a, 5).

While it was possible to manage supply chains relatively early, volatile or declining demand and contracting world markets remained a much more complex and long-lasting concern. Overall, lockdowns across the world were seen as "leading to massive reductions in economic activity" (ILO 2020b, 1) and "thus severely affecting the country's economic activity" (ibid.). This was also captured by ASEAN, assessing that the major markets were "reeling from the supply and demand shocks" (2020a). Consumer markets had been hit severely, which may have long-lasting negative impacts (ADB 2021).

When assessing global commodity trade, pwc estimated that for Viet Nam, declines in exports to the US could amount to around 40 per cent in 2020, and declines to European markets to 45 per cent (ADB 2020, 5; see Figure 4.4). Given the protracted desolate economic situation in the US and in several European countries, it is likely that these challenges will continue for some time. In its Asia Economic Outlook, ADB's president Asakawa correctly predicted that "outbreaks could worsen in more countries, and containing them could take longer than currently projected" (2020, i). Mapping the importance of different export markets, ILO (2020e) developed a graph highlighting the high share of exports to the US, in addition to several European markets (Germany, UK and the Netherlands), and Asian countries, including China, Japan, Korea and Hong Kong.

The negative impacts of the pandemic are clearly demonstrated in manufacturing – a sector not only of importance for exports but also for employment generation (see 5.1 and 5.5, below). Two studies that capture these critical developments comprehensively are Do Quynh Chi's analysis for ILO (ILO 2020i) and for FES (Do Quynh Chi 2020). For the garment sub-sector, the ILO study cites the Vietnam Textile and Apparel Association (VITAS), noting that "74 per cent of their member companies experienced a reduction of orders by 30 per cent or more in the first quarter of 2020" (ibid., 15). Since the first two months of 2020 are likely to have been regular, declines in March must have been quite dramatic.

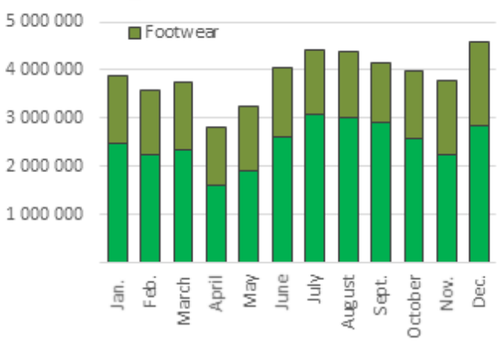
*Figure 4.4 Expected impact on apparel consumption (from pwc 2020c, 11)*




Do Quynh Chi's studies also provide illustrative evidence at the business level, indicating that many orders were either "delayed" or entirely cancelled, often at short notice. In other cases, production was completed but products needed to be sold at lower rates, reducing profit margins towards or even beyond a critical threshold. Some of her case studies exemplify this situation vividly. For instance, she recounts that a CEO of a garment company was demanded to grant a price reduction of 70 per cent. Similarly, many orders for a seafood processing unit were cancelled, and later on had to be sold off at lower rates (ibid., 15). Such practices curtailed liquidity drastically. These issues have also been captured by studies undertaken by

The Financial Express cites GSO, noting that by the end of October, total exports of garments had accumulated to US $ 24.8 billion, and that total exports for 2020 were estimated to only reach about US $ 32 billion instead of US $ 40 billion, as initially projected (ibid). Yet, based on official export data published in 2021, exports of textiles declined even more than expected, amounting to just US $ 29.8 billion, in addition to US $ 16.8 billion for footware (GVN/GSO 2021). Over the course of the year, exports had the lowest values during April and May 2020 (see Figure 4.5, below). Nevertheless, this 25-33 per cent decline is a much better outcome than what was experienced at production sites in other countries, such as Bangladesh. There, exports in April declined by 84.8 per cent (see Global Times 2020). It would be interesting to analyse to what extent, production has been linked to been replacement orders for potentially lower quality products, such as face masks.

*Figure 4.5 Exports of textile and footware during 2020 (based on GSO data)*




ILSSA. Government schemes (see 3.1, above) could to some extent buffer the impacts of these challenges, but foreign currency earnings were lost, both at the entreprise level as well as at the state level. Thus, these macro-economic shifts went hand in hand with high numbers of bankruptcies. With 35,000 bankruptcy cases, this figure exceeded the number of the ones newly established (Vietnam Briefing 2020b; GVN and ILSSA 2020a/2020b).

## 4.4 Some insights into the company level

Insights into impacts at the business level can be obtained from two World Bank studies, as well as a study by GIZ and VCCI (2020). One of the World Bank's studies was conducted as part of their global "Business Pulse Surveys". Based on a sample of about 500 companies, the report highlights that the lockdown had "a significant but temporary effect on the operational statuses" of companies (Tan and Trang Tran 2020, 1). A similar sample size (n=550) was the basis for the GIZ and VCCI report, which shed light on aspects related to different company sizes. Primary data from ILSSA (for DANIDA) focuses on household enterprises, interviewed between June and August. The most comprehensive study was undertaken by VCCI with support from the World Bank and AusAid (published in 2021). Based on more than 10,000 companies, their report is linked to their annual Provincial Competitativeness Index (PCI), covering mainly private domestic businesses, but also some FDI companies, at a ratio of about 85:15 (ibid., 1). In summary, the authors argue that the covid -19 pandemic "has wreaked havoc on businesses on several fronts, resulting in various multifaceted effects and a plethora of challenges to business performance" (ibid.).

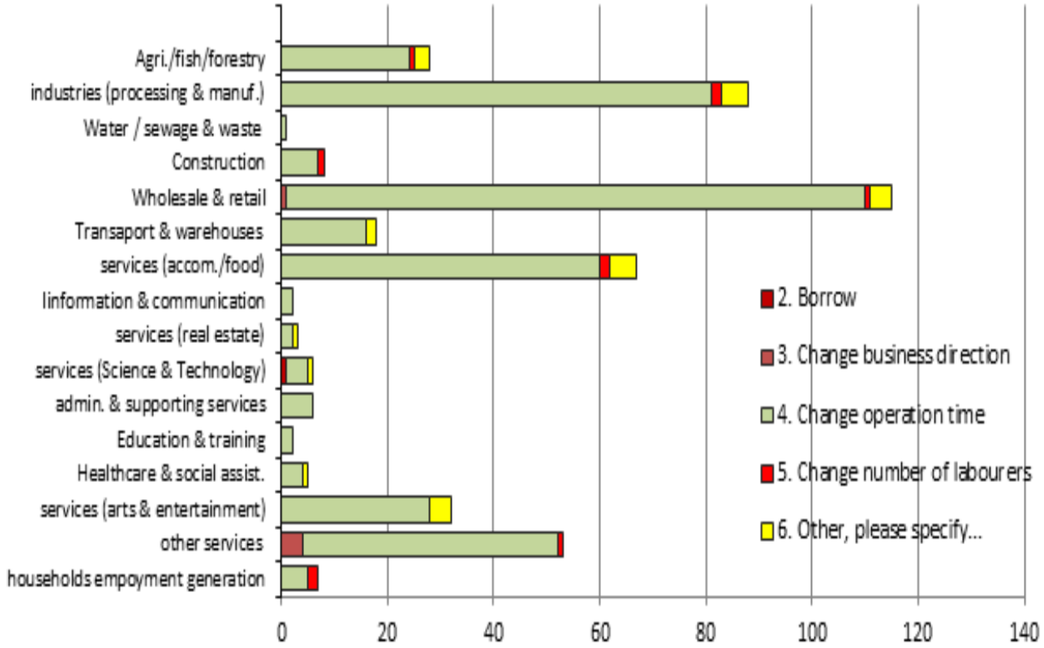
The World Bank's Business Pulse Survey is based on companies in the formal sector from 16 provinces. For 2020, it reported that many companies expected "highly negative growth rates of [minus] 27 per cent for sales and [minus] 20 per cent for the labour force" (ibid., 1). Decreased cash flows were reported by two thirds of all companies, and were highest in agriculture (75 per cent) but were also substantial in manufacturing (69 per cent). Surprisingly, decreased access to finance was not mentioned as a severe issue. It was reported by an average of 20 per cent of all companies, and only 11 per cent in the manufacturing sector (ibid., 5). At the same time, only around 20 - 30 per cent of companies had received government support funds, either due to inelegibility or complicated proceedures – two issues also addressed in the GIZ and VCCI study (2020, 86). Inexplicably, a high number among those not receiving funds mentioned that they were not aware of these schemes (34 per cent), in addition to 45 per cent who doubted their elegibility and/or thought that the application process was too complicated (Tan and Trang Tan 2020, 5).

The GIZ and VCCI Report clearly documents that in terms of revenues, financial losses were highest among micro-enterprises. Among them, 43 per cent experienced losses amounting to more than 50 per cent, whereas this figure was less than 24 per cent for large-sized companies. Yet, even among the latter, a large share experienced losses of 25-50 per cent. Interestingly, nearly 25 per cent of medium-sized companies reported experiencing no losses, similar to 18 per cent among micro-enterprises. Accordingly, the incidence of changes to the labour force was lowest among medium-sized companies. Among these, 61 per cent of all companies were able to retain their labour force. On the other hand, among micro-enterprises, one fourth of surveyed enterprises had to lay off more than 50 per cent of their labour force. As confirmed by other studies as well, most of the changes to the labour force took the form of "temporary leave" (ibid., 27).

In terms of analysing changes among small businesses at the household level, a study carried out by ILSSA for DANIDA provides some crucial insights. Based on about 440 household level enterprises, the most significant changes during the covid -19 pandemic of 2020 were connected to operation times (see Figure 4.6). Interestingly, taking out loans and borrowing was rarely reported, and reducing the number of labourers seemed to be an exception rather than a widespread phenomenon (see Figure 4.6, below).

Changes in regard to labour costs have been captured by a World Bank study (2020d). Measures to save labour costs took various forms, including reducing working hours (23 per cent) and/or wages (20 per cent), in addition to "granting leave" (14 per cent). Yet, only among a small number of companies (12 per cent) did leave involve the continuation of payments. Compared to these measures, lay offs were rare (15 per cent). Interestingly, 8 per cent of the surved companies even recruited workers (ibid., 3). Reducing working hours was the most common measure among large companies (42 per cent). Regionally, this measure was least common in Ho Chi Minh City (at 29 per cent) and in terms of sectors, it was least common in commerce (26 per cent). In comparison, this measure was more commonly taken in both agriculture and manufacturing, at 37 per cent in both sectors (ibid., 7). Much higher levels of laid off workers were documented by the VCCI and World Bank study (2020). This may be due to a different methodological approach, since their study does not specify other forms of reduced work, and thus "lay offs" could potentially comprise all the forms noted in the World Bank study, as well.

*Figure 4.6 Labour force changes among companies (calculated from ILSSA / DANIDA 2020 data set)*




Overall, the VCCI and World Bank study documents that lay offs in the domestic sector exceeded those at FDIs. When disaggregating lay offs among manufacturing companies, electronics and electronic equipment were least affected (at 22-24 per cent), a pattern in line with Do Quynh Chi's study (2020). This rate was higher for vehicles, garments and metal, at 39-50 per cent (for details see Figure A7, annex). Among surveyed companies, lay offs affected an average of 25 - 33 per cent of the labour force among private domestic companies but only about 15-20 per cent among FDI companies. At the same time, revenue declines were prevalent in most companies across all sectors, both among private domestic and FDI companies, at 50-80 per cent (see Figure A8, annex). Overall, average revenue declines ranged between 30-40 per cent, and were highest in information/communication and personal service sectors, at 42-60 per cent (for details see Figure A9, annex).

## 4.5 Assessing the Future – balancing optimism and realism

Generally, assessments of recovery and future trends are characterised by a high degree of ambivalence, but also strong optimism. In terms of exports, ILO argues that "the recovery [...], which relies on the US and European markets may not happen soon" (2020h, 14). Similar assessments have been provided in most studies, including by the ADB, both in 2020 and 2021 (2020c, 2021e). Again, earlier assessments were more optimistic, and predicted a speedy recovery. Declines were most evident in the second quarter, while by August, recovery was assessed as having gained momentum, and by the fourth quarter, to be "back in full swing". On the other hand, in October the World Bank epitomised the situation as a "precipitous fall" (2020h, 1). Nevertheless, they added that "the international picture is cloudy, albeit with a slim silver

lining" (ibid.). They attrituted this rather optimistic view to the fact that "trade [was] beginning to recover, and after a dramatic exit, short-term capital [had] quietly returned" (ibid.). This trend has again been reversed, following renewed lockdowns across most of Europe during autumn/ winter 2020, and the lock down in Viet Nam in 2021.

A moderately optimistic outlook was evident with regard to tourism. As early as May, Vietnam Briefing stated that "the recovery of the industry seems on track" (2020d / 2020d). In October, the UN predicted that exports of services would "recover slowly, even as restrictions on international travel are lifted" (2020c, 29). At the same time, they argued that it would take a while until international tourism would return to previous levels, "as holiday makers reduce discretionary spending to pay down debts accumulated during the pandemic" (ibid.). We would counter-argue that months of worldwide national lockdowns and travel restrictions across Europe/Asia are likely to lead to a substantial surge in tourism, at least among those still in a position to afford it. Since during 2020, and until summer 2021, Viet Nam was viewed as among a few moderately safe destinations worldwide, it could become a major destination in time. The more decisive constraint will then be the Government's restrictions in terms of keeping the country closed and not issuing visas. The opening up of trial areas (such as Phu Quoc) will certainly be a major step in this regard.

On the other hand, spending on many other non-essential items, including garments/footwear and electronics, might be both minimised and delayed, as both companies and households have experienced more or less severe income declines globally. Spending patterns among lower-and middle-income households might become (and remain) more cautious, as a result. While the surge in sales of electronic items might seem to contradict this argument, higher spending could be due to those who have not been affected, whereas most other groups/companies might need to delay their purchases for months, if not years.

Source: iStock.com/Pham Hung

# 5. ANALYSING LABOUR MARKETS IN RELATION TO THE COVID-19 PANDEMIC THROUGHOUT 2020

When assessing the overall changes to labour markets during 2020, analysts argue that the pandemic has not only increased unemployment, but that it "has translated into a deterioration of labor market conditions" (see UN 2020c, 28). On the whole, throughout 2020, the labour force was characterised by the following: First of all, underemployment rather than unemployment was more prevelant, which needs to be addressed as a major impact and issue of concern. Alongside this, boundaries between the employed and unemployed have become blurred, unsettling the perceived binary positioning of these two categories. As a consequence, overall figures on unemployment and underemployment only partially capture the significant changes occurring within labour markets. For a clear analysis of underemployment, data are being provided by GSO in their quarterly LFSs, and by MOLISA and GSO in their Labour Market Updates (LMUs) During 2021 the impacts of the covid-19 pandemic in Viet Nam have been even more significant and protracted. Thus, analyses of the changes that occurred during 2020 is paramount to a more comprehensive understanding of changes occurring within labour markets today. As argued above, we see this report as a building block doing so.

Secondly, a high number of workers have lost their regular employment in the formal sector. Many among them have either compensated for this loss by shifting to the informal sector, or by remaining in the formal sector, but without their previous contracts or social security benefits (or a combination of the two). We anticipated strong fluctuations between the two sectors; however, actual numbers were at a much lower scale than expected. Thus, we would argue that many changes cannot be captured by analysing regular data bases, and we emphasise the need to study these shifts in much more detail (see 6.2 below). Thirdly, a critical consequence of these developments has been a decline in incomes, the scale of which can be quite significant. Such declines are difficult for all groups to cope with, but particularly for those in the lower income brackets, who can easily fall below poverty lines. As a concequence, it is crucial to set in place public support schemes that can buffer the negative consquences of income declines for vulnerable households, in the form of social assistance schemes.

As argued above, there is a fundamental difference between the formal and informal sectors, in terms of the level of regulations from the political side, such as following the Labour Code. At the same time, we hope to catalyse discussions, both at the conceptual as well as the empirical level. While generally, social impact analyses seem to suggest clear-cut reasons for changes, these approaches have significant limitations. Thus, there is an overly strong tendency to attribute all changes/declines during 2020 to impacts of the covid-19 pandemic. However, while it is easy to compare labour force data for different quarters/ years and to track statistical changes, the reasons for these changes might be much more complex, and can usually not be assessed from regular sources.

Again (see 4.1), changing labour markets could be attributed to a range of "pre-existing conditions" (Easton 2020, 34) and/or to co-prevalent trends. This severe methodological constraint needs to be kept in mind for any type of (impact) analysis, but even more so for an analysis of a phenomena complex field as the covid-19 pandemic. Similarly, another aspect to be kept in mind is that "net" changes are highly likely to only partly reflect actual dynamics. Overall, when analysing the labour force in Viet Nam, the impacts of the covid-19 pandemic during 2020 seem to have been moderate, particularly when compared to neighbouring countries, or even worldwide. At the same time, there are substantial gaps between absolute changes in the labour force, at about 2 - 5 million persons (see 5.1), and those assessed to be "negatively affected", at about 31 - 32 million persons (GVN/ MOLISA and GSO 2020b). Overall, impacts on the formal labour market were identified as stronger and longer lasting. On the other hand, impacts on workers in the informal sector (as well as those with informal "contracts" within the formal sector) were more existential, due to lower general wages and higher rates of poverty levels, accordingly. Overall, women were more significantly affected, particularly in the informal sector.

Methodologically, our analyses is based on both primany and secondary sources. The latter are mainly based on GSO´s quarterly Labour Force Surveys (LFSs; GVN/GSO 2020a-d), as well as MOLISA and GSO`s quarterly Labour Market Updates (GVN/MOLISA and GSO 2020a-d). Additional analyses have been provided by GSO´s covid-19 analyses, compiled from the second quarter onwards (GVN/GSO 2020e-g). Primary data was collected during the summer of 2020 for two complementary studies by ILSSA. These assessed impacts on informal and formal labour markets, for GIZ and the HSF, respectively (GVN/ ILSSA and GIZ 2020a and GVN/ILSSA 2020b; the first published as giz and ILSSA 2021). As has been outlined, for the macro-level (4.), other secondary sources include assessments of impacts upon labour markets by several international organisations at various scales, including at global, regional and national levels (see ADB 2020a; ILO 2020a; 2020b; UN 2020c, 28ff). In addition, several scholars and NGOs have collected small-scale case studies, including Do Quynh Chi through her two detailed case studies on manufacturing for ILO (ILO 2020i) and for FES (Do Qunyh Chi 2020), as well as CARE (2020), Action Aid (2020), and Save the Children (2020), the latter at an international level.

Keeping these considerable limitations in mind, the following sub-chapters will address a number of core issues in regard to labour markets in Viet Nam during 2020. After outlining general trends and sectoral shifts (5.1), the next sections will briefly introduce statistics on unemployment (5.2), followed by our core analyses of formal and informal labour markets, and gender dimensions (5.3). We then focus on discussing impacts in terms of income losses (5.4), and explore the sub-sector of garment manufacturing, since this is a crucial source of employment for women and low-income households, and can be seen as a paradigmatic sector (5.5). We then exemplify the previous arguments by portraying a few case studies and capturing workers' voices from other sectors (5.6), and briefly outline various coping strategies (5.7). We go on to address social policies and their impacts on different groups, although this aspect has remained a considerable enigma (5.8). In recognition that long-term planning for labour markets can only be undertaken when understanding educational levels, we will provide some analysis in this area and outline key trends (5.9). Overall, there still remain substantial knowledge gaps, which are of critical significance. Thus, to fully analyse gender and social impacts and disparities, we strongly encourage wider empirical studies (see 6.1/6.2).

## 5.1 Overall changes in labour markets throughout 2020

For the East Asia region (see 1.2), impacts of the covid-19 pandemic on local labour markets during 2020 were most significant during the second quarter. Similar to other countries, the Vietnamese Government imposed a national lock down, although this was limited to 22 days during April only (see 3.1). On the other hand, manufacturing of products for global markets has remained lower than in previous years, as demonstrated by both national and international data, as well as from several case studies. In terms of national labour markets, GSO's quarterly analyses show that the number of employed workers had declined by June 2020 by a total of nearly 5.47 million workers, who had "lost their jobs, [were] furloughed staff, or temporary [laid] off" (2020b and 2020e, 4). They note this figure as "a record decline" (ibid., 2), and the UN adds that this was "the largest drop in ten years, with female workers hit even harder" (UN 2020c, 27).

As briefly addressed above, the national definition of the labour force includes three (and overall four) different types of workers/employees, in addition to those unemployed: besides workers and employees engaged in the formal and informal sectors, there are agricultural and household workers, the latter two being subsumed into one category. Guided by ILO's more recent definition (ILO 2013, ICLS 19 Resolution), the term "employment" should be limited to those who "primarily work for pay or profit", excluding those persons/households where "own-use production" is predominant (ibid.). While GSO will take up this distinction in future, the current analyses include all self-employed among the employed.

Labour markets in emerging economies are always characterised by pronounced fluctuations between these three categories, in any given year. As is the case in any form of market, such fluctuations usually increase substantially when labour markets are under enormous stress, such as during the current pandemic. The LFSs confirm this trend (for details see 5.2 below), but at a scale much lower than we had expected. In a wider sense, GSO (GVN/GSO 2020e) assessed that during the first half of 2020, covid-19 "affected the employment of 30.8 million people aged 15 and older". This figure has been quoted by all other publications reviewed. By the end of the third quarter, this figure increased to 31.8 milion (2020g). GSO specified this quite comprehensively, including those "who had lost their jobs, went on furlough, took time off, work alternately, reduced working hours, or suffered income reduction" (ibid.).

Similar numbers were also provided by UNICEF, suggesting that by mid-April, nearly 5 million workers had lost their jobs due to the pandemic (ibid. 2020, 10; UN 2020c). When estimating impacts on different sectors, they quantified 1.2 million (24 per cent) in processing and manufacturing industries, 1.1 million in wholesale and retail industries (22 per cent) and 740,000 in hospitality (14.8 per cent; ibid.). This assessment is much more moderate than what the ILO had published in April. Based on two scenarios, ILO estimated that by the end of the second quarter the crisis could "affect the livelihoods of 4.6 to 10.3 million workers" (2020f, 5). Their higher-impact scenario assessed that in manufacturing alone, 3.8 million workers could lose their jobs, in addition to 2.6 million in wholesale/retail trade, repair of motor vehicles and the motorcycle sector, and 1.4 million workers in accommodation and food service activities. Based on a low-impact scenario, figures were about half these (ibid.).

As outlined above, when assessing changes at the macro-level (4.2) some early studies had a strong focus on the hospitality and service sectors. Yet, later studies increasingly acknowledged the difficulties faced in manufacturing. Overall, the UN assessed that in the service sector, about 72 per cent of workers were affected, which amounted to slightly more than their assessment of the industry and construction subsectors, at 68 per cent (2020c, 28). For the primary sector ("AFF": agriculture, forestry and fisheries) they assessed about 25 per cent of workers being affected (ibid.). As argued above (see 4.1), it is crucial to link these percentages to the actual size of the labour force in these sectors. Thus, the vast number of persons engaged both in agriculture and manufacturing implies that impacts could still be substantial, even if percentages are lower (see Figures 5.1 / 5.2). Significantly, in both of these sectors, a large majority of low-income families make their living, and in manufacturing, women predominate (for details see 5.3 and 5.5, below).

To assess the most prominent changes during the covid-19 pandemic, we have carried out a sub-sectoral analysis of the labour force, based on the GSO's Labour Force Surveys (LFSs) 2019 and 2020. To compare the most important changes, we focus on the eight sub-sectors that account for the largest share of the labour force, from the GSO's classification of 21 sub-sectors. This analysis clearly demonstrates that more or less substantial declines are apparent for five sub-sectors (see Figure 5.1, for data see Table A5, annex). The highests overall declines can be seen in agriculture, yet this is in line with past trends and policy guidelines (see GVN/ MPI 2016 and 2019). Thus, , only a small share should be, and has been, attributed to the pandemic (see Figure 5.2; for data see Table A6, annex).

*Figure 5.1 Changes in labour force in different sectors 2019 and 2020/Q2 (based on LFS data)*

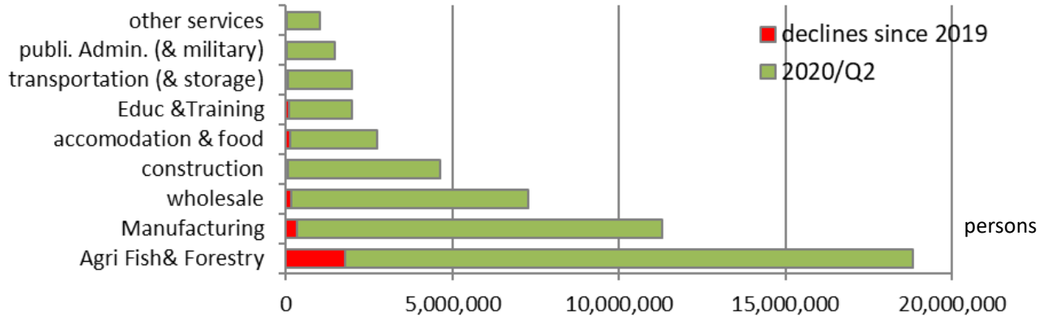
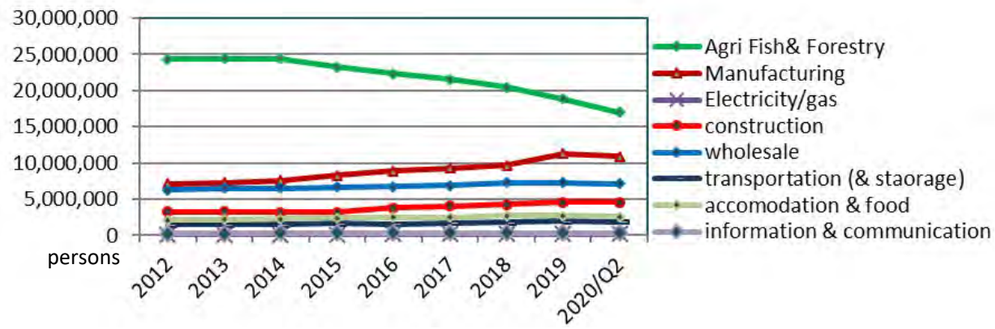



*Figure 5.1 Changes in labour force in different sectors 2019 and 2020/Q2 (based on LFS data)*



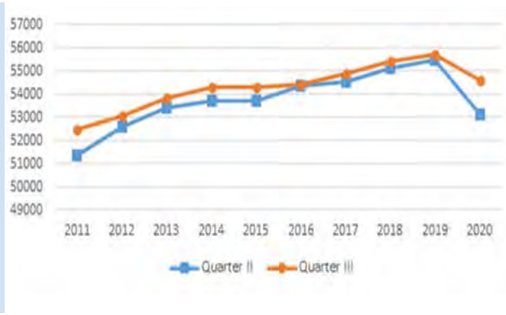

In line with other assessments, the second highest number of job losses took place in manufacturing, which certainly runs counter to growth trends over recent years (see Figure 5.2; for details see 5.3 and 5.5 below). The sub-sectors that have the third and fourth highest numbers of affected workers include wholesale and accommodation/food, followed by education/ training and transportation/storage. These findings are also supported by a World Bank assessment, stating that "regional growth was pulled down by shrinking private consumption and investment, and by contracting manufacturing and services" (2020d, 7).

By the end of the third quarter (end September), the situation had again improved considerably, as portrayed by the GSO's quarterly assessment of covid-19. This stated that the labour market was "showing signs of recovery" (2020f, 2). Generally, the labour force had again increased, or rather recovered, by 1.4 million to 54.6 million, and unemployment had declined (see 5.2). Yet, there were still 1.1 million fewer employed persons than there were during the third quarter of 2019. GSO also estimated that by the end of September, the overall number of "negatively affected persons" had further increased to 31.8 million persons (ibid.). As will be shown in more detail below (see 5.2 - 5.7), among them, 69 per cent had experienced income reductions, reduced working hours/took time off, or work alternately/worked alternate schedules. In addition, about 14 per cent went on furlough or suspended their business activities.

Again, GSO's sectoral analysis shows that the service sector had the highest share of affected workers (68.9 per cent of workers), followed by the Industry and Construction sector (66.4 per cent), whereas the primary sector (AFF) only had 27 per cent of workers affected (ibid. 2020f). GSO also documents that about 1.3 million persons were underemployed (ibid., 5). Although this had declined by 81.400 persons from the second quarter, it was still considerably higher than during previous years (ibid.). Interestingly, the GSO's quarterly assessment documented a similar seasonal pattern of a contracting labour force during the third quarter for the entire decade, although at a much lower level (see Figure 5.3a, below; cited from GVN/ GSO 2020f). Differences between the second and third quarters over the past years were almost nil only in 2016 and at their highest in 2011. During the latter year, the difference was a little more than 1 million persons (ie. less than 2 per cent). While the pattern visualised in the graph (see Figure 5.3, below) is quite impressive, the selective scaling of the y-axes inflates the pattern significantly, ranging between 49 and 57 million (ibid.).

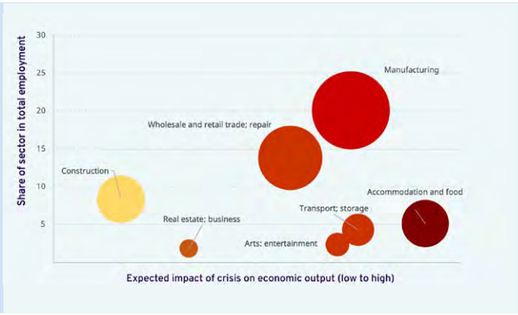
When assessing impacts upon different sectors, ILO in one of their early studies (April 2020), undertook a Risk Mapping exercise (2020f). Among 14 different sectors, the only sector classified as a high-risk sector was accommodation and food service activities (ibid., 2), an assessment that is quite typical for early studies. Among others, four sub-sectors were categorised as medium-risk, including: arts/entertainment, manufacturing, retail, and transport/communication (ibid., 5; see Figure 5.4). On the other hand, ADB and ILO had classified manufacturing as high risk in a different study on impacts on youth employment (2020, 14). When assessing several sub-sectors, manufacturing was divided into automobiles, wood processing, and garments (ibid., 3/.4), without including other core sectors, such as electronics. As argued above, when taking into account the overall sizes of the labour force in these sectors, there is a clear predominance of agriculture and manufacturing, comprising nearly 19 and 11 million persons, respectively (ibid., 5, see Figures 5.1 - 5.4).

*Figure 5.3 Changes in labour force between Q2 and Q3 for 2011 – 2020 * (from GVN/GSO 2020f)*




*.* note that the y-scale is selective*

*Figure 5.4 Expected impact of crisis in different sectors ** (from ILO 2020f,4)*




*** level of risk (dark red for high risk), and the size of circles reflects the labour force*

## 5.2 Disaggregating labour markets and unemployment

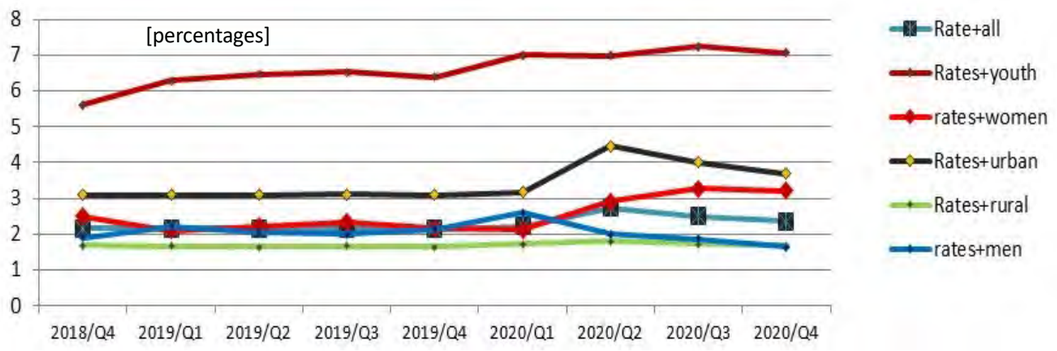
As has been the case for the Asia-Pacific region, overall unemployment numbers and rates significantly increased during the first months of 2020 (see 2.1). As argued above, it is underemployment rather than actual unemployment that has had a more severe impact on labour markets. Thus, the binary positioning of employment versus unemploymen3 fails to provide analytical clarity, and poses a severe methodological constraint. Since GSO also provides information about working hours, this aspect needs to be included in analyses.One sub-sector where changes to the labour force have been extremely pronounced is manufacturing of garments, and thus we will explore it in more detail below (see 5.5). Again, the total numbers calculated from statistical data only partially contribute to capturing the changes that have occurred. This reflecte O'Higgin's argument that unemployment is "only the tip of the iceberg" (2017, 1). As has been shown for the Asia-Pacific region (see 2.1), one of the groups hit hardest were youths (15-24), although in Viet Nam rates compared highly favourably to other countries, at least during 2020.

Data on unemployment during 2020 suggests significant changes but overall extremely low numbers. During previous years (2018 and 2019), total unemployment figures stood at a little over one million, but increased to nearly 1.279 million during the second quarter of 2020. Inspite of this considerable increase of nearly

20 per cent, only about 300,000 "newly unemployed" persons were captured by these statistics, in stark contrast to about 5 million unemployed persons noted in other sources (see UNICEF 2020 and UN 2020c). Over the past years, unemployment rates in Viet Nam have been extremely low, at just a little higher than 2 per cent (from 2.17 - 2.22 per cent). During 2020/Q2, this increased to 2.73 per cent, along with considerable gender and urban/rural disparities. Thus, urban rates had increased from the usual 3.1 - 3.2 per cent to a record 4.46 per cent, while the changes in rural areas remained quite moderate (at a maximum of 1.8 per cent, compared to 1.6 – 1.7 per cent during previous years). These low rates were vastly exceeded by unemployment among youths (at 5.5 – 6.6 per cent), increasing to a maximum of 7.01 to 7.24 per cent during the first and third quarters, and declining below 7 per cent in the second quarter, counter to all other trends (see Figure 5.5, for data see Table A6, annex).

When further disgaggreagting these data, the highest increases in unemployment rates during the second quarter of 2020 can be found in urban areas (plus 40.2 per cent) and among women (plus 36.6 per cent) –a pattern also confirmed by Scott et al. (2021) in their study on Young Lives at Work, published by Oxford University. Interestingly, while rates in urban areas rapidly declined to 4 and 3.7 per cent by the third and fourth quarters, unemployment rates among women remained high and continued to incease during the third quarter, thus indicating a critically slow recovery process. Unemployment data are also important for assessing access to unemployment benefits – a topic that will be addressed when discussing social security schemes (see 5.8). Overall, while shedding some light on labour markets during the year 2020, these figures clearly indicate that unemployment data are a weak proxy for assessing the drastic changes that have characterised labour markets during 2020.

*Figure 5.5 Disparities among unemployment rates during 2018 and 2020 (compiled from LMUs)*




## 5.3 Disaggregating labour markets – gender and informality

One of the core features of the impact of the covid-19 pandemic on labour markets is that informality has decisively increased during the year 2020. As we will explore in more detail, boundaries between formal and informal types of employment have substantially shifted. As pointed out above, the pandemic had a stronger (net) impact upon the formal sector, in terms of the number of persons becoming unemployed. On the other hand, the impact was much more severe and even more critical for workers in the informal sector, given that informal workers are far less secure, as the definition of "informal" implies. As calculated earlier, among those who lost their jobs, about 2.9 million were from the formal sector, compared to about 2.6 million people from the informal sector (see GVN/ILSSA 2020a and 2020b). At the same time, a gender analysis implies that in the formal labour market, male workers were more affected than women, at 17.7 per cent versus 7.3 per cent, respectively. On the other hand, in informal labour markets women have been affected more strongly, as also confirmed by the UN (2020c). Yet, it is highly likely that overall statistics reflect only net changes, and might not capture internal dynamics.

The concept of informal labour has been debated for nearly 50 years after Hart's groundbreaking publication (1973). In a joint publication with the ILO, the Vietnamese government provides the following characterisation: "[it] often fails to meet the costs of acceptable living standards due to insufficient salaries, working conditions and social protection" (GVN/GSO and ILO 2017, i). To make matters more complex, analysts not only make the distinction between formal and informal sectors (and labour markets) but also between a formal and an informal labour force. The latter is a bi-variate (or even multi-variate) combination of those employed in both the formal and informal sectors. For the formal sector, the main criteria is whether or not enterprises are registered. For the latter, the core criteria is whether or not workers have a contract and/or contribute to social security schemes (VSS; for details see O'Higgins 2021, 11). Overall, for (development) economists, such shifts are a most decisive indicator for analysing labour markets, and socio-economic change.

Supported by the UN and ILO to strengthen global policies on decent work (ILO 2017; UN 2015; GVN and UNDP 2015), national governments worldwide have a strong political interest to gradually shift labour markets from informal to formal governance arrangements (for analytical framework see Figure 1.5, section 1.3). Indeed, this shift is usually seen as a core pillar for advancing economic development. In the formal sector, the political sphere defines working conditions, such as working time and wages/ salaries, as well as contributions to social security schemes, including health insurance, unemployment insurance and old-age pensions (see 5.8). Regulations via the political sphere also implies the need to adhere to national (political) guidelines, and in the longer term, to international commitments.

To bring about this change in legislation, the revised Labour Code 2019 (GVN 2019) is a crucial document. It regulates the need for labour contracts (Chapter III/Article 13), defined as "an agreement between the employee and the employer on a paid job, wage, working conditions, and rights and obligations of each party [..]". The Labour Code clearly defines the need for a written form (Article 14/1), although allowing for some exceptions (Articles 14/2). In more detail, Article 21 on "Content of Labour Contract" not only specifies "Working time and rest time" (Article 21/ 1g) but also all forms of social security schemes, namely "Social insurance, health insurance and unemployment insurance" (Article 21/1i; see also Chapter XII/Article 168), as well as "Further training, and improvement of occupational qualifications and skills" (Article 21/1k). It places MOLISA in charge of detailing the points mentioned above (Article 21/5).

In regard to wages, the Labour Code clearly specifies that "the wage amount must not be lower than the minimum wage level" (Chapter VI/Article 90; for details see 5.4). In the long run, once governance is regulated by the political sphere, this allows for two crucial changes: first of all, it allows the Government to gradually include the labour force in national taxation schemes, applicable for both companies/ employers and workers/ employees. And secondly, it will be possible to handle cases of violations, through the judiciary, such as labour courts. On the other hand, while the formal sector is highly regulated by the Labour Code, there is no equivalent legal framework covering work/employment in the informal sector, as this term suggests.

So far, the most comprehensive analysis of the informal sector in Viet Nam was provided by GSO and ILO in 2017, based on data from 2014 - 2016. This demonstrated how labour markets have been gradually changing, although at a rather slow pace (GVN/GSO and ILO 2017, 12). While agricultural/ household work has been consistently declining, the labour force in the informal sector has been increasing, although slower than the rate for formal employment. Overall, the latter increased from less than 12 million to nearly 13.5 million during 2014-2016, implying annual growth rates of about 4 - 7.3 per cent. Yet, during the same period, the labour force employed in the informal sector also increased, although at rates that were substantially lower, at about 2.5 - 4.2 per cent. As a consequence, this was accompanied by a gradual increase of employment in the formal sector from about 41.2 to 43 per cent, while informal employment declined slowly from 58.8 to 57.2 per cent (calculated from ILO 2017; see Figure 5.6; for detailed data see Table A7, annex).

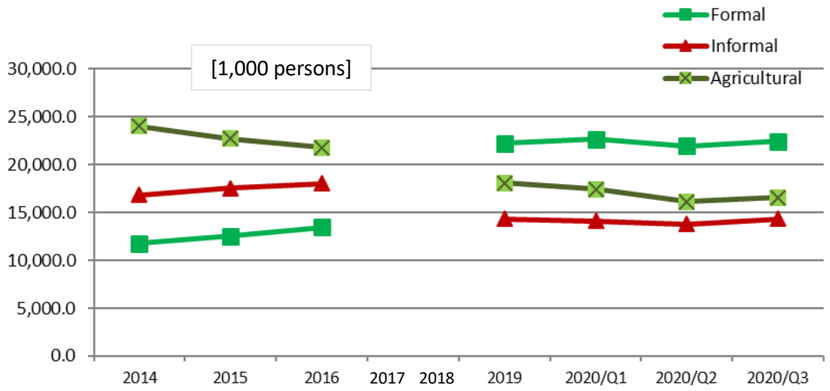
At the same time, it is worth noting that there remains a considerable degree of inconsistency in assessing the informal sector. Significantly higher numbers are provided by O'Higgins (ILO, Geneva), stating that informal employment declined from 79.5 per cent in 2013 to 67.5 per cent in 2019. These differing figures are primarily due to different methodological approaches, as they also include those informally employed in the formal sector, which added more than 10 per cent to the figure. Thus, O'Higgins argues that "the significance of informal work in the formal sector increases" (2021, 17-18).

The ILO has proposed that merely 13.8 million persons in Viet Nam are covered by social protection schemes through Viet Nam Social Security (VSS), while 41.1 million remain uncovered (ILO 2021c, 4/5). Among the latter about two thirds (nearly 70 per cent) are employed in the informal sector, in addition to those informally employed in households (14.7 per cent) or in the formal sector (16/15.3 per cent). These figures suggest an informal labour force within the informal

sector of about 28.5 million, plus about 6.5 million working informally within in the formal sector and 6 million working in the household sector. If correct, this would amount to around 35 million (52.4 per cent plus 11.2 per cent, i.e. a total of 63.6 per cent) in informal employment. This does consider the agriculture sector, which is omitted from O'Higgins' data.

To shed light on the crucial distinction between the formal and informal labour force, we have analysed the 2019 and 2020 LFSs in more detail. In 2019, employment in non-agricultural sectors comprised about 35.5 million persons (54.6 million minus 18.1 million in agriculture). The formal sector had increased considerably to more than 21 million persons (57.4 per cent), compared to 13.8 million in the informal sector (42.6 per cent). However, nearly one third of workers in the formal sector (6.5 million) were classiffed as de facto informal labour force, since they had no work contract and/or could not access social insurance. When subtracting these workers from the formal sector, the share of the formal labour force declines considerably, to 15.1 million (ie. less than 40 per cent), while the labour force enaged either in the informal sector or the informal labour force in the formal sector increases to nearly 60 per cent (adding them to 13.9 million, amounting to 20.4 milion; for detailed figures see Table A7 / A10, annex).

*Figure 5.6 Labour force in agriculture, formal and informal sectors * (2014 - 2020)*




sources: based on on ILO 2017 & GVN/MOLISA & GSO 2020a/c

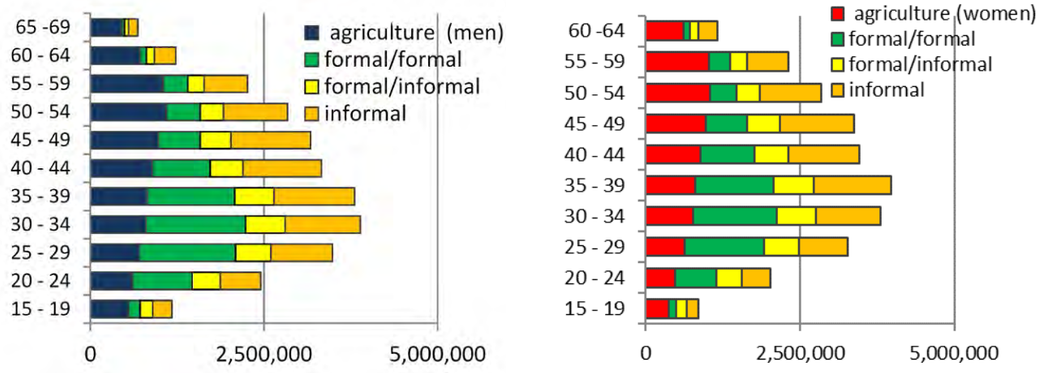
* for methodological constraints see text above

This composition clearly indicates the crucial importance of the informal sector, and also highlights the urgent need to provide clearer definitions. This is of particular importance to a few industries, such as manufacturing (see below, and section 5.5). In addition, it is important to note age and gender patterns, and it is of paramount importance to secure the livelihoods of low-income households in this sector, as illustrated by several case studies undertaken across the country (see GVN/ILSSA 2020a).

When analysing demographic patterns of formal/ informal employment, these are distinctive in terms of both gender and age. First of all, what might come as a surprise, is that the rate of formal employment is slightly higher among women than among men (see Figures 5.7/5.8; for detailed data see Tables A8 / A9, annex). Among those engaged outside the agricultural sector, women in the formal sector account for nearly half (48 per cent) and for a considerable majority among the younger age groups (20 – 39, at 54-69 per cent). On the other hand, the informal sector is of high importance among older age groups, from about 45 years upwards. However, informal employment in enterprises in the formal sector, which account for 12 to 24 per cent, is highest among the youngest group. Given this high prevelance of informal work in the formal sector, it seems safe to assume that "contracts" often take the form of informal arrangements. Again, what might come as a surprise is that informal employment in the formal sector is considerably higher among men, and in combination with employment in the informal sector, accounts for more than 50 per cent across all age groups (50-70 per cent).

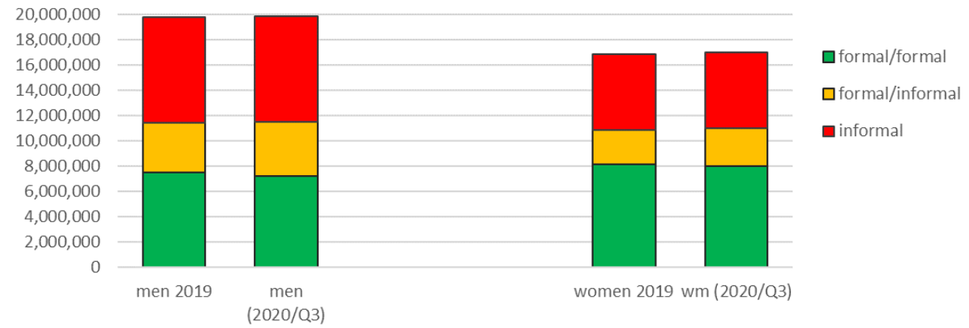


*Figures 5.7 / 5.8 Gender and age composition (women on right, men on left) of formal/informal labour force in 2019 (based on LFSs)*




When analysing changes in regard to informality of the labour force during 2020, the LFS 2020/Q3 clearly documents that by mid 2020 the share of formal employment had decreased slightly, while informal employment within the formal sector had increased considerably, by about 9 per cent. Declines among the male formal labour force were significantly higher than among women, at 4.7 per cent and 1.1 per cent respectively. When analysing demographic features of these shifts, changes were most significant among younger men (from 2.7 – 5.4 per cent). At the same time, declines among informal workers were higher for women in most age groups (1 – 1.8 per cent, compared to 0.4 - 1.3 per cent among men), with the exception of the youngest age group. Shifts towards informal employment within the formal sector also indicated a strong gender pattern, with this type of work increasing by 7.6 per cent among women, and 10.9 per cent among men (see Figure 5.9; for data see Tables A9 – A10).

*Figure 5.9 Changes in formality/informality by mid-2020 (based on LFSs)*



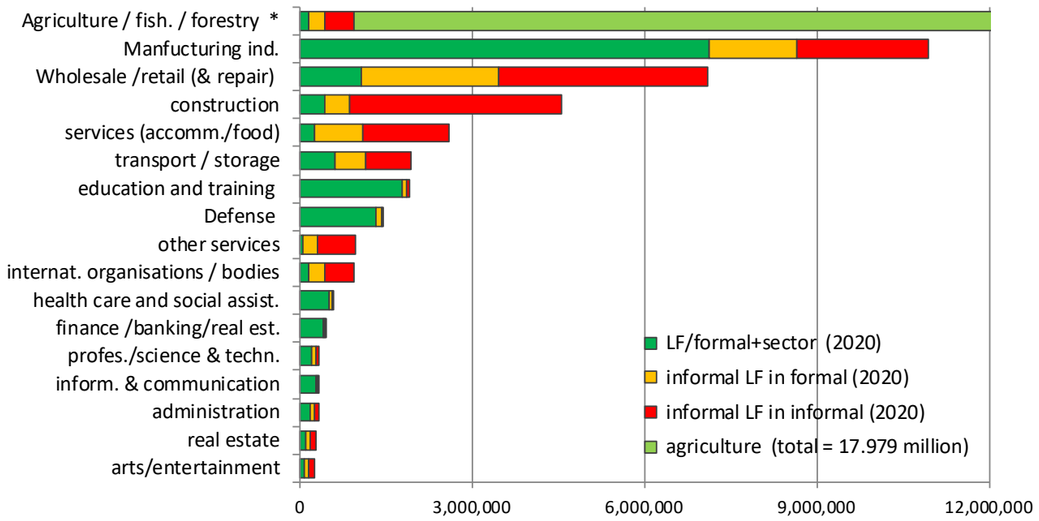

Overall, changes were most significant within the agricultural sub-sector (at 8 and 9 per cent among men/ women, respectively). Yet, as argued above (see 5.1), the latter changes are in line with general trends as well as with policy guidelines. On the other hand, trends of informalisation that occurred during 2020, including within the formal sector, run counter to any of these policies. These findings have been confirmed by ILSSA's two studies on formal and informal labour markets. In the latter we had argued that "Informal female workers lost their jobs, had their work reduced much more than informal male workers because informal female workers were mainly in the most vulnerable sectors, such as garment and apparel, footwear, handicrafts, retail sales, domestic workers [..]" (GVN/ILSSA 2020a, 9; for details see 5.5).

As indicated above, during the third quarter (July – September) of 2020, the labour force witnessed a substantial increase from the second quarter (plus 1.2

million), indicating that figures were only slightly lower than during the previous year (by 149,000 persons). When comparing growth (or rather recovery) rates for the formal and informal sector, these were much higher for the informal sector, at 5.8 per cent versus 0.8 per cent, respectively (ibid.). GSO raises concerns about this high share of informal employment, arguing that "the current labour market recovery is unsustainable as informal workers are said to be those facing many vulnerabilities and disadvantages, and those who find it difficult to access welfare and social insurance regimes" (GVN/GSO 2020f, 4). The latter aspect will be addressed in more detail (see 5.8).

Analysing informality in different economic sub-sectors reveals that it is highly concentrated in a few sectors, as demonstrated for earlier years by ILO (2017). Yet, as argued before, these higher or lower shares (in terms of percentages) must be viewed in relation to overall compositions of the labour force. Previously, numbers of the informally employed were highest in construction, retail and manufacturing, at 4.7 million, 4.3 million and 3.4 million, respectively (for data see Table A10, annex). Based on our more recent and nuanced analysis of the 2020 labour force, among these sub-sectors wholesale/ retail as well as manufacturing comprise of a large share of workers within the formal sector, but engaged under informal arrangements (see Figure 5.10; for data see Table A10, annex). As argued above, it is these blurred boundaries that make analyses difficult, even in years prior to the covid-19 pandemic, let alone during this highly volatile period of the pandemic during 2020, and even more so in 2021. Yet, in terms of analytical clarity, these distinctions are crucial and need to be considered and followed much more rigorously.

*Figures 5.10 Informality in different sectors in 2020 (calculated from LFS 2020)*




When analysing social impacts of informality, regional disparities are also of high importance, since these indicate the regional/provincial dimensions and distribution of low-income households. Similar to all other social parameters, rates of informality in different provinces vary considerably. For 2016, ILO documented the highest levels of informality in An Giang, Bac Lieu, Soc Trang and Nam Dinh (raning from 74 - 78 per cent), and the lowest in Tom Tun, Binh Phuoc and Dien Bien provinces, ranging from 39 - 43 per cent (see Figure 5.11, for detailed data see Table A11, annex). With regard to locational disparities (rural-urban), informal employment was more prevalent in rural than in urban areas, at 62.9 per cent and 49.5 per cent, respectively (GVN/MOLISA and ILO 2017, 25).

When assessing changes during 2020, among all six regions, the two regions with the least developed economies (Northern Midlands & Mountains and North Central/South Central Coast) had the highest rates of informal employment (at 36.2 per cent and 25.8 per cent respectively). In contrast, the corresponding figures in southern regions (Southeast and the Mekong River Delta) were 4.9 per cent and 6.2 pc, respectively. Thus, the impacts of the covid-19 pandemic have been the least significant in regions with higher rates of economic development.

*Figure 5.11 Provicial rates of informal labour force for 2016 (based on ILO 2017, 60-62)*




As noted above, it is important to consider that these are gross figures obtained from official statistics, and we assume that there have always been substantial cross-over between the formal and informal sectors. While during "normal years" these cross-overs are likely to occur in both directions, it is highly likely that one of the severe effects of the pandemic is that these changes in 2020 were primarily one-way, leading to a shift towards informal employment. As outlined above, informalisation can occur in two distinct forms, either within the formal sector or between the two sectors. In the first case, new forms of employment, and possibly even existing jobs, shifted from formal to informal, without the inclusion of contracts or social security. We assume that persons employed in formal labour markets have greater bargaining power, making it easier for them to find new employment opportunities, possibly in the informal sector, thus leading to cross-overs and shifts from one to the other.

In summary, there has been a strong drift towards the informal sector, which increased by about 10 per cent, and is much more significant than increases among the labour force in the informal sector (2.8 per cent). Again, it is crucial to note that these statistical changes are merely net values. A brief calculation may exemplify this: among 100 persons employed in the informal sector 30-40 could have lost their jobs. At the same time, 20 persons from the formal labour force may have managed to buffer their unemployment by finding a job in the informal sector, or informal employment within the formal sector. When looking at gross figures, the statistical evidence of "losses" within the informal sector would merely be represented at 10-20 per cent, whereas in fact, losses would have accumulated to about 30-40 per cent. It is crucial to note that analysing such shifting compositions of the labour force can not be carried out through regular data only (such as GSO). Thus, a more comprehensive social impact analysis requires a more specific survey– this is something we suggest exploring in much greater depth (see sections 6. /6.2).

## 5.4 Volatile incomes and social disparities

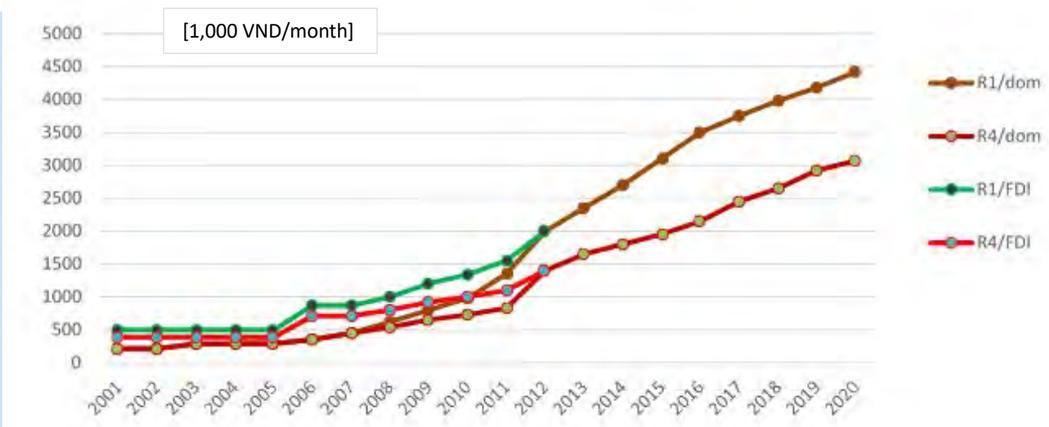
As outlined above, during 2020 (and again in 2021) a high share of workers/employees had either become unemployed or more or less severely underemployed. In addition, a large number of workers shifted from formal to the informal labour markets, or to informal types of employment within the formal sector. In many if not most cases, a crucial result of these changes has been lower and more unpredictable incomes. Obviously, declining incomes are a challenge for all groups, but for low-skilled and low-income households these declines can be a decisive factor pushing family incomes below poverty lines (for more details see 5.7, below). This is of particular high concern among single earners and/or households with many dependents to support.

As discussed above, there are distinctive differences between informal and formal labour markets and types of employment. In terms of governance, the latter is highly regulated, and thus needs to follow national (and to some degree even international) regulations and legislation. One of these core regulations concerns minimum wages, as regulated by the new Labour Code 2019 (Articles 90 and 91). This is defined as "based on the minimum living conditions of employees and their families; their relation with market wage levels; consumer price index and economic growth rate; labour supply - demand relation; employment and unemployment; labour productivity; and payment ability of entreprises" (Article 91/3). To regularly revise the minimum wage, the National Wage Council (Article 92) was established, consisting of "representatives of MOLISA, VGCL, some employers' representative organisations [..] and independent experts" (ibid. 92/2).

Over the past two decades, minimum wages have been raised substantially, and by 2020, minimum wages were almost 20 times higher than back in 2001. Since 2005, wages have increased tremendously, by about 20-30 per cent annually. These increases have been strongly fuelled by companies that fall under FDI regulations. For FDI enterprises, in 2001 (and again in 2006) monthly minimum wages were more than double than at domestic entreprises, at VND 495,000 compared to VND 210,000. Between 2006 and 2012 wages at FDI entreprises sky-rocketed by 400 per cent (ie. at average of nearly 60 per cent/ year). This triggered domestic entreprises to rapidly raise wages, and between 2009 and 2011, these high wages differentials were gradually reduced (see Figure 5.12, below; for data see Table A12, annex).

From 2012 onwards, minimum wages for domestic and FDI enterprises were on par. More recently, wage increases have been considerably lower, ranging at about 8- 18 per cent annually. Regulations for minimum wages distinguish between 4 different regions (R1 – R4) in order to counterbalance higher costs of living in certain metropolitan/urban areas (such as HCMC and Ha Noi). These regional wage differentials usually range between about 20-30 per cent. While in 2012, rates for monthly minimum wages ranged between VND 1.4 and 2 million, during 2020, wages had increased to VND 3.07 million in rural areas (R4) and VND 4.42 million in metropolitan areas (R1; ie. US $ 133 – 192 / 118-170 Euro), as regulated by Decree No. 90/2019/ ND-CP (GVN/CP 2019).

*Figure 5.12 Regulations for minimum wages (2001 – 2021; compiled from various sources; see Table A12, annex)*



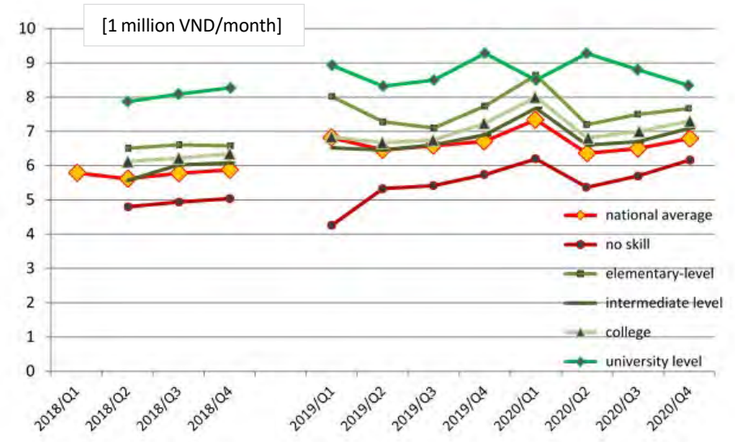

Since income disparities are crucial indicators of developments within labour markets, incomes have been analysed to assess social disparities, comparing several Labour Force Surveys (2018 - 2020), as well as data from VHLSS (2008 - 2018). These social disparity analyses focus on two core parameters, namely five different income quintiles and educational status. In addition, gender and locational (urban-rural) disparities will be briefly outlined . To support our arguments, we will compare these analyses with other sources, as declining incomes for 2020 have been documented in nearly all studies (World Bank 2020h; Do Quynh Chi 2020 for FESl Do Quynh Chi for ILO 2020h; CARE 2020; UNICEF 2020; UN 2020c).

In order to better understand changes to wages during 2020, shifts over the past two years will be briefly summarised. In line with previous years, the LFSs document that between 2018 and 2020, wages have increased regularly, by about 1.5 - 2 per cent per quarter, or 6-12 per cent annually (see GVN/MOLISA and GSO 2019 and 2020a-d). Usually, the only exceptions are between the first and the second quarters, due to annual bonuses during the first quarter (for têt/lunar New Year). While incomes stood at a national average of less than VND 6 million during 2018, by the first quarter of 2019 they had increased to VND 6.82 million (see Figure 5.13; for detailed figures see Tables A 13a / A13b, annex). On the other hand, the LFSs confirm that during 2020, average incomes declined from VND 7.34 to 6.42 million between the first and the second quarter, indicating a decrease of 13.3 per cent (GVN/ MOLISA and GSO 2020b-d). Wages/ salaries gradually increased again and by the fourth quarter they reached close to 2019/Q4 values (ibid.).

Unsurprisingly, distinct social and gender disparities are evident, although the latter are moderate when compared to other countries (see ILO 2021c and ADB 2021). Thus, incomes for men exceed those for women, with the disparity ranging between 11 and 14 per cent (calculated from GVN/MOLISA and GSO 2019 and 2020b-d). Over the past years, increases in wages for women have been slightly higher, and accordingly, gender gaps have been gradually declining, although quite slowly. Alarmingly, during 2020/ Q2 women's wages declined more ( 14 per cent) than those of men ( -13 per cent). Gender disparities are most significant among agricultural workers, but also quite substantial in manufacturing – a sector that we will address in more detail (see section 5.5). Promisingly, there was one sector where women had higher incomes than men, namely professionals/sciences (see Figure 5.14, below).

In terms of social disparities based on skills/education, it is of little surprise that the highest income level can be found among university graduates. Their average monthly incomes reached 8.09 million VND in 2018/Q2. During 2019, incomes increased from about VND 8.27 million (2018/Q3) to about VND 8.32 – 8.93 million. By the last quarter of 2019, average incomes among this group surpassed VND 9 million, although these declined again, even during the first quarter of 2020. Contrary to most general trends, these salaries remained stable during the second quarter of 2020, while incomes for all other skill levels experienced substantial declines. Again, counter to all trends, these high-skill incomes declined during the third quarter and fourth quarter of 2020 (see Figure 5.13; for data see Table A13b, annex) – a phenomenon which is difficult to interpret. By early 2021, these high-end salaries increased substantially, exceeding previous levels considerably, at VND 9.72 million (see GVN/MOLISA and GSO 2021a).

*Figure 5.13 Monthy wages/salaries for different skill levels (2018 – 2020, based on LMUs 2019/2020) **

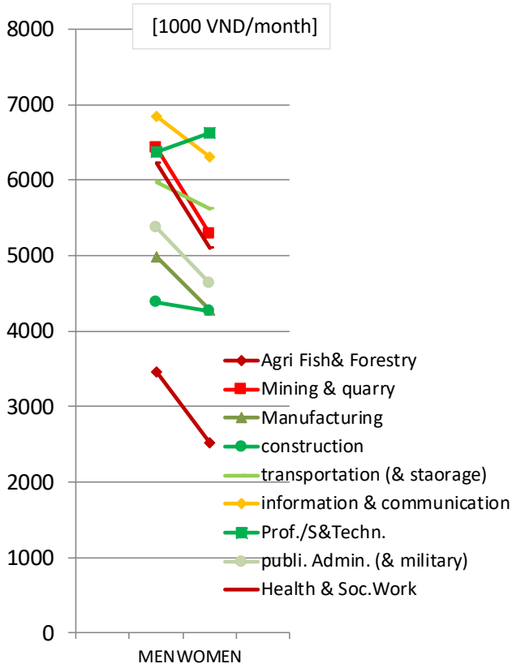



**compiled from GVN/MOLISA and GSO 2019a, 2020a and 2020c (for 2018/Q1 education data was not included)*

At the bottom end of the income spectrum, those classified in the category of "no skills" experienced moderate increases in incomes during 2019, from about VND 5 to 5.87 million, which increased up to VND 7.68 million during the first quarter of 2020.

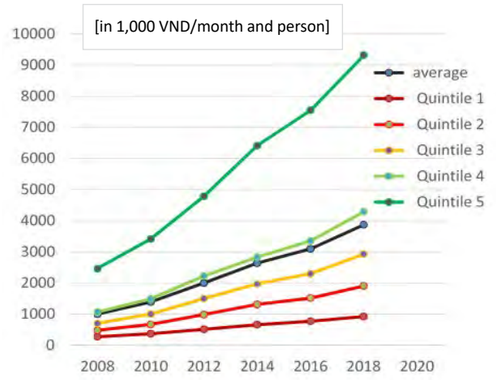
Yet, during the second quarter, incomes for this group drastically declined to a critical level of VND 5.37 million. While this decline (nearly 14 per cent) was exceeded by declines among other skill groups (ranging from 14.1 – 16 per cent), the low wage level among this group is of critical concern. By the third quarter of 2020, average wages had again slightly increased (by 2.2 per cent). Generally, these increases were highest among the lowest skill level (at 6.1 per cent), but also among workers with a medium level education. By 2020/Q4, monthly wages among those with the lowest skill level had almost reached pre-pandemic values (at VND 6.16 million, compared to VND 6.20 million), but remained stagnant during 2021/Q1. As a consequence, overall social disparities have again increased, from 35 per cent to nearly 60 per cent (for detailed figures, see Table A13b, annex). In addition to social disparities, the LFS documents that increases in incomes also evidenced strong regional/ locational disparities, with income increases much higher in rural areas (3.9 per cent), compared to merely 0.3 per cent in urban areas. This is of significant concern, as rural-urban migrants are a core group of the urban labour force. Stagnant wages among this group are particularly detrimental, since the costs of living in urban areas usually remain high.

*Figure 5.14 Gender disparities of wages/salaries for different sectors (2019/Q4)*



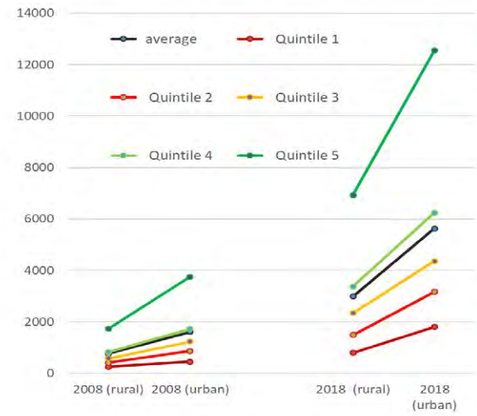

As elaborated above, much greater income disparities are evident for specific sectors and gender (see Figure 5.14), as well as different income groups. Among the latter, the highest quintile have experienced considerable increases to their monthly incomes, which rose up to about 9.5. million per person in 2018. While this had a positive effect on increasing average national incomes, the two lower income quintiles lagged considerably behind, remaining at income levels of VND 1 and 2 million per month, respectively (see Figure 5.15; for data see Table A 13a, annex). This has also been captured by LMUs, documenting that during the second quarter of 2020, incomes among the "bottom 40 per cent" had declined to about 3 million (GVN/ MOLISA and GSO 2020d, 4), and to VND 2.16–2.3 million during the first quarter (see GVN/ MOLISA; GSO 2020c). Similarly, urban-rural disparities have also increased significantly, particularly in recent years (see Figure 5.16; for data see Table A13a, annex).

*Figures 5.15 Incomes disparities for different social groups (2008 – 2018)*




*Based on data from GVN/GSO (2020, 392)*

*Figures 5.16 Incomes disparities for different locations (2008 – 2018)*




As mentioned above, crucial aspects related to declining incomes have been documented by many studies. Specifically, two panel studies conducted by the World Bank capture that reduced incomes, along with fewer weekly working hours (ie. underemployment), were far more common than actual unemployment. The authors argue that this was the "most commonly cited source of income reduction [..] twice as common as job loss" (World Bank 2020h, 1). They document that an average of 52–60 per cent of all households were affected by lower incomes, 25 per cent of which were severely affected, experiencing losses ranging from 50 – 99 per cent (ibid.). Although this vast range implies a high level of imprecision, these data quite clearly document the strong impacts, particularly upon low-income groups. A regional disaggregation indicates that the Northern and Coastal Central Region and the Central Highlands were hit hardest, as well as Da Nang. The latter was possibly impacted due to a major outbreak that had just taken place prior to the study (as noted above in section 3.2). On the other hand, locational disparities (rural/ urban) were less significant than expected, with the exception of those experiencing total declines in incomes, at about 4 per cent in rural areas and 2 per cent in urban areas (ibid., 2).

What was highlighted by the World Bank as a particular concern is that the group of "highly impacted" households was alarmingly high (about 8 per cent) among the "bottom 40" households (ibid. 2020h). Similar to other studies, the World Bank study also notes that coping strategies had a strong influence on food consumption, an issue that we will address in more detail (see section 5.7, below). The World Bank argues that "[t]his suggests that certain groups are experiencing longer-term hardships and may require targeted assistance" (ibid.). The panel study also documents significant changes between the two rounds of data collection: while the first round documented that 70 per cent of all households had been affected by declining incomes during the previous month, during the second round, this figure declined to less than one-third of households, which was interpreted as a "sign of recovery" (ibid., 1). What is also of high policy interest is that a large number of these workers had changed their jobs, accounting for around 20 per cent in urban areas per (among 70 per cent), equal to nearly every third worker (ibid., 6).

Dramatically declining incomes during the covid-19 pandemic of 2020 have also been documeted by UNICEF. Their study from three provinces indicated that "57 per cent were jobless and 25 per cent had less paid work" (ibid., quoted from UN 2020c, 14). A similar number of workers were affected during the strict lock down, and "44 per cent reported having no income and 40 per cent less income" (ibid.). Not surprisingly, the study indicates that informal workers were among the most vulnerable groups, "due to the lack of basic social protection schemes regarding income security, sick leave and health insurance compared to formal jobs" (quoted from ibid., 39). Overall, most households had "income reductions of 50-70 per cent [..], or no incomes at all" (ibid.).

Crucial details about income declines have also been documented by Do Quynh Chi's two studies, one for ILO and the other for FES. Based on samples of 292 and 166 households, respectively, the studies concentrated on several sub-sectors within manufacturing, including

electronics, garments and footwear. The study for ILO clearly indicates that very few households had experienced no impacts, at merely 12 per cent. This share was particularly low among critical groups ("EMPs": single earners, migrants and parents), who needed to considerably reduce their living expenses (for details see 5.7, below). Overall, income losses of 20-50 per cent were most prevalent in this sector, though in tourism, losses were higher (for details see Figure 5.20, section 5.7). Among the sectors studied, electronics had by far the highest proportion of stable incomes (18 per cent). Do Quynh Chi´s ILO study also indicated noteworthy gender disparities, highlighting that for 83 per cent of surveyed women and their families, impacts have been "extensive" (ibid., 1). Even more critically, 32.3 per cent of these women were either the main or single earners in their families (ibid.). The study also describes migrant workers as facing "a double challenge" (ibid.), having either lost their jobs or experiencing income losses in addition to being away from their families.

The latter point confirms primary data from ILSSA´s previous study on informal labour markets (GVN/ ILSSA 2020a), which exemplifies another critical aspect regarding migrant workers. In contrast to local residents, their subsistence costs (particularly rents) are much higher and do not fluctuate. Although it was possible to postpone payments of rents due to government regulations, these could neither be reduced nor would these postponed payments be cancelled (see GVN/ILSSA 2020a, 62). Accordingly, it was much harder to buffer the negative impacts of income declines. These aspects of social impacts constitute a significant knowledge gap and would require much more detailed studies to ensure a better understanding (see section 6).

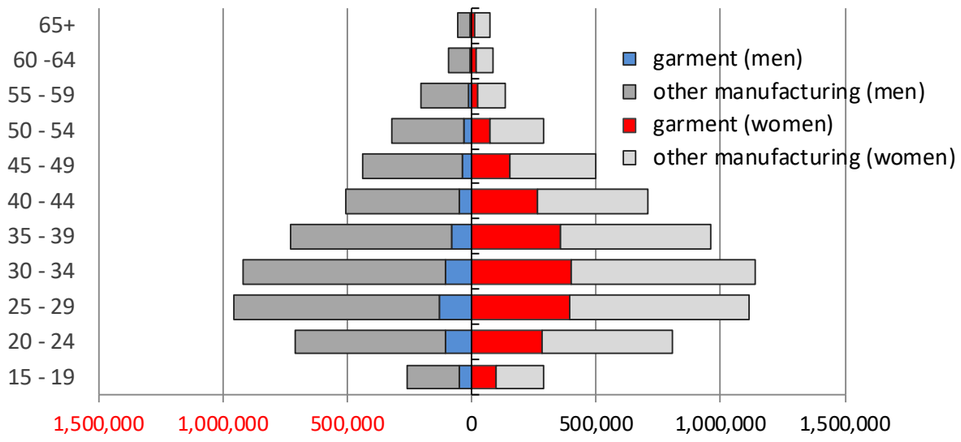
## 5.5 Disaggregating labour markets - manufacturing and garments sectors

As noted, the impacts of the covid-19 pandemic on the labour force during 2020 were quite significant in the manufacturing sector. One sub-sector particularly affected was garments, with a labour force of approximately 2.5 million workers during previous years (Do Quynh Chi 2017, 8). Most importantly, workers in this sector are mainly those with lower education levels, and thus lower qualifications and wages (see 5.4 above), most of whom are women and belong to vulnerable groups. As outlined above (4.3), during the early stage of the pandemic in 2020, substantial bottlenecks in supply chains made production difficult. Later on, global consumer markets declined considerably, bringing about massive declines in orders, as well as cancellations. Since the lockdown in 2021 has lasted for a much longer period, the situation is like to be even more difficult and complex.

To shed light on this critical group of workers, we have analysed several LFSs in more detail, concentrating on gender and age patterns (2018 - 2020/ Q/3). We will also discuss case studies on garment workers from ILSSA's two studies on the informal and formal labour force. In addition, we will briefly refer to the two studies by Do Quynh Chi, published in August for the ILO (2020h) and in late December 2020 for the FES, as well as studies by CARE (2020) and ActionAid (2020).

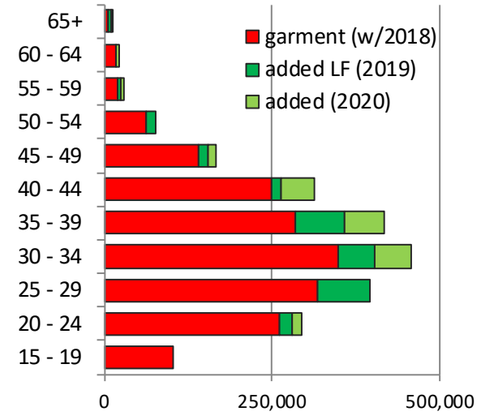
As is obvious from the LFSs, the labour force in garment manufacturing follows similar demographic trends as the informal sector, encompassing both formal and informal forms of employment. Most notably, women

*Figure 5.17 Gender and age composition of workers in manufacturing /garments in 2019 (based on LFS)*




account for about 80-90 per cent of the labour force in this sector among most age groups, as is the case in many other countries (see Graner 2012 for Bangladesh). Of crucial importance for family incomes is that the vast majority of workers are aged 20–40 (see Figure 5.17; for detailed data see Table A14, annex), many of whom are presumably young mothers (and some fathers). What is important to note is that garment manufacturing experienced a significant expansion during 2018 and 2019, when the female labour force increased by 14.5 per cent (calculated from LFSs 2018-2020). Increases were particularly high among 25 – 35 year-olds, rising between 15 and 25 per cent ( see Figure 5.18; for detailed data see Table A14/15, annex). This expansion can most likely be attributed to new recruitments.

*Figure 5.18 Expanding the female labour force in garments 2018 – 2020 (based on LFSs 2018 - 2020)*




Overall, the year 2020 contrasted starkly with the general growth rates prevalent in this sector during the previous years. Yet, surprisingly, while we had expected that the labour force would have declined considerably during the second quarter of 2020, it instead increased, although only slightly. Yet, many of the workers had taken up their work only recently, and were thus much more likely to lose their employment first – an issue we will address in more detail below (see 5.7).

As elaborated above, in many economic sectors, underemployment was much more pronounced than actual unemployment (see 5.2). Thus, while there were hardly any declines in the labour force during the second quarter of 2020, there were massive impacts on working hours and incomes. While 48 hours a week is the standard workload according to the national Labour Code, only around 60 per cent of female workers in the garment sector worked this amount of hours during the second quarter of 2020 (as calculated from the LFS; GVN/GSO 2020b). Among the 40 per cent of the women who worked for fewer hours, a large proportion continued to work for about 35-45 hours, but many women only worked between 25 - 35 hours, and some even for less than 25 hours (see Figure 5.19; for data see Table A16, annex). This pattern is particularly significant when considering that usually overtime in this sector is crucial to increasing wages. According to Do Quynh Chi, in 2016, overtime accounted for about 16 per cent of wages for workers in this sector, and increased incomes from about VND 4.341 million to VND 5.358 million per month (2017, 28).

As outlined above (5.4), regular wages in manufacturing are comparably low, and there are substantial gender disparities. In 2019, average incomes of men were nearly VND 5 million, while average wages of women were only about VND 4.25 million (see Figure 5.14, above). On the other hand, a surprisingly large number of workers in this sector are employed in the formal sector, and are therefore covered by social insurance schemes (see 5.8, below). Naturally, decling incomes are severely detrimental to families, as captured in some of the case studies by ILSSA, documenting the formal (GVN/ ILSSA 2020b) and informal sectors (GVN/ ILSSA 2020a; see also Do Quynh Chi 2020).

Analysing declining incomes, Do Quynh Chi (2020) classified 7 levels, with unchanged and no incomes as two extremes, and other changes linked to either above or below minimum wages, and grouped into five categories: declines of less than 20 per cent, 20-50 per cent and above 50 per cent. Among those employed in garments and footwear, nearly all have been affected, with the exception of a small minority (less than 4 per cent). Income declines were identified as substantial, at either 20–50 per cent or even above 50 per cent (see Figure 5.20; for detailed data see Table A17, annex).

*Figure 5.19 Under-employment among women garment workers in 2020/Q2 (based on LFS 2020/Q2)*

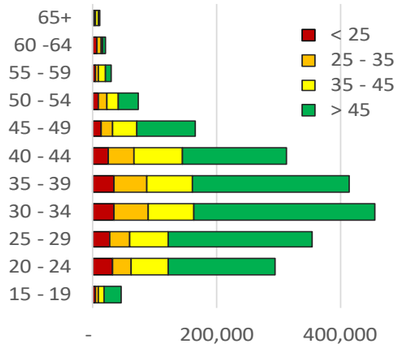
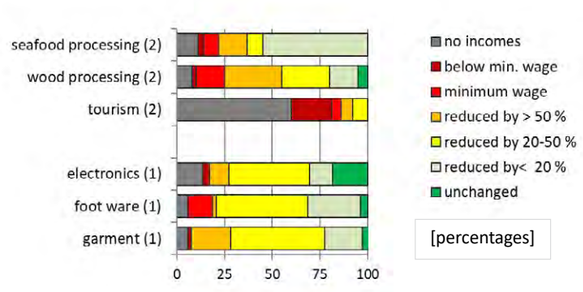



*Figure 5.20 Declining wages during 2020, for sub-sectors of manufacturing (and tourism)*




*sources: data based on Do Quynh Chi for (1) ILO (2) for FES*

Even stronger impacts have been documented by Action Aid (2020) and CARE (2020). The latter argued that the sector was hit severely, "with 100% of garment manufacturing enterprises affected" (CARE 2020, 1). Their study indicates that salaries declined by 20–50 per cent, noting one worker who stated that her salary had declined from VND 5 million to "only 2.5 million VND […and that], by early April, it might reach 1 million VND" (ibid.). The CARE study describes cases of workers who became unemployed in March but were able to find employment elsewhere. However, workers who change jobs are more likely to lose their jobs first, as new workers – an issue which was identified by the World Bank panel study (see below; see also Tram Sy Than et al. 2020). In light of the fact that the impacts of the pandemic in 2021 are longer lasting, these issue are even more alarming.

Less severe income declines have been encountered among garment workers in the formal sector, as a case study shows.

While workers/employees form the largest groups in labour markets (see 2.5/5.1, above), substantial difficulties also exist for small-scale entrepreneurs, in both the formal and informal sectors. For this group, laying off workers constituted a core strategy to minimise or at least reduce monthly operational costs. At the same time, other costs have often remained stable, particularly rents and repayments for loans. While the latter could be postponed until the end of the year due to government regulations (see 3.1 above), payments nevertheless needed to be made, at some stage. Again, such payments certainly deserve to be analysed in more detail.

> I am a garment worker, my work is not affected as badly as other sectors. However, my company is also influenced by travel companies, hotels, and restaurants. Because my company often makes uniforms for the employees of those companies. At present, when those companies face difficulties, my company also loses some of their orders. The number of orders will decrease, and the salary will be reduced by 20%
>
> female garment worker from Quang Ninh province
> (quoted from GVN/ILSSA 2020b, 32)

> I am owner of a factory producing garment accessories. Before the outbreak of the epidemic, I hired 10 workers. During the epidemic, I had to cut back on them due to social distancing, little work, and large inventory. Until now, I cannot call them back.
>
> owner of garment supply chain in Hanoi province
> (quoted from GVN/ILSSA 2020a, 30)



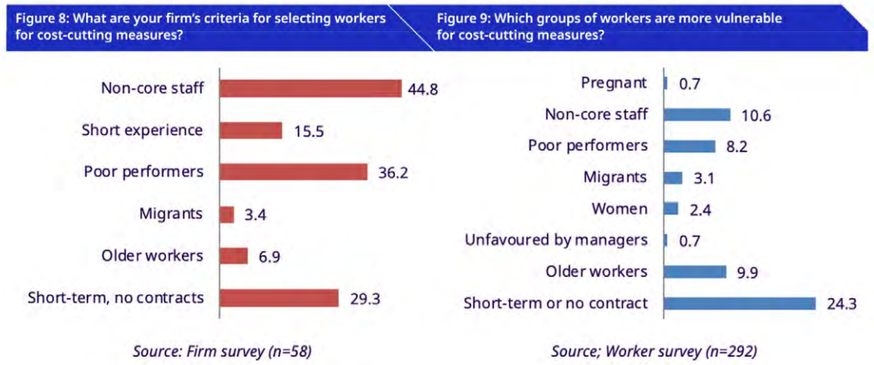
## 5.6 Case studies on workers and workers' voices

In order to explore crucial issues within other sectors, we will portray a few cases studies and quotes from workers, included in ILSSA's two study about informal and formal labour markets (GVN/ILSSA 2020a/ 2020b). As mentioned above, there are several key challenges facing the labour force in the aftermath of the covid-19 pandemic. In addition to the temporary or even permanent loss of employment, there are more or less pronounced forms of underemployment, resulting from reduced working hours and thus reduced wages. As documented in many studies, in most sectors, this phenomenon is by far more prominent than actual unemployment, as is the case for garment workers (see 5.5). Documenting such changes was a crucial component of several studies, including ILSSA's studies (GVN/ILSSA 2020a/2020b). In addition, valuable insights into decision making patterns concerning layoffs of workers were provided by Do Quynh Chi (2020; ILO 2020i).

Do Quynh Chi's two studies for the ILO and the FES include interviews with workers commenting on their unemployment, and one of these strongly supports our argument about attribution gaps. Specifically, a worker from Bac Ninh mentioned that seasonal patterns of lower orders were not unique to 2020 and that their company often had lower orders in the spring, also noting "laid off workers during this time last year. This year, they used Covid-19 as an excuse" (quoted from ILO 2020i, 23). For garment workers, a case study is included from a Taiwanese company operating in Dong Nai province. This company required all of their 600 workers to submit "voluntary resignation letters" (ibid., 24). Rather than doing so, workers were able to re-negotiate their lay offs through the trade union. They negotiated with the company to pay "one month's salary and furlough workers instead of laying them off" (ibid.).

Laying off workers, whether temporarily or permanently, is a sensitive issue, usually based on a series of negotiations and re-negotiations, involving various parties. A vivid portrayal of the consideration of lay offs from two different perspectives has been included in Do Quynh Chi's study for ILO. Her comparative survey (58 entrepreneurs and 292 workers) reveals some pronounced differences: while short-term and non-core workers are most likely to lose their work, poor performers also seem to be highly vulnerable to losing their work. Interestingly, the survey confirms this criteria among employers (36.2 per cent), although significantly less so among the labour force (8.2 per cent only). She argues that "employers appear to take the opportunity to filter their labor force of the perceived poor-performing workers" (see Figure 5.21; ibid., 22). It is difficult to interpret why labourers perceive this issue as less critical. Since the totals (136.1 per cent for companies, but only 59.9 among workers) suggest multiple answers, a ranking of those could have possibly been quite indicative.

*Figure 5.21 Different perspectives about reasons for lay-offs (from Do Quynh Chi, ILO 2020i, 22)*




As argued above, most studies concentrate on either manufacturing or the service sector, whereas workers in the primary sector, including agriculture, fisheries and forestry (AFF), also faced significant difficulties during 2020. ILSSA's survey on informal labour markets has vividly captured the difficulties faced in this sector, including workers' voices from the agriculture and fisher sector, respectively (see GVN/ ILSSA 2020a). In both sub-sectors, the timely sales of products are important, and the quality and prices of products fluctuate considerably, even during regular years. In addition, in the agriculture/horticulture sectors, annual cycles between planting and harvesting are quite long, implying that adjustments and changes might be more difficult than in other sectors.

> My family has four labourers who do farming on an area of three “mẫu” (ie. about 10,000 sqm). On half of the land, we grow paddy; and on the other half, we plant apple and sugarcane. Apples were harvested and sold out during the Têt holiday. The apple price this year was not as high as that last year because of more apple growers.
>
> The sugarcane was transported to Hanoi to serve sugarcane juice shops. During the social distancing, no one came here to buy the products. And even now in June, nothing changed [..]. If we cannot sell the sugarcane by August, we have to hire workers to cut down dry sugarcane so that we can replant it next year
>
> male farmer (64) from Hoa Binh province (quoted from GVN/ILSSA 2020a, 29)

> The hamlet is close to the sea. We have more than 20 households with fishing ships. In the epidemic, we still could go fishing in the sea but we did not know where to sell. Large-sized mantis shrimp was priced at VND 100,000/kg but could not be sold. The bigger the shrimps and fish are, the harder for us to sell them due to few restaurants which opened. Seafood filled the freezers, which haunted us. Freezers have consumed a lot of electricity but the prices now are half of that of fresh seafood.
>
> fisher man (52) from Quang Ninh province (quoted from ibid.)

While these quotes clearly highlight the difficulties faced across different sectors, we would also like to add one voice that indicates a much more positive impact. As has been shown in several studies, for sales persons, as well as for those engaged in the transport sector substantial shifts have taken place. For sales, e-shopping has seen a tremendous boom. This has had a knock on effect for many transport workers engaged in delivering online goods, particularly in urban areas where incomes among service employees ensured purchasing capacities.

> It has been nearly four years since I ran an online business of frozen products and others. I don’t have to pay venue rental and cover advertising costs. I sell my products on Facebook, Zalo, and run some stalls on e-commerce websites. Because of the epidemic, more people switch to buy products online. Word-of-mouth marketing helps me win more customers, even those from other provinces. I have to rent another room to stock my products and one worker to support me
>
> online sales women (30) from Cau Giay district, Hanoi (quoted from ibid., 34)

This is a vivid example of what is often termed as “the new normal”. At the same time, the labour force in the service sector, and particularly those living in peri-urban and urban areas, may represent a considerable demographic bias. Thus, it is safe to assume that these young, urban, well educated entrepreneurs are not representative of the social, educational and generational composition prevalent in many or even most other parts of the country. This group is much more qualified and thus much more likely to find innovative solutions to maintain their incomes either from self-employment or a new option in the (urban) service sector economy.

As we have demonstrated in these case studies, much of the Vietnamese population, including younger persons from rural areas, and from less-prosperous urban areas, are highly likely to encounter enormous difficulties. This is particularly the case among those employed and classified as “un-skilled” workers, and for workers in most sub-sectors of manufacturing. Nonetheless, the latter still represent a large proportion of the overall labour force, and are likely to continue to do so for the ongoing decade, and beyond. Coping mechanisms (see 5.7) as well as support schemes (see 5.8) for these workers will be a core challenge for both the business community and for agencies implementing public support schemes. In addition, technical and vocational training schemes need to play an instrumental role (see 5.9).



## 5.7 Coping mechanisms and poverty rates

Compared to studies about macro-level impacts of covid-19 and labour markets, studies about gender and social impacts are fewer in number. It is important to note that a considerable effect of these contracting and declining labour markets is that poverty rates have again risen, as pointed out by the World Bank (2020h). Within the Asia-Pacific region, the pandemic is “expected to reverse the sustained trend of poverty reduction” (ibid., 11/12), after declining for the past 20 years. For Viet Nam, studies shedding light on these aspects have been compiled by several UN organisations (UNDP and UN Women 2020, and UNICEF 2020) and by the World Bank, in their two panel studies from early/late summer. In addition, the two studies authored by ILSSA (2020a for GIZ and 2020b for HSF) and by Do Quynh Chi (ibid. 2020 and ILO 2020i) include information on this crucial topic. Again, since during 2021 lock downs have continued for much longer, impacts will be much more severe.

Focusing on gender, UNDP and UN Women commissioned a study on “COVID-19 Impact on Vulnerable Households and Enterprises in Viet Nam: A Gender-sensitive Assessment” in the summer of 2020. This RIM study (rapid impact monitoring) was based on a telephone survey of 930 vulnerable households and 935 businesses in 58 provinces across Viet Nam (see UN 2020c, 30ff). The study alarmingly documents that poverty at the US $ 3.20 per day international poverty line dramatically increased from 4.6 per cent (2019) to 26.7 per centin April 2020. Although it again declined to 15.8 per cent by May (ibid., 6 / 12ff), two aspects are of significant concern. First of all, the pre-pandemic poverty rate among ethnic minority households (at 22.1 per cent) dramatically increased to 76.3 per cent in April 2020. Secondly, this rate had hardly declined to 70.3 per cent by May 2020, which is much slower than for any other group. Above all, while disbursements from government schemes appear to have reached traditional beneficiaries of the social assistance system quickly ,“non-traditional beneficiaries or the ‘missing middle’ have faced obstacles in accessing the package” (ibid.) , an aspect that we will address in more detail (5.8).

It is important to gain a better understanding of coping mechanisms. These take the form of reducing spending on various expenses, with food consumption being the most critical among these. Many households also seek additional funds for expences that cannot be reduced, usually in form of either accessing savings and/or acquiring new loans. While official sources might be accessible for high-income households, less affluent households usually rely on either family networks, or social networks. Accordingly, the UNICEF study documents that 30.4 per cent of interviewees “prematurely withdrew money from savings accounts to cover living costs (electricity, water bills, house rental fees) as well as groceries” (quoted from UN 2020c, 39). A large majority (about 70 per cent) started using their savings (see Figure 5.22, below), and 51.4 per cent reported borrowing money from relatives and/or from banks to cover living costs during the social distancing period (ibid.).

The UNICEF study also documents a pronounced gender pattern, and this clearly confirms that women were hit harder. Whereas many male-headed households reduced their expenses by 10-30 per cent, nearly half of all female-headed households needed to reduce their expenses by more than 30 per cent (see Figure 5.22). In some cases, reducing costs also affected educational expenses, as illustrated by a case study of a young mother from Thanh Hoa. During an interview for UNICEF’s RIM study she stated that “My income during COVID was reduced by about 70 per cent. My debt has increased and impacted on the tuition fee for my child in mid-June” (quoted from UN 2020c, 28). As argued above, we would add that in addition to women, migrants are likely to be a highly vulnerable group, for whom borrowing could have been much more critical. For most migrants, social networks are likely to be weaker, due to a shorter time period spent in their place of residence. In such cases, social networks might primarily include other migrant workers who are highly likely to face similar challenges such as unemployment, under-employment and/or substantially reduced wages. Knowledge of social networks in this context is limited and would require much more detailed studies (see 6).

Similar coping mechanisms have been documented by Do Quynh Chi´s studies, which indicated that both food and other expenses were cut drastically, particularly among so-called EMP households. While the majority of households could maintain at least basic levels of food, more than 40 per cent had to reduce their expenditures to minimal and below minimum costs. Overall, 64 per cent of these households needed to reduce spending on “other expenses” to either a minimal level, or below. Among three types of expenses, housing was the least, possibly due to the lack of options for negotiating housing costs. An even larger share (86 per cent) stated that if the pandemic continued for two more months they “expect their livelihoods deteriorate”, and nearly 20 per cent were afraid that “their living standards falling below the minimum level” (ibid. 2020, 2).

Negative impacts on diets have also been captured by the World Bank's panel studies, which highlight that most households reduced the variety and quantity of their diets (2020h). Unsurprisingly, this was most prevalant among the "bottom 40" income group, although it was also quite pronounced among many other households. Specifically, reducing the variety of food was prevalent among more than 60 per cent of households in spring, although by summer this figure was reduced to 55 per cent among low income households. Among other groups, the rate was 48 per cent, and later reduced to 40 per cent (ibid., 9). Skipping meals was quite a drastic measure among low-income households, with about 18 per cent reporting this measure during the spring, which declined to 12 per cent in the summer. Overall, "eating less than thought they should" (ibid.) was a prevalent coping mechanism for nearly half of the bottom 40 households.

*Figure 5.22 Coping mechanisms during covid-19 (based on UN RIM 2020; UN 2020c, 38)*

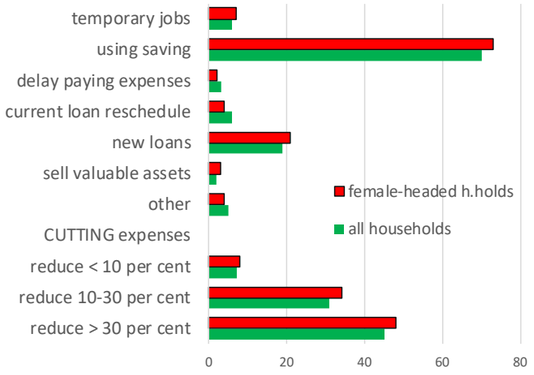
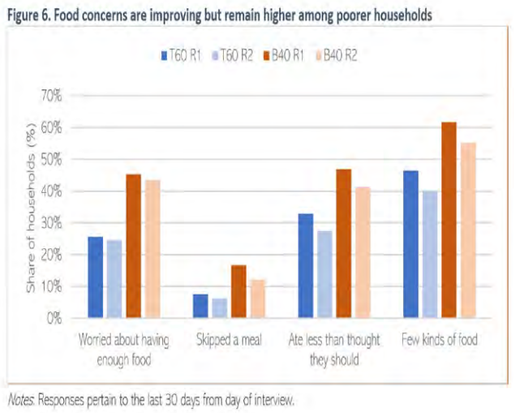



*Figure 5.23 Coping mechanisms among poor/non-poor households (from World Bank 2020h, 9)*




As briefly noted above, when incomes decline, many households are at risk of falling into poverty, with incomes at rates below the poverty line. Impressively, in recent decades, poverty rates declined considerably across the country. At the national level, the poverty rate was nearly 60 per cent during the early 1990s, which rapidly declined to less 40 per cent by 1998 and to less than 20 per cent by 2004 (see Figure 5.24, below; for detailed figures see Table A17, annex). On the other hand, regional disparities were substantial, and have remained until today. The Southeastern region of the country has retained a top position in terms of low poverty rates, which stood at less than 20 per cent even during the late 1990s. In contrast, poverty rates in Northern regions (both Northeast and Northwest) were at much higher levels (above 60/70 per cent) and have declined much slower. By 2004, in the latter regions, more than half of the population still had incomes below the poverty line (Pincus and Sanders 2008).

Promisingly, during the last decade, poverty rates have considerably declined below 20 per cent in all regions, and by 2018, the national average stood at 6.8 per cent (based on Living Standard Surveys 2010-2018; GVN/ GSO 2020; see also Ngo Ha Quyen 2020). Nevertheless, substantial regional, ethnic and rural/ urban disparities remained. For example, poverty rates in the rural areas were almost 6 times higher than in urban areas, at 9.6 per cent and 1.5 per cent, respectively (GVN/GSO 2019, 30). For 2018, the Viet Nam Household Living Standard Survey reports slightly increased rates, which is due to new calculations, based on multiple indicators (see Figure 5.25 below).

In order to account for inflation, the Government regularly adjusted national poverty lines during the early 2010s, with revisions ranging from 10-18 per cent/ year (based on VHLSS 2016). During the past five years, rates have been stable at VND 700,000 per person for rural areas and VND 900,000 person for urban areas (see Figure 5.25). As documented by several studies, poverty rates have increased considerably during the covid-19 pandemic, and the VHLLS 2020 will hopefully shed some light on this crucial issue, which risks reversing the gradual achievements made over the past decade. As elaborated above, the most concerning account has been provided by the UN, finding that among ethnic minorities, poverty rates have again risen to above 70 per cent. Again, there are considerable knowledge gaps on this issue that urgently need to be addressed.



*Figure 5.24 Declining poverty rates (Pincus and Sanders 2008 / VHLSS 2016, 21) **

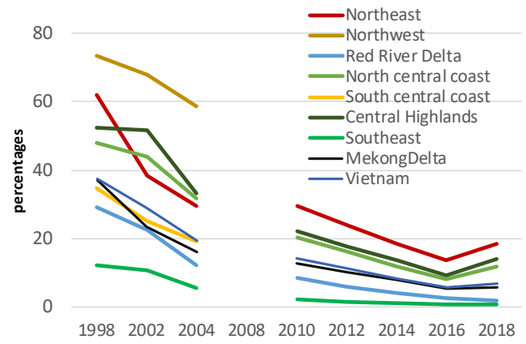
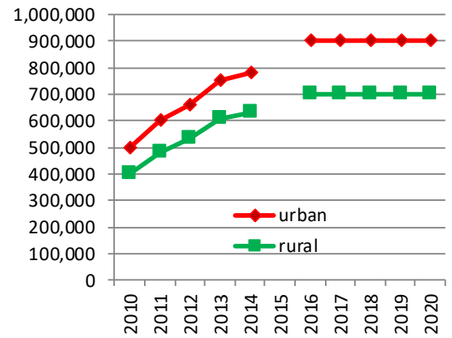



*Figure 5.25 National poverty lines 2010 – 2020 (in VND / person)*




** from 2010 onwards, the two regions of the Northeast and Northwest have been merged*

## 5.8 Social security and government support schemes – two significant blind spots

Public social security schemes are a core component of supporting households in need of assistance. While some of these schemes are based on life-cycle approaches (such as supporting children and the elderly), other schemes target vulnerable groups, including persons with disabilities or households that fall below national poverty lines. This sub-section focuses on social security and social assistance as critically important aspects of labour markets. In doing so, we will briefly summarise core policies, both international and national, before addressing the most crucial issues. Firstly, this includes an analysis of participation of the labour force in social security schemes, and disaggregating different sectors of the economy and demographic groups (gender and age).

Secondly, we shed some light upon unemployment benefits during 2020, which was a core measure to support households with members who became unemployed. Thirdly, we outline the implementation of government social assistance schemes during the covid-19 outbreak of 2020 (see 3.1). As argued above, social assistance measures are crucial to support households during any economic crisis, but even more so when combined with a global pandemic, as was the case during 2020, and to a greater extent during 2021. Despite the crucial importance of social assistance, this report identifies it as a significant blind spot.

Social security is a fundamental component of social policies at any given time (see Koehler 2020, ASEAN 2013 and 2018). At the international level, social security has been included in the UN's SDG agenda, through the promotion of the concept of decent work. Specifically, target 8.5 of goal 8 (Promote inclusive and sustainable economic growth, employment and decent work for all), advocates for "Full employment and decent work with equal pay" (ibid.). Social security is also given top priority within the first goal of reducing poverty. Indicator 1.3.1 addresses the "Proportion of population covered by social protection floors/ systems" (see UN 2015), as outlined for Viet Nam in the National Action Plan for SDGs (GVN and UN 2015). For the UN (most notably ILO), social security has become a cornerstone for defining decent work, as well as for green growth (see ILO 2021/2018, GVN/ MOLISA and ILO 2017). At the regional level, ASEAN (2013 and 2018) outlined similar goals and targets, and at the national level, several regulations and policies encompass this commitment.

Social Policies were substantially revised in 2012 by Resolution No. 15 (GVN/CP 2012), along with the drafting of a "Master Plan for Social Assistance Reform" in 2014 (see Kidd et al. 2016, 6ff). Above all, social security was incorporated into the 2013 Constitution, which states that "Citizens are guaranteed the right to social security" (Article 34). The Master Plan characterises social security schemes not only as public transfers to private households but as "investments" (ibid.). A similar argument was made by the World Bank, noting that social protection "will increasingly become a core part of economic policy and not only social policy" (2019c, ix). Social security was further strengthened by two legislations, namely the Law on Social Insurance in 2014 (GVN/National Assembly No. 58/2014) and the Labour Code 2019 (GVN/ NA 2019). As outlined above, transitioning from informal to formal labour markets (see 5.3) is a core pillar of this process, as a long-term strategy (for conceptual framework see 1.3 and Figure 1.5, above).

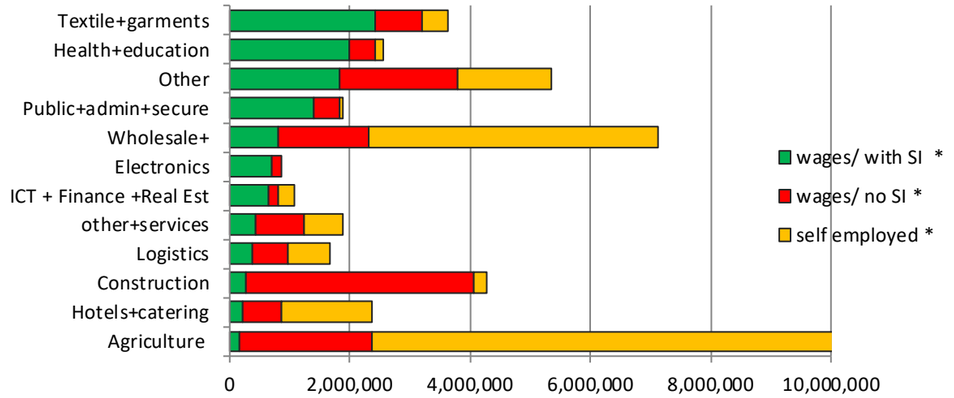
The legislation and policies outlined above are core to strengthening the labour force by supporting components of social security. To achieve this, social security is increasingly based on mandatory contributory schemes, rather than voluntary programmes. These include provisions for old age (pensions), and support during unemployment and ill health, both of which are obviously crucial during a pandemic. Accordingly, the Labour Code 2019 outlines social security, as "compulsory social insurance, health insurance and unemployment insurance schemes" (Article 169/1). The Code also adds that it "encourages [..] other supplementary social insurance schemes" (ibid. 169/2). However, these social security schemes have by and large been limited to the formal sector, while the labour force engaged in the informal sector has not been included at any meaningful scale (see also Cunningham and Pimhidzai 2018; World Bank 2019c; GVN/ MOLISA/DSS 2020; Bui Xuan Du 2009; ILO 2021f). Besides social insurance, the Social Protection Policy 2012 also outlined three additional pillars, including different types of social assistance (GVN/CP 2012). These include regular allowances, emergency funds, as well as social care centres and services (see Figure A10, annex). This policy was further strengthened in 2018, through Resolution 28 on universal coverage of social security (GVN/CP 2018).

Despite the urgency of social security schemes, this topic often remains largely overlooked. At the global level, ILO's recently published World Social Protection Report (WSPR) 2020-22, portrays a rather gloomy picture of the impact of the pandemic (ILO 2021f). One of the report's core messages is that the pandemic "has exposed deep-seated inequalities and significant gaps in social protection coverage, comprehensiveness and adequacy across all countries" (ibid., 18). However, the report also notes that the pandemic has "provoked an unparalleled social protection policy response" (ibid.). Overall, the pandemic is framed as an important policy window, with ILO proposing that "[c]ountries are at a crossroads with regard to the trajectory of their social protection systems" (ibid.). ILO therefore underlines the urgent need to establish "universal social protection and [realize] the human right to social security" (ibid., 19).

For Viet Nam, ILO's WSPR estimates coverage of social security schemes at about 38.8 per cent of the population (2021f, 274). Yet, the scope of this estimate is rather broad, since it includes all those affiliated with at least one type of social security. Among these schemes, the coverage of health insurance has reached a promising 75 per cent (ibid.), and is even higher for schemes for PWDs (at 83.5 per cent). On the other hand, schemes related to old age, unemployment and vulnerable groups are lagging critically behind, and the latter covers merely 24.6 per cent of the population (ibid.). In regard to old age, the ILO reports that 41 per cent of the labour force are now covered (ibid.), which has doubled from less than 20 per cent during 2000-05 (ibid., 175). Similar coverage increases are also evident for unemployment benefits, which stands at 66 per cent and compares favourably the low regional average of 24.2 per cent (ibid., 161), and increased from about 18 per cent in 2008 (see Bui Xuan Du 2009, 9 / 18). This earlier figure mainly accounted for workers employed at state owned or FDI companies (with coverage rates at 98 and 85 per cent, respectively), compared to less than 40 per cent of employees at domestic entreprises (ibid.).

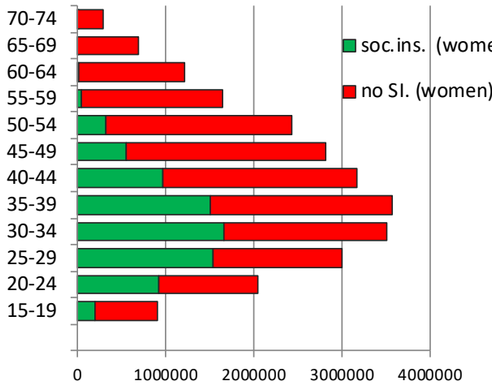
Another publication addressing social security is the World Bank's "Covid-19 Policy Response Note #3", published in April 2020 (2020c). As the sub-title suggests ("Stronger headwinds bring new challenges for the government"), the report argues the need for "downward adjustments" (ibid., 29) as a result of the pandemic, and points out the severe implications that it is likely to have. Their estimations highlight that social insurance schemes cover less than half of the labour force in most sub-sectors. The only exceptions are public administration, and health and education employees, ie. a section of the labour force that needs to be identified as employees rather than workers. Promisingly, the highest overall number of workers enrolled in social security schemes were those engaged in the textile/garment sector (see Figure 5.26; for data see Table A19, annex). Yet, even among this group, nearly one third were not enrolled in these schemes – a figure even higher in construction, wholesale, and hotel catering.

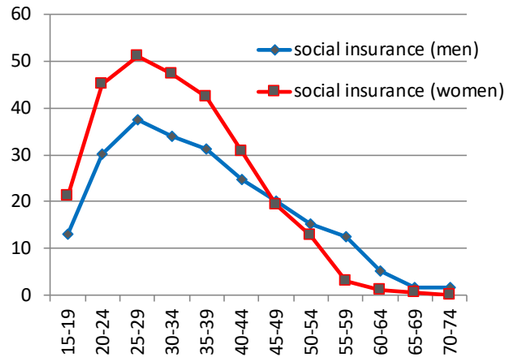
*Figure 5.26 Coverage of social insurance (SI) among the labour force in different sub-sectors (2018) calculations based on World Bank (2020d, 12); in agriculture there was a total of 20.4 million persons*




To shed more light on this, the LFSs for 2020 provide a crucial source of data on various types of social insurance, and can be disaggregated by gender and age groups. As stated above, labour contracts that include social insurance are currently predominantly limited to the formal sector (see 5.3). Furthermore, there are strong gender and age patterns in terms of coverage. Notably, in 2020 among all age groups no more than 40 – 50 per cent of workers held contracts that included social insurance, with this figure generally around 20 – 30 per cent (see Figures 5.27 / 5.28). However, data also reveals that in that enrollment in social insurance schemes is most prevalent among younger age groups (25-40; see Figures 5.27´and 5.28; for data see Table A20, annex). This indicates a promising trend in that many among this age group likely have young families and would therefore benefit from some degree of safety net in times of need. Most importantly, this age pattern indicates changes that have occurred, since younger workers will likely remain in the labour force for the next 20 – 40 years. Interestingly, a gender analysis indicates that among all younger age groups women are more likely than men to have contracts that include social insurance.

*Figures 5.27 / 5.28 Gender/age composition for labour force with/without social insurance (based on LFS 2020)*

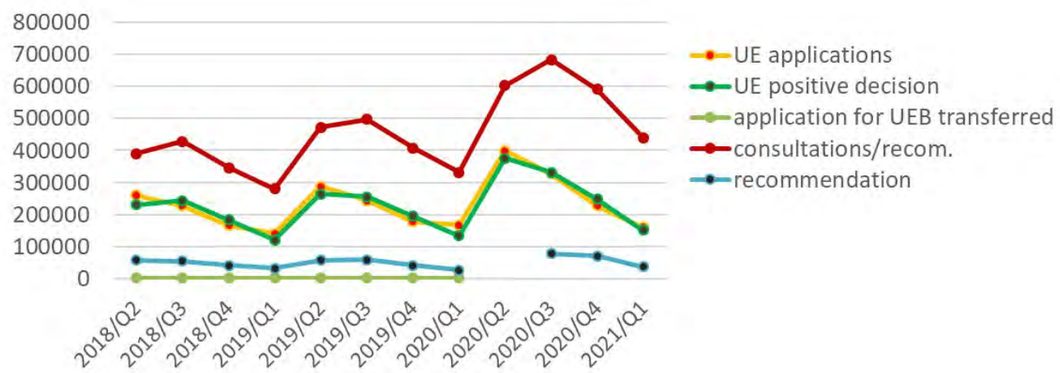


Similar data have also been confirmed by other sources. In December 2020 Vietnam Net published an article about the achievements of Resolution No. 28, characterising it as a "progressive resolution promoting the right to social security" (Thuy Nguyen 2020). Yet, while outlining some impressive results, the article also highlights the vast disparities between the formal and informal labour force. Overall, by the end of September 2020, the country had "more than 15 million people participating in social insurance" (ibid., 2). While this again documents a significant increase over the past decade, the vast majority of these members (14.1 million) are enrolled in mandatory schemes, and therefore working in the formal sector. Only a small minority of a little more than 844,000 persons participated in form of voluntary social insurance, accounting for less than 6 per cent of all social insurance members. As mentioned above, much more promisingly, health insurance coverage had increased to "nearly 87 million people [..], reaching a coverage rate of 89.6 % of the population" (ibid.).

During 2020, unemployment benefits have been an important pillar of social security. As outlined above, overall unemployment has stood at about 1 million persons during the past 2-3 years (5.2). During this period, about half among the unemployed attended consultations at Employment Service Centres (ESCs, compiled from LMUs; GVN/MOLISA and GSO 2019/2020), around half of whom then filed their applications for unemployment benefits, presumably based on eligibility. These numbers increased quite significantly during the second and third quarters of 2020, when consultations were sought by about 600-700,000 persons (see Figure 5.29, for data see Table A21, annex). Among these, about 300-400,000 persons applied for unemployment benefits, which is almost double the numbers in previous quarters. But again, when compared to actual numbers of the unemployed, this only reflects a small group. This indicates two issues: that coverage of social security was quite low and that underemployment was more significant than actual unemployment.

*Figure 5.29 Applications for unemployment benefits during 2019 and 2020 (from LMUs)*

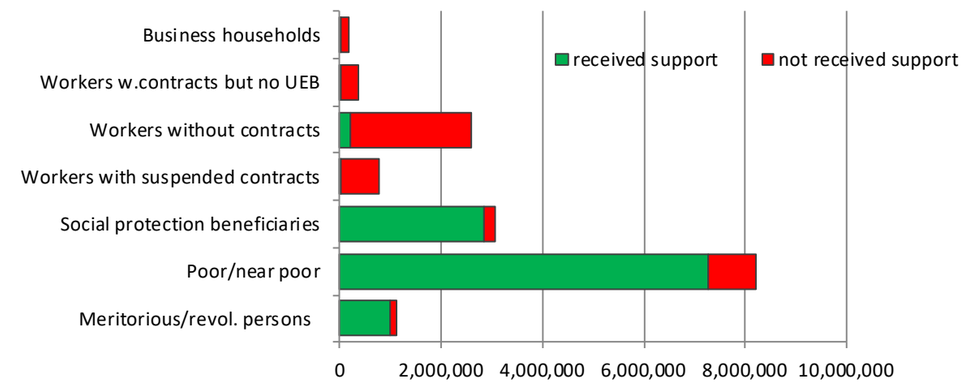



As elaborated above in the policy section (see 3.1), in addition to regular forms of social security, during April 2020, the Vietnamese Government passed a number of regulations for supporting groups effected by the covid-19 pandemic. These covered both enterprises and workers who had either lost their employment permanently or at least for several months. Resolution No. 42 clearly specified eligibility requirements, defining different groups and the support they would be given. Along with doing so, assessing and evaluating the impact of these funds is a core task for fine tuning policy measures. To this end, MOLISA undertook a survey in June 2020, in addition to a few small-scale surveys. A summary assessment was provided by GIZ and GVN/ CIEM, where they argue that "[o]ne key concern lies in the transparency of implementation process, [..] for instance, how to fully identify all eligible entities is no easy task" (ibid. 2020, 17/18). Possibly as a remedy, the MOLISA report suggests that evaluation should be placed into external hands (GVN/ MOLISA and GIZ 2020, 86) – a point of importance also for future support schemes.

Generally, assessments about disbursements of covid-19 support funds by MOLISA indicate a promisingly high level, but also indicate some challenges. One of the reports states that by July 6, more than 11 million persons could access these schemes (see GIZ and GVN/ MOLISA 2020, 19/20; see also UN 2020c, 34 for data from June). While this is equivalent to covering 68 per cent of all entitled persons, total disbursement were slightly lower (58 per cent), at VND 11,481 billion compared to an allocation of VND 19,681 billion (for details see Table A22, annex). Of high concern is that some beneficiary groups have been difficult to reach. Most critically, while 2.6 million workers without contracts were included in these schemes, 95 per cent of them had still not received any funds by early July (see Figure 5.30 below for data see Table A22; see also UN 2020c, 34). A similar comment has been included in a report from the World Bank (2020h), which notes that the number of social assistance receipts from new covid-19 specific relief programmes remains low, and that "[a]mong those who applied, the poor, rural, and ethnic minorities were less likely to receive benefits from these new programs" (ibid., 1).

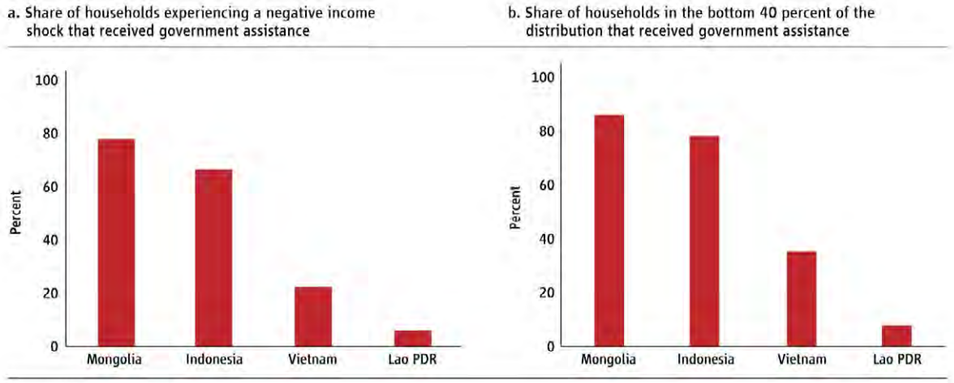
The MOLISA report also pointed out some other challenges. In addition to "complicated procedures leading to late delivery of cash" it also addressed "limited local matching funds" (ibid.). The latter issue was particularly prevalent in poor provinces, such as Binh Dinh, Hoa Binh, Nghe An and Thanh Hoa (for details see GIZ and GVN/MOLISA 2020, 18ff and UN 2020c, 30). Even prior to the new outbreak of covid-19 in 2021, MOLISA suggested extending some of the programmes to 2021 (ibid.).

*Figure 5.30 Disbursement of covid-19 social security schemes (based on GIZ and MOLISA 2020, 19/20)*




Low disbursements among low-income households was also addressed in one of the World Bank's regional studies. This compared impacts of the covid-19 pandemic on households in four countries in the Asia-Pacific region (Mongolia, Indonesia, Lao and Viet Nam). When assessing distribution among "bottom 40" households, they depicted Viet Nam as lagging substantially behind both Mongolia and Indonesia (see Figure 5.31). Specifically, only 22 per cent of the households, and less than 40 per cent among the "bottom-40", who are likely to be most in need, had received funds by July. These findings strongly support the concerns raised above. Overall, this field of research has remained a significant blind sport, and one that urgently needs to be illuminated (see 6 below).

*Figure 5.31 Assessing government programmes in South East Asia (copied from World Bank 2020h, 13)*




*Source:* EAP high frequency household phone survey, first round.
*Note:* Share of households receiving government assistance at the time of the first-round survey. Assistance programs include existing and new programs that were in place at the time of the survey flagged as part of the emergency response to the pandemic. Dates for the first round of data collection for each of the four countries in the figures are as follows: Indonesia (May 1–17, 2020), Lao PDR (June 20–July 17, 2020), Mongolia (May 22–June 2, 2020), and Vietnam (June 5–July 8, 2020).

Overall, finding studies which assess the implementation of social protection schemes has been quite challenging. This is highly concerning given that social protection has been highlighted by many agencies as an important strategy during the covid-19 pandemic of 2020, and will be even more so during 2021. In their assessment for the Asia-Pacific region, UN/ESCAP (2020) argued that social protection "is likely to become even more relevant in the emerging phase of the crisis and the recovery" (ibid., 1). They also pointed out the need "to fill gaps in the coverage, scope and adequacy of social protection" (ibid.). Accessing social support schemes and other support mechanisms is crucial, and has become even more so in 2021, due to the resurgence and protracted persistence of covid-19 outbreaks. Thus, there is clearly a need for additional analyses and research on this topic (see 6.1). While some of these analyses can be carried out based on existing data sources, other aspects require for more specific studies and study designs.

## 5.9 Educational advancements for future labour markets

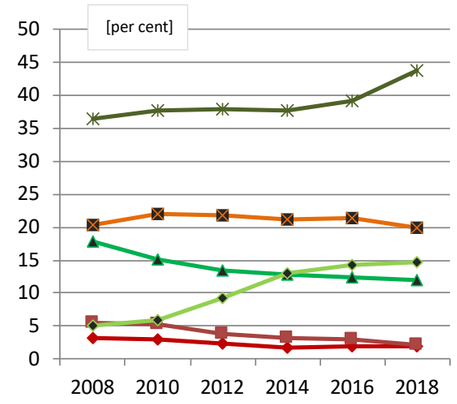
When outlining economic policies, governments worldwide place a strong focus on shifting the economy towards the service sector, and gradually towards "Industry 4.0". As outlined in the new (and previous) Socio-Economic Development Strategy and the Green Growth Strategy, as well as the National Action Plan on Green Growth (GVN/PM 2012 and GVN/PM 2014 sections III/15 and IV/1b), this requires a strong focus on human resource development in order to attain "high-quality manpower" (GVN/MPI 2021, 13ff). A World Bank report on "Vietnam's Future Jobs" succinctly captured this in a chapter entitled "skill up or lose out" (Cunningham and Pinhidzai 2018, 97ff; see also GVN/ MPI and World Bank 2016). Analyses of educational advancements provide crucial information to better understand the labour force, at any given time. Above all, cohort (age group) analyses allows for the tracking of gradual changes over the past decades, and are a key parameter for assessing future labour markets. For doing so, addressing social inclusion is paramount, as re-emphasised by UNESCO in their recent Global Monitoring Report 2020.

Generally, cohort analyses compare the 20-24 age group over successive years/decades, since most members of this age group have completed their education (other than higher university degrees). To capture changes over the past two decades, data sets have been compared from the Viet Nam Households Living Standard Surveys (VHLSS 2008 – 2018; GVN/ GSO 2019b, 123ff). Besides analysing chronological changes, we will also briefly address gender and social disparities. Overall, an analysis of educational data indicates promising changes. Over the past decade (2008 – 18), the single largest educational group were those who had completed their higher secondary education, accounting for more than 43 per cent (see Figure 5.32; for data see Table A23, annex). Promisingly, within one decade, this group has increased substantially (from 36.4 in 2008), at a rate of nearly 1 per cent annually. Even more impressively, the share of college/university graduates has nearly tripled (from 5 to 14.6 per cent), increasing by 15-20 per cent annually.



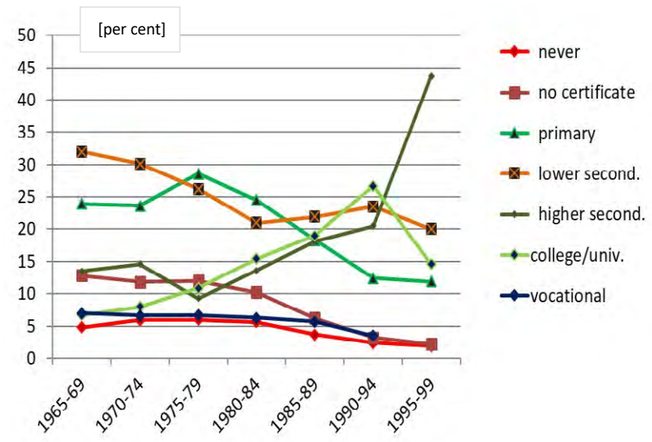
During the same period, the number of those without any certificates (or no schooling at all) declined from 8.7 to 4.1 per cent (ibid., 123ff). These educational advancements compare highly favourably to middle aged cohorts (30-34, i.e. those born about 1985-89), when more than 50 per cent had only attained an educational levels of lower secondary, or even lower (ibid., 131). Among the 40-45 age cohort (i.e. those born 1975-79), this educational level accounted for nearly three out of four persons (see Figure 5.33, for detailed data see Table A23, annex). Overall, those with higher secondary education exceed those with lower secondary education among those born after mid 1980s– a clear success of the doi moi Policy. At the college/university level, increases were even more promising. Compared to those born during the early/ mid 1970s (at 8 per cent), those born 1990-94, 26 per cent had competed their degrees, implying an increase of nearly 300 per cent, equivalent to a rate of nearly 7 per cent per year.

*Figure 5.32 Educational advancement among the 20-24-age group (for 2008 – 2018)*




*Compiled from VHLSS 2018 (GVN/GSO 2020, 130ff)*

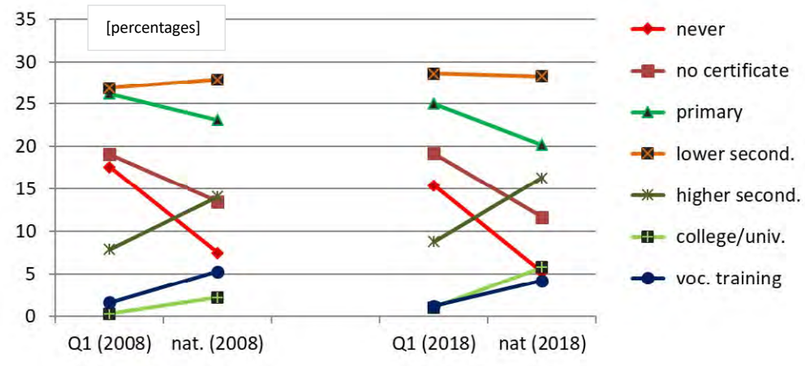
*Figure 5.33 Educational advancement for different age groups (by year of birth)*




In contrast to these success stories at the higher education level, a few issues give rise to severe concerns. First of all, even among mid-aged cohorts (aged 40-45, ie. born during the mid/late 1970s), many persons have critically low skill levels. Nearly half of these persons have only completed their primary education or even dropped out prior to doing so. Yet, these persons will remain active within the labour force for the coming 15–20 years. Thus, their skill level would urgently need to be more or less substantially increased through vocational training and skill development schemes. Yet so far, such programmes have merely benefited about 5 per cent among most age groups. Alarmingly, the number of persons participatin in vocational training has declined within the past decade, from 7 to 3.5 per cent among the 20-24 age group (see Figure 5.32; for detailed data see Table A23, annex).

Secondly, while gender disparities are promisingly low (for data see Table A23, annex), there still remain vast social and regional disparities. Among the lowest income quintile (Q1) of all age groups, even in 2018 an extremely low level of higher secondary education was evident, amounting to about half of the national average (see Figure 5.34, for data see Table A23, annex). A substantial share (at 37 per cent) did not hold any form of certificates in 2008, and this has hardly changed by 2018. Similarly, regional disparities have remained vast (see GVN/ GSO 2018, 123 ff). Above all, vocational training schemes have by and large excluded the lowest quintile. Within the past decade, participation among this group has declined from 1.6 to 1.2 per cent, compared to a national average of 5.3 per cent. To determine the extent to which this situation differs for the younger generation among low income households would require a more detailed analysis of the (original) data set.

*Figure 5.34 Social disparities for education (for 2008 -2018; based on VHLSS 2018, 123ff)*




*Nat: national average*

*Q1: lowest income quintile*

Source: AvantDG/GIZ VN

# 6. NAVIGATING A PANDEMIC - LABOUR MARKETS, SOCIAL SECRUTIY AND CRUCIAL KNOWLEDGE GAPS

As has been analysed and documented in many studies, the global covid-19 pandemic has had considerably negative impacts in South East Asia, and across the world. Overall, during 2020, the economic impacts in Viet Nam have remained much less significant than in other countries, primarily due to stringent control of pandemic outbreaks. Despite successfully "navigating the pandemic" during 2020, maintaining these achievements has proven a much more difficult and complex task, after a more contagious variant spread in Viet Nam during spring/summer 2021. As has been documented in this study, even during 2020 there were substantial impacts on macro-economic developments and labour markets, the latter in terms of both the quality and quantity of work. These impacts have been particularly challenging for low-income and vulnerable households. Understanding such shifts will be essential to formulating and fine-tuning social policies, and counter-balancing the impacts being felt during 2021, and possibly beyond.

While many crucial aspects of the impact of the pandemic have been addressed in this and other studies over the past months (see 6.1), there still remain considerable knowledge gaps. These knowledge gaps are particularly significant with regard to the changes occurring within vulnerable households, and impacts on gender and socially disadvantaged groups. These gaps will be briefly outlined (6.2). As elaborated above (see 1.3), we have concentrated the analyses for the present study on the economic sphere, focusing on the regulations in place for the labour market, and distinguishing informal and formal labour markets. To conduct comprehensive gender and social impact analyses, there is a need to fully address all three spheres (political and social, economic and social spheres), as well as the crucial inter-linkages between these spheres. As stated above, we mainly view this report as a starting point, aiming at triggering discussions.

## 6.1 Key issues related to labour markets in 2020 in the context of the covid-19 pandemic

One of the most distinctive features of labour markets in 2020, was the substantial shifts towards informal employment, a matter of grave concern. On the one hand, this shift has involved a general deterioration of working conditions, including wages. On the other hand, these changes also have had strongly negative implications for social security in terms of employment. Of particular concern is that the substantial achievements towards longer-term global and national development goals have been threatened as a result of the pandemic, with reversed achievements that have been gradually made over the past decade/s.

The need to strengthening the position of the labour force has been outlined as key in the ILO`s concept of Decent Work. More broadly, this has been addressed in the UN´s SDGs, through goal 8 (Promote inclusive and sustainable economic growth, employment and decent work for all), along with SDGs 1 (no poverty and strengthening social security, 1.3.1), 2 (no hunger), and 10 (reducing inequality). At the national level, these goals have been outlined in several economic and social policies, such as the Socio-Economic Development Strategy (2021-2030), and the Government's flagship National Green Growth Strategy (2012 and 2021). More importantly, these goals have not only been translated into legislation, such as the Labour Code 2019, but have also been confirmed as constitutional rights. Notably, in 2013, a constitutional reform has enshrined the right to social security (see 5.8), guided by ASEAN's Social Protection policies (ASEAN 2013 and 2016/18).

At the macro-level, there have been substantial declines in GDP growth rates, although positive values were maintained during 2020, in contrast to many other countries. Several sectors experienced significant impacts, particuarly those that are tightly linked to global markets and commodity chains, such as tourism and manufacturing (as analysed in 4.). These macro-economic changes had substantial impacts on labour markets (as analysed in 5.), leading to increasing unemployment and more significantly, various forms of underemployment (see 5.2). Most crucially, shifts from formal to informal types of employment have been pronounced (5.3), bringing about not only significantly reduced wages (5.4) but also the need for comprehensive coping mechanisms (5.7). For the government, the lack of employment-based social security among many low-income workers called for the need to scale up social assistance (5.8).

To illustrate these changes, (garment) manufacturing has been focused on as as a paradigmatic sector (5.5), complemented by earlier case studies from other sectors, including services and agriculture (5.6).

In summary, the economic impacts of the covid-19 pandemic in 2020, have severely jeopardised social security. These changes have been particularly difficult for the vast proportion of the labour force who had either remained in or who transitioned into informal types of employment. With many among these workers made up of women, these shifts have a strong gender dimension, and there are strong regional and locational disparities. For affected households, deteriorating standards of work and declining incomes have not only led to worse working conditions but also threatened their access to social insurance schemes. These declining working conditions call for the need to enhance access to social assistance in order to maintain an income level above poverty lines. While coping mechanisms initially relied heavily on private networks, government schemes were set in place promptly, targeting the most vulnerable groups (as outlined in 5.8).

While these can be seen as effective short-term measures, longer-term strategies need to gradually shift the labour force towards higher-income occupations. Obviously, such a shift must go hand in hand with advancing educational standards and in-creasing the availability of vocational training schemes, particularly among low-incomes households. While there are some positive indicators for this, there still remain vast and concerning social disparities, particularly among low-income families, where in-clusive education has clearly not been achieved (see 5.9). Since the pandemic outbreak in 2021 was much more devastating, educational policies need to be even more comprehensive.

## 6.2 Outlining knowledge gaps and research questions

This study has outlined many changes and trends that occurred throughout 2020. However, there remain a number of crucial knowledge gaps, which require a more nuanced understanding. One of the core topics addressed in this study is the need to better understand the relationship between informal and formal sectors. As has been elaborated above (see 5.3), there have been shifting boundaries between these two sub-sectors, with considerable, and concerning, trends for informalisation. As these two terms suggest, working arrangements and modes of governance within these sectors are distinctly different. While the formal sector is primarily regulated by the state, there are only a few mechanisms in place to safeguard the interests of the workers in the informal sector (see conceptual framework, Figure 1.5). These variations and shifts have significant practical implications in regard to social security schemes. As emphasised above, it is crucial to establish social assistance schemes that support those who cannot access employment-based social insurance schemes.

To analyse such changes, a strong focus needs to be placed on socio-economic groups that have generally been identified as the most vulnerable. This includes those engaged in low-income sectors, those who have lost their incomes, the elderly, children, and persons with disabilities (see ILSSA and giz, forthcoming). In addition, both women and migrants are highly likely to be vulnerable groups, particularly considering their share among the low-income labour force. While analyses of declining incomes have been widely undertaken, other aspects have remained critically under-researched. The latter include coping mechamisms and access to both social insurance and social assistance schemes. These are not only public schemes, but also social networks that mitigate economic (and other) difficulties.

Furthermore, knowledge gaps are substantial in regard to the composition of household incomes. This requires a more nuanced understanding of contributions from different family members, including both formal residents as well as non-resident/migrant household members. While government schemes in 2020 provided some relief funds from April to June, other public and/or private transfers may were needed, in order to off-set reduced or lost incomes. Remittances from migrant family members can be significant in this regard, particularly for families with young children and/or elderly members. More broadly, inter-generational transfers can be crucial components of household budgets, particularly among low-income households. Analysing household financial (and non-financial) resources not only includes incomes and transfers, both in cash and in kind. It also includes access to and utilisation of savings and/or borrowing cash and food from social networks, either within families, communities or wider social networks.

In addition to knowledge gaps on incomes, more detailed information about expenses and cost reductions could provide crucial information.For assessing broader and longer-term social impacts of the covid-19 pandemic, one aspect worth exploring are expenditure allocations, particularly for multi-generational families (ie. with young children and/or elderly members). For such households, balancing the needs of different generations could either affect expenditures on education (for children), and/or expenditures for health (for the elderly). In this regard, patterns of decision making within the household could be quite illustrative. Such balancing acts have been paramount, particularly during April to June 2020, prior to the general availability of government support schemes. As has been demonstrated (see 5.8), it took a while for these funds to reach some groups. Since the economic impacts in 2021 have been longer-lasting and more severe, understanding coping mechanisms has become even more crucial.

At a conceptual level, changing modes of governance need to be identified, and the crucial distinction between formal and informal labour markets needs to be analysed in more detail. This aims at specifying the core stakeholders within the economic sphere (i.e. the labour force and employers), but also the crucial interlinkages between the political and the economic spheres (see Figure 1.5). At the empirical level, while some of these knowledge gaps can be addressed from data obtained from standard national sources (such as LFSs and the VHLSS 2020), more comprehensive surveys and case studies will be instrumental. Ideally, these will be based on a well-balanced combination of qualitative and quantitative methods. To ascertain immediate policy needs, such data can serve to document the impact of the pandemic, which will be highly valuable for fine-tuning government policies. As argued above, longer-term policies on labour markets also need to consider the need to promote shifts towards higher-skilled forms of employment.

Source: Elvira Graner

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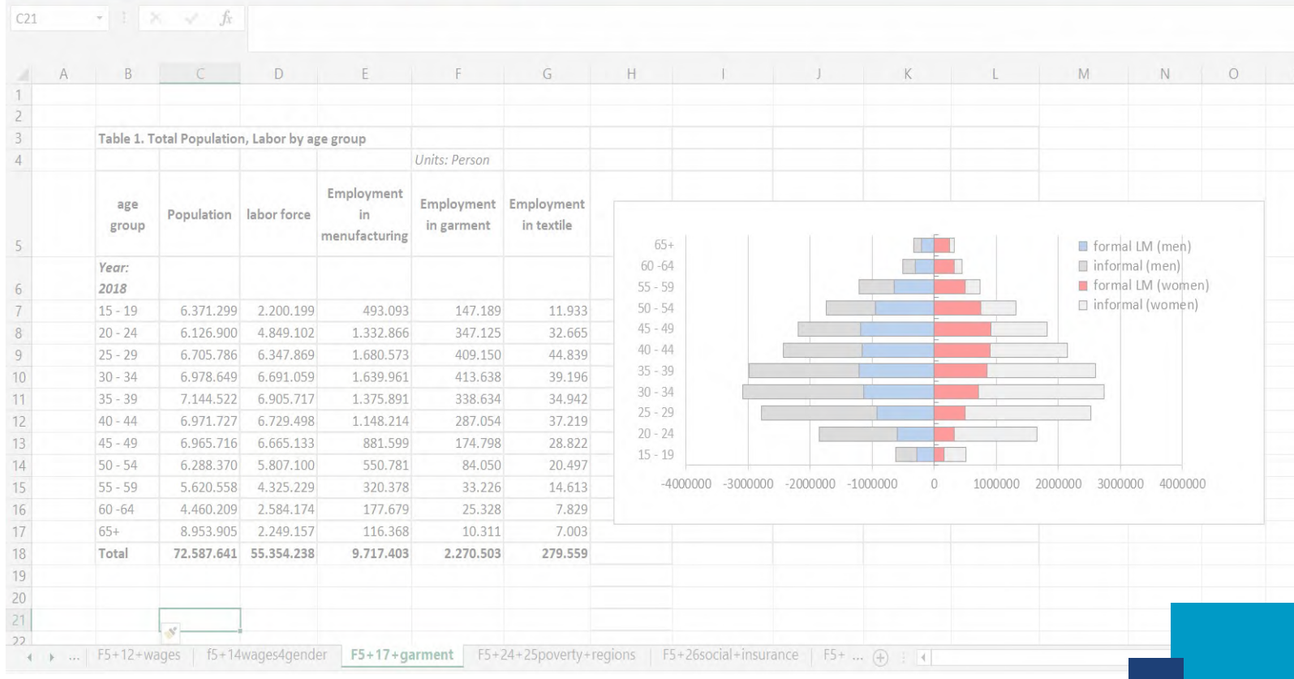


Table 1. Total Population, Labor by age group

*Units: Person*

| age group | Population | labor force | Employment in menufacturing | Employment in garment | Employment in textile |
|---|---|---|---|---|---|
| *Year: 2018* | | | | | |
| 15 - 19 | 6.371.299 | 2.200.199 | 493.093 | 147.189 | 11.933 |
| 20 - 24 | 6.126.900 | 4.849.102 | 1.332.866 | 347.125 | 32.665 |
| 25 - 29 | 6.705.786 | 6.347.869 | 1.680.573 | 409.150 | 44.839 |
| 30 - 34 | 6.978.649 | 6.691.059 | 1.639.961 | 413.638 | 39.196 |
| 35 - 39 | 7.144.522 | 6.905.717 | 1.375.891 | 338.634 | 34.942 |
| 40 - 44 | 6.971.727 | 6.729.498 | 1.148.214 | 287.054 | 37.219 |
| 45 - 49 | 6.965.716 | 6.665.133 | 881.599 | 174.798 | 28.822 |
| 50 - 54 | 6.288.370 | 5.807.100 | 550.781 | 84.050 | 20.497 |
| 55 - 59 | 5.620.558 | 4.325.229 | 320.378 | 33.226 | 14.613 |
| 60 -64 | 4.460.209 | 2.584.174 | 177.679 | 25.328 | 7.829 |
| 65+ | 8.953.905 | 2.249.157 | 116.368 | 10.311 | 7.003 |
| **Total** | **72.587.641** | **55.354.238** | **9.717.403** | **2.270.503** | **279.559** |





# 8. ANNEX

## 8.1 Figures

*Figure A1 Conceptual frameworks for assessing covid-19 impacts (World Bank 2020c, 48)*

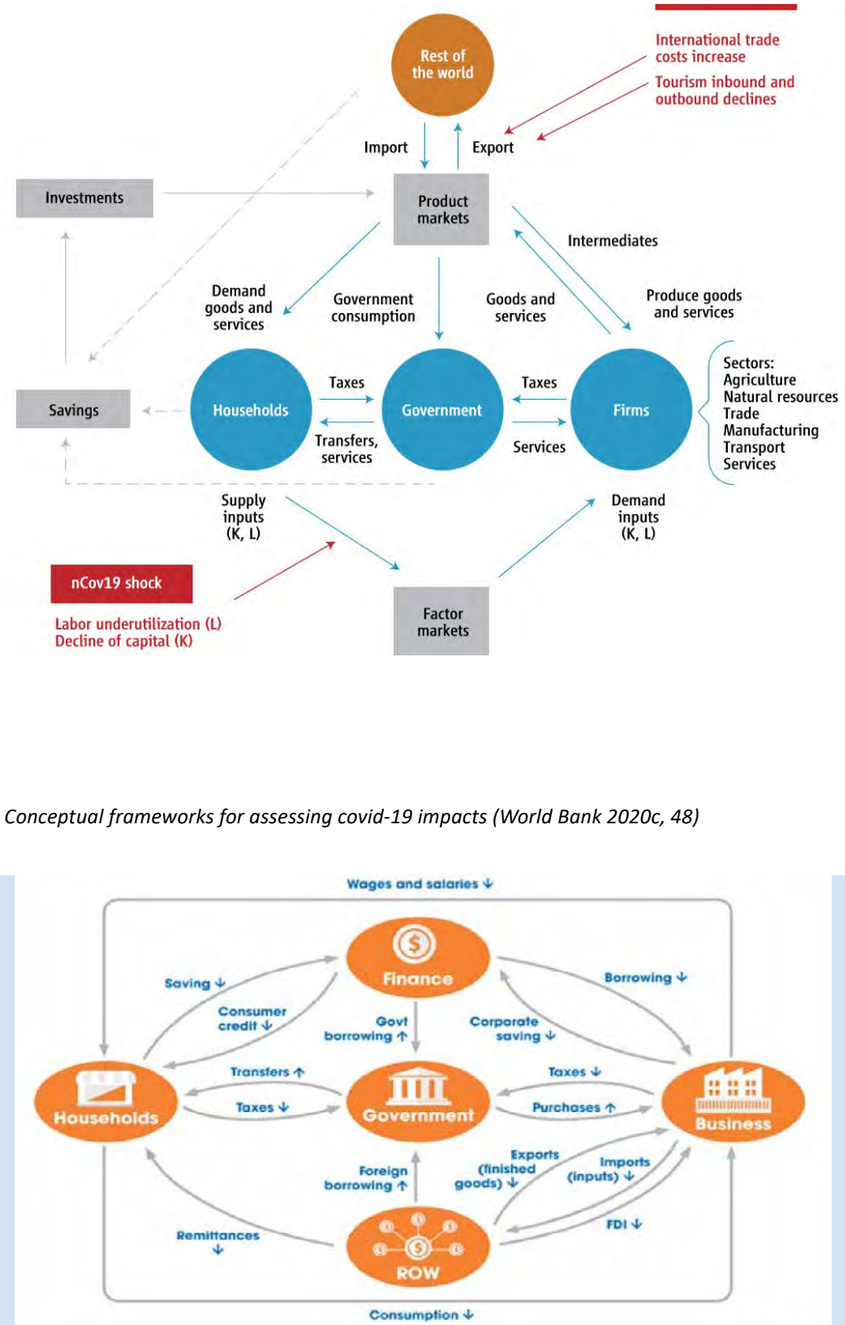



*Figure A1 Conceptual frameworks for assessing covid-19 impacts (World Bank 2020c, 48)*

*Figure A3 Conceptual framework for Social Impact Analyses (Flinders University, copied from GIZ and MDF 2020)*

*Figure A4 Conceptual framework for Social Impact Analyses (GVN, copied from GIZ and MDF 2020)*

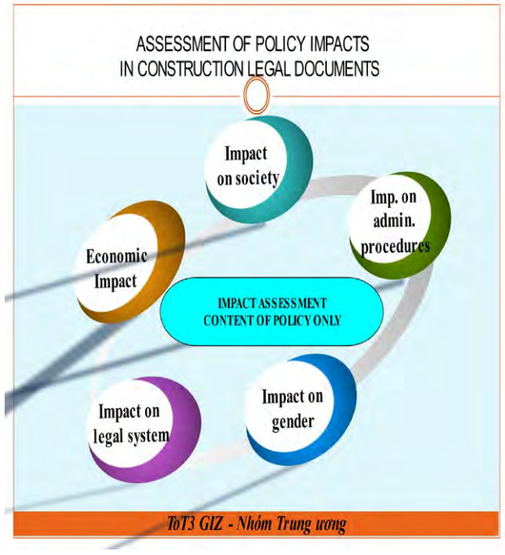



*Figure A5 News coverage about covid-19 and other global issues (1840 – 2020; Economist 2020f/ December 19)*

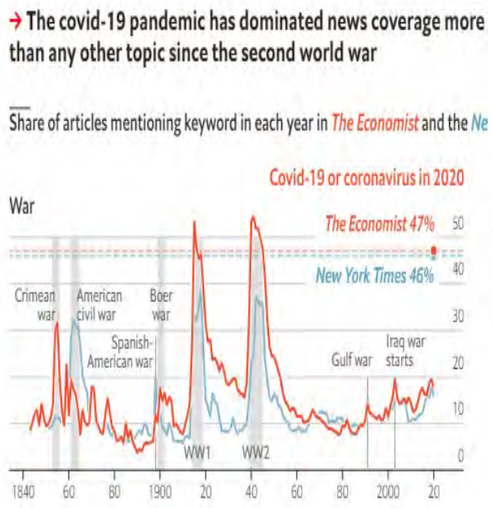



*Figure A6 Analysis of media in Viet Nam about coverage of covid-19 (during January – March 2020; Viet-Phuong La et al. 2020, 4)*

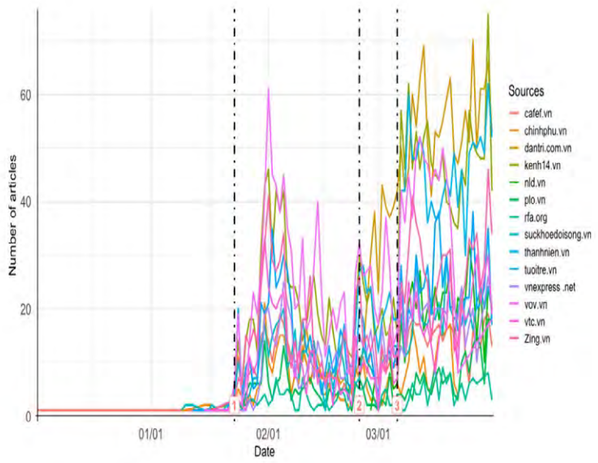



*Figure A7 Enterprises laying off workers in 2020 (from VCCI and World Bank 2021, 44)*

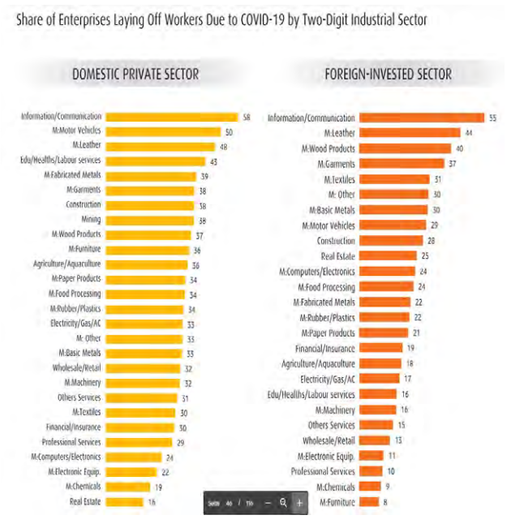



*Figure A8 Enterprises reporting revenue delcines in 2020 (from VCCI and World Bank 2021, 49)*

*Figure A9 Enterprises having revenue declines by industry (from VCCI & World Bank 2021, 72)*

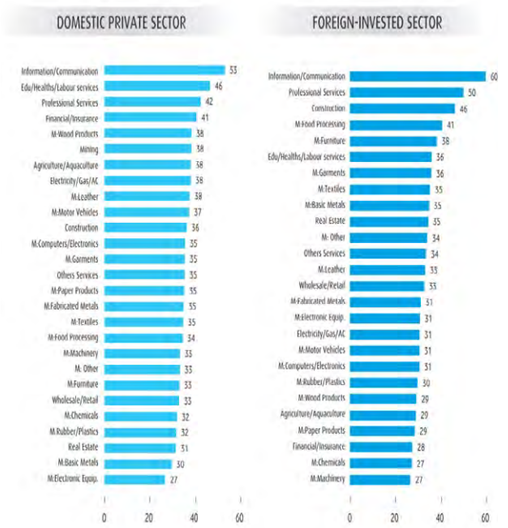
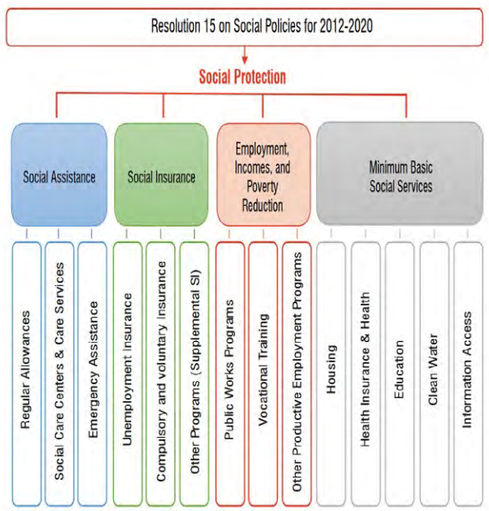



*Figure A10 Social Security schemes in Viet Nam*



**Box A1 Lyrics of the song "Ghen Co Vy" (by Khac Hung, sung by Min)**

**Ghen Co Vy (Source: Musixmatch)**

Dạo gần đây, có một virus rất hot
Tên của em ấy Corona
Em từ đâu? Quê của em ở Vũ Hán
Đang bình yên bỗng chợt thoát ra

Chắc chắn ta nên đề cao cảnh giác
Đừng để em ấy phát tán
Chắc chắn ta nên quyết tâm tự giác
Để dịch bệnh không bùng cháy lên
Cùng rửa tay xoa xoa xoa xoa đều
Đừng cho tay lên mắt mũi miệng
Và hạn chế đi ra nơi đông người
Đẩy lùi virus Corona, Corona

Luôn nâng cao sức khỏe
Và vệ sinh không gian xung quanh mình
Cùng nâng cao ý thức của xã hội
Đẩy lùi virus Corona, Corona [..]

Tuy nhỏ bé, nhưng mà em rất tàn ác
Bao người phải chết vì chính em
Tuy rằng khó, nhưng toàn dân đang cố gắng
Không để em tiếp tục lớn thêm
Chắc chắn ta nên nâng cao cảnh giác
Đừng để em ấy phát tán (yeah)
Chắc chắn ta nên quyết tâm tự giác
Để dịch bệnh không bùng cháy lên (oh whoa)

Cùng rửa tay xoa xoa xoa xoa đều
Đừng cho tay lên mắt mũi miệng
Và hạn chế đi ra nơi đông người
Đẩy lùi virus Corona, Corona
Luôn nâng cao sức khỏe
Và vệ sinh không gian xung quanh mình
Cùng nâng cao ý thức của xã hội

Đẩy lùi virus Corona, Corona
Yeah, oh, oh, oh Co-co-corona, [..]

Từng y bác sĩ luôn luôn hết lòng (yeah hey)
Từng người công nhân hay dân văn phòng (oh, no)
Người dân nơi đâu cũng luôn sẵn lòng (oh)
Việt Nam ta quyết thắng bệnh dịch, thắng bệnh dịch
Hôm nay ta sẵn sàng (hôm nay ta sẵn sàng)
Thì ngày mai ta luôn luôn vững vàng
(Thì ngày mai ta luôn vững vàng, yeah)
Dù gian nan nhưng con tim không màng
Việt Nam ta quyết thắng bệnh dịch, thắng bệnh dịch

Recently, there was a very hot virus
Her name is Corona
Where are you from? My hometown is Wuhan
Registering peacefully running away

I am sure, highly alert
Don't let her spread
I am sure, self-determined
To do not be up to the service
Together wash hands rub evenly
Do not put your hand in your eyes, nose or mouth
And limit going to crowded places
Repel Corona virus, Corona

Always improve your health
And clean the space around you
Together raise awareness of society
Repel Corona virus, Corona
Co-corona, Corona [..]

Although small small, but you are very bad bad
Tell people to die for yourself
Although difficult, but the entire population is trying
Not to me continue to add
I am sure, raise my guard
Don't let her spread (yeah)
I am sure, self-determined
To be not be up to the service (oh whoa)

Together wash hands rub evenly
Do not put your hand in your eyes, nose or mouth
And limit going to crowded places
Repel Corona virus, Corona
Always improve your health
And clean the space around her
Together raise awareness of society
Repel Corona virus, Corona

Yeah, oh, oh, oh Co-corona, Corona [..]

Ever had a doctor who was always wholehearted (yes this)
Every worker or office worker (oh, no)
People are willing to go everywhere (oh)
In Vietnam, we are determined to win the epidemic and the disease

Today we are ready (today we are available)
Tomorrow we always have gold
(Then we will always be steady tomorrow, yes)
Despite the hardship, the heart does not work
In Vietnam, we are determined to win the epidemic and the disease

**Box A2 Member of the National Steering Committee against covid-19 (based on Decision No. 170/2020/Qd-TTg (dated January 30)**

| No. | Persons in charge | Ministry / organisation |
|---|---|---|
| HSC | Mr. Vu Duc Dam | Deputy Prime Minister (Head of Steering Committee) |
| SDH | Mr. Do Xuan Tuyen | Deputy Minister of Health (Standing Deputy Head of Committee) |
| DH | Mr. Nguyen Truong Son | Deputy Minister of Health (Deputy Head of Committee) |
| 1 | Mr. Nguyen Manh Hung | Minister of Information and Communication |
| 2 | Mr. Nguyen Dac Vinh | Deputy Chief of the Office of the Party Central Committee |
| 3 | Mr. To Anh Dung | Deputy Minister of Foreign Affairs |
| 4 | Mr. Nguyen Thanh Long | Deputy Head of the Central Propaganda Department |
| 5 | Mr. Nguyen Sy Hiep | Deputy Director of Government Office |
| 6 | Ms. Pham Thuy Chinh | Vice Chairman of the Office of the National Assembly |
| 7 | Mr. Nguyen Van Son | Deputy Minister of Public Security |
| 8 | Mr. Tran Don | Deputy Minister of National Defense |
| 9 | Ms. Trinh Thi Thuy | Deputy Minister of Culture |
| 10 | Ms. Vu Thi Mai | Deputy Minister of Finance |
| 11 | Mr. Le Van Thanh | Deputy Minister of Labour, Invalids and Social Affairs |
| 12 | Mr. Nguyen Huu Do | Deputy Minister of Education and Training |
| 13 | Mr. Le Anh Tuan | Deputy Minister of Transport |
| 14 | Mr. Phung Duc Tien | Deputy Minister of Agriculture and Rural Development |
| 15 | Mr. Pham Cong Tac | Deputy Minister of Science and Technology |
| 16 | Mr. Vo Tuan Nhan | Deputy Minister of Natural Resources and Environment |
| | | |
| 17 | Mr. Le Ngoc Quang | Deputy General Director of Vietnam Television Station |
| 18 | Mr. Tran Minh Hung | Deputy General Director of Voice of Vietnam |
| 19 | Ms. Vu Viet Trang | Deputy General Director of Vietnam News Agency |
| 20 | Mr. Tran Quoc Hung | Vice President of Vietnam Red Cross Association |
| 21 | Lê Đăng Dũng | Acting President, General Director of Viettel Telecom Group. |
| 22 | Mr. Phạm Đức Long | Acting Chairman, General Director of Vietnam Post and Telecommunication Group |

## 8.2 Tables

**Table A1 Changes in labour markets for women/men in the Asia-Pacific region (2019 - 2020)**

| | | Women 2019 | Women 2020 | Men 2019 | Men 2020 | Women & Men 2019 | Women & Men 2020 |
|---|---|---|---|---|---|---|---|
| 1 | Asia-Pacific region * | 670 | 649 | 1208 | 1171 | 1878 | 1820 |
| 2 | South Asia | 139 | 134 | 518 | 492 | 657 | 626 |
| 3 | South-east Asia | 137 | 132 | 189 | 184 | 326 | 316 |
| 4 | East Asia | 394 | 383 | 501 | 495 | 895 | 878 |
| 5 | Pacific | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

*. * excluding the Pacific region* *Source: ILO 2020i, 66ff*

**Table A2 Gender and age pattern of COVID-19 cases in Viet Nam (diagnosed cases and deaths)**

| | Women/ cases (August 2020) | Women/ cases (August 2020) | Deaths (m&w), by Aug. | Women/ cases (Sept. 2020) | Men/ cases (Sept. 2020) | Deaths (m&w) by Sept. | Men (Dec 31) | Women (Dec 31) | Women/ death (Dec 31) | Men/ deaths (Dec 31) |
|---|---|---|---|---|---|---|---|---|---|---|
| 0-9 | 12 | 7 | 0 | 16 | 18 | 0 | 26 | 22 | 0 | 0 |
| 10-19 | 18 | 20 | 0 | 25 | 33 | 0 | 40 | 35 | 0 | 0 |
| 20-29 | 84 | 105 | 0 | 114 | 127 | 2 | 210 | 165 | 2 | 0 |
| 30-39 | 67 | 95 | 0 | 100 | 134 | 1 | 218 | 133 | 1 | 1 |
| 40-49 | 69 | 49 | 0 | 90 | 76 | 1 | 111 | 112 | 1 | 0 |
| 50-59 | 56 | 54 | 2 | 81 | 76 | 5 | 98 | 97 | 5 | 3 |
| 60-69 | 48 | 27 | 5 | 72 | 47 | 6 | 57 | 80 | 6 | 6 |
| 70-79 | 13 | 10 | 1 | 21 | 15 | 2 | 18 | 22 | 2 | 1 |
| 80-89 | 7 | 3 | 2 | 10 | 6 | 5 | 6 | 10 | 5 | 1 |
| 90+ | 1 | 2 | 0 | 1 | 4 | 0 | 4 | 1 | 0 | 1 |
| Total | 375 | 372 | 10 | 530 | 536 | 22 | 788 | 677 | 22 | 13 |
| 4 | East Asia | 394 | 383 | 501 | 495 | 895 | 878 | 878 | 878 | 878 |

*Sources: compiled from GVN/MOH and WHO 2020b, 2020c and 2020d*

**Table A3 (Re-)Assessments for GDP growth (from different sources)**

| | GSO /UN | ADB 2020 | IMF (2020/x) | World Bank (2020) |
|---|---|---|---|---|
| 2011 | 5.92 | | | (see Table A4) |
| 2012 | 4.93 | | | |
| 2013 | 4.9 | | | |
| 2014 | 5.22 | | | |
| 2015 | 6.32 | | | |
| 2016 | 5.65 | | | |
| 2017 | 5.83 | 6.8 | 6.9 | 6.8 |
| 2018 | 7.05 | 6.7 | 7.1 | 7.1 |
| 2019 | 6.77 | 7 | 7 | 7 |
| 2020/est. | 1.81 | 4.1 | 1.6 | 4.9 |

**Table A4 Assessments for GDP growth rates (World Bank 2020c/iv, 210)**

| | 2017 | 2018 | 2019e | 2020f | 2021f | 2022f |
|---|---|---|---|---|---|---|
| Overall GDP growth rates (at constant market prices) | 6.8 | 7.1 | 7.0 | 4.9 | 7.5 | 6.5 |
| Private consumption | 7.4 | 7.3 | 7.4 | 6.7 | 7.3 | 7.3 |
| Government consumption | 7.3 | 6.3 | 4.2 | 6.0 | 5.3 | 6.4 |
| Gross fixed capital investment | 10.2 | 8.2 | 7.9 | 7.0 | 7.1 | 7.1 |
| Exports goods/services | 16.7 | 14.3 | 7.6 | 2.6 | 8.8 | 9.1 |
| Imports goods/services | 17.5 | 12.8 | 8.3 | 2.8 | 8.5 | 9.4 |
| Real GDP growth (at constant factor prices) | 6.9 | 7.2 | 7.0 | 4.9 | 7.5 | 6.5 |
| Agriculture | 2.9 | 3.8 | 2.0 | 1.9 | 2.0 | 2.0 |
| Industry | 8.0 | 8.9 | 8.9 | 7.6 | 8.6 | 8.4 |
| Services | 7.4 | 7.0 | 7.2 | 3.3 | 8.2 | 6.2 |

*.(e) estimate (f) forecast*

**Table A5 Sectoral composition of the labour force (2012 – 2020)**

| | (sub-)sectors | 2012 | 2016 | 2018 | 2019 | 2020/Q2 |
|---|---|---|---|---|---|---|
| | T O T A L | 51,422,441 | 53,302,755 | 54,249,439 | 54,659,188 | 51,810,000 |
| 1 | Agri Fish& Forestry | 24,347,933 | 22,313,932 | 20,465,122 | 18,831,358 | 17,044,449 |
| 2 | Mining & quarry | 285,280 | 214,378 | 181,375 | 197,861 | 171,231 |
| 3 | Manufacturing | 7,099,528 | 8,882,724 | 9,717,403 | 11,287,640 | 10,950,177 |
| 4 | Electricity/gas | 129,467 | 160,180 | 168,329 | 192,797 | 172,011 |
| 5 | water/sewage/waste | 107,741 | 134,075 | 146,788 | 163,163 | 168,590 |
| 6 | construction | 3,270,258 | 3,806,862 | 4,273,264 | 4,615,202 | 4,568,113 |
| 7 | Wholesale | 6,311,481 | 6,774,825 | 7,323,528 | 7,279,939 | 7,109,298 |
| 8 | transportation (& storage) | 1,497,746 | 1,608,335 | 1,774,301 | 1,970,825 | 1,926,274 |
| 9 | accommodation & food | 2,136,581 | 2,481,250 | 2,752,587 | 2,739,429 | 2,608,359 |
| 10 | information & communication | 283,524 | 325,119 | 321,020 | 346,827 | 329,168 |
| 11 | Finance & Insurance | 312,411 | 400,234 | 422,541 | 482,629 | 451,870 |
| 12 | real estate | 148,083 | 187,628 | 266,802 | 303,356 | 294,241 |
| 13 | Prof./S&Techn. | 248,698 | 226,128 | 290,049 | 310,483 | 335,604 |
| 14 | admin. & support | 229,176 | 262,507 | 341,264 | 355,494 | 325,463 |
| 15 | publi. admin. (& military) | 1,582,146 | 1,731,221 | 1,681,291 | 1,465,126 | 1,426,195 |
| 16 | Educ & Training | na. | na. | na. | 1,986,298 | 1,910,840 |
| 17 | Health & soc.work | 1,766,409 | 1,884,383 | 2,121,150 | 612,255 | 585,469 |
| 18 | Entertainment/arts | 482,226 | 569,552 | 595,889 | 271,894 | 255,979 |
| 19 | Other services | na. | na. | na. | 1,015,823 | 979,923 |
| 20 | Household employment | na. | na. | na. | 227,052 | 193,852 |
| 21 | International org. | na. | na. | na. | 3,738 | 935,430 |

*Sources: calculated from different LFSs (for 2020: quarter 2); LFS states the total labour force, and provides percentages for all other information (such as different sectors)*

**Table A6 Unemployment rates during 2018 – 2020 (based on LFSs / LMUs)**

| | 2018/ Q4 | 2019/ Q1 | 2019/ Q2 | 2019/ Q3 | 2019/ Q4 | 2020/ Q1 | 2020/ Q2 | 2020/ Q3 | 2020/ Q4 |
|---|---|---|---|---|---|---|---|---|---|
| Total numbers | 1,062.4 | 1,059.1 | 1,054.3 | 1,064.1 | 1,063.8 | 1086 | 1278.9 | 1215.9 | 1155.8 |
| (1) Rate all | 2.17 | 2.17 | 2.16 | 2.17 | 2.15 | 2.22 | 2.73 | 2.5 | 2.37 |
| (2) Rates women | 2.49 | 2.1 | 2.23 | 2.35 | 2.16 | 2.13 | 2.91 | 3.27 | 3.22 |
| (3) Rates men | 1.9 | 2.22 | 2.04 | 2.01 | 2.15 | 2.59 | | 1.87 | 1.65 |
| (4) Rates urban | 3.1 | 3.1 | 3.1 | 3.11 | 3.1 | 3.18 | 4.46 | 4 | 3.68 |
| (5) Rates rural | 1.68 | 1.67 | 1.65 | 1.66 | 1.64 | 1.73 | 1.8 | 1.73 | 1.69 |
| (6) Rates youth | 5.62 | 6.29 | 6.47 | 6.53 | 6.38 | 7.01 | 6.98 | 7.24 | 7.05 |
| Changes * numbers | | -0.31 | -0.45 | 0.93 | -0.03 | 2.09 | 17.76 | -4.93 | -4.94 |
| Changes/all | | 0.00 | -0.46 | 0.46 | -0.92 | 3.26 | 22.97 | -8.42 | -5.20 |
| Changes/women | | 0.00 | 0.00 | 0.32 | -0.32 | 2.58 | 40.25 | -10.31 | -8.00 |
| Changes/men | | -0.60 | -1.20 | 0.61 | -1.20 | 5.49 | 4.05 | -3.89 | -2.31 |
| Changes/urban | | -15.66 | 6.19 | 5.38 | -8.09 | -1.39 | 36.62 | 12.37 | -1.53 |
| Changes/rural | | 16.84 | -8.11 | -1.47 | 6.97 | 20.47 | -22.78 | -6.50 | -11.76 |
| Changes/youth | | 11.92 | 2.86 | 0.93 | -2.30 | 9.87 | -0.43 | 3.72 | -2.62 |

*.* changes between two successive quarters (in pc)*

**Table A7 Composition of the labour force in formal / informal sectors (2014 –20) [in 1,000 persons]**

| | 2014 | 2015 | 2016 | 2019 | 2020/Q1 | 2020/Q2 | 2020/Q3 |
|---|---|---|---|---|---|---|---|
| (1) TOTAL LF * | 52,660.9 | 52,803.2 | 53,296.3 | 55,767.4 | 55,331.5 | 53,147.4 | 54,580.4 |
| (2) Agricultural | 24,042.0 | 22,716.0 | 21,807.1 | 18,078.3 | 17,425.1 | 16,109.0 | 16,553.9 |
| (3) Informal | 16,829.1 | 17,534.2 | 18,018.4 | 14,335.7 | 14,114.1 | 13,771.8 | 14,309.6 |
| (4) Formal | 11,789.8 | 12,553.0 | 13,470.8 | 22,245.3 | 22,674.1 | 21,930.4 | 22,464.5 |
| (5) Sub-total (2+4) | 28,618.9 | 30,087.2 | 31,489.2 | 36,580.9 | 36,788.2 | 35,702.1 | 36,774.1 |
| pc/agri (from 1) | 45.7 | 43.0 | 40.9 | 32.4 | 31.5 | 30.3 | 30.3 |
| pc/formal (from 5) | 41.2 | 41.7 | 42.8 | 60.8 | 61.6 | 61.4 | 61.1 |
| pc/infm. (from 5) | 58.8 | 58.3 | 57.2 | 39.2 | 38.4 | 38.6 | 38.9 |
| changes (agri.) | n.a. | -5.52 | -4.00 | n.a. | -3.61 | -7.55 | 2.76 |
| changes (informal) | n.a. | 4.19 | 2.76 | n.a. | -1.55 | -2.43 | 3.90 |
| changes (formal) | n.a. | 6.47 | 7.31 | n.a. | 1.93 | -3.28 | 2.44 |
| sources: | ILO 2017 | ILO 2017 | ILO 2017 | LFS 2019 | LFS 2020a | LFS 2020b | LFS 2020c |

*. * incl. unemployed (n.a. – not available)*

*Sources: calculated from different LFSs data bases (GVN/GSO 2020b); for 2014-2016 ILO 2017*

**Table A8a Age composition of women labour force in 2019 (for formal/informal; based on LFS 2019)**

| age groups | (1) unem-ployed | (2) agriculture (women) | (3) informal (women) | (4) formal (women) | (5) (sub-)total (2+3+4) | Pc (3/ 3+4) | pc/ (2/ 5) | pc/ (3/ 5) | pc/ (4/ 5) | per cent (1/ LF) |
|---|---|---|---|---|---|---|---|---|---|---|
| 15 – 19 | 79,287 | 395,341 | 151,616 | 361,139 | 908,096 | 29.6 | 43.5 | 16.7 | 39.8 | 8.0 |
| 20 – 24 | 134,958 | 495,970 | 309,946 | 1,346,436 | 2,152,352 | 18.7 | 23.0 | 14.4 | 62.6 | 5.9 |
| 25 – 29 | 118,810 | 614,537 | 472,513 | 2,057,142 | 3,144,191 | 18.7 | 19.5 | 15.0 | 65.4 | 3.6 |
| 30 – 34 | 63,471 | 744,713 | 669,399 | 2,065,338 | 3,479,449 | 24.5 | 21.4 | 19.2 | 59.4 | 1.8 |
| 35 – 39 | 36,395 | 866,138 | 813,152 | 1,785,762 | 3,465,052 | 31.3 | 25.0 | 23.5 | 51.5 | 1.0 |
| 40 – 44 | 28,847 | 945,955 | 879,187 | 1,265,258 | 3,090,400 | 41.0 | 30.6 | 28.4 | 40.9 | 0.9 |
| 45 – 49 | 23,616 | 1,080,240 | 892,853 | 932,324 | 2,905,417 | 48.9 | 37.2 | 30.7 | 32.1 | 0.8 |
| 50 – 54 | 15,508 | 1,186,754 | 741,810 | 578,965 | 2,507,529 | 56.2 | 47.3 | 29.6 | 23.1 | 0.6 |
| 55 – 59 | 16,961 | 1,017,864 | 502,671 | 239,144 | 1,759,679 | 67.8 | 57.8 | 28.6 | 13.6 | 1.0 |
| 60 -64 | 6,851 | 805,004 | 324,569 | 119,669 | 1,249,242 | 73.1 | 64.4 | 26.0 | 9.6 | 0.5 |
| 65 -69 | 3,664 | 496,901 | 157,527 | 52,474 | 706,902 | 75.0 | 70.3 | 22.3 | 7.4 | 0.5 |
| 70+ | 1,471 | 391,538 | 93,296 | 13,811 | 498,645 | 87.1 | 78.5 | 18.7 | 2.8 | 0.3 |
| Total | 529,839 | 9,040,954 | 6,008,538 | 10,817,463 | 25,866,955 | 35.7 | 35.0 | 23.2 | 41.8 | 2.0 |

*Source: calculated from LFS 2019 (GVN/GSO 2019a); LF : labour force*

**Table A8b Age composition of men labour force in 2019 (for formal/informal; based on LFS 2019)**

| age groups | (1) unem-ployed | (2) agriculture (men) | (3) informal (men) | (4) formal (men) | (5) (sub-)total (2+3+4) | Pc (3/ 3+4) | pc/ (2/ 5) | pc/ (3/ 5) | pc/ (4/ 5) | per cent (1/ LF) |
|---|---|---|---|---|---|---|---|---|---|---|
| 15 – 19 | 92,658 | 550,793 | 347,390 | 277,448 | 1,175,631 | 55.6 | 46.9 | 29.5 | 23.6 | 7.3 |
| 20 – 24 | 159,429 | 608,080 | 1,261,520 | 587,473 | 2,457,072 | 68.2 | 24.7 | 51.3 | 23.9 | 6.1 |
| 25 – 29 | 106,441 | 702,651 | 1,893,688 | 889,512 | 3,485,851 | 68.0 | 20.2 | 54.3 | 25.5 | 3.0 |
| 30 – 34 | 61,058 | 804,937 | 2,001,171 | 1,079,880 | 3,885,988 | 65.0 | 20.7 | 51.5 | 27.8 | 1.5 |
| 35 – 39 | 43,465 | 817,942 | 1,826,134 | 1,162,096 | 3,806,173 | 61.1 | 21.5 | 48.0 | 30.5 | 1.1 |
| 40 – 44 | 32,612 | 893,352 | 1,306,801 | 1,128,477 | 3,328,629 | 53.7 | 26.8 | 39.3 | 33.9 | 1.0 |
| 45 – 49 | 30,622 | 975,353 | 1,047,591 | 1,148,902 | 3,171,845 | 47.7 | 30.8 | 33.0 | 36.2 | 1.0 |
| 50 – 54 | 22,822 | 1,097,164 | 820,480 | 923,494 | 2,841,138 | 47.0 | 38.6 | 28.9 | 32.5 | 0.8 |
| 55 – 59 | 15,188 | 1,051,357 | 587,671 | 624,001 | 2,263,029 | 48.5 | 46.5 | 26.0 | 27.6 | 0.7 |
| 60 – 64 | 7,961 | 714,712 | 208,195 | 305,618 | 1,228,525 | 40.5 | 58.2 | 16.9 | 24.9 | 0.6 |
| 65 – 69 | 3,290 | 453,929 | 95,332 | 134,470 | 683,731 | 41.5 | 66.4 | 13.9 | 19.7 | 0.5 |
| 70+ | 2,839 | 367,046 | 31,826 | 65,750 | 464,622 | 32.6 | 79.0 | 6.8 | 14.2 | 0.6 |
| Total | 578,383 | 9,037,316 | 11,427,797 | 8,327,120 | 28,792,233 | 57.8 | 31.4 | 39.7 | 28.9 | 2.0 |

*Source: calculated from LFS 2019 (GVN/GSO 2019a); LF : labour force*

**Table A9a Gender and age composition of labour force in 2020/Q2 (for formal/informal; LFS 2020/Q2)**

| age groups | TOTAL LF (women) | TOTAL LF (men) | agriculture (women) | formal (women) | informal (women) | formal (men) | Informal (men) |
|---|---|---|---|---|---|---|---|
| 15 – 19 | 773,585 | 1,012,884 | 292,707 | 295,531 | 127,097 | 299,185 | 231,321 |
| 20 – 24 | 1,869,673 | 2,220,566 | 402,873 | 1,097,883 | 245,938 | 1,059,837 | 515,749 |
| 25 – 29 | 2,916,260 | 3,344,800 | 539,399 | 1,819,057 | 447,550 | 1,828,624 | 777,608 |
| 30 – 34 | 3,474,027 | 3,766,388 | 684,670 | 2,110,932 | 581,767 | 1,957,947 | 975,776 |
| 35 – 39 | 3,545,826 | 3,904,610 | 745,318 | 1,895,823 | 827,839 | 1,875,863 | 1,188,727 |
| 40 – 44 | 3,176,393 | 3,450,577 | 867,151 | 1,393,636 | 868,506 | 1,454,208 | 1,135,229 |
| 45 – 49 | 2,771,587 | 3,141,711 | 940,284 | 919,265 | 858,438 | 1,125,440 | 1,113,592 |
| 50 – 54 | 2,407,323 | 2,783,400 | 1,025,961 | 634,019 | 703,173 | 808,859 | 961,391 |
| 55 – 59 | 1,622,703 | 2,229,735 | 924,957 | 231,744 | 448,875 | 576,391 | 641,559 |
| 60 –64 | 1,190,862 | 1,212,562 | 737,178 | 122,779 | 318,815 | 221,620 | 321,697 |
| 65 – 69 | 688,764 | 689,598 | 469,581 | 50,300 | 165,503 | 87,910 | 141,516 |
| 70+ | 488,254 | 465,315 | 361,522 | 20,685 | 103,708 | 42,821 | 70,408 |
| total 1 | 24,925,257 | 28,222,151 | 7,991,600 | 10,591,654 | 5,697,209 | 11,338,710 | 8,074,580 |
| sources: | ILO 2017 | ILO 2017 | ILO 2017 | LFS 2019 | LFS 2020a | LFS 2020b | LFS 2020c |

*Sources: calculated from LFS 2019 (GVN/GSO 2019a) and LFS 2020/Q2 (GVN/GSO 2020b)*

**Table A9b Informality among women in 2019 (for formal/informal; LFS 2019), total 36.207 mio WM**

| age groups | LF | agriculture | Formal/ Formal (1) | Formal/ Informal(2) | informal (3) | Sub-total (1+2+3) | Per cent1 | Per cent2 | |
|---|---|---|---|---|---|---|---|---|---|
| 15 – 19 | 1,268,289 | 550,793 | 165,936 | 182,260 | 276,641 | 624,837 | 26.6 | 29.2 | 44.3 |
| 20 – 24 | 2,616,501 | 608,080 | 859,097 | 404,445 | 585,452 | 1,848,993 | 46.5 | 21.9 | 31.7 |
| 25 – 29 | 3,592,292 | 702,651 | 1,387,468 | 509,153 | 886,579 | 2,783,200 | 49.9 | 18.3 | 31.9 |
| 30 – 34 | 3,947,045 | 804,937 | 1,430,043 | 571,790 | 1,079,217 | 3,081,050 | 46.4 | 18.6 | 35.0 |
| 35 – 39 | 3,849,638 | 817,942 | 1,260,235 | 567,013 | 1,160,983 | 2,988,230 | 42.2 | 19.0 | 38.9 |
| 40 – 44 | 3,361,241 | 893,352 | 831,352 | 476,023 | 1,127,903 | 2,435,277 | 34.1 | 19.5 | 46.3 |
| 45 – 49 | 3,202,468 | 975,353 | 607,341 | 440,748 | 1,148,403 | 2,196,492 | 27.7 | 20.1 | 52.3 |
| 50 – 54 | 2,863,960 | 1,097,164 | 483,708 | 337,143 | 923,123 | 1,743,974 | 27.7 | 19.3 | 52.9 |
| 55 – 59 | 2,278,217 | 1,051,357 | 353,246 | 234,713 | 623,713 | 1,211,672 | 29.2 | 19.4 | 51.5 |
| 60 –64 | 1,236,486 | 714,712 | 92,380 | 115,815 | 305,618 | 513,813 | 18.0 | 22.5 | 59.5 |
| 65 – 69 | 687,021 | 453,929 | 37,922 | 57,409 | 134,470 | 229,802 | 16.5 | 25.0 | 58.5 |
| 70 – 74 | 291,899 | 220,715 | 8,081 | 17,532 | 43,658 | 69,270 | 11.7 | | |
| total | 29,370,616 | 9,037,316 | 7,518,031 | 3,919,037 | 8,317,849 | 19,754,917 | 38.1 | | |

*Sources: calculated from LFS 2019 (GVN/GSO 2019a) and LFS 2020/Q2 (GVN/GSO 2020b)*

**Table A10 Shares of informal and formal labour force in different sectors in 2019 and 2019**

| age groups | Informal labour force 2016 [1,000] | Total (2016) | LFS 2019 formal/ formal+ sector | LFS 2019 informal in formal (2) | LFS 2019 informal LF in informal (1) | Pc/ inf 1 | Pc/ inf2 |
|---|---|---|---|---|---|---|---|
| AFF (agriculture/fish-eries/ forestry) * | 270.2 | 1.5 | 164,642 | 211,170 | 377,277 | 2.00 | 1.12 |
| Mining/quarry | 97.2 | 0.5 | 131,690 | 30,320 | 35,851 | 18.1 | 15.32 |
| Manufacturing | 4,236.10 | 23.5 | 7,260,452 | 1,460,439 | 2,566,749 | 22.7 | 12.94 |
| Electric | 31 | 0.2 | 163,814 | 22,474 | 6,508 | 3.4 | 11.66 |
| Water and sewage | 41.1 | 0.2 | 109,485 | 18,278 | 35,400 | 21.7 | 11.20 |
| Construction | 3,434.60 | 19.1 | 472,127 | 441,879 | 3,701,197 | 80.2 | 9.57 |
| Wholesale and retail | 4,725.00 | 26.2 | 1,200,875 | 2,371,242 | 3,707,821 | 50.9 | 32.57 |
| Transport and storage | 1,045.70 | 5.8 | 617,243 | 505,691 | 847,891 | 43.0 | 25.66 |
| Hotels and restaurants | 2,002.10 | 11.1 | 293,513 | 859,380 | 1,586,537 | 57.9 | 31.37 |
| Information & communication | 58.2 | 0.3 | 286,502 | 46,022 | 14,303 | 4.1 | 13.27 |
| FBI (finance, banking, insurance) | 63 | 0.3 | 433,368 | 34,919 | 14,343 | 2.9 | 7.24 |
| Real estate | 98.7 | 0.5 | 130,368 | 67,048 | 105,940 | 34.9 | 22.10 |
| Technological / science | 71.2 | 0.4 | 197,820 | 55,399 | 57,264 | 18.4 | 17.84 |
| Administrative | 130.2 | 0.7 | 211,100 | 54,627 | 89,767 | 25.2 | 15.37 |
| Party and security | 314.8 | 1.7 | 1,416,155 | 40,876 | 8,095 | 0.5 | 2.79 |
| Training and education | 197.5 | 1.1 | 1,844,644 | 70,667 | 70,987 | 3.6 | 3.56 |
| Health and social work | 97.8 | 0.5 | 544,953 | 45,782 | 21,520 | 3.5 | 7.48 |
| Recreational + culture | 184.6 | 1 | 73,777 | 69,437 | 128,681 | 47.3 | 25.54 |
| Other services | 709.8 | 3.9 | 59,548 | 239,469 | 716,806 | 70.6 | 23.57 |
| Employment generated by households | 208.7 | 1.2 | 1,250 | 7,983 | 217,820 | 95.9 | 3.52 |
| International orgnisations/ bodies | 0.1 | 0.0 | 3,318 | 268 | 152 | 4.1 | 7.16 |
| T O T A L | 18,018.4 | 100 | 15,133,307 | 6,504,609 | 13,886,497 | 39.1 | 18.3 |
| Sources | ILO | ILO | GVN/GSO | GVN/GSO | GVN/GSO | calc. | calc. |

*.* agriculture comprises a total of 18.831 million persons,*

*Source: ILO 2017, 30 and calculated from GVN/GSO (2019 and 2020)*

**Table A11 Share of formal and informal labour force in different provinces (for 2016, based on ILO and GVN/GSO 2017, 60)**

| No. | province | formal 2016 | Informal 2016 | No. | province | formal 2016 | Informal 2016 |
|---|---|---|---|---|---|---|---|
| 1 | N A T I O N A L | 42.8 | 57.2 | 20 | Hoa Binh | 41.1 | 58.9 |
| 2 | Kom Tun | 60.6 | 39.4 | 21 | Thanh Hoa | 40.9 | 59.1 |
| 3 | Binh Phuoc | 58.1 | 41.1 | 22 | Vinh Phuc | 40.7 | 59.3 |
| 4 | Dien Bien | 56.6 | 43.4 | 23 | Phu Tho | 39.1 | 60.9 |
| 5 | Cao Bang | 55.1 | 44.9 | 24 | Quang Tri | 38.7 | 61.3 |
| 6 | Ho Chi Minh City | 54.8 | 45.2 | 25 | Tuyen Quang | 38.5 | 61.5 |
| 7 | Quang Ninh | 54.4 | 45.6 | 26 | Bac Ninh | 38.5 | 61.5 |
| 8 | Bac Giang | 54.1 | 45.9 | 27 | Nghe An | 36.9 | 63.1 |
| 9 | Lao Cai | 54 | 46 | 28 | Ha Tinh | 36.9 | 63.1 |
| 10 | Ha Giang | 53.4 | 46.6 | 29 | Yen Bai | 36 | 64 |
| 11 | Son La | 53.1 | 46.9 | 30 | Ha Nam | 34.7 | 65.3 |
| 12 | Bac Kan | 51.8 | 48.2 | 31 | Ninh Binh | 33.6 | 66.4 |
| 13 | Thai Nguyen | 50.6 | 49.4 | 32 | Thai Binh | 31.7 | 68.3 |
| 14 | Lai Chau | 50.3 | 49.7 | 33 | Ben Tre | 29.1 | 70.8 |
| 15 | Hanoi City | 47.7 | 52.3 | 34 | Quang Binh | 28.5 | 71.5 |
| 16 | Hai Duong | 44.9 | 55.1 | 35 | Nam Dinh | 26 | 74 |
| 17 | Lang Son | 44.1 | 55.9 | 36 | Soc Trang | 24.2 | 75.8 |
| 18 | Hung Yen | 42.5 | 57.5 | 37 | Bac Lieu | 23 | 77 |
| 19 | Hai Phong City | 42 | 58 | 38 | An Giang | 21.7 | 78.3 |

**Table A12 Regulations for minimum wages (2001 – 2020) (compiled from Do Quynh Chi 2017 and other sources)**

| Year | R1/ dom | R4/ dom | R1/ FDI | R4/ FDI | gap/ FDI:dom | del/ dom | del/ FDI | del/ R1 FDI | del/ R4 FDI | del/ R1 dom | del/ R4 dom |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2001 | 210 | 210 | 495 | 385 | | | 22.22 | 0.0 | 0.0 | | |
| 2002 | 210 | 210 | 495 | 385 | 135.71 | 0.0 | 22.22 | 0.0 | 0.0 | 0.0 | 0.0 |
| 2003 | 290 | 290 | 495 | 385 | 70.69 | 0.0 | 22.22 | 0.0 | 0.0 | 38.10 | 38.10 |
| 2004 | 290 | 290 | 495 | 385 | 70.69 | 0.0 | 22.22 | 0.0 | 0.0 | 0.0 | 0.0 |
| 2005 | 290 | 290 | 495 | 385 | 70.69 | 0.0 | 22.22 | 75.76 | 84.42 | 0.0 | 0.0 |
| 2006 | 350 | 350 | 870 | 710 | 148.57 | 0.0 | 18.39 | 0.0 | 0.00 | 20.69 | 20.69 |
| 2007 | 450 | 450 | 870 | 710 | 93.33 | 0.0 | 18.39 | 14.94 | 12.68 | 28.57 | 28.57 |
| 2008 | 620 | 540 | 1000 | 800 | 61.29 | 14.81 | 20.00 | 20.00 | 15.00 | 37.78 | 20.00 |
| 2009 | 800 | 650 | 1200 | 920 | 50.00 | 23.08 | 23.33 | 11.67 | 8.70 | 29.03 | 20.37 |
| 2010 | 980 | 730 | 1340 | 1000 | 36.73 | 34.25 | 25.37 | 15.67 | 10.00 | 22.50 | 12.31 |
| 2011 | 1350 | 830 | 1550 | 1100 | 14.81 | 62.65 | 29.03 | 29.03 | 27.27 | 37.76 | 13.70 |
| 2012 | 2000 | 1400 | 2000 | 1400 | 0.0 | 42.86 | 30.00 | (see domestic) | | 48.15 | 68.67 |
| 2013 | 2350 | 1650 | (see domestic) | | 0.0 | 42.42 | | | | 17.50 | 17.86 |
| 2014 | 2700 | 1900 | | | 0.0 | 50.00 | | | | 14.89 | 9.09 |
| 2015 | 3100 | 2150 | | | 0.0 | 58.97 | | | | 14.81 | 8.33 |
| 2016 | 3500 | 2400 | | | 0.0 | 62.79 | | | | 12.90 | 10.26 |
| 2017 | 3750 | 2580 | | | 0.0 | 53.06 | | | | 7.14 | 13.95 |
| 2018 | 3980 | 2760 | | | 0.0 | 50.19 | | | | 6.13 | 8.16 |
| 2019 | 4180 | 2920 | | | 0.0 | 43.15 | | | | 5.03 | 10.19 |
| 2020 | 4420 | 3070 | | | 0.0 | 43.97 | | | | 5.74 | 5.14 |
| total 1 | total 1 | total 1 | | | total 1 | total 1 | total 1 | | | total 1 | total 1 |

*FDI: Foreign Direct Investment, dom domestic del changes R1/R4 region 1 / region 4*

**Table A13a Wages by income quintiles (2008-2018, based on VHLSS 2018, 392)**

| CẢ NƯỚC/ WHOLE COUNTRY | Chung/ Total | Nhóm 1/ Quint 1 | Nhóm / Quint. 2 | Nhóm 3/ Quint. 3 | Nhóm 4/ Quint 4 | Nhóm 5/ Quint 5 | Disparity Q5:Q1 |
|---|---|---|---|---|---|---|---|
| 2008 | 995.2 | 275.0 | 477.2 | 699.9 | 1067.4 | 2458.2 | 8.9 |
| 2010 | 1387.1 | 369.4 | 668.8 | 1000.4 | 1490.1 | 3410.2 | 9.2 |
| 2012 | 1999.8 | 511.6 | 984.1 | 1499.6 | 2222.5 | 4784.5 | 9.4 |
| 2014 | 2637.3 | 659.8 | 1313.9 | 1971.5 | 2830.3 | 6412.8 | 9.7 |
| 2016 | 3097.6 | 770.6 | 1516.5 | 2300.9 | 3355.7 | 7547.3 | 9.8 |
| 2018 | 3873.8 | 922.9 | 1907.2 | 2929.8 | 4292.6 | 9318.3 | 10.1 |
| urban | | | | | | | |
| 2008 | 1605.2 | 453.2 | 867.8 | 1229.9 | 1722.2 | 3752.4 | 8.3 |
| 2010 | 2129.5 | 632.6 | 1153.5 | 1611.5 | 2268.4 | 4983.4 | 7.9 |
| 2012 | 2989.1 | 951.5 | 1672.2 | 2332.9 | 3198.3 | 6794.4 | 7.1 |
| 2014 | 3964.5 | 1267.0 | 2178.5 | 2922.4 | 4033.7 | 9421.0 | 7.4 |
| 2016 | 4551.3 | 1452.0 | 2511.1 | 3436.1 | 4742.9 | 10622.6 | 7.3 |
| 2018 | 5624.1 | 1801.6 | 3163.6 | 4366.1 | 6235.4 | 12555.2 | 7.0 |
| Nông / rural | | | | | | | |
| 2008 | 762.2 | 251.2 | 415.4 | 583.1 | 828.7 | | |
| 2010 | 1070.4 | 330.0 | 568.4 | 820.5 | 1174.6 | 2461.8 | 7.5 |
| 2012 | 1579.4 | 450.2 | 817.8 | 1227.7 | 1788.9 | 3614.8 | 8.0 |
| 2014 | 2038.4 | 564.9 | 1082.0 | 1611.4 | 2295.0 | 4640.9 | 8.2 |
| 2016 | 2422.7 | 667.3 | 1233.3 | 1865.4 | 2705.5 | 5643.9 | 8.5 |
| 2018 | 2986.5 | 796.4 | 1487.5 | 2341.9 | 3379.5 | 6935.0 | 8. |

**Table A13b Wages/incomes changes for different skill levels 2018 – 2020**

| | 2018/ Q2 | 2019/ Q1 | 2019/ Q2 | 2019/ Q3 | 2019/ Q4 | 2020/ Q1 | 2020/ Q2 | 2020/ Q3 | 2020/ Q4 | 2021/ Q1 |
|---|---|---|---|---|---|---|---|---|---|---|
| national average | 5.88 | 6.82 | 6.46 | 6.58 | 6.71 | 7.34 | 6.36 | 6.5 | 6.79 | 7.14 |
| Male | 6.18 | 6.87 | 6.6 | 6.75 | 7.07 | 7.68 | 6.68 | 6.8 | 7.05 | 7.56 |
| Female | 5.47 | 6.09 | 5.8 | 5.91 | 6.25 | 6.9 | 5.93 | 6.1 | 6.45 | 6.61 |
| Gender gap (in pc) | 11.5 | 11.4 | 12.1 | 12.4 | 11.6 | 10.2 | 11.2 | 10.3 | 8.5 | 13.6 |
| Urban | 6.85 | 7.29 | 6.89 | 7.05 | 7.83 | 8.67 | 7.28 | 7.3 | 7.51 | 8.18 |
| Rural | 5.18 | 5.74 | 5.59 | 5.68 | 5.87 | 6.38 | 5.68 | 5.9 | 6.3 | 6.35 |
| Rural : urban gap * | 24.4 | 21.3 | 18.9 | 19.4 | 25.0 | 26.4 | 22.0 | 19.2 | 16.1 | 22.4 |
| **Skill levels **** | | | | | | | | | | |
| no skill | 5.04 | 4.26 | 5.33 | 5.42 | 5.74 | 6.2 | 5.37 | 5.7 | 6.16 | 6.16 |
| elementary-level | 6.58 | 8.02 | 7.28 | 7.1 | 7.74 | 8.64 | 7.2 | 7.5 | 7.67 | 8.05 |
| intermediate level | 6.08 | 6.52 | 6.46 | 6.61 | 6.9 | 7.68 | 6.6 | 6.7 | 7.09 | 7.17 |
| college | 6.35 | 6.84 | 6.67 | 6.75 | 7.24 | 8 | 6.81 | 7 | 7.3 | 7.64 |
| university level | 8.27 | 8.93 | 8.32 | 8.5 | 9.28 | 8.5 | 9.28 | 8.8 | 8.34 | 9.72 |
| educational gap | 64.1 | 109.6 | 56.1 | 56.8 | 61.7 | 37.1 | 72.8 | 54.4 | 35.4 | 57.9 |
| **Changes** | | | changes to previous quarter (in percentages) | | | | | | | |
| national average | - | 15.99 | -5.28 | 1.86 | 1.98 | 9.39 | -13.35 | 2.20 | 4.46 | |
| Male | - | 11.17 | -3.93 | 2.27 | 4.74 | 8.63 | -13.02 | 1.80 | 3.68 | |
| Female | - | 11.33 | -4.76 | 1.90 | 5.75 | 10.40 | -14.06 | 2.87 | 5.74 | |
| Urban | - | 6.42 | -5.49 | 2.32 | 11.06 | 10.73 | -16.03 | 0.27 | 2.88 | |
| Rural | - | 10.81 | -2.61 | 1.61 | 3.35 | 8.69 | -10.97 | 3.87 | 6.78 | |
| no skill | - | -15.48 | 25.12 | 1.69 | 5.90 | 8.01 | -13.39 | 6.15 | 8.07 | |
| elementary-level | - | 21.88 | -9.23 | -2.47 | 9.01 | 11.63 | -16.67 | 4.17 | 2.27 | |
| intermediate level | - | 7.24 | -0.92 | 2.32 | 4.39 | 11.30 | -14.06 | 1.52 | 5.82 | |
| College | - | 7.72 | -2.49 | 1.20 | 7.26 | 10.50 | -14.88 | 2.79 | 4.29 | |
| university level | - | 7.98 | -6.83 | 2.16 | 9.18 | -8.41 | 9.18 | -5.17 | -5.23 | |

*. * the rural : urban gap does not take into consideration higher living costs in urban areas*
*** skill levels for wages / salaries have not been included in the earlier LMUs*
*Compiled & calculated from GVN/MOLISA and GSO 2018, 2019, 2020, 2021 (Labour Market up-dates)*

**Table A14 Age and gender composition of labour force in manufacturing and garment (LFS 2019)**

| age groups | all manuf. (men) | garment (men) | other man-ufacturing (men) | all manu-facturing (women) | garment (women) | other manufact-turing (w.) | pc/w. garment | per centwm/ all garm. |
|---|---|---|---|---|---|---|---|---|
| 15 –19 | 258,308 | 49,197 | 209,111 | 288,081 | 193,092 | 94,989 | 32.97 | 79.69 |
| 20 – 24 | 709,611 | 103,616 | 605,995 | 805,193 | 524,967 | 280,226 | 34.80 | 83.52 |
| 25 – 29 | 954,083 | 132,983 | 821,100 | 1,117,355 | 722,483 | 394,872 | 35.34 | 84.45 |
| 30 – 34 | 921,119 | 107,596 | 813,523 | 1,136,741 | 734,450 | 402,291 | 35.39 | 87.22 |
| 35 – 39 | 730,610 | 79,049 | 651,561 | 957,661 | 600,428 | 357,233 | 37.30 | 88.37 |
| 40 – 44 | 506,371 | 50,417 | 455,954 | 707,566 | 445,638 | 261,928 | 37.02 | 89.84 |
| 45 – 49 | 438,845 | 36,486 | 402,359 | 499,309 | 345,559 | 153,750 | 30.79 | 90.45 |
| 50 – 54 | 318,724 | 30,772 | 287,952 | 290,394 | 75,768 | 214,626 | 26.09 | 71.12 |
| 55 – 59 | 204,322 | 15,196 | 189,126 | 136,734 | 24,658 | 112,076 | 18.03 | 61.87 |
| 60 – 64 | 95,924 | 7,732 | 88,192 | 82,543 | 15,357 | 67,186 | 18.60 | 66.51 |
| 65+ | 58,116 | 8,526 | 49,590 | 70,031 | 11,088 | 58,943 | 15.83 | 56.53 |
| Total | 5,196,032 | 621,570 | 4,574,462 | 6,091,607 | 2,072,160 | 4,019,447 | 34.02 | 76.93 |

*Source: calculated from LFS 2019 (GVN/GSO 2019a)*

**Table A15 Changes of women labour force in garment manufacturing (2018 – 2020/Q2)**

| age groups (women | garment (2019) | garment (2018) | added LF (2018-19) | per centadded 2018-19 * | garment (2020/Q2) | added LF 2019 -2020/ Q2 |
|---|---|---|---|---|---|---|
| 15 – 19 | 94,989 | 102,768 | (minus) | | 45,841 | -49,148 |
| 20 – 24 | 280,226 | 261,484 | 18,742 | 7.17 | 294,738 | 14,512 |
| 25 – 29 | 394,872 | 316,731 | 78,141 | 24.67 | 354,367 | -40,505 |
| 30 – 34 | 402,291 | 348,620 | 53,671 | 15.40 | 457,144 | 54,853 |
| 35 – 39 | 357,233 | 283,893 | 73,340 | 25.83 | 415,556 | 58,323 |
| 40 – 44 | 261,928 | 249,373 | 12,555 | 5.03 | 312,871 | 50,943 |
| 45 – 49 | 153,750 | 139,535 | 14,215 | 10.19 | 165,419 | 11,669 |
| 50 – 54 | 75,768 | 62,790 | 12,978 | 20.67 | 73,383 | -2,385 |
| 55 – 59 | 24,658 | 19,581 | 5,077 | 25.93 | 28,993 | 4,335 |
| 60 – 64 | 15,357 | 17,745 | (minus) | 0.00 | 19,891 | 4,534 |
| 65+ | 11,088 | 6,412 | 4,676 | 72.93 | 11,603 | 515 |
| Total | 2,072,160 | 1,808,932 | 263,228 | 14.55 | 2,179,806 | 107,646 |

*. * approximately 15-20 per centof those added can be attributed to demographic changes, being classified in a higher age group due to ageing*

*Sources: calculated from LFS 2018 - 2020/Q2 (GVN/GSO 2019 and 2020b)*

**Table A16 Underemployment and working hours among women labour force in garment in 2020/Q2**

| age groups (women) | <=25 | 25-35 | 35-45 | > 45 | Total | pc/w u25 | pc/w 25-34 | pc/w 35-45 | pc/ w >45 |
|---|---|---|---|---|---|---|---|---|---|
| 15 – 19 | 4,031 | 4,136 | 10,192 | 27,482 | 45,841 | 8.8 | 9.0 | 22.2 | 59.9 |
| 20 – 24 | 30,664 | 31,417 | 59,123 | 173,534 | 294,738 | 10.40 | 10.7 | 20.1 | 58.9 |
| 25 – 29 | 27,748 | 30,401 | 63,244 | 232,974 | 354,367 | 7.8 | 8.6 | 17.9 | 65.7 |
| 30 – 34 | 34,484 | 54,297 | 74,939 | 293,424 | 457,144 | 7.5 | 11.9 | 16.4 | 64.2 |
| 35 – 39 | 34,052 | 52,346 | 73,435 | 255,722 | 415,556 | 8.29 | 12.6 | 17.7 | 61.5 |
| 40 – 44 | 25,017 | 41,472 | 77,436 | 168,945 | 312,871 | 8.0 | 13.3 | 24.7 | 54.0 |
| 45 – 49 | 13,152 | 17,071 | 40,409 | 94,787 | 165,419 | 7.9 | 10.3 | 24.4 | 57.3 |
| 50 – 54 | 7,533 | 13,980 | 18,029 | 33,841 | 73,383 | 10.3 | 19.1 | 24.6 | 46.1 |
| 55 – 59 | 2,717 | 6,388 | 10,693 | 9,195 | 28,993 | 9.4 | 22.0 | 36.9 | 31.7 |
| 60 – 64 | 6,748 | 6,973 | 2,263 | 3,907 | 19,891 | 33.9 | 35.1 | 11.4 | 19.6 |
| 65+ | 2,303 | 2,078 | 4,436 | 2,786 | 11,603 | 19.8 | 17.9 | 38.2 | 24.0 |
| Total | 188,450 | 260,559 | 434,200 | 1,296,596 | 2,179,805 | 8.6 | 11.9 | 19.9 | 59.5 |

*Sources: calculated from LFS 2020/Q2 (GVN/GSO 2020b)*

**Table A17 Impact of COVID-19 on incomes of workers (from Do Quynh Chi 2020 and ILO 2020i)**

| | garment | Foot ware | electronics | Tourism | Sea food processing | Wood processing |
|---|---|---|---|---|---|---|
| Sources | FES study | FES study | FES study | ILO study | ILO study | ILO study |
| no incomes | 5.7 | 5.6 | 13.6 | 60 | 11 | 8 |
| < minimum wages | 1.9 | 0.0 | 3.4 | 21 | 3 | 2 |
| at minimum wages | 0.0 | 13.0 | 0.0 | 5 | 8 | 15 |
| reduced by > 50 pc | 20.8 | 1.9 | 10.2 | 6 | 15 | 30 |
| reduced by 20-50 pc | 49.1 | 48.1 | 42.4 | 8 | 8 | 25 |
| reduced by < 20 pc | 19.8 | 27.8 | 11.9 | 0 | 55 | 15 |
| Unchanged | 3.8 | 3.7 | 18.6 | 0 | | 5 |

**Table A18 (Sub-)National poverty rates (1993 - 2018)**

| sub-national regions | 1993 | 1998 | 2002 | 2004 | 2010 | 2012 | 2014 | 2016 | 2018 |
|---|---|---|---|---|---|---|---|---|---|
| Northeast * | 86.1 | 62 | 38.4 | 29.4 | 29.4 | 23.8 | 18.4 | 13.8 | 18.4 |
| N/ Northwest * | 81.1 | 73.4 | 68 | 58.6 | * | * | * | * | * |
| Red River Delta | 62.7 | 29.3 | 22.4 | 12.1 | 8.3 | 6 | 4 | 2.4 | 1.9 |
| North Central Coast ** | 74.5 | 48.1 | 43.9 | 31.9 | 20.4 | 16.1 | 11.8 | 8 | 11.6 |
| South Central Coast ** | 47.2 | 34.5 | 25.2 | 19 | ** | ** | ** | ** | ** |
| Central Highlands | 70 | 52.4 | 51.8 | 33.1 | 22.2 | 17.8 | 13.8 | 9.1 | 13.9 |
| Southeast | 37 | 12.2 | 10.6 | 5.4 | 2.3 | 1.3 | 1 | 0.6 | 0.6 |
| Mekong Delta | 47.1 | 36.9 | 23.4 | 15.9 | 12.6 | 10.1 | 7.9 | 5.2 | 5.8 |
| Vietnam (national) | 58.1 | 37.4 | 28.9 | 19.5 | 14.2 | 11.1 | 8.4 | 5.8 | 6.8 |

*.* / ** from 2010 onwards these two regions have statistically been merged*
*Compiled from GVN/GSO 2017, 21 and 2019, 864ff (Viet Nam Household Living Standard Surveys)*

**Table A19 Informality and social insurance (SI) coverage in different sectors (for 2018), ranked on (1) ***

| | (1) wages/ with SI * | (2) wages/ no SI * | (3) self employed * | (4) TOTAL ** | pc (1) | pc (2) | per cent(3) |
|---|---|---|---|---|---|---|---|
| Agriculture | 162,000 | 2,214,000 | 1,906,000 | 4,282,000 | 0.3 | 4.1 | 35.3 |
| Hotels+catering | 216,000 | 648,000 | 1,512,000 | 2,322,000 | 0.4 | 1.2 | 2.8 |
| Construction | 270,000 | 3,780,000 | 216,000 | 4,320,000 | 0.5 | 7 | 0.4 |
| Logistics | 378,000 | 594,000 | 702,000 | 1,620,000 | 0.7 | 1.1 | 1.3 |
| other+services | 432,000 | 810,000 | 648,000 | 1,890,000 | 0.8 | 1.5 | 1.2 |
| ICT + Finance +Real Est | 648,000 | 162,000 | 270,000 | 1,080,000 | 1.2 | 0.3 | 0.5 |
| Electronics | 702,000 | 162,000 | 0 | 810,000 | 1.3 | 0.3 | 0 |
| Wholesale+ | 810,000 | 1,512,000 | 4,806,000 | 7,128,000 | 1.5 | 2.8 | 8.9 |
| Public+admin+secure | 1,404,000 | 432,000 | 54,000 | 1,890,000 | 2.6 | 0.8 | 0.1 |
| Other | 1,836,000 | 1,944,000 | 1,566,000 | 5,400,000 | 3.4 | 3.6 | 2.9 |
| Health+education | 1,998,000 | 432,000 | 108,000 | 2,538,000 | 3.7 | 0.8 | 0.2 |
| Textile+garments | 2,430,000 | 756,000 | 432,000 | 3,564,000 | 4.5 | 1.4 | 0.8 |
| Vietnam (total LF) | 11,286,000 | 13,446,000 | 17,314,000 | 54,000,000 | 20.9 | 24.9 | 54.4 |

** sources: all calculations are based on World Bank 2020d, 23 (as percentages, see last 3 columns)*
*. ** all calculations are based on assuming a total labour force (LF) of 54 million persons*

**Table A20 Age and gender composition for social insurances among labour force (based on LFS 2020)**

| age groups | social ins. (men) | no SI. (men) | all men | soc.ins. (women) | no SI. (women) | all women | per centSI (men) | per centSI (women |
|---|---|---|---|---|---|---|---|---|
| 15 – 19 | 155,752 | 1,020,592 | 1,176,344 | 193,073 | 715,698 | 908,771 | 13.2 | 21.2 |
| 20 – 24 | 724,766 | 1,680,934 | 2,405,700 | 921,826 | 1,125,125 | 2,046,951 | 30.1 | 45.0 |
| 25 – 29 | 1,278,774 | 2,137,584 | 3,416,358 | 1,531,385 | 1,470,737 | 3,002,122 | 37.4 | 51.0 |
| 30 – 34 | 1,296,992 | 2,518,896 | 3,815,888 | 1,657,104 | 1,844,510 | 3,501,614 | 34.0 | 47.3 |
| 35 – 39 | 1,207,032 | 2,656,002 | 3,863,034 | 1,511,123 | 2,057,351 | 3,568,474 | 31.2 | 42.3 |
| 40 – 44 | 854,817 | 2,588,519 | 3,443,336 | 969,343 | 2,200,556 | 3,169,899 | 24.8 | 30.6 |
| 45 – 49 | 637,053 | 2,552,328 | 3,189,381 | 544,775 | 2,274,709 | 2,819,484 | 20.0 | 19.3 |
| 50 – 54 | 422,281 | 2,360,036 | 2,782,317 | 314,081 | 2,124,050 | 2,438,131 | 15.2 | 12.9 |
| 55 – 59 | 288,395 | 1,997,237 | 2,285,632 | 50,219 | 1,597,632 | 1,647,851 | 12.6 | 3.0 |
| 60 – 64 | 60,070 | 1,110,082 | 1,170,152 | 14,879 | 1,199,318 | 1,214,197 | 5.1 | 1.2 |
| 65 – 69 | 12,504 | 700,041 | 712,545 | 4254 | 680,116 | 684,370 | 1.8 | 0.6 |
| 70 – 74 | 5,163 | 282,753 | 287,916 | 294 | 294,502 | 294,796 | 1.8 | 0.1 |
| (sub-) totals | 6,943,599 | 21,605,004 | 28,548,603 | 7,712,356 | 17,584,304 | 25,296,660 | 24.3 | 30.5 |

*SI social insurance*

**Table A21 Applications for unemployment benefits (UE) and other government support (via MOLISA)**

| | 2018/ Q4 | 2019/ Q1 | 2019/ Q2 | 2019/ Q3 | 2019/ Q4 | 2020/ Q1 | 2020/ Q2 | 2020/ Q3 | 2020/ Q4 |
|---|---|---|---|---|---|---|---|---|---|
| applicants for UE benefits | 166,119 | 141,432 | 287,314 | 243,058 | 177,895 | 167,099 | 399,556 | 326,800 | 226,700 |
| positive decision for UE allowance | 182,804 | 120,666 | 264,389 | 255,780 | 195,087 | 132,840 | 375,805 | 331,100 | 248,200 |
| application for UEB transferred | 1,265 | 1,105 | 1,368 | 1,752 | 1,250 | 886 | | | |
| connsulatations/ recommend-ations | 346,965 | 279,784 | 472,229 | 498,366 | 407,396 | 332,091 | 604,127 | 683,500 | 591,600 |
| Recommend-ation | 40,552 | 32,425 | 57,284 | 57,987 | 40,957 | 26,387 | | 77,600 | 70,700 |
| Training | (na.) | 7,798 | 11,388 | 12,861 | 9,911 | 6,296 | 6,875 | 6,500 | 6,800 |

*Source: GVN/MOLISA and GSO (2019 and 2020): Labour Market up-dates (for earlier years see LMUs)*

**Table A22 Target groups and amounts allocated for COVID-19 support schemes (via MOLISA)**

| | amounts | Listed bene-ficiaries | Actual be-ne-ficiaries | Amounts allocated (1) | Amounts disbursed (2) | per cent 2 / 1 |
|---|---|---|---|---|---|---|
| Total | | 16,402,445 | 11,353,168 | 19,681,662 | 11,481,151 | 58.33 |
| Meritorious/revol. persons | 500,000 VND | 1,102,660 | 990,291 | 1,752,845 | 1,485,030 | 84.72 |
| Poor/near poor | 250,000 VND/h.hold | 8,206,822 | 7,279,900 | 6,155,113 | 5,513,984 | 89.58 |
| Social protection beneficiaries | 500,000 VND/ person | 3,064,028 | 2,845,385 | 4,596,587 | 4,239,576 | 92.23 |
| Workers with suspended work contracts | 1.8 million VND/pers. | 777,166 | 18,627 | 1,398,898 | 23,337 | 1.67 |
| Workers without contracts | 1. million VND/pers. | 2,601,654 | 196,797 | 4,246,977 | 196,815 | 4.63 |
| Workers with contracts but not eligible for UEB | 1. million VND/pers. | 356,423 | 14,295 | 356,423 | 14,536 | 4.08 |
| Business h.holds | | 172,201 | 7,873 | 182,801 | 7,873 | 4.31 |

*Source: GIZ and GVN/MOLISA 2020, 19/20*

**Table A23 Educational attainments for age groups (aged 20-24) and social disparities (2008-18)**

| Age group 20-24 for different years | (1) never | (2) no certifi-cate | (3) primary | (4) lower second. | total (1-4) | (5) higher second. | (6) vocat ional * | (7) college/ univ. | (8) other |
|---|---|---|---|---|---|---|---|---|---|
| 2008 | 3.3 | 5.4 | 17.9 | 20.3 | 46.9 | 36.4 | 7 | 5.1 | 8.2 |
| 2010 | 2.9 | 5.3 | 15.2 | 22 | 45.4 | 37.7 | 9.8 | 6 | 7.5 |
| 2012 | 2.4 | 3.9 | 13.5 | 21.8 | 41.6 | 38 | 9.1 | 9.3 | 7.9 |
| 2014 | 1.8 | 3.1 | 12.9 | 21.1 | 38.9 | 37.7 | 8 | 13.1 | 7.5 |
| 2016 | 1.9 | 2.9 | 12.5 | 21.3 | 38.6 | 39.2 | 6.2 | 14.2 | 6.3 |
| 2018 | 1.9 | 2.2 | 11.9 | 20 | 36 | 43.7 | 3.5 | 14.6 | 2.2 |
| by gender | | | | | | | | | |
| female (2008) | 10.4 | 15.7 | 22.9 | 26.7 | 75.7 | 13 | 3.5 | 4.5 | 3.3 |
| female (2018) | 6.8 | 13.8 | 20.4 | 27.4 | 68.4 | 8.4 | 2.2 | 10.8 | 10.2 |
| male (2008) | Figure 4.4 | 11.2 | 23.3 | 29.3 | 68.2 | 15.2 | 6.5 | 5.7 | 4.4 |
| male (2018) | 3.4 | 9.4 | 20.0 | 29.2 | 62 | 17.4 | 7.4 | 10.7 | 2.5 |
| by year of birth ** | for older cohorts (in 2018), calculated from different age cohorts | | | | | | | | |
| 1965-69 | 4.8 | 12.8 | 23.9 | 32 | 73.5 | 13.5 | 6.9 | 6.7 | 0 |
| 1970-74 | 5.9 | 11.8 | 23.6 | 30.1 | 71.4 | 14.6 | 3.9 | 8 | 2.1 |
| 1975-79 | 6 | 12 | 28.6 | 26.2 | 72.8 | 9.3 | 4.7 | 10.9 | 2.3 |
| 1980-84 | 5.6 | 10.2 | 24.5 | 21 | 61.3 | 13.6 | 6.5 | 15.4 | 3.2 |
| 1985-89 | 3.7 | 6.2 | 18.3 | 21.9 | 50.1 | 6.9 | 6.9 | 19 | 4 |
| 1990-94 | 2.4 | 3.2 | 12.4 | 23.5 | 41.5 | 20.5 | 6.5 | 26.7 | 4.8 |
| 1995-99 | 1.9 | 2.2 | 11.9 | 20 | 36 | 43.7 | 3.5 | 14.6 | 2.2 |
| by social parameters | Income quintiles (Q1 = lowest group) *** | | | | | | | | |
| Q1 *** (2008) | 17.6 | 19.1 | 26.2 | 26.9 | 89.8 | 7.9 | 1.6 | 0.3 | 0.4 |
| Q1 ***(2018) | 15.4 | 19.2 | 25 | 28.6 | 88.2 | 8.8 | 1.2 | 1 | 0.8 |
| national average (2008) | 7.5 | 13.5 | 23.1 | 27.9 | 72 | 14.1 | 5.3 | 5.1 | 3.5 |
| national average (2018) | 5.2 | 11.7 | 20.2 | 28.3 | 65.4 | 16.3 | 4.1 | 10.8 | 3.4 |

*. * this variable include three column from the VHLLS (Primary vocational, Secondary apprentice and College vocational)*
*** converted from age groups*
**** Q1: lowest income quintile (ie. one group among five groups of equal size)*

*compiled (& calculated) from GVN/GSO 2019, 130 - 145*