
Indonesia Employment in 2023: Labor Force Conditions and Policy Developments in the Early Stages of the Demographic Bonus

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Abstract

In 2023, amidst the complexities of a volatile global economy, Indonesia demonstrated economic resilience, propelled by its dynamic workforce. This abstract synthesizes the intricate interplay between macroeconomic forces and employment trends within Indonesia, drawing from comprehensive data analyses and policy evaluations. The report encapsulates a year marked by economic recovery despite global headwinds such as the Russia-Ukraine conflict, inflation surges, and supply chain interruptions. With a predicted global growth of 3.6% by the IMF, Indonesia's economy experienced fluctuations but maintained a growth trajectory from Q2 2022 to Q2 2023. Labor force data indicates a predominance of the working-age population, signaling potential for sustained productivity and economic fortitude. The demographic composition, skewed towards a younger populace, underpins the vibrant labor market. Employment policies have been responsive to digitalization, globalization, and demographic transitions, focusing on skill development, vocational training, and job safety. Notably, vocational training for SMK graduates was prioritized to match industry requirements. Regulatory advancements aim to balance worker protections with corporate operational efficiency. Amidst COVID-19's lingering impact, policy adaptations were crucial to support workers and businesses, exemplifying Indonesia's agility in times of crisis. The landscape of employment disputes, predominantly centered around termination, underscores the necessity for robust conflict resolution mechanisms. With 71.15% of industrial disputes tied to terminations, mediation emerged as the preferred dispute resolution strategy. Regional data unveiled disparities in job placements and complaints, spotlighting the need for equitable workforce distribution and grievance redressal mechanisms. The report concludes that Indonesia's labor policies and employment conditions are dynamically evolving, poised to sculpt a robust, inclusive, and sustainable labor market landscape.

Keywords: indonesia employment report, labor force, working-age population, employment policy, vocational training, migrant worker, job portal

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1. Macro-Economic and Employment Developments in 2023

In 2023, Indonesia witnessed an economic resurgence amidst the challenges of a precarious global economic environment. Contributing factors included the ongoing Russia-Ukraine conflict, soaring inflation rates, and persistent supply chain disruptions. The International Monetary Fund (IMF) reports that global economic growth in 2023 is anticipated to be 3.6%, a slight decrease from the earlier forecast of 3.7%. This growth projection falls short of the 6.1% global economic expansion in 2022.

The conflict between Russia and Ukraine has significantly contributed to the deceleration of global economic momentum. This confrontation has caused considerable disturbances in international commerce and the energy sector, triggering spikes in prices. Indonesia's manner of navigating these global adversities is indicative of its robustness and strategic adaptability to the fluctuating dynamics of the global economic landscape.

Employment is intrinsically connected to economic progress in Indonesia. The availability of a high-caliber workforce can hasten the nation's developmental strides, positioning Indonesia to vie competitively on the global stage.

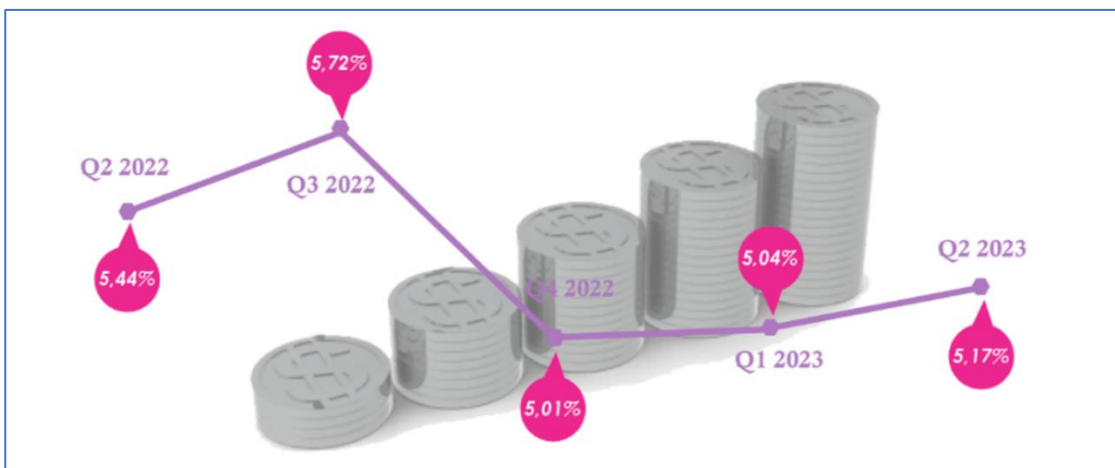


Figure 1. Economic Growth of Indonesia Q2 2022-Q2 2023
 Source: Bank of Indonesia (2023), processed by Pusbangjknaker (2023)

The provided graph (Figure 1) delineates Indonesia's economic growth trajectory from Q2 2022 to Q2 2023, exhibiting a variable trend across the depicted quarters. In the second quarter of 2022, the economy expanded by 5.44%, followed by an increase to 5.72% in Q3 2022, suggesting an augmentation in economic vigor. Subsequently, a contraction occurred in Q4 2022, with the growth decelerating to 5.01%. This downtrend persisted marginally into Q1 2023, with a slight reduction in the growth rate to 5.04%. A resurgence was observed in Q2 2023, where the economic growth improved to 5.17%. Despite the fluctuations, the overall portrayal from the graph is one of persistent economic expansion throughout the year. The data illustrated is sourced from the

Bank of Indonesia (2023) and has been analyzed by Pusbangjknaker (2023), as acknowledged in the figure.

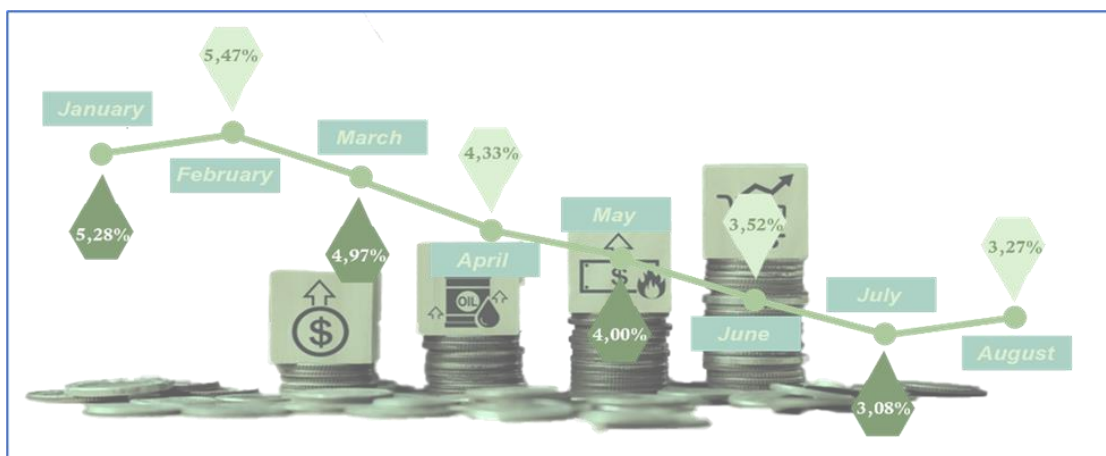


Figure 2. Percentage of Inflation Rate in 2023

Source: Bank of Indonesia (2023), processed by Pusbangjknaker (2023)

The provided graph in Figure 2 illustrates the trajectory of economic growth on a monthly basis, spanning from January to August of a given year. The line graph exhibits fluctuating growth rates over these eight months. The year began with a growth rate of 5.28% in January, a slight increase to 5.47% in February. However, in March, the growth rate experienced a decline, falling to 4.97%. The downturn continued into April when the rate decreased to 4.33%.

A rebound occurred in May, with the growth rate climbing to 4.00%. Unfortunately, this recovery was short-lived, as the following month, June, marked a decrease to 3.52%. The declining pattern persisted into July, with a growth rate of 3.27%, and the graph concludes in August with the growth rate dipping to its lowest point in the sequence at 3.08%. This visual representation indicates that the economic growth experienced a downward trend in the latter half of the observed period, suggesting a period of economic deceleration.

Figure 3 illustrates the labor absorption from foreign direct investment (PMA) and domestic direct investment (PMDN) in Indonesia, spanning from the second quarter of 2022 to the second quarter of 2023. In Q2 2022, we see a total worker absorption of 320,534, with 139,582 from PMA and 180,952 from PMDN. The following quarter, Q3 2022, shows a slight increase in total absorption to 325,575, with PMA contributing 142,444 and PMDN 183,131. Q4 2022 presents a notable rise in overall labor absorption to 339,879. PMA's share is 134,952, while PMDN's is 204,927. This upward trend continues into Q1 2023, where the total absorption reaches 384,892, consisting of 165,797 from PMA and a significant increase from PMDN at 219,095.

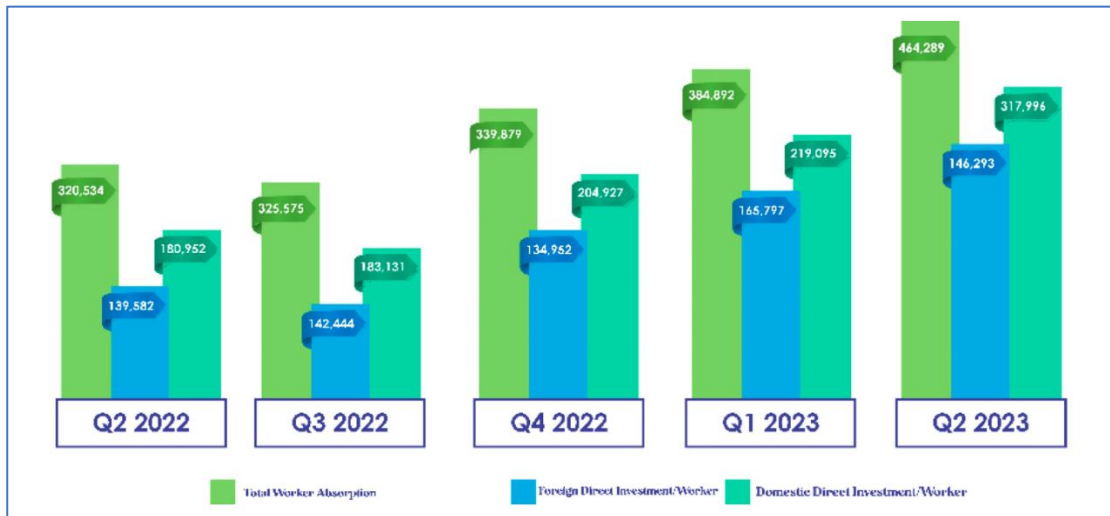


Figure 3. Labor from PMA and PMDN Intake Investment in Indonesia (Quarter II of 2022-Quarter II of 2023)

Source: Katadata (2023), processed by Pusbangjknaker (2023)

The trend peaks in Q2 2023, with the highest worker absorption observed at 464,289. The PMA component is 146,293, whereas the PMDN component substantially climbs to 317,996, indicating robust domestic investment activity during this period.

2. Population, Working-Age Population, and Labor Force

Amidst the dynamics of Indonesia's development as an emerging country, demographic aspects always receive significant attention. In the context of population, important terms that need to be understood, such as the working-age population, labor force, and those not in the labor force.

The working-age population refers to residents generally considered capable of entering the labor market, namely those aged 15 and above. On the other hand, the labor force is the working-age population actively involved in economic activities, either as employed workers or as unemployed. Meanwhile, those not in the labor force are the working-age population who are not included in the labor force, usually because they are still in school, taking care of the household, or for other reasons.

In 2022, the population pyramid of Indonesia (see Figure 4) was classified as expansive, which means that the bottom part of the pyramid (younger age) has a larger population compared to the top part (older age). This indicates that the Indonesian population is still predominantly young, with relatively high birth and death rates, and the population growth is considered high. Regarding gender, the male population in Indonesia reached 139.39 million, and the female population was 136.38 million.

The productive-age population (ages 15-64) amounted to 190,977,917 people, or about 69.25% of the total Indonesian population in 2022. Meanwhile, those in the young labor force category (ages 15-24) totaled 44,653,956 people, or approximately 16.19% of the total Indonesian population for the year 2022.

Notably, the working-age population, defined as those aged 15 to 64, encompasses most of the demographic distribution. For males, the percentage within this range begins at 4.3% for the 15-19 age group, incrementally rising to a peak at ages 25-29 with 4.2%, and then gradually declining to 2.5% for the 60-64 age group. Similarly, for females, the 15-19 age group starts at 4.0%, peaking at 4.0% for ages 25-29 and then decreasing to 2.5% for the 60-64 age group.

Overall, these percentages suggest a significant concentration of the population within the working-age bracket, indicating a substantial base for the workforce. The relatively even distribution across the various age groups within this segment points towards a potential for sustained economic productivity and support for a demographic dividend, given the large proportion of the population in their productive years.

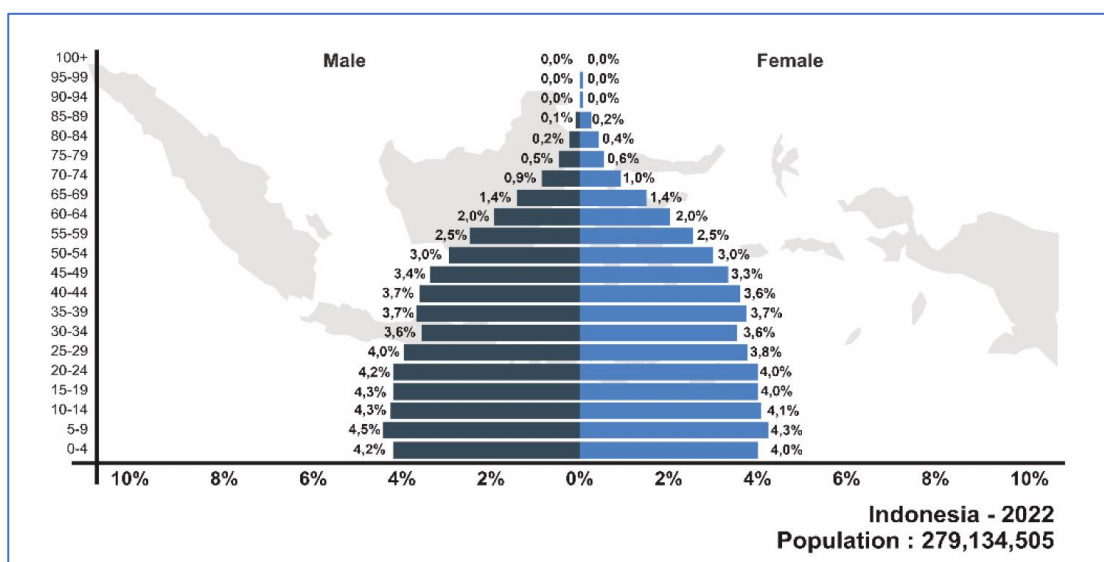


Figure 4. Demographic Structure of Indonesia 2022

Source: BPS (2023), processed by Pusbangjknaker (2023)

Figure 5 illustrates the distribution of Indonesia’s population across three categories: working-age population, labor force, and those not in the labor force, over three consecutive Augusts from 2021 to 2023.

In August 2021, the working-age population was recorded at 206.71 million individuals, representing 67.80% of the population. During the same period, the labor force was 140.15 million, accounting for 32.20% of the population. Those not in the labor force stood at 65.66 million, making up the remaining percentage.



Figure 5. Working-age Population, Labor Force, and Non-Labor Force
 Source: BPS (2023), processed by Pusbangjknaker (2023)

By August 2022, the working-age population slightly increased to 209.42 million, making up 68.63% of the population. Correspondingly, the labor force increased to 143.72 million individuals, representing 31.37% of the population. Those not in the labor force also rose slightly to 65.70 million.

In August 2023, the trend continued, with the working-age population reaching 212.59 million, constituting 69.48% of the population. The labor force increased to 147.71 million people, while those not in the labor force marginally decreased to 64.88 million, or 30.52% of the population. The data indicate steady growth in the working-age population and labor force in Indonesia over the past three years, with a slight decrease in the proportion of those not in the labor force in 2023.

Figure 6 displays the Labor Force of Indonesia by the highest level of education attained from 2021 to 2023. In 2021, the population with an elementary school education level or below was the highest, at approximately 49.03 million people, or 37.41% of the total population. This was followed by those with junior high school education at about 24.29 million people (18.53%), senior high school at 18.64 million people (14.23%), vocational high school at 18.06 million people (13.79%), diploma at 16.16 million people (12.33%), and university at 10.59 million people (8.08%).

In 2022, the number of people with elementary education or below decreased to around 52.51 million, or 38.81% of the total population. For junior high school, the number increased to 23.72 million people (17.53%), senior high school increased to 26.42 million people (19.53%), and vocational high school decreased to 15.98 million people (11.81%). The population with a diploma increased to 18.31 million people (13.53%), and university increased to 13.36 million people (9.87%).

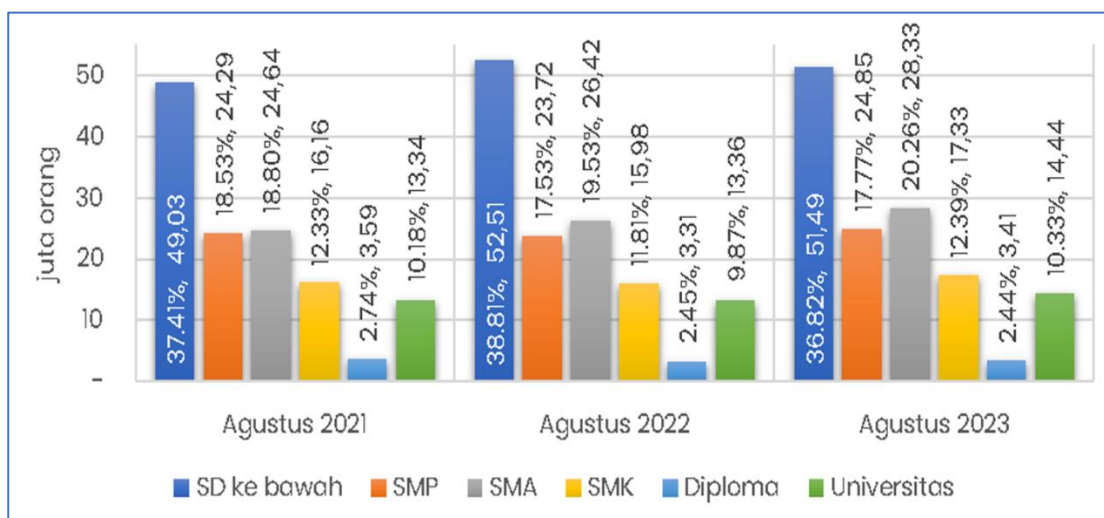


Figure 6. Labor Force by Education Level

Source: BPS (2023), processed by Pusbangjknaker (2023)

By 2023, the number of people with elementary education or below further decreased to approximately 48.5 million, or 34.26% of the total population. For junior high school, the number became 24.85 million people (17.77%), senior high school increased to 24.48 million people (17.77%), and vocational high school decreased to 17.33 million people (12.39%). Meanwhile, the number of people with a diploma was 17.33 million (12.39%), and university rose to 14.44 million people (10.33%).

Overall, the number of people with elementary and vocational high school education decreased, while the number of people with senior high school, diploma, and university education tended to increase year over year. Full-time workers stand at 92.16 million, comprising 66.48% of the total working population. This reflects an increase of 3.74 million from February 2022.

There are 46.46 million part-time workers, which is 33.52% of the working population. Of these, females comprise a significant portion, with 24.16 million part-time workers, representing 52 percentage points. Most part-time workers have an educational level of primary school or below, at 23.66 million people, or roughly 50.93% of part-time workers. The group with the fewest part-time workers includes those with diplomas or higher education (diploma I/II/III, academy, university), totaling 3.71 million, or about 7.99% of this sector.

A significant majority, 79.37%, of part-time workers are fully employed, while the semi-employed constitute approximately 20.63% of this workforce. Female part-time workers predominate at 20.61 million, or 55.89% of the sector. In terms of education, those with at most a primary school education remain the majority of part-time workers, totaling 19.38 million, or around 52.55%. Meanwhile, those with higher educational levels (diploma I/II/III, academy, university) are the least numerous, at 3.01 million, representing about 8.18%.

The proportion of part-time workers in Indonesia as of February 2023 is 26.61%, signifying that of every 100 working-age individuals, approximately 27 are part-time workers. Semi-unemployed individuals number 9.5 million, accounting for 20.63% of part-time workers, with males making up 62.93% of this group. Those with an education level of primary school or below dominate among the semi-employed, with 4.28 million people, or 44.67% of the semi-employed category. The semi-unemployment rate is 6.91%, indicating that there are about seven semi-unemployed individuals for every 100 working-age persons.

Most of Indonesia's workforce is engaged in informal activities, with 83.34 million people, or about 60.12% of all workers, predominantly men (57.33%) and those living in rural areas (55.88%). Conversely, formal workers number 55.28 million, or 39.88% of the workforce, again with men in the majority at 65.90%, and most are in urban areas, at 69.11%.

The unemployment figure is 7.98 million, with men forming the more significant part of this group, 5.21 million, or 65.24%. This is a decrease of 0.41 million, or about 4.88%, from February 2022. The highest educational level among the unemployed is predominantly high school (SMA-SMK), with 3.88 million individuals, or 48.60% of the unemployed. The largest demographic within the unemployed population is those with a high school education, about 2.2 million people or 27.74%.

In February 2023, the unemployment rate dropped by 0.38 percentage points from the previous year to 5.45%. This indicates about five unemployed individuals for every 100 working-age people. The unemployment rate for men is 5.83%, higher than the 4.86% for women. The urban unemployment rate is significantly higher at 7.11%, compared to 3.42% in rural areas. The highest unemployment, at 16.46%, is among youth (15–24 years), while the lowest, at 1.13%, is among the elderly (60 years and above).

The youth labor force is mainly male, 12.93 million or 60.48%, with females constituting 39.52%. The most significant proportion of young workers has completed high school, representing 56.97% or about 12.18 million of the young labor force as of February 2023.

3. Development of Employment Policies

The development of employment policies globally and in Indonesia has been a particular focus in recent years, especially in light of challenges posed by digitalization, globalization, and demographic changes.

In Indonesia, employment policies continue to evolve to align with economic shifts and labor market dynamics. These policies encompass various aspects such as skill development, vocational training, workplace safety, unemployment, and working conditions.

One area that has received significant attention is vocational training. With an increasing demand for skilled labor in a knowledge-based economy, the Indonesian government has ramped

up investment in vocational education and training. For example, the introduction of Community Vocational Training Centers (BLK Komunitas) aims to enhance skills relevant to the industry.

Vocational education, particularly for graduates of Vocational High Schools (SMK), is prioritized to ensure that graduates are job-ready and can meet industry demands. The government also striving to strengthen the relationship between vocational training centers and the industrial sector, to ensure training curricula align with market needs.

On the regulatory side, Indonesia's employment policies are continually being refined, including regulations on foreign labor, employment contracts, and social security systems for workers. The government seeks to balance protecting workers' rights while providing flexibility for companies to operate efficiently.

Furthermore, with growing awareness of social justice and inclusion, there is a push to develop more inclusive policies that support women, young workers, and other vulnerable groups.

Recent developments in employment policy also include handling the COVID-19 pandemic, which has necessitated policy adjustments to support workers and businesses during the crisis. This includes wage subsidies, social assistance programs, and incentives for companies to retain employees.

Overall, the progression of employment policies in Indonesia demonstrates a dynamic response to changing economic and social environments to create a strong, inclusive, and sustainable labor market.

3.1. Development of Employment Policies in the Field of Vocational Training and Productivity

The Community Vocational Training Center (BLK Komunitas) is a vocational training entity situated within non-government religious education institutions such as Islamic boarding schools (pondok pesantren), seminaries, dhammasekha, pasraman, and other non-government religious institutions. It also encompasses communities within workers' unions (SP/SB) distributed across Indonesia. As of October 2023, there are 525 such institutions nationwide.

Data from the Ministry of Manpower indicates that Community Vocational Training Centers (BLK Komunitas) outnumber other vocational training entities. The 3,091 centers constitute approximately 57.35% of all vocational training institutions as of the first semester of 2023. Lampung Province hosts the most significant number of these centers, totaling 101. In addition to the Community Vocational Training Centers, Lampung Province also leads in the number of Private Training Institutions (LPK Swasta), with a total of 116, making it the province with the highest count of such private institutions.

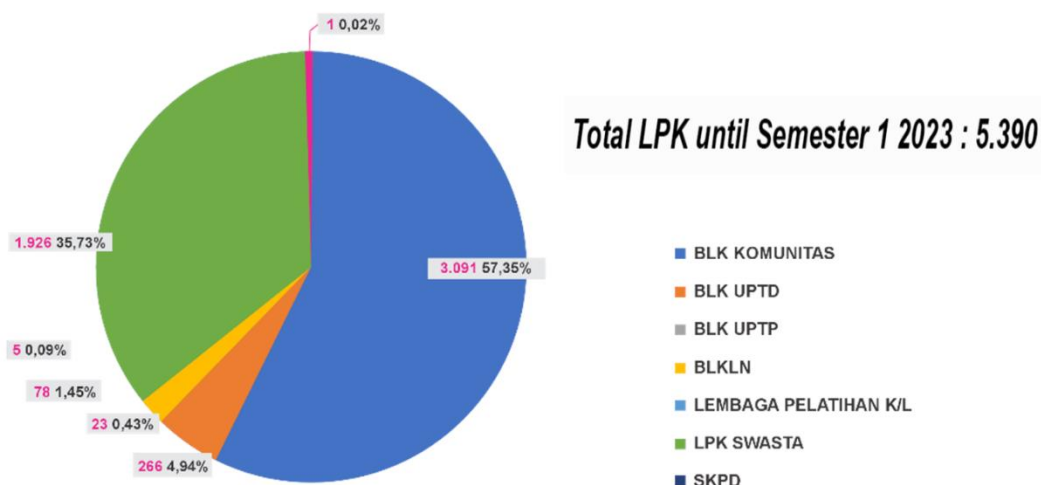


Figure 7. Number of Job Training Institutions by Institution Type until Semester I 2023
 Source: satudata.kemnaker.go.id (2023), processed by Pusdatik Kemnaker (2023)

Based on educational attainment, graduates of Vocational High Schools (SMK) represent the largest group of vocational training participants, having attended 9,026 training sessions tailored explicitly for SMK graduates, which is about 20.46% of the total vocational training carried out from January to November 2023. Vocational training for those with an SMK education level is frequently held at Regional Technical Implementation Unit Training Centers (BLK UPTD), with 5,267 sessions conducted.

3.2. Employment Termination Continues to Be the Primary Cause of Disputes

The workforce in Indonesia is still feeling the ramifications of the COVID-19 pandemic. Notably, the most prevalent type of industrial relations dispute in the country pertains to layoffs or employment termination (PHK). Mass layoffs have become a particularly troubling trend, reshaping global economic conditions.

In Indonesia, employment termination (PHK) remains a multifaceted challenge for workers. PHK can lead to economic strife and psychological distress and, in some cases, may even contribute to an increase in criminal activities. The impact of PHK extends beyond the affected employees; it can also adversely influence a company's health, leading to decreased sales turnover and reduced business productivity due to employee shortages.

From January to September 2023, 6,640 cases of industrial relations disputes were reported, with the majority, 4,724 cases (71.15%), associated with employment termination disputes. The preferred approach for resolving these disputes was mediation, with 5,915 cases handled this way.

During the same period, West Java recorded the highest number of layoffs, with 73,320 individuals, or 38.24% of the total laid-off workers. The most significant layoffs occurred in September 2023, amounting to 42,277 people.

3.3. Job Vacancies at Karirhub

The Ministry of Manpower is committed to developing a digital ecosystem to improve labor services, including SIAPkerja, which features Karirhub. Karirhub is a labor service platform that provides job vacancy information and streamlines the connection between employers and job seekers in Indonesia and internationally.

Karirhub assists employers and job seekers in finding suitable job matches, ensuring job positions are filled with candidates who have the appropriate skills. This approach leads to more effective recruitment outcomes for all parties involved. Karirhub is also integrated with additional services like training and certification, helping workers to upgrade their skills and gain professional qualifications.

From January to October 2023, job vacancies specifying gender preferences remain the majority, with about 62.86% or 231,485 vacancies indicating a preference for either male or female candidates. Vacancies for male candidates constitute 11.43%, totaling 31,923, whereas those for female candidates represent 5.71% of the total listed on Karirhub.

West Java Province has the largest share of job vacancies, with approximately 131,152 or 46.95% of the total listed on Karirhub, including 5.35% for males, 2.31% for females, and 92.35% for unspecified gender vacancies in the province from January to October 2023 timeframe.

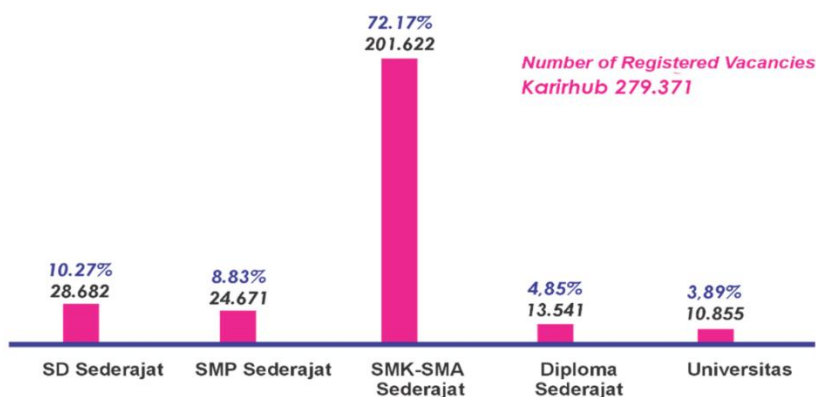


Figure 8. Number of Job Vacancies Registered on Karirhub According to Education Level Group (January-October 2023)

Source: Karirhub Kemnaker (2023), processed by Pusbangjknaker (2023)

Regarding educational requirements, vacancies are mainly aimed at Vocational High School (SMK) graduates, approximately 180,792 or 64.71% of the total. The most significant proportion

of SMK vacancies is in West Java Province, with 43.06% of the total. Doctoral-level positions have the fewest vacancies, with just 52 (0.02%).

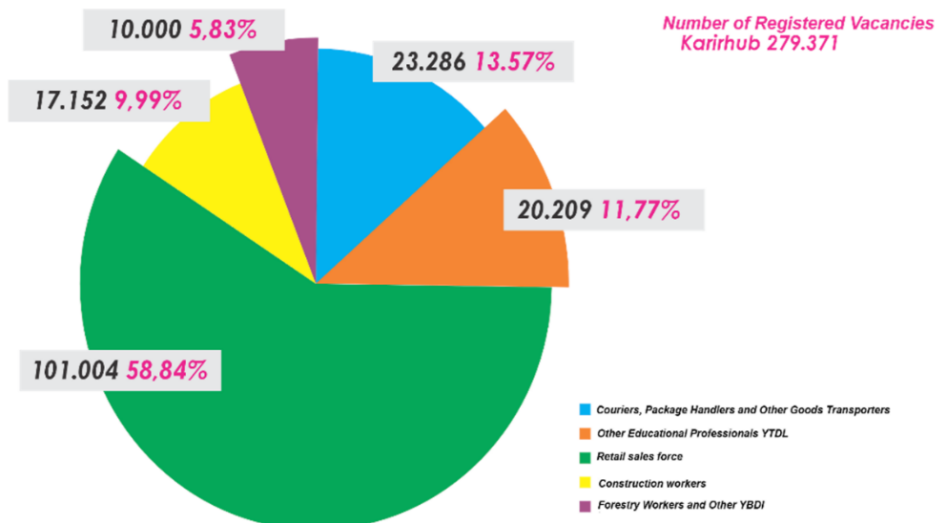


Figure 9. Number of Registered Job Vacancies on Karirhub by Type of Job/Position (January to October 2023)

Source: Karirhub Kemnaker (2023), processed by Pusbangiaknaker (2023)

In the educational category, high school and vocational school (SMA-SMK equivalent) graduates have the most vacancies, totaling 201,622 or 72.17% of all listed on Karirhub from January to October 2023. University graduate vacancies are the fewest in comparison.

Regarding job roles, Retail Sales Agents lead with 101,004 vacancies or 58.84% of the total available positions on Karirhub from January to October 2023. There are also Courier, Package Delivery, and Freight Handler positions, accounting for 13.57% of vacancies, followed by professional roles in various educational fields (YTDL) at 11.77%, Construction Laborers at 9.99%, and Forestry Workers and other YBDI roles at 5.83%.

Male job applicants predominate, representing 60,829 or approximately 60.30% of the total for January to October 2023. The highest number of applicants hail from West Java Province, about 34.77% of the total.

Regarding applicants' educational levels, those with a Vocational School (SMK) background are the largest group on Karirhub from January to October 2023, constituting 27.85% of applicants. Bachelor's degree (Si) holders are the second-largest group, comprising 25.43% of the total.

3.4. Placements for Indonesian Migrant Workers (PMI)

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From January to September 2023, 1.06 million job vacancies were reported across 16 countries. Most of these positions, amounting to 722,410 or 67.79%, were designated specifically for female candidates, while vacancies without specified gender requirements constituted 6.75%.

Taiwan had the highest job vacancies during this period, offering 758,109 positions, 71.10% of all vacancies. Malaysia followed with 12.00% of the openings, Hong Kong Special Administrative Region of China with 10.70%, Singapore with 3.47%, and Turkey with 0.46%. Between January and August 2023, a total of 135.79 thousand Indonesian Migrant Workers (PMI) were placed in various regions, with a significant portion, 106,192 workers or about 55.52%, coming from the formal sector. The most considerable number of PMI from the formal sector were from West Nusa Tenggara Province, totaling 23,541 workers.

As per the origin of the Indonesian Migrant Workers (PMI), East Java Province had the highest number, with 47,590 PMI, or roughly 24.88% of the total place from January to September 2023. Looking at the destination countries from January to October 2023, the most Indonesian Migrant Workers were placed in Taiwan, with 70,057 workers or 29.44% of the total. This was followed by placements in Malaysia with 63,540 PMI or 26.70%, and Hong Kong with 60,872 PMI or 25.58%.

Regarding job roles, the majority of Indonesian Migrant Workers are employed as housemaids, totaling 61,180 PMI or 25.71% of those placed. The lowest number of workers is in the role of Upholsterer, with just 173 placements or 0.07%.

Complaints from Indonesian Migrant Workers based on the country of placement are most numerous in Saudi Arabia, with 444 cases or approximately 24.82% of total complaints, followed by Taiwan and Malaysia with 338 and 331 complaints, respectively. The countries with the fewest complaints are France and Brazil, each with just 0.06% of complaints during that timeframe.

Finally, based on the origin province within Indonesia, the most complaints come from PMI originating from West Java, with a total of 576 complaints, which is about 32.20% of all recorded complaints.

3.5. Provincial Minimum Wage 2023-2024

According to the Central Statistics Agency (BPS) data from February 2023, the national average salary for workers/employees is IDR 2.94 million per month. By sector, workers in the

real estate sector earn the highest average salary at IDR 4.82 million per month, followed by those in the financial and insurance services sector at IDR 4.81 million per month, and the mining and quarrying sector at IDR 4.59 million per month. The lowest average national salary is in the other services sector, at IDR 1.79 million per month.

The data for 2023 shows that West Sumatra Province witnessed the most substantial rise in the Provincial Minimum Wage (UMP), a 9.15% increase from IDR 2,512,539 in 2022 to IDR 2,742,476 in 2023. Conversely, West Papua Province saw the smallest UMP increase, only 2.56%, from IDR 3,200,000 in 2022 to IDR 3,282,000 in 2023. Jakarta Province maintains the highest UMP at IDR 4.90 million per month, with an average salary of IDR 5.07 million per month. Central Java Province has the lowest UMP at IDR 1.95 million per month, coupled with an average salary of IDR 2,178,167.

In Yogyakarta, the UMP increased from IDR 1,981,782 in 2023 to IDR 2,125,897 in 2024. The most modest UMP growth occurred in Gorontalo Province, at 1.19%, from IDR 2,989,350 in 2023 to IDR 3,025,100 in 2024. Jakarta continues to have the highest UMP at IDR 5.06 million per month, while Central Java remains at the bottom with the lowest UMP at IDR 2.03 million per month.

3.6. Number of Active Participants in Social Security for Non-Wage Workers

Between January and September 2023, the total number of active enrollees in Indonesia's social security program for non-wage workers, which includes the Work Accident Insurance (JKK) and Death Insurance (JKM) schemes, reached 7.28 million individuals. The Old Age Security (JHT) program recorded 558,444 participants during the same period.

DKI Jakarta leads as the province with the highest number of active participants in the social security program for non-wage workers within the aforementioned timeframe, accounting for 6,996,898 individuals or 17.39% of the overall active participants. Out of these, 884,199 people, or 12.14% of the total active participants, are enrolled in the Work Accident Insurance (JKK) and Death Insurance (JKM) programs. Additionally, the Death Insurance (JKM) program alone comprises 126,245 individuals, which is 22.61% of the total active participants.

In terms of gender distribution during the same period, the social security program for non-wage workers is predominantly joined by male participants, with a count of 28.83 million or 71.64% of the total number of active participants.

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