



# Socio-Economic Impact Assessment of COVID-19 in Thailand

October 2020





# A Message of Appreciation from NESDC

On behalf of the Office of the National Economic and Social Development Council (NESDC), I would like to extend my appreciation to the United Nations Development Programme (UNDP) and the United Nations Children's Fund (UNICEF) for putting together the Consolidated Socio-Economic Impact Assessment of COVID-19 in Thailand. Drawing on findings from several sources, this timely assessment contributes to our knowledge of the impacts of the pandemic on Thailand and provides a broad range of policy recommendations for the country's successful recovery and post-COVID development. It is particularly reassuring to note that the recommended actions and ways forward identified in the assessment are in alignment with the NESDC's COVID-19 Contingency Plan under the National Strategy 2021-2022 which will guide country-led efforts to combat the pandemic and mitigate its impacts on the Thai society and economy over the next two years. I trust that, together with the contingency plan, this assessment provides a basis for relevant stakeholders to shape appropriate policy responses which will allow our economy to bounce back stronger and more resilient while keeping Thailand on the path towards achieving the Sustainable Development Goals.



**Danucha Pichayanun**

Secretary-General

The National Economic and Social Development Council

# Foreword

The COVID-19 pandemic has severely affected the lives and well-being of all in Thailand. The country's response to the pandemic and ability to curb infections has been a remarkable success story, thanks to the Royal Thai Government's rapid and comprehensive delivery of public health measures and ambitious socio-economic stimulus packages. Nevertheless, because of the pandemic, growth and employment have been severely impacted and the country's progress in achieving the Sustainable Development Goals (SDGs) has been undermined. As evidenced in this report, the most vulnerable groups are bearing the brunt of the crisis.

The Socio-Economic Impact Assessment of COVID-19 in Thailand was commissioned by the UN Country Team in Thailand and led by UNDP and UNICEF, in partnership with the Office of the National Economic and Social Development Council (NESDC) and the Asian Development Bank. It builds on a number of studies, surveys and assessments conducted by the UN in Thailand and forms the core pillar of the UN's Socio-economic Response Plan to COVID-19 in the country. It aims to inform national response efforts through a comprehensive whole-of-society and whole-of-government approach.

The pandemic presents unprecedented challenges, but also opportunities to build forward better. We are at an important juncture, where we should review the latest evidence and rethink the medium and long-term course of development for a resilient recovery aligned with Thailand's commitment toward the SDGs and leaving no one behind. This report examines the severe socio-economic impact of the pandemic, analyses the implications for the SDGs, and outlines key policy directions to guide the recovery process.

The UN is committed to continuing to work with the Royal Thai Government and other development partners to support Thailand on its path towards a strong, resilient recovery and sustainable development. Our collective efforts are needed now more than ever to ensure that no one is left behind in the response to this crisis.



**Gita Sabharwal**  
UN Resident Coordinator in Thailand

# Acknowledgement

If Thailand was the first country outside of China to record a case of COVID-19, it is also considered today as one of the most successful country in terms of the overall response to the pandemic. Nevertheless, its social and economic impact is deep and profound, especially on the most vulnerable.

What we are learning from the pandemic, from its negative impact but also from the positive forces that were mobilized to meet this unprecedented challenge, can induce an enduring, structural change for the better. This assessment, conducted as the crisis was evolving, aims to generate rapid yet comprehensive evidence on its socio-economic impact in Thailand and concrete recommendations for the country to not just recover but build forward better. This report shows that in addition to continued public health and economic measures in the short term, Thailand must strategically invest in technology, innovation, expansion of social protection and upgrading social services in the long term to emerge as a more equitable and resilient country.

Producing this report was truly a collective and very collaborative endeavour. It was accomplished through the collaboration between the Office of the National Economic and Social Development Council (NESDC) and the UN Country Team in Thailand, with technical contributions from various Ministries, the Thailand Development Research Institute (TDRI), and the Asian Development Bank (ADB).

The report consolidates findings from two socio-economic impact assessments commissioned by the UN and conducted by the Economist Intelligence Unit and Oxford Policy Management, as well as from studies conducted by the FAO, ILO, UNDP, UNESCO, UNICEF, UNIDO, UN Women and the World Bank. A detailed list of references is available in the Annex. The support of all stakeholders was critical in consolidating the studies' findings through consultations and key informant interviews. Our gratitude goes to Dr. Silaporn Buasai for developing the report as the lead national consultant and Nick Maddock for his technical inputs and editorial support.

The report was launched on Sept. 23, 2020 in a joint meeting held by the NESDC and the UN Country Team in Thailand. Its discussion informed experts and agencies on the socio-economic impact of the pandemic and actionable recommendations for keeping the SDGs on track in Thailand.

UNDP and UNICEF co-led this report as a joint UN effort in Thailand. We wish to convey our deepest gratitude to all stakeholders, transforming the unprecedented challenges of this crisis into an opportunity for focusing our collective efforts for a sustainable future for all.



**Renaud Meyer**  
Resident Representative  
UNDP Thailand



**Severine Leonardi**  
Officer-in-Charge  
UNICEF-Thailand





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## Chapter 1

# Introduction

Thailand faces massive shocks from the pandemic. Despite marked success in controlling the outbreak and keeping rates of infection and mortality low, severe economic and social consequences are apparent. The economy is contracting and, with international tourism almost entirely stopped, employment has been hard hit. The pandemic is affecting the poorest and most vulnerable the hardest. Among those affected are informal workers, which account for more than half of the labour force, and vulnerable groups such as people with disabilities and chronic illness. They have poorer access to job opportunities and face difficulties in getting government support.

This socioeconomic assessment of the effects of COVID 19 in Thailand analyses economic and social impact, as well as progress towards the Sustainable Development Goals. Prepared by the United Nations Development Programme (UNDP) and the United Nations Children's Fund (UNICEF), and working with the National Economic and Social Development Council it looks at the implications of the pandemic on the macroeconomy, poverty, education, health, social protection, protection against violence, exploitation and abuse.

The assessment consolidates findings from an analysis on the economic impact of the pandemic by the Economist Intelligence Unit and a report on the social impact of the crisis by Oxford Policy Management. It also incorporates the results of rapid assessments and sectoral analyses by UN agencies and benefits from the advisory and technical support from the UN system in Thailand, the Asian Development Bank, and the World Bank.

Chapter 1 provides an overview of the pandemic in Thailand and documents the government's response. Chapter 2 assesses the social and economic impacts. Chapter 3 analyses the pandemic's implications for progress towards the Sustainable Development Goals. Chapter 4 proposes policy options to address the economic and social impact of the pandemic, as well as short, medium, and long-term measures for rehabilitation and recovery aligned with Thailand's commitment towards the Sustainable Development Goals.



## Objectives

The objectives of this report are (a) to assess the impacts of the pandemic on Thailand's economy and progress in achieving the Sustainable Development Goals; and (b) to recommend actions and policy options to rebuild the economy from the perspective of the Sustainable Development Goals.

## Methodology

The report draws on findings from two studies commissioned jointly by the United Nations conducted by the Economist Intelligence Unit and Oxford Policy Management completed in July 2020, together with studies by individual agencies. Contributory reports from UN agencies include reports by the United Nations Food and Agriculture Organisation (FAO), the International Labour Organisation (ILO), the United Nations Development Programme (UNDP), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the United Nations Children's Fund (UNICEF), the United Nations Industrial Development Organisation (UNIDO), the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) and the World Bank. A list of reference is in annex E. Impact Pathway analysis<sup>1</sup> was used as a core methodology.

## Overview of the Pandemic

Thailand was the first country after China to report a confirmed COVID case on 12th January 2020. After a peak of transmission (188 cases in a day) in March 2020, infections were contained after strong community-based contact tracing and quarantine. The state of emergency announced on the 26th March 2020 and the partial lockdown in and outside Bangkok further contained the virus. But, more cases outside Bangkok have been reported following movement to the countryside.<sup>2</sup>

In June 2020, the number of confirmed cases grew by less than 100 (from 3,084 to 3,180), and percentage of deaths per confirmed cases was less than 2%. There were 58 deaths by early June 2020, with none since then. Although the number of tests for COVID-19 was low compared to its neighbouring countries, once confirmed, the patient would receive good treatment so keeping the death toll low<sup>3</sup> Since June 2020, additional confirmed cases all came from abroad.<sup>4</sup>

<sup>1</sup> Impact Pathway analysis is a logic model describing causal pathways showing the linkages between the sequence of steps in getting from activities to impact. See John Mayne, Useful Theory of Change Models, Canadian Journal of Program Evaluation, Fall 2015

<sup>2</sup> OPM chapter1, 2020

<sup>3</sup> National Research Office and Department of Disease Control, 2020

<sup>4</sup> Medical Innovation Operation Center, National Research Office, 2020

**Table 1: Direct Impact of COVID-19 in Thailand, as of July 2020<sup>5</sup>**

<b>COVID-19 identified cases and recorded deaths</b>	3,180 cases and 58 deaths.
<b>Transmission rate</b>	The number of detected new cases has decreased over time. 50 provinces had no new cases reported in the past 28 days. Only 18 provinces had ongoing cases, reported in the previous 28 days.
<b>COVID-19 testing</b>	Over 600,000 samples have been tested for COVID-19. This is equivalent to 8,596 tests per million people. The policy of the Ministry of Public Health is to increase testing among at-risk and vulnerable groups.

## Royal Thai Government Response

The Royal Thai Government was quick in responding to the spread of the pandemic. The objective was to save lives. Public health measures were imposed to control the situation, followed by measures to ameliorate economic hardship.

**Table 2: Public Health Measures in response to COVID-19 in Thailand until July 2020<sup>6</sup>**

<b>Public health measures</b>	<b>Details</b>	<b>Progress</b>
<b>State of emergency</b>	<ul style="list-style-type: none"> <li>From 26 March – 31 May 2020. Foreigners banned from entering the country.</li> <li>14-day quarantine for all travellers entering Thailand and nightly curfew.</li> <li>Movement between provinces to be avoided; restrictions on all international commercial flights; ban on alcohol sales;</li> <li>restriction of mass gatherings; work from home encouraged.</li> </ul>	<ul style="list-style-type: none"> <li>Extended until 31st July 2020</li> </ul>
<b>Social distancing</b>	<ul style="list-style-type: none"> <li>Closure of public venues by Bangkok Metropolitan Administration from 29th April 2020</li> </ul>	<ul style="list-style-type: none"> <li>There were four stages in relaxing the lockdown starting in May by opening low-risk businesses.</li> <li>Hand hygiene, wearing face masks and physical distancing.</li> </ul>
<b>Schools closure</b>	<ul style="list-style-type: none"> <li>All schools, except for international private schools</li> </ul>	<ul style="list-style-type: none"> <li>Preparation phase<sup>7</sup> (April to May 2020), experiment phase (May to June 2020); and start of the new 2020 academic year shifted to July 2020</li> </ul>

<sup>5</sup> OPM, chapter 1, 2020

<sup>6</sup> Ibid.

<sup>7</sup> Preparation phase includes preparing new digital television programmes for pre-primary, primary, and lower secondary students, supplemented by online learning materials and teacher interaction through the OBEC platforms for upper secondary students.

Economic impacts have been severe, with a series of measures put in place to mitigate the impacts.

**Table 3: Stimulus Packages Implemented in Thailand until July 2020<sup>8</sup>**

Stimulus package	Details
<b>Phased stimulus package</b>	<b>Phase 1</b> (4th March 2020): 100 billion baht (US\$3.2 billion), providing financial assistance to small and medium-sized enterprises as well as tax relief, and cash handouts.
	<b>Phase 2</b> (24th March 2020): 117 billion baht (US\$3.56 billion), focused on enhancing the incentives provided in Phase 1.
	<b>Phase 3</b> (7th April 2020): 1.9 trillion baht (US\$58 billion) including: <ul style="list-style-type: none"> <li>(i) 1 trillion baht (US\$30 billion) loans, of which (i) 45 billion for healthcare; (ii) 555 billion baht for financial aid and cash handouts; and (iii) 400 billion for economic rehabilitation.</li> <li>(ii) 500 billion baht (US\$15 billion) for business liquidity, which will be spent on funding commercial banks to lend to firms with liquidity problems.</li> <li>(iii) 400 billion baht (US\$12 billion) for financial stability, to be spent on setting up the Corporate Bond Liquidity Stabilisation.</li> </ul>
<b>Equitable Education fund</b>	The Equitable Education Fund approved (1st May 2020) 2,000 million baht to support the cost of food for children for more than 750,000 low earning labourers.
<b>Social security contribution</b>	Reduction in the rate of contributions to the Social Security Fund or employers and employees for 3 months.
<b>Health insurance</b>	Thai social security agency will cover all medical costs of those infected with COVID-19. Health insurance premium deductions increased to 25,000 baht (\$760) from 15,000 baht (\$460).
<b>Unemployment benefit</b>	<b>Workers covered by Social Security Fund</b> receive increased unemployment payments. As of May 2020, nearly 1.2m million people had applied for unemployment benefits due to furloughs and firings (nearly 1 million were eligible). Between April 20th to May 2nd, 455,717 people were paid by the Social Security Office under disbursement of 2.3 billion baht. Of these 207,895 remain to be paid with almost 30,000 awaiting verification. There is an increase of around 30,000 new claimants per week.
<b>Wage subsidies</b>	SMEs can receive wage subsidies from April to July 2020 for employees who are members of Social Security Office and receive salary of up to 15,000 per month.
<b>Universal Coverage for Emergency Response (UCEP)</b>	Thai's universal health system eligible for all Thais and working foreigners (with a valid work permit). Enables patients to seek treatment at their nearest hospitals free of charge for the initial period of the illness.
<b>Tourism sector-targeted aid</b>	Up to 100 billion baht in soft loans for tourism operators, while repayment holidays can be requested by those who do not need fresh funds

Stimulus package	Details
<b>Monetary and fiscal response</b>	<p><b>Fiscal package</b> approved (30th April 2020) with three phases equivalent to 8.9% of GDP on measures for (i) health related spending; (ii) assistance for workers, farmers, and entrepreneurs affected by COVID-19; (iii) support for individuals and businesses through soft loans; (iv) lower water and electricity bills, and lower employees' and employers' social security contributions.</p>
	<p><b>Additional borrowing capacity</b> authorized by Royal Decree: 1 trillion baht, including 600 billion baht for COVID-19-related health spending and compensation for people affected, and 400 billion baht to help revitalize those parts of the economy affected by the outbreak</p>
	<p><b>Monetary Stimulus:</b> The Bank of Thailand reduced the policy rate to 0.75%.</p>
	<p><b>Monetary measures</b> to help business include (i) soft loans by the Bank of Thailand to financial institutions; and (ii) relaxation of repayment conditions for business.</p>
	<p><b>Measures to support financial sector stability:</b> (i) Corporate Bond Stabilization Fund was established by the Bank of Thailand; (ii) Bank of Thailand purchased government bonds in excess of 100 billion baht in March 2020; (iii) Bank of Thailand bond issuance were reduced or cancelled, and (iv) a special facility was set up to provide liquidity for mutual funds through banks.</p>



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## Chapter 2

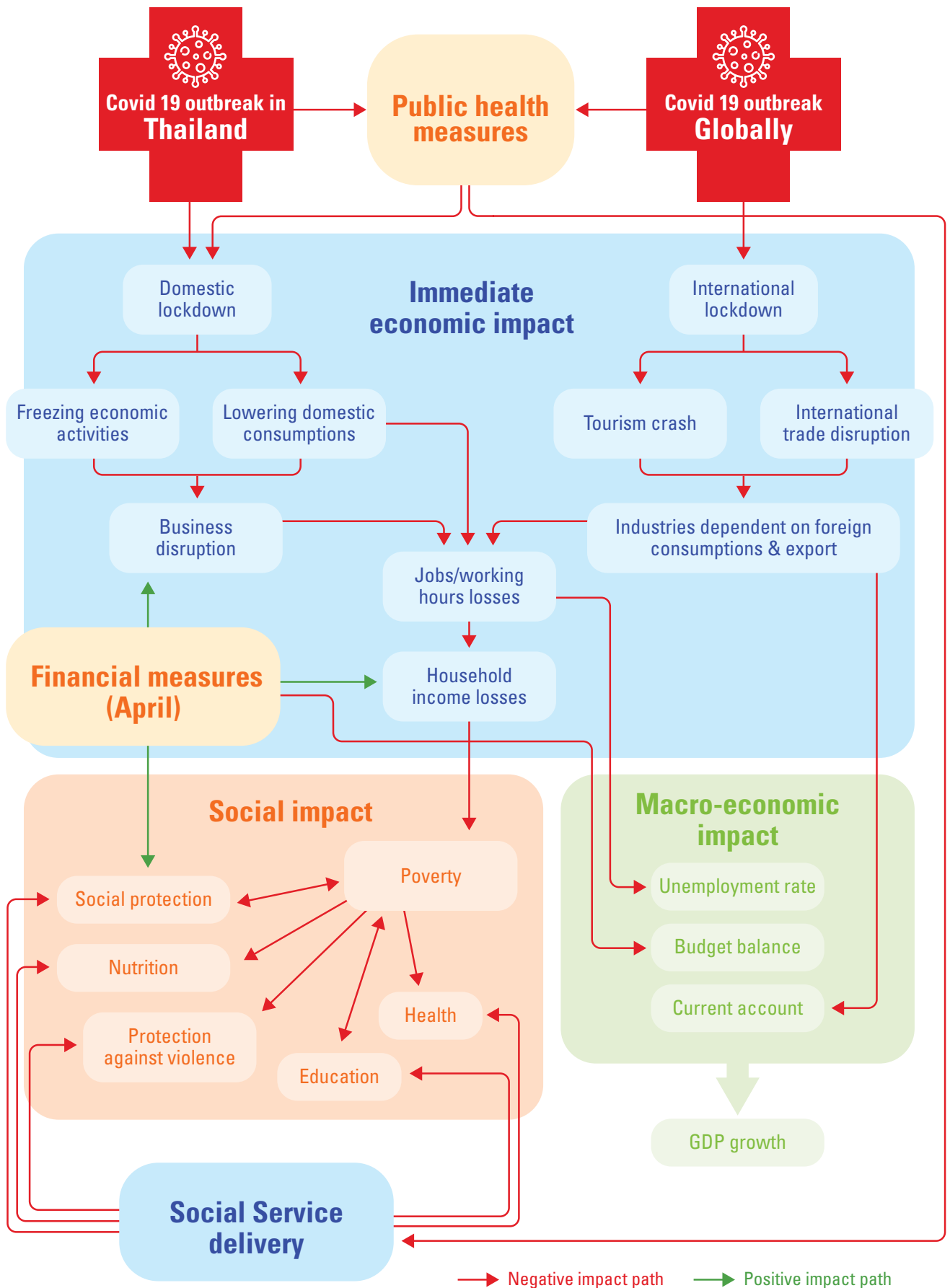
# Socio-Economic Impact of COVID-19

## Inter-connectedness of Economic and Social Impact

The causal relationship between the pandemic, the immediate economic impact, the macro-economic impact, and the social impact is depicted in Figure 1. It offers explanation on how COVID-19 caused economic disruption that affected lives, pushing vulnerable groups into poverty, and created social problems. The macro-economic indicators, in turn, mirror the severity of the crisis.



Figure 1: Impact Pathway Analysis on Overall Economic and Social Impact of COVID-19



## Macroeconomic Outlook

### Key messages

This crisis is one that hits the real sectors. Effects on growth will depend on the global response and control of the pandemic, and the state of global supply chains. The most critical impact is on the ability of businesses to employ workers. Job loss and reduction of working hours will affect household income with social impacts.

The timing and speed of recovery from recession are disputed, but a return to growth by 2021 or 2022 is expected. Unemployment is forecast to peak at just over 3% in 2020, before returning to a rate close to the long-run trend. In the meantime, working hours are falling. The current account balance will fall sharply in 2020, with an associated currency depreciation, before recovery in 2021. There will be a marked increase in the budget deficit due to the government bailouts, but this will also improve in 2021-25.

The stimulus package is key to keeping fundamentally viable businesses alive in preparedness for recovery. Any changes to the stimulus package should reflect the different impact of possible measures, with government consumption spending likely to have the greatest impact.

**Growth.** All forecasts are of short-term recession in Thailand, but there are differences in the extent of the fall and the speed of recovery. A 3% global contraction is forecast - much worse than during the 2008–09 financial crisis. If the pandemic fades in the second half of 2020 and containment is gradually unwound, the global economy is projected to grow by 5.8% in 2021.<sup>9</sup>

The Economist Intelligence Unit sees Thai GDP declining by 4.3% in 2020 - amongst the sharpest projected declines in the East Asia and Pacific Region. Rapid recovery is nonetheless expected from the third quarter of 2020, with growth rebounding and averaging over 3% in 2021-25. But GDP will still be 5% lower in 2025 than if there had been no pandemic. Without the stimulus package, The Economist Intelligence Unit forecasts that the economy would have contracted by 5.8% in 2020.

The World Bank forecasts a 10% contraction in 2020, with a projected recovery to pre-COVID output levels in 2022<sup>10</sup> based on growth of 4.1% in 2021. Other forecasts are of a much sharper contraction and sharper recovery, including a fall of 6.7% in 2020 and recovery to 6.1% growth in 2021.<sup>11</sup>

The Bank of Thailand's forecast suggests the largest contraction, at 8.1% in 2020.<sup>12</sup> The Thai economy was already slowing, with growth down from 4.2% in 2018 to 2.4% in 2019, with nominal wages falling during 2019. Slower growth was caused by lower demand for exports, reduced public investment,<sup>13</sup> and the drought. The 2020 contraction because of COVID-19 is associated with sharply falling exports, as well as negative private investment.<sup>14</sup>

9 IMF, 2020

10 World Bank Group, 2020

11 Santander, 2020

12 Bank of Thailand, 2020b

13 Decreased private and public investments led to aggregate investment shrinking by 6.5 percent year on year in the first quarter of 2020. Public investments slowed considerably.

14 Deloitte, 2020



**Unemployment.** Estimates based on official unemployment statistics suggest that unemployment rate is expected to rise to 3.1% in 2020, with a 4.5% rise in female unemployment (the unemployment rate in 2019 was 1.1%).<sup>15</sup> Unemployment is projected to fall back to 1.4% in 2021-25. International Labour Organisation estimates (which include the informal sector)<sup>16</sup> suggest that as many as 3.7 million people could be unemployed by the second quarter of 2020.<sup>17</sup>

Thailand's workforce in 2019 was 37.6 million, with more than half in the informal sector, meaning that they are not covered under social security schemes. The sectors most affected include accommodation and food services (2.8 million jobs with 63% informal), wholesale and retail trade (6.2 million jobs with 55% informal), construction (2.2 million jobs with 45% informal), transport, storage and communication (1.5 million jobs with 36% informal), and manufacturing (6.1 million jobs with 21% informal).<sup>18</sup> Agriculture is the largest employer (11.8 million) with very high informality (92%). While employment in agriculture is expected to be less badly hit by COVID than other sectors, the effects of the drought are also being felt.

Between 6.6 and 7.5 million jobs are at risk in the current crisis, in terms of job loss or reduced working hours and wages. Some 21 million workers in the hardest hit sectors will bear the brunt in terms of reduction of working hours, wage cuts or layoffs. Thailand saw a 6% fall in working hours in the first quarter of 2020 (relative to the last quarter of 2019), with a total 10% fall relative to 2019 expected in the second quarter. This inevitably means household income losses. The sharpest falls in employment are expected to be for unskilled labour.<sup>19</sup>

Some 3.7 million jobs done by women (22% of the 2019 female workforce) and an equal number of male jobs are at risk in the higher impact scenario. More women are in the high-risk sectors more than men. The sectors at highest-risk are tourism, retail, accommodation, food, and manufacturing in export-oriented products.

**Current account balance.** Weaker global demand has led to contraction in global trade, which has disrupted global value chains (such as automobiles, in which Thailand participates), and hit exports.<sup>20</sup> The biggest impacts in Thailand are in tourism, with a near cessation of international tourist arrivals since March 2020. The shock from export and import disruption is expected to be particularly marked in Thailand since exports and imports make up a high percentage of GDP.<sup>21,22</sup> These real sectors account for most formal employment. The Bank of Thailand forecasts that exports will start to pick up by the third quarter of 2020 when the global economy begins recovery.

Thailand's current account surplus is expected to fall sharply to 2.1% of GDP in 2020, from around 7% of GDP in 2019. Over the medium term, the current account surplus rises as merchandise shipping and inbound tourism recover in 2021. Over 2021-25, the forecast is a current account surplus averaging nearly 6% of GDP, with reserves staying adequate throughout.<sup>23</sup>

The weak global and domestic economic outlook, particularly in the tourism sector, is expected to result in a sharp depreciation of the Thai Baht by nearly 8% in 2020. Thailand's consistently large current-account surplus and foreign-exchange reserves (currently at 14 months' import coverage) offer exchange rate stability through 2021-2024. As a result, the Baht is expected to appreciate in 2025 as the macroeconomic situation improves.

15 Historically, the unemployment rate in Thailand has been low, even at times of recession. During the Asian Financial Crisis, which was a deeper recession than forecast for 2020, the official unemployment rate did not exceed 4.4%. During the global financial crisis, the annual unemployment rate peaked at 1.5%.

16 ILO Stat, 2020

17 ILO, 2020

18 Ibid.

19 Office of the UN Resident Coordinator, 2020

20 Export growth rate of Thailand in May 2020 have already seen -23% overall, with automotive ranked top at -56.4%, followed by textiles (-37.3), machinery (-32.6), metal and steel (-28.2), and electrical appliances (-26.7).

21 Exports and imports make up 100% of Thailand's GDP as compared to 69% in South Korea, 46% in Philippines, 32% in Malaysia and 28% in Japan. Deloitte, 2020

22 Bank of Thailand, 2020a

23 Some trends nonetheless appear confounding, with Thailand's trade data for March 2020 encouraging. Exports rose by 4.2% year-on-year, contradicting expectations of a 5.8% fall. Imports grew faster, by 7.3%, against the estimate of an 8% fall. The main export drivers were electronics with 8.6% year-on-year growth, but autos and parts continued to be weak, with a 5.6% fall.

**Budget deficit.** Forecasts suggest that, with the current stimulus package, the budget balance will worsen to 6.5% of GDP (from about 2.7% after the October 2019 budget). As well as sharp expenditure increases associated with the stimulus package, tax revenues are declining (revenue fell by nearly 8% in March 2020), with revenue from all types of tax falling. The bailout has raised Thailand's public debt to its ceiling. Over 2021-25, the budget balance is expected to recover, averaging close to 3.2% of GDP. Support from the fiscal stimulus package to economic activity during this period would offer a recovery in government revenues, partially offsetting the impact of increased borrowing.

## Impact on Key Industrial Sectors

### Key messages

lower demand affects most firms, with revenues falling.<sup>24</sup> Access to the government's support to enterprise is variable and, even with support, firms will take time to recover. Some firms will probably go out of business. Small firms also have the least access to support provided by government stimulus schemes.<sup>25</sup> Tourism is the worst hit sector, although firms in other sectors are also facing sharp falls in demand, with some estimates suggesting 50% loss of revenues. Small and medium enterprises in the services sector are expected to be badly hit. Sectors relying on exports suffered sharp contraction. The global recession and reduced demand from Thailand's trading partners will delay recovery in these sectors. A rise in non-performing loans is expected, some of which results from household debt due to falling income and reduced ability to service debt.

**Tourism.** Estimates of impact are based on tourism revenue falling by 70% in 2020.<sup>26</sup> Forecasts are based on increased tourism from the fourth quarter of 2020, with GDP sensitive to later and slower recovery of tourism.<sup>27</sup>

All tourism-related sub-sectors (including accommodation, air transportation, tour agencies and food and beverages) would contract in 2020. As in other sectors, keeping fundamentally sound businesses alive will be important to eventual recovery. Tourism in Thailand is dominated by micro and small enterprises which have low financial reserves to absorb shocks and hence support is important.

More than 50% of those employed in tourism are informal, with over 70% of tourism employment in food and beverages, a subsector badly hit by closures. The share of tourism in total employment is higher in urban areas which are therefore more likely to face rising unemployment and weakening consumer expenditure.

<sup>24</sup> UNIDO survey reported that the biggest issue with which the firms have struggled is the shortage of cash flow with 82% of responding firms facing this problem. The main cause are reduced sales due to falling demand, which was reported by more than two-thirds of firms, and the increased difficulty of obtaining financing. The shortage of inputs ranked as the second biggest challenge with almost 70% of the firms facing this issue. Shortages might have been caused by value chain and logistics disruptions, including the inability to make deliveries perhaps due to containment measures such as border closures. In addition, more than half of firms have struggled to fulfill contracts and faced labour shortages.

<sup>25</sup> UNIDO, 2020

<sup>26</sup> The Thai government had initially set a target of nearly 42 million international arrivals in 2020: an increase from 2019 of nearly 40 million. Following the pandemic, inflows of international tourists are now expected to begin recovery only in the fourth quarter of the year. As of May 2020, the Tourism Authority of Thailand forecast the number of foreign tourists in Thailand at approximately 14 million for 2020.

<sup>27</sup> Assuming a best-case scenario, a 60% decline in tourism revenues during 2020 will lead to a 3.5% decline in real GDP and an unemployment rate of 2.89%. In the worst-case scenario that tourism revenues drop by 85% during 2020, the decline in real GDP will deepen to 5.6% and unemployment will rise to 3.42%.

**Agriculture.** Several factors affect agriculture including restrictions on marketing and input supply (caused by movement restrictions) as well as the drought. The yield of major crops - rice, rubber, and sugar – all fell in 2019 due to the drought. Restaurant closures and lower demand for food because of the fall in tourism have impacts on domestic producers, as will lower wages and salaries due to unemployment and shorter working hours.

Rising prices for some commodities will nonetheless mean that agricultural value-added will increase relative to 2019, supporting the sector's ability to maintain employment. Agriculture may also offer employment of last resort, although with labour productivity falling as a result.

Impacts on supply chains are uncertain, but with no major supply interruptions reported to date, even with controls on movement. Effects on input supply are uncertain for the same reason. Cash assistance to farmers and agricultural workers will have beneficial poverty effects since the amounts are high relative to agricultural earnings.

**Sectors relying on export.** Exports contracted in May 2020 falling 23% overall, with automotive at the worst affected (-56%), followed by textiles (-37%), machinery (-33%), metal and steel (-28%), and electrical appliances (-26.7). These sectors account for most formal employment.<sup>28</sup>

**Automotive industry.** Forecasts suggest a sharp contraction in demand for motor vehicles and spare parts,<sup>29</sup> before a strong recovery in 2021. Supportive measures such as tax relief and lower interest rates will have limited impact in driving domestic demand for vehicles due to a weak economic climate carried over from 2019. Relocating supply chains from China amid the tradewar may benefit the industry in the longer-term, with Thailand further strengthening its position as ASEAN's largest automotive producer and the world's sixth.

**Consumer goods.** Retail sales are expected to fall in 2020 (recovering with 5% growth in 2021), with expenditure on consumer goods forecast to see growth in 2020, continuing into 2021. This is the result of the cash handouts under the stimulus package. Sales are still lower than the forecasts for the 'without pandemic' scenario.

**Healthcare.** Major increases in pharmaceutical sales are expected (10% increase in 2020 and 5% in 2021). Healthcare spending will also increase. This is from a lower base than other ASEAN countries, and will increase because of the pandemic, but also because of Thailand's appeal as a base for medical tourism. The fiscal stimulus package makes allocations to healthcare with the aim of increasing capacity.

**Financial sector.** Non-performing loans are expected to rise due to falling business income and reduced ability to service debt. The banking sector has increased lending to households and, with incomes under stress, this account for 30% of non-performing loans.<sup>30</sup> This is mitigated by cash handouts.

**Telecommunications.** The pandemic causes a mild downturn in 2020, but with recovery in 2021. In the long-run, the industry is expected to witness strong growth, driven by the continued focus on digitalisation and plans to build smart cities.

28 Bank of Thailand, 2020a

29 The manufacturing sector overall contracted by 2.2% in the fourth quarter of 2019 and 2.7% in the first quarter of 2020, continuing weak performance over several quarters. This reflects the slowdown in exports, particularly for motor vehicles, food products and non-metallic mineral products. In contrast to previous quarters, domestically oriented manufacturing industries such as beverages, tobacco, textile and apparel, also contracted in the first quarter of 2020 due to reduced private consumption.

30 There are two sources of vulnerability in the banking system, which will be exacerbated by the COVID-19 crisis: household indebtedness and weaknesses in the corporate sector and in small and medium enterprises. Lockdown measures and slowdown in economic activity have resulted in firms and households facing immediate liquidity shortages, impairing their ability to repay loans. Household debt in Thailand is the second highest in East Asia. Credit to households saw a rapid expansion over the last decade, reaching over 80 percent of GDP by 2015 from 60 percent in 2010, largely driven by auto loans and housing loans.

## Impact on Social Sectors

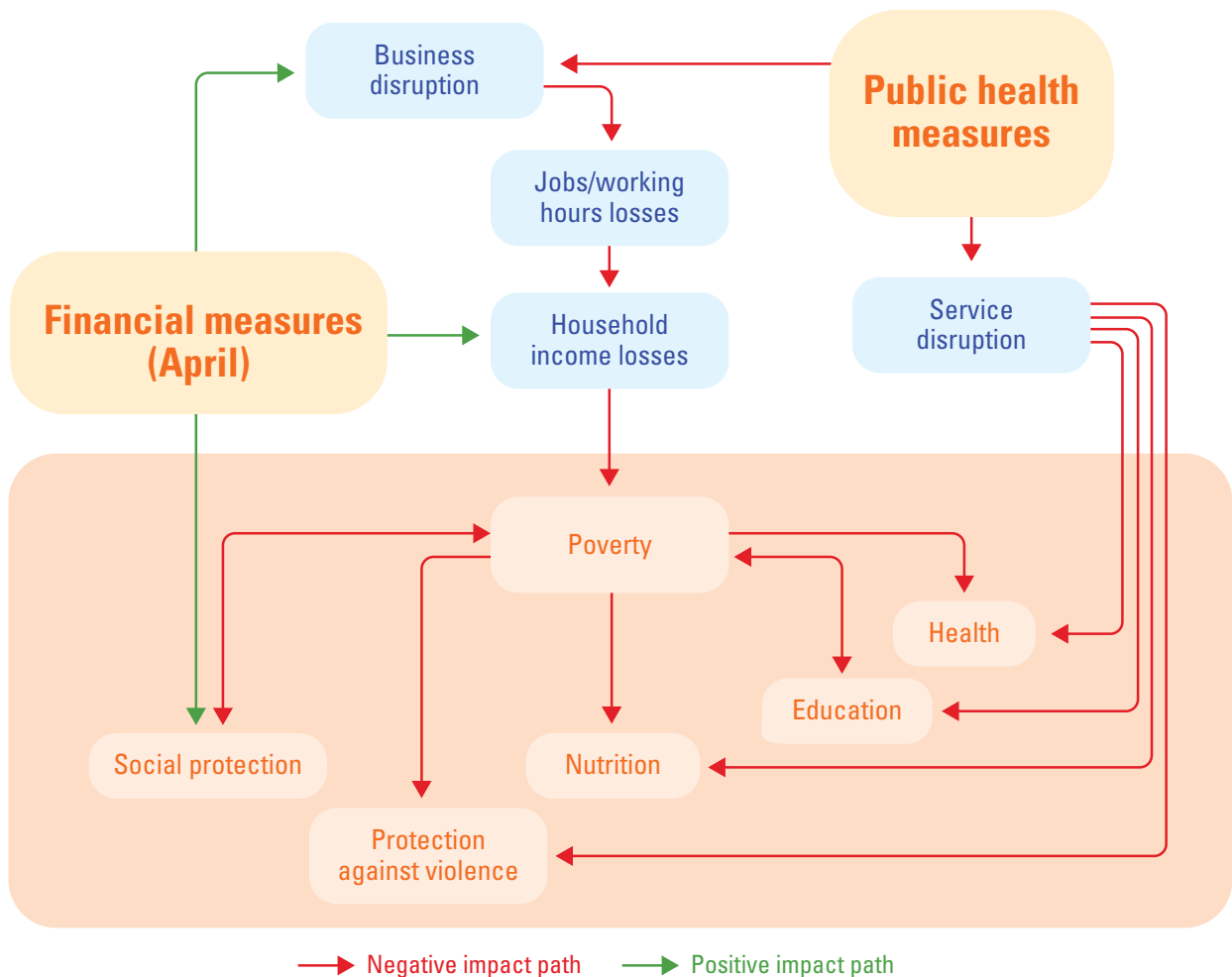
### Key messages

social impacts result from poverty, which in turn, is affected by loss of household income due to lay-offs, furlough, or working hours loss, as well as from disruption of delivery of social services. Public health measures adversely affected service delivery related to education, nutrition, or protection through school closure and diversion of resources to cope with COVID-19. Poverty has been temporarily alleviated because of cash handouts but will deteriorate when it ends.

The most affected groups are people in poverty, children and the elderly, those with disability and chronic illness, and the urban poor. Informal workers also bear a heavy impact as they are not covered by social protection schemes. With less resources to mitigate the income shocks, they are the most vulnerable both before and after the crisis.

It is important to strengthen social safety net by protecting jobs to ensure household income which will enable household to independently cope with the crisis, as well as expanding social protection in forms of direct cash transfers to the most vulnerable groups.

Figure 2: Impact Pathway Analysis of Social Impact Resulting from Financial and Public Health Measures



**Poverty.** Between 2015 and 2018, the poverty rate in Thailand grew from 7.21% to 9.85%, with the absolute number of people living in poverty increasing from 4.8 million to more than 6.7 million.<sup>31</sup> Income equality remains a significant issue with inequality amongst the highest in the region.<sup>32</sup>

The main factor affecting poverty is loss of jobs or reduction in working hours. Since 72% of household income comes from jobs, losses, or reduction in working hours mean those households must survive on savings. Estimates suggest that an average household can last for up to nine months without income. But poor households can survive for only three months.<sup>33</sup>

**Mitigating the COVID-19 impact on poverty.** The Royal Thai Government reacted promptly and was one of the first countries to announce financial measures to mitigate the impact on businesses and households due to the lockdown. This provided a safety net for the poorest households.<sup>34</sup>

In the third quarter of 2020 with continued unemployment, but no public handouts, the poverty rate is expected to increase to 9% nationally, compared to 8% in the second quarter. Poverty increases among the rural population, informal private employees, state employees, and own-account workers.<sup>35</sup> The poverty rate amongst these groups looks on track to return to pre-COVID levels by the last quarter of 2020.<sup>36</sup> Workers in industry, tourism and other services see net drops in income of -23%, -21%, and -19% respectively, workers in agriculture see incomes rise by 53% as a result of the government handouts, and thus rural poverty decreases from a rate of 12% to 4% in the second quarter.

**Targeting the most vulnerable groups.** The poverty rate for informal workers increased from 10% to 21%, partly because they are not eligible for social protection.<sup>37</sup> The group with the highest poverty rate is those living with disability and/or chronic illness.<sup>38</sup> Poverty in this group will rise to 15% (up from 13% in the second quarter and 14% pre-COVID). This group needs full social protection.<sup>39</sup> However, the accuracy of the number of people with registered disabilities is questionable as it is very low, meaning that there could be many who are left out.

Across rural areas poverty decreases from 11% to 9% because of the government relief package. Meanwhile in urban areas poverty increases from 4% to 6%.<sup>40</sup> However, it seems both the rural poor and the urban poor could manage through the second quarter with the cash handouts. If the economy does not recover and jobs do not return, they probably cannot survive based on savings after three months.<sup>41</sup>

Some companies have shut down and laid-off employees. The reduction of income through job losses will be highest for workers in the tourism sector (-22%), but those in industry and other services will see significant falls in income (-15% and -13% respectively), resulting in a rise in poverty for workers in these sectors.<sup>42</sup>

31 The World Bank, 2020

32 OPM, Chapter 2, 2020

33 Average household debt per person is 63,038 baht and the average value of household financial assets per person is 60,548 baht. In poor households, the average household debt per person is 13,387 baht, while the average value of household financial assets per person is 6,145 baht.

34 OPM reported that the economic impact was heaviest in the second quarter. But the stimulus means that household incomes would fall by only 11% on average. Urban poverty rates would increase from 4% to 6% whereas rural poverty rates would fall due to cash handouts to farmers nationwide. In Q3, when the stimulus payments is removed and the economy begin to pick up, the temporary reduction in rural poverty reverses and urban poverty stays at the higher level of 6%, gradually returning to normal through 2021.

35 Poverty increases to 11% in rural areas compared to 9% in Q2, putting it back to its pre-COVID level of 11%. Non-regular private employees remain the group with the highest risk to poverty (20%), with poverty also rising to above pre-COVID levels for state employees. Own account workers and contributing family members, who in Q2 had been buttressed against this deterioration in welfare by the government handout, remain less at risk of poverty than they were in Q2 as a result of the handout, but poverty nevertheless rises for these groups (from 4% in Q2 to 6% in Q3 for own account workers, and from 3% in Q2 to 5% in Q3 for contributing family members).

36 Own account workers, contributing family workers and non-regular private employees are concentrated in rural areas (roughly at ratios of 2:1 vs urban areas), whereas regular private employees are concentrated in urban areas (again at roughly 2:1).

37 This non-regular private employees see income before the government handout decline by 52%, and after the handout by 25%. Due to the lower level of benefits received, they also see a large net reduction in income, of 31%. However, because this group has higher incomes on average than non-regular private employees, large as their reduction in incomes is, it does not result in a rise in poverty. OPM, 2020

38 Ibid.

39 Old-Age allowance, Disability grant, Social Welfare card, social security fund, and child support grant

40 This situation is worst in Bangkok, where poverty increases from 0% to 3% via an average net change to income of -23%.

41 Ibid.

42 Ibid.

**Social protection.** Thailand has well-developed social protection provisions that includes several social assistance and social insurance programs. The non-contributory welfare programs are complemented by a comprehensive social insurance scheme managed by the Social Security Office. This provides several benefits including pension, child allowance, unemployment benefit, sickness compensation and disability compensation. (See annex A for the features of the main social protection programmes in Thailand).<sup>43</sup>

**Gaps in the coverage of social protection schemes.** Universal schemes such as pensions and health insurance have the highest level of coverage. Within social assistance programmes, the Social Welfare Card<sup>44</sup> provides the largest coverage, followed by social pension targeted at the elderly, school meals, disability grant, and the child grant.

The current set of social protection programmes, though extensive, has some gaps. These include:

- **Categorical social assistance schemes:** Child Support Grant, Social Pension and Disability Grant exclude non-Thai residents, including migrant workers.
- **Social Welfare Card** also excludes non-Thai residents, including migrant workers. Targeting accuracy is problematic in implementing this programme.<sup>45</sup>
- **Social Security Fund** mainly covers workers in the formal sector,<sup>46</sup> plus a small number of informal sector workers for whom the adequacy of the benefits is low.<sup>47</sup>

**Key challenges.** Social protection will continue to be important from the third quarter of 2020 onwards for the vulnerable groups, to sustain aggregate demand, mitigate poverty and prevent economic downturn. The government would be able to do this under funding from the relief loan. However, with tight budget constraints, all additional programmes need to be well targeted. This is hindered by the lack of a comprehensive policy and of a database on social protection. This prevents eligibility and benefits being monitored across ministries. There is a need to realign and unify the social protection programmes operated by many ministries. This includes a coordination mechanism with authority to convene across all social assistance schemes<sup>48</sup> and a system for managing information across programmes<sup>49</sup>



43 Ibid.

44 The Social Welfare Card provides benefit of 200-300 baht per month to individual with income lower than 100,000 baht per year. It covered approximately 13.9 million people in 2020. Ibid

45 The Social Welfare Card targeting mechanism consists of an on-demand process in which people have to register in certain banks. This type of process can lead to exclusion if the poor face substantial barriers that prevent them from applying (long distances, lack of information, etc.). Moreover, the eligibility assessment is based on self-reported income, with few checks and verifications. The program also assesses eligibility at an individual level, which means that an individual could be deemed eligible even when they are member of a household that is not poor.

46 The COVID-19 scheme of 5,000 baht for workers not in the Section 33 of the social security system is generous, providing 217% of the international poverty line and 76% of average consumption). The job suspension and job loss benefits for workers covered under Section 33 depends on their salary, ranging from 4,092 bath (178% of the international poverty line) to 10,500 baht (456% of poverty line). The exception is the disability benefit of 1,000 baht, which represents 43% of the international poverty line and 15% of average consumption. OPM, Chapter 2, 2020

47 Most informal sector workers are likely to be excluded from the Social Security Fund due to requirements for regular voluntary contributions.

The cash handout excludes sex workers and undocumented migrants. There are also difficulties in accessing information, especially for non-Thai speakers during the lockdown.

48 Thailand does not have a common and integrated social protection policy framework and there is no common definition of social protection that is formally accepted by the various actors operating in the sector. Numerous legal instruments regulate social protection interventions, but this regulatory framework lacks coherence and there is no comprehensive policy vision for the sector. There is the lack of communication between the different actors involved and the absence of a clear leader in the sector. Ibid.

49 Social protection databases are not integrated and the separate databases that do exist do not always talk to each other. There is a lack of an integrated beneficiary registry that would enable monitoring and coordination of who receives what benefits, and for identifying intended or unintended duplications across programs (Leite et al., 2017, cited in OPM, Chapter 2, 2020)

For the hard-hit informal sector, policy choices may include integrating the informally-employed into the formal system and have both contributory and non-contributory social security. Expanded coverage of the informal sector (including migrants) by social security may raise concerns about fairness and there are questions about political viability.

**Health.** Thailand was the only middle-income country listed in the global top 10 countries for pandemic preparedness in the Global Health Security index.<sup>50</sup> Even at the peak, the number of confirmed cases never exceeded 200 per day, and the death rate per million population was less than 1.<sup>51</sup> The situation was contained due to strong community-based contact tracing and quarantine. There were also further public health measures such as movement control and partial lockdowns following the announcement of a state of emergency in March 2020. Within two months the pandemic had been contained.<sup>52</sup>

Five factors contributed to Thailand's successful containment of the virus. First, the early decision to implement public health measures and control. Second, despite some initial sluggishness in cooperation, there was good coordination (including public and private, health and non-health, national and community level, and between different departments within the Ministry of Public Health).<sup>53</sup> Third, communication was effective and created awareness and compliance in wearing masks in public, washing hands, and physical distancing.<sup>54</sup> Personal hygiene behaviour reduced transmission risks for COVID-19, as well as other infectious diseases. Fourth, the strength of the primary healthcare system and the availability of over 1 million village health volunteers to help with the COVID-19 response allowed the health sector to implement effective contact tracing and quarantine of suspected cases. Fifth, universal health insurance system reduced financial barriers to treatment and assured access to coronavirus screening and medical treatment for all.

With lower traffic, air pollution is also lower, with the average PM 2.5<sup>55</sup> level reduced by 20%. The negative impact has been largely on mental health, while lack of exercise and movement restrictions led to a decrease in physical activity. The mental health impact is a result of numerous lockdown stresses and impoverishment. These can be more intense among people at high risk of catching the disease or more vulnerable to complications, such as the elderly, patients with chronic diseases, as well as healthcare staff.<sup>56</sup>

**Education.** Impacts on the education sector are due to lockdowns and school closures. The first COVID case was toward the end of school year and, when a state of emergency was announced in March 2020, schools had already closed. This helped prevent the spread among the younger population, as well as giving time for the government to plan and arrange for school reopening. The school reopening date was delayed and preparations made for distance education.

Distance education service replaced attendance at school from June to August 2020. Feedback points to some shortcomings. Some students could not access lessons because they did not have tablets or computers<sup>57</sup> and, in some areas, bandwidth is limiting. The situation is worse among children living without their parents.<sup>58</sup> Some online materials were of poor quality<sup>59</sup> and few teachers had received training on using technology to deliver remote education.<sup>60</sup> Home schooling also affects household income since some parents must stay at home.

50 <https://www.ghsindex.org/>

51 Since June 3, number of deaths stopped at 58. National Research Office and Department of Disease Control, 2020

52 OPM, Chapter 3, 2020

53 The number of COVID-19 testing laboratory sites has increased from two at the start of the year to more than 173 currently, with 207 laboratories estimated to be available soon. More surgical masks are produced locally and distributed to health facilities. Stockpiling of antiviral drugs means there will be enough to treat 6,000 new cases. For medical care facilities, the Ministry of Public Health has prepared and strengthened the hospital capacity, surgical mask management and healthcare personnel. Currently, the healthcare service system can accommodate 250 new infected cases per day or a maximum of 500 cases per day.

54 The proportion of the population wearing masks in public has remained quite high, at more than 90% for most of April; more than 80% report washing their hands regularly; and over 60% maintain physical distancing of more than 2 metres. Ibid.

55 Particulate matter in the air

56 The Department of Mental Health reported that mental health hotline service saw an increase of over two-thirds compared to last year. In the first four months of 2020, there were 1,416 suicide deaths, a 14.3% increase on the same period last year. It is estimated that by the end of 2020, the suicide death rate will be higher as the economic impact will be more prominent in the later months. The overall suicide death rate in 2020 could reach a level similar to that during the 1997 economic crisis of up to 8–8.8 per 100,000 population, or an increase of over 30% on the range in the last 12 years of around 6–7 per 100,000 population.

57 Kertbundit, 2020 cited in OPM Chapter 4, 2020

58 According to IPSR, Seven in 10 children living without their parents have no electronic devices for online learning, and they are about twice as likely to have caregivers with no IT skills for online learning compared to those living with parents. IPSR, 2020

59 Supanitayanon *et al.*, 2020 cited in OPM Chapter 4, 2020

60 Kenan Foundation, 2020 cited in OPM Chapter 4, 2020

**Child development and protection.** Schools offer a School Feeding Programme that includes milk and meals for children in Early Childhood Development Centres and for primary school students. The delay in the start of the academic year left a gap in child nutrition for the most vulnerable. For these students, school closure had an impact in terms of increased hunger and malnutrition.<sup>61</sup>

The Ministry of Education and the Ministry of Interior safeguarded students who attend Early Childhood Development Centres<sup>62</sup> by organising meals to be collected by parents or delivered by teachers. For primary schools, there are no similar provisions, although organizations such as the Equitable Education Fund and other civil society groups arranged food packages for students for 750,000 of the most vulnerable families.<sup>63</sup>

Social lockdowns and school closure increased risk of sexual exploitation, sexual abuse, teenage pregnancy, and early marriage for girls,<sup>64</sup> as well as risk of domestic violence towards women and children. However, there is no evidence to date of this occurring during the COVID-19 lockdowns.

**Poorer families.** A survey of Equity Education Fund scholarship holders who are from poor families revealed that 41% of parents reported reduced income, 15% were on furlough, and 14% had lost their jobs.<sup>65</sup> Prolonged reductions in income will result in family's ability to support the auxiliary expense for students to go to school. Increased dropout rates are expected.

**Food and nutrition.** The impact of a crisis on food and nutrition generally is likely to be long-term. Experience from past economic crises and shocks has revealed that the hardest hit are children in the first 1,000 days of their lives.<sup>66</sup> Poor diets and nutrition during this important time in the life cycle have impacts in later years. The World Food Programme estimates that 4 million children in Thailand are missing out on school meals due to school closures.<sup>67</sup> Therefore, assessment of COVID-19 impact on food and nutrition should look at the underlying determinants that influence malnutrition outcomes. The determinants of malnutrition (adequate food, feeding practices, and healthy environments) are likely to worsen due to direct and indirect impacts from COVID-19.<sup>68</sup>

As a major food producer country, Thailand has fared well in food security, while undernutrition is not a big concern nationally. There are, however, health concerns for under-five wasting and stunting in some poorer provinces.<sup>69</sup> A fall in income directly effects purchasing power for food, leading to a reduction in overall food consumption; and/or substitution of more nutritious products for cheaper foods, such as staples and processed foods. So far, the social protection measures in place are likely to have offset these impacts<sup>70</sup>

**Protection against violence, exploitation, and abuse.** The combined indirect effects of economic stress and forced coexistence may result in increasing the risk of domestic violence. Economic distress reportedly heightens women's risks of experiencing violence. Some women are faced with sexual violence (forced sex by husbands or partners).<sup>71</sup> Lockdowns in homes with limited access to traditional reporting lines in provincial shelters, hospitals, and schools, meant that children may have suffered abuse undetected. Increased time of children online may also have exposed children to greater risks, such as sexual exploitation. A strong dataset on children at risk and gender-based violence would also have enabled prevention and response for at-risk groups during the outbreak and the implementation of related disease mitigation measures.

61 OPM, Chapter 4, 2020

62 <https://www.unicef.org/thailand/what-we-do/early-childhood-development>

63 Equitable Education Fund, 2020, cited in OPM, Chapter 4, 2020

64 Karki, 2020 cited in OPM, Chapter 4, 2020

65 EEF, April 2020, cited in OPM, Chapter 4, 2020

66 Block et al. cited in OPM, Chapter 5, 2020

67 World Food Programme, 2020, citing in OPM, Chapter 4, 2020. A survey conducted among school officials found that school meals were considered a key area where they thought families of children receiving financial assistance through the Equitable Education Fund programme would require support.

68 UNICEF conceptual framework for maternal and child nutrition outlines the immediate and underlying determinants of malnutrition. The framework highlights the impact of food system disruptions on nutrition – if just one component of the food supply chain (producers, traders, transporters, retailers) is impacted due to the COVID-19 shock, a ripple effect takes place in the food system which affects food availability, affordability, accessibility, and acceptability.

69 Ibid.

70 Ibid.

71 OPM, Chapter 6, 2020





**Women working in the informal sector** are predicted to suffer the harshest impact of COVID-19 with women forming 44% of the informal sector workforce. They work in the services most susceptible to the lockdown (such as tourism, hospitality, care, and domestic work) with the least social protection. UN Women reports that 66% of women saw a decrease in remittances received.

**Migrant workers** are also at risk. In 2019 there were nearly 3 million registered migrant workers in Thailand, plus an additional unknown number of undocumented migrant workers, mostly from neighbouring countries (Myanmar, Cambodia, and Laos).<sup>72</sup> Many do not have social security rights to healthcare and paid sick leave, particularly if they work in the informal sector and/or are undocumented.<sup>73</sup>

**Marginal groups.** People with disability and chronic diseases are the most vulnerable group as their physical problem combines with impoverishment.<sup>74</sup> Among this group, women with disabilities are at heightened risk of violence, exploitation, and abuse.<sup>75</sup> Often they are unable to get legal protection and redress because services are not accessible or because there is a lack of awareness of the issues that women and girls with disabilities face in regard to their vulnerability.<sup>76</sup>

LGBTI people are at increased risk of multiple forms of violence and abuse. A survey on the impact of COVID-19 on LGBTI community supported by UNDP and Asia Pacific Transgender Network found that LGBTI people experienced hardship that is generally similar to other population.<sup>77</sup> Around 14% of respondents, however, indicated they experience increased intimate, family, or gender-based violence or economic violence.<sup>78</sup>

Sex workers also bear the brunt of the lockdown as the government ordered closure of all places of entertainment with obvious impacts on their livelihoods.<sup>79</sup> Homeless people are penalized for non-compliance with curfew regulations. Government statistics suggest that there are approximately 2,700 homeless people in Thailand, although this is believed to be an underestimate.<sup>80</sup>

**Services.** Resources to support services from Hotline to One Stop Crisis Centres<sup>81</sup> and specialist services have been diverted to respond to COVID-19. Some hospital personnel have been re-deployed from the One Stop Crisis Centre to help with the COVID-19 response, others have taken sick leave. This reduced capacity to provide services and referrals within the multi-sectoral protection system to clients in crisis. Under state of emergency measures, One Stop Crisis Centre services (healthcare, counselling, and legal advice) have not been provided face-to-face, but instead are offered. This creates access problems for poorer families without access to computers, mobile devices, or the internet.

72 Migrant workers were engaged in labour-intensive sectors such as agriculture, fisheries, food processing, textiles, construction, domestic work, retail, and tourism.

73 OPM Chapter 6, 2020

74 OPM, Chapter 2, 2020

75 WHO, 2020, cited in OPM Chapter 6, 2020

76 Vallins et al., 2013, cited in OPM Chapter 6, 2020

77 36% of respondents said that the major impact of COVID-19 on them is loss of income/job (47%), no access to PPE supplies (38%), and unsafe living situations (36%). People are most affected by the lockdown and travel and movement restrictions (85%) and some voiced that the restrictions of movement and social distancing measures led to increased stress and depression. Most respondents stated that they are affected by the isolation, inability to socialize and do activities outside, and working from home for an extended period of time. These led to loneliness, increased stress and depression.

78 UNDP and Asia Pacific Transgender Network (ATPN) (2020)

79 OPM, Chapter 6, 2020

80 Pasuk, 2020, cited in OPM, Chapter 6, 2020

81 <https://evaw-global-database.unwomen.org/fr/countries/asia/thailand/2007/one-stop-crisis-centres>

## Chapter 3

# How the Pandemic Affects Thailand's Progress Toward SDGs



Prior to the pandemic, Thailand had been making progress towards achievement of the sustainable development goals. COVID-19 has had economic and social impacts that could affect this. Except for poverty and economic growth, it is too early to have evidence on impact, but trends can be predicted.

**Poverty.** Poverty fell sharply from 67% in 1986 to just under 8% in 2017. Recent years have seen increases, with poverty rising to nearly 10% in 2018 and the absolute number of people living in poverty increased from 4.8 million to more than 6.7 million.<sup>82</sup>

The pandemic risks further increase in poverty due to loss of jobs, falling incomes and lost livelihoods. The outbreak is expected to worsen, exacerbating an already poor situation for low-income households whose livelihoods are dependent on agriculture (31% of total employment is in agriculture). Farmers and labour in the informal sector are likely to be at the greatest risk. Many of those employed in tourism (9% of employment overall, not including the informal workforce) are also likely to be unemployed in the short-term and are at greater risk of falling into the poverty trap until the flow of tourists and business activities resume. Migrant workers in agriculture and tourism will be at risk due to limited access to economic and social benefits. According to the Ministry of Labour, as of August 2019, there were 2.9 million migrant workers in Thailand.<sup>83</sup>

The agricultural sector has faced a double blow from the pandemic and the drought in 2020. The cash handout to farmers' households has alleviated poverty in the short-term and workers in agriculture saw incomes rise by

82 World Bank, 2020 cited in OPM, Chapter 2, 2020

83 EIU, 2020

53%.<sup>84</sup> Without government handouts from the third quarter of 2020 onwards, the poverty rate is expected to increase to 9% nationally. For those working in agriculture who tend to be near the poverty line, poverty either remains unchanged or increases, and in rural areas it returns to the pre-COVID level of 11%.<sup>85</sup> Those living with disability and/or chronic illness will see poverty rise to 15% (compared to 14% pre-COVID).



**Zero hunger.** Thailand is on course to meet the targets for under-five overweight and stunting but off-course on other nutrition indicators (notably anaemia and exclusive breastfeeding) (Development Initiatives, 2020).<sup>86</sup> (See performance according to indicators in Table 2 Annex B).

Supply-side shocks relating to the availability and prices of food have not been a concern in the short run but could become so in the medium term.<sup>87</sup> The impact, rather, comes from the loss of income due to business disruption, which affects poor people and migrants more severely. A fall in income affects purchasing power for food, leading to reduction in food consumption and/or substitution of cheaper food (including staples) in place of more nutritious products.<sup>88</sup> So far, the social protection measures in place are likely to have offset these impacts. However, continuing slowdown of

economic activity in 2020 may affect food and nutrition security. Migrant households are at greater risk since they have higher rates of undernutrition and are also less likely to receive cash transfers. During the initial lockdown, food was provided by temples, community, civic groups, and individuals, which helped ease the short-term shock. However, in the medium and longer term with the slow economic recovery, incidence of poverty will worsen nutrition outcomes, especially among pregnant and lactating women and young children.



**Health and wellbeing.** Thailand has been making good progress on most of the health SDG targets. The extent of universal health coverage (SDG 3.8) and financial protection increased from 59% of the population in 2010 to 85% in 2019.<sup>89</sup>

Public health measures and lockdown have both positive and negative impacts. On the positive side, the ban on alcohol sales and travelling contributed to a 60% decrease in traffic accidents and 20% less particulate matter.<sup>90</sup> Better personal hygiene and health literacy and lower incidence of communicable diseases resulted in a 25% decrease in influenza, more than 40% fall in Dengue and Scrub typhus, and nearly two-thirds decrease in Measles. On the negative side, suicide in the first quarter increased 14% year-on-year. Mental health problems increased by two-thirds because of

stress during the lockdown combined with impoverishment. Also, mobilization of resources to cope with COVID-19 disrupted normal health service delivery and lowered the quality of care services, especially to the more vulnerable.

In terms of the health service, the government plans spending on the health system as part of the stimulus package, making healthcare spending rise by nearly 2%. This will allow the Ministry of Public Health to stockpile medical supplies and facilities in preparation for the next outbreak.

84 OPM, Chapter 2, 2020

85 Ibid.

86 Global Nutrition Report, 2020, citing in OPM, Chapter 5, 2020

87 OPM Chapter 5, 2020

88 OPM, Chapter 5, 2020

89 OPM, Chapter 3 (See detail of Thailand's performance on SDG 3 in Table 6 Annex B)

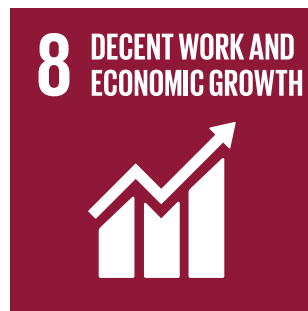
90 See Table 7 in Annex B



**Quality education:** there is no clear evidence of impact on the education performance indicators: enrolment, learning outcomes, quality of service and proportion of teachers. (See overall possible effects of COVID-19 on SDG 4 in Annex B). There was inadequate hardware, software, as well as limited preparation of teachers initially to deliver distance education. Poorer families are at disadvantage due to their limited access to digital devices and internet. The economic recession that followed the health crisis may cause students from poor families to drop out. Vulnerable groups may be at greater risk of dropout due to disproportionate effects on learning loss and the economic impacts of recession. Girls, who have previously had higher enrolment and learning outcomes, may be negatively affected.



**Gender equality:** prior to the pandemic, progress towards this goal had seen moderate improvement. The pandemic, however, seems to affect women more than men as more women are employed in sectors with high risk of disruption. According to ILO, 54% of workers in Thailand are in the informal economy, in which women are over-represented.<sup>91</sup> COVID-19 has also increased the unpaid care and domestic workload.<sup>92</sup> Moreover, the economic crisis places women at greater risk of sexual exploitation and sexual violence, as well as teenage pregnancies and early marriage.



**Protection against violence, exploitation, and abuse:** protection against violence, exploitation, and abuse cuts across SDG targets on gender equality (SDG5), wellbeing (SDG3), justice (SDG16), and decent work (SDG8).

Prior to COVID-19, Thailand has made good progress towards the achievement of some SDG targets (see Table 6 in Annex B). While post-COVID data have not yet been available, it is predicted that if the hardship prolongs into the medium term, the prevalence of diverse forms of violence, exploitation and abuse will increase.

Economic hardship due to the loss of job and/or working hours, coupling with stress from being forced to stay at home are sources of domestic violence.<sup>93</sup> Literature confirms that economic impacts place women and children at greater risk of sexual exploitation and sexual violence.<sup>94</sup> The crisis has also disrupted hotline and assistance

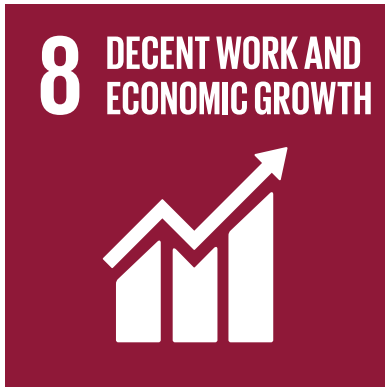
91 ILO, 2020

92 UN Women, 2020a

93 Gender in Humanitarian Action, 2020, cited in OPM, Chapter6, 2020

94 OPM, Chapter 6, 2020 'The economic impacts place women and children at greater risk of sexual exploitation and sexual violence (United Nations Children's Fund (UNICEF) Helpdesk, 2018). Intimate partner violence (IPV) and violence against children increase during times of economic stress (Fraser, 2020). The use of lockdowns to reduce the transmission of COVID-19, and calls to 'stay at home', are highly problematic for many women and children because homes are 'not safe' havens (Singano, 2020)

services, particularly those offering face-to-face interaction. From April 2020, the hotline service was expanded to include calls from children, the elderly and other vulnerable groups at high risk of contracting COVID-19, and the newly-unemployed. Temporary shelters now also accept the homeless as well as victims of domestic violence. The number of clients seeking services from the One-Stop Crisis Centres has increased significantly.<sup>95</sup>



**Decent work and economic growth.** Thailand had been making good progress towards achieving this goal prior to the outbreak. Negative impacts of the pandemic will undermine the achievement of the goal by reducing growth and hitting employment and wages. Declining domestic consumption and supply chain disruptions are expected to lower industry output. Economic growth is hampered by the crisis.



**Environment:** the lockdown from January to May 2020 resulted in carbon emissions falling by 10% compared to the same period previous year.<sup>96</sup> Endangered species and rare animals have been seen in national parks and wildlife conservation areas in the seas and the forests due to the closure of national parks and wildlife conservation areas.<sup>97</sup> Sea lives benefit from the lockdown and reduced tourism as water drainage from communities and hotels along the beach has fallen. This benefits sea quality and the growth of coral colony and sea grass, thereby bringing rare sea animals closer to the shore.<sup>98</sup> This demonstrates the richness of Thailand's natural resources that recuperate quickly because of environmental improvement. The challenge is how to build back the economy while minimizing the environmental trade-offs.

<sup>95</sup> The OSCC at Pathum Thani Hospital, for example, saw a three-fold increase in clients in February 2020 compared to February 2019 (from 8 to 24), and a two-fold increase in March 2020 compared to March 2019 (from 16 to 34). Some hospital personnel have been redeployed from the OSCC to help with the COVID-19 response. Under state of emergency measures, OSCC services have not always been provided face to face, but through online platforms.

<sup>96</sup> Thailand Greenhouse Gas Organization, 2020b

<sup>97</sup> Simachaya, 2020

<sup>98</sup> TDRI, 2020

## Chapter 4

# The Way Forward

## Key recommendations

Trade-offs in the way forward are the balance between health risk and economic loss; between domestic and external demand, and between growth and resilience.

There are four pillars which support the recovery of the Thai economy and help build a resilient society.

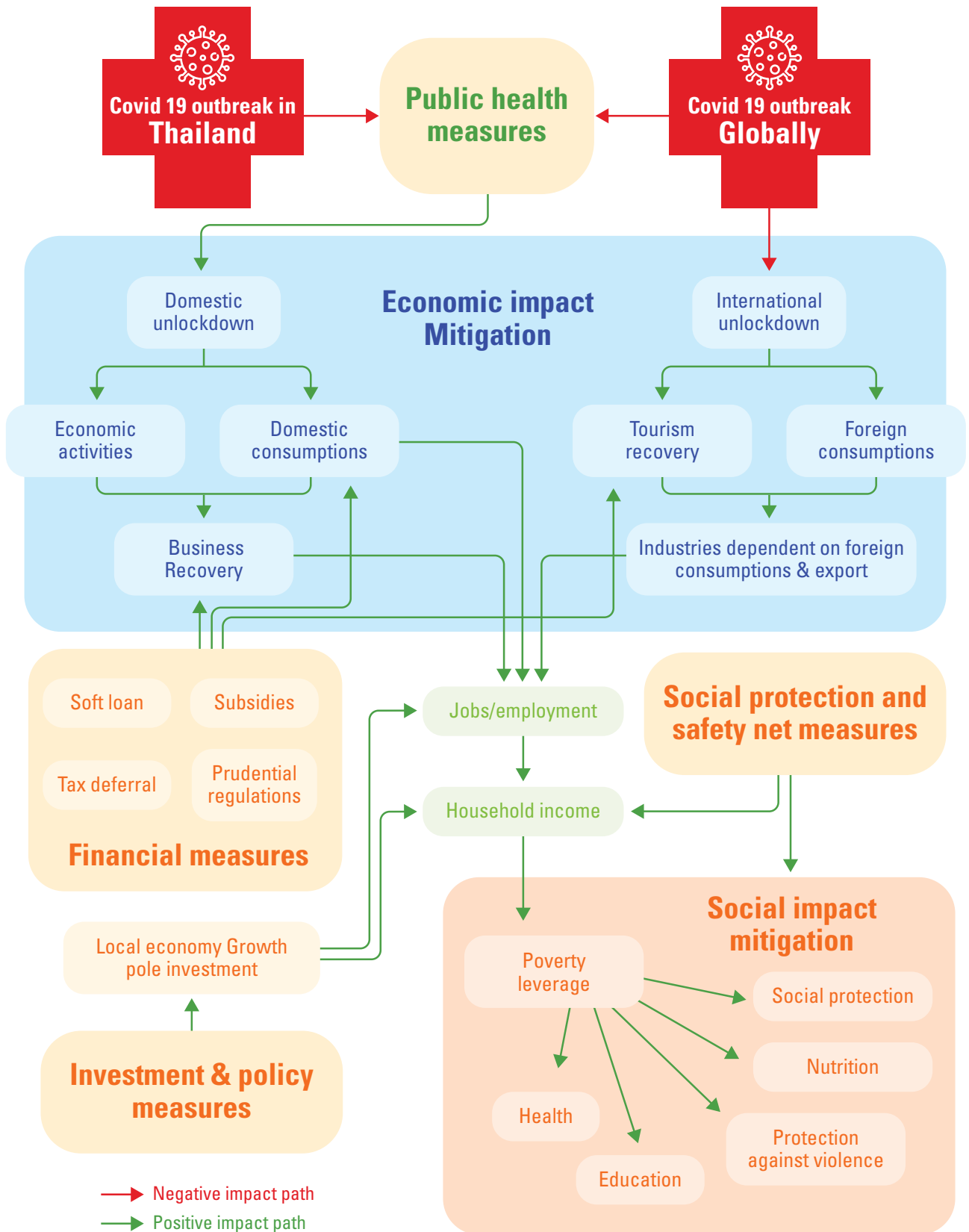
**Pillar 1: Stimulating the economy.** Ending the lockdown while managing health preparedness and capability of the health services to respond to further infection. Promote domestic consumption and government spending to support the economy.

**Pillar 2: Supporting business, jobs, and incomes.** Deepening financial measures to support the hardest-hit sectors where informal employment is high. Stimulate employment and support business to retain jobs through expanding the coverage and extension of financial measures.

**Pillar 3: Providing social protection for all, particularly for the most vulnerable groups.** Strengthen social protection and services particularly to the most vulnerable groups and integrating informal workers into the social security system.

**Pillar 4: Balancing between growth and resilience.** Introducing elements of a green recovery, inspired by the principles of the Sufficiency Economy Philosophy<sup>99</sup> of sustainability, inclusion, and empowerment, build back forward and greener. This will include the low carbon model of development, quality tourism, investment in modernizing social service deliveries, and decentralization for growth-pole development.

Figure 3: Impact Pathway Analysis Depicting Measures to Mitigate the Socio-Economic Impact



## Vulnerability of Thai Economy

**Budgetary and debt pressure.** The bailout has raised Thailand's public debt to its ceiling. The need to loosen fiscal constraints to cushion the shock is understandable: globally, countries are resorting to fiscal levers. The problem for Thailand is that the government has already incurred nearly 1.8 trillion baht of debt since 2014 and the bailout package will more than double the debt accrued during 2014-19. Government will seek to raise the ceiling on debt which is currently set at 60% of GDP.

**Growth engines.** Thailand's open economy relies heavily on external demand, particularly tourism and exports. Tourism accounts for nearly 22 % of GDP, about half of which is from foreign visitors, 30% of whom are Chinese. The impacts from the slump in tourism are found in many sectors. Much obviously depends on a vaccine or cure. In the meantime, there will be heavy reliance on domestic tourists. Exports have also been hit, although with forecasts suggesting recovery from the third quarter of 2020 onwards.

**Informal labour force and vulnerable employment.** Since more than half the labour force is informal and hence vulnerable, the shock is severe. Informal workers are not covered by social safety nets.

**Inequality.** There are concerns about persistent inequality in Thailand. The Global Wealth Report and Databook, published in December 2018 by Credit Suisse revealed that Thailand has the largest wealth gap in the world. The richest 1 % controls almost 67% of the country's wealth.<sup>100</sup> Income equality remains a significant issue,<sup>101</sup> with inequality founds in many forms.<sup>102</sup> Analysis by the Thailand Development Research Institute Foundation found that the gap is widening between the poor and the middle income, despite the Gini coefficient reducing in recent years.<sup>103</sup>

## Strength of Thai Society

**Healthcare.** Thailand is considered among the top 10 most prepared countries and ranks the first among all upper middle-income countries, based on the 2019 Global Health Security Index. Near universal health financing coverage allows the government to offer free COVID-19 tests and medical care, through the three major public health insurance schemes in the country, resulting in the absence of direct financial barriers to tests and healthcare access.<sup>104</sup>

Early in the outbreak, increased resources were provided to equip hospitals with medical facilities. Many field hospitals were set up to the point of oversupply given fewer infections than expected. The fact that there have been very few deaths demonstrates the strength and expertise of health personnel in giving medical care to patients once infected.

**Social capital.** The crisis has revealed the effectiveness of social capital in providing safety nets. With daily broadcast of cases that needed help, including hospitals and health personnel that reported shortage of equipment and supplies, donations were given both in-kind and in cash. This is the strength of Thai social capital.<sup>105</sup> Donation and assistance came from temples, non-government organizations, relief associations, civic groups, and individuals. The civil society movement has been effective in delivering social assistance to the needy and has provided a social safety net to vulnerable groups.

**Natural resources.** Closure of wildlife conservation areas and wildlife reserves provided a chance for nature to recuperate. There are reports of endangered species and animals seen in national parks and wildlife conservation

100 ASEAN Today, 2020, "Thailand's COVID-19 suicide crisis shows the cost of inequality"

101 OPM, Chapter 2, 2020

102 Forms of inequality include geographical disparity and social exclusion of marginalized people such as the stateless, migrant and domestic workers. The causes of inequality range from intergenerational inequality when rich-poor gaps transmit from generation to generation, disparity in education in both quality and the level completed, unequal access both to credit and the skills necessary for a modern economy, and legal discrimination.

103 TDRI, 2017

104 OPM, Chapter 3, 2020

105 TDRI suggests that Thai people donate over 70 billion baht a year. Thailand also ranks fourth on the World Giving Index, CAP's survey data from 2008-2018 showed that 71% of Thai people donated money in the past 30 days. OPM, Chapter 2, 2020



areas in both the seas and the forests around the country.<sup>106</sup> This demonstrates the richness of Thailand natural resources that recuperates quickly. The Thailand Development Research Institute Foundation suggests that post-COVID tourism should change emphasis from quantity to quality, paying more attention to the carrying capacity of natural resources.<sup>107</sup>

## Rethinking Post-COVID Development

**Shift to more independent economy: a balance between domestic vs foreign consumption.** The export-dependent nature of the Thai economy makes it vulnerable to shocks which have international impacts. Cyclical disruptions in the global economy accordingly bring risks. With each shock, including pandemics, disruption of transportation and supply chains can be expected. As the country relies heavily on exports and foreign tourists, it inevitably suffers blows from global shocks. Therefore, a long-term national strategy needs to take into consideration a greater balance between domestic and foreign consumption.

**Rebuilding local economy, agriculture, and agribusiness.** The pandemic may result in resort to the family farm for some of those losing urban jobs. There may therefore be some cushion from agriculture for the crisis. On the other hand, raising productivity in the agriculture sector and agribusiness is important for growth and rural wages. Keeping agribusiness alive and in a condition to prosper after the crisis is thus important.

**Shift toward a green economy.** The restoration of natural resources and environment because of the lockdown prompts realization that the economic growth has been traded off against natural resources and environment. Air pollution sharply reduced with the lockdown.<sup>108</sup> Lower economic activities, on the positive side, consume much less energy, and produce reduced greenhouse gas emissions since three-fourths of Thailand GHG emissions come from the energy and transport sectors.<sup>109,110</sup>

Recovery may thus need to trigger investment and behavioural changes that will include alignment with long-term GHG emission goals, factoring in resilience to climate impacts, slowing biodiversity loss and increasing circularity of supply chains. Central to this approach is a focus on well-being and inclusiveness. Sustainability and resilience go together. An economy which manages natural resources carefully can recover faster because resources are still intact.<sup>111</sup>

## Policy Recommendations

### 1. Short-term measures (within 6 months)

#### Key messages

In the short term, the priority is a balance between health and economic risks, while protecting the most vulnerable groups. The government should progressively lift restrictions and support businesses in recovery, thereby gradually returning jobs and working hours, and hence income to poor households.

106 Simachaya, 2020 *New Normal and Opportunity in Natural Resource and Environmental Management*. Bangkok: Thailand Environment Institute Sea lives particularly benefits from the lockdown and disruption of tourist business as water drainage from communities and hotels along the beach has substantially receded. This positively affects the sea quality, the growth of coral colony and sea grass, bringing in numerous and rare sea animals closer to the shore.

107 TDRI, 2020. "Turning COVID-19 Crisis into Opportunity to Restore Natural Resources in Tourist Attraction" (in Thai). In *TDRI Policy Series on Fighting Covid-19*.

108 The average level of PM 2.5 (particulate matter) was reduced by 22% in roadside areas of Bangkok, and 15% in air monitoring stations in areas between March and April. Open Development Thailand, Bangkok breathes cleaner air during COVID-19 pandemic, 2020

109 Thana Boonlert, 2020 "Striving for a Greener Future," Bangkok Post, June 1, 2020.

110 Thailand Greenhouse Gas Organization, 2020b Post Covid-19 Climate Action Strategy. Presentation. Microsoft Powerpoint File. Last modified August 15, 2020. Bangkok: Thailand Greenhouse Gas Organization.

111 OECD, 2020 "Building Back Better: A Sustainable, Resilient Recovery after COVID-19." *OECD Policy Response to Coronavirus*.

## 1.1 Public health measures

Public health measure is a key variable. If public panic and the spread of Covid-19 could be controlled by public health measures, economic impact would be mitigated.

**Fighting Covid-19 with knowledge and communication.** The key to bringing back domestic consumption and normal business is to gain trust in the preparedness and capability of the health services, knowledge, and capacity. The government should disclose data and information on current supply of health service and personnel capacity and conduct studies on how the infected cases have been handled. Modelling infection probability would help in making further decisions on public health measures. Thailand's success in minimizing death ratio should be analysed to provide more public understanding and reassurance that the pandemic could be managed. The knowledge of types of the viruses, how they spread, the speed, how to manage, are essential in fighting fear of the unknown. There is a strong expectation of a second wave. If it occurs, the public must be assured and have confidence that the health care service system has the readiness and capacity to cope.<sup>112</sup>

**Lifting the lockdown and restrictions while continuing prevention mechanisms and investing in testing and tracing system and medical facilities.** Public health measures result in business disruption with repercussions for employment. The Royal Thai Government has monitored and started relaxing restrictions gradually. While the timing of a vaccine is unknown, prevention includes adapting social behaviour, such as working from home, social distancing, frequent hand washing and wearing masks. The government should also fund testing and tracing methods and facilities to detect infection. Thailand's success has relied on public participation and this will continue to be the key to success in handling the second wave. Funding healthcare facilities would also assure the public of the preparedness and capacity of hospitals so that economic activities could resume.

## 1.2 Financial measures

**Focusing on support to real sector businesses.** Real sectors need public support to stay afloat and keep workers employed pending a recovery. Many are in trouble not because of economic fundamentals but because of the pandemic. Support to business accordingly has a greater role to play than in a 'normal' recession. To the extent that existing business relationships are still intact, the economy may be able to spring back once domestic and international restrictions are lifted. Support to businesses will limit the number of bankruptcies and so ready the economy for recovery. Support to businesses comprises ensuring sufficient cash flow, and enabling worker retention. EIU has reviewed financial instruments classified by degree of impact, time to impact, complexity, priority, and status of implementation as shown in Table 2 (Fiscal support) and Table 3 (Monetary support). In comparison to other ASEAN countries, Thailand has used most of the financial measures on the list. (See Table 1)

<sup>112</sup> The healthcare service system currently can accommodate 250 new infected cases per day or a maximum of 500 cases per day. (Hfocus,2020) It should also be noted that during the peak of infection, the number of new cases in Thailand has never exceeded 200.

Table 4: Comparing Fiscal and Monetary Policies taken by ASEAN Countries

Country	Fiscal stimulus packages								Monetary policies		
	Overall fiscal measures	Health system measures	Income support measures for individuals and household, excluding tax and contribution changes	Tax and contribution policy changes	Public sector subsidies to firms	Deferral of taxes and social security contributions and bringing forward expenditure within current fiscal year	Public sector loans or capital injections to firms	Loan guarantees by the state, benefiting private borrowers	Monetary policy	Prudential regulation	
<b>Brunei Darussalam</b>	✓	✓		✓	✓	✓	✓		✓	✓	
<b>Cambodia</b>	✓	✓	✓	✓	✓		✓		✓	✓	
<b>Indonesia</b>	✓	✓	✓	✓		✓			✓		
<b>Lao PDR</b>	✓	✓		✓		✓	✓		✓	✓	
<b>Malaysia</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
<b>Myanmar</b>	✓	✓	✓			✓	✓		✓	✓	
<b>Philippines</b>	✓	✓	✓		✓	✓	✓		✓	✓	
<b>Singapore</b>	✓	✓	✓		✓	✓	✓		✓		
<b>Thailand</b>	✓	✓	✓	✓	✓	✓	✓		✓	✓	
<b>Vietnam</b>	✓	✓	✓	✓	✓	✓	✓		✓	✓	

Source: OECD compilation, cited in EIU, 2020

Table 5: Fiscal and Financial Measures to Support Business

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Status and further options	Proposed duration	Priority level
<b>1.Ensuring sufficient cash flow and financial recovery</b>	Interest-free loans/ interest subsidies	This is applicable to loans targeting small businesses or businesses in the most affected sector; without interest or with subsidy	High	Short	Low	Implemented	Medium term	High
	Deferral of non-wage business payments	Payments may include items like rent	High	Short	Low	Not implemented	Short term	High
	Deferral of tax payments	This include corporate income tax payments, VAT, security contributions, deferring property taxes and additional time to file tax returns	High	Short	Low	Implemented	Short term	High
	Tax administration	Acceleration of tax refunds (VAT and other taxes), tax debt repayment plans	High	Medium	Medium	Implemented	-	Medium
	Non-tax waivers and deferrals	Waiver for the submission of financial statements, waiver for penalties for non-filing of tax returns	Medium	Short	Low	Implemented	Short term	High
	Tax waivers	Waivers related to social security benefits, property taxes, reduction of vehicle taxes, levies on tourism, airline companies etc and exempting some inputs from import taxes, waiver of penalties and interest for older tax debts	High	Short	Low	Implemented	Short term	High
	Tax credits	Issuance of tax credits to companies e.g. for retaining a high proportion of staff	High	Medium	Medium	Not implemented	Short term	Medium

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Status and further options	Proposed duration	Priority level
<b>2. Enabling worker retention</b>	Loan guarantees	Government guarantee on all or part of the value of loans granted to businesses, especially those in hard-hit sectors/for SMEs	High	Medium	Medium	Not implemented	Short term	Medium
	Unemployment benefits	Enhancing and expanding provision of benefits to those who are temporarily unemployed or working reduced hours	High	Short	Medium	Implemented	Medium term	High
	Wage subsidies	Supporting employers to pay their employees and supporting workers to ensure they continue to receive an income; for businesses and self-employed persons that have suspended or reduced operations	High	Short	Medium	Implemented	Medium term	High

**Table 6: Monetary Support to Business**

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
<b>Measures to manage liquidity and boost economic recovery and growth</b>	Policy/bank rates	Reduction of bank policy rate per annum	High	Medium	Low	Implemented	-	Medium
	Loan moratorium; loan restructuring	Moratorium on loan repayments for a defined period; interim suspension of all payments of obligations based on the loan (principal, interest, default interest, fees) as well as restructuring loans	High	Long	High	Implemented	Medium term	Medium
	Soft loans	Provision of soft loans by banks to financial institutions and enterprises	High	Short	Medium	Implemented	Medium term	High

Source: EIU, 2020

In the short and medium term, the government will need to create conditions for businesses to recover.<sup>113</sup> The primary concern would be to assist in providing access to liquidity for business operations to continue. Extensions and expansions to some of the measures already taken<sup>114</sup> could help solvent business survive and business operations can resume once trading conditions return to normal. Future interventions could be focused on the circumstances and needs of businesses in specific sectors as well as business types. However, financial precautions should be taken to prevent crisis in the financial sector that may follow if the financial system becomes overloaded with non-performing loans.

Tax-rate reductions, tax deferrals and a reduction of social contributions are ranked the best support measures from the government.<sup>115</sup> In addition, other ways of reducing operational costs including rent and utility costs and better loan terms are considered effective. UNIDO survey findings on firms' preferences matches results from a survey of SMEs conducted by the Federation of Thai Industries. This confirms understanding of firms' needs, particularly those of SMEs.

Other measures include extending the period of repayment for business loans in the short and medium term and suspension of tax audits for companies. Fiscal measures like tax or non-tax refunds can be more complex to implement, with a longer time to impact.

**Stimulating employment.** In the third quarter, poverty in Thailand is expected to increase as unemployment stays high and individuals still in work have lower income.<sup>116</sup> The ability of households to survive on savings is limited, with some 56% of the population having savings that would cover less than three months of consumption.<sup>117</sup> Protecting and stimulating employment will mitigate this.

Although lay-offs are not the priority for firms, wage and social security expenses are onerous in the current conditions. For staff on furlough, firms must pay social contributions for their staff at 30% of the former rate. Accordingly, wage subsidy schemes are being practiced internationally to sustain business, and keep people in jobs by lessening the cost of employment. In Singapore, the government has subsidized up to 75% of wages for 9 months. The self-employed in the UK can apply for a grant worth 80% of their average monthly profits, up to GBP 2,500, while salaried employees attract wage subsidies of 80%.<sup>118</sup>

Policies on employment which target SMEs, as well as businesses operating in sectors that have been worst affected by the pandemic, will be important (see Table 2). Measures to allow businesses to retain employees could include deepening the wage subsidies that have already been introduced. There is scope for expansion of coverage and extension for businesses and workers in sectors like tourism. Interest-free or subsidized loans for these sectors could also be extended in the medium-term. These policies are likely to have a high impact on businesses and labour despite being more complex to implement. Additional grants could also be considered specifically for businesses in sectors like tourism as well as continued provision of soft-loans.<sup>119</sup>

UNIDO suggests considering a wage subsidy of 60-80% of salaries for 6 months focused on micro-, small-, and medium- size firms. The wage subsidy could vary depending on type and size of firms. Another option is to allow employees to take furlough until demand and production recover. During the long leave, the government could consider subsidizing a reduced wage.<sup>120</sup>

113 EIU, 2020

114 Currently, measures that have been announced include liquidity provision of loans for SMEs, extension on tax filings for businesses, tax relief for debt restructuring, VAT refunds and import and custom duty exemptions.

115 UNIDO, 2020

116 OPM forecast model estimates that with continued unemployment and income reduction for many people, but no government handout, the poverty rate is expected to increase to 9% nationally, compared to 8% in Q2.

117 OPM, Chapter 2

118 UNIDO, 2020

119 EIU, Policy playbook, 2020

120 UNIDO,2020. In Germany the state is considering to subsidize two third of the wage.

To help businesses rehire workers after the pandemic has subsided, the government could prioritize tax cuts to encourage businesses to hire more employees, particularly in the hard-hit sectors.<sup>121</sup> Emergency loans and credit support will be also crucial to help mitigate the effects of the pandemic.<sup>122</sup> The government could also consider influencing businesses through incentives such as tax credit for retaining part of their staff or refunds for complying with tax obligations. This would help encourage employers to retain and recruit staff in the short to medium term.

Among the financial measures not yet implemented, the government may consider the policy options that have high impact and low complexity, such as, deferral on non-wage payments and loan guarantees (in addition to those provided by the Credit Guarantee Corporation).<sup>123</sup> In addition, the government could consider public work programmes to absorb labour in the short run.

**Support for households.** Targeted fiscal measures have been deployed to support those who have lost jobs because of the pandemic and to ensure that basic living standards are maintained.<sup>124</sup> In Thailand, the government provided emergency cash handouts and this has helped reduce falls in household income.<sup>125</sup> Cash handouts for workers are generous, providing 217% of the international poverty line and 76% of average consumption.<sup>126</sup> But the group that risks seeing the highest falls in income are the informally employed; their income had declined by over 50% before government handouts.<sup>127</sup>

The situation is expected to worsen in the third quarter after the cash handouts end in July 2020. Given high level of household indebtedness prior to the crisis, the household debt burden could increase among low-income households, agricultural families, and older persons. So far, measures to assist affected workers have included cash handouts, low-interest loans for individuals, extension on the filing of personal income tax returns as well as health insurance coverage increases. Future interventions could be focused towards considering the specific circumstances and needs of households, particularly the poor and vulnerable (See Table 4)

121 Tax cuts targeted at the worst-off (and boosts to unemployment benefit) would have had the second-highest impact on GDP (after government consumption), followed by the support offered to businesses.

122 The provision of loans to businesses has also been crucial so far and should continue to remain an important priority measure in the short to medium term.

123 <https://www.tcg.or.th/en/>

124 Ibid.

125 Overall household incomes fall by only 11% and barely increase at the national level. However, different population groups are affected differently. Workers in industry, tourism and other services see net drops in income and increases in poverty, while workers in agriculture see incomes rise by 53%. (OPM study assumes that agricultural households raise consumption in line with their marginal propensity to consume the additional income. Estimates of the impact of drought is not incorporated in this study)

126 The World Bank measures Thailand by the international poverty line for upper middle income countries: \$5.50/person/day, or 75.7 baht/person/day. The World Bank. 2018. *Poverty and shared Prosperity 2018*.

127 OPM, Chapter 2, 2020

Table 7: Financial Measures to Support Households

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
<b>1.Ensuring sufficient cash flow and financial recovery</b>	Cash transfers and benefits	Immediate financial support to the most vulnerable households targeted towards sick workers, temporarily unemployed workers, and the self-employed	High	Short	Medium	Implemented	Short term	High
	Deferral of tax payments	Personal income tax payments, deferring property taxes and additional time to file tax returns; tax payment deferral measures targeted at low-income households	High	Short	Low	Implemented	Short term	High
	Tax debt repayments	Allowing for more flexible arrangements for tax debt repayments (could be targeted towards lower income households)	High	Medium	Medium	Implemented	Short term	Medium
	Non-tax relaxations and deferrals	Early release of superannuation; allowing special withdrawals from the Employment Provident Fund, deferral of interest payments on mortgage debt	Medium	Medium	Low	Not implemented	Short term	High
<b>2.Expanding access to paid sick leave and unemployment benefits</b>	Relaxing restrictions and expanding access	Less restrictive access conditions, expanding eligibility, requirements for employers to provide sick leave, expanded unemployment benefits to workers in quarantine as well as workers in the informal sector and access to employment insurance	High	Medium	Medium	Implemented	Medium term	Medium

Source: EIU, 2020



In terms of impact on household liquidity, measures like waivers and deferrals (for both tax and non-tax related payments) could have a high impact, be easier to implement administratively (compared to tax refunds) with a shorter time to impact, and could benefit from potential extensions and expansions. Measures like special withdrawals and deferral of utility bills, for instance, could also be extended. Waivers for financial fees for domestic and international remittances could also be considered for migrant workers currently in Thailand. Direct cash handouts for a longer period as a support measure for low-income households could continue an important measure in the short term to compensate for lost incomes and livelihoods until sufficient jobs are created. This can ensure that a minimum standard of living can be maintained, especially for those in Thailand's large informal sector.<sup>128</sup> This, however, could cause debt pressure in terms of the government's tax ceiling..

Promoting domestic consumption. The pandemic affects foreign investment and foreign demand in Thailand. This suggest greater attention to domestic consumption in economic policy and increasing government spending on domestic products and services. To do so would require an adjustment in government procurement procedures and lift some rules relating to trade protection.

Private consumption could also have impact on GDP. Currently, domestic consumption accounts for approximately 50% of GDP.<sup>129</sup> Some government policies could impact domestic consumption through public procurement. The government has already tried to boost domestic tourism through cash incentives. More incentives through travel tax cuts and promotion to boost domestic demand and consumption in other sectors will help businesses get through the most difficult times.

Overall economic measures. Forecasts suggest that changes in Thailand's GDP are not particularly sensitive to the overall size of the stimulus package.<sup>130</sup> This suggests that the composition of the stimulus package is more important than its size, with government consumption spending likely to have the highest impact on GDP in Thailand. Higher government consumption spending in 2020 would not only support the economy that year but continue to boost GDP for several years thereafter. Cash handouts and tax cuts targeted at the worst-off (and boosts to unemployment benefit) would have the second-highest impact, followed by the support to business (aimed at keeping viable businesses alive). Interest rates cuts by the Bank of Thailand do not appear to boost GDP.<sup>131</sup>

128 Ibid.

129 Prasarn Triratworakul, interview, August, 2020

130 Assuming a best-case scenario, the size of the stimulus package is smaller by 5%, real GDP would contract 4.4% and the unemployment rate would average at 3.1% during 2020. Under the worst-case scenario, if the size of the stimulus package were smaller by 25%, real GDP in 2020 would contract by 4.7% and average unemployment rate would be 3.2%

131 The Bank of Thailand cut the policy rate from 1.25 to 0.5% during February-May 2020 continuing the monetary easing cycle that began in August 2019.

## 2. Medium term measures (6 months-2 years)

### Key messages

The medium-term focus should be on balancing between mitigating the impact on poverty and restructuring the economy, taking into consideration the limited budgetary resources.

### 2.1 Social Protection measures

**Improving social protection system to vulnerable groups.** The stimulus package has already used up most of the relief loan, leaving approximately only 166 billion baht unspent.<sup>132</sup> Accordingly, prioritization of future public support is essential.<sup>133</sup> This calls for a coherent system for managing information across programmes. The government should draw on the national ID system and strong information technology capacity and infrastructure to streamline and institutionalize management of social protection data across ministries. A more comprehensive and integrated management information system for social protection would enable the government to coordinate social protection support more efficiently, as well as to identify gaps in coverage.<sup>134</sup> A better employment database with details on varying status of employment and social security benefit received would also help in a better fit with workers in the informal sector and the unemployed. Likewise, consolidation of government data on the categories children in need of protection would help facilitate planning of risk prevention for children who are among the most vulnerable groups.

**Finding ways to cover the informal sector and migrant workers by social security.** The COVID-19 crisis has demonstrated the value of a strong contributory social insurance system, which automatically responds to buttress against a fall in welfare. However, it has also shown that a large segment of the working population is not covered, who therefore rely on ad hoc social assistance support.

Despite the challenges involved, there is a need to reconsider how to integrate the informal sector into the formal economy so that informal labour force can have social protection, the provision of which will come from taxes. One route to this is greater formalization of the economy, though this will take time. In the meantime, social insurance to cover the informal sector may be the only mechanism to provide social protection support to this segment of the labour force. Transitory migrants, who are a significant portion of the workforce and contribute to both local and national economies, should be incorporated into the contributory social insurance system, despite obvious political and practical difficulties in doing this. Further research is required in these areas.<sup>135</sup>

**Strengthening innovative mechanisms in social protection service delivery.** Social capital has been important in the outbreak. This implies a strength that the government could count on this in times when policy instruments and budget are limited. There are many civil society organizations in Thailand that focus on social welfare and well-being of the vulnerable.<sup>136</sup> Civil society organisations are effective in reaching out to pockets of poverty. The government could benefit from further collaborating with civil society organisations which could support reaching the poorest to ensure that government-funded social protection services cover the most vulnerable.

132 OPM, Chapter 2, 2020

133 EIU, Policy playbook, 2020

134 OPM, Chapter 2, 2020

135 Ibid.

136 In Bangkok alone there are 282 organization registered as foundation or association for public welfare. BMA, Social Development Division, 2019

While the integrated information system on social protection across ministries may take time to establish, local administrative office could serve as a mechanism to identify and verify target groups, especially the neediest. A database compiled by local administrative offices could serve the purpose of delivering services to target groups.

## 2.2 Restructuring the economy with technology and innovation

**Investing in advanced technology to transform industries.** The COVID-19 crisis calls for structural transformation of manufacturing which will be more digitized, circular, and resilient. The fourth industrial revolution will be a defining factor, helping industry to return to operations as soon as possible and providing the platform to develop new, more resilient operations, value chains and businesses.<sup>137</sup> The demand for digitization and advanced technologies such as artificial intelligence, robotics, and the *Internet of Things*, has been accelerated as industries adjust to survive the crisis.

**Boosting local economy with technology and innovations.** During the lockdown, online marketplaces and delivery logistics emerged and prospered. Online shopping grew and there are some indications of increased petty trading as a necessity entrepreneurship. Digital market platforms could further facilitate trade transactions with less risk of physical contact than in the physical marketplace, as well as providing an opportunity for producers and consumers to have direct contact. As Thailand has an advantage of high internet penetration (71%), the digital platform becomes an opportunity for the educated labour force who may be laid off from work to do business and earn income. Investment in digital infrastructure, connectivity, technology as well as digital literacy will greatly benefit local entrepreneurs, SMEs, as well as those who must become self-employed after being laid off from firms.

The government should also invest in and mobilise universities to work with local communities and small businesses in providing technology and innovations for promoting the local economy, with a focus on young people. This could utilise the existing science parks, test labs, and innovation incubators. This would have the benefits of providing job opportunities for the new graduate batch coming into the shrinking labour market, while boosting the local economy and paving ways to innovation-driven growth.

## 3. Long term (2-5 years)

### Key messages

The long-term goal is to shift the course of development towards a more independent, resilient, inclusive, and green economy.

### 3.1 Shifting towards a more independent and green economy

**Better balance between reliance on foreign consumption and domestic consumption.** In an international pandemic, Thailand's heavy reliance on export and inbound tourism has led to a stronger shock than for economies less dependent of foreign consumption. The shock from the pandemic has caused many countries, including Thailand, to look at ways of minimising risks from supply chain disruption and over-dependency on foreign trade, investment and consumption. These ideas are a preliminary stage and await full evaluation. Forward-looking policies could be deployed to invest in infrastructure as well as to build supply chain networks to be better-prepared to deal with outbreaks and similar disruptions in the future.<sup>138</sup>

137 UNIDO, 2020

138 EIU, 2020

**Quality over quantity tourism for a green economy.** Businesses in sectors like tourism could continue to be treated as priority sectors for continued lending and financial support to build a stronger and more resilient economy over a longer duration. Increased subsidies and longer periods of support especially for sub-sectors like aviation and tourism services and operations, that have been hit particularly hard by the loss of international tourists may be considered.<sup>139</sup>

Pre-COVID, tourism in Thailand enjoyed the quantity of tourists at the expense of the natural resources. During the lockdown, the recuperation of natural resources, beach and sea lives has been obvious and will prompt ideas of tourism that puts more emphasis on quality. Carrying capacity for tourism is a key issue.

In the long term, Thailand could also consider investment into smarter and more sustainable infrastructure (including low carbon transportation) to boost tourism through partnerships between the public and private sectors while also taking steps towards protecting the environment and natural resources. This could contribute towards Thailand's vision to strengthen the country as a "quality" tourist destination.

**Medical and wellness hub of the region.** Given the strength of the Thai medical and wellness industry, patients from neighbouring countries may continue to seek medical treatment in Thailand once border restrictions are eased. Restrictions may only serve to reduce demand in the short term. This could serve as a continued priority area in the future and the focus could be on attracting investment into the sector to boost growth and resilience. There is also scope for Thailand to capitalize on foreign companies seeking locations for medical supplies production.<sup>140</sup>

The effectiveness of Thai medical and health service system during the fight with COVID-19 is well-recognized.<sup>141</sup> This is an opportunity for Thailand to export consultation and assistance in designing robust healthcare systems in neighbouring countries, as well as attracting foreign investment in medical and healthcare infrastructure in the region.

**Regional logistics.** Robust supply chains offer a chance to be better prepared to deal with outbreaks and similar disruptions in the future. A regional logistic hub connecting mainland southeast Asia to China and India could be considered as global supply chains may shift towards regionalization.<sup>142</sup> Feasibility analysis would be necessary.

**Low-carbon model of development.** In line with the UN Secretary's six climate-positive actions for governments to building back their economies and societies, Thailand should take this opportunity to support clean, green transition to recovery.<sup>143</sup> Measures could include reinforcing laws to protect the coasts and seas against overuse, encouraging working from home, supporting phase-out of fossil fuels, supporting green jobs and encouraging investments in green, liveable cities.

### 3.2 Building a resilient economy

Thailand has upheld the Sufficiency Economy Philosophy as the guiding principle for leading lives and business operations for the past two decades. This has contributed to mitigating the impact of previous economic crises, particularly for those in the agricultural sector. Core principles of Sufficiency Economy Philosophy, such as sustainability, inclusion, and empowerment, are pertinent in building forward better and greener.

Building resilience requires a strong foundation based on decentralization and de-concentration of growth. The challenge lies in the centralized structure of the Thai economy. Thailand's administrative structure, public investment, and job opportunities have long centred on Bangkok and a few cities upcountry. While acknowledging that seeking to 'spread-out growth' may lessen growth rates, stronger growth outside Bangkok could nonetheless be beneficial.

139 Ibid.

140 Ibid.

141 Thailand ranks 6th in the Global Health Security index, which track 6 key factors: prevention, detection and reporting, rapid response, health system, compliance with global norms, and risk environment

142 Cordon and Buatois, 2020

143 Thailand Greenhouse Gas Organization, 2020a

**Decentralization and revival the concept of growth poles.**

Thailand's long-term National Strategy has already addressed the need to decentralize and revive the concept of growth poles development.<sup>144</sup> Approximately 20 growth pole cities and medium-sized towns have been specified, considering geography, population size, and existing infrastructure. This includes plans to create green and liveable cities, reduce inequality, and build quality of life. The government may need to re-prioritize those plans to build resilience, in partnership with the National Charter movement.<sup>145</sup>

Investing in logistics and digital infrastructure in those cities could also contribute to the

GDP as it will create jobs and stimulate the economy, too. Government policies to invest in infrastructure supportive of a green economy and liveability could generate jobs. They could also yield economic, social and environmental benefits - building on the goals of Thailand 4.0.<sup>146</sup>



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**Local economy and agricultural sector.** The rural economy is receiving substantial support through the stimulus package in the form of projects that create jobs, build local infrastructure, and strengthen local communities. More could be done to support the local economy and the agricultural sector. This includes mechanisation which will raise labour productivity and hence rural wages, so contributing to SDG 2 targets. Land reform, sustainable water management and market development will also be contributory.

**Focusing on SMEs resilience through technology adoption and digitalization.** Policies could also be directed towards improving overall resilience of SMEs, such as through the adoption of technology and expanded digitalization. To bridge inequality, policies that target smaller businesses (including the self-employed and entrepreneurs) could likely continue for a longer duration. Thailand has already been shifting from a manufacturing to a high technology economy and it will remain important to support SMEs to innovate and strengthen capacity and capability through the adoption of advanced technology. This will help to contribute to a strong economy and enhance national competitiveness for Thailand in the region and globally.<sup>147</sup>

### 3.3 Moving towards an Inclusive Society

In the effort to fight COVID-19, it is important to address the poor and vulnerable. Social safety nets and social protection for the poor are important. Ensuring jobs and hence income so that household can stay on their feet is the best safety net. However, there are those who are disabled or vulnerable who need social protection.

**Expansion and reform of social protection systems:** The fiscal and monetary measures deployed will have helped to alleviate some of the immediate economic concerns for vulnerable populations. Thailand could nonetheless benefit from a longer term view to strengthening communities in order to make them more economically and socially resilient to disruptions in the future.<sup>148</sup> Community empowerment is an instrument to mobilize local partners in providing social assistance, protection and safety net, utilizing the strength of Thai social capital to take care of the most needy group. This could include strengthening their communal learning and decision making, supporting community actions particularly concerning community welfare.

144 NESDB, 2018

145 The National Charter movement is a civic movement initiated by local groups, businessmen, civil society, coming together to form a participatory resolution on the direction of development for each province. It is like a social contract.

146 EIU, 2020

147 Ibid.

148 Ibid.

**Reinforce the protection system against violence, exploitation, and abuse to support vulnerable population, particularly women and children at risk of violence and address cases of abuse.**

To address the gaps in current systems, the monitoring and analysis of violence, exploitation, abuse and neglect should be enhanced, including through consolidation of government administrative data of various ministries to facilitate planning of risk prevention. The government should build on the inter-ministerial collaboration that emerged during COVID-19 to develop a common vision of the next version of the protection system that would enable the government to deliver with increasing consistency and quality for the population in need of protection. It is important to empower local administrative organizations to provide agreed protection services in their areas. Local officers who are more familiar with households can increase the convenience and speed of operations and encourage high levels of reporting. Better understanding of local contexts and situations would also lead to improved surveillance activities to promote awareness about child.

**Reskilling and upskilling of workers with a focus on the knowledge economy and skills for the future.**

Thailand could consider policy measures on human capital development, to prepare children and skill them up to respond to the need of tomorrow's economy. This will need education reform and reskilling or upskilling for the unemployed. Targeted efforts and policies focusing on the knowledge economy and skills in the digital and technology space will be beneficial across all sectors. These needs were apparent before the pandemic but have been brought into sharper focus by the pandemic.

**Embracing schools to become better prepared, with a pro-equity focus.**

Thai education system needs to focus on preventing COVID-related dropout. Measures include mechanisms to monitor early signs of student dropout, and to identify areas where the problem is likely to be more severe, as well as provision of financial or in-kind support. The government should adopt a pro-equity focus that takes into account: 1) tracking needs of struggling provinces and vulnerable groups; 2) assessment of socio-economic impact on children and households (access to school meals, counselling services for at risk children, academic support); and 3) access to hardware, software, and affordable connectivity. Targeting would focus on the poorest, children with special education needs and disabilities, and ethno-linguistic minorities and migrant children.<sup>149</sup>

The education sector should capitalize on the increased interest in remote learning to improve future outcomes through development of a digital strategy on technology in classrooms and homes. This includes investing in digital infrastructure for schools, support and upgrade teacher capacities, designing a communication platform to exchange directly with teachers, staffs, students and parents; developing guidelines and protocols for school safety and preparedness to ensure health and well-being of learners and teachers; and investing in digital infrastructure and technologies for equitable education and distance learning.<sup>150</sup>

Despite emerging fiscal constraints, there is a case to ensure that education financing avoids a lost generation of students, especially who will be called upon to pay the debt that the country is incurring to finance the fight against the pandemic and its economic consequences; and build long-term resilience of system, schools, and students in Thailand.

**Ensuring regional cooperation and partnerships towards meeting the SDG targets.**

In response to the outbreak so far, most countries have been looking inward to implement policies to ease the immediate impact of the crisis on their own economy and populations. In Thailand, there is also a threat that domestic resources could be drained and diverted away from targeted financing of the SDGs due to the volume of the fiscal packages and aid currently being provided. Regional cooperation could enable countries to work across borders to share lessons learned and best practices in containing the outbreak, mitigating the economic impact on business and the poor, as well as selecting appropriate s to counter the effects of the pandemic and stimulate growth over the next few years.<sup>151</sup> Partnership between ASEAN countries offers the chance for faster recovery.

149 UNESCO-UNICEF, 2020

150 UNESCO-UNICEF, 2020

151 EIU, 2020

# Annex: A

## Data Support for Social Impact Assessment

**Table 8: Social Protection Programmes in Thailand**

Type of scheme	Programme	Lead agency	Benefits	Eligibility	Coverage
Social assistance	Child Support Grant	MSDHS	THB 600 per month (US\$ 20)	Children 0–6 years <sup>1</sup> Yearly income < THB 100,000 household per member Community validation	700,000 children in 2019 <sup>2</sup> (women are selected as recipients)
Social assistance	Social Pension	Ministry of Social Development and Human Security	Between THB 600 (US\$ 20) and THB 1,000 (US\$ 33) per month	Universal	8,408,498 people
Social assistance	Disability Grant	MSDHS	NA	Universal	1,607,505 people
Social assistance	Social Welfare Card	Ministry of Finance	Between THB 200 (US\$ 7) and THB 300 (US\$ 10) per month Transport and gas subsidies	Individual annual income < THB 100,000 (US\$ 3,333) Other requirements in terms of land use and housing	14.6 million people in 2019
Social assistance	School meals	Ministry of Education and Local Administration	School lunch	Universal	About 1.8 million primary school children and nearly 700,000 kindergarten children
Social insurance	Social Security Fund	Ministry of Labour	Sickness Maternity Invalidity Death Child Allowance/ Old Age Benefits Unemployment	Contributory Three different groups: Compulsory Insurance Scheme Voluntary Insurance Scheme #1 (Article 39) Voluntary Insurance Scheme #2 (Article 40) – informal sector	471,406 enterprises 15,994,591 insured people Unemployment benefit – 140,000 Old-age pension – 440,000 Child allowance – 1.3 million
Social insurance	Workers Compensation Fund	Ministry of Labour	Medical service Monthly cash compensations Funeral grant Rehabilitation service	Contributory	396,394 enterprises 10,537,238 employees
Other	Universal health coverage	Ministry of Public Health	Covers a pre-defined set of medical treatments and expenses	Universal	48.3 million

Notes: (1) Child Support Grant extended from 3 years to 6 years old by Cabinet Resolution on 26 March 2019; (2) CSG estimate comes from UN paper

**Table 9: Thailand Social Protection Benefits and Adequacy**

Policies	Benefits	Adequacy (ratio of benefit to...)	
		International poverty line (upper middle-income): 2,303.45 THB/person/mo.	Average consumption expenditure of Thai population: 7,470 THB/person/mo.
Social assistance			
CSG	600	26%	9%
Old-Age Allowance			
1. Aged 60–69	600	26%	9%
2. Aged 70–79	700	30%	11%
3. Aged 80–89	800	35%	12%
4. Aged >=90	1,000	43%	15%
Disability Grant	800	35%	12%
SSF			
<b>Section 33</b>			
1. Child Allowance (1 child)	600	26%	9%
2. Retirement – monthly allowance pension (contribute more than 15 years)			
2.1 Case 1: Contribute 15 years and C income in the last 5 years is THB 15,000	3,000	130%	46%
2.2 Case 2: Contribute 15 yrs and average income in the last 5 years is THB 6,600	1,320	57%	20%
2.3 Case 3: Contribute 30 yrs and average income in the last 5 years is THB 15,000	6,375	277%	97%
2.4 Case 4: Contribute 30 years and avg income in the last 5 years is THB 6,600	2,805	122%	43%
3. Retirement – one-time payment pension (contribute more than 1 year)			
3.1 Case 1: Contribute based on THB 15,000 salary for 14 years	1,543	67%	23%
3.2 Case 2: Contribute based on THB 6,600 salary for 14 years	679	29%	10%
4. Sickness (Income compensation)			
4.1 Case 1: Salary THB 15,000/month. (leave more than 30 days)	7,500	326%	114%
4.2 Case 2: Salary THB 6,600/month. (leave more than 30 days)	3,300	143%	50%
5. Unemployment benefit (Only for Section 33)			
5.1 Job loss; Case 1: Salary THB 15,000/month.)	7,500	326%	114%
5.2 Job loss; Case 2: Salary THB 6,600/month.)	3,300	143%	50%
5.3 Resignation; Case 1: Salary THB 15,000/month.)	4,500	195%	69%
5.4 Resignation; Case 2: Salary THB 6,600/month.)	1,980	86%	30%



Policies	Benefits	Adequacy (ratio of benefit to...)	
		International poverty line (upper middle-income): 2,303.45 THB/person/mo.	Average consumption expenditure of Thai population: 7,470 THB/person/mo.
6. Disability insurance			
6.1 Case 1: Salary THB 15,000/month. and have severe disability	7,500	326%	114%
6.2 Case 2: Salary THB 6,600/month. and have severe disability	3,300	143%	50%
6.3 Case 1: Salary THB 15,000/month. and have non- severe disability	4,500	195%	69%
6.4 Case 2: Salary THB 6,600/month. and have non- severe disability	1,980	86%	30%
<b>Section 39</b>			
1. Child Allowance	600	26%	9%
2. Retirement – monthly allowance pension (Contribute more than 15 years)			
2.1 Case 1: Contribute 15 years and leave Section 33 for longer than 5 years	960	42%	15%
2.2 Case 2: Contribute 30 years and leave Section 33 for longer than 5 years	2,040	89%	31%
3. Retirement – One-time payment pension (Contribute more than 1 year)			
3.1 Case 1: Contribute based on THB 4,800 salary for 14 years	444	19%	7%
4. Sickness (income compensation)			
4.1 Case 1: Salary THB 4,800/month. (leave more than 30 days)	2,400	104%	37%
5. Disability			
5.1 Case 1: Salary THB 4,800/month.	2,400	104%	37%
5.2 Case 2: Salary THB 4,800/month.	1,440	63%	22%
<b>Section 40</b>			
1. Child Allowance (only contribute THB 300)	200	9%	3%
2. Retirement – one-time payment pension (Contribute more than 1 yr)			0%
2.1 Case 1: Contribute THB 100 for 14 years	51	2%	1%
2.2 Case 2: Contribute THB 300 for 14 years	196	9%	3%
2.3 Case 1: Contribute THB 100 for 30 years	174	8%	3%
2.4 Case 2: Contribute THB 300 for 30 years	565	25%	9%
3. Sickness (income compensation)			0%
3.1 Case 1: (Contribute THB 100) IPD	9,000	391%	137%
3.2 Case 2: (Contribute THB 100) OPD	6,000	260%	91%

Policies	Benefits	Adequacy (ratio of benefit to...)	
		International poverty line (upper middle-income): 2,303.45 THB/person/mo.	Average consumption expenditure of Thai population: 7,470 THB/person/mo.
3.3 Case 1: (Contribute THB 300) IPD	9,000	391%	137%
3.4 Case 2: (Contribute THB 300) OPD	6,000	260%	91%
<b>4. Disability</b>			
4.1 Case 1: Contribute THB 100 for 6 months in 10 months	500	22%	8%
4.2 Case 2: Contribute THB 100 for 12 months in 20 months	650	28%	10%
4.3 Case 3: Contribute THB 100 for 24 months in 40 months	800	35%	12%
4.4 Case 4: Contribute THB 100 for 36 months in 60 months	1,000	43%	15%
4.5 Case 1: Contribute THB 300 for 6 months in 10 months	500	22%	8%
4.6 Case 2: Contribute THB 300 for 12 months in 20 months	650	28%	10%
4.7 Case 3: Contribute THB 300 for 24 months in 40 months	800	35%	12%
4.8 Case 4: Contribute THB 300 for 36 months in 60 months	1,000	43%	15%
<b>COVID-19 social protection</b>			
THB 5,000 for 3 months (temporary workers/freelancers not in Social Security Fund)	5,000	217%	76%
THB 5,000 for 3 months (registered farmers not under other protection programmes)	5,000	217%	76%
Disability Grant	1,000	43%	15%
<b>SSF – Section 33</b>			
1. Job suspension; Case 1: Salary THB 15,000/month.	9,300	404%	142%
2. Job suspension; Case 2: Salary THB 6,600/mo.	4,092	178%	62%
3. Resignation; Case 1: Salary THB 15,000/mo.	6,750	293%	103%
4. Resignation; Case 2: Salary THB 6,600/mo.	2,970	129%	45%
5. Job loss; Case 1: Salary THB 15,000/mo.	10,500	456%	160%
6. Job loss; Case 2: Salary THB 6,600/mo.	4,620	201%	70%

Source : OPM report

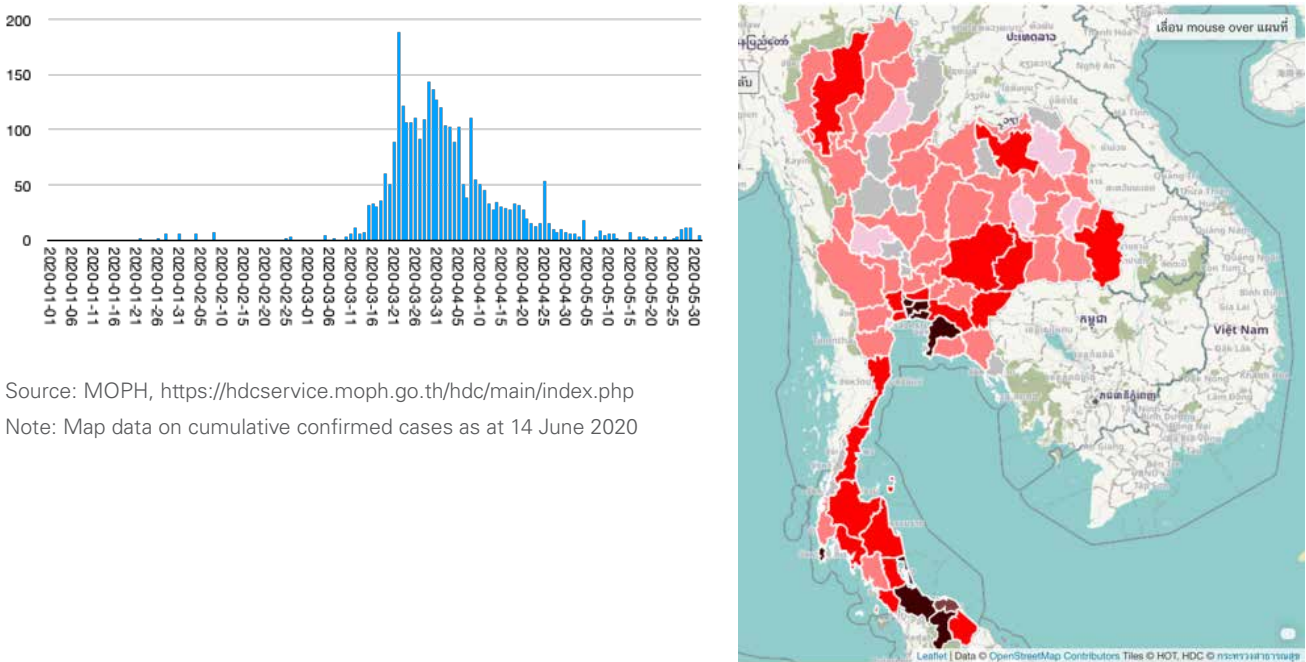
## Reference on Health issue<sup>152</sup>

### Thailand response to contain Covid-19

Thailand may not have been the first country to have a COVID-19 patient, but it was the first country to report a confirmed COVID-19 case, on 12 January 2020. The surveillance and containment system operated well in the first few weeks, with good collaboration across sectors and active community contact tracing to prevent extensive transmission. Thailand was the only middle-income country listed in the global top 10 of countries for pandemic preparedness in the Global Health Security index. The Ministry of Public Health, and especially the Department of Disease Control, used the the surveillance and response system for emerging infectious diseases. It also has significant experience of fighting other EIDs, such as SARS and bird flu.

The outbreak expanded, in both number and geographical spread, in early March 2020– mostly linked to entertainment venues in Bangkok, including a major boxing event and a religious pilgrimage in the south of Thailand. A peak of 188 confirmed cases was reported in one day. More cases outside Bangkok were reported following movement of workers to the countryside. The situation was later contained, after strong community-based contact tracing and quarantine, plus additional public health measures such as movement control and partial lockdowns following the announcement of a state of emergency on 26 March 2020. Within two months the pandemic has been contained.

**Figure 4: Number of Daily Confirmed COVID-19 Cases and Their Geographical Spread**



Source: MOPH, <https://hdcservice.moph.go.th/hdc/main/index.php>  
 Note: Map data on cumulative confirmed cases as at 14 June 2020

**Reference on Education Issue**

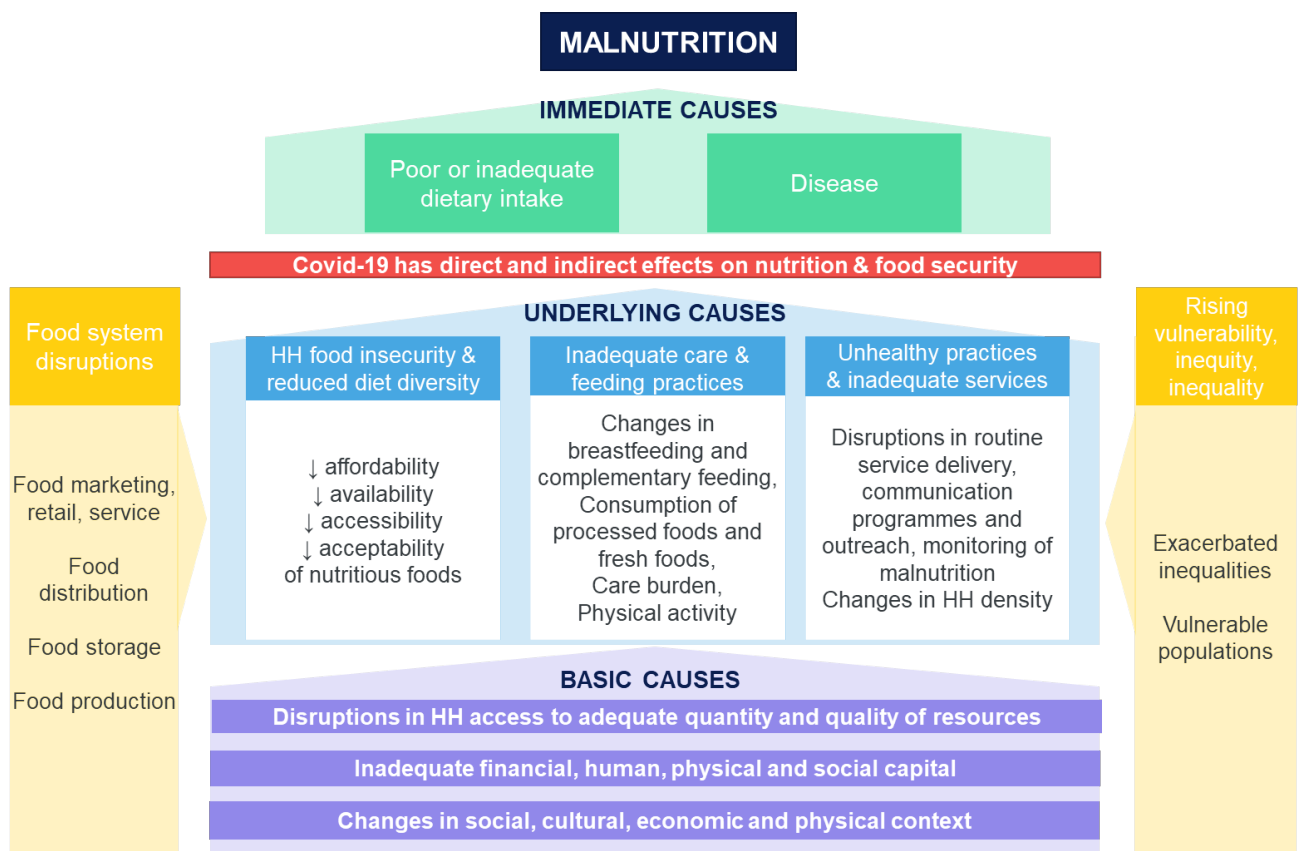
**Table 10: Ministry of Education School Closure Response Timeline**

Phase	Dates	Key activities
Preparation for remote learning	7 April – 17 May 2020	<ul style="list-style-type: none"> <li>Remote learning materials prepared</li> <li>Surveys on students, parents’ and teachers’ readiness for remote schooling</li> </ul>
Experiment/trial period for remote learning	18 May – 30 June 2020	<ul style="list-style-type: none"> <li>Remote learning materials publicly available to all</li> <li>Feedback from students,parents and teachers on remote learning materials</li> </ul>
Academic year	First semester: 1 July – 30 Nov 2020 Second semester: 1 Dec 2020 – 9 April 2021	<ul style="list-style-type: none"> <li>Formal teaching (remote, onsite, or blended depending on the COVID-19 lockdown status)</li> </ul>
Examination period	1 April – 15 May 2021	<ul style="list-style-type: none"> <li>O-NET/GAT-PAT examinations</li> </ul>

Source : OPM Chapter 4

**Reference on Food and Nutrition**

**Figure 5: Framework Visualising Impacts of the COVID-19 Shock on Malnutrition**



Source: Adapted from Colie and Huestis (2020) 'MQSUN+ framework', HH = Household, cited in OPM, Chapter 4

# Annex: B

## Data Support on SDG Progress

**Figure 6: Snapshot of Thailand for 2019-2020**

The length of each bar shows progress in each of the 17 goals since 2000. If a bar reaches or crosses the 2019 line, the country has made the expected progress to date. However, whether a goal can be achieved by 2030 depends not only on the distance traveled so far, but also on the pace of progress going forward, as reflected in the Snapshot below.



Source : UNESCAP, SDG Progress Assessment, Thailand 2019-2020, 2020

**SDG 1 No poverty****Table 11: SDG 1.3 Indicators for Thailand**

	%
Percentage of persons above statutory retirement age receiving old-age pension	83.0
Percentage of working-age population contributing to the pension system	31.9
Percentage of persons with severe disabilities receiving disability cash benefits	35.7
Percentage of unemployed persons receiving unemployment cash benefits	43.2
Percentage of women giving birth receiving cash maternity benefits	40.2
Percentage of persons covered in the event of work injury	41.0
Percentage of children/households with children receiving child or family cash benefits	18.9

Source: World Social Protection Report 2017 (ILO, 2017), cited in OPM, Chapter 2

**SDG2 No hunger****Table 12: Nutrition and Food Security Indicators in Thailand**

Nutrition indicator	Year	National average	Target (2025)
Wasting (% of children under five)	2016	5.4	5
Stunting (% of children under five)	2016	10.5	5
Overweight (% of children under five)	2016	8.2	8
Overweight (% of children 5–19)	2014	13.9	-
Normal BMI (% of adults)	2018	52.8	55
Exclusive breastfeeding (%)	2016	23.1	50
Anaemia in women of reproductive age (%)	2016	31.8	Reduction by 50%
Anaemia in pregnant women (%)	2016	40.2	-
Undernourishment (%)	2017	7.8	-

Sources: National Statistical Office and UNICEF (2017), FAOSTAT 2018, Development Initiatives (2020), National Nutrition Action Plan 2018–2022 and National Health Examination Survey 2014, cited in OPM, Chapter 5

### SDG 3 Good health and well-being

Indicators of effective health service coverage in the four main areas shown in Table 6 are quite high, except for tuberculosis treatment. The coverage of eight out of the nine key maternal neonatal and child health intervention dimensions is high, except for the early initiation of breastfeeding.<sup>153</sup> However, performance on non-communicable diseases and injuries from road and traffic accidents is still lagging and there are still challenges in reaching targets related to unwanted pregnancies, abortion, and sexually transmitted diseases. An assessment of the health-related SDGs in 2017 ranked Thailand at number 112 of 188 countries, and number 6 among all ASEAN countries.<sup>154</sup> The ranking was partly influenced by the suffering cause by the major flood disaster in 2013, the use of unclean water, and interpersonal violence.<sup>155</sup>

**Table 13: 2019 SDG 3.8 Effective Health Coverage Profile for Thailand**

Reproductive, maternal, new-born, and child health		Infectious diseases	
Family planning coverage	89%	Tuberculosis (effective coverage)	61%
Pregnancy and delivery care	95%	HIV antiretroviral therapy coverage	72%
Child immunisation coverage (DTP#)	99%	Insecticide – treated bed nets coverage for malaria prevention	100%
Care-seeking behaviour for suspected pneumonia	80%	Access to basic sanitation	95%
Non-communicable diseases		Service capacity and health security	
Prevalence of normal fasting glucose level	98%	Density of hospital beds	100%
(% of global threshold)	100%	Health worker density (% of global threshold)	86%
Prevalence of normal blood pressure	78%	Health worker density	79%
(% of global threshold)	86%		
Tobacco non-use	73%	International health regulations (IHR) compliance	79%

Source: WHO SEARO, 2019, cited in OPM, Chapter 3

Table 6 shows for each target, the contributing factors related to COVID-19 that will affect progress, both the positively and negatively. In addition, evidence from the past few months on specific indicators is presented to indicate a potential direction of the impacts. The last column shows potential vulnerable populations specific to each target.<sup>156</sup>

153 Tangcharoensathien et al., 2020, cited in OPM, Chapter 3

154 Lim et al., 2017, cited in OPM, Chapter 3

155 IPSR, 2017, cited in OPM, Chapter 3

156 OPM, Chapter 3

Table 14: SDG 3 (Health) Targets – Potential Influencing Factors Related to COVID-19, and Early Evidence on the Impacts

	SDG 3 targets	Positive contributing factors	Negative contributing factors	Early evidence	Vulnerable populations
Health Risks	3.5 Alcohol and substance abuse	<ul style="list-style-type: none"> <li>Alcohol sales ban</li> <li>Lower income</li> </ul>	<ul style="list-style-type: none"> <li>Stress and anxiety from disease and economic and social impacts</li> </ul>	<ul style="list-style-type: none"> <li>Online survey on alcohol consumption shows 78.07% drink less, 17.28% same, and 4.65% drink more</li> <li>Alcohol sales down 41% in April and 50% in May</li> </ul>	Poor, alcohol dependent, mental disorders
	3.a Tobacco	<ul style="list-style-type: none"> <li>Lower income</li> </ul>	<ul style="list-style-type: none"> <li>Stress and anxiety from disease and economic and social impacts</li> </ul>	<ul style="list-style-type: none"> <li>Increased online promotion and sales of tobacco products, including e-cigarettes</li> <li>Online survey on the frequency of smoking shows 46.31% same, 37.66% smoking less, 16.03% smoking more</li> </ul>	Poor
	3.9 Pollution, sanitation	<ul style="list-style-type: none"> <li>Travel control, less traffic</li> <li>Business/factory closure</li> </ul>	<ul style="list-style-type: none"> <li>More waste from delivery/takeaway</li> </ul>	<ul style="list-style-type: none"> <li>Fine particulate matter (PM2.5) level reduced by 20%</li> <li>Plastic and paper waste increased by 15%</li> </ul>	Poor
	3.6 Traffic accidents	<ul style="list-style-type: none"> <li>Travel control</li> <li>Lower alcohol consumption</li> <li>Fewer car sales</li> </ul>	<ul style="list-style-type: none"> <li>Traffic accidents decreased by 60.8%</li> <li>Traffic related injuries reduced by 63.4%</li> <li>Traffic related deaths down by 56.7%</li> </ul>		
	3.4 Non-communicable diseases and mental health	<ul style="list-style-type: none"> <li>Lower alcohol consumption from sale ban</li> </ul>	<ul style="list-style-type: none"> <li>Stress and anxiety from disease and economic and social impacts</li> <li>Service disruption: special clinics</li> <li>Less physical activity</li> </ul>	<ul style="list-style-type: none"> <li>Q1 suicide increase 14% year on year</li> <li>Lower utilisation of mental health facilities</li> <li>Two-thirds increase in number of calls to mental health hotline</li> <li>Proportion with adequate physical activity declined by 11.6% in March, over 40% of diabetes patients reported lower physical activity or walking less compared to pre-COVID-19 period</li> <li>Around one in seven diabetes or hypertension patients monitored their blood sugar or blood pressure less</li> <li>Longer drug dispensing period for uncomplicated cases</li> </ul>	Elderly, urban poor, unemployed, MSM/TG, migrants, ethnic minorities
Diseases and Health Outcomes	3.7 Reproductive health, adolescents, birth	<ul style="list-style-type: none"> <li>School closure / movement control</li> </ul>	<ul style="list-style-type: none"> <li>Service disruption: antenatal care, family planning,</li> <li>Difficulty accessing family control products</li> <li>Stress and anxiety from disease and economic and social impacts</li> </ul>	<ul style="list-style-type: none"> <li>Most health facilities postponed service during lockdown and movement control</li> </ul>	Adolescents, especially women and girls
	3.2 Child deaths	<ul style="list-style-type: none"> <li>Better personal hygiene and health literacy</li> <li>Lower incidence of communicable diseases</li> </ul>	<ul style="list-style-type: none"> <li>Service disruption: antenatal care, well baby clinics</li> </ul>	<ul style="list-style-type: none"> <li>Most health facilities postponed service during lockdown and movement control</li> <li>Over one-quarter decrease in influenza incidence, &gt;40% decrease in hand-food-mouth disease Dengue, and Scrub typhus, and nearly two-thirds decrease in Measles incidence</li> </ul>	Poor, unemployed



	SDG 3 targets	Positive contributing factors	Negative contributing factors	Early evidence	Vulnerable populations
Diseases and Health Outcomes	3.1 Maternal mortality		<ul style="list-style-type: none"> <li>Service disruption: antenatal care</li> </ul>	<ul style="list-style-type: none"> <li>Most health facilities postponed service during lockdown and movement control</li> </ul>	Poor, unemployed
	3.3 HIV, Tuberculosis, Malaria, Hepatitis B	<ul style="list-style-type: none"> <li>Fewer contacts and lower incidence of communicable diseases</li> </ul>	<ul style="list-style-type: none"> <li>Service disruption: special clinics</li> <li>Difficulty accessing medicines or health products</li> </ul>	<ul style="list-style-type: none"> <li>STI clients decreased by 50–75% after lockdown</li> <li>Longer drug dispensing period for chronic cases, e.g. four to five months instead of two to three months</li> <li>Reports of cases of difficulty accessing condoms, some cannot travel to obtain HIV medicines from usual providers</li> <li>Sex workers' STI screening decreased by around 90%</li> <li>Almost half sex workers surveyed had difficulty accessing STI screening and treatment, and nearly two-fifths reported increased difficulty accessing condoms</li> </ul>	Sex workers, poor, migrants
Health System Functions	3.8 UHC, Essential services	<ul style="list-style-type: none"> <li>Lower incidence of communicable diseases</li> <li>Referral down to PHC</li> <li>Lower demand due to fear of contagion</li> </ul>	<ul style="list-style-type: none"> <li>Service disruption, lower quality of care</li> <li>Lower demand due to fear of contagion</li> <li>More unemployed covered under UCS</li> <li>Higher cost from COVID-19 screening and treatment</li> <li>Mid-term fiscal space constraint and limited government budget for health</li> </ul>	<ul style="list-style-type: none"> <li>Elective cases or uncomplicated cases in most hospitals postponed or transferred to PHC level, longer drug dispensing period for chronic cases, e.g. six months instead of two to three months</li> <li>Admission in the UCS 6% lower in March and April</li> <li>Teaching hospitals plan 20% reduction in outpatient visits in the future</li> <li>Estimated 900,000 new UCS members from those unemployed and switching from Social Security Scheme</li> <li>Additional budget requested from the Government</li> </ul>	Uninsured, migrants, poor
	3.B Vaccines and medicines	<ul style="list-style-type: none"> <li>Increased public awareness of and support for UHC and access to health</li> </ul>	<ul style="list-style-type: none"> <li>Mid-term fiscal space constraint and limited government budget for health</li> </ul>	<ul style="list-style-type: none"> <li>Free COVID-19 treatment including medicines, stockpiling of antiviral favipiravir</li> <li>Thailand starts testing local COVID-19 vaccine candidates in animals, and collaborates with Chinese university on vaccine development</li> </ul>	
	3.C Human resources for health	<ul style="list-style-type: none"> <li>Increased public recognition of health professionals' value to society</li> <li>More civil service positions and compensation for public health ministry</li> </ul>	<ul style="list-style-type: none"> <li>Stress and anxiety among healthcare staff</li> </ul>	<ul style="list-style-type: none"> <li>45,000 additional civil service posts for healthcare staff under Ministry of Public Health</li> </ul>	Rural
	3.D IHRs	<ul style="list-style-type: none"> <li>Lessons from pandemic responses</li> <li>Better coordination and communications</li> <li>Increased public awareness and support</li> </ul>			Urban, tourist-heavy areas

## SDG 4 Quality education

Thailand's achievement in providing quality of education according to key indicators are shown in Table 15

**Table 15: SDG 4 Targets and Thailand Localised Indicators**

SDG 4 target	Thailand indicator	Baseline	Target for 2030	Target for 2021	Current status	Progress	
4.1 By 2030, ensure that all girls and boys complete free, equitable, and quality primary and secondary education leading to relevant and effective learning outcomes	SDG 4.1.1 Proportion of third-grade students who pass the National Test		60	40	37.2% (Office of the Basic Education Commission 2018)		
	SDG 4.1.2 Proportion of a) sixth and b) ninth grade students who pass the O-NET test		60	50	a)37% b) less than 10%		
	SDG 4.1.3 Proportion of students who pass the basic proficiency level in PISA	Reading 50%, Maths 53%, Science 47% (PISA 2015)				Reading 40%, Math 47%, Science 56% (PISA 2018)	
	SDG 4.1.4 Net enrolment rates (primary)	90.8% (2015)	Primary 100%	Primary 100%	94%		
	SDG 4.1.5 Net enrolment rates (lower secondary, general upper secondary, vocational levels)	Secondary 77.27% (2015)	Lower secondary 100%, upper secondary 90%	lower secondary 100%, upper secondary 80%	Lower secondary 77.9%, upper secondary 54.3%		
	SDG 4.1.6 Graduation rate of students (lower secondary, general upper secondary, vocational levels)	Primary 97.9 %, lower secondary 92.9%, upper secondary 90.3%, vocational 78.9% (academic year 2014)	Primary 100%, lower secondary 100%, upper secondary 100%, vocational 90%	Primary 100%, lower secondary 100%, upper secondary 90%, vocational 80%	Primary 97.6%, lower secondary 90.1%, upper secondary 92.6%, vocational 59.9% (academic year 2015/16)		
4.2 By 2030, ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education	SDG 4.2.1 Proportion of children under five years of age who are developmentally on track in health, learning, and psychosocial well-being, by sex from 1) UNICEF's MICS Survey 2) Ministry of Public Health annual survey		94%	92%	91.10%		
	SDG 4.2.2 Enrolment rate in pre-primary education	92.6% (2016/17)	100%	90%			

SDG 4 target	Thailand indicator	Baseline	Target for 2030	Target for 2021	Current status	Progress
4.3 By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university	SDG 4.3.1 A) ratio of vocational to upper secondary general students	32.7/67.3 (2014/15)	60/40	45/55	34.6/65.4 (year 2018)	
	B) Enrolment rate at tertiary level (university)	49.29% (2016)	70	50	58.5 (year 2018)	
	C) Enrolment rate at tertiary level (vocational diploma)		70	60		
4.4 By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship	SDG 4.4.1 A) proportion of workforce with computers					
	B) proportion of workforce with access to internet (Thailand may consider using Global Indicator as its started Media and Information Literacy Survey in 2020)				66–68% from Media and Information Literacy Survey in 2020	
4.5 By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations	SDG 4.5.1. Enrolment by gender/rural/urban area (pre-primary, primary, secondary, higher education levels)		1	1	Pre-primary 1.05, primary 1.06, lower secondary 1.17, upper secondary 1.18	
4.6 By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy	SDG 4.6.1. A. Literacy rate/ numeracy rate of 15-year-old and beyond population	92.9/95.6 (2015)	100%			
	B. Years of education of 15-year-old population	9.52	12.5	10.7	9.57	

SDG 4 target	Thailand indicator	Baseline	Target for 2030	Target for 2021	Current status	Progress
4.7 By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development	SDG 4.7.1 Percentage of students who study environment/natural preservation in the curriculum		100%			
4A) Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all	SDG 4A.1. Ministry of Education to collect data on proportion of schools with access to: (a) electricity; (b) the internet for pedagogical purposes; (c) computers for pedagogical purposes; (d) adapted infrastructure and materials for students with disabilities; (e) basic drinking water; (f) single-sex basic sanitation facilities; and (g) basic handwashing facilities (as per the water, sanitation and hygiene (WASH) indicator definitions)		100%		a) 99.91% b) 99.18% c) 100% d-f) N/A	

SDG 4 target	Thailand indicator	Baseline	Target for 2030	Target for 2021	Current status	Progress
4B) By 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing states and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries	4B.1) Volume of official development assistance flows for scholarships by sector and type of study				(Donor) THB 4,508.74 million; (Receiver) THB 1,582.9 million	
4C) By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing states	4C.1) Proportion of teachers in: (a) pre-primary; (b) primary; (c) lower secondary; and (d) upper secondary education who have received at least the minimum organised teacher training (e.g. pedagogical training) pre-service or in-service required for teaching at the relevant level in a given country	100%	100%	100%	100%	

Source: Ministry of Education and SDG Move (2019), cited in OPM, Chapter 4

The overall possible effects of COVID-19 on Thailand's education landscape can be summarized as follow :<sup>157</sup>

- **SDG Target 4.1 (Quality education for all at primary and secondary levels):** Any learning losses and exacerbated learning inequalities may be reflected in the national examinations to be conducted in 2021. If student dropout increases, the net enrolment rates and graduation rates may fall. This is of concern, given the sector was already not on track to meet targets.
- **SDG Target 4.2 (Quality ECD):** For the most vulnerable children, time away from ECD centres may affect their health and nutrition. Overall, enrolment of children in pre-primary education is not expected to be affected, although there may be a shift in enrolment from the private to the public sector.
- **SDG Target 4.3 (Technical, vocational, and tertiary education):** Enrolment at these levels may be affected; however, vocational training or/and re-training may be a part of the government economic stimulus plan to boost employment.
- **SDG Target 4.4 (Skills for work):** There is no predicted impact from COVID-19 on indicators such as the proportion of the workforce with computers or access to the internet.
- **SDG Target 4.5 (Equity):** Pre-existing vulnerable groups may be further at risk of dropout due to being disproportionately affected by learning loss and the economic impacts of recession. Girls, who have previously had higher enrolment and learning outcomes, may be negatively affected.
- **SDG Target 4.6 (Literacy and numeracy):** Learning loss may negatively impact the levels of literacy and numeracy.
- **SDG Target 4.7 (Sustainable development and global citizenship):** There is no predicted impact from COVID-19 on indicators such as the percentage of students learning about environmental and natural preservation.
- **SDG Target 4A, 4B and 4C (Education facilities, scholarships and teachers):** It is likely that the Government may invest more in the provision and maintenance of computers and internet in schools post-COVID-19

## SDGs related to the issue of protection against violence, exploitation, and abuse

**Table 16: Progress Towards Achievement of SDG Targets**

SDG indicators for violence, exploitation, and abuse	Progress
16.1.1 Number of victims of intentional homicide per 100,000 population, by sex (victims per 100,000 population)	2010: 8.77 per 100,000 males and 1.21 per 100,000 females 2012: 7.68 per 100,000 males and 1.23 per 100,000 females in 2012 (not disaggregated by age). Thereafter rates are not disaggregated by sex or age
16.1.1 Number of victims of intentional homicide, by sex and age (number)	2014 2,248 male 404 female 2015 2,387 total 2016 2,229 total
16.1.3 Proportion of population subjected to (a) physical violence (b) psychological violence and (c) sexual violence in the previous 12 months	Proportion of population subjected to physical violence in the previous 12 months was 0.3% in 2016 (UNODC) No official data concerning psychological or sexual violence available
5.2.1 Reduced prevalence of IPV (sexual and/or physical)	No official data available

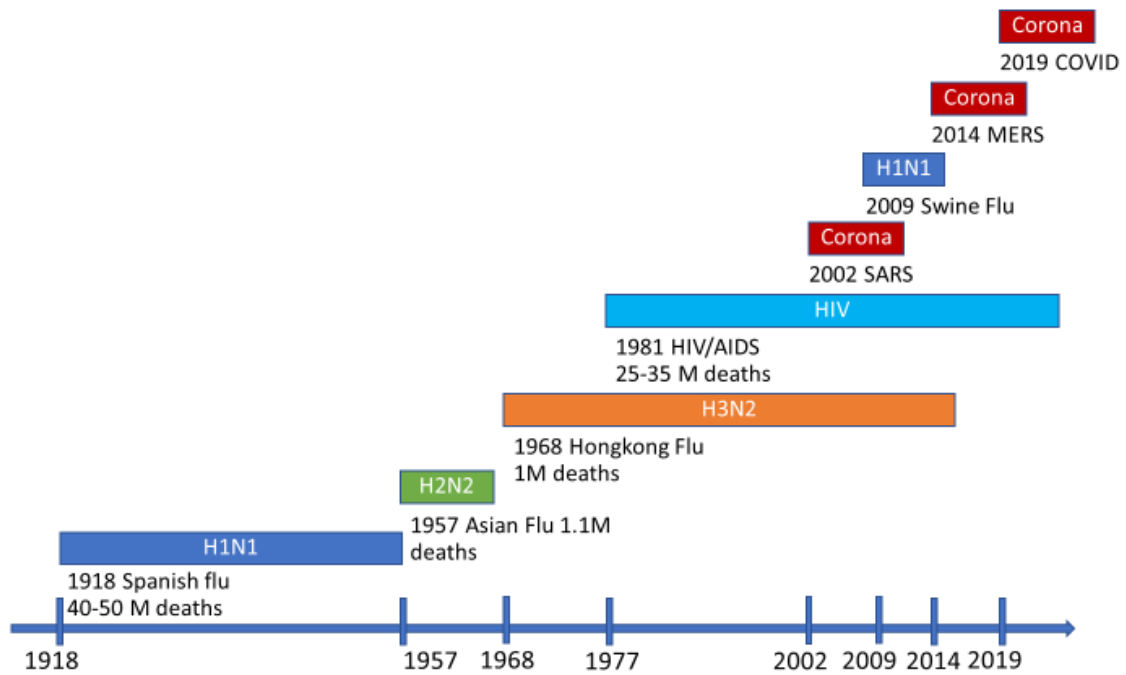
SDG indicators for violence, exploitation, and abuse	Progress															
5.2.2 Proportion of women and girls aged 15 years and older subjected to sexual violence by persons other than an intimate partner in the previous 12 months, by age and place of occurrence	No official data available															
5.3.2 Proportion of women aged 20–24 years who were married or in a union before age 18 (%)	Multiple Indicator Cluster Survey 2015–16: 22.5%															
5.3.1 Proportion of women aged 20–24 years who were married or in a union before age 15 (%)	Multiple Indicator Cluster Survey 2015–16: 4.4%															
16.2.1 Proportion of children who experienced physical punishment and/or psychological aggression by caregivers in last month (% of children aged 1–14 years)	Multiple Indicator Cluster Survey 2015–16: 75.20%															
16.2.2 Number of victims of human trafficking per 100,000 population by sex, age, and form of exploitation	<p>Detected victims of human trafficking for forced labour, servitude, and slavery</p> <p>2014: 188 all ages, 19 male, 38 female</p> <p>2016: 460 all ages, 388 male (18 years +) 24 female (18 years +)</p> <p>Detected victims of human trafficking for sexual exploitation 2014</p> <table border="0"> <tr> <td>376</td> <td>All ages</td> <td>both sexes</td> </tr> <tr> <td>21</td> <td>18+</td> <td>male</td> </tr> <tr> <td>26</td> <td>&lt;18y</td> <td>male</td> </tr> <tr> <td>257</td> <td>&lt;18y</td> <td>female</td> </tr> <tr> <td>72</td> <td>18+</td> <td>female</td> </tr> </table> <p>Thereafter datasets not complete</p>	376	All ages	both sexes	21	18+	male	26	<18y	male	257	<18y	female	72	18+	female
376	All ages	both sexes														
21	18+	male														
26	<18y	male														
257	<18y	female														
72	18+	female														
16.2.3 Proportion of young women and men aged 18–29 years who experienced sexual violence by age 18	No official data available															
8.7.1 Proportion of children engaged in economic activity (by sex and age)	No official data available															
8.8.1 Incidence of fatal occupational injuries per 100,000 workers (by sex and migrant status)	Decrease from 7.13 per 100,000 workers in 2013 to 6.84 per 100,000 workers in 2014. No disaggregation by sex or migrant/non-migrant status															
8.8.2 Incidence of non-fatal occupational injuries per 100,000 workers (by sex and migrant status)	Decrease from 352.96 per 100,000 workers in 2013 to 321.13 per 100,000 workers in 2014. No disaggregation by sex or migrant- non-migrant status															

Sources: 2015–2016 MICS and United Nations SDG Indicators Metadata repository, unless otherwise stated, Cited in OPM, Chapter 6

# Annex: C

## Data Support on Policy Recommendations

Figure 7: Pandemic Cycle



Adapted from Daniel B. Jernigan, Director, Influenza Division, Centers for Disease Control and Prevention, 2020 and Nicholas LePan, Visualizing the History of Pandemics, 2020



## Policy Playbook

### 1. Fiscal and financial support

Table 17: Fiscal and Financial Measures to Support Business

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
1.Ensuring sufficient cash flow and financial recovery	Interest-free loans/ interest subsidies	This is applicable to loans targeting small businesses or businesses in the most affected sector; without interest or with subsidy	High	Short	Low	Implemented - potential for greater targeting	Medium term	High
	Deferral of non-wage business payments	Payments may include items like rent	High	Short	Low	Not implemented - potential introduction	Short term	High
	Deferral of tax payments	This include corporate income tax payments, VAT, security contributions, deferring property taxes and additional time to file tax returns	High	Short	Low	Implemented - potential extension and expansion of considerations	Short term	High
	Tax administration	Acceleration of tax refunds (VAT and other taxes), tax debt repayment plans	High	Medium	Medium	Implemented - no further action	-	Medium
	Non-tax waivers and deferrals	Waiver for the submission of financial statements, waiver for penalties for non-filing of tax returns	Medium	Short	Low	Implemented - potential extension and expansion of considerations for deferrals	Short term	High
	Tax waivers	Waivers related to social security benefits, property taxes, reduction of vehicle taxes, levies on tourism, airline companies and exempting some inputs from import taxes, waiver of penalties and interest for older tax debts	High	Short	Low	Implemented - potential extension and expansion of considerations	Short term	High
	Tax credits	Issuance of tax credits to companies e.g. for retaining a high proportion of staff	High	Medium	Medium	Not implemented - could be considered	Short term	Medium

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
<b>2. Enabling worker retention</b>	Loan guarantees	Government guarantee on all or part of the value of loans granted to businesses, especially those in hard-hit sectors/for SMEs	High	Medium	Medium	Not implemented - could be considered	Short term	Medium
	Unemployment benefits	Enhancing and expanding provision of benefits to those who are temporarily unemployed or working reduced hours	High	Short	Medium	Implemented - potential extension and expansion of coverage	Medium term	High
	Wage subsidies	Supporting employers to pay their employees and supporting workers to ensure they continue to receive an income; for businesses and self-employed persons that have suspended or reduced operations	High	Short	Medium	Implemented - potential extension	Medium term	High

Table 18: Monetary Support to Business

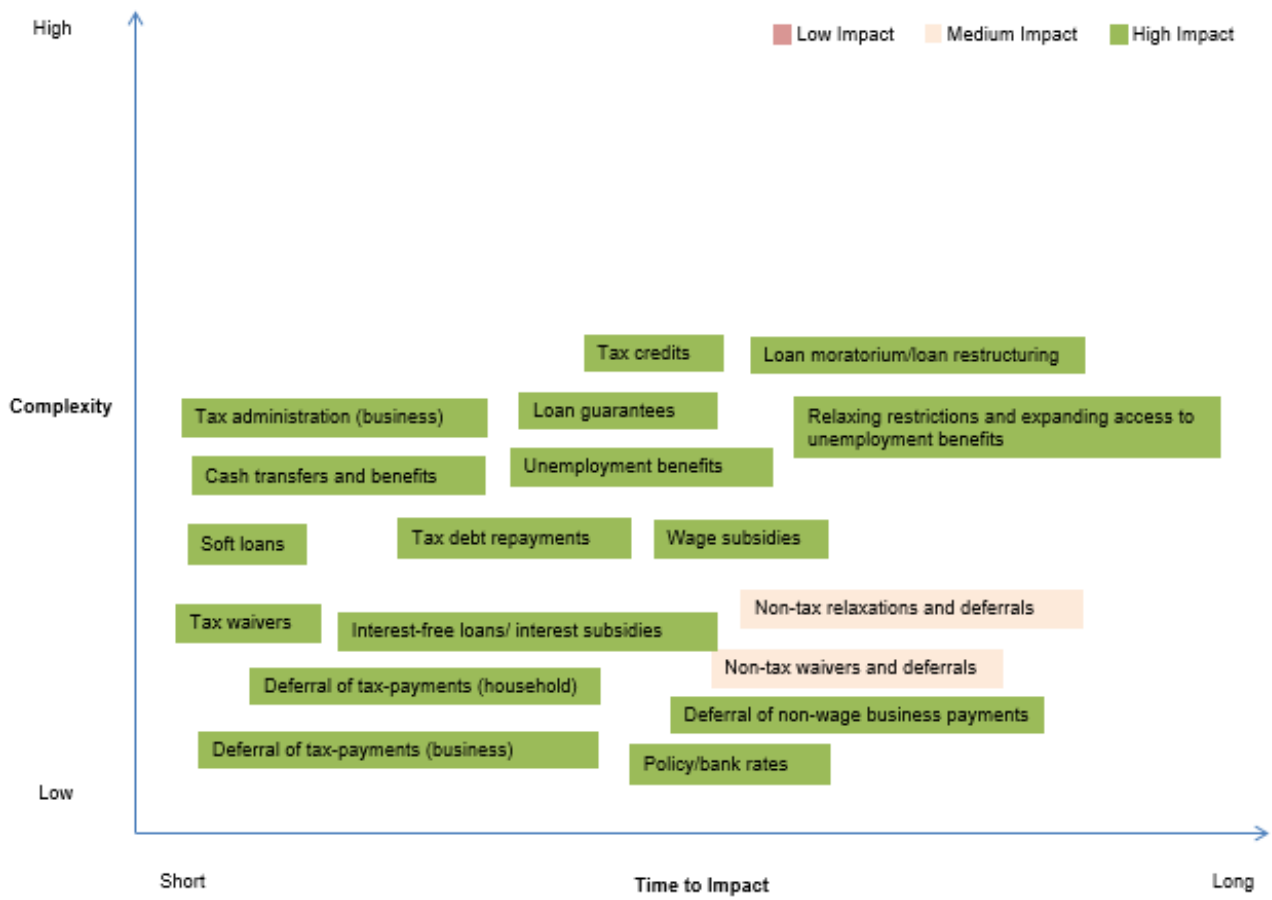
Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
<b>Measures to manage liquidity and boost economic recovery and growth</b>	Policy/bank rates	Reduction of bank policy rate per annum	High	Medium	Low	Implemented - no further action	-	Medium
	Loan moratorium; loan restructuring	Moratorium on loan repayments for a defined period; interim suspension of all payments of obligations based on the loan (principal, interest, default interest, fees) as well as restructuring loans	High	Long	High	Implemented - potential extension	Medium term	Medium
	Soft loans	Provision of soft loans by banks to financial institutions and enterprises	High	Short	Medium	Implemented - possible expansion and targeting	Medium term	High

Table 19: Financial Measures to Support Households

Category	Policy tool	Details of policy tool	Impact	Time to Impact	Complexity	Current status and further options	Proposed duration	Priority level
<b>1.Ensuring sufficient cash flow and financial recovery</b>	Cash transfers and benefits	Immediate financial support to the most vulnerable households in the crisis or otherwise targeted towards sick workers, temporarily unemployed workers, self-employed including health benefit payments.	High	Short	Medium	Implemented - potential extension and targeting	Short term	High
	Deferral of tax payments	Personal income tax payments, deferring property taxes and additional time to file tax returns; tax payment deferral measures targeted at low-income households	High	Short	Low	Implemented - potential extension for deferrals	Short term	High
	Tax debt repayments	Allowing for more flexible arrangements for tax debt repayments (could be targeted towards lower income households)	High	Medium	Medium	Implemented - potential extension	Short term	Medium
	Non-tax relaxations and deferrals	Early release of superannuation; allowing special withdrawals from the Employment Provident Fund, deferral of interest payments on mortgage debt	Medium	Medium	Low	Not implemented - could be considered	Short term	High
<b>2.Expanding access to paid sick leave and unemployment benefits</b>	Relaxing restrictions and expanding access	Less restrictive access conditions, expanding eligibility, requirements for employers to provide sick leave, expanded unemployment benefits to workers in quarantine as well as workers in the informal sector and access to employment insurance	High	Medium	Medium	Implemented - potential extension and expansion of coverage	Medium term	Medium

Source: EIU

**Figure 8: Scatterplot for Short and Medium-Term Policy Considerations**



Note: The priority options are analysed in more detail in a narrative following the matrix and scatterplot  
 Source: EIU, 2020

Table 20: Comparing Fiscal and Monetary Policies taken by ASEAN Countries

Country	Fiscal stimulus packages									Monetary policies		
	Overall fiscal measures	Health system measures	Income support measures for individuals and household, excluding tax and contribution changes	Tax and contribution policy changes	Public sector subsidies to firms	Deferral of taxes and social security contributions and bringing-forward expenditure within current fiscal year	Public sector loans or capital injections to firms	Loan guarantees by the state, benefiting private borrowers	Monetary policy	Prudential regulation		
<b>Brunei Darussalam</b>	✓	✓		✓	✓	✓	✓		✓	✓		
<b>Cambodia</b>	✓	✓	✓	✓	✓		✓		✓	✓		
<b>Indonesia</b>	✓	✓	✓	✓		✓			✓			
<b>Lao PDR</b>	✓	✓		✓		✓	✓		✓	✓		
<b>Malaysia</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
<b>Myanmar</b>	✓	✓	✓			✓	✓		✓	✓		
<b>Philippines</b>	✓	✓	✓		✓	✓	✓		✓	✓		
<b>Singapore</b>	✓	✓	✓		✓	✓	✓		✓			
<b>Thailand</b>	✓	✓	✓	✓	✓	✓	✓		✓	✓		
<b>Vietnam</b>	✓	✓	✓	✓	✓	✓	✓		✓	✓		

Source: OECD compilation, cited in EIU, 2020

# Annex: D

## List of Experts Consulted

**Table 21: List of Experts Consulted**

Name	Position/expertise	Agency/organization
1. Dr. Prasarn Triratworakul	Former governor	Bank of Thailand
2. Dr. Wijarn Simachaya	Director	Thailand Environment Institute
3. Mr. Ennoo Suesuwan	Chairman	Committee on Drafting the National Strategy on Social cohesion and Equity
4. Dr. Anek Laothammatat	Minister	Ministry of Higher Education, Science, Research and Innovation
5. Khunying Jada Wattanasiritham	Honorary Chairman	Thai Institute of Directors
6. Dr. Kurujit Nakornthap	Chairman	Thailand Greenhouse Gas Management Organization
7. Dr. Somporn Isawilanond	Economist	Knowledge Network Institute of Thailand
8. Dr. Kraiyos Patrawat	Deputy Manager	Education Equitable Fund
9. Dr. Don Nakornthab	Senior Director	Economic and Policy Department, Bank of Thailand
10. Dr. Suwit Vibulpotprasert	Senior Advisor	Ministry of Health
11. Pornnaris Chuanchaisith	Chairman	The Thai Real Estate Association
12. Thapana Boonyaprawit	Chairman	The Thai City Plan Association

# Annex: E

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**United Nations in Thailand**

UN Building, 12th Floor  
Rajdamnern Nok Avenue  
Bangkok, Thailand

[unrc.thailand@one.un.org](mailto:unrc.thailand@one.un.org)  
Facebook [@thailand.un](#)  
Twitter [@UNThailand](#)