



ข่าวเศรษฐกิจและสังคม

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Thailand's Social Development in Q1/2017

The Office of the National Economic and Social Development Board (NESDB) released the official report on Thailand's social development in the first quarter of 2017. The key social highlights included in this quarter are overall improvement in mental health of Thai people, a decrease in the number of patients diagnosed with diseases under surveillance and dengue fever, improved nutritional status of young children, breast-feeding and teenage pregnancy situations, a decline in alcohol and cigarette consumption expenses, improvement in overall safety in life and property of citizens. However, there are still some concerning issues which need to be closely monitored, including the employment and unemployment situations, the slightly declined in labor income, road traffic accidents with increased number of casualties during Songkran festival, public transport users' protection and skilled workforce preparation for the potential targeted industries in the future. Details of the key social situations are elaborated as follows.

Employment declined and unemployment rate slightly increased, while labor productivity increased.

For Q1 of 2017, employment in the agricultural sector persistently declined as more labor were continuously seeking employment in the non-agricultural sector from the periods of 2014-2016 due to the severe droughts, together with the consistently declining number of replacement labor and aging workers. As for the non-agricultural sector, a decline in the employment was recorded in both the manufacturing and constructions sectors, as a result of the only partially recovered export sector and private sector investment. Employment in the retail/wholesale, hotel and restaurant, and transport/warehouse sectors, however, increased, following the expansion of both domestic consumptions and tourism sector. The unemployment rate was recorded at 1.2 percent, while the real wage in the private sector (excluding overtime pay and other benefits) slightly decline by 0.9 percent. However, wages in the agricultural sector rose by 5.2 percent and labor productivity did so by 4.0 percent.

The following issues are be expected to have on-going implications, including:

1. **The movements of labor in the agricultural sector and the sector's adaption:** employment in the agricultural sector has consistently been on the decline due to the on-going labor market structure. The sector has seen the continuously declining number of labor by 1.3 million people during the past 4 years, 0.99 million of which are those aged among 30-34 years old. Such the decline is be expected to be due to the

persistently severe droughts, causing people to seek for employment elsewhere outside the sector. Furthermore, the numbers of both replacement labor and labor aged 50 years and over have been estimated to be on the declining end. Declines in cultivated areas have also been recorded, with occupied lands for agriculture shrinking to just 149.2 million Rais in 2013, compared to that of 151.0 million Rais in 2003, equivalence of 0.16 million Rais reduction per annual on average. These figures reflect the shrinking of the sector, in both the number of labor and cultivated lands. Therefore, increases in productivity in the sector is considered to be crucially important, with a number of key issues needed to be fast implemented this year, as reflected in Ministry of Agriculture and Cooperatives' policies, including large scale farming, Zoning by Agri-map, irrigation system improvement, with the employment of the New Theory farming and Integrated Farming System principles to push forward such goals, as well as smart farmer development program.

2. The slow recovery of export sector and private investment sector has impacted employment. Despite the gradually continuous export expansion since Q3/2016, however, such recovery has been relatively slow, with the export value being lower than that of the years 2012-2013. Moreover, the private investment sector has also demonstrated similarly slow recovery, causing businesses to slow down with their additional hiring. Nevertheless, the confidence among businesses has been improved, as the index increased from 48.7 in 2015 to 49.6 in 2016 and 50.8 in Q1/2017. It has been forecasted that businesses would have more confidence, if export increases as planned as the average of 3.6 percent growth, following the anticipated global economic recovery and the public spending acceleration, especially in the infrastructure projects. Such improved level of confidence among businesses will, therefore, lead to employment growth in the near future, especially in the manufacturing, construction and retail/wholesale sectors, which in turn would help lower unemployment rate.

3. Promotion of the insurance scheme under the Article 40 of the Social Security Act. Self-employed individuals should be actively encouraged to be part of the insurance scheme under the Article 40 of the Social Security Act. Recently, the Cabinet's Resolution endorsed the increases in entitlements of those participating in the Article 40, aiming to incentivize more self-employed people and informal sector workers to become members of the Social Security Fund. Such improvement in the

Labour Force Survey in Q1/ 2017

	2015	2016					2017
	year	Q1	Q2	Q3	Q4	year	Q1
Total labor force (Millions)	38.5	38.3	38.2	38.7	37.9	38.3	38.2
1. Employed (Millions)	38.0	37.7	37.4	38.3	37.4	37.7	37.4
(%YoY)	-0.2	0.2	-0.9	-0.2	-2.5	-0.9	-0.6
1.1 Agriculture (%YoY)	-3.6	-2.7	-6.2	-2.3	-6.0	-4.3	-1.4
1.2 Non-agriculture (%YoY)	1.6	1.5	1.4	0.9	-0.7	0.8	-0.3
2. Unemployed (Millions)	0.3	0.4	0.4	0.4	0.4	0.4	0.46
Unemployment rate (%)	0.88	0.97	1.08	0.94	0.97	1.0	1.2
3. Seasonally inactive labor force (Millions)	0.2	0.3	0.4	0.1	0.1	0.1	0.3
Share to labor force (%)	0.5	0.7	0.9	0.2	0.3	0.5	0.8
Source: National Statistical Office							

entitlements, which has been in effect since 1st May 2017, include compensation of 300 Baht a day in case of hospital admission, with the maximum payment not exceeding 90 days, and compensation of 200 Baht a day in case of outpatient treatments, but need to take time of work with the minimum of 3 days, increases in medical services, such as reimbursement expansion of 20,000 Baht to 30,000 Baht for the treatment of Hemodialysis and Continuous Ambulatory Peritoneal Dialysis. Therefore, it is important to publicize such improvement in the entitlements to the general public in order to attract more people into the fund.

The mental health of Thai people has been considered to be in a good condition, in accordance with the World Happiness Report. According to the Mental Health Survey (Happiness) conducted by the National Statistical Office, it was found that in 2015 the mental health among Thai people was up to par with the international standard, with the average score of 31.44. Population in the 25-59 age group demonstrated the highest average score compared to other age groups, followed by those in the 15-24 age group and those aged 60 years and over. The survey also revealed that love, family ties and attentions among family members greatly contributed to such good condition of the mental health. The 2015 survey's mental health score is in line with that of the World Happiness Report 2017 which ranked Thailand as the world's 32nd happiest nation during 2014-2016, compared to the ranking of the 33rd during 2013-2015, and as the 19th of the top 20 gainers.

The overall number of patients diagnosed with diseases under surveillance declined, however, those diagnosed with foodborne and waterborne diseases increased and need to be further monitored. The total number of patients under disease surveillance declined in Q1/2017 from Q1/2016 by 22.7 percent, with those diagnosed with dengue fever impressively declined by 44.7 percent, attributable to the on-going collaborated attempts by all related parties in monitoring, preventing and quarantine the common house mosquito related diseases. However, the spreading of foodborne and waterborne diseases still needs to be further monitored in the next quarter, as the number of patients diagnosed with such diseases rose by 3.2 percent. Furthermore, the number of drowned school age children during the school breaks, which are usually the time with the highest number of drowning cases with an average number of 348 cases, in 2017, as reported by the Department of Communicable Disease Control, so has been about 127 cases, all of which are children aged between 5-14 years old.

The situations of nutritional status of young children and breastfeeding have demonstrated a good improvement. According to the Multiple Indicator Cluster Survey (MICS 5) 2015-2016, it revealed that the nutritional status of young children in such periods compared to that of 2012 (MICS 4) overall improved, as reflected in all indices. However, continuous monitoring is still needed to be in place, especially among children aged below 5

years old, as 6.7 of them weigh less than the standard weights, 5.4 percent have acute malnutrition (underweight), 10.5 percent suffer from chronic malnutrition (stunting) and 8.2 percent are obese. As for the status of breast-feeding, it was found that the number of breastfed infants aged 0-6 months old has been on the rise, as 23.1 percent of those infants consume only breast milk, while 42.1 percent have breast milk as their main source of food. However, a close monitor of uneducated mothers is needed, as 0.2 percent of such mothers consume only breast milk.

The number of teenage pregnancy declined, however, is still relatively high and needs a close and continuous monitoring. The birth rate of female aged 15-19 year per 1,000 women in this age group continuously declined from 53.4 in 2012 to 44.8 in 2015. Nevertheless, the birth rate of teenage women is still considerably high, with 5 provinces having the birth rate higher than 60.0, including Chonburi, Nakhon Nayok, Rayong, Prachuap Khiri Khan and Samut Sakhon. Moreover, students contracted Sexually Transmitted Infections (STIs) have been on the rise, making it crucially important to have this issue closely monitored. As for abortion among teenagers, it was found that 53.1 percent of those who had abortion are aged less than 25 years old and 28.6 percent are still students.

Expenditures on alcohol and tobacco consumption have decreased but impacts of second-hand smokers and drinking must be monitored closely. Expenditure on consumption of alcoholic beverage from first quarter of 2017 was estimated at 38,544 million baht, a 3.2 percent decline from the same period last year. Consumption expenditure on tobacco was registered at 14,972 million baht, a decrease by 1.2 percent compared to the previous year. However, impacts of second-hand smokers and drinking that affect both mental and physical health of others must be monitored closely. Relevant agencies have come up with campaigns to raise awareness about direct and indirect effects of smoking in order to help people quit smoking and change their behaviors. The target is to encourage 3 million smokers to quit smoking in 3 years.

Overall crime cases continuously declined due to tighter measures of crime-suppression. Crime cases came down by 2.6 percent in the first quarter of 2017 compared to Q4/2016. Violence against property cases, and narcotic and drug related cases fell by 13.5 percent and 0.3 percent, respectively. On the other hand, life, physical and sexual offence cases rose by 0.3 percent. Immediate measures have been taken recently to prevent crimes which have significant impacts on overall society. They include (1) prevention, suppression, treatment and rehabilitation of drug addicts using human rights-based approach and behavioral therapies under the concept “understand, approachable, reliable”. This will consequently enable them to reintegrating back into society. (2) human-trafficking related prostitution, in which relevant agencies must take action in strictly enforcing the law, curbing

illegal prostitution, prosecuting government officials involved in such crimes and protecting the victims. And (3) fraudulent business and cybercrime that adversely affect economic system and citizens at all level must be investigated deliberately. Victims should report immediately such that actions should be taken to cut in the scam. The public sector should work in an integrative way on proactive interventions to tackle problems by building awareness, investigating suspect's behavior and apprehending the criminal.

Reduce speeding to prevent fatal and severe injury from road accidents. During the first quarter of 2017, the number of road accidents fell by 7.2 percent while fatalities increased by 1.3 percent. The value of loss also fell by 75 percent from the same period last year. During Songkran Festival, number of road accidents and casualties increased by 7 percent and 4.2 percent, respectively. On the other hand, number of fatalities declined by 11.8 percent, particularly the number of death on scene decreased by 50 percent due to the tightening measures on speed-limit enforcement, seat belt legislation, and prohibition of truck-loading crew of more than 6 persons. However, the major cause of accidents continued to be from driving under the influence of alcohol (DOI) and driving with high speed. Therefore, measures to reduce DOI include raising awareness on road safety disciplines, measures to reduce driving with high speed include speed-limit enforcement efforts, immediate prosecution of the offenders and punishment for those who refuse to pay fines.

Customer complaints have been increasing. Office of the Consumer Protection Board (OCPB) and Office of the National Broadcasting and Telecommunications Commission (NBTC) reported that the number of complaints have increased by 3.2 percent and 11.6 percent, respectively from last quarter. The majority of complaints are related to cars, condominium and general products and service. In term of communication services, the most complaints are specific to mobile phones regarding standards and quality of services. OCPB and NBTC have managed to resolve problems and collaborated with both public and private agencies to investigate poor quality of products and services in order to protect benefits of consumers. Due to technology advancement, patterns of consumption have changed drastically such as taxi services via applications. Some of which have not had regulations, hence not protected regarding safety and consumer exploitation. Therefore, measures to respond to the changing in consumption patterns must be addressed.

Article: "Capacity Building for Thai Workers in the Future: Existing Industries under the First S-Curve"

The economic transformation toward the use of innovations and technologies for development, as well as the rapid change of technologies, has influenced the pattern of production and the demand for labors in both education sector and changing skill. The labors are required to have skills for this need in order to adapt to the transformation and lessen

occurring impacts; however, today 35 percent of workforce in firms only completed ninth grade or lower. The majority of the workers are semi-skilled or skilled. Their competences are yet lower than the expectation of the entrepreneurs, especially in terms of language proficiency, vocational practices/law and science and new technology knowledge.

Based on the survey findings about labors in five First S-curve industries, such as automobiles and their parts, electronics, agriculture/rubber production and rubber products, food processes, and tourisms, in 1,353 examples of labors with vocational certification and higher and 239 examples of entrepreneurs in ten provinces found that (1) in terms of Thailand 4.0, 63 percent of workers acknowledged the idea of Thailand 4.0, yet they had dissimilar understandings. On the other hand, 80 percent of the entrepreneurs agreed with the concept of Thailand 4.0. They thought that Thailand needed mobilization, although they still had concerns about SMEs sectors, where there were limitations and the sectors might not be able to progress as fast as the occurring development. Thus, the government needs to have a clear practice direction to promote and support this sector; (2) in term of labor skills; the entrepreneurs said that the workers had high level of skills, except that English and research skills had medium level of skills. Recent graduated workers had lower skills than experienced workers in all fields, which conformed to worker self-evaluation on English skills that said 50 percent of them needs to improve their English since they were unable to communicate in English. On the other hand, in terms of information technology, the majority had computer skills, yet they were lack of material formation. Accordingly, the entrepreneurs suggested including materials, such as languages, field practices and new technology usage in institutes' curriculum.

Nonetheless, the concept of Thailand 4.0 have several limitations, since the industrial sectors are lack of skilled workers, the new workers do not meet the requirements, the acknowledgement and understanding about Thailand 4.0 are still ambiguous, and there are lack of new technology, innovation investment and infrastructure readiness. Therefore, the government should execute as follow.

1. Establish the cognition relating to impacts from technology changes and the direction to mobilize the economy and development to achieve "Thailand 4.0." Every sector has similar understanding when communicating in order to build acknowledgement and lead to capacity building in every segment.

2. Advance workers' skills through supporting cooperation and developing the design of curricula to directly serve each cluster in the industrial sector. For example, add some skills, such as digital and big data management skill, while simultaneously develop working attributes, such as analyzing skill, combining technology skill and proper area surveying skill, creativity, various adjustable abilities, well-adapted skill and team building skill.

3. Develop workers' skills in each cluster by dividing into groups in order to develop inclusively and appropriately in accordance with each skill-level, such as unskilled workers and the disadvantaged, elderly workers, agricultural workers and business or small enterprise workers, and minimize impacts and inequality for workers in among indicating clusters and create the economic value.

4. Plan for production and education quality improvement by collaborating between firms and educational institutions to develop curricula, provide engines and tools in teaching and create workers that meet standards and are workable. Develop education quality in various fields, such as core knowledge, work ability in accordance with changing technologies, analytical ability, creativity, brain power, innovation and appropriate attributes building, including positive attitudes, tolerance, responsibility and work for achievements.

5. Support other elements such as infrastructure, the development of innovations and technology in production that are suitable, reachable and useful, especially to SMEs, match/found the cooperation between startup creators and entrepreneurs, in order to produce a new product or a new service. Moreover, encourage the formation of learning culture in every organization/institution by beginning at families, schools, workplaces, communities etc., through building learning environment that creates inspiration, promotes creativity, creates public consciousness and emphasizes on work achievements.

Office of the National Economic and Social Development Board

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Key Social Indicators

Components	2015	2016	2015				2016				2017
	Year	Year	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
1. Employment ^{1/}											
Workforce (Thousands)	38,548	38,267	38,279	38,404	38,767	38,744	38,312	38,160	38,683	37,911	38,216
%YOY	-0.07	-0.7	-0.45	-0.10	-0.1	0.4	0.1	-0.6	-0.2	-2.1	-0.3
Employed person (Thousands)	38,016	37,693	37,612	37,752	38,330	38,371	37,684	37,394	38,263	37,430	37,443
%YOY	-0.16	-0.9	-0.53	-0.17	-0.2	0.3	0.2	-0.9	-0.2	-2.5	-0.6
Unemployed person (Thousands)	340.6	377.5	361.3	336.1	356.0	308.8	369.9	411.1	362.5	366.3	463.4
Unemployment rate (%)	0.88	1.0	0.94	0.88	0.92	0.8	0.97	1.08	0.94	0.97	1.21
Underemployed person (Thousands)	272.5	274.9	281.2	277.2	250.9	280.8	292.9	351.8	217.3	237.4	335.6
2. Health and illness											
Number of patients under disease surveillance (cases) ^{2/}											
- Measles	1,015 (-14.3)	1,688	(66.3)	224	236	276	221	271	466	730	367
- Meningococcal Meningitis	25 (78.6)	17	(-32.0)	4	6	9	6	5	4	2	5
- Japanese encephalitis	632 (6.4)	772	(22.1)	164	144	146	179	187	231	175	259
- Cholera	108 (800.0)	51	(-52.7)	2	2	4	41	2	7	1	2
- Hand, food and mouth	41,392 (-37.1)	79,910	(93.1)	9,217	7,771	14,594	10,066	19,012	39,589	11,243	11,450
- Dysentery	7,042 (-13.1)	6,726	(-4.4)	1,804	1,956	1,774	1,820	1,841	1,887	1,178	1,329
- Pneumonia	216,959 (8.0)	245,211	(13.1)	56,556	42,176	57,754	65,661	45,244	72,851	61,455	63,869
- Leptospirosis	2,151 (-49.4)	2,295	(6.7)	283	393	723	446	401	671	777	573
- Dengue fever	144,952 (53.6)	63,931	(-55.9)	7,538	24,409	60,768	14,840	7,874	25,744	15,473	8,203
- Influenza	77,926 (52.1)	169,362	(117.3)	24,206	10,840	18,397	43,634	14,135	58,535	53,058	19,742
- Rabies	5 (-16.6)	13	(-160)	1	1	2	4	2	5	2	0
Rate per 100,000 population of death with major chronic non-communicable diseases											
- High blood pressure	12.1 (10.8)	n.a.	No quarterly data available								
- Ischaemic heart disease	29.9 (7.5)	n.a.									
- Cerebrovascular disease	43.3 (11.9)	n.a.									
- Diabetes	19.4 (10.9)	n.a.									
- Cancer and tumors	113.7 (5.5)	n.a.									
3. Social security											
- Patients from road accidents (cases)	6,271	8,259	1,629	1,542	1,356	1,850	2,275	1,838	1,797	2,457	2,304
- Crime against person (cases)	25,602	20,218	6,020	6,531	5,901	6,681	6,415	6,140	5,606	5,106	5,120
- Property crimes (cases)	48,770	38,964	10,885	12,690	12,960	11,792	18,796	16,792	18,402	17,543	15,167
- Narcotics (cases)	279,266	270,595	82,998	66,667	64,632	64,900	65,493	61,029	70,330	77,880	77,627
4. Consumer protection ^{3/}											
4.1 Number of complaints (cases)											
- Advertisement	2,875	2,637	632	753	742	748	727	795	509	606	548
- Label	2,552	2,010	572	726	614	640	704	559	387	360	618
- Contract	1,119	1,628	260	272	253	334	457	373	298	500	432
- Law	6	37	4	1	1	0	25	12	-	0	0
- Direct sales and direct marketing	566	1,097	54	159	177	176	120	244	550	183	103
4.2 Hot line 1166 (cases)	49,708	47,329	12,293	12,300	12,865	12,250	11,666	10,555	12,438	12,670	12,071

Source: 1/ Labor force survey report, National Statistical Office, Ministry of Information and Communication Technology

2/ Bureau of Epidemiology, Department of Disease Control, Ministry of Health

3/ Office of the Consumer Protection Board, Office of the Prime Minister