

COVID-19'S IMPACT TO THE PHILIPPINE ECONOMIC SECTORS: A TVET RESPONSE

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How can TVET contribute to the effect of COVID-19 to the Philippine Economic Sectors?

I. Introduction

a. COVID-19 as a Global Pandemic

The outbreak emerged in January 2020, severely affecting the People's Republic of China and rapidly spread across the world. According to the World Health Organization (WHO), COVID-19 primarily transmitted from an infected person to others through droplets of saliva or discharge from the nose. Older adults and people who have underlying medical conditions are at higher risk for having critical symptoms and even death. On 11 March 2020, the World Health Organization has declared that the COVID-19 is a pandemic. As of 24 April 2020, 2,735,117 persons around the world have been infected of the virus, and has recorded 192,019 deaths and 751,501 recoveries.¹ On the same date, 7,192 persons are confirmed cases, with 477 deaths and 762 recoveries in the Philippines.²

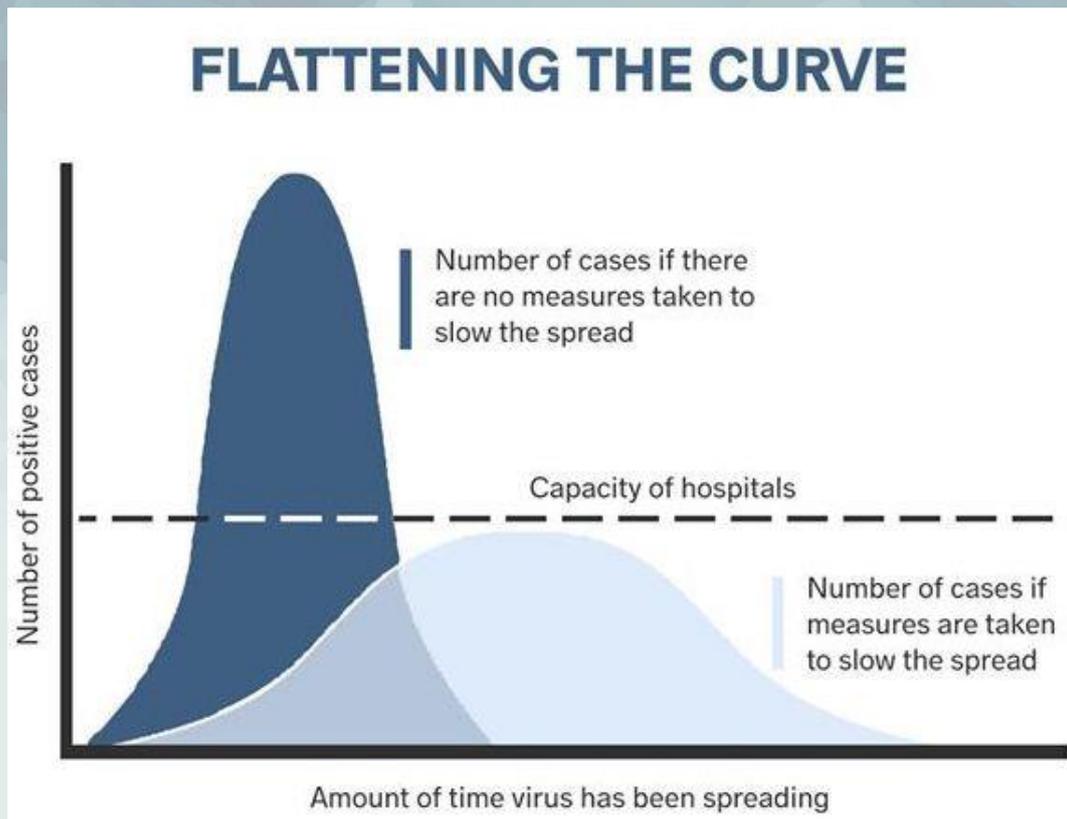
b. Flattening the Curve

A State of Public Health Emergency throughout the Philippines was issued by President Duterte, and subsequently a declaration of a State of Calamity throughout the Philippines, along with the imposition of an Enhanced Community Quarantine (ECQ) throughout Luzon, as an effort to be able to "flatten the curve."

¹ COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) at Johns Hopkins University
<https://www.arcgis.com/apps/opsdashboard/index.html#/bda7594740fd40299423467b48e9ecf6>

² <http://www.covid19.gov.ph/>

Figure 1: Flattening the Curve



Source: Ateneo School of Medicine and Public Health

The vertical axis represents the number of positive cases, and the horizontal axis represents the amount of time the virus has been spreading. A broken line was also included in the graph to represent the healthcare system capacity.

As illustrated in the graph, the number of positive cases will balloon without any interventions taken to slow the spread of the virus. The Philippines has taken several measures to slow the spread of the virus so as not to overwhelm the limited capacity of the country's healthcare system. The community quarantine/lockdown efforts can also help the country to buy some time in capacitating the healthcare system to "detect, test, isolate and treat every case and trace every contact."

In addition, scientists also found that a one-time lockdown will not be sufficient to control the spread of the virus, and resurgence of its spread is highly likely. They recommend the prolonged or intermittent social distancing be practiced until a treatment or vaccine is available in order to keep the number of critical care cases within capacity. The WHO adds that people "change behaviors for the foreseeable future".

Moreover, the WHO also gave the following conditions for the lifting of quarantines/lockdowns:

1. Disease transmission is under control
2. Health systems are able to "detect, test, isolate and treat every case and trace every contact"
3. Hot spot risks are minimized in vulnerable places, such as nursing homes
4. Schools, workplaces and other essential places have established preventive measures
5. The risk of importing new cases "can be managed"
6. Communities are fully educated, engaged and empowered to live under a new normal.

c. Implications to the Economy

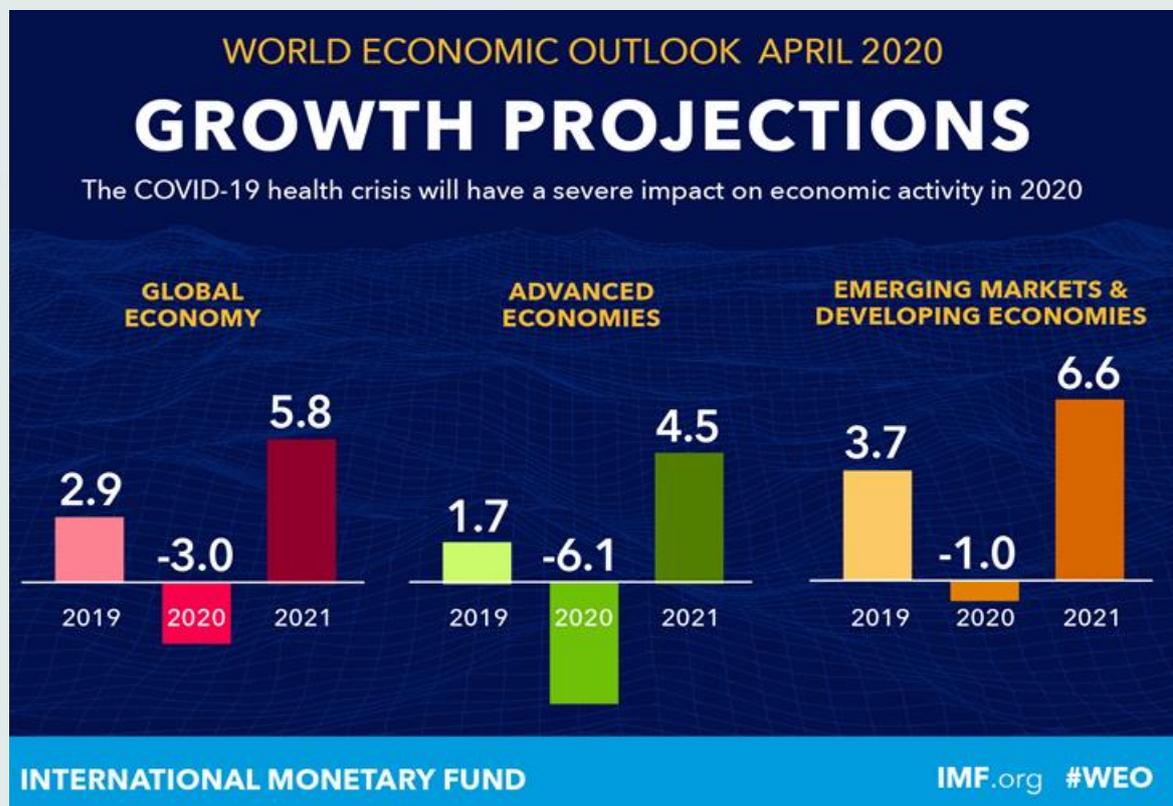
Containment of the virus through quarantines and lockdowns has caused major disruptions in economic activities. Part II of this brief shall discuss the implications of the pandemic to the world, the region, and the Philippine economy.

II. Discussion

a. Global Forecasts

The International Monetary Fund (IMF) forecasts negative growth in Gross Domestic Product (GDP) for all economies this 2020. The possible reason, as the National Economic and Development Authority (NEDA) analyzes that this is due to the effects from reduced demand and heightened uncertainty of the impact and extent of the pandemic. The IMF, however, is optimistic of economic recovery in 2021.

Figure 2: Growth Projections in the Time of COVID-19

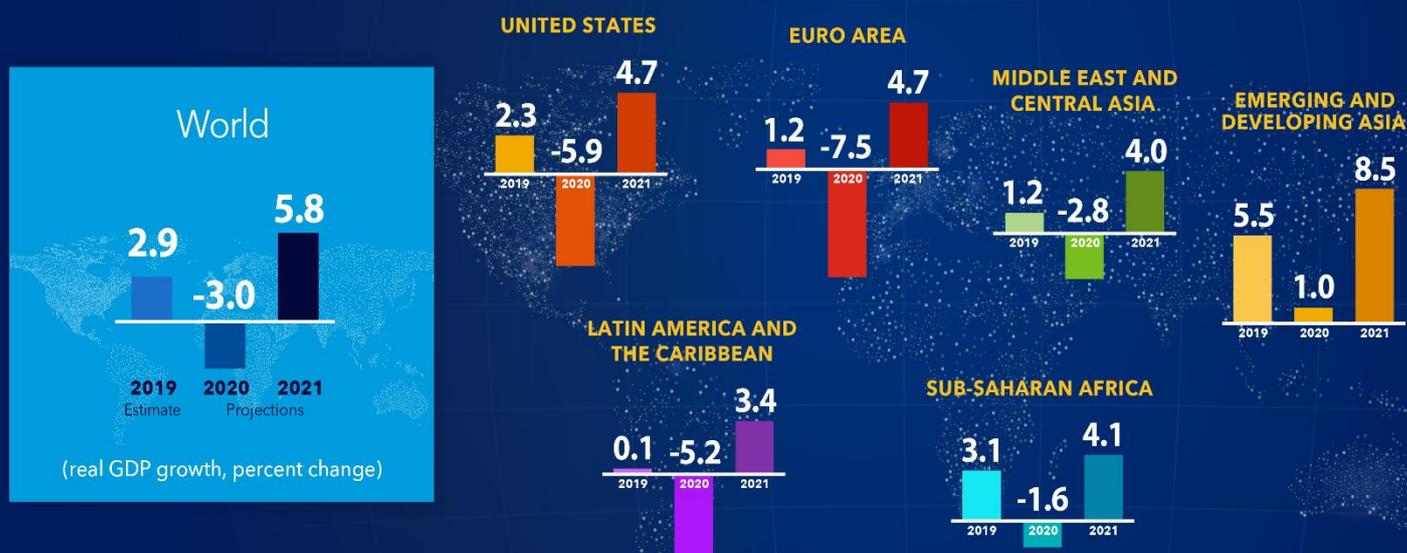


Source: International Monetary Fund

Figure 3: World Economic Outlook Growth Projections

Latest World Economic Outlook growth projections

(percent change)



Source: IMF, *World Economic Outlook*, April 2020.

Note: Order of bars for each group indicates (left to right): 2019, 2020 projections, and 2021 projections.

IMF.org/social

Source: International Monetary Fund

The Asia Pacific Economic Cooperation (APEC) region also foresees a decline in growth of its member economies by 2.7 percent this year, estimated to be a loss of worth USD 2.1 trillion in economic output.

In the region, all economies in Southeast Asia will endure a growth slowdown in 2020 (decelerate to 1.0% growth), especially given their strong trade and investment ties with the PRC.

As to employment, the International Labour Organization (ILO) estimates that 1.25 billion workers, comprising almost 38% of the global workforce, are employed in sectors that are at risk in decline of output, which also results to decline in the workforce. Experts predict that loss of jobs and income will drive about half a billion people into poverty. Thus, safeguards through social protection measures are to be undertaken by governments to support the vulnerable sectors of society.

In addition, governments are recommended to establish strong multilateral cooperation in overcoming the pandemic, specifically in helping financially constrained countries that have weak health care systems and are financially constrained in providing socioeconomic aid to their citizens.

b. Philippine Economic Outlook

For the Philippines, NEDA estimates that GDP growth is estimated at 2.0% for 2020, but is expected to recover with an estimated 6.5% growth in 2021. The Asian Development Bank (ADB), however, estimates that the containment of COVID-19 will result in a loss of -0.79% to -1.62% of Philippine GDP.

The entire island of Luzon has been on enhanced community quarantine (ECQ) since 15 March 2020, and will be until 30 April 2020.³ The initial estimate of NEDA on economic losses on a 1-month ECQ of Luzon is a cumulative loss of PHP428.7 to PHP1,355.6 billion in gross value added (in current prices), equivalent to 2.1% to 6.6% of nominal GDP in 2020. But for a 45-day ECQ, the amount of losses is estimated to be roughly PHP1.1 trillion, or equivalent to 5.6% of GDP. The Philippine Institute for Development Studies (PIDS) estimates the Philippine economy may lose between 276.3 billion (best case) and PHP 2.5 trillion (worst case) due to COVID-19. With the ECQ extended, through a modified one, in Metro Manila, Laguna, and Cebu City, from May 16 to 31, it is anticipated that more losses will be incurred.

As to employment, the ADB estimates total employment to be reduced from -0.82% up to -1.69%. NEDA estimates employment losses to be at 116,000- 1,800,000.

- **Economic Sectors Most at Risk**

Based on numerous references, the table below describes the economic impacts due to COVID-19. The sectors are arranged from highest risk to lowest risk based on the ranking by the International Labour Organization (ILO).

Table 1: Economic Impacts of COVID-19

Sector	Impact
HIGH RISK	
Wholesale and Retail Trade, repair of motor vehicles and motorcycles	<ul style="list-style-type: none">• Losses: PHP 93.2 to 724.8 billion (PIDS)• Establishments deemed non-essential face widespread closures. Workers of these establishments face reduced working hours or compensation, or are even laid-off.• Workers in this sector who are engaged in activities deemed essential (e.g. food distribution) may continue to work, but they face greater occupational health risks.• These establishments have been encouraged to strengthen their use of internet retail or online commerce, as well as to promote to the public to direct them to purchase online.

³ <https://www.rappler.com/nation/256432-duterte-extends-luzon-lockdown-april-30-2020-coronavirus-pandemic>

⁴ <https://www.cnnphilippines.com/news/2020/4/24/Enhanced-community-quarantine-extended-Philippines-Duterte-COVID-19.html>

<p>Manufacturing</p>	<ul style="list-style-type: none"> • Losses: PHP 82.1 to 855.2 billion (PIDS) • The Center for Economic Policy and Research (CEPR) based in Washington, D.C. describe the knock-on effects of virus-related disruptions as “supply chain contagion,” due to closure of factories and grinding of global supply chains. • Among the countries most affected by the pandemic are also among the Philippines’ major trading partners: Japan, USA, China, Hong Kong and Singapore.⁵ • There will be lesser demand for non-essential manufactured items such as automobiles and textiles, clothing, leather and footwear. • As of 10 March 2020, the Department of Trade and Industry (DTI) reports that the following manufacturing sectors will be negatively affected: Aerospace, Automotive and Auto Parts, Electronics, Footwear, Furniture, Iron and Steel, Pharmaceuticals, Plastics, Shipbuilding, Textiles and Garments. In addition, there will be no negative impact on Chemicals, Copper, Leather, Natural Health Products. • DTI Secretary Ramon Lopez made pronouncements on the repurposing of manufacturing for critical and essential products, packaging and raw materials. The Confederation of Wearable Exporters of the Philippines (Conwep) has ventured into the production of Personal Protective Equipment (PPE). An electronics company has repurposed its manufacturing for the production of medical-grade face masks, face shields and ventilators.
<p>Real estate, renting and business activities</p>	<ul style="list-style-type: none"> • Losses: PHP 10.7 to 79.7 billion (PIDS)
<p>Accommodation and food services / Hotel and Restaurants and other personal services</p>	<ul style="list-style-type: none"> • Almost all establishments in this sector are non-operational during the ECQ. A steep decline in demand for these services is also foreseen when they will be allowed to operate. • Food establishments have been allowed to operate for take out and delivery. • As with wholesale and retail trade, these establishments are also promoting to the public to transact through online channels.
<p>MEDIUM-HIGH</p>	
<p>Transport, storage and communication</p>	<ul style="list-style-type: none"> • The International Air Transport Association (IATA) predicted the COVID-19 outbreak could cost airlines \$113 billion in lost revenue as fewer people take flights. • Losses: PHP 11.7 to 124.3 billion (PIDS) • Restriction of land, air and sea travel, as well as suspension of mass transport and all domestic flights during the ECQ has resulted into loss of income and employment to the establishments and workers in the sector. • However, the drivers, postal and other delivery workers, as well as people who work in warehouses that support transport and global supply chains continue to work to meet the demands for essential goods, as well as the increasing demand for online retail.

⁵ Highlights of the Philippine Export and Import Statistics: February 2020 (Preliminary) <https://psa.gov.ph/statistics/foreign-trade/fts-release-id/161095>

Tourism	<ul style="list-style-type: none"> As of 10 March 2020, the DTI reports that there is a negative impact on Tourism. Among the countries most affected by COVID-19, China and South Korea also comprise the most number of tourists, and among those who accumulate the most tourism receipts in the country. NEDA estimates that “the decline in foreign tourists and airline revenues for one month due to the ECQ in Luzon will result in a loss of gross value added (GVA) of PHP77.5 to PHP156.9 billion, equivalent to 0.4 to 0.8 percent of GDP in 2020. Likewise, the slowdown in economic activities may reduce employment by about 33,800 to 56,600.”
Arts, entertainment and recreation, and other services	<ul style="list-style-type: none"> Activities in this sector “such as live performances, events or exhibits intended for public viewing, art galleries, concerts, and opera or dance production, operation of concert and theater halls, and other arts; as well as gambling facilities such as casinos, bingo halls, and video gaming terminals and the provision of gambling services such as lotteries and off-track betting” have been prohibited from operating during the ECQ.
<u>MEDIUM</u>	
Mining and Quarrying	<ul style="list-style-type: none"> Losses: PHP 1.7 to 26.9 billion (PIDS)
Financial Intermediation	<ul style="list-style-type: none"> Losses: PHP 18.5 to 141.3 billion (PIDS)
Construction	<ul style="list-style-type: none"> Losses: PHP 1.7 to 19.3 billion (PIDS)
<u>LOW-MEDIUM</u>	
Agriculture, Forestry and Fishing/Agribusiness	<ul style="list-style-type: none"> Losses: PHP 9.4 to 110.3 billion (PIDS) Agricultural products have been deemed as essential goods, so there will be greater demand. As of 10 March 2020, the DTI reports that the following agribusiness sectors reports of <ul style="list-style-type: none"> Negative impact: Bananas, Processed Fruits, Biscuits, Processed Meat, Carrageenan/Seaweed No negative impact: Cassava Starch, Processed Fruits and Nuts, Virgin Coconut Oil Food insecurity became an issue due to containment measures, including border closures. The Inter-Agency Task Force for the Management of Emerging Infectious Diseases (IATF-EID) declared that “all agriculture and fishery stakeholders must be considered frontliners and their movements shall remain unhampered”. Likewise, the IATF-EID has also approved the Plant, Plant, Plant Program or Ahon Lahat, Pagkaing Sapat (ALPAS) Laban sa Covid-19, which aims “to further improve the country’s food adequacy levels through increased rice, food crops, livestock, poultry and fish production, including that of attaining efficient food processing, marketing and distribution to major consumption centers.

LOW

Utilities (Electricity, gas, water)	<ul style="list-style-type: none">• Losses: PHP 5.7 to 44.3 billion (PIDS)
Human Health and Social Work	<ul style="list-style-type: none">• The Department of Health (DOH) has issued interim guidelines for the emergency hiring of health personnel to expand its capability in responding to COVID-19. These are Physicians, Nurses, Medical Technologists, Respiratory Therapists, Radiologic Technologists, Medical Equipment Technicians, Nursing Attendants, Ambulance Drivers, and Administrative Assistants.• There is a need to provide health workers with adequate resources in order to be able to perform their work and minimize the risk.• As of 22 April 2020, a total of 1,062 healthcare workers have been infected by COVID-19, namely, 422 doctors, 386 nurses, 30 medical technologists, 21 radiological technologists, 51 nursing assistants and 152 other medical personnel such as administrative staff and barangay health workers.⁶• Aside from the health professionals, the Barangay Health Emergency Response team members should be capacitated on COVID-19 Infection Prevention and Control (IPC), being the frontliners in the COVID-19 response at the community level.• Telemedicine and teletherapy services are now being used to make health services more accessible to the public.

Note: In the Technical annex of the ILO Monitor, the ranking is based on "the assessment of the impact of the crisis on economic output by different sectors is based on real-time economic and financial data including: IHS Markit Global Business Outlook and Sector PMI indices; Institute of International Finance; Cboe Volatility Index (VIX); McKinsey; OECD; Brookings; Moody's analytics; Corporate performance analytics; S&CF Insights; S&P Global; Continuum economics; Bloomberg; National Bureau of Statistics of China (NBS); and EUROSTAT."

b. Other affected sectors

- **OFW Remittances**

The World Bank estimates that the remittances to low and middle-income countries are expected to fall by 19.7 percent this year as migrant workers worldwide suffer layoffs and reduction in wages. Remittances are to drop to \$445 billion this year from \$554 billion in 2019.

Data from NEDA estimates that 30% of overseas Filipino workers (OFW) or around 100,000 persons are employed in tourism and tourism-related sectors. With the demand in the tourism sector declining, remittances from OFWs shall have a loss of gross value added of PHP3.9 to PHP8.5 billion, equivalent to 0.02 to 0.04 percent of GDP, and reduction of local employment from 1,700 to 4,500 persons.

A study by Ang and Opiniano approximates a larger decrease in remittances. They said that about 300,000 to 400,000 OFWs may be laid off or have reduced salaries due to the shutdown of offices abroad brought about by COVID-19. They estimate that cash remittances will decline by 10-20%, amounting to USD 3 to 6 billion.

⁶ <https://www.cnnphilippines.com/news/2020/4/22/1000-infected-health-workers-covid-19.html>

- **Household Consumption**

Because of the drop in labor supply and reduction of incomes due to the community-wide quarantines, Abrigo, et al. estimate that household consumption may reduce to between 0.7% to 5.3%. The NEDA estimates that consumption of non-essential commodities (i.e., alcoholic beverages and tobacco, clothing and footwear, furnishings, household equipment and routine household maintenance, recreation and culture, restaurants and hotels, and miscellaneous goods and services) could result in a loss of GVA of PHP45 to PHP94 billion, equivalent to 0.2% to 0.5% of GDP, and reduce employment by 16,500 to 62,500. The survey conducted by NEDA from April 5 to April 8 confirms these findings, as more than 50% in the non-government sectors experienced a decline in income, and at least 80% of which was due to loss of their source of livelihood. More than 80% of the respondents do not intend to buy durables after the ECQ is lifted.

- **Micro, Small and Medium Enterprises (MSMEs)**

Majority of the businesses in the Philippines are MSMEs. The ECQ has forced most establishments to close and lay off workers, as these MSMEs face cash flow issues. A number of MSMEs have capitalized on certain opportunities by bringing businesses online or through deliveries.

In the NEDA survey, almost two-thirds of the MSME respondents reported zero sales due to temporary closure, particularly those businesses considered non-essential. Despite the situation, 74.4% of the firms surveyed did not lay-off workers, while others (25.4%) temporarily laid off workers during ECQ. However, 80% of the respondent firms will be unable to operate when the ECQ is extended for another month, and 31% of them do not see good prospects for their business when ECQ is lifted.

- **Informal Sector**

Around 2 billion people work informally, most of them in emerging and developing countries. In the Philippines, workers in the informal sector comprise around 38% of the labor force, or around 15.5 million workers as of 2016. Workers in the informal sector are among the most vulnerable, due to their lack of social protection, no access to healthcare services, and are on a no-work no-pay work arrangement. Those who are able to work during the lockdown are also at risk of virus infection.

III. Government's Actions for the Sectors

Various efforts by the government have been crafted in response to the changes, challenges and opportunities due to the prevalence of the COVID-19 pandemic. Below are some of the policies/strategies/programs where TVET can provide support:

Sector	We Recover as One	Balik Probinsya, Bagong Pag-asa Program
	<p><i>Description: contains recommendations by the TWG-AFP to rebuild confidence and adjust to the "new normal" that will arise from the country's response to COVID-19.</i></p>	<p><i>Description: To address Metro Manila's congested urban areas by encouraging people, especially informal settlers to return to their home provinces and assist them in this transition with support and incentives on transportation, family, livelihood, housing, subsistence and education, among others.</i></p>
Wholesale and Retail Trade, repair of motor vehicles and motorcycles	<ul style="list-style-type: none"> Hasten growth of e-commerce (internet transactions) by focusing on speed, security, and structure to increase sales 	
Manufacturing	<ul style="list-style-type: none"> Redirect production to increase supply of essential goods and intermediate inputs Increase in non-essential but complementary goods 	
Tourism	<ul style="list-style-type: none"> Amend the National Accreditation Standards for all tourism enterprises (primary and secondary tourism enterprises) to include additional measures related to sanitation, disinfection, promotion of proper hygiene, and responsible information sharing. 	
Financial Intermediation	<ul style="list-style-type: none"> Secure funding for increased training among related institutions on digital transactions and services as well as cybersecurity measures 	
Construction	<ul style="list-style-type: none"> focus on the building of quarantine and other health facilities, and rehabilitation of existing ones to increase the capacity of the health care system There may even be increased construction demand in the rural areas Adopt digital technologies in the construction sector, particularly modular designs and structural specifications 	<ul style="list-style-type: none"> Development of infrastructure such as means of transport and communications, power resources, irrigation facilities, completion of existing and future railway projects, creation and improvement of transport terminals, construction of public markets

Sector	We Recover as One	Balik Probinsya, Bagong Pag-asa Program
Agriculture, Forestry and Fishing/ Agribusiness	<ul style="list-style-type: none"> • Intensify provision of support services and farm machineries and equipment • Strengthen online marketing of agricultural produce • Ensure safety of food and agricultural products supplied in the market • Intensify research and development (R&D) for agriculture • Promote adoption of urban agriculture, backyard/household gardening of edibles, and community farming 	<ul style="list-style-type: none"> • Encourage and facilitate innovations and technologies for agricultural production, such as modern rice farming techniques, seed production and farm mechanization
Information and Communication	<ul style="list-style-type: none"> • Allocate budget for re-skilling and up-skilling of workforce in the IT-BPM industry 	
Utilities	<ul style="list-style-type: none"> • Streamline the management of health care and infectious wastes, especially at the community and household levels 	
Human Health and Social Work	<ul style="list-style-type: none"> • Ensure proper interment of pandemic victims while carrying out the required health and sanitary protocols, and provide training programs for owners and workers of funeral parlors/homes on these protocols • Improve the status and supply of Human Resources for Health (HRH) • Intensify public health education campaign, including effective risk communication • Strengthen and expand telehealth system 	
MSMEs	<ul style="list-style-type: none"> • Build MSMEs' resilience through capacity building on formulating and implementing business continuity plans • Develop digital skills for those in MSMEs; Support digitization of MSME operations; Enable knowledge transfer and information- sharing between MSMEs, through: <ul style="list-style-type: none"> ○ Up-skilling/Re-tooling ○ Digital solutions for MSME operations (e.g., e-payment, chatbot, customer management, etc.) ○ Webinars or trainings on business continuity, supply chain management, and intellectual property 	<ul style="list-style-type: none"> • Development of MSME-oriented industries
OFWs	<ul style="list-style-type: none"> • Retooling of skills or upskilling for repatriates • Increased fund allocation for reintegration programs 	<ul style="list-style-type: none"> •

Sector	We Recover as One	Balik Probinsya, Bagong Pag-asa Program
Education and Labor	<ul style="list-style-type: none"> • Expand and institutionalize flexible learning options • Pursue adult learning through online and/or blended learning • Prioritize investments in online platforms • Retool the labor force 	<ul style="list-style-type: none"> • TVIs shall be built in strategic rural areas • Access to Open Distance Learning shall be enhanced • Individuals and enterprises shall be provided assistance to educational programs, including internet-based learning • Integration of institutional assistance through progression of formal education
Cross-cutting	<ul style="list-style-type: none"> • Empower LGUs, starting at the barangay level, and strengthen their capacities as first responders and frontline service delivery units. 	

IV. Conclusion and Way Forward

In summary, as the impact of the pandemic is felt by all sectors, the policy responses by the government should ensure that it is responsive to the challenges brought by the pandemic. While it caused negative impact to various sectors, the government together with other stakeholders should also look into the opportunities, which can be the focus of efforts that will be delivered to the public.

TESDA as the authority in technical-vocational education and training (TVET) has to consider the development of programs on sectors that have advantages and opportunities during this time of pandemic. It may include the re-alignment of funding allocations, development of training regulations, capability-building program of trainers, adoption of flexible and dynamic approaches, utilization of new training modalities, establishment of partnership with relevant organizations/institutions, among others.

Given the information/data provided in this paper concerning sectors with advantages and opportunities, it is recommended that TESDA to consider the following sectors in the development and enhancement of programs:

Sector	Recommendation
Wholesale and Retail Trade, repair of motor vehicles and motorcycles	<ul style="list-style-type: none"> • Work with the DICT and industry players in the development and promulgation of training programs on e-commerce
Manufacturing	<ul style="list-style-type: none"> • Tap training providers offering Dressmaking and Tailoring courses for the manufacturing of PPEs and face masks. PPEs to be worn by the health workers, while face masks to be worn by all persons when in public areas. • Work with the DTI and other relevant stakeholders on the necessary training for the production of essential goods, raw materials and packaging
Tourism	<ul style="list-style-type: none"> • Work with the Department of Tourism and the tourism and related industries' stakeholders in the review and updating of TRs/training programs to align with the amended National Accreditation Standards
Construction	<ul style="list-style-type: none"> • Continue the development of training programs that will allow for the adoption of digital technologies • Continue to train workers that are required for the infrastructure projects, i.e. Build, Build, Build
Agriculture, Forestry and Fishing/ Agribusiness	<ul style="list-style-type: none"> • Promote training programs that will improve agricultural production, especially through the use of modern agricultural machineries/farm mechanization, backyard farming. • Undertake technology researches on agriculture • Incorporate online marketing in agro-entrepreneurship trainings
Information and Communication	<ul style="list-style-type: none"> • Utilize the scholarship fund for the reskilling and upskilling of workforce
Utilities	<ul style="list-style-type: none"> • Work with relevant stakeholders in the development of training programs that will address the proper handling of health care and infectious waste
Human Health and Social Work	<ul style="list-style-type: none"> • Work with relevant stakeholders in the development of training programs that will address the proper interment of pandemic victims • Work with the DOH and other relevant stakeholders in developing and implementing training programs to capacitate the human resources that are required to combat this pandemic and provide critical care to those who are inflicted with the illness, as well as providing the training necessary to enable telehealth
MSMEs	<ul style="list-style-type: none"> • Develop and offer training programs that will enhance the digital skills of MSMEs
OFWs	<ul style="list-style-type: none"> • provide free training programs for repatriated overseas workers, especially those who wish to be immediately employed in sectors that will require workers during the pandemic
Education and Labor	<ul style="list-style-type: none"> • Flexible Learning Arrangements will be pursued through the TESDA Online Program (TOP) and other flexible modes of learning, processes, and systems • Additional courses will be developed and be made available in the TOP • Build up technology-based systems, tools, and processes to ensure continued delivery of training programs • Provide scholarship programs for the upskilling and reskilling of individuals
Cross-cutting	<ul style="list-style-type: none"> • Capacitate frontliners at the barangay level through the provision of Barangay Health Services training, incorporating the COVID-19 Infection Prevention and Control (IPC).

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