

PREVENTING A 'LOCKDOWN GENERATION' IN EUROPE AND CENTRAL ASIA

Building resilient societies with
young people in the era of COVID-19



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Design and Layout: QUO

Editing: Barbara Hall

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FOREWORD

The global pandemic of COVID-19 has taken a significant human toll as millions worldwide face illness and death. The pandemic has affected all populations and generated a multiplicity of deep crises, often exacerbating inequities and fracture lines within and across societies. Many people across all countries are finding themselves deeply concerned about their health, destitute or just one pay-check away from poverty; limited in their interactions and mobility; and challenged by everyday efforts to adapt to rapidly changing realities and to build their resilience. The consequences of the pandemic on health, economic, social, geo-political and many other aspects of human life are still difficult to predict, especially as it continues and accelerates relentlessly.

The younger generations have been among those most socially impacted by the pandemic, but also the most prepared to cope with the quick shift towards virtual environments that the pandemic triggered. For many young people, COVID-19 interrupted their schooling and left them jobless, and is still making it more difficult to integrate into the labour market. With school closures and uncertainty about their futures, many feel isolated, facing increased levels of stress, anxiety and depression. Yet, the younger generations are also the most prepared to face the hasty shifts towards an online environment where schools and jobs abruptly have moved from real to virtual spaces, and have shown a true readiness to adapt to these changes at a rapid pace.

In the face of this situation, the United Nations Children's Fund (UNICEF) and the European Training Foundation (ETF) joined forces to look at the challenges, opportunities and, most importantly, the views, sentiments and opinions of young people concerning their current and future prospects in the era of COVID-19. The purpose of these inquiries and the subsequent report based on them is not only to give voice to young people and strengthen dialogue with them, but also to ensure that their ideas inform the many overdue transformations in the ways the labour market and education systems function, and to identify ways that they can contribute towards adjustments in policies and service delivery.

This report builds on wide consultations with more than 15,000 adolescents and young people from Europe and Central Asia covering, among others, their feelings about lockdown restrictions, access and participation in education, learning outcomes and the quality of teaching, as well as their views on mobility, entrepreneurship and participation. When it comes to the future, the report captures young people's hopes and fears about deep changing societies and economies.

Optimism, solidarity, anxiety and fear of uncertainty emerge equally from the consultations. Many young people seem prepared to thrive in an online context for learning, working and social engagement. Others experience isolation and felt disconnected from their peers and teachers, raising important mental health and wellbeing concerns. The overall perceptions of young people about the economic prospects in the context of COVID-19 are negative. However, technological progress and wider access to knowledge and skills are among the reasons why young people seem to remain positive and hope for a brighter future. On-the-job training, work experience schemes, career counselling and entrepreneurship score high among young people's choices for the best ways out of joblessness.

Building resilience is the key message emerging from the report and it refers to young people, parents, teaching staff and society overall. The report puts forward several policy proposals aimed at strengthening youth participation, social cohesion and inclusion. It reimagines education and training policies, and proposes solutions for re-building job opportunities amidst the COVID-19 crisis and recovery. This provides a basis for identifying policy and structural reform priorities that will create a better ground for coping with the effects of the crisis on youth and preparing the recovery.

It emerges clearly that governments, social actors and the international community need to act now to respond to these needs and mitigate the negative impacts of the COVID-19 pandemic, which risk affecting young people for years to come. Acting now with considered support will help to boost the competence, confidence and resilience of youth to give them a better opportunity to build a solid, fair and inclusive future.

The ETF will use the findings of this report in its work as an agency of the European Union (EU), helping EU neighbouring countries to reform their education and training systems. An important part of this goal is to increase employability levels of their graduates in the context of the EU's external relations policies.

UNICEF will use the findings of the report in its work as part of the United Nations system to reduce inequities in access to education, and to ensure quality learning in the transition towards online learning. UNICEF will also support national and local authorities, and work with young people to co-create policy and programming environments that favour the full engagement and participation of youth in all issues affecting their lives. The aim of building effective mechanisms and platforms for dialogue and for engaging children, adolescents and youth is to allow not only to develop skills and competencies, but also to help influence decisions on how education systems operate, and on the future of jobs or on issues of climate and the environment. This engagement will also provide youth with a strong sense of meaning and connectedness because they will be able to actively contribute towards increased social cohesion and wellbeing of their communities.

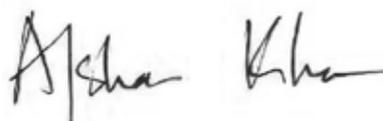
We commend all the efforts to date by countries in the region to manage the health and socio-economic impacts of COVID-19 and secure access to education for all learners. As we look forward, UNICEF and ETF, working together and in collaboration with other United Nations agencies and European institutions, and regional and national partners, seek to contribute towards mitigating the learning losses and other serious consequences of COVID-19 that the current generations of pupils and students, particularly the most vulnerable, are facing. We also seek to help build new prospects for learning and skills-building, including by improving access to and quality of online learning spaces. Combined with deep shifts in job opportunities, rising income inequalities and poverty risks, the incomplete learning processes resulting from COVID-19 could lead to losses in motivation, adaptability and employability, and towards social exclusion of the next generations of young workers, which needs to be avoided.

But most importantly, ETF and UNICEF remain strongly committed to continue working together with young people and to help foster policy and programme developments aimed at creating better opportunities so that the current generation of youth will not become a lockdown generation. Our collective goal is to continue to provide support to build a resilient generation, one that can realize its full potential and make a true contribution towards a more inclusive, equitable, peaceful, sustainable and prosperous future in Europe and Central Asia.



Cesare Onestini

Director
European Training Foundation



Afshan Khan

Regional Director
UNICEF Regional Office for Europe and Central Asia

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It is our hope that these voices will be heard and will inform dialogue and policymaking processes towards more resilient, inclusive and greener societies in Europe and Central Asia.

Disclaimer: The findings, interpretations and conclusions expressed in this report do not necessarily reflect the views of UNICEF and the ETF.

¹ U-Report is a free, real-time social messaging tool that allows young people to speak out on issues that matter to them.

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ABBREVIATIONS AND ACRONYMS

DDL	Digital distance learning
EBRD	European Bank for Reconstruction and Development
ECA	Europe and Central Asia
ECARO	Europe and Central Asia Regional Office
ETF	European Training Foundation
EU	European Union
GDP	Gross domestic product
G&I	Greece and Italy
ICT	Information and communications technology
ILO	International Labour Organization
LFS	Labour Force Survey
NEET	Not in Education, Employment or Training
OECD	Organisation for Economic Co-operation and Development
PISA	Programme for International Student Assessment
SCEE	South Caucasus and Eastern Europe
SEEU	South Eastern European Union
SME	Small and medium-sized enterprise
TVET	Technical, vocational education and training
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children’s Fund
WBT	Western Balkans and Turkey
VET	Vocational education and training

REGIONAL CLASSIFICATION

USED IN THIS REPORT

The report covers 23 countries and territories in Europe and Central Asia: Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Greece, Italy, Kazakhstan, Kosovo,² Kyrgyzstan, Moldova, Montenegro, North Macedonia, Romania, Serbia, Tajikistan, Turkey, Turkmenistan, Ukraine and Uzbekistan.

For the purpose of the regional analysis, four geographic sub-regions were identified: **Western Balkans and Turkey (WBT)**, **South Eastern European Union (SEEU) countries**, **South Caucasus and Eastern Europe (SCEE) and Central Asia (CA)**. **Greece** and **Italy** were used as comparator European Union (EU) countries with potentially large spillover effects on the countries of Europe and Central Asia (ECA).

There is also a political-based rationale for this classification. Six countries from the SCEE sub-region are **Eastern Partnership/EU Neighbourhood countries**, because they are all key partners within the European Neighbourhood Policy and the Eastern Partnership initiative of the EU. Six Western Balkan countries and Turkey are on the path towards EU integration and therefore are often referred to as **EU Enlargement countries**.

SUB-REGION	COUNTRY	COUNTRY ISO CODE
Western Balkans and Turkey (WBT)	Albania	ALB
	Bosnia and Herzegovina	BIH
	Kosovo	XKX
	Montenegro	MNE
	North Macedonia	MKD
	Serbia	SRB
	Turkey	TUR
South Eastern European Union (SEEU) countries	Bulgaria	BGR
	Croatia	HRV
	Romania	ROU
South Caucasus and Eastern Europe (SCEE)	Armenia	ARM
	Azerbaijan	AZE
	Belarus	BLR
	Georgia	GEO
	Moldova	MDA
	Ukraine	UKR
Central Asia (CA)	Kazakhstan	KAZ
	Kyrgyzstan	KGZ
	Tajikistan	TJK
	Turkmenistan	TKM
	Uzbekistan	UZB

² Under UNSC Resolution 1244.

EXECUTIVE SUMMARY

Since March 2020, the COVID-19 pandemic has been transforming the world, leading to abrupt shifts in political, economic and societal dynamics. While the crisis is having unprecedented consequences on the lives of people of all ages, the short- and long-term impacts are different across age groups.

This report aims to assess the socio-economic impact of COVID-19 on youth³ in Europe and Central Asia (ECA), particularly in education, employment, mobility and participation. It identifies challenges and opportunities brought by the pandemic. It outlines what can be learned from the crisis to build more resilient systems and societies, and how youth in the ECA region can be engaged in building sustainable, greener, more inclusive and resilient societies in COVID-19 times.

At the core of the report are the voices and sentiments of youth, collected through U-Report polls, surveys and in-depth consultations conducted by the United Nations Children's Fund (UNICEF) in July and August 2020, with the participation of 15,268 youth aged 15–24 from 23 countries in the ECA region. The data collection process was fully adolescent- and youth- centred in its approach. Participatory, gender and age-appropriate activities were used for the focus group discussions, as well as in the process of formulating the U-Report questions. Young people were given the opportunity to express their opinions freely and in a manner in which they felt comfortable, including through ice-breakers, polls, idea clouds and picture cards. The research was governed by a strict ethical and child safeguarding protocol. Researchers requested and obtained the informed consent/ assent of participating youth. In the case of adolescents who had not attained the age of legal majority, informed consent was given by their parent(s)/guardian(s), and informed assent was given by them.

The European Training Foundation's (ETF) regular mappings of country responses to the COVID-19 pandemic in the areas of education and employability provided valuable information for the drafting of the report. The report also uses surveys, administrative data and policy response trackers from international organizations and national sources.

It is important to note that the COVID-19 situation has been evolving and changing extremely rapidly. Some of the data and projections that are used in this report are being systematically updated and adjusted, and may differ across sources. Their purpose in this report is to provide a sense of the main issues rather than conclusive statements about the magnitude of particular effects.

KEY FINDINGS

ECONOMIC AND LABOUR MARKET OUTLOOK: A HIGH-RISK ENVIRONMENT FOR YOUTH EMPLOYMENT

The looming economic crisis. The COVID-19 pandemic has had a large negative effect on economies and labour markets in the ECA region. Economists predict a substantial output contraction in 2020 due to the COVID-19 crisis, with sharp projected GDP declines compared to 2019. Lockdowns and restrictive measures have drastically diminished the economic activity of many enterprises and put people at risk of losing their jobs and incomes. This is especially relevant for women, low-skilled workers, individuals working in the informal sector, and for youth, whose employment is generally more vulnerable. Several economic sectors have been particularly hit by the pandemic in ECA, including transport, tourism, hospitality, food services, entertainment and retail trade, which provide employment for a large share of young workers. Governments have introduced different measures to support enterprises and individual workers, but they are mostly temporary and cannot fully prevent the likely unemployment shocks in the foreseeable future.

Youth are generally more vulnerable to the economic crisis. While younger generations are experiencing lower risks of developing severe physical health symptoms than older age cohorts, the COVID-19 crisis poses substantial risks to their lives, both in the short and long term. For example,

³ This report focuses on youth aged 15–24 (unless specified otherwise).

the pandemic is likely to exacerbate existing labour market challenges in the region. Even prior to the COVID-19 outbreak, young people living in the region experienced double or triple rates of unemployment compared to adults, and worse quality of jobs compared to other age groups. Young people are also among the most affected because they are over-represented in sectors that are hardest hit by the COVID-19 lockdown measures, and because they are typically the first to be laid off by employers.

Rise in youth unemployment and in youth inactivity. In the second quarter of 2020, the unemployment rate of 15–24-year-olds increased compared to the same period in 2019 in most ECA countries where quarterly data on unemployment across age groups are available. Findings from consultations with youth in the region confirm a worrying picture with regard to the immediate impact of the crisis on youth employment. Available statistics from labour force surveys show that the economic downturn and decline in employment opportunities in the second quarter of 2020 have led not only to a higher youth unemployment, but also to a substantial increase in youth inactivity in almost all ECA countries. If young people are inactive for reasons other than education and training, and stay outside the labour force for a long period, there is a high risk of long-term labour market disadvantages in the future.

Youth's perceptions about the post-COVID-19 economy. Youth's perceptions of the post-COVID-19 economy of their countries are generally negative, and pessimism tends to prevail. Participants of the in-depth consultations associated the post-COVID-19 economic scenario with negative words such as crisis, chaos, challenge(s), problem(s), closure, limits, loss, awful, terrible, ruined, fragile, sad and confusion. They mainly expressed uncertainty about the future of the economy, fearing a negative impact of current decisions on their career perspectives, in a context of pre-pandemic high unemployment rates. Uncertain about their future, many young people felt isolated, facing increased levels of stress, anxiety and depression.

Emerging job and entrepreneurship opportunities. Results of the in-depth consultations with youth in ECA reveal that, despite the overall negative perception of the economy of their countries during the pandemic, many of them also see the crisis as an opportunity to start a new business. They see plenty of opportunities for them to get jobs in specific sectors, such as the IT sector (e.g. programming), e-commerce, online education, financial industry and medical care services (e.g. doctors, nurses, psychological support online). Despite this encouraging trend, several obstacles exist. Among the biggest obstacles to starting a business, youth cited the lack of financial support (loans, grants, investors), followed by lack of information on how to start a business, lack of entrepreneurship skills, and fear of failure.

INTERRUPTED EDUCATION: LEARNING LOSSES FOR STUDENTS

Interrupted education and abrupt shift to distance learning: The largest educational experiment. In an attempt to contain the spread of the COVID-19 pandemic, most governments in the ECA region temporarily closed educational institutions. Overall, countries in the ECA region made a tremendous effort to ensure the continuity of learning for all students, pursuing a variety of approaches and tools to mitigate the effect of school closures, and rapidly shifting to remote learning programmes, digital learning tools and capacity building of teachers and trainers in their use. Broadcasting services, particularly television, have been key channels for distance learning. Participation in digital distance learning increased exponentially in many forms through virtual classrooms, learning platforms, on-line repositories, on-line assessment, webinars and recorded video lessons. Given the typical pace of change in education in the region, the rapidity of decision-making and implementation during the first wave of the pandemic has been impressive. Nevertheless, despite all efforts, the COVID-19 crisis revealed that most education systems in the ECA region were unprepared for the shift to digital learning. For the vast majority of educational institutions, this was an abrupt change to a new reality requiring students, teachers, parents and caregivers to adjust rapidly. For some adolescents and youth – in particular those from disadvantaged communities with limited access to technologies, or those with disabilities, chronic health conditions, or learning in minority languages – distant learning brought additional challenges.

Inequities in education were exacerbated. The move to distance and digital schooling has revealed important inequities. The crisis has particularly hit the most vulnerable youth who have limited access to connectivity, technology and learning devices. Adolescents and youth with disabilities, and those affected by mental or learning issues have lacked the extra support from teachers and parents.

The learning loss. Prior to the outbreak of COVID-19 many countries in the region were already facing challenges in terms of the quality and inclusiveness of education. Despite governmental efforts to continue educational provision through distance learning or by moving in-person classes online, youth in ECA revealed that they learned less during the pandemic. The main obstacles to effective distance learning include teachers' lack of online teaching competences, lack of communication between teachers and students, difficulties in keeping students motivated and engaged, and difficulties in learning practical skills online, particularly for vocational education and training (VET) students. Other prominent reasons include low access to technology and the poor content and quality of online lessons.



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Unequipped teachers. Teachers in ECA struggled with the transition of classes to the digital sphere. ICT and Internet access were often insufficient, not only for learners, but for teachers as well. The lack of skills for online teaching was identified by youth in ECA as the number one factor that contributed to making the distance learning process extremely challenging. While recognizing that some teachers made every effort to make the distance learning process as comfortable as possible, the lack of pedagogical skills and the inability of teachers to use interactive methods negatively affected the quality of education during the pandemic. Very often teachers asked students to perform an increased amount of homework and exams with less support. Students felt confused about the real value of their work and the level of their competences due to a perceived unfair assessment system.

The skills gap. COVID-19 has shed light on the need for youth to have the skills for distance learning and to adapt to unstable and unpredictable realities and rapidly changing socio-economic circumstances. Youth in ECA highlighted the importance of flexibility and adaptability to rapidly changing contexts, making the case for accelerating efforts towards a competency-based curriculum in the region. When asked about what tools and skills could have helped them deal more efficiently with learning from home, most youth in ECA agreed on soft skills. Digital skills were also mentioned as fundamental for both students and teachers.

An opportunity for change. Despite the overall negative picture, some youth in the ECA region felt that the shift to online education added flexibility to teaching and learning. For example, distance learning provided more time and increased availability of resources for self-study. Young people also appreciated the opportunity to learn at their own pace, in their private space, and to learn from mistakes by retaking tests. They welcomed the increased opportunities to join online educational and skills-building programmes from all over the world, which would not have been possible prior to COVID-19 due to the high costs of in-person tuition.

Less travel, more digital platforms. The COVID-19 crisis had a highly disruptive effect on the mobility and freedom of movement for young people, and it is likely to reverse an increasing trend of youth mobility in the region, given travel bans and safety concerns in uncertain times. The emergency disrupted youth's ongoing and planned activities, including their engagement in Erasmus+ and similar student exchange programmes. Many of their projects and activities in the areas of education and learning, work, internships and volunteering moved to online modalities, were postponed or cancelled – with negative consequences on their future and their mental health and wellbeing. Nevertheless, youth in ECA highlighted some positive aspects of staying at home, such as increased attention to the environment and the greening of the planet. However, they also voiced concerns that limited mobility can have an impact on stalling peace and democracy in volatile political environments.

THE IMPACT OF COVID-19 ON YOUTH PARTICIPATION AND ON THE WORK OF YOUTH-SERVING AND YOUTH-LED ORGANIZATIONS

Screens and streets: Youth mobilization around global and local causes. Beyond all the negative impacts on many aspects of life, with the COVID-19 crisis there were also some positive changes such as awareness of the interconnectedness among peoples, the importance of the environment and the need for global solidarity increased. The COVID-19 pandemic has led to important geo-political repositioning both within and among countries. The pandemic has presented new challenges to some old concepts, including globalization, established models of governance, global solidarity, and to power, geographic and gender divisions in society. Young people are often at the core of social movements that have emerged, as organizers, influencers and protesters. Their engagement has resulted in increased attention to the situation, needs and opinions of youth in the region, and increased recognition of their power and influence in society.

The COVID-19 crisis as an opportunity for collective action. Youth-led initiatives have been crucial to mitigate the impact of school closures and to support services, addressing loneliness and anxiety, and promoting social cohesion. Youth demonstrated leadership in their communities by initiating and participating in different activities. They volunteered their services to support the most vulnerable, created and disseminated prevention messages through virtual platforms, and promoted adherence to containment measures. Similarly, youth organizations that quickly moved activities to the

virtual space, played an important role in mitigating the disruptions of the crisis by rapidly disseminating information among youth, as well as supporting their mental health and wellbeing.

Spaces for voices: platforms and mechanisms for youth engagement and activation. As the COVID-19 pandemic pushed many aspects of life to the online/digital sphere, it also revealed the vast potential of virtual platforms to act as great 'equalizers' giving an equal chance for many more young people to participate rather than some of the more traditional forms of youth participation. Online platforms allowed many more youth to become involved in youth consultations, dialogue and collective action regardless of whether they were from urban or rural areas, male or female, in high schools or universities, or from poor or wealthy families. Youth in ECA want to be involved in decision-making at the community, national and international levels through more inclusive mechanisms for structured participation, both online and offline.

Youth engagement promoting small actions for planetary changes. As the COVID-19 crisis brought to a halt many aspects of human activity, such as transport and mobility, awareness of climate change and debates also increased. Youth from the ECA region believe that they can play an important role in the post-COVID-19 recovery process by becoming more aware of the impact of their choices on the planet. They believe that attention needs to focus on raising awareness and changing mindsets of people around the climate crisis and the adoption of healthier and environmentally friendly lifestyles. They call for the inclusion of environmental education in formal and non-formal education, allowing for children and youth to obtain the necessary knowledge and skills to adopt sustainable choices and make their homes, schools and communities more environmentally friendly.



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1

COVID-19 IN EUROPE AND CENTRAL ASIA: A PUBLIC HEALTH, ECONOMIC AND SOCIAL CRISIS

1.1. COVID-19 IN EUROPE AND CENTRAL ASIA: CONTEXT AND POLICY RESPONSES

Like all countries around the globe, most ECA countries have taken unprecedented measures to combat the spread of the COVID-19 virus, putting in place stringent lockdown and quarantine measures, and restricting movements of people within and between countries (see Annex Table A-1). Governments imposed very strict measures in the first months of pandemic, including closure of non-essential retail shops and services, mobility restrictions and exceptional precautionary measures at work and in educational settings.

Starting from May 2020 in some countries, or June 2020 in others, regulations on movement and curfew were gradually being relaxed, and almost all business units resumed their activity under sanitary and social distancing conditions. However, in September and October 2020, as infection rates started to increase rapidly again, many countries intensified sanitary measures such as physical distancing and the use of masks, and reintroduced various forms of restrictions and confinement.

When the pandemic started, governments of most ECA countries carried out decisive interventions to mitigate the pandemic restrictions effects on the economy, the labour market and the well-being of households. According to information compiled from the COVID-19 government response policy trackers initiated by the Organisation for Economic Co-operation and Development (OECD), the International Monetary Fund (IMF) and the International Labour Organization (ILO) (see Annex Table A-2), all countries allocated additional sources to their health system to cope with COVID-19, ensured the provision of additional equipment, and introduced tax exemptions or reduced VAT rates on the cost of personal protective equipment (PPE). In addition, frontline health workers were expected to get preferential treatment and receive additional monthly payments in

view of a high risk of COVID-19 infection.

Almost all ECA countries have also implemented short-term fiscal and monetary policy measures to limit layoffs and insolvencies of firms, especially of small and medium-sized enterprises (SMEs) while supporting individuals' incomes. The most frequently used measures include a tax deferral (mainly value-added tax, personal income tax, or social security contribution) for a few months, reduced interest rates for loans, moratoriums on loan repayments and reduced reserve requirements. In addition, different salary support schemes (e.g. additional payments to workers of grocery stores and pharmacies) and partial unemployment benefits were introduced in many countries across the region.

Many countries introduced various measures to support individuals and households, such as reduced rent payments and additional childcare support (mostly for children under 12 years old and/or for children with disabilities), as well as measures for the self-employed or employees of small companies, seasonal workers and employees of the tourism sector. Some of these measures involved assistance to homeless people who are less able to self-isolate by providing secure places to protect them from COVID-19, for example in Turkey and Croatia. Many countries have provided additional support through social protection systems to low-income families and pensioners.

In general, countries have focused on short-term measures, mainly providing income to help individuals and families deal with the shocks of the crisis, as well as business-focused programmes to keep companies afloat and avoid massive job shedding. However, few countries in the region implemented consistent human capital development policy responses, such as boosting upskilling/reskilling or other workforce adaptability measures (ETF, 2020a).

Several countries implemented policy measures to support youth in the COVID-19 context. For example, in Armenia, tuition fees for bachelor and masters programmes were partially paid by the Government, and interest rates for loans were reduced.⁴ Azerbaijan introduced scholarships for those who experienced interruptions in vocational training courses. North

Macedonia and Turkey implemented cash transfers and vouchers for education to primary and secondary school students. Bulgaria provided food schemes for school students. Some countries have helped students from low-income families with access to the Internet and provided personal tablets.

1.2. THE IMPACT OF COVID-19 ON THE ECONOMY AND LABOUR MARKETS IN EUROPE AND CENTRAL ASIA

The COVID-19 impact on the economy

The COVID-19 pandemic has had significant negative effects on the economies of the ECA region through several channels (EBRD, 2020a,c; Figure 1), as follows:

- a collapse in tourism, the airline industry and land transport, retail trade of non-essential goods and hospitality, entertainment, arts, and personal service activities as a result of internal lockdown measures and border closures. Tourism is one of the major channels for economic disruption in Albania, Croatia, Bulgaria, Georgia, Montenegro and Turkey;
- a decrease in exports of oil, gas, metals and other commodities in response to a slowing global demand. This channel is especially important in Armenia, Azerbaijan, Bosnia and Herzegovina, Kazakhstan, Turkey, Turkmenistan, Ukraine and Uzbekistan;
- the plummeting of private consumption, investment and international trade associated with social distancing and lockdown measures, disruption of trade and international supply linkages, and spillover effects from declining sectors, regions and partner countries;
- large volatility and a decline in remittance flows that may be even worse than it was during the 2008–2009 financial crisis due to sharp losses in output, employment and income in the major destination countries for migrants from ECA countries. According to the European Bank for Reconstruction and Development (EBRD, 2020c), remittances from the Russian Federation to Central Asia, Eastern Europe and South Caucasus declined by 29% in the second quarter of 2020 compared to the same period of 2019. Remittances to Serbia declined by 30% in January–May 2020 (year-on-year), with the sharpest declines in April and May (EBRD, 2020c).

Figure 1. Channels through which the COVID-19 crisis affects the EBRD regions



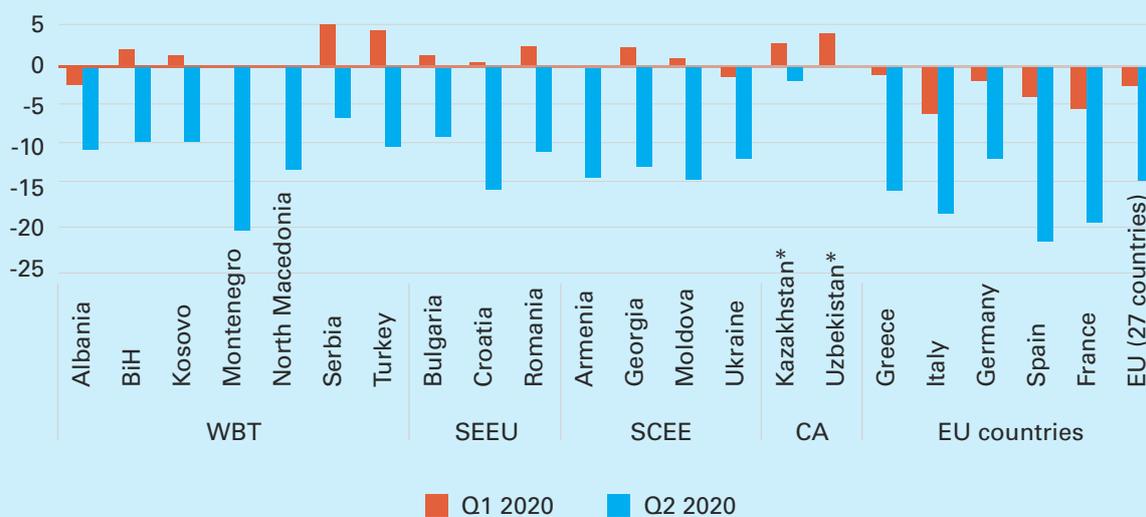
Source: EBRD (2020a), Figure 2.

⁴ Radio Azatutyan, www.azatutyan.am/en.

The new challenges that arise with the COVID-19 pandemic and governments' response have exacerbated other challenges in ECA such as relatively undiversified structures of production and exports, tight fiscal space, limited foreign exchange reserves, high level of informality, high dependence on remittances, political uncertainties, long-standing structural challenges and population ageing (EBRD, 2020 a,b; OECD, 2020 a-c; Kupets, 2020). The duration and longer-term effects of the COVID-19 crisis will depend on the ability of governments to address all of these challenges. Yet, as the crisis continues into the fall of 2020 with important resurgence in numbers of infections affecting all countries, there is growing concern about important losses in the global economy, slow and uncertain recovery in the years to come, and particularly about the uneven impacts within and across countries, as well as on specific segments of the population such as youth, women, informal and migrant workers.

Figure 2 reveals the scale of the recent economic downturn across ECA countries and large European Union (EU) economies in 2020. The real GDP declined in the second quarter of 2020 compared to the same period in 2019 in all countries for which the latest quarterly GDP data were available at the time of drafting this report. The economic output contracted by over 10% in Albania, Armenia, Croatia, Georgia, Moldova, Montenegro, North Macedonia, Romania and Ukraine. Large EU economies where lockdowns tended to be longer and harsher experienced even deeper economic downturn; GDP contracted in the second quarter of 2020, from 11.3% in Germany to 21.5% in Spain. The economic impact of the COVID-19 pandemic was much more modest in Kazakhstan and Uzbekistan, as shown by a small decline of GDP in Kazakhstan and no change in GDP in real terms in Uzbekistan over the first half of 2020.

Figure 2. Quarterly real GDP growth in ECA countries and selected EU countries (% , not seasonally adjusted), Q1 and Q2 2020



Source: Eurostat (North Macedonia, Serbia, Turkey and EU countries), national statistical agencies (other countries).

Note: The figure shows growth rates with respect to the same quarter of 2019. There are no comparable data on quarterly GDP for Azerbaijan, Belarus, Kyrgyzstan, Tajikistan and Turkmenistan.

*Q2 2020 data for Kazakhstan and Uzbekistan refer to the first half of 2020.

Taking into account the first ‘flash’ estimates of quarterly growth rates in the first half of 2020, and assuming a gradual normalization of activity in the second half of the year, the EBRD projected in September 2020 that all economies would contract in 2020 as a whole (Annex Figure A-1). Kyrgyzstan is expected to experience the steepest decline of GDP in real terms (9.5% year-on-year) reflecting high external vulnerabilities, followed by Albania (9%) and Montenegro (9%) due to a collapse in tourism. In contrast, the economies of Turkmenistan and Tajikistan are forecast to contract by 1% in 2020, on the back of strong GDP growth in the first half of 2020 and relatively mild containment measures compared to other Central Asian (CA) countries (EBRD, 2020c).

Although a recovery is projected in 2021 in all ECA countries (Annex Figure A-1), these projections are subject to great uncertainty and significant revisions. Business closures, job losses and/or reduction in household income, depreciation of skills and erosion of fundamental institutions may undermine the potential rate of growth and employment recovery in the medium and long term (EBRD, 2020a,b). Moreover, forecasts are highly sensitive to assumptions relating to the extent of the future social distancing and to government policies (EBRD, 2020c). And yet, the EBRD stresses that the COVID-19 pandemic may also offer opportunities to countries in the region, such as extra reductions in greenhouse gas emissions, greater scrutiny of supply chains and diversification of export bases (EBRD, 2020a). There are also signs of benefits for some sectors such as on-line retail from increased digitalization, with a further boost of activities related to broadband Internet, IT services, and training in digital skills (EBRD, 2020c).

Employment across sectors by contagion risk, ability to safeguard and economic vulnerability

In order to quantify the potential labour market impacts of the COVID-19 crisis in the ECA region, the analysis relies on available statistics on the employment structure of the working-age population by sectors in some ECA countries to assess which countries have greater dependence on the sectors most affected by lockdown measures in terms of

employment and are therefore expected to have more jobs at risk, i.e. jobs with expected reduction in hours or pay, temporary furloughs or permanent layoffs, as defined in McKinsey & Company (2020a).

In parallel, the author classified sectors by economic vulnerability, public health threat and the extent to which they are critical to society, using the McKinsey & Company (2020b) methodology. In particular, sectors were grouped into the five clusters described in Table 1. Clusters 1 and 2 include critical jobs predominantly in the public sector that are least likely to disappear. On the other end of the spectrum, cluster 5 includes jobs in the private sector that are not critical to society but have a high intrinsic risk of spread versus a low ability to safeguard. Therefore, they are the most likely to be severely affected in the short term and probably in the longer term if not supported by temporary targeted relief from the government. Activities included in cluster 3 are more amenable to working from home, whereas activities in clusters 4 and 5, are the least amenable (Hatayama, Viollaz and Winkler, 2020).

⁵ Since national statistical agencies do not typically provide data on employment by sectors and age groups simultaneously, and sectors are often aggregated into broad categories, data were derived from individual-level Labour Force Survey (LFS) data in some ECA countries and available statistics for some other countries from Eurostat. For this reason, the analysis is performed only for a few countries that offer comparable data.

⁶ Since there are no detailed statistics for retail trade for essential goods (food, grocery, pharmacy) vs. non-essential goods, wholesale trade and repair of motor vehicles and motorcycles, we included a broad sector of wholesale and retail trade, repair of motor vehicles and motorcycles in cluster 5, assuming that activities in the sector as a whole are predominantly much less critical for everyday life but have as high a risk of contagion as in the accommodation and food service activities, arts, entertainment and recreation, and personal service activities. For similar reasons, transportation and storage that could not be separated into public and private transport, as in McKinsey (2020b), were classified as critical and risky (cluster 1).

Table 1. McKinsey & Company classification of sectors by contagion risk, ability to safeguard employees and economic vulnerability

Cluster	Short description	Included sectors	Public health threat			Economic threat	
			Intrinsic risk of spread	Ability to safeguard	Criticality	Ability to work remotely	Shutdown resilience
1	Critical, highest risk	Human health and social work activities	More difficult	More difficult	High	Low	High
		Transportation and storage*	More difficult	More difficult	High	Low	Low
2	Critical, but adaptable	Public administration and defence, compulsory social security	Medium	Medium	High	Medium	High
		Education	High	Medium	High	Medium	Medium
3	Medium risk, less critical	Information and communication	Low	Easier	Low	High	High
		Financial and insurance activities	Low	Easier	Low	High	High
		Real estate activities	Medium	Easier	Low	Medium	Medium
		Professional, scientific and technical activities	Low	Easier	Low	High	Medium
4	Adaptable, less critical	Agriculture, forestry and fishing	Low	Medium	Low	Low	Medium
		Industry *. **	Medium (low in utilities)	Medium	Low (high in utilities)	Low	Low (high in utilities)
		Construction	Low	Medium	Low	Low	Medium
		Administrative and support service activities	Medium	Medium	High	Low	Medium
5	Most challenging	Wholesale and retail trade, repair of motor vehicles and motorcycles*	High (medium in wholesale trade)	More difficult (easier in wholesale trade)	High (low in wholesale trade)	Low (low in wholesale trade)	Low (low in wholesale trade)
		Accommodation and food service activities	High	More difficult	Low	Low	Low
		Arts, entertainment and recreation	High	More difficult	Low	Low	Low
		Other service activities	High	More difficult	Low	Low	Low

Source: McKinsey & Company (2020b), Exhibit 7, adapted by the author taking into account the availability of sector-level statistics.

Notes: *There is no information for mining and manufacturing vs. utilities (clusters 4 and 2 in the McKinsey & Company classification, respectively); retail (food, grocery, pharmacy), wholesale, retail discretionary (clusters 1, 3, and 5 in the McKinsey & Company classification, respectively); and transportation (public) vs. transportation (private) (clusters 1 and 5 in the McKinsey & Company classification, respectively).

** Industry includes mining, manufacturing, electricity, gas, steam and air conditioning supply, water supply, sewerage, waste management and remediation activities.

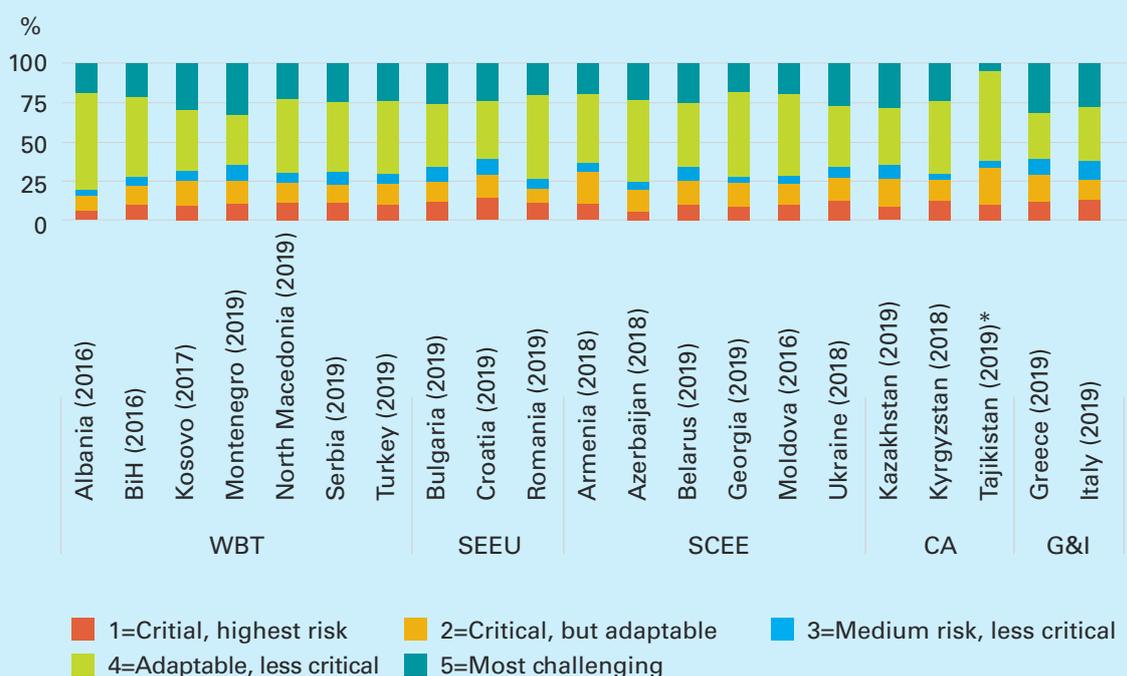
Figure 3 shows the composition of total employment by these clusters in selected ECA countries, and Annex Table A-3 provides the detailed sectoral structure of employment. According to the author's analysis, the largest cluster in all ECA countries, except in Montenegro, is cluster 4 "adaptable, less critical", which includes sectors with low to medium risk of virus transmission and medium ability to safeguard by adopting physical distancing practices and developing hygiene protocols. This is in line with the findings of UNICEF ECARO's 2019 analysis of labour market trends in ECA countries, where the sectoral structure of employment is still biased towards traditional sectors of agriculture, industry and construction (Kupets, 2020).

In the region, there is a fairly small share of modern business services that are less critical to day-to-day functions of society and that are relatively easier to safeguard with basic changes to current business processes and shifting to remote work (cluster 3):

from 3.4% of total employment in Albania to 10.5% in Croatia (the latter is comparable to Greece and somewhat smaller than in Italy).

In contrast, 19% of the total workforce in Georgia to 33% in Montenegro were engaged in sectors with a very high intrinsic risk of spread, that are typically difficult to protect and less essential for society to function, and have low ability to work remotely and a high economic vulnerability (cluster 5). These are the sectors that are the most affected by lockdown measures in most ECA countries (see Annex Table A-1) and that need to adapt their businesses (including implementation of proper safeguarding measures) to reduce the risk of virus spread after relaxations to lockdown restrictions. Many businesses in these sectors, especially SMEs, are struggling to survive while upholding their financial obligations. This has made millions of workers particularly vulnerable to job loss or income reduction.

Figure 3. Composition of total employment by clusters in selected ECA countries (%), latest year available



Source: Author's own estimations based on: secondary data from Eurostat (Montenegro, North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece and Italy; average of quarterly data in 2019); secondary data from national statistical agencies (Azerbaijan, Belarus, Georgia, Ukraine, Kazakhstan, Kyrgyzstan, and Tajikistan); and primary data from the individual-level Labour Force Survey (LFS) datasets (Albania, Bosnia and Herzegovina, Kosovo, Armenia, Moldova).

Note: Definitions of clusters are provided in Table 1. Data for Tajikistan are for formal sector employees (wage and salaried workers) based on statistical reporting by firms. Data for other countries cover employed people, regardless of employment status and formality (based on the LFS).

According to the author's estimations based on employment data before the COVID-2019 crisis in ECA countries, nearly 22 million workers were engaged in sectors defined as the most challenging (cluster 5), predominantly in trade and repair (see Annex Table A-3), almost half of whom live in Turkey (6.7 million) and Ukraine (4.5 million). However, in relative terms, Montenegro is the leader because nearly one in three workers were engaged in the most challenging activities in terms of intrinsic risk of contagion and economic vulnerability, namely: 19.2% in trade and repair; 8.5% in accommodation and food service activities; 2.4% in arts, entertainment and recreation; and 2.8% in other service activities (see Annex Table A-3 for Montenegro).

Taking into account the high incidence of informality and other forms of precarious employment in retail trade and repair, accommodation and food service activities, arts, entertainment and recreation, and personal service activities, it can be assumed that a lion's share of these 22 million workers are at a very high risk of either permanent layoffs or temporary furloughs, and reductions in pay or working hours. The actual number of affected workers will depend on the duration and strictness of lockdown measures, and the resilience of businesses to these measures, which largely depends on their financial performance before and during the crisis, and access to the government's economic support measures. The number of affected workers in other sectors, especially in those belonging to clusters 3 and 4, depends on how large the drop in domestic and external demand will be, as well as the disruption in supply chains and the spillover effects from the most affected sectors and countries due to the COVID-19 crisis.⁷

Foreseeable impacts of COVID-19 on the world of work

According to the ILO (2020a), the COVID-19 pandemic and the subsequent economic crisis are expected to have far-reaching impacts on the world of work across three key dimensions in terms of:

- quantity of jobs and working hours (i.e. both unemployment and underemployment);
- quality of work (e.g. wages and access to social protection);
- effects on specific groups who are more vulnerable to adverse labour market outcomes.

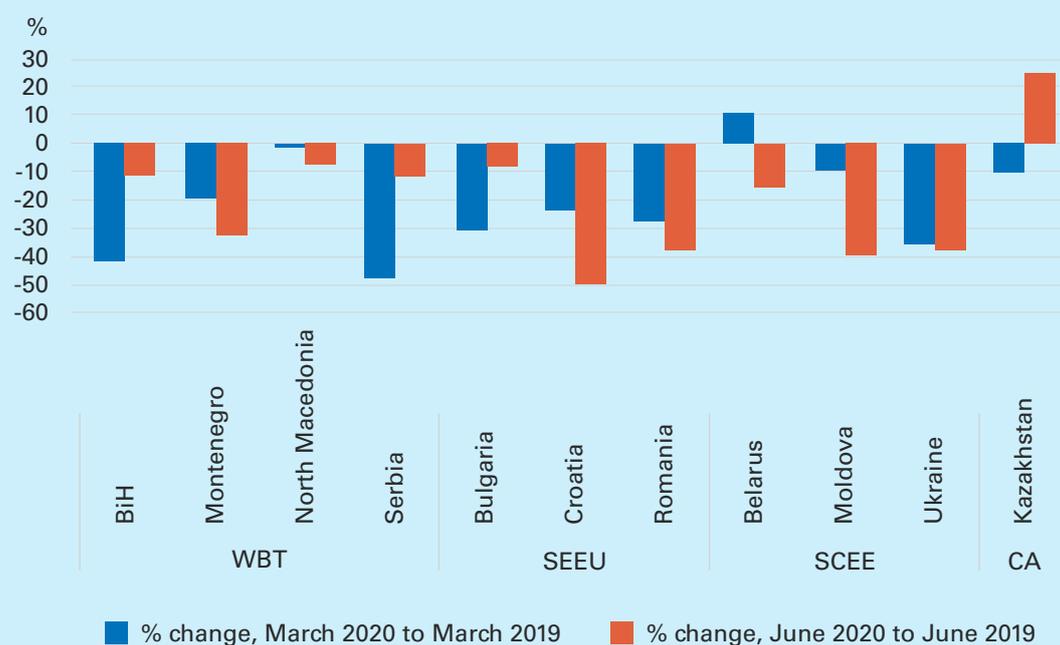
There is evidence from selected ECA countries with available data on vacancies (Figure 4) that, due to the COVID-19-related workplace closure measures, the number of vacancies substantially decreased at the end of March (or the first quarter) 2020 compared to the same period in 2019 in nearly in all countries, especially in Serbia, and Bosnia and Herzegovina. The number of vacancies notified by employers to the national employment agencies further decreased in the second quarter (except for in Montenegro, Serbia, Bulgaria and Kazakhstan), even though, traditionally, many seasonal jobs are jobs in late spring and summer. Some limited statistics on vacancies from private job portals also show a decrease in the number of job offers at the outbreak of the COVID-19 crisis. For example, in Belarus, the number of vacancies posted at the private job portal declined in March–May 2020, with the largest decline in April in sectors such as tourism, hotels and restaurants, entry jobs for students, and jobs in sport clubs and beauty services.⁸ In Ukraine, the number of vacancies decreased by 44% during the first three weeks of the quarantine, and the number of applicants to the number of vacancies increased in all activities in April.⁹

⁷ For example, the IT sector in Ukraine, which showed a double-digit growth for several consecutive years before 2020, is experiencing a slowdown or even decline because it is strongly focused on customers in the United States of America and other Western countries that have been severely hit by the crisis (IT Ukraine Association, 2020a).

⁸ See Tut (2020a, 2020b).

⁹ See weekly economic reviews of the National Bank of Ukraine, published in March–April 2020, for example, https://bank.gov.ua/admin_uploads/article/Weekly_economic_review_2020-04-10.pdf?v=4

Figure 4. Change in number of vacancies in selected ECA countries (%), March/June 2020 compared to March/June 2019



Source: Author's calculations are based on data from Eurostat (North Macedonia, Bulgaria, Croatia, and Romania) and statistics of the national employment agencies on vacancies notified by employers (other countries).

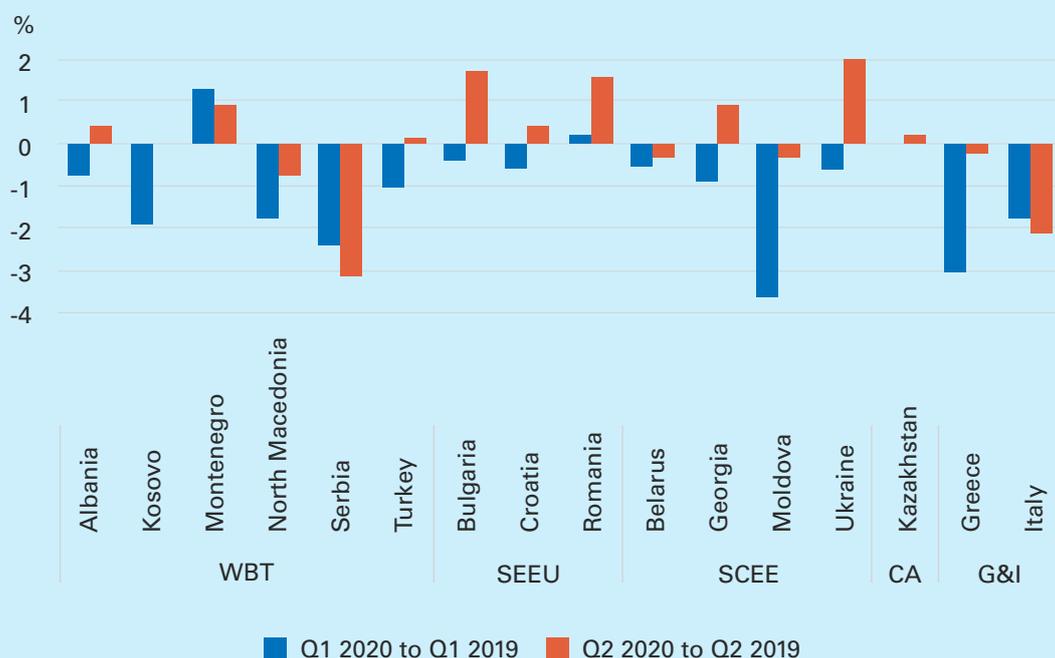
Note: There are no similar data for other countries. Data on vacancies refer to the quarterly number of vacancies (North Macedonia, Bulgaria, Croatia, and Romania); the end-of-month stock of registered vacancies (Bosnia and Herzegovina, Belarus, Moldova, Ukraine); the overall number of registered vacancies during January–March or January–June (Montenegro); requests for job-matching services in vacancy filling by occupations during a month (Serbia); and demand for skilled labour in the electronic labour exchange during a month (Kazakhstan).

A substantial rise in unemployment is expected as an immediate response of the labour market to the declining number of available jobs. In March 2020, ILO estimated that global unemployment could grow by 5.3 million in a low scenario, or by 24.7 million in a high scenario, compared to the rise in global unemployment by 22 million during the global 2008–2009 financial crisis (ILO, 2020a). However, available statistics on the unemployment rate in some ECA countries (Figure 5) shows the opposite trend: the unemployment rate decreased in the first quarter of 2020 compared to the same period in 2019 in most countries, except for Montenegro and Romania, where it increased, and Kazakhstan, where it did not change. One of the explanations for this unexpected trend is that strict containment measures were put in place at the end of the first quarter. Therefore, the pandemic's true impact on the labour market in general and unemployment in particular could be observed only in the second

quarter of 2020 and afterwards. As Figure 5 reveals, the unemployment rate is indeed higher in the second quarter of 2020 than in the second quarter of 2019 in Albania, Bulgaria, Croatia, Georgia, Montenegro, Romania and Ukraine, but not in the other countries of the region.

An alternative explanation for a slow increase or even a decrease in the unemployment rate is that relatively few employed workers in ECA countries were pushed into unemployment. These workers are predominantly those in non-standard employment (informally employed workers, those in temporary contracts, freelancers and own-account workers). Moreover, many workers who relied on jobs for their livelihoods and could not afford to be unemployed had to resume their work as soon as the most stringent workplace closure measures were relaxed, and employment opportunities re-emerged.

Figure 5. Change in unemployment rates in ECA countries (percentage points), Q1/Q2 2020 compared to Q1/Q2 2019



Source: Author's calculations are based on data from Eurostat (Bulgaria, Croatia, Greece, Italy, North Macedonia, Romania, Serbia, Turkey) and national statistical offices (other countries). There are no data for the second quarter 2020 in Kosovo.

*Age limits for the labour force here are: 15–74 years in Belarus, Bulgaria, Croatia, Greece, Italy, North Macedonia, Romania, Serbia, Turkey,; 15–64 years in Kosovo; 15–70 years in Ukraine; and 15 years and over in other countries (Albania, Georgia, Kazakhstan, Moldova, Montenegro).

At the same time, other affected workers were more likely to face a reduction in actual hours worked because formal sector employers in the region often use alternative mechanisms to adjust to temporary demand shocks, namely reduced working hours per day/week, paid regular leave taken during the quarantine instead of summer time, and unpaid or partially paid administrative leave. Remote work is another adjustment mechanism that has been widely used during the COVID-19 pandemic. For example, in Moldova, the number of people who worked from home increased more than 11 times in the second quarter of 2020 compared to the same period in 2019, from 4,700 to 55,600 people. Furthermore, in some

countries (e.g. in Ukraine), employers used wage arrears to avoid mass layoffs in case of economic hardship. Finally, short-term government policies to preserve jobs in otherwise viable businesses, for example, through wage subsidies or temporary unemployment benefits, could help avoid a large job losses.¹⁰ Hence, the labour markets in many ECA countries adjusted to the economic shocks triggered by COVID-19 through underemployment and remote work, rather than through unemployment. Using the ILO classification of major components of working-hour losses,¹¹ this refers to shorter weekly working hours compared to the pre-crisis situation and 'being employed but not working'.

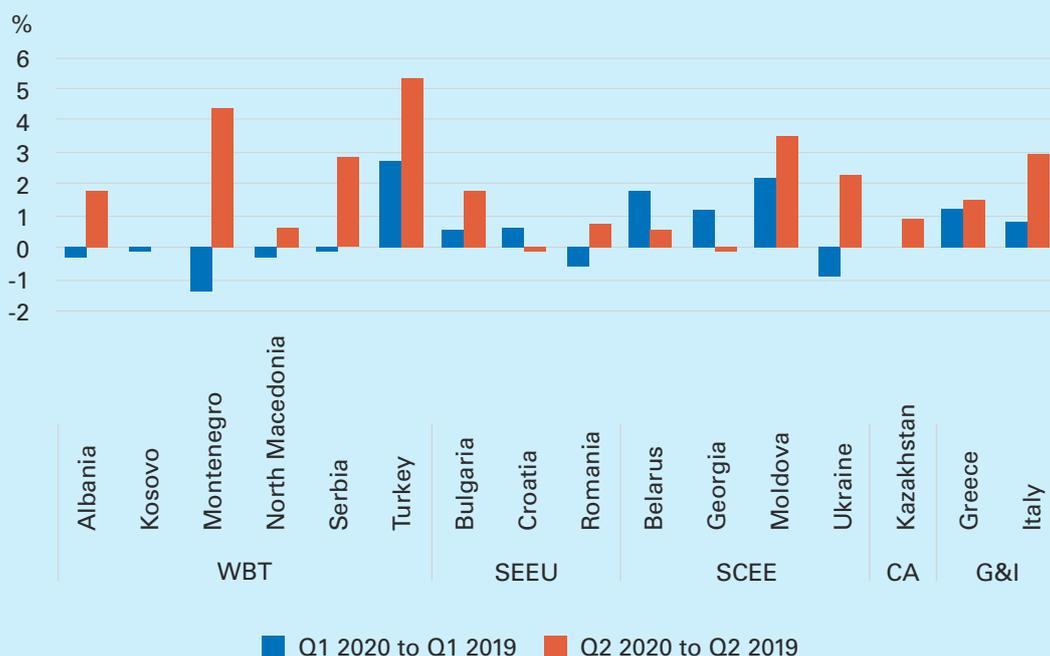
¹⁰ For example, in Ukraine, the partial unemployment benefit measure introduced by the Government is believed to have saved 300,000 jobs (Програма з часткового безробіття зберегла понад 300 тисяч робочих місць — Петрашко, www.epravda.com.ua/news/2020/07/10/662834).

¹¹ The ILO divided working-hour losses into four components: (i) **shorter hours**: a drop in average weekly hours worked compared to the pre-crisis situation; (ii) **being employed but not working**: workers remain in their existing jobs but do not engage in any work (including furloughed workers and workers on sick leave); (iii) **unemployment**: being available for and seeking employment; and (iv) **inactivity**: withdrawal from the labour force (ILO, 2020c).

There is also a large contribution of inactivity to working hour losses, since many individuals prefer to stay outside the labour force waiting for better times after the relaxation of lockdown measures and the recovery of economic activity. The latest data on inactivity rates of the working-age population in ECA countries (Figure 6) confirm that, in many countries in the region, inactivity increased to a greater extent

than unemployment, especially when the rates in the second quarter of 2020 are compared to the second quarter of 2019. Using data from recent labour force surveys in 21 countries in the world, the ILO (2020c) argues that increasing inactivity is a notable feature of the current job crisis and therefore the focus of policymakers on changes in unemployment alone could be misleading.

Figure 6. Change in inactivity rates in ECA countries (percentage points), Q1/Q2 2020 compared to Q1/Q2 2019



Source: Author’s calculations are based on data from Eurostat (North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece, and Italy) and national statistical offices (other countries). There are no data for the second quarter 2020 in Kosovo.
 Note: *Age limits for working-age population are: 15–64 years in Kosovo; 15–74 years in Belarus; 15–70 years in Ukraine; 15 years and over in other countries.

The ILO monitors the labour market impacts of the COVID-19 crisis using its data-driven statistical prediction model ('nowcasting') model. According to the recent monitor in September 2020 (ILO, 2020d), a decline in working hours of 11.6% is expected in the ILO’s ECA region in the third quarter of 2020 compared to the last quarter of 2019 (i.e., 38 million full-time jobs assuming a 48-hour working week); it is up from 4.1% (or 13 million full-time jobs) in the first quarter of 2020, but down from 17.5% in the second quarter (or 55 million full-time jobs) (Table 2). It is estimated that Southern Europe, which includes EU countries that have been hit very hard by the

COVID-19 pandemic, experienced the largest loss in working hours in all three quarters of 2020. In contrast, it is estimated that the smallest loss in the region was experienced in the Eastern Europe sub-region (13.6% in the second quarter and 7.8% in the third quarter), which includes Belarus, Bulgaria, Moldova, Romania and Ukraine. The monitor stresses that, although a smaller decline in working hours is expected in the third quarter of 2020 compared to the second quarter, it is still considerable, “suggesting that full job recovery continues to be hampered by the persisting public health and economic challenges posed by the COVID-19 crisis” (ILO, 2020d: 7).

Table 2. Projected working-hour losses in the ILO ECA countries,* first three quarters of 2020

Sub-region	Percentage of working hours lost (%)			Equivalent number of full-time jobs lost (48 hours/week, in million)		
	Q1 2020	Q2 2020	Q3 2020	Q1 2020	Q2 2020	Q3 2020
Europe and Central Asia	4.1	17.5	11.6	13	55	38
Northern, Southern and Western Europe	4.5	18.1	11.4	7	28	18
Northern Europe	1.1	16.6	10.8	0	6	4
Southern Europe	6.1	23.9	17.1	3	12	8
Western Europe	5.4	14.8	7.7	4	10	5
Eastern Europe	3.1	13.6	7.8	3	15	8
Central and Western Asia	4.8	23.3	18.5	3	14	11

Source: ILO (2020d), Table 1.

Note: *Northern, Western and Southern Europe includes EU countries, as well as Albania, Bosnia and Herzegovina, North Macedonia, Montenegro and Serbia; Eastern Europe includes Belarus, Bulgaria, Moldova, Romania, Ukraine, Czech Republic, Hungary, Poland, Russian Federation and Slovakia; Central and Western Asia includes Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan, Armenia, Azerbaijan, Georgia and Turkey, as well as Cyprus and Israel.

Adjustment mechanisms consisting in reducing working hours, deferred bonus payments and wage arrears help keep workers in their current jobs and therefore help avoid a substantial rise in unemployment. However, the downside of these mechanisms is that they may cause a substantial reduction in total pay for workers. Consequently, working poverty is also likely to increase significantly. Under the middle scenario by the ILO in March 2020 (2020a), there could be nearly 17 million more people in working poverty (earning

less than US\$3.20 purchasing power parity per day) in all lower- and upper-middle countries than before the pre-COVID-19 estimate for 2020. According to the ILO (2020d), labour income, which includes wages for employees and part of income for the self-employed, is estimated to have declined due to working-hour losses during the first three quarters of 2020 compared with the same period in 2019, by 10.6% in the ILO's region of ECA and by 16.3% in the sub-region of Central and Western Asia (Table 3).

Table 3. Projected labour income losses in the ILO ECA countries*, first three quarters of 2020

Sub-region	Labour income loss (US\$ billion, 2019 value)	Labour income loss (% of labour income)	Labour income loss (% of GDP)
Europe and Central Asia	1,205	10.6	6.0
Northern, Southern and Western Europe	955	10.7	6.2
Eastern Europe	105	8.0	3.9
Central and Western Asia	145	16.3	6.7

Source: ILO (2020d), Table A-2.

*See Note to Table 2.



Finally, the COVID-19 crisis is disproportionately affecting certain segments of the population, which can exacerbate social inequalities and labour market polarization:

- **Older segments of the population** are most at risk of developing severe physical health symptoms linked to COVID-19. Also, they can be more likely than prime-age individuals to experience higher unemployment rates, decreased working hours and reduced income (ILO, 2020a). Moreover, as the analysis of individual-level data with the skills measurement modules shows (Hatayama, Viollaz and Winkler, 2020), older workers are less likely to hold jobs that are amenable to working from home in most countries (including Armenia, Georgia, North Macedonia, Serbia and Ukraine from the ECA region), mainly due to an increasing intensity of face-to-face interactions and decreasing information and communications technology (ICT) use at work with age.
- **Women** are more likely to lose jobs and/or income than men because they are over-represented in sectors that are the most affected such as tourism and hospitality, retail trade and personal service activities. Moreover, working mothers bear the increased burden of childcare and unpaid housework brought by the closure of kindergartens, schools and workplaces in the wake of the COVID-19 pandemic (ILO, 2020a).

Higher-skilled women are concentrated in essential public and private sector jobs, such as doctors and nurses, social care workers, teaching professionals, public servants and accountants, and therefore are at a lower risk of permanent layoffs and temporary furloughs. Flexible and distance work arrangements being adopted by many businesses in response to containment measures and erosion of social gender norms in the division of labour in housework and

childcare in dual-earner couples could bring positive changes to female workers (Alon et al., 2020).

The World Bank (2020) estimated that men constitute nearly 90% of workers likely to be the most affected by the COVID-19 impact in Kosovo, and over 60% in the other Western Balkan countries (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia), mainly because more men than women are employed.

- **Informally employed workers and workers with precarious contracts** are likely to be disproportionately hit by the COVID-19 crisis since they are typically the first to be laid off by employers in the case of economic hardship. Own-account workers (including freelancers, casual and gig workers) and unpaid family helpers are also in the risk group due to high income volatility, limited access to unemployment benefits, and no access to paid or sick leave mechanisms (ILO, 2020a). The analysis of amenability of jobs to working from home by Hatayama, Viollaz and Winkler (2020) in countries with Skills towards Employment and Productivity (STEP) data (including Armenia, Georgia, North Macedonia, Serbia, and Ukraine from the ECA region) supports this statement. Indeed, informally employed and self-employed workers are less likely than formally employed workers and salaried workers to have jobs that are amenable to working from home, because the former's jobs tend to require greater physical and manual intensity, face-to-face interaction and lower ICT use.¹²

The analysis of labour force data in Western Balkans reveals that of all workers most likely to be affected, around 23% are self-employed and around 75% are employees working predominantly in small private companies with up to ten employees (World Bank, 2020).

¹² Although the self-employed are more likely to use ICT at work than salaried workers, this factor does not significantly affect their working-from-home measure (Hatayama, Viollaz and Winkler, 2020).

- **Low-educated and low-skilled workers** are at a high risk of reduced hours and pay, temporary furloughs and permanent layoffs since they are over-represented in the sectors most affected by the economic downturn (wholesale and retail trade, accommodation and food, land transport and storage, etc.) (See the analysis by McKinsey & Company (2020a) for European countries.) This is in line with lower amenability to working from home for individuals without college education observed in countries with STEP data (including Armenia, Georgia, Macedonia, North Serbia and Ukraine from the ECA region) (Hatayama, Viollaz and Winkler, 2020).
- **Migrant workers** who returned home before the border closures, and **seasonal migrant workers** are vulnerable to the impact of the COVID-19 crisis because they face particular difficulties in reaching their places of work in destination countries due to travel restrictions (ILO, 2020a). In addition, many of them are not covered by the unemployment insurance system and active labour market policies in their countries of origin since they have not contributed to the system. Limited opportunities to obtain seasonal work in advanced countries and lack of income support at home may encourage former migrants from the ECA region to migrate from their regular destinations (advanced economies) to other countries that allow the entry of foreign workers. Migrant workers who stayed abroad are more likely to lose their jobs and/or income, especially if they work informally

or with precarious contracts, and in sectors or activities affected by COVID-19 (in particular, hotels, restaurants, retail trade, housekeeping, care for the elderly, etc.). Due to the consequent drop in remittances, the disposable income of households dependent on migrants' income is negatively affected, which in turn is likely to encourage some previously inactive household members to search for jobs. Thus, the local unemployment rate in the countries of origin in ECA may further increase.

- **Young people** are generally more exposed to socio-economic shocks since most are transitioning from school to their first work experiences and are highly reliant on parents' support and public services to receive guidance and orientation in the labour market. Current disruptions in education and training systems may also take a toll on future graduates, reflected in various types of skills gaps and insufficient preparedness for the world of work or further studies. The next chapter examines youth-specific challenges and opportunities in the context of the pandemic and future recovery.

The magnitude of the total effect of the COVID-19 crisis on the labour market and disadvantaged population groups in ECA countries will depend on how the pandemic evolves and on the effectiveness of the policy measures aimed at preserving jobs in otherwise viable businesses, boosting labour demand in new activities, and supporting hard-hit businesses and people.



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2 THE SOCIO-ECONOMIC IMPACT OF COVID-19 ON YOUTH IN EUROPE AND CENTRAL ASIA

2.1. AN ECONOMIC AND LABOUR MARKET PERSPECTIVE: A HIGH-RISK ENVIRONMENT FOR YOUTH EMPLOYMENT

While younger generations are experiencing lower risks of developing severe physical health symptoms than older age cohorts, the COVID-19 crisis poses substantial risks to their lives, both in the short and long term. For example, the pandemic is likely to exacerbate labour market challenges in the region. Even prior to the COVID-19 outbreak, young people living in the ECA region experienced double or triple rates of unemployment compared to adults, and worse quality of jobs compared to other age groups (Kupets, 2020).

Difficulties in finding or maintaining a job, human capital depreciation and loss of professional networks during prolonged out-of-work periods can have long-term scarring effects, leading to the emergence of a generation excluded from the (primary) labour market (ILO, 2020b; OECD, 2020d) and more likely to fall into poverty. In addition, as illustrated by previous economic shocks such as the global 2008–2009 financial crisis, young people graduating in times of crisis will find it more difficult to find decent jobs and income, which is likely to delay their path to financial independence (OECD, 2020d).

Young people's perspective on the future

Youth from ECA expressed a wide range of feelings about their future (Figure 7). On the one hand, half of the respondents from eight countries in the region reported negative feelings such as being confused, scared, pessimistic or angry; on the other hand, 25% of youth are still optimistic despite COVID's impact on their lives and expressed a positive outlook on the future. Some of the participants of the in-depth consultations described the pandemic as an eye-opening situation and are looking forward to new business opportunities in the recovery process, with a focus on sustainable development and on the green economy.

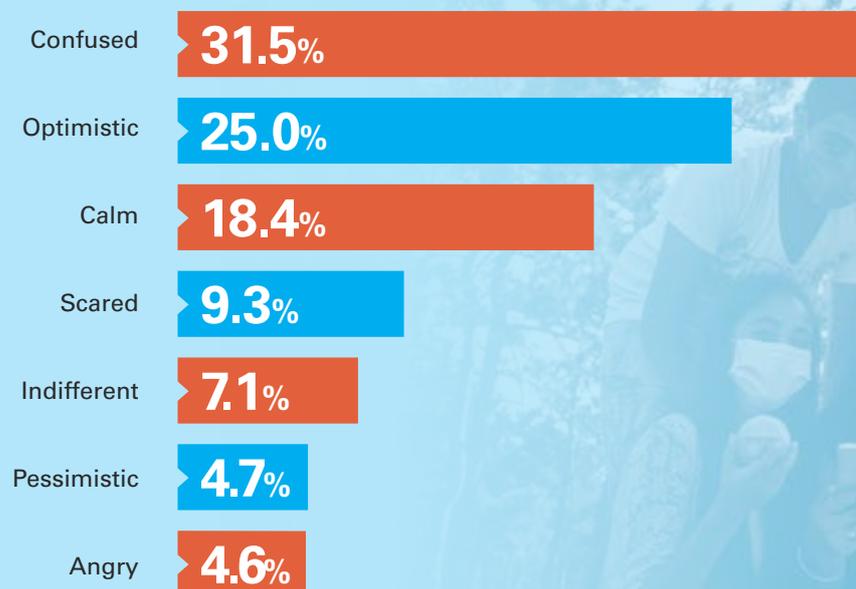
When asked about the influence of the pandemic on their views about the future, youth in the ECA region are divided. On the one hand, 35.8% of youth from eight countries¹³ stated that COVID-19 had changed their perceptions of the future for the worse. On the other hand, 38.9% of youth stated that their perception of the future had not changed even with COVID-19 (Figure 8).

 **We don't know what the future holds... I don't see how the economy can get better after this without some real changes.**
(Todor, 19, Serbia)

¹³ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

Figure 7. Youth's feelings about their future after COVID-19

Q | When you think about your future after COVID-19, how do you feel? (% of respondents)

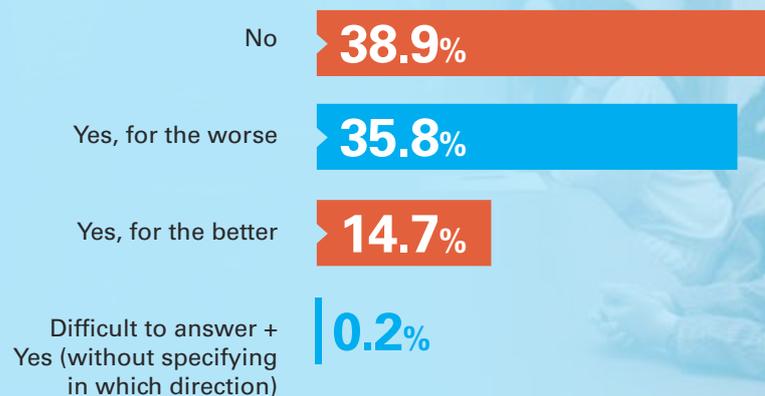


Source: U-Report polls, June–July 2020.
Note: Number of respondents is 9,640.

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Figure 8. Did COVID-19 influence your view of the future?

Q | Did COVID-19 influence your view of the future? (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 9,585.

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We, as young people, have to take advantage of all the opportunities we have to become richer, not only from an economic and financial point of view, but mostly in terms of the experiences we will gain.
(Erjon, 17, Albania)

The main areas of concern for youth are health (36.7%), their financial situation/the financial situation of their family (24.6%), and the inability to travel/move freely (21.9%) and study (13%).

In the long term, most youth in the ECA region believe that they will have a better life than their parents, mainly due to technological progress, increased access to knowledge and learning opportunities, and their willingness to take risks. Youth perspectives about quality of life went well beyond the economic aspect. Their views of a better future for young generations are mostly linked to more exposure to information about the world, a wider variety of opportunities, experiences, skills and attitudes than those of their parents. The fact that they live in a more peaceful era than their parents makes them strongly believe that they are more likely to succeed in their lives.

Youth's perceptions about the post-COVID-19 economy

Youth's perceptions about the post-COVID-19 economy of their countries are generally negative, and pessimism tends to prevail. Participants of the in-depth consultations associated the post-COVID-19 economic scenario with negative words such as crisis, chaos, challenge(s), problem(s), closure, limits, loss, awful, terrible, ruined, fragile, sad, or confusion (Figure 9). They mainly expressed uncertainty about the future of the economy, fearing a negative impact of current decisions on their career perspectives, given the pre-pandemic high unemployment rates.

Figure 9. Youth's perceptions about the economic situation in the post-COVID-19 period

Q | Can you tell us one word that comes to your mind when you think about the economy of your country after COVID-19?



Source: UNICEF's in-depth consultations with youth aged 15-24, July 2020.

2.2. THE IMMEDIATE IMPACT ON YOUTH EMPLOYMENT, UNEMPLOYMENT, DISPOSABLE INCOME AND PRODUCTIVITY

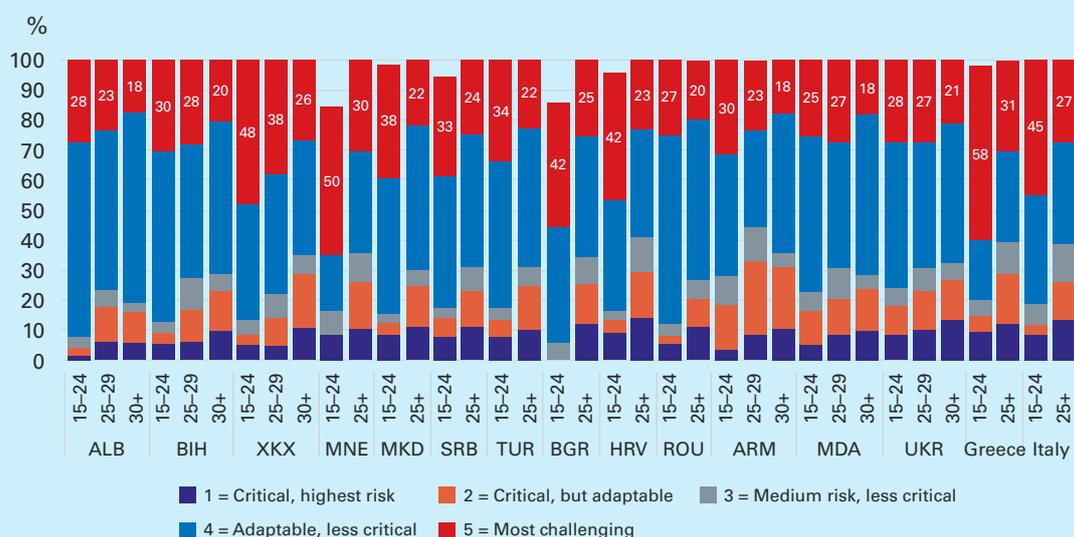
When employed, young people are at higher risk than adults of income and job losses because they are often employed in activities and types of businesses (private sector, SMEs) that are likely to be the most affected by the current crisis. Furthermore, since young workers often hold part-time, temporary and informal jobs, they are among the first to be let go in times of economic crisis. To support this hypothesis, the author applied the same approach described in Chapter 1 for total employment by aggregating sectors into five clusters (Table 1) and using statistics on employment by sector and age group derived from Eurostat, or available individual-level Labour Force Survey (LFS) data.

As Figure 10 shows, in all countries except in Moldova, the share of young people (15–24 years) engaged in the ‘most challenging’ activities (cluster 5) is larger than that of adult workers (aged 25 years and over). Therefore, young workers are much more likely than adults to have jobs at risk, i.e. with reduced hours and pay, temporary furloughs and permanent layoffs. However, young workers account for less than 14% of the total number of jobs in cluster 5 in ECA countries, as shown in Figure 10, because of their small share in the total workforce.

Rise in youth unemployment

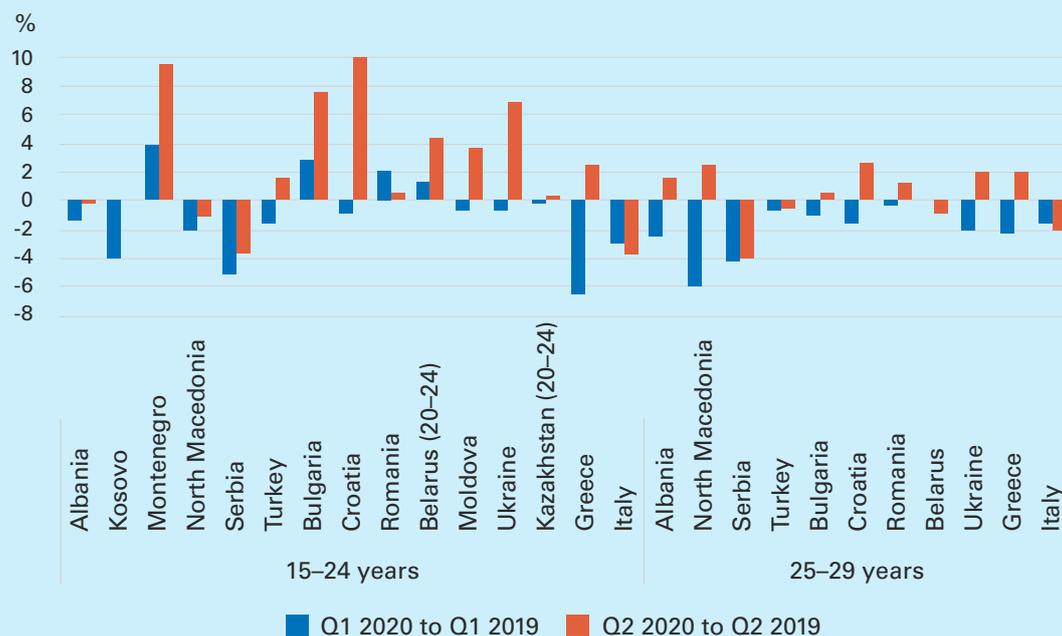
Since young people are usually more vulnerable to economic shocks than prime-age and older workers, youth unemployment is expected to rise at a faster and greater rate during the COVID-19 crisis (ILO, 2020b). In the second quarter of 2020, the unemployment rate of 15–24-year-olds increased compared to the same period in 2019 in most ECA countries where quarterly data on unemployment across age groups are available (Figure 11). The rise in youth unemployment was especially high in Croatia, Montenegro and Bulgaria compared to other countries. A comparison of quarter-to-quarter changes in the unemployment rates of youth (Figure 11) and total labour force rates (Figure 5) reveals a much larger increase in youth unemployment and fewer cases of its decrease in the second quarter of 2020 compared to the total working-age population. This suggests that youth have experienced great difficulties in finding and/or keeping a job during the COVID-19 crisis.

Figure 10. Composition of employment by clusters and age groups in selected ECA countries (%), latest year available



Source: Author's estimations are based on: secondary data from Eurostat (Montenegro, North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece and Italy; average of quarterly data in 2019); and primary data from the individual-level Labour Force Survey (LFS) datasets (Albania, 2016, Bosnia and Herzegovina, 2016, Kosovo, 2017, Armenia, 2018, Moldova, 2016; and Ukraine, 2013).
Note: Definitions of clusters are provided in Table 1. The sum of the share of youth employment is less than 100% in some countries, because in some sectors, employment is not reported by Eurostat, likely due to low statistical reliability.

Figure 11. Change in youth unemployment rates in ECA countries (percentage points), Q1/Q2 2020 compared to Q1/Q2 2019



Source: Author's calculations are based on data from Eurostat (North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece and Italy) and national statistical offices (other countries). There are no data for the second quarter (Q2) 2020 in Kosovo.

Increase in youth inactivity

Young people could be also discouraged from participation in the labour force in response to worsening labour market prospects. Available statistics from labour force surveys show that the economic downturn and decline in employment opportunities in the second quarter of 2020 have led not only to a higher youth unemployment (Figure 11), but also to a substantial increase in youth inactivity in all ECA countries except in Croatia and Belarus (Figure 12). If young people are inactive for reasons other than education and training, and stay outside the labour force for a long period, there is a high risk of long-term labour market disadvantages in the future.

Increased rates of youth not in education, employment or training (NEET)

In this scenario, the share of young people who are not employed and NEET is a better indicator to measure youth joblessness, discouragement, marginalization and exclusion. At the time of drafting this report, signs of increasing NEET rates could be observed in Bulgaria, Romania and Turkey

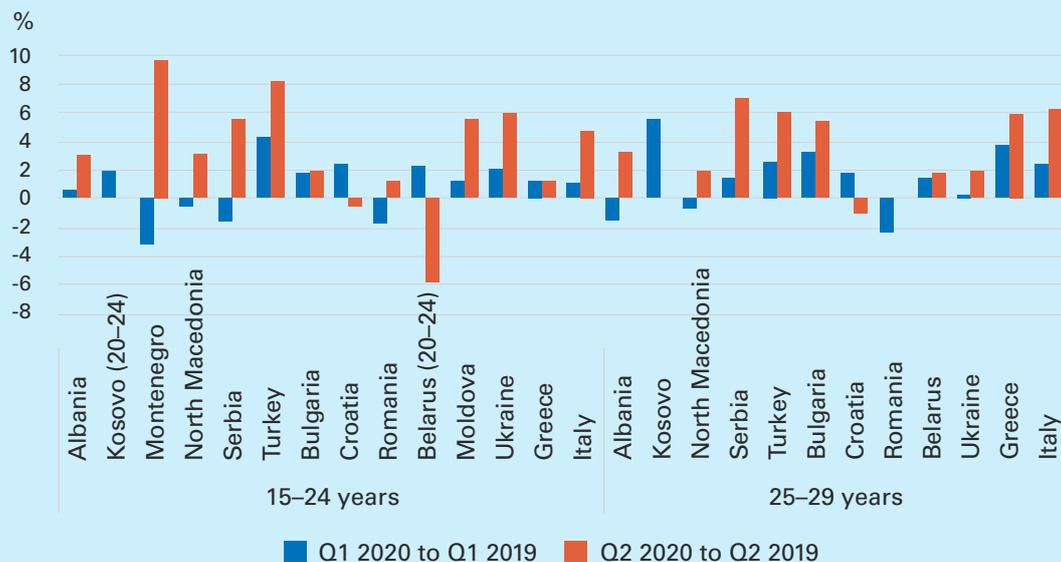
(Annex Figure A-2), but no recent quarterly data are yet available in many ECA countries.

Earlier studies of NEETs in ECA countries (e.g. ETF, 2015; Elder, 2015) find that the NEET population consists in young people with a wide variety of needs and reasons for joblessness and exclusion. Usually, the main reason for joblessness among men is simply that they cannot find a job, whereas young women are more likely not to work because they need to take care of their household, children and relatives. There is also evidence that young people from the poorest households, ethnic minorities and people with disabilities are more likely to become NEETs (ETF, 2015). Unskilled young people are also highly vulnerable to joblessness and exclusion, particularly in times of economic crisis.

Findings from U-Report surveys confirm a worrying picture with regard to the immediate impact of the crisis on youth employment. Among young workers from eight countries,¹⁴ 15.4% reported that they had stopped working during the crisis, 10.9% had their working hours reduced, 15.3% had their salary reduced, and 5.2% lost their job. On the positive side, 42% reported that their working situation was not affected by the COVID-19 crisis (Figure 13), and 11.8% found a new job during the pandemic.

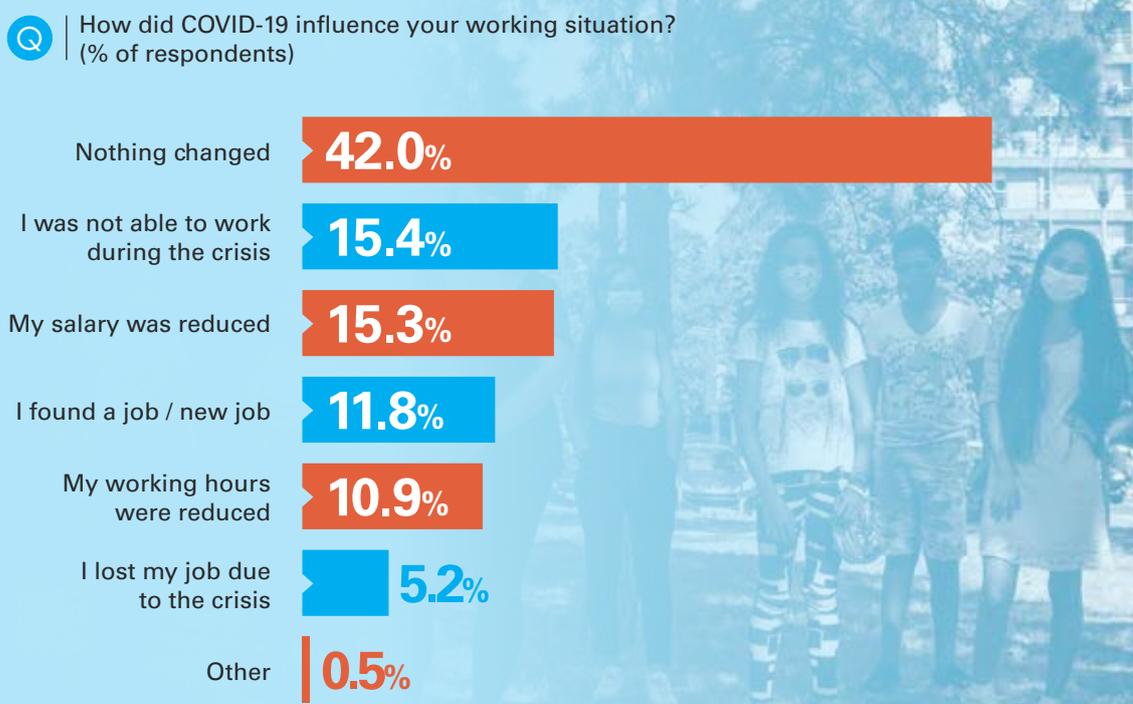
¹⁴ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

Figure 12. Change in youth inactivity rates in ECA countries (percentage points), Q1/Q2 2020 compared to Q1/Q2 2019



Source: Author’s calculations are based on data on youth labour force participation rates from Eurostat (North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece and Italy) and national statistical offices (other countries).
 Note: There are no data for Q2 2020 in Kosovo.

Figure 13. COVID-19’s impact on the working situation of youth



Source: U-Report polls, June–July 2020.
 Note: Number of respondents is 2,355.

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Decreased productivity and income loss

Fifty-two per cent of respondents from the same countries reported a decline in self-assessed work-related productivity, and 45.2% reported income losses (Figure 14). Data reveal that those aged 15–19 were more likely to stop working or lose their job, which could be linked to the type of work they do (more ad hoc and temporary compared to the older age group).

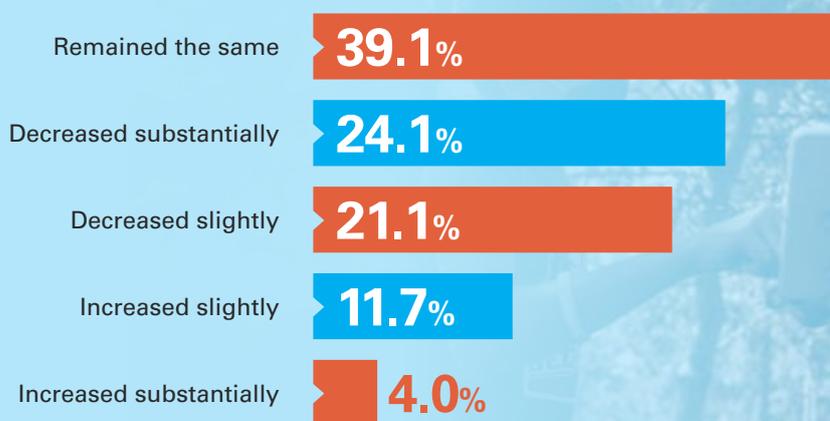
Similarly, more than half of the respondents from a survey conducted by the United Nations in June among 700 urban and rural youth in Kyrgyzstan (aged 15–29) stated that their income decreased after the COVID-19 outbreak (Kyzy, Nurgalieva and Kazakbaeva, 2020). The assessment of the income level by gender does not show a significant difference, with slightly more boys reporting a significant decrease in income (20.2% of boys vs. 16.3% of girls). One quarter of

Last year I was helping a relative; we were selling pancakes in the city. This year I am helping her too, but last year's sales were much bigger than this year.
(Vaska, 17, North Macedonia)

young people whose income decreased had no plans to recover their earnings. The most popular plan to recover income was to look for part-time work in addition to their main job (20.1%) or try to start their own business (17.6%). Only 18% of young people were planning to look for a job (formal and informal); 4.5% planned to migrate, and less than 2% planned to contact the Ministry of Labour and Social Development services.

Figure 14. Share of youth reporting a change in income since the onset of the pandemic

 Since the start of the COVID-19 outbreak, how has your income changed?
My income has... (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 2,233.

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2.3. EMERGING JOB OPPORTUNITIES, BUT RISKS OF PRECARIOUS EMPLOYMENT AND INSUFFICIENT SOCIAL PROTECTION

While 60% of young people aged 15–24 are optimistic about finding a job in their preferred area of work, 34.5% of all surveyed participants in eight countries¹⁵ were concerned about being able to only find a low-quality job (Figure 15), 20% were afraid of not finding a job, and 14.9% of not having the skills to find a good job. Overall, females seem to be more concerned than males.

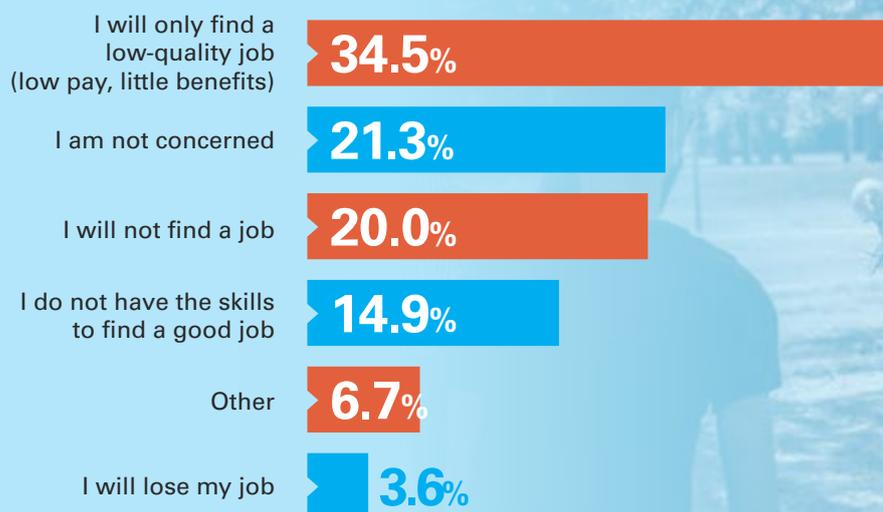
Emerging job opportunities

Young people who are not looking for standard employment (full-time, formal, with social protection benefits) are likely to benefit from the emerging job opportunities triggered by the adoption of businesses to remote working modalities that have been used during the pandemic. These opportunities include low- to mid-skilled jobs in online trade, warehouse, transport and delivery, as well as highly skilled jobs in IT, marketing, accounting, written translation, mentoring and other professional activities that can be carried out remotely (online/platform work).¹⁶

We have a new wave of coronavirus and we do not know how it's going to end. It would be much better to be self-employed. The best jobs would be online such as programming. And businesses like Netflix are skyrocketing now; even small e-commerce businesses are blooming. We should take advantage of this now.
(Aleksej, 14, Croatia)

Figure 15. Perceptions about career prospects in the COVID-19 context

When you think about your career prospects, what is your biggest concern?
I am afraid that... (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 7,216.

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¹⁵ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

¹⁶ IT Ukraine Association (2020b).

Prior to the COVID-19 crisis, the growth of the online (i.e. gig or platform) economy provided job and income opportunities, especially for youth. It also posed challenges since not all gig workers could enjoy job security and basic fringe benefits that are typical in an employment relationship (Aleksynska, Bastrakova and Kharchenko, 2018). According to a recent study of platform jobs in Serbia, the number of platform workers dropped only marginally during the COVID-19 pandemic, but their working hours decreased substantially in March–April compared to January–February 2020, especially for female workers, and the average income fell by over 40% (Gigmetar, 2020).

The COVID-19 crisis has increased the demand for gig workers, in particular those involved in delivery. For workers engaged in these kinds of jobs during the COVID-19 crisis, concerns included increased risk of infection due to limited access to the necessary protective equipment and measures to ensure social distancing, as well as contractual issues, such as a lack basic social protection including paid sick leave.

Entrepreneurship opportunities

Results of the in-depth consultations reveal that, despite the overall negative perception of the economy of their countries during the pandemic, many young people also see the crisis as an opportunity to start a new business. They also see plenty of opportunities to get jobs in specific

sectors, such as the IT sector (e.g. programming), e-commerce, online education, financial industry and medical care services (e.g. doctors, nurses, psychological support online).

Two thirds of respondents from seven countries¹⁷ reported that they had considered starting their own business and becoming entrepreneurs, provided that they had enough governmental support and an appropriate business environment; males seem more inclined to entrepreneurship than females.

Among the biggest obstacles to starting a business, 42.7% of young people cited the lack of financial support (loans, grants, investors), followed by lack of information on how to start a business (21.9%), lack of entrepreneurship skills (17.2%), and fear of failure (14.7%) (Figure 16).

People are pretty reluctant. They are scared of going out and trying new things, which is not that good for entrepreneurs. Also, there are so many obstacles to entrepreneurship: paperwork, legislation... (Tamara, 22, Moldova)

Figure 16. Main obstacles to becoming an entrepreneur

Q | In your opinion, what are the biggest obstacles for a young person to become an entrepreneur? Young people... (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 6,712.

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¹⁷ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Romania, Ukraine and Uzbekistan.

Increased opportunities to gain practical work skills through internships and apprenticeship, financial support for entrepreneurship and career guidance

were identified as key measures to support young people in their journey to employment (Figure 17).

Figure 17. Key measures to support young people looking for employment

Q | What is the best way to support young people who are looking for a job? (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 6,986.

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2.4. EMERGING NEEDS AND RESPONSES IN EDUCATION AND SCHOOL-TO-WORK TRANSITION

Interrupted education and an abrupt shift to distance learning: The largest educational experiment

In an attempt to contain the spread of the COVID-19 pandemic, most governments in the ECA region temporarily closed educational institutions. The closure of schools and universities between March and June 2020 affected millions of learners at all levels of education in most countries of the region. According to the United Nations Educational, Scientific and Cultural Organization's (UNESCO) global monitoring of school closures, due to COVID-19,¹⁸ as of late March 2020 and during April 2020, 19¹⁹ out of 22 countries²⁰ in the ECA region had suspended classes at all levels of education, affecting approximately 45.5 million students at secondary

and tertiary levels. In September 2020, schools and universities reopened fully or partially in all countries except in North Macedonia. As of 12 October 2020, schools and universities in Azerbaijan, Bosnia and Herzegovina, Kazakhstan, Serbia and Romania re-opened partially, in various ways: (i) a partial re-opening in certain areas (e.g. region, municipality or individual schools); (ii) a phased re-opening by grade level or age; and/or (iii) the use of a hybrid approach combining in-person and distance learning.

In all countries, issues related to ensuring a safe return to school represented another set of challenges that needed to be addressed amidst a range of often competing policy advice, and health safety considerations as well as a range of often heated controversies that these issues generated among parents, students and the wider public.

¹⁸ UNESCO (n.d.).

¹⁹ Excluding Belarus, Tajikistan and Uzbekistan.

²⁰ Data for Kosovo are not available.



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In most countries, distance learning was launched one, two or three weeks after the lockdown. Overall, all countries in the region made a tremendous effort to ensure the continuity of learning for all students, pursuing a variety of approaches, platforms and tools to mitigate school closures, and rapidly shifting to remote learning programmes, digital learning tools and capacity building of trainers in their use.

Broadcasting services, particularly television, have been key channels for distance learning. Participation in digital distance learning (DDL) increased exponentially in many forms during the pandemic, through virtual classrooms, learning platforms, social media, on-line repositories, on-line assessment, webinars and recorded video lessons (ETF, 2020b).

In most countries, ministries played a key role in coordinating donors and mobilizing television stations, Telecom and ICT companies to accelerate the provision of digital distance learning (DDL) and reduce the digital divide for disadvantaged groups and remote areas. In countries such as Turkey, Azerbaijan and Armenia, governments quickly authorized additional spending on education.

Given the typical pace of change in education in the region, the rapidity of decision-making and implementation during the first wave of the pandemic has been impressive. Nevertheless, despite all efforts, the COVID-19 crisis revealed that most education systems in the ECA region were unprepared for the shift to digital learning, and the pandemic exacerbated education and social inequities

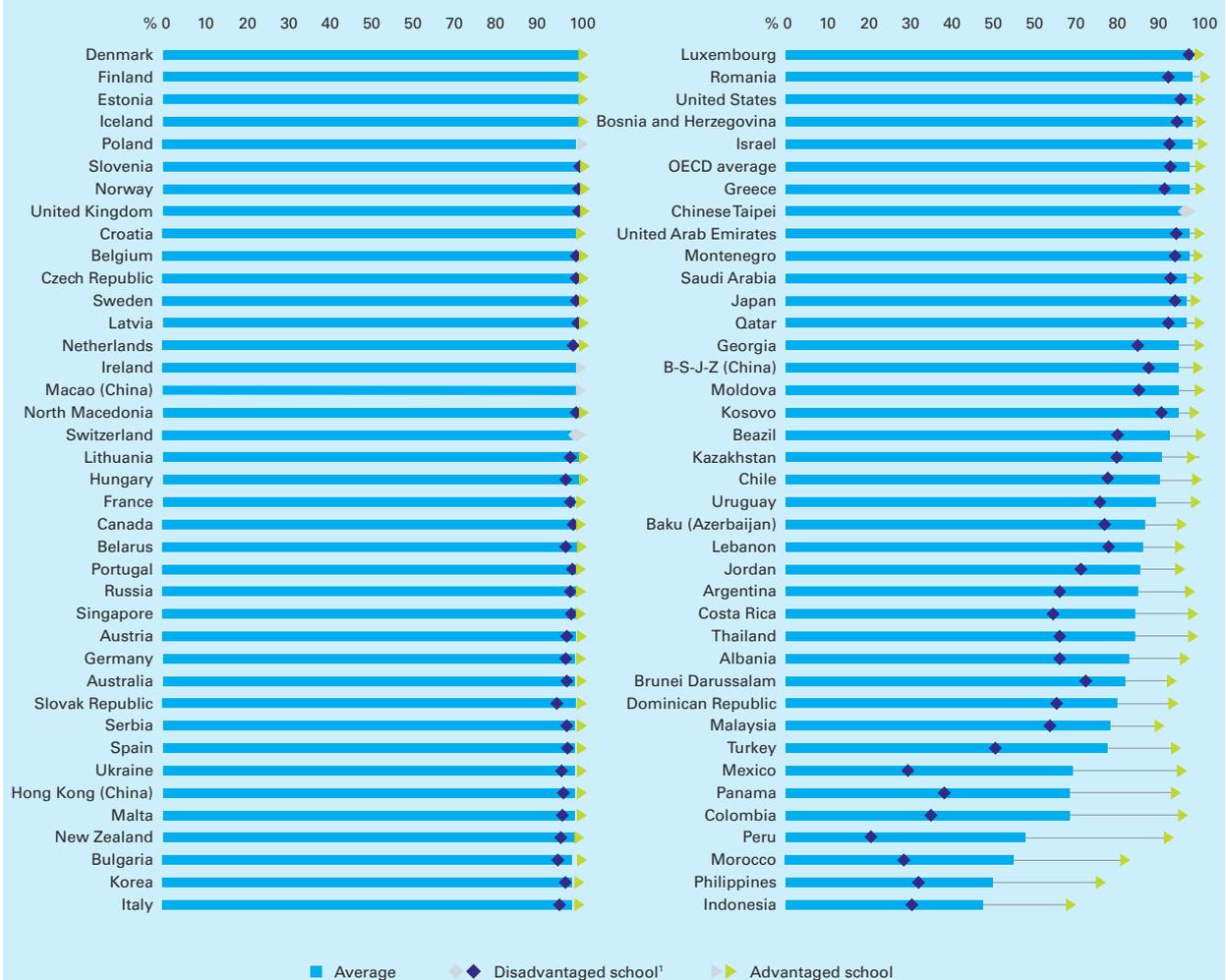
in the region. Issues of adequacy, preparedness, quality, access and inequities emerged everywhere. For the vast majority of countries, this was an abrupt change to a new reality requiring students, teachers, parents and caregivers to adjust rapidly. For some children, adolescents and youth – in particular, those from disadvantaged communities with limited access to technologies, or those with disabilities, chronic health conditions, learning in minority languages or those with other needs – distant learning brought additional challenges.

Internet connectivity

In crises such as the current pandemic, Internet connectivity is an important tool for achieving learning outcomes and promoting skills development, and its role in guaranteeing the continuity of learning has become essential. In all ECA countries, there have been segments of the population for whom access to the internet and to technological devices has been a big challenge. The impact of gaps in Internet access on furthering divides and contributing to deepened inequity has also become more evident. These divides can be geographical (urban vs. rural), and/or based on income (high vs. low socio-economic status), age and gender (UNICEF, 2020), as well as based on abilities and special needs.

The Programme for International Student Assessment (PISA) 2018 results (Figure 18) reveal that Turkey and Albania are outliers in the ECA region, with over 20% and around 10%, respectively, of students not having access to the Internet (OECD, 2020e).

Figure 18. Percentage of students who have access to the Internet, by type of school (PISA 2018 results)



Source: OECD (2020e), Figure 3.

U-Report data provide an encouraging picture in terms of students’ access to connectivity during school closure in eight countries²¹ of the ECA region (Figure 19). The polls revealed that 96.3% of surveyed students had Internet access at home during school closure.

It should be noted, however, that the U-Report only captures the voices of youth who have access to the Internet; hence, surveyed participants might not represent the most vulnerable youth in those countries.

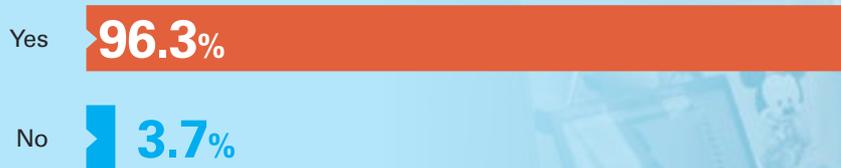
ETF’s mapping of responses to digital learning in the region confirm that, despite efforts by all countries to increase opportunities to provide access and connectivity to all students, inequalities in access to infrastructure and the cost of connectivity prevent the efficient roll-out of distance and online learning solutions during the pandemic. This particularly affects

young people from the most vulnerable backgrounds, including those living with a disability and those in rural areas (ETF, 2020b).

Some don’t have resources or Internet, and live in regions far from school. We need to ensure that they have a simple way to access education — a bus, a car, Internet, or a group of teachers who can reach them and teach them. (Davit, 15, Armenia)

Figure 19. Internet access at home during school closure

Q | Did you have Internet access at home during the COVID-19 crisis and lockdown? (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 5,015.

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Access to learning devices

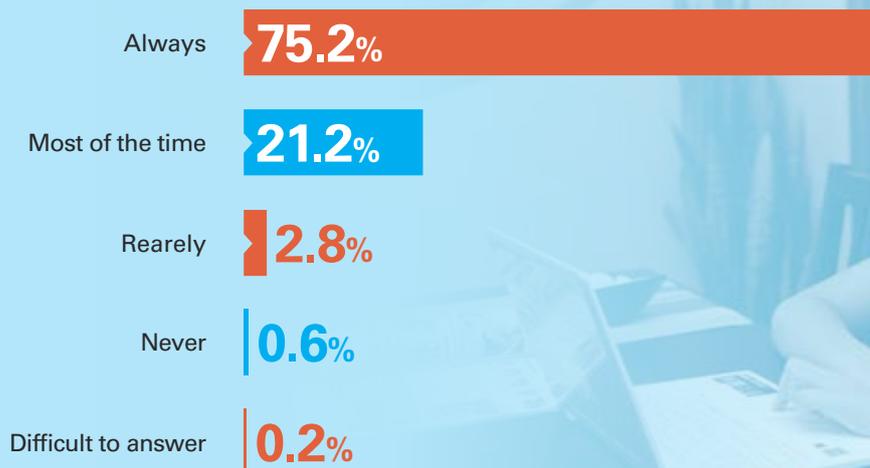
Access to learning devices such as a computer or a laptop is fundamental to successful online learning. U-Report data show that 75.2% of surveyed youth from seven countries²² always had access to a computer/smartphone/tablet, while 21.2% had access most of the time (Figure 20).

Nevertheless, the PISA 2018 results reveal a much less rosy picture, particularly for the most socio-

economically disadvantaged adolescents. Prior to the pandemic, data revealed that, in Turkey, over 30% of all students and 60% of students of socio-economically disadvantaged schools did not have a computer to study at home (Annex Figure A-3); in Albania, the respective shares were slightly lower than in Turkey; and even in relatively better off Belarus, roughly one in seven students from disadvantaged schools did not have a computer for schoolwork (OECD, 2020e).

Figure 20. Access to learning devices during school closure

Q | Did you have access to a computer/smartphone/tablet to study during the COVID-19 crisis & lockdown? (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 5,205.

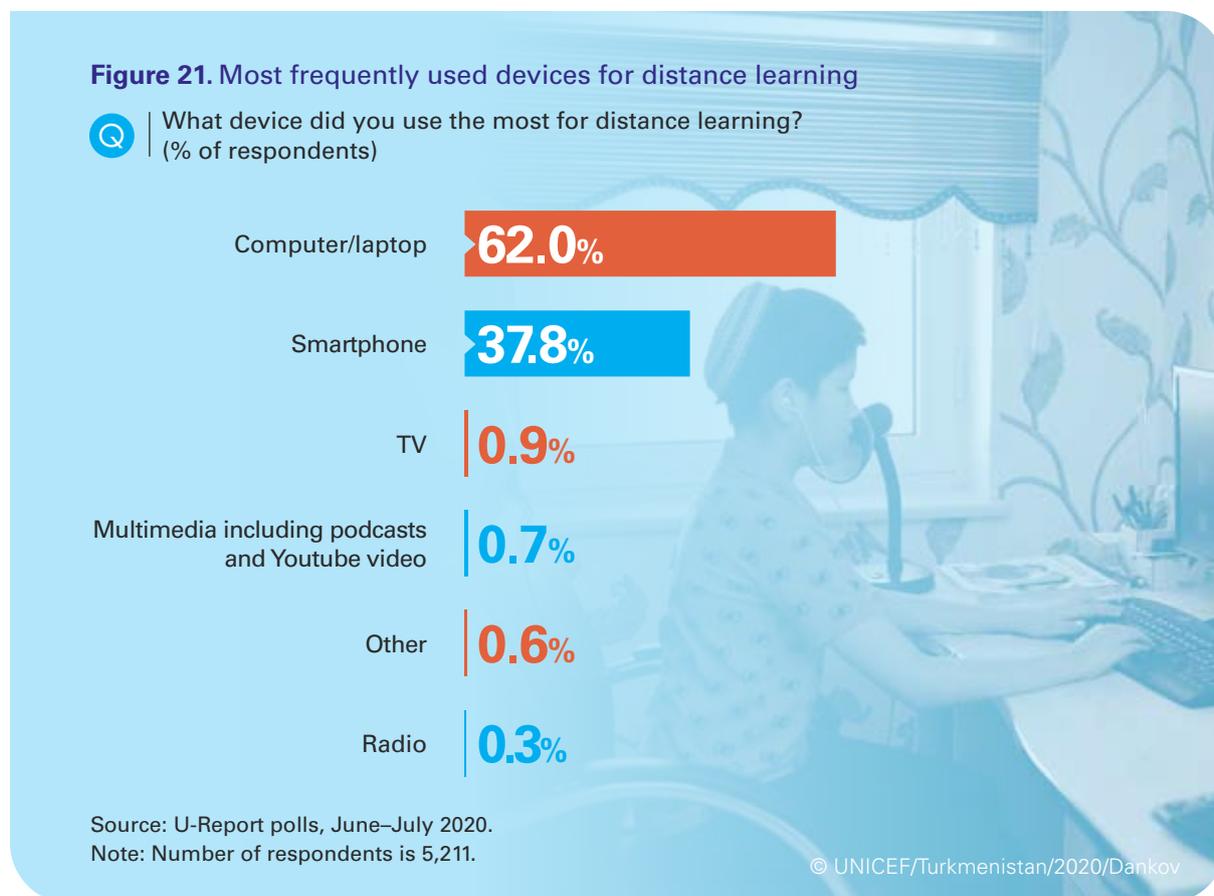
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²¹ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

²² Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania and Ukraine.

When asked about the devices used for distance learning, 62% of U-Reporters reported that they used a computer and/or laptop, while 37.8% used a smartphone (Figure 21). Television, which was used

by less than 1% of the surveyed participants, was often described by youth as a much less interesting and engaging way of learning, particularly due to the lack of interaction with other students.



The learning space: Access to a quiet place to study

The design and management of learning spaces are fundamental to the achievement of positive learning outcomes as well as to the health and well-being of learners. Simply put, good learning environments foster quality learning, while bad learning environments do not (UNESCO, 2012).

According to PISA 2018 survey results (OECD, 2020e), in Bulgaria, almost 20% of 15-year-old students did not have a quiet place to study at home; among students from the most disadvantaged backgrounds, this percentage was even higher. In Croatia, Georgia and Montenegro and Turkey, over 10% of students did not have a place to study at home. In contrast, in Belarus and Ukraine, nearly all students had a quiet space to study in their homes.

More than three quarters (75.1%) of U-Reporters from seven countries²³ revealed that they had their

own private place to study, always or most of the time (Figure 22).

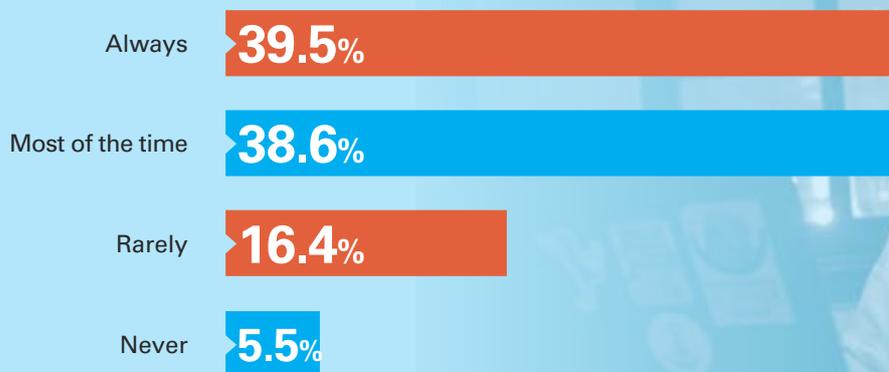
The learning loss

Prior to the outbreak of COVID-19, many countries in the region were already struggling with a learning crisis. Results of the PISA 2018 assessment of 15-year-olds show a relatively low educational achievement of adolescents in 16 participating ECA countries compared to the OECD averages across all subjects (Figure 23). In addition, there are significant differences across countries belonging to ECA region as a whole and across sub-regions. For example, in Kosovo, over 75% of surveyed 15-year-olds were low achievers in reading, mathematics and science, and the mean scores in all three subjects were among the lowest among 79 PISA-participating countries and economies, and far below the OECD average. There was a remarkably large share of low-achieving students in these three subjects (about 50% or above) in Azerbaijan, Bosnia and Herzegovina, Georgia, Kazakhstan and North Macedonia.

²³ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania and Ukraine.

Figure 22. Access to a quiet place to study during lockdown

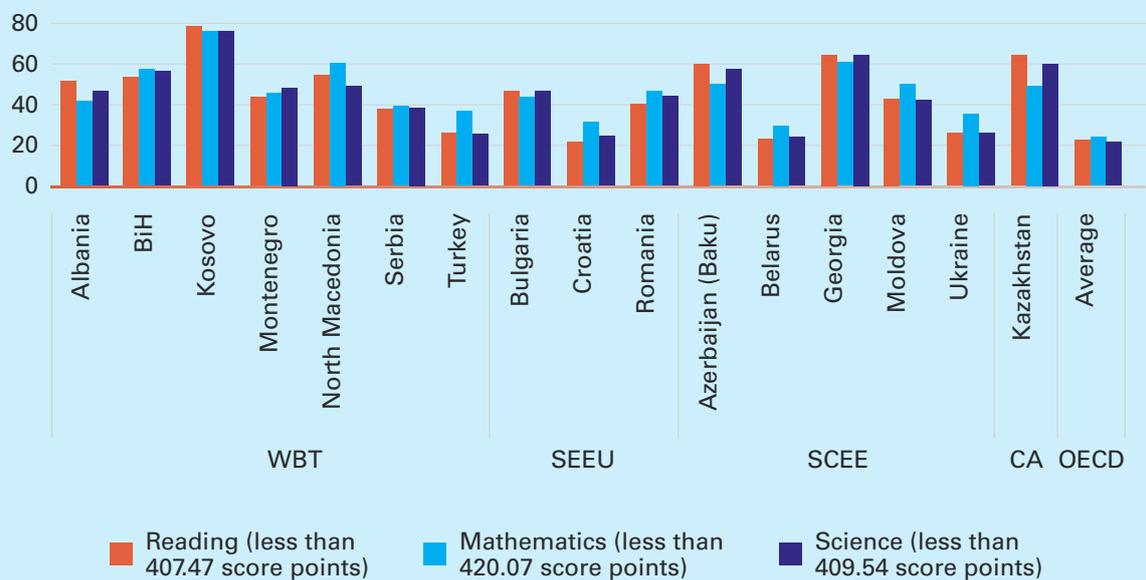
Did you have your own private/silent space to study during the COVID-19 crisis and lockdown? (% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 5,175.

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Figure 23. Share of low achievers (below Level 2) according to PISA 2018 (% of surveyed 15-year-olds), by subject

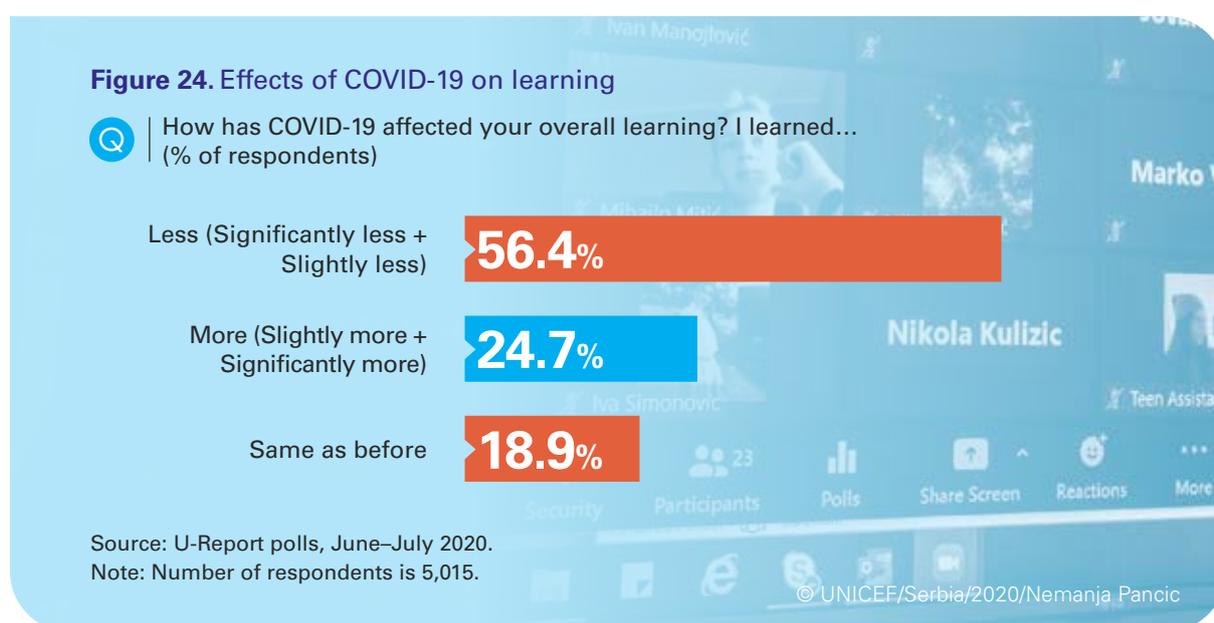


In contrast, the share of low-achieving students in Belarus, Croatia, Turkey and Ukraine is only slightly above the OECD average. In addition, the share of top-performing students is fairly small in all ECA countries compared to the OECD average, especially in science. On average, 15-year-old students in Belarus outperformed their peers in 15 other ECA countries participating in PISA 2018, but their performance is still below the OECD average in all three subjects. PISA reading scores indicate that children in the ECA region are generally able to read but often lack functional literacy, i.e. the ability to access, store and utilize information from reading.

Several studies are underway to assess the learning loss of students during the pandemic. OECD estimates show that a lost school year can be

considered equivalent to a loss of between 7% and 10% of lifetime income (OECD, 2020d). The loss of learning during school closures varies significantly by a number of factors, including access to remote learning, the quality of remote instruction, home support and the degree of students' engagement. While it is currently impossible to estimate the exact impact of the crisis on learning outcomes, U-Report data highlight a worrisome situation for some countries in the ECA region.

Despite governmental efforts to continue educational provision through distance learning or by moving in-person classes online, 56.4% of surveyed participants from seven countries²⁴ reported that they had learned less during the pandemic (Figure 24).



A survey conducted by UNICEF in Serbia among more than 1,300 youth aged 15–30 confirms similar patterns, with half of the respondents reporting that they learned less through online classes than during regular classes, across all levels of education.

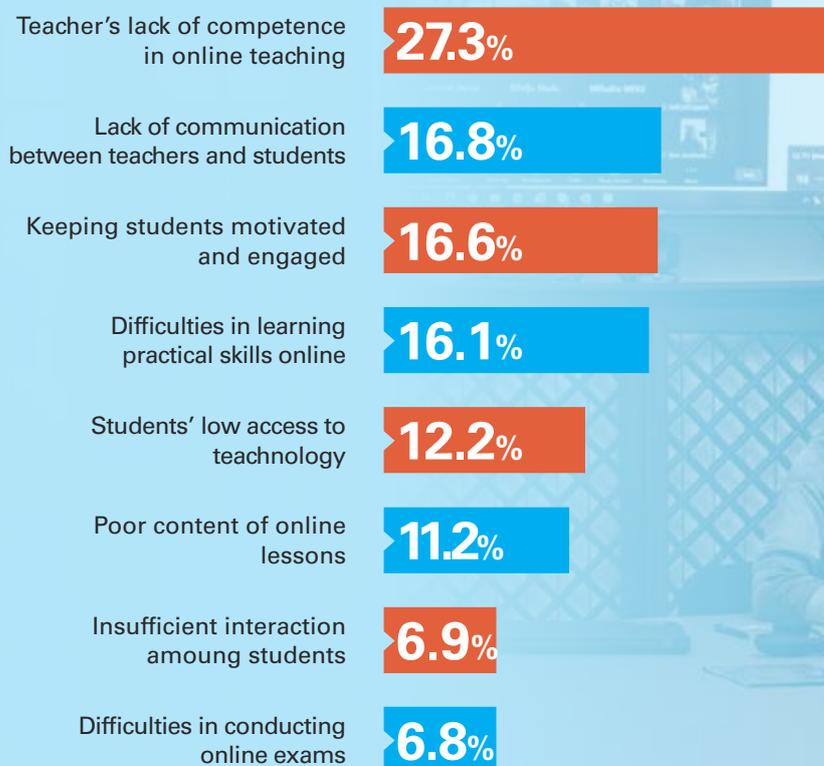
The main obstacles to effective distance learning identified by U-Reporters include teachers' lack of online teaching competences, lack of communication between teachers and students, difficulties in keeping students motivated and engaged, and difficulties of learning practical skills online. Other prominent reasons include low access to technology and perceived poor content of online lessons (Figure 25).



²⁴ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania and Ukraine.

Figure 25. Main challenges in switching to online/distance learning

Q | What is the main challenge in switching to online/distance learning?
(% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 5,596.

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The quality of online teaching and learning

Young people in ECA expressed highly disparate opinions in relation to the learning experience during school closures. Overall, the pandemic forced students and teachers to embrace online tools at an unprecedented speed, with negative consequences on their mental health. During school closures, one third of U-Reporters from eight countries²⁵ reported feeling stressed, particularly 20–24-year-olds.

When asked to describe the learning experience in one word, most participants of the in-depth consultations used negative words such as boring, unorganized, catastrophic, ineffective, exhausting or difficult, as indicated in the word cloud in Figure 26.

Overall, young people expressed a clear preference for face-to-face learning compared to distance learning. As indicated in Figure 27, 60.3% of U-Reporters from seven countries²⁶ indicated a preference for face-to-face learning, while 23.6% equally enjoyed face-to-face and distance learning; only 14.1% of the sample expressed a preference for distance learning (Figure 27).

²⁵ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

²⁶ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, and Ukraine.

Figure 26. Most frequent words in response to the question on students' learning experience during the pandemic

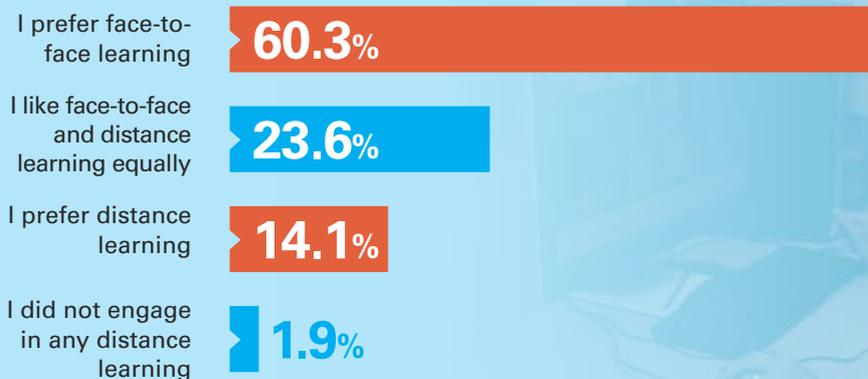
Write one word that describes your learning experience during the pandemic?



Source: In-depth consultations with youth, July 2020.

Figure 27. Youth's experience with distance learning

Q | How was your experience with distance learning during COVID-19? (% of respondents)



Source: U-Report polls, June–July 2020
 Note: Number of respondents is 4,545.

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Teachers' competence

Quality online teaching and learning are highly dependent on the skills of both educators and students. PISA 2018 results revealed that 60% of 15-year-old students in Croatia and 90% of students in Kazakhstan were enrolled in schools whose principal agreed or strongly agreed that teachers had the necessary technical and pedagogical skills to integrate digital devices in teaching. Similarly, the percentage of students in schools whose principal agreed or strongly agreed that teachers had sufficient time to prepare lessons integrating digital devices ranged from 55% in Bosnia and Herzegovina to roughly 85% in Georgia (OECD, 2020e).

However, a recent ETF mapping of the responses of education systems in ECA during the pandemic revealed that the teachers' capacity to provide online distance learning has been a major constraint to the learning process (ETF, 2020b). This was particularly evident at the beginning of the pandemic when teachers found themselves extremely unprepared for the sudden and unprecedented shutting of schools and were asked to recreate a learning environment that was 100% virtual.

The opinions of youth from the region confirm these findings. Their overall view is that that teachers struggled with the transition of classes to the digital sphere. More than 27% of U-Reporters from seven countries²⁷ identified the lack of skills for online teaching as the number one factor that contributed to making the distance learning process so challenging, followed by the lack of communications between students and teachers, and the ability of teachers to keep students motivated and engaged.

Some of the teachers didn't know how to use computers or the applications we were using, and were not able to make things more comfortable for the kids in this new reality...it is impossible to transfer lessons from the classroom to the online space. We need to change the format, to add some entertainment, to make it more engaging, to include other activities – it is boring to sit every day in front of the computer. (Ana, 18, Georgia)

Ineffective teaching methods and loss of motivation

Teachers have been on the frontlines of the pandemic response, working hard to ensure that students continue learning in every way possible while their own daily work has been significantly impacted.

While recognizing that some teachers made every effort to make the distance learning process as comfortable as possible, young people reported that the inability of teachers to use interactive methods negatively affected the quality of education during the pandemic. Specifically, very often teachers used the same methods as in face-to-face teaching while asking students to perform an increased amount of homework and exams with less support. This often led to students' exhaustion and increased stress.

One of the main factors of stress was the perception that the move to online learning was too abrupt and teachers were caught unprepared, with negative consequences for students. Indeed, students felt confused about the real value of their work and the level of their competences due to a perceived unfair assessment system.

I got an 8 out of 10. I wanted to know why. I sent an e-mail, a message, but she (the teacher) never replied. If this had happened in a real classroom, I would have been able to ask her in person. (Mahammad, 19, Azerbaijan)

Students also felt that the lack of face-to-face interaction with teachers led to an overall decrease in teachers' accountability with respect to student grading. Furthermore, they felt that there was an urgent need to train teachers in how to monitor, offer feedback on and assess students' work online. Nevertheless, they also recognized that a change in the attitude of students is needed, i.e. from cheating to obtain higher grades, to understanding why each lesson is useful and how they can objectively evaluate their own efforts and monitor their own growth process.

The large amount of time spent in front of the screen was also mentioned as a factor that caused severe concentration loss and fatigue, with negative consequences on learning outcomes, particularly for the most vulnerable students.

²⁷ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania and Ukraine.

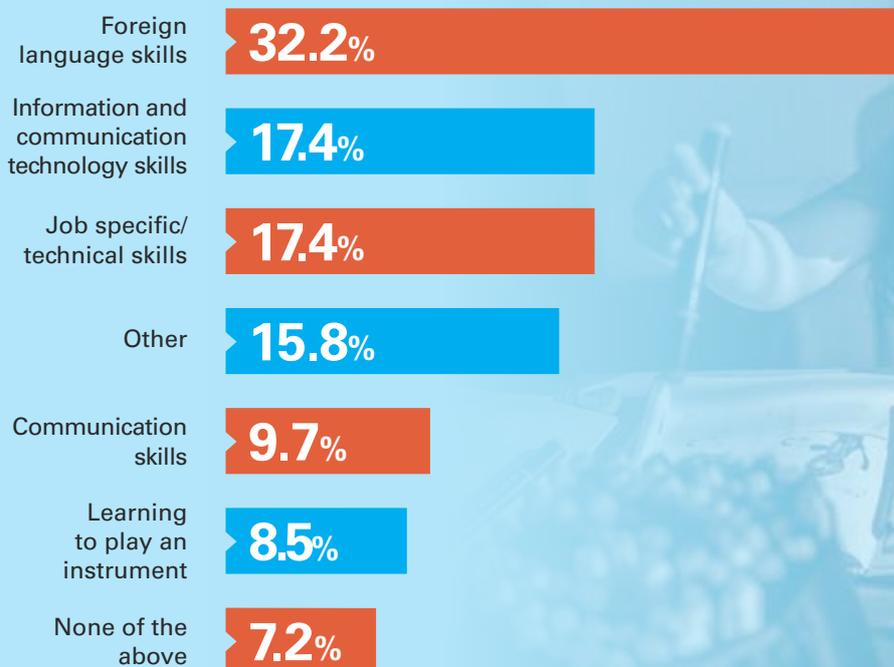
The skills gap

When asked about what tools and skills could have helped them deal more efficiently with learning from home, most participants agreed on soft skills. They felt that being equipped with time management skills, stress management skills and flexibility would have made their adaptation process to online learning smoother and that they would have avoided an enormous amount of distress. Digital skills were also mentioned as fundamental for both students and teachers.

However, young people in ECA thought that the lockdown had some positive outcomes in terms of enhancing their skills. For example, U-Reporters from eight countries²⁸ revealed that more than 67% of them used the time of the lockdown (away from school or work) to develop new skills or to learn something new: 32.2% reported improving their foreign language skills, 17.4% learned job-specific or technical skills, and 17.4%, ICT skills (Figure 28).

Figure 28. Skills and topics learned during lockdown

Q | Which of the following skills/topics did you learn?
(% of respondents)



Source: U-Report polls, June–July 2020.
Note: Number of respondents is 7,265.

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²⁸ Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Romania, Serbia and Ukraine.

An opportunity for change

Despite the overall negative picture, some youth in the ECA region felt that the shift to online education added flexibility to teaching and learning. For example, distance learning provided more time and increased availability of resources for self-study. They also appreciated the opportunity to learn at their own pace and to learn from mistakes by retaking tests. They welcomed the increased opportunities to join online educational and skills-building programmes from all over the world, which would not have been possible prior to COVID-19 due to the high costs of in-person tuition.

Young people also recognized that in a scenario where distance learning became the new normal, the role of teachers became even more important than before COVID-19. Specifically, they believed that teachers had a pivotal role in influencing students' learning. In the post-COVID-19 scenario, the teacher would need to increasingly become a coach who would support young people with individualized approaches in order to build on their strengths, help them access new technologies, navigate information correctly and build skills to support their transition from school to work. Teachers would also support young people to 'connect the dots' between different sources of information, build their capacity for discernment and critical thinking skills, and help them navigate a globalized and interconnected world as engaged and environmentally conscious citizens. In this context, participants of the in-depth consultations viewed the COVID-19 crisis as an opportunity for teachers to improve their capacities through increased opportunities for self-learning and research.

Online learning had some advantages, too. It destroyed all the boundaries; I was able to join webinars from all over the world. (Ana, 18, Georgia)

The online teaching had its ups and downs. In my case, it was effective. I didn't have to spend more than three hours on the computer. Teachers in my school tried to organize interesting lessons; there were lots of different activities. I received the knowledge I needed. The children who did not have computers had the lessons on TV. Many of my friends liked the online teaching. (Davit, 15, Georgia)

2.5. YOUTH MOBILITY IN TIMES OF COVID-19

Youth mobility²⁹ is a central component of European cooperation on education and training to improve formal, informal or non-formal learning, which is based on the principle of free movement of European citizens. According to UNESCO statistics, in 2017, over half a million young people from ECA countries, almost twice as many as in 2007, crossed a national border of their country and moved to another country to obtain a tertiary education. The number of outbound, internationally mobile tertiary students studying abroad increased in almost all ECA countries during 2007–2016, except for Albania, Bosnia and Herzegovina, and North Macedonia (Annex Table A-4).

Seeing another culture and another country and understanding how people around the world live under different conditions helps you to understand what they are doing and why they are doing certain things. (Isaac, 18, Kazakhstan)

²⁹ Glossary on youth, <https://pjp-eu.coe.int/en/web/youth-partnership/glossary>.

COVID-19 is likely to reverse an increasing trend in the education mobility of young people from ECA countries, because travel bans, visa restrictions and safety concerns in 2020 may encourage potential students to change their plans from pursuing education abroad to studying in their home country. They may postpone enrolment until the end of the pandemic and the containment measures in their desired country of destination and move to another country that has already brought the pandemic spread under control. Alternatively, they may choose not to pursue tertiary education.

Less travel, more digital platforms

Available reports confirm that the COVID-19 crisis had a highly disruptive effect on the mobility and freedom of movement for young people in the ECA region.

In March 2020, a European-wide survey conducted by the Erasmus Student Network (ESN, 2020)³⁰ gathered the experiences of 22,000 higher education students and trainees across Europe regarding the impact of COVID-19 on their mobility experience. The research focused on international exchange students who were either abroad during the spring of 2020, or who were planning to be on an exchange but had their studies interrupted. Data reveal that almost two thirds of the students' mobility periods continued, with half of them moving to online classes, 34% to classes that were partial online or partially postponed. The proportion of students who stayed in their exchange destination decreased slowly during the period of the survey. In the context of the pandemic, 37.5% of the students experienced at least one major problem related to their exchange. The most common problem was the loss of transportation to return home, followed by accommodation and access to basic needs such as food and sanitary products.

The COVID-19 crisis also affected ongoing and planned activities under the Erasmus+ and European Solidarity Corps (ESC)³¹ mobility programmes, as highlighted by the European Commission Survey on the Impact of COVID-19 on Learning Mobility, conducted in May 2020. As the COVID-19 pandemic gradually spread across Europe, and participating countries introduced social distancing measures at a different pace, approximately 75% of 11,800 respondents reported that their activities and projects were negatively affected by the pandemic in various ways: 42% continued activities under different arrangements (i.e. distance or online learning); 22% had their activities suspended; and 36% had their activities cancelled. In addition, 75% of the affected participants returned home, whereas around 25% of the affected participants stayed abroad, among whom more than 50% were participants in the European Solidarity Corps and only 10% were participants in vocational education and training, and school education.

In the Western Balkans, the COVID-19 outbreak also led to the suspension of youth mobility programmes³² promoted by the Regional Youth Cooperation Office (RYCO)³³ with the aim to foster regional solidarity and social cohesion, combat stereotypes and boost reconciliation among youth.

Participants of the in-depth consultations confirmed that COVID-19 negatively affected their mobility, with many of their projects and activities in the areas of education and learning, work, internships and volunteering moved to online modalities, postponed or cancelled. The cancellation of plans had important negative consequences for some of the young people, while others described the situation as both challenging and adventurous. The perspective of youth with disabilities was particularly interesting

Based on the survey's sample, it can be observed that:

- more than 107,000 participants in Erasmus+ mobility were affected by the COVID-19 situation;
- close to 45,000 participants continued their activities with different arrangements (i.e. distance or online learning);
- for more than 23,500 participants, activities were temporarily suspended;
- for more than 38,500 participants, activities were definitely cancelled;
- more than 80,000 of these participants returned home, while 27,000 stayed abroad.

Source: European Commission Survey on the Impact of COVID-19 on Learning Mobility (May 2020).

³⁰ Erasmus Student Network (ESN, 2020).

³¹ European Youth Portal, Information and opportunities for young people across Europe. Available at https://europa.eu/youth/solidarity_en

³² The statistics on the impact of COVID-19 on RYCO mobility programme beneficiaries are not currently available.

³³ RYCO, www.rycowb.org/?p=8096

because they also viewed the lockdown as an eye opener for the world on the consequences of mobility restrictions for those who live with a disability. A survey conducted by UNICEF among more than 2,000 students in Italy revealed that almost 3 students in every 10 declared that the COVID-19 emergency had influenced their future plans for learning (UNICEF ECA, 2020). Some were making major changes, including abandoning schooling or professional training away from their homes.

I am a person with a disability. Mobility for me has always been hard. I can't use public transport because it isn't accessible. For me, this situation is a message to other people: hey, people like us live between four walls, for all of our lives. I applied to the university, and today, I received the information that it's going to be distance learning. It will be the first time in my life. Here, when you have a disability, the school has to provide you with teachers for every subject who come to you and walk with you. This is unexpected and exciting. (Isaac, 18, Kazakhstan)

For those who suffered from restrictions on mobility, the lack of person-to-person interaction with teachers and peers was described as the major factor that often led to increased depression, anxiety, lack of motivation and uncertainty about the future.

Nevertheless, many young people also highlighted some positive aspects of the mobility restrictions, including:

- more time for self-learning and more affordable and accessible learning opportunities;
- increased attention to the environment and to issues related to 'a greener planet';
- increased self-awareness and the realization of the importance of caring for each other in difficult times.

Not being able to travel made us more aware of the importance of being close to each other, not in terms of being friendly, but at a political level (...). Not having this makes us stop for a while and think about improving relations with each other. The crisis has enabled us to look at things differently. (Nikolija, 18, North Macedonia)

We need to respect social distancing measures. Nevertheless, there is nothing more precious than human contact. (David, Italy)

2.6. THE IMPACT OF COVID-19 ON YOUTH PARTICIPATION AND ON THE WORK OF YOUTH-SERVING AND YOUTH-LED ORGANIZATIONS

The COVID-19 crisis is showing how young people possess the collective power to influence change in their lives and in their communities, and call for bold reforms at national and sub-regional levels.

Youth are ready to help. The government and decision-makers from different sectors should sit at a table with us to hear our ideas. If we want to get better, we should work together because we are the same community.
(Kritijan, North Macedonia)

Since the beginning of the pandemic, young people in the region have played a critical role in mitigating the impact of COVID-19, demonstrating leadership in their communities by initiating and participating in different activities. For example, together they created and disseminated prevention messages (e.g. on hand-washing, respiratory hygiene, physical distancing, staying home, facemasks, testing, steps to take in case of symptoms) through virtual platforms such as TikTok and Facebook, and promoted adherence to containment measures.

Young people in the ECA region see the crisis as an opportunity for collective action. They feel that youth can bring to the table innovative solutions with social impact, and play an active role, especially through new technologies.

Indeed, youth-led initiatives implemented in the ECA region have been crucial to mitigating the closure of schools and support services, addressing loneliness and anxiety, and promoting social cohesion.

Similarly, youth organizations have played an important role in mitigating the disruptions of the crisis by rapidly disseminating information among their peers and helping to contain the spread of the virus. They also provided access to educational, peer-to-peer mental health advice and other programmes to support adolescents and young adults in confinement. New initiatives have focused on providing support to the elderly and other groups at increased risk of becoming infected, and by combatting stigma and discrimination (OECD 2020d).

We created many initiatives that were meant to inform people on Facebook and TikTok about how to wash their hands, for example. We have to try and try again until the number of people who don't believe this virus even exists decreases. We should think about the people we save more than the people who still don't listen to us and become motivated to become involved and have a greater impact.
(Sebastian, 17, Romania)

For example, when the pandemic started, UNICEF gave us posters that we could spread on social media, such as on how to be safe during the pandemic, what rules to stick to. I decided to spread the posters on behalf of my school and help my colleagues.
(Anna, 15, Ukraine)

Until last month, I was a president of an organization, and we organized some fundraising activities. We bought medical devices and delivered food, and it was really appreciated by the community. It was a huge message to other people that getting involved in volunteering activities to help and promote awareness can make a change.
(Alexandra, 23, Italy)



To support young people during the pandemic, the majority of youth organizations moved their activities to the virtual space and provided continued support to project beneficiaries. According to RAY's survey³⁴ on the impact of COVID-19 on youth work in Europe, 54% of youth respondents stated that COVID-19 had affected their access to youth activities or projects in a major way. Almost all aspects of youth work had been affected by the pandemic: youth workspaces (69%), youth work methods (52%), youth work schedule (47%) and youth work tools (46%). Most organizations experienced delays and interruptions to much of their youth work; for 55% of organizations, two thirds or more of their ongoing work was delayed or interrupted (RAY Network 2020).

While young people are ready to help and feel that their engagement in the life of their communities is fundamental, they also reported that overall, and not just during the crisis, they often came across dismissive attitudes of adults towards them and experienced difficulties in being heard, particularly in the initial phase of the pandemic. During the COVID-19 outbreak, when information was either diverted from the main purpose, unavailable or inconsistent, young people felt confused, scared and unsure about what was going on.

Misinformation was one of the biggest obstacles to their active participation in the COVID-19 response. According to young people, the pandemic is characterized by disinformation, fake news and conspiracy theories, leading to a major emotional impact on them. Moreover, youth felt the ongoing conflict between information from ministries of health and the media created a situation in which fear and hate were easily spread.

We need to create equitable opportunities for young people. Investing in youth participation and engagement is often seen as an investment only for young people, but not for the entire society. We need to change this mentality.
(Trina, 19, Kosovo)

As digital natives with high levels of Internet literacy, young people also have a role in identifying misinformation, fake news and human rights violations. In this context, many provided examples of how, during the pandemic, they are fighting disinformation among their peers through blogs and vlogs. Nevertheless, the lack of digital and media literacy among the most vulnerable was identified as a factor that transforms them into an easy prey of online bullying and hate speech.

Youth in ECA recognized that, in the context of the crisis, they would have liked to offer feedback to stakeholders about messages on COVID-19 prevention and recovery plans, with the aim of transforming what they perceive as one-sided communication into an actual dialogue. The young people consulted identified partnerships between the government, the private sector and NGOs as fundamental to support their participation in finding sustainable solutions towards more inclusive and sustainable societies.

³⁴ Research-based analysis of European youth programmes.



3

AN AGENDA FOR RESILIENCE AND RECOVERY

Building on the above analysis and youth's opinions about the impact of COVID-19 on their life, the following key findings and messages bring together the voices of 15,269 young people across 23 countries in ECA. It is our hope that these voices will inform the recovery agenda, inspire immediate actions

to support youth in the region, and provide the rationale for investments in education, transition and employment, social welfare, mental well-being and participation of youth to build resilient and sustainable societies.

3.1. REBOOTING SOCIETIES, STRENGTHENING PARTICIPATION, SOCIAL COHESION AND INCLUSION

The COVID-19 crisis has exposed key fracture lines across societies. The pandemic has highlighted and worsened pre-existing and systemic inequalities, affecting everyone, including young people. In addition to the impact of COVID-19 on the health systems of all countries, the pandemic has disproportionately affected people living in the most deprived communities, holding the most precarious jobs, having lowest levels of education and skills, poorest health, or inhabiting the most crowded and unhygienic environments.

In the ECA region, the economic and social consequences of COVID-19 have diverged across countries and within countries. Governments are experiencing enormous pressure to rapidly adapt to the new realities imposed by the pandemic and to buffer its impacts on all aspects of life, including health, education, employment, the economy, culture, social cohesion, as well as national security.

According to young people in the ECA region, inequities between and within countries have been exacerbated and have become more visible with COVID-19. This has resulted in social upheaval that may include increasing polarization and radicalization within societies. The uncertainty around COVID-19, the looming prospects of massive job losses and fears about the future may create fertile ground for manipulation and resentment, which is sometimes directed at particular segments of the population, such as migrants, refugees, ethnic minorities, and nationals of foreign countries.

However, the crisis also generated more awareness about the inter-dependence among countries, for example, in international scientific collaboration. It also highlighted the importance of solidarity across

generations, across sectors and countries. In many communities, young people were particularly engaged in various forms of volunteering as well as in a variety of digital initiatives contributing towards local, national and global responses to COVID-19 and increased social cohesion. Increasingly, their power and contributions are being recognized and acknowledged.

Screens and streets: Youth mobilization around global and local causes

Globally and in the ECA region, beyond the negative impact of COVID-19 on health, the pandemic has also led to important geo-political repositioning both within and among countries. The pandemic has presented new challenges to some old concepts, including globalization, established models of governance, global solidarity and to power, geographic and gender divisions in society. Political developments that have coincided with the COVID-19 crisis have revealed a tendency to question the role of authorities as well as the emergence of vibrant and diverse on-line and public debates around a range of issues, from the actual handling of sanitary measures or economic decisions, all the way to social upheavals due to local unemployment, inequities and impact of the crisis on poverty and deprivations.

In different contexts, there have been examples of both a tendency to impose strict controls and limitations of freedoms under the guise of protection from the epidemic as well as a tendency to open spaces for democratic engagement with large numbers of people voicing their views on streets, demanding their rights.

Also, some social movements turned ‘viral’, swiftly mobilizing large numbers of people worldwide to take global and local actions around causes of gender equity, racial injustice, inclusion and climate change, among others. They have demonstrated the power that communities connecting on screens and marching on streets in solidarity can have on bringing fundamental and rapid changes to how policies are developed, funding mobilized, and realities transformed. Young people are often at the core of such movements as organizers, influencers and protesters. The engagement of adolescents and youth in these social movements has sometimes resulted in their being exposed to increased risks of repression and violations of their right to peaceful assembly as granted in the Convention on the Rights of the Child. Ensuring their protection is an issue that requires consideration by policymakers. However, their engagement has also resulted in increased attention to their situation, needs and opinions, and increased recognition of their power and influence in society.

Spaces for voices: Building platforms and mechanisms for youth engagement and activation

To enhance social cohesion in the ECA region, it will be necessary to create opportunities to systematically engage diverse groups of young people and work with them towards strengthening their sense of trust, confidence and contributions to democratic processes and to local and national governance mechanisms. To this end, youth in ECA are demanding the establishment of more permanent platforms for dialogue with institutions at the community, national and local levels that would allow their voices to be heard.

As the COVID-19 pandemic pushed many aspects of life onto the online/digital sphere, it also revealed the vast potential of these platforms to act as great ‘equalizers’ giving an equal chance for many more young people to participate than some of the traditional forms of youth participation. For example, online platforms allowed many more youth to become involved in youth consultations, dialogue and collective action regardless of whether they were from urban or rural areas, male or female, in high schools or universities, or from poor or wealthy families.

The creation of diverse mechanisms and platforms that give opportunities for systematic youth engagement and activation in order to co-create change should be among the top priorities for governments and inter-governmental and youth organizations in the ECA region. A variety of approaches could be used to hear the voices of youth.

The 2019 Bucharest EU Children’s Declaration on Child Participation in Decision-Making provides recommendations to EU Member States on how to foster youth participation at the community, national

and European level. Mechanisms in place such as the U-Report platform can be instrumental for institutions at national and EU levels to listen to the voices of adolescents and engage them in policies and programmes in the recovery process, providing real-time information to countries in ECA and the EU to help inform national policies and programmes. They also allow to monitor the implementation of the EU Youth Strategy and the 11 EU Youth Goals.

The approaches used by the Child and Adolescent Friendly Cities Initiative in countries such as Belarus, Croatia, Serbia and Ukraine, which includes mechanisms for involving youth in local governance, can be replicated in the region. Expanding this access to platforms and mechanisms by many more young people through the use of digital and online participation platforms should be considered.

 **I think young people become more confident and enthusiastic when they see that their views are taken seriously and acted upon. They start to feel increased responsibility; they are more likely to engage in the local community, to participate in student councils...**
(Sergey, 17, Armenia)

Youth-led and people-centred solutions for rebooting and rebuilding societies in the ECA region

The current generation of youth is more connected than any previous one. Many youth who were consulted felt that their access to information and knowledge went well beyond that of their parents and exposed them to issues far larger than those affecting their local communities or countries. In their eyes, COVID-19 represents an opportunity to rethink and reshape societies, and bring forth a different model of growth and development. Young people aim at an inclusive prosperity that goes beyond national economic growth and adopts, for example, notions of global solidarity, global citizenship, respect of rights, acceptance of differences, and climate and environmental protection.

According to youth in the region, the nature of the COVID-19 crisis calls for new cooperative models of societal engagement between them and governments, the private sector and communities

(including parents) in order to tackle common problems. It is critical that inter-generational dialogue, cooperation and inclusive decision-making underline the recovery process. Young people expressed the need to strengthen the youth sector to facilitate development of people-centred rather than system-centred solutions and recovery.

The future is ours, and when I say ours, I am not just talking about the future of young people, but everybody's future. We (young people) are the ones who cannot vote and we are not listened to, but we pay the consequences of adults' decisions, while we are not even asked for our opinion. We need national and international authorities to work hand in hand with us. They need to listen to the voice of youth; they have great things to tell.
(Alexandru, 15, Romania)

Creating opportunities for young people to become engaged around key societal issues has become a priority for many governments, civil society organizations and international and inter-governmental partners, as well as for young people themselves. Approaches that use human-centred design such as Upshift, innovation Labs, hackathons or similar initiatives that bring together young people working in teams to develop solutions for local problems should be supported and scaled up. Such initiatives are critical because they build competence and give a sense of agency and a deep sense of meaning to young people as they are able to contribute towards the well-being of their communities.

In this context, the Next Generation EU recovery plan offers an opportunity for youth to contribute to solutions in the economic, social, digital and environmental COVID-19 agendas.

Community connectedness and social cohesion for well-being

A sense of connectedness and belonging to peers, families, schools, communities and society is a key factor of youth wellbeing, mental health



and resilience. Although achieving community connectedness, social cohesion and solidarity can be challenging during a pandemic, young people think that this is crucial in the recovery process. With face-to-face interactions and activities suspended or moved to the online space, it is crucial to develop opportunities that connect young people and help them overcome feelings of loneliness, isolation, stress and social exclusion brought by the pandemic.

Increased levels of mental health disorders, including stress, anxiety and depression, have been reported in many countries in conjunction with the COVID-19 crisis. Young people and youth organizations have systematically identified mental health as one of their top concerns in relation to COVID-19. The crisis has generated increased demands for information, psychosocial support and mental health services among youth, and has contributed towards reducing the stigma associated with mental health conditions. It has also increased global attention to the lack of investments and insufficient access to mental health services in all countries.

In order to build the resilience of young people, it will be important to provide them with resources that can improve their overall health literacy, including in relation to their mental health, and facilitate their access to online and offline support and services such as counselling and referrals to help them build their emotional and coping skills to deal with stress, anxiety and other mental health challenges.

Programmes, platforms and opportunities that foster solidarity, a sense of belonging, and social cohesion within and among countries are even more fundamental during a global pandemic that has reinforced mistrust, border closures and mobility limitations. Recent decisions adopted by the EU Commission to increase funding for Erasmus+ are commendable as a concrete way to foster young people's connectedness and social inclusion.

European Solidarity Corps volunteering opportunities are very important. You go to another country and help one community. At the same time, you develop some skills. It is a win-win situation. You don't go there expecting something in return, but you get a lot at a personal level through these kinds of experiences.
(Iulia, 18, Romania)

Nevertheless, stronger efforts are needed to make these programmes more flexible, more accessible and relevant for reaching the most marginalized young people. To this end, young people in the ECA region suggested that additional Erasmus+ national/regional offices be established to bring opportunities for youth exchanges and mobility closer to their communities. Alternatively, structures already in place such as youth centres and NGOs working with the most marginalized youth could play a crucial role in reaching out and supporting the most marginalized youth, thus widening their participation in these programmes.

Skills development for active and digital citizenship

Young people perceive citizenship education as fundamental for acquiring the competences and skills they need to participate actively in the life of their communities and countries, both offline and online. This goes hand in hand with creating youth-friendly content from verified sources of information and providing them with digital literacy skills.

We had too much information, too many channels. Governments should focus on the digital literacy of young people and help them understand the different sources of information. Young people have the biggest role to fight fake news. Fake news is as dangerous as the pandemic itself.
(Davit, 24, Armenia)

Successful experiences in some countries have included programmes such as Podium and Ponder. Podium is reaching the most marginalized young people and teaching them how to advocate for their rights, providing them with practical tools to enhance their public speaking skills, their competence and confidence. Ponder works with marginalized youth to foster their media literacy skills and empowers them to approach information critically, to be able to discern “fake news”, identify and examine bias, and to judge the value, authenticity and authority of the information they encounter.

Similarly, programmes such as Erasmus+ provide a basis for youth to acquire skills for personal empowerment and active citizenship, and be able to participate through multiple platforms in formal, non-formal and informal education and development initiatives.

Think globally, act locally: Youth engagement promoting small actions for planetary changes

As the COVID-19 crisis brought to a halt many aspects of human activity, such as transport and mobility, awareness of climate change and debates about the interaction between human and animal habitats, and their potential impact on health increased.

Our parents and grandparents didn't have information about recycling, separating waste, or the use of solar panels. Our role is to teach our children about these issues. (Ilya, 18, Belarus)

Youth from the ECA region believe that they can play an important role in the post-COVID-19 recovery process by becoming more aware of the impact of their choices on the planet. They believe that attention needs to focus on raising awareness and changing mindsets of people towards the climate crisis and the adoption of healthier and environmentally friendly lifestyles. They call for the inclusion of environmental education in formal and non-formal education, allowing for children and youth to obtain the knowledge and skills to adopt sustainable choices and make their homes, schools and communities more environmentally friendly. They want to be involved in decision-making at the community, national and international levels through mechanisms for structured participation. Meaningful youth participation through the Climate Pact and other similar initiatives will be key to the success of the European Green Deal and for the achievement of the planet-oriented SDGs.

Support for digital youth work

COVID-19 has resulted in profound changes and continues to generate a context of prolonged uncertainties about the future economic and societal prospects of young people. Supporting the young people who are the most vulnerable through youth work and services is essential. Although countries in the ECA region are significantly divergent in terms of funding for youth workers and youth-dedicated infrastructures, the COVID-19 pandemic highlights the importance of supporting vulnerable youth and the potential for integrating digital

technologies into youth work. As emphasized by the Group of European Youth for Change and the PRISMA European Network, this could also support other important areas, such as youth participation, skills development, entrepreneurship, non-formal education and youth engagement in climate actions. With this in mind, more long-term structured programmes and resources are needed to scale up and expand youth work programmes and train and assist youth workers in using digital technologies to achieve broader reach and better results in supporting the most vulnerable adolescents and youth.

3.2. REIMAGINING EDUCATION, TRAINING AND POLICIES FOR HUMAN CAPITAL DEVELOPMENT: INNOVATIONS AND FLEXIBLE SOLUTIONS

Worldwide, the COVID-19 crisis has greatly advanced years of research on the importance of schools as stable learning environments. The pandemic has stimulated innovation within the education sector, creating new alternative or complementary ways of teaching and learning across all grades, education levels and qualifications. In efforts to mitigate the effects of the pandemic, governments in the ECA region have focused on ensuring the continuity and delivery of educational content. Concurrently, the European Commission through its policies and support programmes is helping countries of the region develop viable learning solutions, including reskilling and upskilling programmes. Examples include: the recently adopted Digital Education Action Plan, 2021–2027; July 2020 guidelines on blended learning in school education; and Pre-Accession Assistance (IPA) and European Neighbourhood and Partnership Instrument (ENPI) interventions. There is a genuine commitment by all involved to prioritize in policy the provision of quality, inclusive education and high learning achievements for the development of human capital in a green and digital economy.

It is yet not clear to what extent learning outcomes have been affected by the change of methods of work and the sudden shift to distance and online education models. Nevertheless, it can be stated that, despite possible severe losses in education, particularly with regard to the quality of provision, access to educational opportunities, and skills and competence acquisition, there might also be gains associated with the crisis, including a push for innovative ways of teaching and learning.

It is undeniable that COVID-19 has accelerated the longstanding debate on the need for reforms in education, in particular on the implementation of flexible teaching and learning models as well as skills development and learning outcomes. In response to the COVID-19 challenges, a wealth of global research and studies has mushroomed to help adapt the education and training systems to the crisis. However, there is still limited evidence to support future strategy and policy developments in the area of education.

Covid-19 restrictions augmented the structural challenges of the education systems in the ECA region, such as insufficient school guidance and counselling, underdeveloped learning opportunities for students with disabilities and higher dropout risks among groups exposed to poverty and social exclusion, particularly among ethnic minorities.

Isolation, online interaction and overall uncertainty about the pandemic and its restrictions have and will continue to affect both young learners, teaching staff and parents. All these various groups need adequate and timely psychological support. Current generations of learners face a greater risk of losing interest in and motivation to study. And this becomes acute since children and young people are the most exposed to the abrupt transition from traditional to digital forms of social engagement, learning, creation and, in the future, working.

Therefore, education policymakers should continue investing in the modernization of curricula, teaching methods and learning means and tools in online or hybrid format for all learners (including unified or well-structured learning platforms in each country). In doing so, they need to address equally any psychological toll of such transitions, secure inclusive and quality learning processes, provide mental health support, guidance and advice during and post pandemic.

Increasing and democratizing access to technology and innovation

The use of digital learning programmes has, more than ever, demonstrated the importance of youth's access to connectivity to learn and communicate with peers and teachers. Months of disruption in education have brought to light the need to accelerate equitable progress in education, foster youth resilience, and reduce polarization and social tensions. This can be achieved by ensuring universal access to technologies

(e.g. computers, learning tools, assistive technologies), not only in view of managing this time of emergency, but also ensuring that education and learning opportunities are inclusive and consider diverse needs across society. These include needs of children and youth with disabilities, with chronic health conditions, from ethnic or language minorities, and those living in institutions without parental or caregiver support. As we move to mainstreaming the use of technology in education and training provision, several practical issues deserve further attention, including how to provide continuous and real-time support services to use learning equipment and access to appropriate learning platforms.

Quality online learning, distance learning and blended learning for all

For decades and even prior to COVID-19, quality online learning was a priority, and a variety of online learning models and tools were tested in ECA. However, the emergency has contributed to move digital learning to the top of the education reform agenda. It has increased the pressure on education and the world of work to provide effective ways of online teaching, address the learning environment as a whole, and prepare young people for the labour market, not only by skilling them for jobs, but also by building their resilience and aptitudes for lifelong learning.

Generally, feedback by young people on distance learning in the COVID-19 context was not positive; they expressed a preference for face-to-face learning or blended learning. Some students expressed satisfaction in having the extra time and a chance to access quality online learning opportunities beyond borders, since a great deal of interesting content and lessons were made available for free. They also suggested that countries needed to change their legal frameworks, monitoring and assessment of the impact on learners and learning achievements, quality of learning and coverage. Nevertheless, in some cases, teachers as well as national authorities were able to create engaging digital environments through multiple media (videos, tests, lessons, interactions on problems, competitions among students). These successful cases shall be further explored to assess their impact on learning outcomes and their replicability in the region.

 **Blending learning will maximize access to education. Online learning is important, and traditional methods are also effective, but mixing both will give us a very good results in the long term. (Davit, 15, Armenia)**

From ex-cathedra to mentorship: Redefining the role of teachers and educators

'Generation Z', also called 'i-Generation', represents a generation of digital natives, growing up in a world of technological advances, innovation and smart devices where access to information is relatively easy, yet quality information and fake news intermingle. The COVID-19 crisis has confirmed that teachers and trainers have a pivotal role in influencing students' learning. Whereas for many years, teacher training has appeared high on the reform agenda, the focus on developing digital skills and capacities has been marginal. The pandemic has forced teachers to suddenly face an online learning environment and quickly adapt to the new challenge. During the emergency, the limited capacity of many teachers to provide online distance learning was a constraint to the learning process, and negatively influenced students' motivation, with consequences on learning outcomes.

 **Teachers have more responsibility now; they are not only teachers...they should also help youth overcome this crisis, communicating every day, be the main supporters for the kids, teaching kids, making kids as comfortable as possible, so that the learning process is not boring. Their job is harder now. (Ana, 18, Georgia)**

In the post-COVID-19 scenario, teachers will need to increasingly shift from their traditional role as "knowledge holders" to becoming mentors and coaches who support young people with individualized approaches that build on each individual student's strength, helping them access the potential of new technologies, navigate information correctly and build skills to support them in their learning paths and in their transitions from school to work. Educators will also support them in 'connecting the dots' between different sources of information, building their capacity for discernment and critical thinking skills, and helping them navigate a globalized and interconnected world as engaged and environmentally conscious citizens. This raises the issue of teachers who would need to simultaneously be knowledgeable about their own subject, be able to integrate multiple learning and teaching methods for each learner, mentor students on their individual learning and career pathways, and master the potential of digital technologies to promote changes in teaching and learning paradigms through

teamwork, project work, etc. Educational systems across the region will need to reflect on all these areas of competences for teachers and trainers to plan well in advance in order to achieve quality and inclusive education for all children and youth, as well as to ensure adequate support, working conditions and learning and development opportunities for teachers and trainers.

Learning the right skills for the changing world of work

Skills relevance is at the forefront of the education and training reforms. Long before the COVID-19 crisis, all ECA countries were engaged in efforts to bring education systems in line with the labour demand and digital and technological innovation. Many governments were offering work experience for youth from vocational education and training (VET) schools and universities, and through active labour market programmes for reskilling and upskilling. Nevertheless, only a limited number of youth had access to practical learning opportunities due to legislative issues, poor cooperation between the public and private sector, and the structure of the economies, in particular in countries where micro and small companies constitute their backbone. During the emergency, the provision of placements was largely altered by the lockdown and workplace closure measures. Nevertheless, there are several encouraging examples where practical training was delivered online through virtual, work-based learning activities for some professions and in relevant sectors. Furthermore, for certain professions, apprenticeship programmes were provided at a distance, or, in case programmes had to be stopped, some countries found solutions to offer apprentices the possibility of joining classes within their qualification area.

 **There are some labs in schools, but it is not the same as experiencing the labour market. Through internships you can understand better what happens in the world of work. Many schools are not open to innovation; they are not up to date. We need to improve research and development to catch up with new technologies. (Begum, 23, Turkey)**

There are current and foreseeable major shifts in skills demand, requiring increased digital capacities and skills across qualifications, as well as the

integration of digital and technological tools across subjects and professional domains. Accordingly, education programmes at upper secondary and tertiary levels, particularly VET-specific, need to be adapted quickly in terms of numbers (enrolment policies), content and teaching modalities to help graduates establish first contacts with the world of work through internships, traineeships, apprenticeships, or entrepreneurship incentives.

Moreover, focus will need to be placed on improved “skills intelligence” through better monitoring, forecasting and understanding of what skills and investments will be required and on developing national skills strategies that align policies with more impactful investments. The provision of reskilling and upskilling programmes for young people, as well as tools for supporting individuals to access learning throughout life will be needed. However, this can only be a promising path if combined with complementary incentives for the business world. Only then will companies be able to take on board young people, even in times of difficulties and post-recovery scenarios. This requires careful incentives by governments, increased cooperation with the private sector, and a joint vision of resilience, inclusion and social cohesion.

Socio-emotional learning and 21st century skills for 21st century citizens

COVID-19 has shed light on the need for people to have the skills to change and adapt to unstable and unpredictable realities and rapidly changing socio-economic circumstances. The importance of flexibility and adaptability to rapidly changing circumstances is increasingly recognized, making the case for accelerating efforts towards a competency-based curriculum in the region. A focus on building soft and transferable skills as well as digital skills is even more important for economic and social advancement, enabling youth to enhance their resilience and adapt to a fast-changing world. Current curricula for socio-emotional learning need to be revisited and aligned.

In addition, the COVID-19 emergency has also brought increased recognition of the importance of providing young people with socio-emotional or “life-skills” needed for building their resilience and capacity to cope with health, including mental health challenges. These include: social skills (e.g. communication, cooperation, leadership, respect for diversity); emotional skills (e.g. emotional regulation, self-management, distress tolerance, mindfulness, gratitude); and cognitive skills (e.g. creativity, critical thinking, intellectual humility, problem solving, decision making, future orientation). Increasingly, it is recognized that these kinds of skills are important for emotional wellbeing and resilience and can be built through a variety of on-line and off-line initiatives, often involving schools, youth centres, parents and communities with the aim of supporting young people to become active engaged citizens.

Increasing virtual and in-person opportunities for global youth mobility

Youth mobility is a central component of the European cooperation in education and training to improve learning and practical work experience while contributing to mutual understanding of cultures. The Erasmus+ programme has opened mobility opportunities to very large numbers of youth across the world from different backgrounds and helped open minds and build relationships. Most countries in the region take part in EU mobility programmes, with a good uptake by young people. However, COVID-19 is likely to reverse an increasing trend of

youth mobility, given travel bans and safety concerns in uncertain times. The emergency disrupted ongoing and planned activities, impacting the physical mobility of young people and their engagement in Erasmus+ programmes. Feedback from young people highlighted some positive aspects of staying at home, such as increased attention to the environment and the greening of the planet. However, they also voiced concerns that limited mobility can have an impact on developing peace and democracy in volatile political environments. Virtual mobility will need to be further explored and strengthened at the country and EU levels, based on good practices from the region. The 2021–2027 budget from the Erasmus+ Programme is being finalized, and it is hoped that the planned increase will help address the youth mobility crisis.

3.3. SAFEGUARDING, REBUILDING AND REIMAGINING JOBS FOR YOUNG PEOPLE AMID THE COVID-19 CRISIS AND RECOVERY

The COVID-19 crisis has had a large negative effect on economies and labour markets in the ECA region. Lockdowns and restrictive measures have drastically diminished economic activity of many enterprises and put people at risk of losing their jobs and incomes. This is especially relevant for women, low-skilled workers, individuals working in the informal sector, and for youth, whose employment is generally more vulnerable. Several economic sectors have been particularly hit by the pandemic, including transport, tourism, hospitality, food services, entertainment and retail trade, which provide employment for a large share of young workers. Governments have introduced different measures to support enterprises and individual workers, but they are mostly temporary and cannot fully prevent the likely unemployment shocks in the foreseeable future. Many governments have prioritized wage subsidies that are extremely expensive and not fully sustainable without significant reductions in other spending categories.

Moreover, the crisis brought into focus some important contemporary employment and training issues. In a context where remote working and flexible working arrangements have been boosted, questions are raised about how to make employment and social policies more robust, and labour markets more resilient for youth. Overcoming the consequences of the pandemic will require time and multiple adjustments. There is a need to consolidate systems to better support the transition of young people from education to employment, and secure better social protection for a young workforce, since youth are more exposed to precarious forms of work.

Policymakers from the ECA region have reacted swiftly and devised targeted actions to safeguard jobs and help companies and individuals in the wake of the pandemic. European and international organizations have also adjusted their funding programmes for countries of the ECA region and deployed significant expertise for monitoring and managing the effects of the crisis.

Overall, most actions marking the socio-economic policy responses to the pandemic in 2020 have been short-term and in the form of subsidies for businesses to stay afloat and to avoid job shedding. However, longer-term strategies are also needed, in particular to support the upskilling and reskilling of workers, newly entrants in the labour market and jobseekers.

Countries from the ECA region are not alone in their aim to reform their labour markets and consolidate their economies in the aftermath of the pandemic. Current EU and regional political priorities, such as the EU Skills Agenda and Youth Employment Support, the Eastern Partnership framework of the EU, and the regional cooperation agenda in South East Europe call for increased support to youth employment and skilling. These strategic priorities come with a package of financial resources, knowledge and expertise, and cooperation mechanisms. EU funds and programmes made available for the EU Neighbourhood region are relevant examples of opportunities to boost international cooperation in education and country-level reforms and investments in crucial sectors for the recovery (i.e. jobs, skills and innovation) as part of the overall goal to sustain green and inclusive growth.

Given that the COVID-19 crisis is far from over and its effects are forecast to last for years, economies and societies in the ECA region and around the globe are confronted with deep challenges and an inherent need to re-think employment and social inclusion policies.

Digitalization, artificial intelligence and automation of production and distribution are bound to be accelerated everywhere. ECA countries may benefit from the re-localization of industrial production, particularly manufacturing to countries of the region, thus creating new jobs. A focus on healthier and sustainable forms of food production and consumption may encourage further developments, innovations and more attractive employment opportunities in the agriculture sector.

Increasing employment opportunities for young people

Policy shifts are needed to comprehensively support youth transitions from school to work and boost their skills development and acquisition of work experiences through first-job opportunities while keeping in mind that COVID-19 induced changes in labour demands across various sectors. ECA countries could look at introducing promising youth employment interventions such as the EU Youth Guarantee, and expand these and similar initiatives to cover all youth in need – including early school leavers and young people trapped in poverty and joblessness, or exposed to poor employment conditions.

Key factors that can help facilitate successful transitions from education to employment include the creation of opportunities to gain on-the-job experience as well as initiatives aimed at transforming the education system by promoting shifts from purely academic towards practice-based learning. Young people expressed strong convictions that education can be better linked to and respond to the needs of the labour market by strengthening partnerships between schools, universities, private companies and public institutions, which should have a say with regard to the skills and competences needed, as well as the terms and conditions of youth employment.

 **Schools should form strong relationships with key actors and organize job orientation classes about the jobs required in today's world. As teenagers, we don't know where to go if someone doesn't show us the path. This bond between students and companies can also provide opportunities for internships. If the school sees that we are good in a particular skill, they could liaise with companies to help us put that skill into practice. Without practice, it is harder to understand the reality of the labour market. (Elta, 17, Kosovo)**

A skilful and resilient youth

Economic recovery and the building of a more resilient economy in the region will require a better skilled workforce with increased digital and entrepreneurship skills. A sustainable post-pandemic recovery would need vibrant and empowered youth at its heart, equipped with digital and entrepreneurial skills and critical mind-sets needed to create innovative solutions for economic and societal challenges.

It is essential to invest in education and training, in particular, upskilling and reskilling of workers, providing support to internships and apprenticeships, as well as financial and technical support for start-ups. Work-based learning and schemes for acquiring work experience should continue despite challenges posed by the pandemic. This should be combined with the timely provision of career guidance and counselling, in addition to targeted financial support. Career orientation and counselling for students should be tailored to individuals in all schools in order to provide information and assist their personal and professional growth through self-assessments, guidance and support.

Never again one pay-check away from poverty

The COVID-19 crisis and related job and income losses resulted in many people and families suddenly finding themselves in situations of precariousness. Poverty and social exclusion are widespread in the ECA region, particularly affecting families with multiple children and single-headed households. Under the strain of restrictions and economic downturns, social protection systems need to act as buffers and provide a quick income replacement and support to those affected. Even before the crisis, countries of the ECA region had fragile protection systems with limited coverage of potential beneficiaries and low-value allowances (income replacement benefits, in particular).

Social services are mostly underdeveloped and insufficient in countries of the region. In the initial phases of the crisis, most governments facilitated access to benefits (even for some categories of people who were not previously covered, including informal and migrant workers), and in some cases, increased their value. The recovery process needs to strengthen social safety nets and alternative support models, policies and programmes that would ensure that citizens (including youth) are prepared and supported in case of further shocks and crises.

The gig economy

The COVID-19 crisis resulted in a major push towards the gig economy and digital work, which are expected to continue and drive future labour market developments. Beyond employment and self-development opportunities, these types of jobs require increased resilience, flexibility and adaptability, as well as the capacity to manage multiple or less regular working assignments. The jobs also require the modernization of labour and social protection legislation, procedures and institutions so that workers may adapt to highly flexible and dynamic working contexts.

The young workforce is prominently engaged in digital and platform-based jobs. Therefore, education and training systems should include digital and entrepreneurial skills development and prioritize programmes that build resilience and understanding of labour market functioning, career development and social security aspects. However, it is also important for the gig economy to become better regulated and able to provide at least some basic guarantees and minimum standards that would protect the rights and benefits of workers and ensure decent jobs for youth.

Youth for the planet

The post-COVID-19 phase will require a much stronger reconciliation between economic recovery and the climate agenda. Young people are likely to be best placed to drive forward the green agenda in the ECA region, a region that is currently lagging behind with obsolete and polluting industrial technologies, and with an insufficient focus on renewable energy production and sustainable consumption patterns.

Young people in the ECA region believe that the economic shutdown provides a significant opportunity to redesign economies to fight climate change and environmental degradation, and invest in sustainable green economies. Ambitious international



and European priorities and targets need to be matched by an adequate level of investments since the greening of economies and societies require significant resources. It also demands new research and innovation priorities linked to climate change and more sustainable value chains. However, young people clearly expressed their enthusiasm and commitment to contribute towards a greener planet and a more sustainable future.

ECA countries may find themselves at the forefront of innovations, new technological and digital developments. Regardless of the direction of the changes, young people should be part of these changes as beneficiaries and, most importantly, as co-creators and key partners who can help design and contribute towards a better future.





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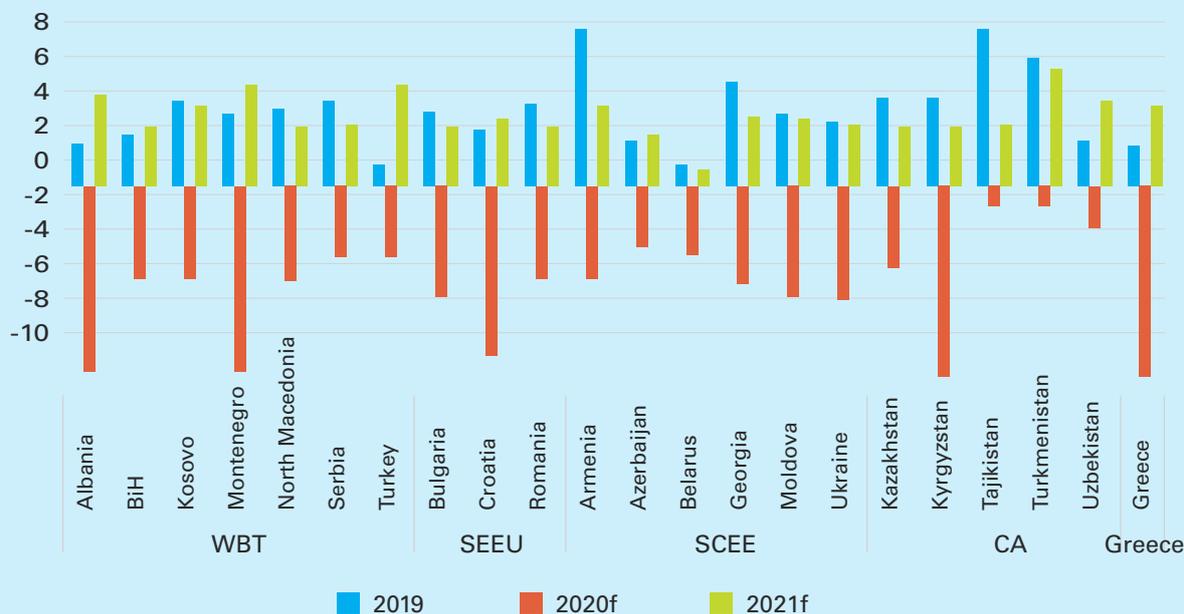
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ANNEX

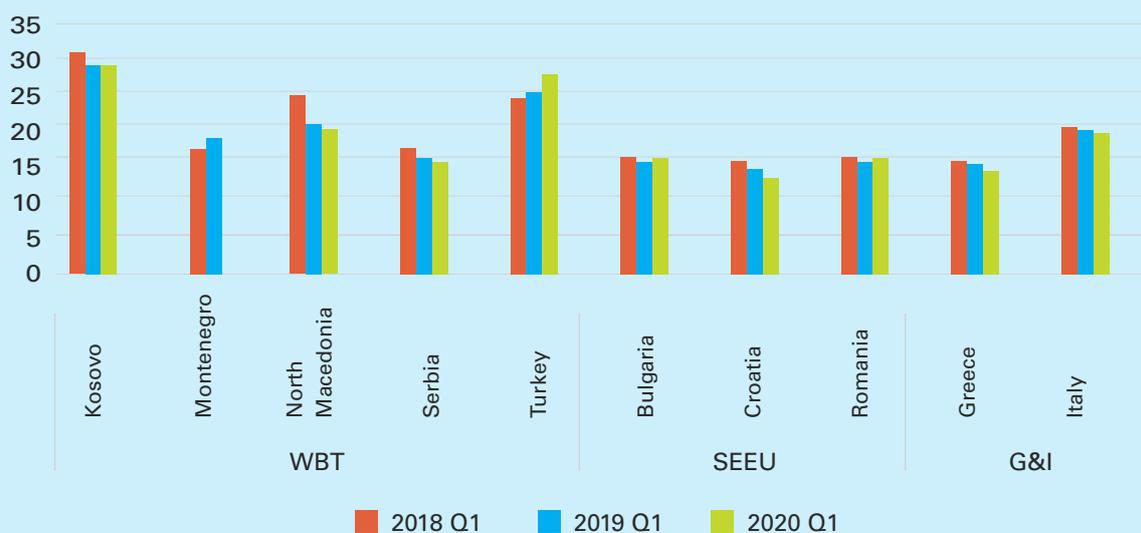
Figure A-1. Actual and projected real GDP growth (% per annum), 2019–2021



Source: EBRD (2020b)

Note: Data for 2019 refer to actual GDP growth. Data for 2020 and 2021 are EBRD forecasts as of September 2020. There are no comparable statistics for Italy.

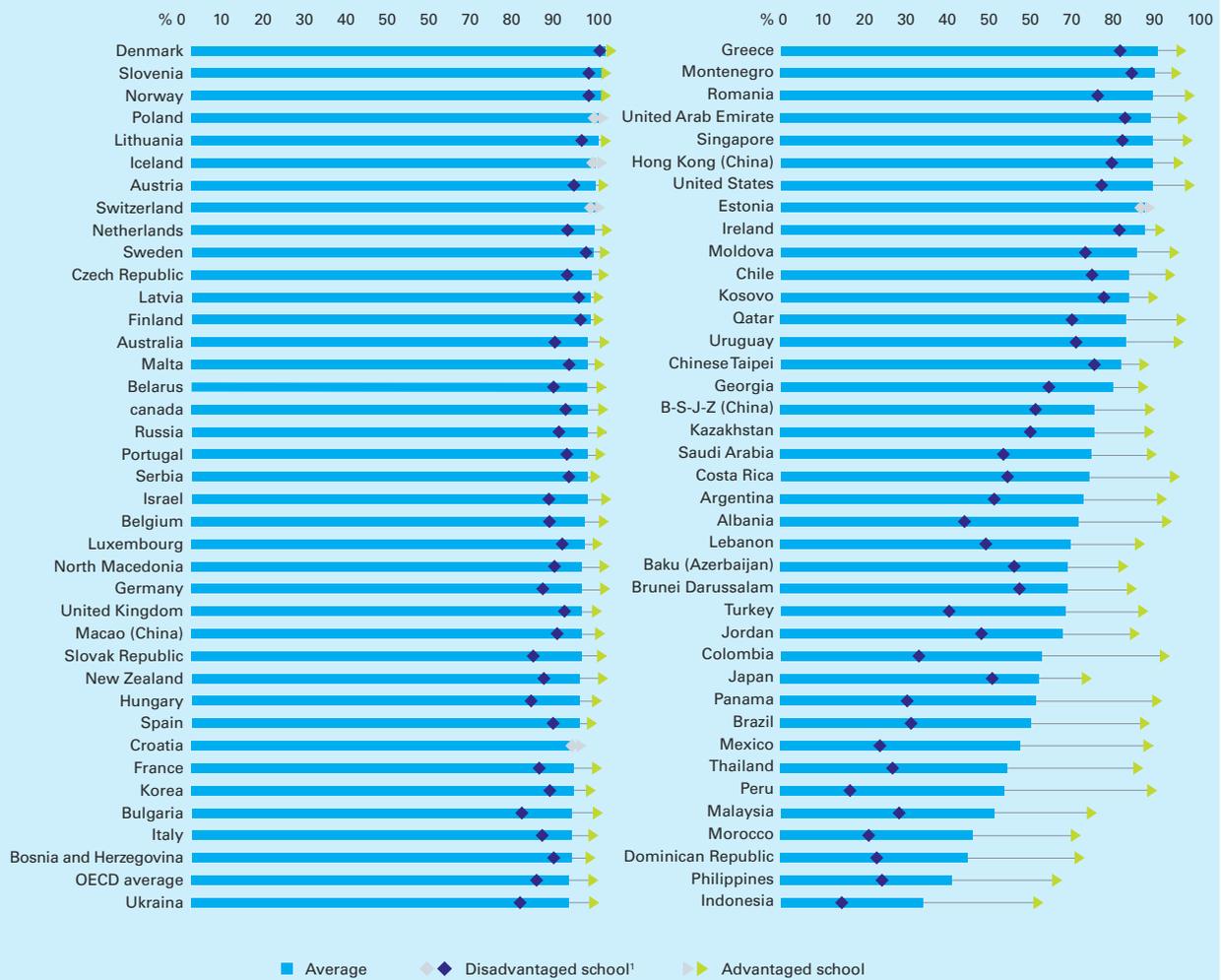
Figure A-2. Young people aged 15–24 neither in employment nor in education and training (%), Q1 2018 – Q1 2020



Source: National statistical office ASK (Kosovo), Eurostat (other countries).

Note: There are no comparable data in the other countries. There are no data for the second quarter of 2020 (as of end of September 2020).

Figure A-3. Percentage of students with access to a computer for schoolwork, by type of school (PISA 2018 results)



Source: OECD (2020e), Figure 2.

Table A-1. Government responses to COVID-19: Lockdown and restriction measures imposed in the first months of pandemic (as of June 2020)

Sub-region	Country	Business activities										Mobility			Education			
		Agriculture	Mining and manufacturing	Construction	Offline retail trade (food, necessities) and pharmacies	Offline retail trade (other)	Food services (cafes, restaurants)	Tourism and hotels	Finance, insurance, IT, real estate, professional and administrative activities	Arts and entertainment (museums, gyms, theaters, etc.)	Beauty salons	Within settlements (cities/towns)	Between settlements within the country	International	Pre-primary education (kindergartens)	Elementary (primary) schools	Secondary schools	Post-secondary and tertiary education
WBT	ALB	+	-	-	-	+	+	+	-	+	+	+	+	+	+	+	+	+
	BIH	.	+	.	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	XKX	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+
	MNE	-	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+	+
	MKD	-	-	-	+	-	+	+	+	+	+	+	+	+	+	+	+	+
	SRB	+	-	-	-	+	+	-	-	+	+	+	+	+	+	+	+	+
	TUR	-	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+	+
SEEU	BGR	-	-	-	-	-	+	+	-	+	+	+	+	+	+	+	+	+
	HRV	.	.	.	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	ROU	.	.	.	+	+	+	+	+	+	+	+	+	+	+	+	+	+
SCEE	ARM	-	+	+	+	+	+	.	-	+	+	+	+	+	+	+	+	+
	AZE	.	.	.	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	BLR	-	-	-	-	-	-	+	-	-	-	-	+	-	-	-	-	-
	GEO	.	.	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	MDA	-	-	-	-	+	+	+	-	+	+	+	+	+	+	+	+	+
	UKR	-	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+	+
CA	KAZ	-	-	-	+	+	+	+	+	+	+	+	+	+	+	+	+	+
	KGZ	.	+	+	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	TJK	.	.	.	-	+	+	+	+	+	+	+	+	+	+	+	+	+
	TKM	.	.	.	.	.	.	.	.	.	.	+	+	+	-	-	-	-
	UZB	.	.	.	+	+	+	+	+	+	+	+	+	+	+	+	+	+
G&I	GRC	.	.	.	-	+	+	+	+	+	+	-	+	+	+	+	+	+
	ITA	+	+	.	+	+	+	+	+	+	+	+	+	+	+	+	+	+

Source(s): Author's compilations based on the Acaps COVID-19 Government Measures Dataset (www.acaps.org/covid19-government-measures-dataset), the OECD COVID-19 Country Policy Tracker (www.oecd.org/coronavirus/country-policy-tracker), as well as local and international news (BBC, U.S. Embassy).

Note: + = yes; - = no; . = difficult to say (not enough information).

Table A-2. Government responses to COVID-19: Support measures (as of June 2020)

Sub-region	Country	Fiscal measures							Measures to promote burden-sharing within the private sector			
		Health system measures	Income support measures for individuals and households, excluding tax and contribution changes	Tax and contribution policy changes	Public sector subsidies to businesses	Deferral of taxes and social security contributions, and bringing forward expenditures within current fiscal year	Public sector loans or capital injections to businesses	Loan guarantees by the state, benefiting private borrowers	Support to individuals and households	Additional support to low-income families, pensioners, etc.	Targeted support to youth	Support to firms
WBT	ALB	✓	✓			✓		✓	✓			
	BIH	✓	✓		✓	✓		✓	✓			✓
	XKX	✓	✓	✓	✓	✓		✓				
	MNE	✓	✓		✓	✓	✓	✓	✓			✓
	MKD	✓	✓		✓	✓	✓	✓	✓	✓		✓
	SRB	✓	✓		✓	✓	✓	✓	✓			✓
	TUR	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓
SEEU	BGR	✓	✓			✓		✓	✓	✓	✓	
	HRV	✓	✓		✓	✓		✓	✓	✓	✓	
	ROU	✓	✓	✓		✓		✓	✓			✓
SCEE	ARM	✓	✓		✓	✓	✓	✓	✓	✓	✓	
	AZE	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	BLR	✓	✓	✓	✓	✓						
	GEO	✓	✓		✓	✓	✓	✓	✓	✓		✓
	MDA	✓	✓	✓	✓	✓			✓	✓		
	UKR	✓	✓		✓	✓	✓	✓	✓	✓		✓
CA	KAZ	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
	KGZ	✓	✓	✓	✓	✓	✓					
	TJK	✓	✓			✓						
	TKM	✓				✓						
	UZB	✓	✓	✓	✓	✓	✓		✓			✓
G&I	GRC	✓	✓	✓	✓	✓	✓		✓	✓		✓
	ITA	✓	✓	✓	✓	✓		✓	✓			

Source(s): Author's compilations based on the COVID-19 Country Policy Tracker by OECD (www.oecd.org/coronavirus/country-policy-tracker), IMF (www.imf.org/en/Topics/imf-and-COVID19/Policy-Responses-to-COVID-19) and ILO (www.ilo.org/global/topics/coronavirus/country-responses/lang--en/index.htm#AM).

Note: 'Income support measures for individuals and households, excluding tax and contribution changes', include policies such as short-time work schemes and wage support other than taxes and contribution policy changes or deferrals. 'Deferral of taxes and social security contributions and bringing forward expenditures within the current fiscal year' covers delays in tax, social contribution and other payments to the government, and bringing forward of government payments and transfers. 'Public sector loans to, or capital injections refer to off-balance-sheet measures. 'Loan guarantees by the state, benefiting private borrowers' include loan guarantees, and any capital injections or fiscal outlays. 'Measures to promote burden-sharing within the private sector' are the measures that do not have a direct fiscal cost or identified contingent liability, for example, moratoria on paying rent or utility bills, and interest payments.

Table A-3. Composition of total employment by sectors and clusters in selected ECA countries (%), latest year available

Sub-region	Country (year)	1=Critical, highest risk		2=Critical, but adaptable		3=Medium risk, less critical				4=Adaptable, less critical				5=Most challenging			
		Transportation and storage	Human health and social work activities	Public administration	Education	Financial and insurance activities	Real estate activities	Professional, scientific and technical activities	Information and communication	Agriculture, forestry and fishing	Industry and utilities	Construction	Administrative and support service activities	Trade and repair	Accommodation and food service activities	Arts, entertainment and recreation	Other service activities
WBT	Albania (2016)	2.6	3.1	4.9	5.0	1.0	0.0	1.1	1.3	40.2	12.8	6.6	2.4	11.0	5.1	1.1	2.0
	BiH (2016)	4.6	4.9	6.6	5.9	1.7	0.1	1.8	2.0	18.0	22.7	8.6	1.6	13.4	3.9	1.5	2.8
	Kosovo (2017)	2.7	6.5	6.1	9.5	1.7	0.1	2.2	2.6	4.4	17.4	12.9	3.9	14.7	6.6	1.4	7.5
	Montenegro (2019)	5.5	5.1	8.3	5.9	1.6	1.0	5.4	2.2	7.1	9.6	9.9	5.3	19.2	8.5	2.4	2.8
	North Macedonia (2019)	5.6	5.7	6.7	5.8	1.3	0.4	2.3	1.9	13.9	24.1	7.0	2.6	14.1	4.3	2.2	2.1
	Serbia (2019)	5.4	5.5	5.3	6.3	1.6	0.2	3.3	2.7	15.6	22.6	4.8	1.8	13.3	3.6	1.6	6.3
	Turkey (2019)	4.5	5.3	6.9	6.4	1.1	1.1	3.2	0.8	18.1	19.8	5.5	3.4	14.0	6.1	0.6	3.3
SEEU	Albania (2016)	2.6	3.1	4.9	5.0	1.0	0.0	1.1	1.3	40.2	12.8	6.6	2.4	11.0	5.1	1.1	2.0
	BiH (2016)	4.6	4.9	6.6	5.9	1.7	0.1	1.8	2.0	18.0	22.7	8.6	1.6	13.4	3.9	1.5	2.8
	Kosovo (2017)	2.7	6.5	6.1	9.5	1.7	0.1	2.2	2.6	4.4	17.4	12.9	3.9	14.7	6.6	1.4	7.5
SCEE	Armenia (2018)	4.8	5.4	9.2	11.3	1.6	0.3	1.8	2.3	25.2	13.8	4.4	0.5	12.0	2.7	1.9	3.1
	Azerbaijan (2018)	1.6	3.9	5.8	7.8	0.6	1.9	1.5	1.3	36.3	7.5	7.3	1.2	14.5	4.2	1.7	3.2
	Belarus (2019)	2.3	7.6	4.2	10.4	1.5	1.6	3.3	2.9	8.7	23.7	6.4	2.4	14.5	6.8	2.0	1.8
	Georgia (2019)	4.9	3.6	5.5	9.1	1.8	0.2	1.1	1.1	38.1	8.2	6.0	1.3	11.7	2.9	1.8	2.5
	Moldova (2016)	4.5	5.1	4.9	8.3	1.3	0.4	1.9	1.7	33.7	12.1	5.0	1.0	14.5	1.9	1.4	2.3
	Ukraine (2018)	6.1	6.1	5.7	8.7	1.3	1.6	2.7	1.7	18.0	14.8	4.1	1.9	22.3	1.7	1.2	2.2
CA	Kazakhstan (2019)	2.3	5.7	5.6	12.6	2.2	1.8	2.9	1.8	13.4	12.6	7.3	3.3	16.3	7.2	1.7	3.3
	Kyrgyzstan (2018)	8.2	4.1	4.1	9.0	1.5	0.4	1.1	1.2	20.3	14.4	10.4	1.0	15.7	6.0	0.7	1.9
	Tajikistan (2019)*	0.4	9.4	3.7	19.7	1.9	0.5	1.2	1.0	45.7	7.8	2.8	0.5	2.0	1.4	1.0	1.0
G&I	Greece (2019)	5.3	6.4	8.7	8.2	2.2	0.1	5.6	2.6	11.6	11.6	3.8	2.3	17.7	9.8	1.4	2.9
	Italy (2019)	4.9	8.2	5.3	6.8	2.7	0.7	6.5	2.6	3.9	20.1	5.7	4.4	14.1	6.3	1.4	6.3

Source: Author's estimations are based on: secondary data from Eurostat (Montenegro, North Macedonia, Serbia, Turkey, Bulgaria, Croatia, Romania, Greece and Italy; average of quarterly data in 2019); secondary data from national statistical agencies (Azerbaijan, Belarus, Georgia, Ukraine, Kazakhstan, Kyrgyzstan, and Tajikistan); and primary data from the individual-level Labour Force Survey (LFS) datasets (Albania, Bosnia and Herzegovina, Kosovo, Armenia, Moldova).

Note: *Data for Tajikistan concern formal sector employees (wage and salaried workers) based on statistical reporting by firms. Data for other countries concern employed people, regardless of employment status and formality (based on the LFS). There are no data for Turkmenistan and Uzbekistan. Definitions of clusters are provided in Table 1.

Table A-4. Outflows and net inflow of internationally mobile students in ECA countries, 2007 vs. 2017

Sub-region	Country	2007			2017		
		Outflows	Net flow	TOP-5 destinations	Outflows	Net flow	TOP-5 destinations
WBT	Albania	19,973	-	Italy, Greece, Turkey, France, United Kingdom	17,448	-	Italy, Greece, Turkey, Germany, United States
	Bosnia and Herzegovina	14,596	-	Serbia, Croatia, Austria, Turkey, Italy	13,089	-5814	Serbia, Austria, Croatia, Germany, Slovenia
	Montenegro	1,030	-	-	5,025	-	Serbia, Bosnia and Herzegovina, Italy, Turkey, Austria
	North Macedonia	6,647	-5763	Bulgaria, Turkey, Italy, Austria, Serbia	5,356	-	Turkey, Slovenia, Bulgaria, Italy, Germany
	Serbia	11,648	-425	Austria, Hungary, Italy, North Macedonia, France	15,393	-17,524	Austria, Hungary, Bosnia and Herzegovina, North Macedonia, United States
	Turkey	37,492	-	Azerbaijan, France, Austria, United Kingdom, Bulgaria	46,217	-	United States, Germany, United Kingdom, Austria, France
SEEU	Bulgaria	19,299	-10,199	France, Austria, Turkey, Italy, United Kingdom	25,094	-	Germany, United Kingdom, Netherlands, Turkey, Austria
	Croatia	8,827	-5,339	Italy, Austria, Slovenia, Serbia, United Kingdom	9,675	-	Bosnia and Herzegovina, Austria, Italy, United Kingdom, Slovenia
	Romania	20,952	-4,660	France, Hungary, Italy, United Kingdom, Austria	35,973	-3,769	Italy, United Kingdom, France, Germany, Denmark
SCEE	Armenia	4,011	732	Russian Federation, France, Greece, Poland, United Kingdom	5,890	-1,378	Russian Federation, France, Germany, United States, United Kingdom
	Azerbaijan	5,110	-824	Turkey, Russian Federation, France, United Kingdom, Georgia	42,771	-38,497	Turkey, Russian Federation, Ukraine, Georgia, Germany
	Belarus	14,116	-9,693	Russian Federation, Poland, France, Lithuania, Czechia	22,412	-4,842	Russian Federation, Poland, Lithuania, Germany, Czechia
	Georgia	7,194	-6,766	Russian Federation, Armenia, France, Greece, Turkey	11,340	-3,346	Ukraine, Germany, Russian Federation, Armenia, Turkey
	Moldova	10,057	-8,175	Romania, Russian Federation, Ukraine, France, Italy	18,170	-14,206	Romania, Russian Federation, Italy, Ukraine, Germany
	Ukraine	25,435	-31,911	Russian Federation, Poland, Hungary, France, Czechia	77,639	-34,387	Poland, Russian Federation, Germany, Czechia, Italy

Sub-region	Country	2007			2017		
		Outflows	Net flow	TOP-5 destinations	Outflows	Net flow	TOP-5 destinations
CA	Kazakhstan	29,546	-17,585	Russian Federation, Kyrgyzstan, United Kingdom, Turkey, Poland	84,681	-70,831	Russian Federation, Kyrgyzstan, Turkey, United States, Czechia
	Kyrgyzstan	4,080	23,125	Kazakhstan, Russian Federation, Turkey, Tajikistan, France	11,399	3,397	Russian Federation, Turkey, Kazakhstan, Germany, Saudi Arabia
	Tajikistan	3,254	-18,235	Russian Federation, Kyrgyzstan, Kazakhstan, Turkey, Saudi Arabia	19,762	61,859	Russia, Kyrgyzstan, Turkey, Belarus, Kazakhstan
	Turkmenistan	5,108	4,179	Turkey, Russian Federation, Ukraine, Kyrgyzstan, Kazakhstan	46,223	-24871	Russian Federation, Turkey, Belarus, Ukraine, Kazakhstan
	Uzbekistan	32,159	-	Kyrgyzstan, Russian Federation, Kazakhstan, Tajikistan, Republic of Korea	34,990	-	Russian Federation, Kazakhstan, Ukraine, Republic of Korea, Latvia

Source: UNESCO Institute for Statistics.

Note: Outflows = total outbound internationally mobile tertiary students studying abroad; Net flow=Net flow of internationally mobile students (inbound – outbound).

