

LABOUR MIGRATION IN ASIA: WHAT DOES THE FUTURE HOLD?

MARCH 2023

Written by

**ECONOMIST
IMPACT**

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ACRONYMS

ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
DESA	United Nations Department of Economic and Social Affairs
GDP	gross domestic product
ICT	information and communications technology
ILO	International Labour Organization
IOM	International Organization for Migration
KNOMAD	Global Knowledge Partnership on Migration and Development
MOEL	Ministry of Employment and Labor (Republic of Korea)
MoU	memorandum of understanding
OECD	Organisation for Economic Co-operation and Development
SSW	Specified Skilled Workers (programme of the Government of Japan)

EXECUTIVE SUMMARY

Asia's economic and demographic diversity catalyses dynamic and varied migration patterns, creating mutual benefits for sending and receiving countries. Countries with ageing populations can tap into labour surpluses elsewhere, while migrants and their families back home can lead more economically secure lives through transfers of remittances and skills. With 86 million, Asia hosts around one third of the global international migrant population.¹ Making sense of the future of labour migration is indispensable for migration stakeholders' efforts to effect change – and work towards the ultimate goal of ensuring safe, orderly and regular migration.

This report is the second part of a two-phase research programme, The Future of Labour Migration in Asia, commissioned to Economist Impact by IOM. The first report, *Spotlight on Labour Migration in Asia*,² focused on the historical and current dynamics of lower-skilled labour migration, and this second one explores the future. While the first report identified leading drivers of lower-skilled labour migration in Asia, the current one leverages primary and secondary evidence to analyse these drivers through the lens of 10 case studies and formulate an outlook for lower-skilled labour migration. These drivers include income differentials between countries; demographic shifts, with a focus on ageing; economic transformation and infrastructure development; technological shifts and automation in the workplace; and climate change. The report concludes with recommendations for policymakers and businesses to address gaps in current migration systems.

Table 1. Country case studies and represented migration drivers

Migration driver	Country case study
Demographic shifts	<ul style="list-style-type: none">• Japan• Republic of Korea
Climate change	<ul style="list-style-type: none">• Bangladesh• Cambodia
Technology and automation	<ul style="list-style-type: none">• Malaysia• Singapore
Economic transformation and infrastructure development	<ul style="list-style-type: none">• Thailand• Malaysia
Income differentials	<ul style="list-style-type: none">• Philippines• Bangladesh

¹ IOM, *World Migration Report 2022* (Geneva, 2021). Available at <https://publications.iom.int/books/world-migration-report-2022>.

² Economist Impact, *Spotlight on Labour Migration in Asia: A Factor Analysis Study* (Geneva, IOM, 2021). Available at <https://publications.iom.int/books/spotlight-labour-migration-asia>.

KEY FINDINGS

- **Lower-skilled labour migration will remain prevalent in Asia over the next decade.** Differences in earning potential and job opportunities between origin and destination countries – the economic conditions that spur migration for employment and better life quality – are not expected to see significant shifts over the next decade. However, migration levels in individual corridors may fluctuate with the interplay of drivers simultaneously. The actual impact on migration levels will be determined by the relative force of each driver. For example, while the prospect of higher incomes may create a pulling impact for migrant workers towards a destination country, the use of automation in workplaces may create a pushing impact if upskilling opportunities for workers are unavailable.
- **Demographic shifts will influence migration policies in Asia over the next decade.** The effects of this trend will play out in two main ways. First, care-related jobs will see significant growth. Second, pragmatic concerns around growing old-age dependency ratios and labour shortages will mean that ageing countries, such as Japan and the Republic of Korea, will potentially pursue more open migration policies, including, for example, expanding the scope of work sectors accessible to migrant workers. However, such policies will continue to be characterized by the admission of migrant workers on a labour demand basis. Countries at mature ageing stages may also begin to receive migrants from a more diversified pool of origin countries, as newly ageing countries like China and Viet Nam may prioritize local labour demand.
- **Climate change will become a more conspicuous labour migration driver in the coming decade as climate vulnerability intensifies in major portions of South and South-East Asia.** This driver will also manifest in greater internal migration from primary activity-heavy rural and coastal areas to urban areas. In some existing international corridors, such as Cambodia–Thailand, the effects of climate change will interact more strongly with economic incentives to fuel labour migration.
- **Growing adoption of technology and automation in the workplace in destination countries may require migrants to upskill or reskill to keep pace.** While growing automation may alter the nature of supply and demand for particular skills, it may not significantly lessen the migration of lower-skilled workers over the next decade. Lower-skilled migrant workers in routine, manually intensive jobs will face potential job losses, unless provided with intensive skilling opportunities. The technological transition will be relatively easier for medium-skilled workers. Information and communication technology (ICT), and cognitive and social skills will be in high demand.
- **Migrant workers will continue to play a vital role in the economic transformation journeys of upper-middle-income countries.** The ongoing economic transformation of upper-middle-income countries, such as Thailand, towards becoming high-income, high-value economies will continue to fuel demand for lower-skilled migrant workers over the next decade. The accompanying infrastructure development will be an added driver of migration as these countries currently rely heavily on migrant workers in sectors supporting infrastructure development, including construction and manufacturing.

- **The outlook for labour migration presents both risks and opportunities for women migrant workers.** Income differentials are a more pronounced push factor for women migrant workers facing a gender-based pay gap in favour of men in their countries of origin. This trend is likely to endure in the next decade. Given that these workers are concentrated in occupations at relatively higher risk of automation-induced displacement (e.g. the garment, textile and footwear industries in South-East Asia), upskilling initiatives and investments will need to emphasize their participation. At the same time, women migrant workers may find opportunities in the expanding caregiving sector in ageing countries, which is also feminized, but considered as informal employment in many countries. This, in turn, leaves women workers, especially domestic workers, partially or fully excluded in labour laws and regulations. Governments and businesses would need to consider the gendered impacts of migration drivers when designing policies and initiatives.
- **The outlook for the migration drivers and the case studies illuminate key future areas of focus for policymakers and businesses.** These include provisions for skill recognition for migrant workers, mainstreaming migration as an adaptation strategy in relevant policy frameworks for climate change, preparing migrant workers for the future of work, and strengthening inclusion in social security, physical health and psychosocial support services.

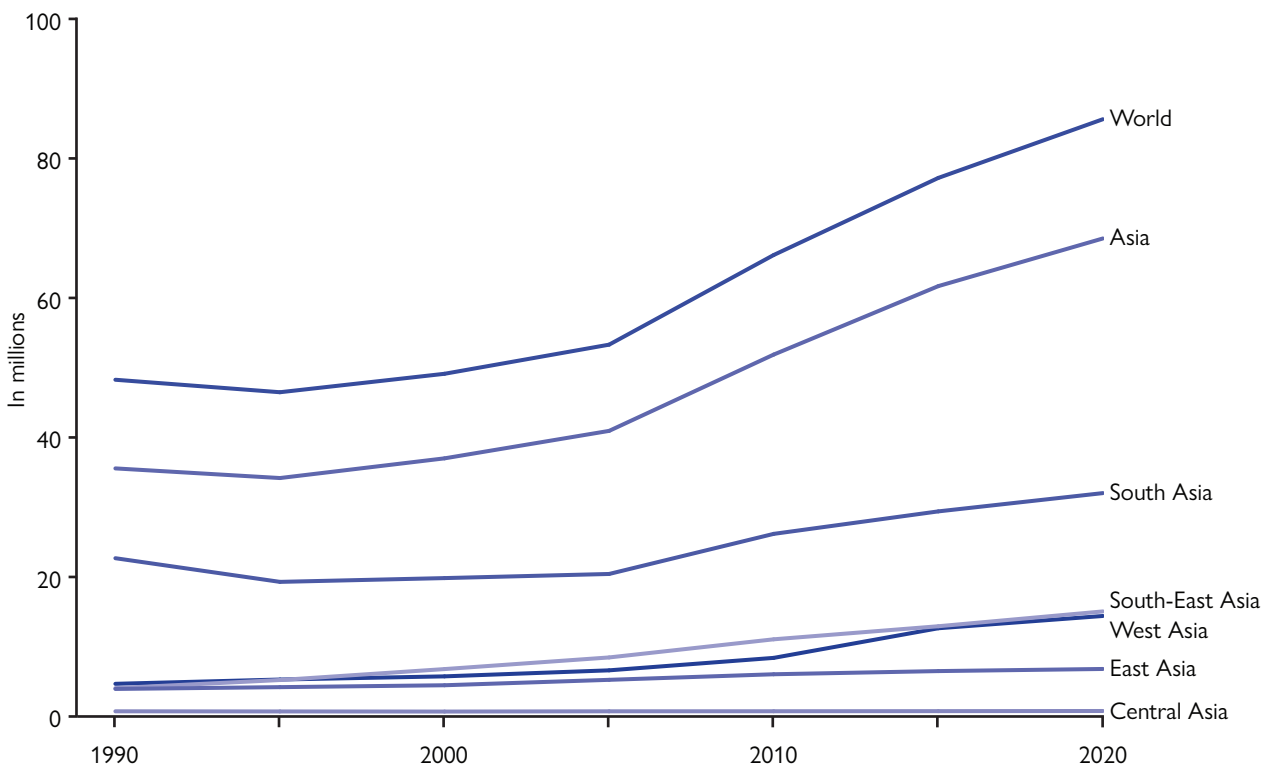
INTRODUCTION

Migration not only contributes to the efficient and productive use of labour and human capital, but also catalyses the transfer of knowledge and skills, benefiting both origin and destination countries. Current migration patterns and trends in Asia have been evolving. Over the last three decades (1990–2020), Asia has seen a 93-per-cent increase in its intraregional migrant population (from 35.5 million to 68.5 million). In 2020, Asia received 85.6 million migrants, of which 80 per cent (68.5 million) came from the continent itself. The rise in intraregional movement is most evident in South-East and West Asia over the same period, when there was a 280-per-cent increase in migrant movements within South-East Asia and a 214-per-cent increase within West Asia. Similarly, there has been a 75-per-cent and 41-per-cent increase in the movement of East Asian and South Asian migrants, respectively, to other parts of Asia.³ Migration for employment is the dominant form of migration in the Asia–Pacific region. Based on 2019 figures,

migrant workers represented 62 per cent of all international migrants worldwide, of which 14.2 per cent (or 24 million) were hosted in the Asia–Pacific region. Following a period of stagnation during the COVID-19 pandemic, the latest labour mobility trends showed a gradual resumption in the inflow and, thus, an increase in the stock of migrant workers in major destination countries in the region in 2021.⁴

What drives these current and future patterns? The report, *Spotlight on Labour Migration in Asia* report identified seven key drivers of lower-skilled labour migration: income differentials between countries; demographic shifts; economic transformation and infrastructure development; technological shifts and automation in the workplace; climate change; government policies on labour migration; and new forms of recruitment and work.⁵

Figure 1. Number of migrants arriving in Asia, 1990–2020



Source: United Nations Department of Economic and Social Affairs (DESA) – Population Division, “International migrant stock 2020”, data set (2020). Available at www.un.org/development/desa/pd/content/international-migrant-stock.

³ DESA Population Division, “International migrant stock 2020”, data set (2020). Available at www.un.org/development/desa/pd/content/international-migrant-stock (accessed 15 October 2022).

⁴ IOM, *Asia-Pacific Migration Data Report 2021* (Bangkok, IOM Asia-Pacific Regional Data Hub, 2022). Available at <https://publications.iom.int/books/asia-pacific-migration-data-report-2021>.

⁵ Economist Impact, *Spotlight on Labour Migration in Asia* (see footnote 2).

Insights into the impact of these trends on regional migration patterns are needed to aid effective labour migration governance and multi-stakeholder coordination, further underscored by the perilous impact of COVID-19 on migrant workers. The COVID-19 pandemic has further magnified governance gaps. Reporting by the International Labour Organization (ILO) shows that the pandemic disrupted labour markets at a “historically unprecedented” scale, recording losses equivalent to 8.8 per cent of global working hours or 255 million full-time jobs.⁶ The report further points to a need for a more accommodating macroeconomic policy for income support and investment, particularly for vulnerable groups, including lower-skilled workers; policy measures to support labour markets during transitional periods; and policies encouraging social dialogue with employers and workers.⁷

This report, produced by Economist Impact with support from IOM, is a part of IOM efforts to understand the impact of drivers in the next decade identified in the *Spotlight on Labour Migration in Asia* report and provide forward-looking policy recommendations for governments and businesses. The report explores the dynamics of five key drivers and their likely impact on regional migration patterns in the future through the lens of 10 case studies.⁸

This report draws on an in-depth evidence review of over 100 studies to understand the current lower-skilled migration landscape in Asia, and two Asia-based online surveys of 100 business executives and 150 migrant workers to understand the reality on the ground and fill information gaps where data is scarce (see Appendices A, B and C for more details on the surveys).⁹ To corroborate the findings from the desk research and surveys, a diverse group of migration experts, labour economists and individuals working with organizations with a migration focus were interviewed.

The report is structured as follows: Section I provides a regional overview of lower-skilled labour migration in current and future contexts; Section II dives into five migration trends and corresponding case studies; and, finally, Section III outlines recommendations for policymakers and businesses.

The inability to account for future disruptions (the probability of similar crises, such as the pandemic, emerging in the future, for example) is a key limitation of the analysis. The online nature of the survey methodology presents another limitation, as conducting this part of the research in person would have allowed more nuanced insights. Finally, the outlook for regular migration is the exclusive focus of this report.

⁶ ILO, “ILO Monitor: COVID-19 and the world of work. Seventh edition”, briefing note, 25 January 2021. Available at www.ilo.org/wcmsp5/groups/public/@dgreports/@dcomm/documents/briefingnote/wcms_767028.pdf.

⁷ Ibid.

⁸ Key drivers include income differentials between countries; demographic shifts; economic transformation and infrastructure development; technological shifts and automation in the workplace; and climate change.

⁹ The business executives participating in the survey were selected from six key destinations: Japan, Malaysia, the Republic of Korea, Singapore, Thailand and Hong Kong SAR, China. They represented organizations in six sectors: agriculture and food, care work, construction, hospitality, manufacturing and retail. The executives included a mix of C-suite members (40% of those surveyed), managing directors (or equivalent), directors (or equivalent) and senior human resource managers (or equivalent). The migrant workers participating in the survey were selected from Bangladesh, Cambodia, India, Indonesia, Nepal, the Philippines and Viet Nam. These workers belonged to the same six sectors, as outlined above, and worked across the same set of destination countries as the business executives were selected from.

SECTION I: REGIONAL OUTLOOK FOR LOWER-SKILLED

LABOUR MIGRATION IN ASIA

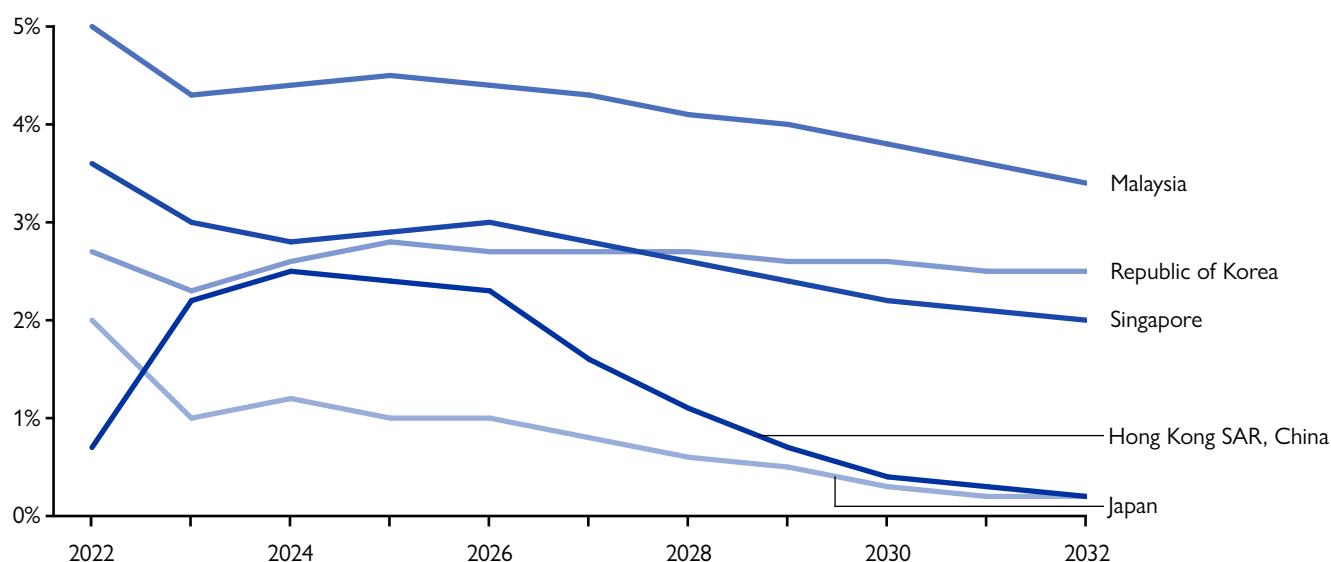
Despite the COVID-19 pandemic disrupting migrants' mobility and income, lower-skilled labour migration has slowly been increasing, in line with broader economic revival. In Figure 2, gross domestic product (GDP) forecasts for selected destination countries indicate long-term growth stabilization across most countries.

Migration per se is also playing an instrumental role in post-pandemic recovery.¹⁰ Lower-skilled labour migration from origin countries in South Asia and South-East Asia has been rapidly gaining momentum as sectors that were formerly employing large shares of migrant workers in destination countries – such as construction, manufacturing, agriculture, hospitality and retail services – recover. An increase in the demand for migrant workers owing to local labour shortages is evident in the results of the 2022 survey of business executives conducted by Economist Impact for the study on the future of labour migration in Asia: 99 per cent of business executives reported local labour shortages, with 40 per cent describing these as acute.

The desire for better quality of life through higher incomes will remain a catalyst for lower-skilled labour migration in the region in the next decade. When examining the interaction between economic factors and migration, Asian countries broadly fall into two groups: countries with low per capita incomes, abundant labour supply and relatively low human development (e.g. Bangladesh, Myanmar and Nepal), and countries with high per capita incomes, low labour supply and high human development (e.g. Japan, the Republic of Korea and Singapore). These differences would fuel mutually beneficial labour migration if managed well. Migrants would benefit from higher incomes for themselves and remittances for their families, while labour-scarce countries would receive a stable supply of workers.

Table 2 shows per capita income forecasts for selected countries from both aforementioned groups: Even three to four years from now, income differences are expected to persist. The migrant workers' survey confirms the predominance of the economic incentive to migrate: 55 per cent of the surveyed migrants say that an expectation of

Figure 2. Long-term real GDP growth forecasts in selected destinations in Asia



Source: Economist Intelligence, "Growth of real GDP per head (% per annum)", data set (2023). Available at www.eiu.com/n/solutions/viewpoint/.

¹⁰ Asian Development Bank (ADB), *Labour Mobility and Remittances in Asia and the Pacific During and After the COVID-19 Pandemic*, ADB Briefs Series, No. 204 (Mandaluyong City, 2021). Available at www.adb.org/sites/default/files/publication/761401/adb-brief-204-labour-mobility-remittances-asia-pacific-covid-19.pdf.

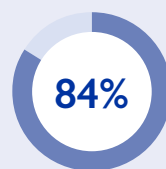
better life quality in destination countries was their reason for migrating. Furthermore, a lack of jobs in the origin country was reported as one of the key reasons for migrating by 35 per cent of respondents.

A third group of countries, such as Indonesia and the Philippines, have been making rapid gains in per capita income, have started to age but do not yet have acute labour shortages, and have achieved medium-to-high levels of human development.¹¹ While predominantly countries of origin at present, they may become net migration-positive in the long term as their per capita incomes converge to those of their more affluent counterparts.

The COVID-19 pandemic laid bare the long-standing governance gaps associated with migration in the region, aggravating the hardships migrant workers face. Evidence from the migrant workers' survey further highlights the hardships during a crisis. Just 6 per cent of the surveyed migrant workers report receiving support during the pandemic (health care, travelling back to their home countries and/or quarantine support) from their destination country government. An even lower 4 per cent, meanwhile reported receiving this support from their employers.¹²

For a system that is mutually beneficial to origin and destination countries, the financial burden of recruitment fees and other migration-related costs falls disproportionately on migrants. This is evident from the business executives' survey results, as 84 per cent of executives reported that migrant workers asked for salary advances or loans to repay earlier debt or cover costs incurred during their move. The report, *ASEAN Migration Outlook*, highlights high upfront costs as one of the key factors suppressing regular migration.¹³ Financial burden, coupled with restrictive migration policies, including, for example, worker age-, gender- and sector-related bans on migration, and burdensome visa requirements, increases the incentive to move through irregular channels.¹⁴ Due to their informal status, such migrants are also disqualified from social security schemes and protection under local laws for labour welfare in destination countries, putting them at higher risk of violence and exploitation. Finally, as most lower-skilled migration work permits are temporary, this weakens the incentive for governments to admit migrants into social security, housing, health care, education and grievance redressal systems. Addressing these governance gaps would entail making migration policies more flexible and

the process more cost-friendly for migrants, which would increase incentives for regular migration for both workers and businesses.



84 per cent of executives reported that migrant workers asked for salary advances or loans to repay earlier debt or cover costs incurred during their move.

Table 2. Medium-term per capita income forecasts in selected origin and destination countries and areas

Country or area	Forecast (in USD)		% increase
	2022	2026	
Singapore	123 780	147 770	19
Hong Kong SAR, China	70 030	82 320	18
Republic of Korea	51 260	62 620	22
Japan	46 970	54 990	17
Indonesia	14 620	19 050	30
Viet Nam	10 500	14 690	40
Philippines	9 910	12 770	29
India	8 160	10 580	30
Bangladesh	7 350	10 000	36
Cambodia	5 310	7 200	36
Myanmar	4 710	5 640	20

Source: Economist Intelligence, "GDP per head (USD)" (2023). Available at <https://viewpoint.eiu.com/data>.

¹¹ United Nations Development Programme, Human Development Index (HDI) section (2022). Available at <https://hdr.undp.org/data-center/human-development-index#/indicies/HDI> (accessed 20 October 2022).

¹² Ibid.

¹³ Association of Southeast Asian Nations (ASEAN), *ASEAN Migration Outlook* (Jakarta, 2022). Available at <https://asean.org/book/asean-migration-outlook/>.

¹⁴ United Nations Office of the High Commissioner for Human Rights (OHCHR), "Situation of migrants in transit", report (Geneva, 2021). Available at www.ohchr.org/sites/default/files/2021-12/INT_CMW_INF_7940_E.pdf.

SECTION II: OUTLOOK FOR KEY MIGRATION DRIVERS

1. DEMOGRAPHIC SHIFTS: AGEING

Asia is at the fore of population ageing owing to progressively lower fertility rates and higher life expectancies. The number of people aged over 65 in the region is expected to reach 1.3 billion by 2050. In countries such as Japan and the Republic of Korea, approximately 40 per cent of the population will be over the age of 65 in 2050.¹⁵ Other countries where rapid ageing is under way include China, Singapore, Sri Lanka and Thailand.¹⁶

A key implication of an ageing population is workforce shortages, which Asian countries are experiencing to varying degrees. In Thailand, for example, rapid ageing will contribute to a 30-per-cent decline in the working-age population between 2020 and 2060.¹⁷ Figure 3 shows increasing old-age dependency ratios over the long term in key destination countries in Asia. The following case studies dive deeper into the dynamics of ageing and labour migration.¹⁸

Case study: Ageing and labour migration in Japan

Population ageing in Japan. As of 2022, 29.1 per cent of the Japanese population was aged 65 and above, making it the most aged country globally.¹⁹ Accordingly, Japan has long been grappling with labour shortages. A 2022 study by the

Japan International Cooperation Agency (JICA) estimates that by 2040, Japan will need four times (or 6.74 million) the migrant workers it has today (1.73 million), assuming it invests aggressively in automation.²⁰

Labour migration policy landscape in Japan. Although migration has not been a strong lever among Japan's policy responses,²¹ the accelerating gap between the country's labour needs and available supply has necessitated changes in favour of allowing greater migration. Historically, the Technical Intern Training Programme launched by the Government of Japan in 1993 has been a key formal channel for migrant workers to take up employment in the country across sectors such as manufacturing, construction and services. More recently, the Specified Skilled Workers (SSW) Programme seeks to fill labour shortages across 14 delineated industries through memorandums of understanding (MoUs) with 14 Asian countries.^{22,23} Under this programme, an overall limit was set on the number of workers to be accepted between 2019 and 2023 at 345,150. However, the caps on specific subsectors such as machinery manufacturing were relaxed in 2022 owing to strengthening consumer demand.²⁴

Interaction between ageing and labour migration in Japan. Accelerated ageing and the resulting need for a variety of care services, including health care, and eldercare, will remain a key source of demand for migrant workers in Japan. Nursing care, including various types of care and support services for the elderly, features as a priority sector in the SSW Programme,²⁵ with the number of migrant workers engaged in care services, social insurance and social welfare increasing fourfold between 2016 and 2021 from 10,662 to 41,189.²⁶ The bulk of care workers are women.²⁷ Employment in the care sector peaked



By 2040, Japan will need four times the migrant workers (6.74 million) it has today (1.73 million).

¹⁵ DESA – Population Division, “2022 Revision of World Population Prospects”, data set (2022). Available at <https://population.un.org/wpp/>.

¹⁶ Ibid.

¹⁷ World Bank, “Aging and the labor market in Thailand”, report (Bangkok, 2021). Available at www.worldbank.org/en/country/thailand/publication/ageing-and-the-labour-market-in-thailand.

¹⁸ The old-age dependency ratio is the population aged 65-plus, divided by the population ages 16–64.

¹⁹ Statistics Bureau of Japan, “Chapter 2: Population and households”, data set, in: *Japan Statistical Yearbook* (2022). Available at www.stat.go.jp/english/data/nenkan/71nenkan/index.html.

²⁰ JICA Ogata Sadako Research Institute for Peace and Development, “Toward an inclusive society where diverse people, regardless of their nationality, can thrive together: Research outcomes discussed at a symposium on foreign worker acceptance”, News and Views article, 10 June 2022. Available at www.jica.go.jp/jica-ri/news/topics/20220203_02.html.

²¹ Gee Hee Hong and Todd Schneider, “Shrinkonomics: Lessons from Japan”, *Finance & Development*, March 2020. Available at www.imf.org/en/Publications/fandd/issues/2020/03/shrinkonomics-policy-lessons-from-japan-on-population-ageing-schneider.

²² Deborah J. Milly, “Japan's labor migration reforms: Breaking with the past?”, *Migration Information Source*, 20 February 2020. Available at www.migrationpolicy.org/article/japan-labour-migration-reforms-breaking-past.

²³ Copies of the memorandums of cooperation with these 14 Asian countries are available at www.moj.go.jp/isa (search: “memorandum of cooperation regarding specified skilled workers”).

²⁴ *The Japan Times*, Japan to raise caps for skilled foreign workers at manufacturers, 30 August 2022. Available at www.japantimes.co.jp/news/2022/08/30/business/japan-foreign-workers-covid-visas/.

²⁵ Japan, Ministry of Foreign Affairs, What is SSW? section (n.d.). Available at www.mofa.go.jp/mofaj/ca/fna/ssw/us/overview/.

²⁶ Maria Reinarruth D. Carlos, Katrina Navallo and Yurika Suzuki, “COVID-19 and foreign care workers in Japan: impacts on the labour market and the wellbeing of Filipino care workers”, in: *International Migration and Career Development of Nurses and Care Workers: The Case of Asia* (Y. Tsujita, ed.), Bangkok Research Center (BRC) Research Report No. 31 (Bangkok, BRC and Institute of Developing Economies, Japan External Trade Organization (IDE-JETRO), 2022). Available at www.ide.go.jp/English/Publish/Reports/Brc/31.html.

²⁷ Edward Asis and Rogie Royce Carandang, “The plight of migrant care workers in Japan: A qualitative study of their stressors on caregiving,” *Journal of Migration Health*, 1–2:100001 (September 2020). Available at www.ncbi.nlm.nih.gov/pmc/articles/PMC8352095/.

during COVID-19, as migrants previously employed in the construction and manufacturing sectors switched to care work after losing their jobs owing to the pandemic.²⁸ As these sectors continue to reabsorb workers, the need to sustain labour demand in the care sector will potentially lead to an increase in migration to Japan. The Philippines is expected to remain a key source of care workers for Japan as part of an agreement between Japan and the Republic of the Philippines for an economic partnership.²⁹ Besides the care sector, labour migration to the construction and manufacturing sectors will also continue to grow as ageing creates labour shortages in these sectors. The SSW Programme specifies machine parts and tooling, industrial machinery, construction, shipbuilding and ship machinery among key industries employing migrant workers.³⁰

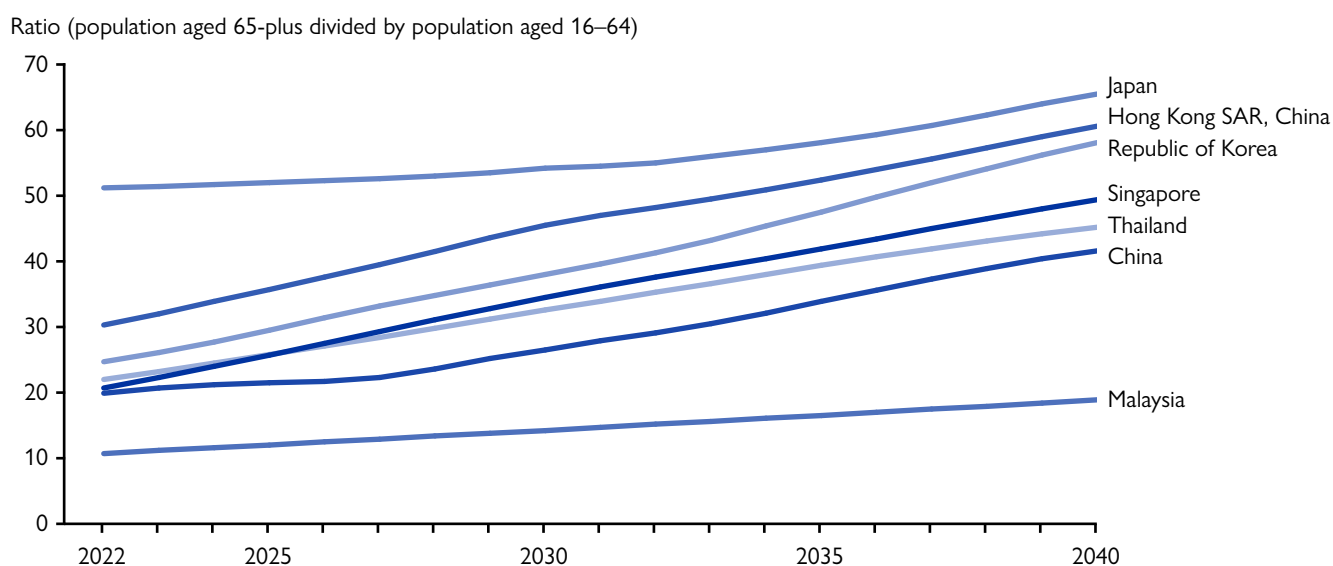
Case study: Ageing and labour migration in the Republic of Korea

Population ageing in the Republic of Korea. The Republic of Korea's population had fallen for the first time in 2019. Its working-age population is expected to decline by

9 per cent between 2005 and 2030, and by 26 per cent from then until 2050.³¹ Fertility decline, along with a high proportion of the population aged over 65 (estimated to be almost 40% by 2050), are creating varying degrees of labour shortages, which are likely to lead to the country attracting migrant workers from abroad. Evidence from the migrant workers' survey also points to an increase in demand for jobs in the care sector; in conjunction with the growing share of the aged population: 92 per cent of the surveyed migrants working in the Republic of Korea are aware of an increase in the number of home eldercare jobs in their destination country.

Labour migration policy landscape in the Republic of Korea. The Republic of Korea's Employment Permit System (EPS), launched in 2004, brought migrant workers from various Asian countries into sectors experiencing crucial shortfalls, including manufacturing, agriculture and fishing.³² Currently, labour migration is managed via the EPS, with the Government of the Republic of Korea announcing its decision in 2022 to increase the migrant workers' quota to help alleviate a shortage of about 234,000 workers across

Figure 3. Old-age dependency ratio forecasts in selected destination countries or areas in Asia



Source: DESA, 2022 Revision of World Population Prospects (2022). Available at <https://population.un.org/wpp>.

²⁸ Ibid.

²⁹ Japan, Ministry of Foreign Affairs, Agreement between Japan and the Republic of the Philippines for an Economic Partnership, signed in Helsinki, 9 September 2006. Available at www.mofa.go.jp/region/asia-paci/philippine/epa0609/index.html.

³⁰ Government of Japan, Employment Fields Covered by Specified Skilled Worker section (2006). Available at www.ssw.go.jp/en/about/visa/.

³¹ Darcie Draudt, "South Korea's migrant policies and democratic challenges after the candle light movement", Academic Paper Series, 17 October (Washington, D.C., Korea Economic Institute of America, 2019). Available at https://keia.org/wp-content/uploads/2020/05/kei_aps_draudt_191017.pdf.

³² Countries participating in the Republic of Korea's EPS include Bangladesh, Cambodia, China, Indonesia, Kyrgyzstan, Lao People's Democratic Republic, Mongolia, Myanmar, Nepal, Pakistan, the Philippines, Sri Lanka, Thailand, Timor Leste, Uzbekistan and Viet Nam. The EPS website is available at www.eps.go.kr/ko/langMain.eo?langCD=ph.

sectors, particularly in shipbuilding and manufacturing.³³ At the same time, the Government's migration policy favours temporary migration.³⁴

Interaction between ageing and labour migration in the Republic of Korea. According to data from Statistics Korea, 2020 marked the highest annual growth in new jobs, with 710,000 added to the labour market (up 2.9% from 2019).³⁵ This growth is largely due to increasing labour needs in the health, social welfare service and public administration sectors as the country rapidly ages. People in their 60s filled about half (380,000) of the new jobs amid an expansion in temporary work for senior citizens by the Government.³⁶ Since the senior citizen-focused employment strategy for health-related services may not be sustainable in the long run, the Government may need to revisit its migration policy to expand the scope of the sectors in which migrant workers can access jobs.

Despite rapid ageing in the Republic of Korea, a long-term shift towards significantly high lower-skilled labour migration (compared to historical numbers) is unlikely, as recent regulatory changes indicate. In October 2022, the Ministry of Employment and Labor (MOEL) announced a local employment revitalization plan aimed at creating higher-quality jobs for locals.³⁷ In addition, the Serious Disasters Punishment Act, a 2022 regulation holding a firm's management responsible for worker-related accidents, is spurring large-scale investment in robots to reduce dependence on workers, especially in manufacturing and construction.³⁸ In the long term, technology adoption in manufacturing could significantly impact the current high concentration of migrant workers in the sector (45% of the total workforce as of 2019).³⁹



92 per cent of the surveyed migrants working in the Republic of Korea are aware of an increase in the number of home eldercare jobs in their destination country.

Outlook for lower-skilled migration due to ageing

Migration is expected to remain a vital solution to labour shortages in the next decade for ageing destination countries – side by side with advances in technology and policies that increase the retirement age and facilitate women's labour participation.⁴⁰ In tandem with the growing share of the aged population in these countries, lower and semi-skilled migrant workers will play a prominent role in their care sectors, including in health care, eldercare and childcare. Japan and the Republic of Korea will lead this trend, as the case studies show.

Further, the coming years may see gradual changes in patterns of migration to ageing countries. China and Viet Nam have historically been key sources of migrant workers for countries that are at mature ageing stages, including Japan and the Republic of Korea.⁴¹ As these countries are relatively newly ageing, they may need to increasingly prioritize domestic labour management.⁴² On the other hand, developing South Asian and South-East Asian countries with relatively abundant, younger populations may send more migrants to ageing countries to meet their labour demands. Evidence from Bangladesh is indicative of this potential new labour pattern: the Government of Bangladesh has begun tapping into the Japanese labour market by setting up 30 technical training centres that offer Japanese language and culture training to youth, in addition to vocational skills.⁴³

³³ Dong-hwan Ko, "Gov't to increase quote for migrant workers", *The Korea Times*, 8 August 2022. Available at www.koreatimes.co.kr/www/nation/2022/08/281_334089.html.

³⁴ Organisation for Economic Cooperation and Development (OECD), *Recruiting Immigrant Workers: Korea 2019* (Paris, OECD Publishing, 2019). Available at www.oecd.org/employment/recruiting-immigrant-workers-korea-2019-9789264307872-en.htm.

³⁵ Korean Statistical Information Service (KOSIS), "Employed persons by status of worker", Economically active population survey (2022). Available at <https://kosis.kr/eng/search/searchList.do> (accessed 30 October 2022).

³⁶ *Business Standard*, "South Korea added largest number of job positions in 2020 amid rapid aging", 7 December 2021. Available at www.business-standard.com/article/international/south-korea-added-largest-number-of-job-positions-in-2020-amid-rapid-aging-121120700293_1.html.

³⁷ Republic of Korea, Labor (MOEL), "MOEL announces Local Employment Revitalization Plan", MOEL news article, 7 October 2022. Available at www.moel.go.kr/english/news/moelNewsDetail.do?idx=3126.

³⁸ MOEL, "MOEL held a meeting with major public institutions where industrial accidents and deaths frequently occur", MOEL news article, 18 January 2022. Available at www.moel.go.kr/english/news/moelNewsDetail.do?idx=3065.

³⁹ Seung-Cheol Jeon, "Foreign workers in the Korean labour market: current status and policy issues", Bank for International Settlements (BIS) Papers No. 100 (Basel, Switzerland, BIS, 2019). Available at https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3332028.

⁴⁰ Saheli Roy Choudhury and Akiko Fujita, "Japan's 'womenomics' plans are driving change in the country", *CNBC*, 2 April 2018. Available at www.cnbcm.com/2018/04/02/working-in-japan-investing-in-women-could-boost-economic-growth.html.

⁴¹ DESA – Population Division, "International migrant stock 2020" (see footnote 3).

⁴² Stella Yifan Xie and Liyan Qi, "Chinese Factories Are Having Labor Pains – 'We Can Hardly Find Any Workers'", *The Wall Street Journal*, 25 August 2021. Available at www.wsj.com/articles/chinese-factories-are-having-labor-pains-we-can-hardly-find-any-workers-11629883801.

⁴³ Imtiaz Ahmed, *Dhaka Tribune*, "Bangladesh to tap G7 labour market next year through Japan", 26 January 2022. Available at www.dhakatribune.com/business/2022/01/26/bangladesh-to-tap-g7-labour-market-next-year-through-japan.

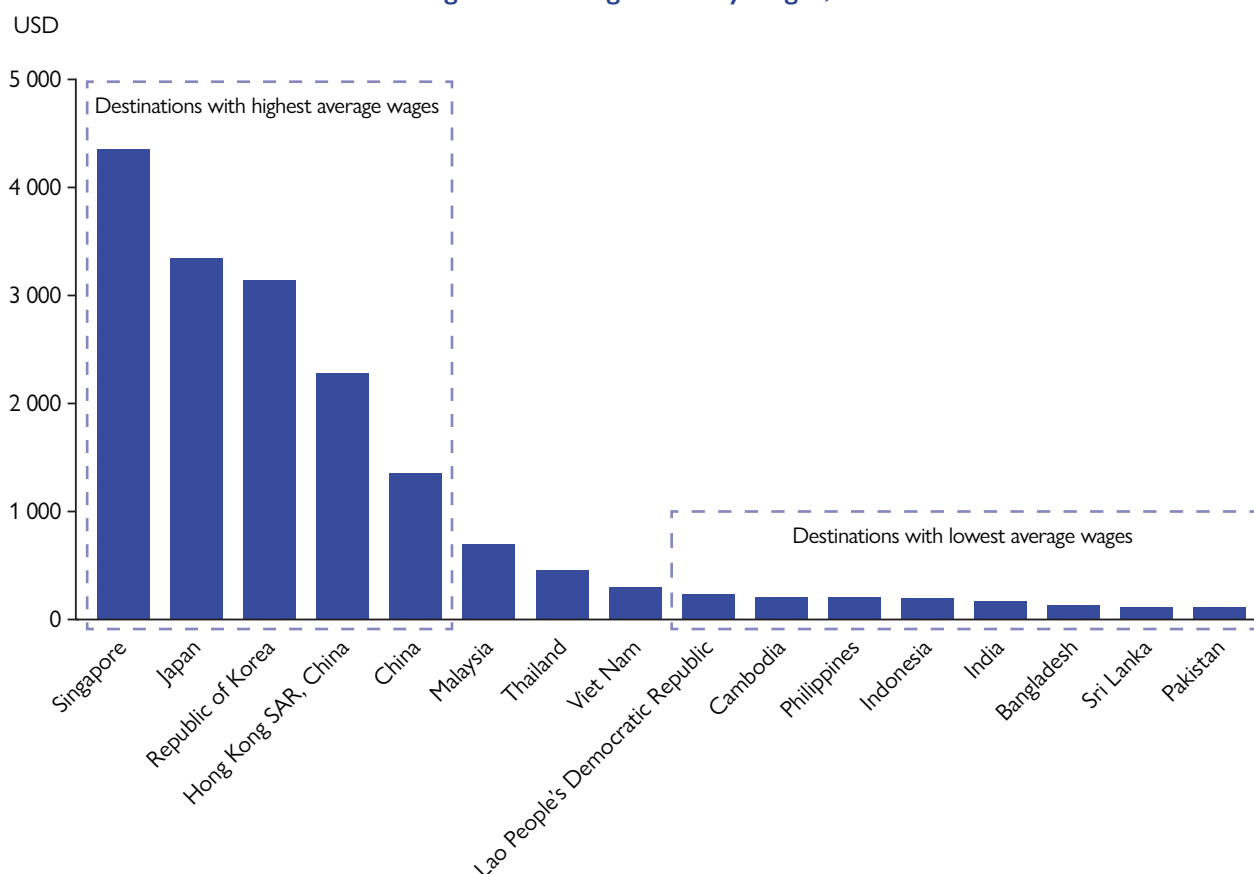
While rapid ageing in Asia will continue to fuel lower-skilled migration to varying degrees, its impact on migration numbers will be influenced by the extent of technology adoption, as well as the outcomes of competing policy priorities – that is, supporting businesses’ labour needs while addressing concerns around local employment security. Another factor that may influence the scale of migration is the inadequate recognition of workers’ skills by destination countries. For example, while the EPS system in the Republic of Korea applies rigorous admission criteria (especially education criteria) for potential migrant workers, there is evidence of some EPS workers being matched to jobs that do not align with their skills and education levels – and that are also hazardous or culturally inappropriate in some cases.⁴⁴ A challenge not highlighted enough relates to the mental health of migrant workers in caregiving and nursing. A 2020 study identified psychological issues faced by migrant caregivers in Japan, including anxiety and depression, resulting from health problems, heavy workloads, patient hostility and language

barriers, among other factors.⁴⁵ Addressing these challenges will not only benefit existing care workers but will also attract more potential migrant caregivers.

2. INCOME DIFFERENTIALS BETWEEN COUNTRIES

Since migration has been a strategy to mitigate poverty, support livelihood development and find productive employment abroad, lower-skilled workers tend to migrate to economies that would increase their probability of securing higher incomes and better living conditions. All interviewed experts corroborate that the potential to earn higher incomes and lead better-quality lives is the most fundamental motivation for migration – particularly among lower-skilled migrant workers. This factor has strongly influenced intra-ASEAN, South Asia–ASEAN and ASEAN–East Asia migration and is driven by a key characteristic of this broad region: economic divergence.

Figure 4. Average monthly wages, 2021



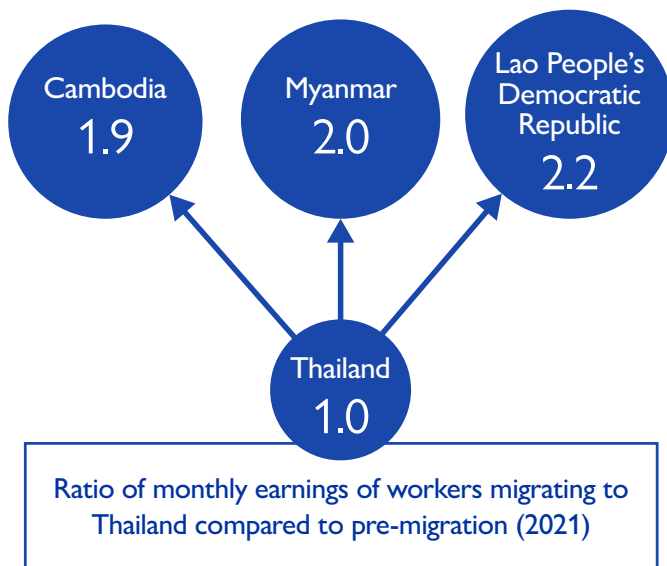
Source: Economist Intelligence, “Average wages (monthly USD)”, data set (2023). Available at www.eiu.com/n/solutions/viewp (accessed 15 October 2022).

⁴⁴ Min Ji Kim, “The Republic of Korea’s Employment Permit System (EPS): background and rapid assessment”, International Migration Papers, No. 119 (Geneva, ILO, 2015). Available at www.researchgate.net/publication/274078018_The_Republic_of_Korea’s_Employment_Permit_System_EPS_Background_and_Rapid_Assessment.

⁴⁵ Asis and Carandang, “The plight of migrant care workers in Japan” (see footnote 27).

As Figure 4 shows, Asian countries presented a varied landscape of average earnings. Those with the highest average monthly earnings per worker included Singapore, Japan, the Republic of Korea and Hong Kong Special Administrative Region, China. Conversely, Pakistan, Sri Lanka, Bangladesh, India and Cambodia were among countries that had low monthly earnings per worker. Historically, countries with the lowest gross average earnings had the highest outbound migration rates Pakistan, Sri Lanka, Bangladesh, Cambodia, the Philippines and Nepal, among others. The *Spotlight on Labour Migration in Asia* report showed that migrants from all three major corridors to Thailand (namely, Cambodia, Lao People's Democratic Republic and Myanmar) earned almost double what they did back home (Figure 5).

Figure 5. Ratios of migrant workers' earnings in Thailand versus their origin countries, 2021



Source: Economist Impact, *Spotlight on Labour Migration in Asia: A Factor Analysis Study* (Geneva, IOM, 2021). Available at <https://publications.iom.int/books/spotlight-labour-migration-asia>.

While migrant workers tend to earn higher incomes in destination countries, they are often paid less than their local counterparts. The migrant workers' survey results largely corroborate this observed trend: 67 per cent of the surveyed workers report that their local counterparts earn higher wages for the same job.

The dynamics of income differentials, as a migration driver, differ markedly for women. Women migrant workers are employed in highly feminized sectors, such as health care, domestic work, entertainment, manufacturing and textiles (particularly in Malaysia, Singapore and Hong Kong SAR, China). They tend to earn lower wages than male migrants due to overrepresentation in lower-skilled, lower-paying jobs – with the bulk of these in domestic work, the lowest paying category of care work.⁴⁶ The migrant workers' survey reveal interesting trends in gender pay parity: Just 27 per cent of workers report that men are paid higher than women for the same job in their destination countries. The number rises significantly in their home countries: Over 75 per cent of workers report a gender pay gap in favour of men.

Case study: Income differentials as a driver of migration from the Philippines

Although international labour migration was initially facilitated by the Government of the Philippines in 1975 as a temporary solution to growing unemployment, it became an enduring feature of the economy over the years.⁴⁷ Migration had grown from approximately 36,000 workers since then to a staggering 1.77 million as of 2020.⁴⁸ Hong Kong SAR, China and Singapore featured among key destinations in Asia, with 6.3 per cent and 5.3 per cent of total overseas workers employed in these countries, respectively.⁴⁹ Women domestic workers represented a sizable share of migrant workers in these countries. According to data from the Philippine Statistics Authority (PSA), over 70 per cent of the 1.06 million women migrant workers were employed in elementary occupations.⁵⁰

⁴⁶ Maelan le Goff, "Feminization of migration and trends in remittances", *IZA World of Labour*, January 2016. Available at <https://wol.iza.org/uploads/articles/220/pdfs/feminization-of-migration-and-trends-in-remittances.pdf>.

⁴⁷ OECD and Scalabrini Migration Center, *Interrelations between Public Policies, Migration and Development in the Philippines*, OECD Development Pathways Series (Paris, OECD Publishing, 2017). Available at www.oecd.org/countries/philippines/interrelations-between-public-policies-migration-and-development-in-the-philippines-9789264272286-en.htm.

⁴⁸ Philippine Statistics Authority, "2020 overseas Filipino workers (final results)", data set (2020). Available at <https://psa.gov.ph/statistics/survey/labor-and-employment/survey-overseas-filipinos> (accessed 15 October 2022).

⁴⁹ Ibid.

⁵⁰ Ibid. (According to the PSA: "Elementary occupations involve the performance of simple and routine tasks which may require the use of hand-held tools and considerable physical effort. Most occupations in this major group require skills at the first ISCO [i.e. the International Standard Classification of Occupations, specifically, ISCO-08] skill level. Tasks performed by workers in elementary occupations usually include [numbering added by authors]: (i) cleaning, restocking supplies and performing basic maintenance in apartments, houses, kitchens, hotels, offices and other buildings; (ii) washing cars and windows; (iii) helping in kitchens and performing simple tasks in food preparation; (iv) delivering messages or goods; (v) carrying luggage and handling baggage and freight; (vi) stocking vending machines or reading and emptying meters; (vii) collecting and sorting refuse; (viii) sweeping streets and similar places; (ix) performing various simple farming, fishing, hunting or trapping tasks performing simple tasks connected with mining, construction and manufacturing including product-sorting; (x) packing and unpacking produce by hand and filling shelves; (xi) providing various street services; (xii) pedalling or hand-guiding vehicles to transport passengers and goods; and (xiii) driving animal-drawn vehicles or machinery. Supervision of other workers may also be included". (PSA, 2012 Philippine Standard Occupational Classification (PSOC) section (n.d.). Available at <https://psa.gov.ph/classification/psoc/?q=psoc/major.>)

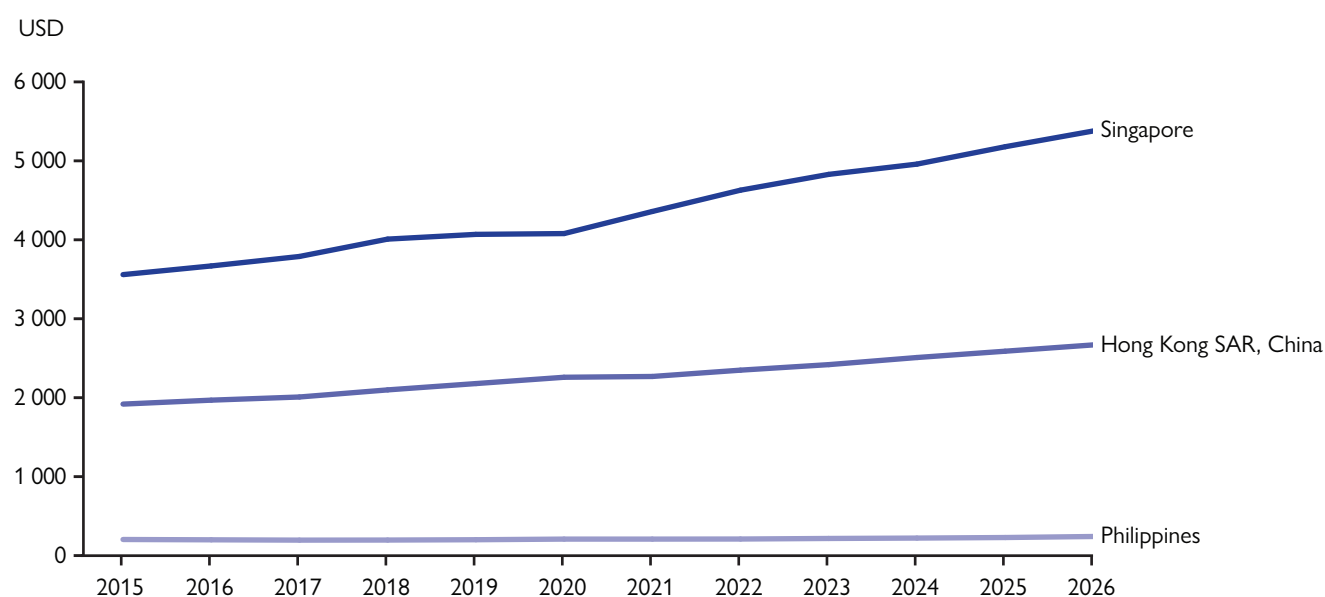
Income and employment opportunity differentials were a fundamental driver of lower-skilled labour migration from the Philippines. According to the migrant workers' survey conducted by Economist Impact for the current study, the top three selected reasons for migration by Filipino migrant workers were connected with better earning potentials: better life quality in destination countries (e.g. availability of education, health care and infrastructure) (54.5%), a lack of jobs in the home country (45.5%) and better incomes in destination countries (40.9%).

In Hong Kong SAR, China, Filipinos (who made up the largest group of migrant domestic workers, numbering over 200,000) could earn almost fourfold of the minimum wage back home: The minimum wage in the Philippines is around USD 10 per day,⁵¹ while the rate stands at USD 38 per day in Hong Kong SAR, China.⁵² This is particularly significant given that the bulk of Filipino migrant workers in Hong Kong SAR, China were women domestic workers who

experienced a wage gap in favour of men back home.⁵³ The survey results confirm this, as almost 82 per cent of Filipino migrant workers report that men are paid more than women for the same job in their home country.

Economist Intelligence data shows that over the next five years, income differentials between the Philippines and destination countries with large shares of Filipino migrant workers would persist, continuing to drive lower-skilled migration from the Philippines (Figure 6). In the coming years, increasing tertiary enrolment rates among women in key destination countries for Filipino migrant workers will fuel their labour participation, causing an uptrend in outsourcing housework and care duties to domestic workers.^{54,55} The demand for Filipino migrant domestic workers will continue to be facilitated through their relatively higher education levels and English communication skills.⁵⁶

Figure 6. Outlook for average monthly wages in the Philippines and key destination countries and areas in Asia (data projected for 2022–2026)



Source: Economist Intelligence, “Average wages (monthly USD)”, data set (2023). Available at <https://viewpoint.eiu.com/data> (accessed 15 October 2022).

⁵¹ Philippines, Department of Labor and Employment, “NCR and Western Visayas wage boards grant minimum wage increase”, news release, 14 May 2022. Available at www.dole.gov.ph/news/ncr-and-western-visayas-wage-boards-grant-minimum-wage-increase/.

⁵² Hong Kong SAR, China – Labour Department, Statutory Minimum Wage section (2021). Available at www.labour.gov.hk/eng/news/mwo.htm (accessed 20 October 2022).

⁵³ Helle Buchhave and Nadia Belhaj Hassine Belghith, “Overcoming barriers to women’s work in the Philippines”, World Bank Blogs, 11 April 2022. Available at <https://blogs.worldbank.org/eastasiapacific/overcoming-barriers-womens-work-philippines>.

⁵⁴ Lim Wooyoung and Sujata Visaria, “The borrowing puzzle: Why do Filipino domestic workers in Hong Kong, China borrow rather than dissave?” *Asian Development Review*, 37(2):77–99 (2020). Available at www.worldscientific.com/doi/full/10.1162/adev_a_00150.

⁵⁵ Women in Informal Employment: Globalizing and Organizing (WIEGO), Domestic Workers – Essential but Vulnerable Workers section (2022). Available at www.wiego.org/informal-economy/occupational-groups/domestic-workers.

⁵⁶ International Labour Organization (ILO), *Domestic Workers Across the World: Global and Regional Statistics and the Extent of Legal Protection* (Geneva, 2013). Available at www.ilo.org/public/libdoc/ilo/2013/113B09_2_engl.pdf.

Case study: Income differentials as a driver of migration from Bangladesh

According to the *World Migration Report 2022*, 7.4 million Bangladeshi migrants were living abroad in 2020, making it the sixth largest migrant-sending country.⁵⁷ The underlying drivers for these migrants were largely economic. According to the migrant workers' survey, the top three selected reasons for migration by Bangladeshi workers were better life quality (e.g. availability of education, health care and infrastructure) (48%) and better incomes (48%) in destination countries, and a lack of jobs in the home country (48%).

Remittances, facilitated by higher earning potentials in destination countries, have played a critical role in the Bangladeshi economy: While these were usually invested by receiving families during normal times, they helped meet basic expenses during the COVID-19 pandemic.⁵⁸ The numbers are telling: Research from the Refugee and Migratory Movements Research Unit in Bangladesh show that families of overseas Bangladeshi migrants used remittances to cover up to 85 per cent of their daily expenses.⁵⁹ Total remittances accounted for over 6 per cent of Bangladesh's GDP.⁶⁰

Apart from countries in the Middle East, key destination countries for Bangladeshi migrant workers in Asia include India, Malaysia and Singapore, which host 33 per cent, 5.6 per cent, and about 2 per cent of workers, respectively.^{61,62} The income differentials between Bangladesh and these countries varied, with workers receiving a large wage premium in Singapore, as Figure 4 shows.

While income differentials were a strong driver for migration, high migration costs imposed a sizable burden on Bangladeshi migrant workers, delaying the realization of net positive earnings in the destination country. A 2021 World Bank study estimated that the average Bangladeshi migrant worker paid upfront migration costs equivalent to approximately three years of earnings in Bangladesh.⁶³ Results of the current study's migrant workers' survey show that 48 per cent of Bangladeshi migrant workers took between one and two years; 16 per cent took more than two years; and a mere 4 per cent took three to six months to pay off loans that they took out to cover migration costs.

Outlook for lower-skilled labour migration driven by income differentials

The case studies and survey results from the current study suggest that the economic security afforded by higher incomes would continue to provide impetus to lower-skilled labour migration from countries with low average incomes in the next decade. This fundamental push factor may interact with other drivers such as climate change, technological changes, better employment opportunities and demographic shifts. A labour economist interviewed by Economist Impact noted that, under current global economic conditions, workers factor in not just income differentials but also the cost of living in their migration decision.

The migrant workers' survey results add nuance to the understanding of income differentials as a migration driver: Higher incomes are not necessarily perceived as an end in themselves by migrant workers, but rather as a means to better quality of life, which includes, for example, superior health care, education and infrastructure. When asked whether they would consider going back to their country of origin if it were to offer the same income as their destination country, 62 per cent of migrant workers would prefer to remain in the destination country. Even if the country of origin were to offer a higher income, almost 52 per cent of workers would still prefer to stay back.

Valerie Mueller, a rural climate vulnerability expert and Associate Professor at Arizona State University, concurs that climate change would become an underlying factor prompting the migration of rural Bangladeshi workers for better economic opportunities.



⁵⁷ IOM, *World Migration Report 2022* (see footnote 1).

⁵⁸ M.N.I. Sorkar, "COVID-19 pandemic profoundly affects Bangladeshi workers abroad with consequences for origin communities", *Migration Information Source*, 9 July 2020. Available at www.migrationpolicy.org/article/covid-19-pandemic-profoundly-affects-bangladeshi-workers-abroad-consequences-origin.

⁵⁹ Ibid.

⁶⁰ IOM, *World Migration Report 2022* (see footnote 1).

⁶¹ DESA – Population Division, "International migrant stock 2020" (see footnote 3).

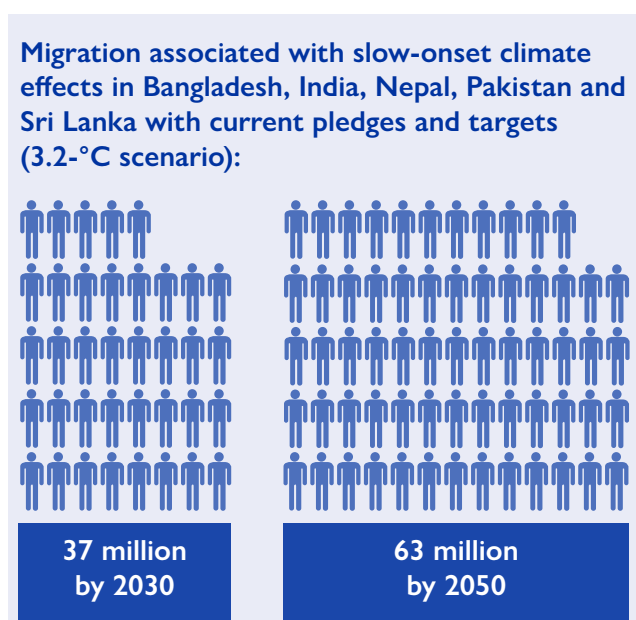
⁶² Holy See, Dicastery for Integral Human Development – Migrants and Refugees Section, "Migration profile: Bangladesh", *Migratory Profiles Series* (2022). Available at <https://migrants-refugees.va/country-profile/bangladesh/>.

⁶³ Laurent Bossavie, Joseph-Simon Görlach, Çağlar Özden and He Wang, "Temporary migration for long-term investment", Policy Research Working Paper No. 9740 (Washington, D.C., World Bank, 2021). Available at <https://openknowledge.worldbank.org/bitstream/handle/10986/36040/Temporary-Migration-for-Long-term-Investment.pdf?sequence=1&isAllowed=y>.

3. CLIMATE CHANGE

South and South-East Asia sit precariously on the front lines of climate change. According to a study on climate inaction and displacement in South Asia, not limiting global warming to 1.5–2.2°C above pre-industrial levels would result in 37.4 million people being displaced by 2030, and 62.9 million by 2050 from Bangladesh, India, Nepal, Pakistan and Sri Lanka (3°C scenario).⁶⁴ Such displacement would primarily be driven by the slow-onset impacts of sea-level rise, water stress, crop yield reductions, ecosystem loss and droughts. In South-East Asia, too, the economic impacts of climate change on fisheries, agriculture and tourism are projected to reduce the region's GDP by 11 per cent by the end of this century.⁶⁵ These impacts

Figure 7. Interaction between climate change and labour migration



Source: Harjeet Singh, Jessica Faleiro, Teresa Anderson and Sanjay Vashist, "Costs of climate inaction: Displacement and distress migration", report (Johannesburg, ActionAid; Dhaka, Climate Action Network – South Asia (CANSA); Berlin, Bread for the World – Protestant Development Service, 2020). Available at <https://actionaid.org/publications/2020/costs-climate-inaction-displacement-and-distress-migration>.

would, in turn, influence lower-skilled labour migration patterns, as demonstrated by the following case studies.

Case study: Bangladesh

Climate change in Bangladesh. Bangladesh is projected to be the seventh-most vulnerable country to rising temperatures, both geographically and economically.⁶⁶ According to the Global Climate Risk Index 2021, Bangladesh suffered economic losses worth USD 3.72 billion between 2000 and 2019 as a result of climate change.⁶⁷ In the coming years, rising temperatures are projected to make parts of Bangladesh uninhabitable, as excess heat may breed a host of diseases and cause prolonged droughts, resulting in crop failures. Rising sea levels and water salinity are also estimated to lead to the displacement of 15 to 30 million Bangladeshis in the coming decades, largely due to the impact of flooding and marine biodiversity losses on agriculture and fisheries.⁶⁸

Interaction between climate change and migration. The economic losses due to reduced agricultural yield would propel farmers to migrate to secure alternative income sources.⁶⁹ In a revealing finding, 72 per cent of the surveyed migrant workers from Bangladesh report that people from the same residential areas of their home country had experienced significant losses from events like floods, droughts and land erosion, with 20 per cent of these being frequent losses. In addition to land becoming uninhabitable, forcibly driving migrant workers to migrate elsewhere, a key driver of climate change-induced migration is the desire to support post-disaster recovery through remittances (i.e. using migration as an adaptation strategy). Valerie Mueller, a rural climate vulnerability expert and associate professor at Arizona State University, concurs that climate change would become an underlying factor prompting the migration of rural Bangladeshi workers for better economic opportunities. In this regard, Mueller expects primarily two mobility patterns: internal movement towards large cities like Dhaka, and occupational movement from agriculture to aquaculture – the latter owing to increased soil salinity.

Forty per cent of the surveyed Bangladeshi migrant workers state that people from their residential areas back home

⁶⁴ Harjeet Singh, Jessica Faleiro, Teresa Anderson and Sanjay Vashist, "Costs of climate inaction: Displacement and distress migration", report (Johannesburg, ActionAid; Dhaka, Climate Action Network – South Asia (CANSA); Berlin, Bread for the World – Protestant Development Service, 2020). Available at <https://actionaid.org/publications/2020/costs-climate-inaction-displacement-and-distress-migration>.

⁶⁵ Amit Prakash, "Boiling point", *Finance & Development*, September 2018. Available at www.imf.org/en/Publications/fandd/issues/2018/09/southeast-asia-climate-change-and-greenhouse-gas-emissions-prakash.

⁶⁶ David Eckstein, Vera Künzel and Laura Schäfer, *Global Climate Risk Index 2021* (Bonn and Berlin, Germanwatch, 2021). Available at www.germanwatch.org/sites/default/files/Global%20Climate%20Risk%20Index%202021_2.pdf.

⁶⁷ Diego Rojas, "How the climate crisis is impacting Bangladesh", The Climate Reality Project article, 9 December 2021. Available at www.climate-reality-project.org/blog/how-climate-crisis-impacting-bangladesh.

⁶⁸ Mubashar Hasan and Geoffrey Macdonald, "How climate change deepens Bangladesh's fragility", analysis and commentary, 13 September 2021. Available at www.usip.org/publications/2021/09/how-climate-change-deepens-bangladeshs-fragility.

⁶⁹ Kazi Iqbal and Paritosh K. Roy, *Examining the Impact of Climate Change on Migration through the Agricultural Channel: Evidence from District Level Panel Data from Bangladesh*, South Asian Network for Development and Environmental Economics (SANDEE) Working Paper No. 84-14 (Kathmandu, SANDEE, 2014). Available at <https://ideas.repec.org/p/snd/wpaper/84.html>.

were planning to migrate internally due to climate change-related losses, and another 40 per cent indicate plans for international migration.

Further, since migration is dominated by the males in Bangladeshi households agriculture's reliance on women has been increasing (the share of women in agriculture rose by 9.3 percentage points between 2010 and 2019).⁷⁰ The average share of spending on agricultural adaptation to storms in women-led agricultural households (31%) is double the total households' average spending of 15 per cent despite women's lower average incomes than men despite women's lower average incomes than men.⁷¹ As climate change intensifies, the potentially higher increase in spending in women-led households may continue to fuel further geographic and occupational migration.

Geographic proximity, combined with pre-existing social networks and cultural similarities, may continue to drive climate-induced migration of primary sector workers towards India given the shorter distance.⁷² DESA data shows that 36 per cent of all Bangladeshi migrants were in India in 2019. The Indo–Bangladesh border, the fifth-largest land border globally, is also mostly porous.⁷³ Bangladeshis working in non-primary sector jobs in their home country are likely to continue favouring other destinations with more open migration policies. For example, around 8 million Bangladeshi migrants were working in the Middle East, primarily in construction and manufacturing in 2020.⁷⁴

Case study: Cambodia

Climate change in Cambodia. Cambodia's primary sector, in particular rice cultivation, livestock production and fisheries, has contributed to a quarter (25%) of the country's GDP and employs nearly half (49%) of its total labour force

in 2020.⁷⁵ However, due to rising temperatures and unpredictable rainfall patterns caused by climate change, this sector had been struggling.⁷⁶ Further, debt incurred to build resilience against climate change-induced losses had been growing as a result of the increasing severity of weather events.⁷⁷

Over the years, rising temperatures, unpredictable rainfall and deforestation have significantly decreased paddy yields in Cambodia, leading to food and income insecurity. In particular, diminishing precipitation in the paddy cultivation-reliant provinces of northwest Cambodia have increased the likelihood of rice worker migration for livelihood security.^{78,79} Over 80 per cent of the surveyed migrant workers from Cambodia report that people from their residential area in their home country have experienced serious losses from events like floods, droughts and land erosion, with 19 per cent citing frequent or recurrent losses.

Interaction between climate change and migration in Cambodia. As impacts from climate change in Cambodia intensify over the next decade, migration would potentially increase, comprising internal rural–urban migration and cross-border migration, especially to Thailand. The former has been historically predominant in Cambodia, with four of the provinces closest to Phnom Penh sending majority of their migrants to the capital city.⁸⁰ By 2035, Phnom Penh's radius is expected to expand by 100km, owing to growth in the garment sector, real estate and tourism – resulting in an additional 6 million people.⁸¹ Furthermore, the manufacturing and services sectors in Cambodia were forecast to have robust average growth of 6 per cent and 4.5 per cent, respectively, over the next five years, which may augment domestic job opportunities.⁸² Around 75 per cent of the surveyed migrant workers report that people from their

⁷⁰ ADB, *Asian Development Outlook 2021 Update (Theme Chapter: Transforming Agriculture in Asia)* (Mandaluyong City, ADB, 2021). Available at www.adb.org/publications/asian-development-outlook-2021-update.

⁷¹ Shaikh Eskander, Paul Steele, Mamunur Rashid, Nuzhat Imam and Sirazoom Munira. "Still bearing the burden: how poor rural women in Bangladesh are paying most for climate risks", working paper (London, International Institute for Environment and Development, 2022). Available at www.iied.org/sites/default/files/pdfs/2022-05/20851iied.pdf.

⁷² Madhumita Sarma, *A Study of Migration from Bangladesh to Assam, India and Its Impact* [PhD thesis] (Adelaide, University of Adelaide, 2015). Available at <https://digital.library.adelaide.edu.au/dspace/bitstream/2440/97379/3/02whole.pdf>.

⁷³ Sreeparna Banerjee, "Porous borders: The Indo-Bangladesh challenge of human trafficking", Observer Research Foundation article, 20 July 2022. Available at www.orfonline.org/expert-speak/the-indo-bangladesh-challenge-of-human-trafficking.

⁷⁴ Md Owasim Uddin Bhuyan, "Bangladeshi migrants hit hard in Middle East", *NewAge Bangladesh*, 24 March 2020. Available at www.newagebd.net/article/103061/bangladeshi-migrants-hit-hard-in-middle-east.

⁷⁵ World Bank, *Climate Change Knowledge Portal: Cambodia section* (2021). Available at https://climateknowledgeportal.worldbank.org/sites/default/files/2021-08/15849-WB_Cambodia%20Country%20Profile-WEB.pdf.

⁷⁶ The Ministry of Economy and Finance and the National Council for Sustainable Development estimate that climate change impacts could reduce Cambodia's expected GDP by almost 10 per cent by 2050, even if temperature increase is kept within the 2°C target.

⁷⁷ Frank Bliss, "Micro" finance in Cambodia: development, challenges and recommendations", *AVE Study 30/2022* (Duisberg, Institute for Development and Peace, 2022). Available at www.uni-due.de/imperia/md/content/inef/bliss__2022_-_micro__finance_in_cambodia__ave30_.pdf.

⁷⁸ Thi Phuoc Lai Nguyen and Chanmony Sean, "Do climate uncertainties trigger farmers' out-migration in the Lower Mekong Region?", *Current Research in Environmental Sustainability*, 3:100087 (2021). Available at www.sciencedirect.com/science/article/pii/S2666049021000633.

⁷⁹ Maryann Bylander, "Cambodian migration to Thailand: the role of environmental shocks and stress", *KNOMAD Working Paper No. 7* (Washington, D.C., KNOMAD, 2016). Available at www.knomad.org/sites/default/files/2017-04/KNOMAD%20WorkingPaper%20CAMBODIAN%20MIGRATION%20TO%20THAILAND%20FinalJan19.pdf.

⁸⁰ Mizpah Grace Castro, "Phnom Penh set to expand radius, population under 2035 Master Plan", *Independent Property Services* article. 26 July 2021. Available at <https://ips-cambodia.com/phnom-penh-set-for-expansion-under-2035-masterplan/>.

⁸¹ Ibid.

⁸² Economist Intelligence, *Data Tool section* (2022). Available at <https://viewpoint.eiu.com/data/> (accessed 20 October 2022).

residential areas back home plan to migrate internally due to losses resulting from climate stress.

Thailand had consistently been the top destination country for Cambodian workers migrating abroad.⁸³ Despite being exposed to job insecurity and financial hardships during COVID-19, these workers were keen to re-migrate to Thailand after failing to find jobs at home.⁸⁴ In a bid to address labour shortages induced by the pandemic, the Government of Thailand re-opened its border with Cambodia in February 2022 to resume migration as part of their MoU.⁸⁵ Due to Cambodia's geographic proximity and a relatively higher share of the population who are of working age (53%, compared to Thailand's 43%), it is likely that Cambodia would continue to be a sizable source of migrant workers for Thai businesses over the next 10 years.⁸⁶

Future outlook for lower-skilled migration due to climate change

Despite its gravity, climate change – in particular, slow-onset change in the form of rising sea levels, increasing soil salinity and biodiversity loss – has rarely been the primary motivator for people to migrate overseas. As the most climate-vulnerable populations in the region are heavily concentrated in primary activities and tend to have low average incomes, undertaking cross-border migration on a regular basis is expensive. In effect, climate change-induced migration over the next decade would continue to be predominantly internal (i.e. from rural to urban areas). However, the share of international migration is expected to rise, as rapidly urbanizing cities may face limitations in absorbing migrants from rural and coastal areas on a continual basis.

Over 50 per cent of the surveyed migrant workers report that people from their residential area in their home country are planning to migrate to another country in the future due to serious losses experienced from events like droughts, floods and land erosion.⁸⁷ Moreover, 76 per cent of the surveyed business executives report that their organizations are factoring the impacts of climate change on labour migration in their recruitment plans. Geographic proximity, social networks and cultural ties, and migration

costs are likely to be the dominant factors driving climate change-induced migration patterns, as demonstrated by the case studies.

4. TECHNOLOGY AND AUTOMATION IN THE WORKPLACE

It is important to distinguish between the labour-substituting and -complementing role of some technologies in order to understand the impact of disruptive technologies such as automation and robotics, predictive analytics, and the Internet of Things on migrant worker flows. While automation has the potential to entirely displace human workers, digitalization can transform the way companies operate, giving rise to new job roles. These opposite forces may, therefore, produce a more tempered effect on employment.

Over 65 per cent of surveyed migrants working in Singapore confirm that advanced technologies are being adopted on a large scale in their workplaces, with over 60 per cent of them confirming that COVID-19 has hastened this trend.

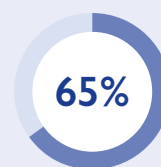


Figure 8 shows the density of industrial robots deployed in key destination countries in Asia in 2021. Estimates of the aggregate and sectoral impacts of automation on employment vary widely. ILO conducted a study in 2016 exploring the impact of automation in five Association of Southeast Asian Nations (ASEAN) countries that account for around 80 per cent of the group's workforce (Cambodia, Indonesia, the Philippines, Thailand and Viet Nam). It found that approximately 56 per cent of all jobs in those countries would be at high risk of labour displacement over the next couple of decades.⁸⁸ At the same time, a CISCO study, which modeled the positive and negative impacts of increased technology adoption, found that sectors like wholesale and retail, manufacturing, and construction would see the highest net new job growth.⁸⁹ Figure 9 illustrates automation progress in selected destination countries.

⁸³ According to the International Migrant Stock 2019 database of DESA (see footnote 3), Thailand received 62.9 per cent of Cambodian global migrants in 2019.

⁸⁴ "Cambodian Migrants Facing Lack of Jobs at Home Want to Return to Thailand", *Radio Free Asia*, 22 September 2021. Available at www.rfa.org/english/news/cambodia/migrant-laborers-09222021184759.html.

⁸⁵ Khmer Times, "First group of Cambodian workers under labor MoU enter Thailand", 3 February 2022. Available at www.khmertimeskh.com/501018277/first-group-of-cambodian-workers-under-labor-mou-enter-thailand/.

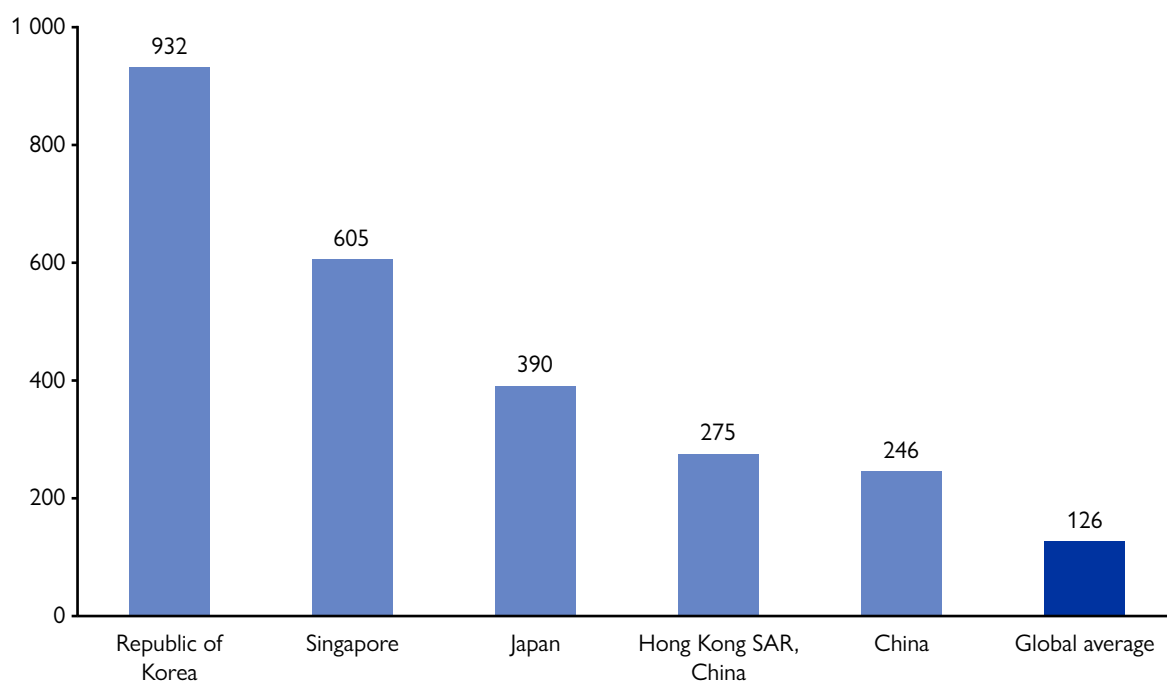
⁸⁶ World Bank, Age dependency ratio (% of working-age population). (2021). Available at <https://data.worldbank.org/indicator/SP.POP.DPND>.

⁸⁷ Economist Impact survey of migrant workers on the future of labour migration in Asia (survey for the current report).

⁸⁸ Jae-Hee Chang and Phu Huynh, "ASEAN in transformation: The future of jobs at risk of automation", ILO Bureau for Employers' Activities Working Paper No. 9 (Geneva, ILO, 2016). Available at www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---act_emp/documents/publication/wcms_579554.pdf.

⁸⁹ Oxford Economics and Cisco Systems, "Technology and the future of ASEAN jobs: The impact of AI on workers in ASEAN's six largest economies", report (London, Oxford Economics; Singapore, Cisco Systems, 2018). Available at www.cisco.com/c/dam/global/en_sg/assets/csr/pdf/technology-and-the-future-of-asean-jobs.pdf.

Figure 8. Robot density (number of industrial robots per 10,000 workers), 2021



Source: International Federation of Robotics, World Robotics 2021 Press Conference slide presentation, 28 October 2021 (livestream). Available at https://ifr.org/downloads/press2018/2021_10_28_WR_PK_Presentation_long_version.pdf.

Case study: Automation in Malaysian businesses and impact on migration

Automation landscape in Malaysia. Malaysia is among the ASEAN countries at the forefront of technology- and automation-induced disruption due to its high concentrations of labour-intensive manufacturing and service jobs. In fact, automation could displace up to 4.5 million workers in the country by 2030.⁹⁰ At the same time, the pace of automation has been slow in Malaysia: The ready availability of migrant workers at relatively lower wages has led to a depression in average wages in Malaysia and inertia among businesses to embrace automation and other technologies that involve higher costs.⁹¹

The COVID-19 pandemic brought back the spotlight on automation, as some sectors, such as manufacturing and plantations, have faced crippling labour shortages. The survey findings echo this, as almost 60 per cent of migrants working in Malaysia report that COVID-19 has accelerated the adoption

of advanced technologies. Policy efforts had also indicated a renewed push: In its 2020 budget, the Government of Malaysia committed to providing matching grants of up to MYR 5,000 (~USD 1,075) for small and medium enterprises to digitize their operations. For larger firms in the services and manufacturing sectors, the Government has extended its pre-existing tax incentives for automation until 2023.⁹² Almost 63 per cent of the surveyed business executives indicate accelerating adoption of automation and new technologies among some companies in their sector. Over 55 per cent of surveyed migrants working in Malaysia confirm that advanced technologies are being adopted on a large scale in their workplace.

Interaction between technology and automation adoption and migration in Malaysia. Data from the Malaysian Immigration Department shows that 1.98 million regular migrant workers were employed in Malaysia in 2019, constituting nearly a fifth of the workforce.⁹³ Migrant workers were relatively concentrated in the primary sector (farming, plantations and fisheries), manufacturing and construction.⁹⁴ The impact of

⁹⁰ Ee Huei Koh and Nimal Manuel, "Automation and adaptability: How Malaysia can navigate the future of work", McKinsey & Company article, 17 February 2020. Available at www.mckinsey.com/featured-insights/asia-pacific/automation-and-adaptability-how-malaysia-can-navigate-the-future-of-work.

⁹¹ Ang Jian Wei, Athreya Murugasu and Chai Yi Wei, "Low-skilled foreign workers' distortions to the economy", Bank Negara Malaysia article, March 2018. Available at www.bnm.gov.my/documents/20124/826852/AR+BA3+-+Low-Skilled+Foreign+Workers+Distortions+to+the+Economy.pdf.

⁹² Liew Chin Tong, "MySay: The Singapore factor in the Malaysian labour market", *The Edge Malaysia*, 20 February 2020. Available at www.theedgemarkets.com/article/mysay-singapore-factor-malaysian-labour-market.

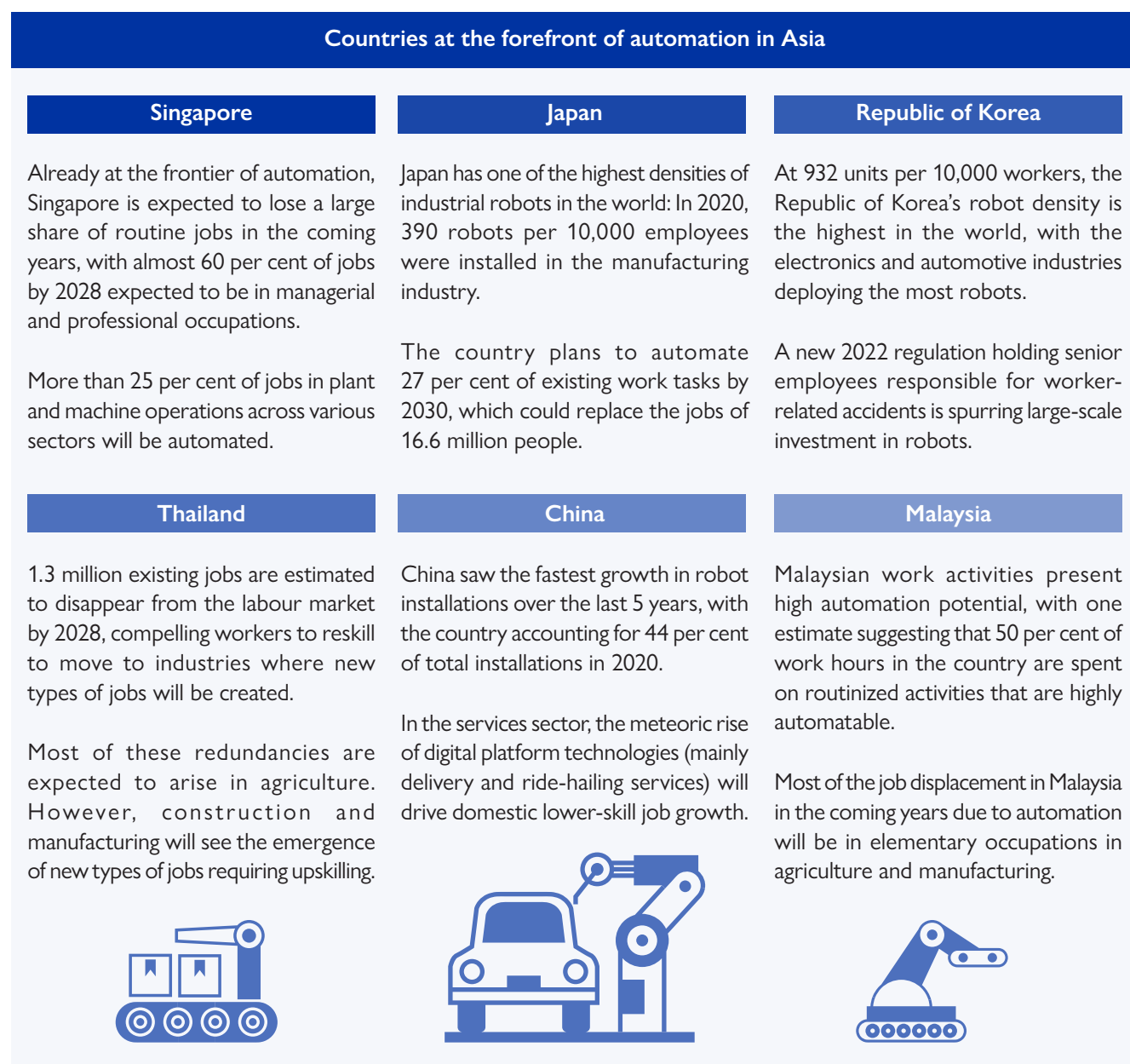
⁹³ ILO, "TRIANGLE in ASEAN – Malaysia", infosheet, 23 February 2018. Available at <https://rb.gy/h1tt6>.

⁹⁴ Wei et al., "Low-Skilled Foreign Workers' Distortions to the Economy" (see footnote 91).

technological advancements in Malaysian businesses on migrant workers over the next decade would vary by sector, but a more pronounced impact in the manufacturing and primary sectors is indicated by recent policy initiatives. For example, the Mechanisation and Automation Research Consortium of Oil Palm (MARCOP), a government–industry platform

to develop automation technologies for oil palm plantations launched in November 2021, aims to reduce dependence on human harvesters.⁹⁵ With a migrant worker share of 75 per cent, the next decade may see increasing numbers of migrant workers in this sector facing a choice between upskilling and changing occupations in Malaysia and returning to their origin

Figure 9. Technological progress in the workplace in selected Asian countries



Source:

1. Cisco Systems and Oxford Economics, “Technology and the future of ASEAN jobs” (see footnote 89).
2. International Federation of Robotics, “The new World Robotics 2020 Industrial Robots report shows a record of 2.7 million industrial robots operating in factories around the world”, 24 September 2020. Available at <https://ifr.org/news/record-2.7-million-robots-work-in-factories-around-the-globe/>.

⁹⁵ Government of Malaysia, Mechanisation and Automation Research Consortium of Oil Palm (MARCOP) home page. Available at <http://marcop.mpob.gov.my/>.

countries.⁹⁶ The Nepalese migration corridor to Malaysia, comprising around 500,000 migrant workers (2019),⁹⁷ may be particularly impacted by these technological changes. These workers – women, in particular – have been highly concentrated in the country’s manufacturing sector, rendering their jobs vulnerable to automation.⁹⁸

According to Anita Ghimire, Director of the Nepal Institute for Social and Environmental Research, Malaysian businesses would compare the cost of compensating migrant workers due to automation-based job losses with the cost of upskilling them in decisions around the inclusion of migrants in upskilling programmes. While global evidence indicates that upskilling costs are relatively higher,⁹⁹ long-term returns from upskilling the existing migrant workforce may result in businesses favouring upskilling existing workers. The survey results demonstrate this trend: All business executives in Malaysia-based companies plan to provide training/upskilling to lower-skilled migrant workers to operate new technologies or perform new types of tasks that may emerge as a result of automation. At the same time, half of these executives plan to reorient their hiring policies in favour of migrant workers with higher skill levels, while not retrenching current migrant workers. Further, almost 60 per cent of the surveyed migrant workers expected to receive training in the use of new technologies in the future.



Case study: Automation in Singaporean businesses and impact on migration

Automation landscape in Singapore. By 2028, almost 60 per cent of jobs in Singapore are expected to be in managerial and professional positions due to replacement of routine jobs by technology.¹⁰⁰ A regional technology leader confirms that COVID-19 lent further momentum to automation in Singapore, including for small businesses, retailers and hawkers. Over 65 per cent of surveyed migrants working in Singapore confirm that advanced technologies are being adopted on a large scale in their workplace, with over 60 per cent of them confirming that COVID-19 has hastened this trend.

Interaction between technology and automation adoption and migration in Singapore. Historically, the construction, manufacturing and services sectors in Singapore has relied heavily on migrant workers, with about 78 per cent of construction workers being migrants.¹⁰¹ Although the Government uses a variety of measures, including migrant worker levies and dependency quotas, to reduce dependence on lower-skilled migrant workers,¹⁰² migrant workers continue to be employed in significant numbers, as data from the Singaporean Ministry of Manpower shows.¹⁰³ A renewed push by the Government to businesses facing labour shortages to automate and digitize is expected to progressively reduce Singapore’s dependence on lower-skilled labour over the next decade.

Over the next decade, the aggregate number of migrant workers in Singapore may decline as the pool of available lower-skilled jobs keeps narrowing due to technology replacement in manufacturing and construction. Process innovations such as prefabrication may reduce the need for lower-skilled workers in the construction sector, as argued by the regional technology leader interviewed. Also, the Government announced in 2021 that it would provide up to 80 per cent financing to construction companies to adopt robotics and automation.¹⁰⁴ As demonstrated by the survey results, just 5 per cent of business executives in Singapore

⁹⁶ Datuk Dr. Ahmad Parveez Ghulam Kadir, “Addressing labour shortage in oil palm plantation sector”, *New Straits Times*, 27 October 2022. Available at www.nst.com.my/business/2022/10/844021/addressing-labour-shortage-oil-palm-plantation-sector.

⁹⁷ Seng-Guan Yeoh and Anita Ghimire, “Nepal–Malaysia migration corridor”, brief (Coventry, United Kingdom, Migration for Development & Equality, n.d.). Available at https://southsouth.contentfiles.net/media/documents/MIDEQ_Nepal-Malaysia_corridor_brief_v2.pdf.

⁹⁸ Monash University, “Understanding the gender dimensions of Nepali migrant work in Malaysia”, Monash University Malaysia article, 24 August 2021. Available at www.monash.edu.my/research/our-research/understanding-the-gender-dimensions-of-nepali-migrant-work-in-malaysia.

⁹⁹ Briony Harris, “Who should pay for workers to be reskilled?”, *World Economic Forum* article, 22 January 2019. Available at www.weforum.org/agenda/2019/01/who-should-pay-for-workers-to-be-reskilled-1/

¹⁰⁰ Oxford Economics and Cisco Systems, “Technology and the future of ASEAN jobs” (see footnote 89).

¹⁰¹ Rachel Phua and Chew Hui Min, “Can Singapore rely less on foreign workers? It’s not just about dollars and cents, say observers”, *CNA*, 9 June 2020. Available at www.channelnewsasia.com/singapore/singapore-foreign-workers-reliance-challenges-722001.

¹⁰² Singapore, Ministry of Manpower, Foreign Worker Quota and Levy section (2022). Available at www.mom.gov.sg/passes-and-permits/work-permit-for-foreign-worker/foreign-worker-levy.

¹⁰³ Singapore, Ministry of Manpower, “Foreign workforce numbers”, data set (2022). Available at www.mom.gov.sg/documents-and-publications/foreign-workforce-numbers (accessed 25 October 2022).

¹⁰⁴ Aineena Hani, “Singapore launches new initiative to encourage adoption of robotics & automation”, *OpenGov Asia* article, 10 September 2021. Available at <https://opengovasia.com/singapore-launches-new-initiative-to-encourage-adoption-of-robotics-automation/>.

plan to continue hiring migrant workers at the same skill levels. Over 42 per cent plan to replace current migrant workers with those with higher skill levels. Among the surveyed migrant workers, too, almost 81 per cent of those working in Singapore fear being replaced by technology in the future.

At the same time, certain jobs, especially within the services sector, may be hard to automate despite the availability of technology – for example, food and beverage services (which employ the largest number of migrant workers within the services sector in Singapore) and eldercare strongly rely on human interaction.¹⁰⁵ The lack of adequate space for installing robotic machines is also a common constraint for food and beverage businesses in Singapore.

Outlook for lower-skilled migration due to technology and automation

Over the next decade, automation would hurt workers in routine and manual jobs in Asia, such as operating machinery in a predictable environment, unless they are provided relevant skilling opportunities. Labour demand would grow mostly for non-routine jobs involving cognitive, social, and information and communications technology (ICT) skills, such as planning, design thinking, and managing processes and people.¹⁰⁶ The impact of this shift will potentially be greatest on unskilled workers, as upskilling them will require considerable financial and time costs.¹⁰⁷ Medium-skilled workers, on the other hand, may be able to transition better to roles that require greater use of technology (e.g. training a factory worker to perform lower-level programming) through upskilling.¹⁰⁸ Fifty-six per cent of the surveyed executives plan to hire more migrant workers with higher skill levels to help operate new technologies in the future. Meanwhile, 33 per cent plan to replace currently lower-skilled migrant workers with those who have higher skill levels. These technological shifts would also have gendered impacts, as women in Asia – particularly in South Asia and ASEAN – are overrepresented in lower-skilled occupations. At least 76 per cent of jobs in the automation-prone garment, textile and footwear industries

in South-East Asia employ women.¹⁰⁹ This long-term trend will potentially see large shares of women displaced from these jobs into less automation-prone sectors, such as services that rely on customer interaction (e.g. hospitality and tourism) and care work: in the case of the latter, due to the increased demand for care workers in ageing countries.

Another trend likely to buttress against the impact of technological disruption on job losses of migrant workers would be the rise of gig work in Asia. Platform technologies that deliver various types of services to consumers have received strong impetus in the wake of COVID-19 and acted as a cushion for the vast numbers of workers who lost their jobs. For instance, an estimate suggests that Bangladesh's gig workforce grew by 27 per cent in 2021.¹¹⁰ Similarly in India, a staggering 7.7 million workers are estimated to be engaged in the gig economy, with 31 per cent and 47 per cent of the jobs being lower and medium-skilled, respectively.¹¹¹

A sharp decline in overall employment due to technological shifts is unlikely in Asia. However, governments and businesses would need to make sizable investments in upskilling lower-skilled migrant workers to adapt to the changes, with a particular focus on women's inclusion in these investments.¹¹²

5. ECONOMIC TRANSFORMATION AND INFRASTRUCTURE DEVELOPMENT

Economic transformation is a continuous process characterized by the movement of labour and capital from lower- to higher-productivity activities. Typically, this involves moving economic growth dependence away from primary activities towards manufacturing and services. Such transitions are also accompanied by an expansion in public and private infrastructure, including power grid networks, ports, roads and highways, and telecommunications, among others. This section explores the interaction between countries' economic transformation and infrastructure development and lower-skilled labour migration.

¹⁰⁵ Low Youjin, "The Big Read in short: F&B operators' manpower conundrum – too few workers or too many eateries?", *Today*, 17 April 2022. Available at www.todayonline.com/big-read/big-read-short-fb-operators-manpower-conundrum-too-few-workers-or-too-many-eateries-1874381.

¹⁰⁶ ADB, *Asian Development Outlook 2018: How Technology Affects Jobs* (Mandaluyong City, 2018). Available at www.adb.org/publications/asian-development-outlook-2018-how-technology-affects-jobs#accordion-2-2.

¹⁰⁷ Will Baxter, "Thailand 4.0 and the future of work in the Kingdom", background note prepared for the national dialogue on the future of work in Thailand, 29 March 2017, Bangkok. Available at www.ilo.org/asia/events/WCMS_549062/lang--en/index.htm.

¹⁰⁸ *Ibid.*

¹⁰⁹ Liyana Hasnan, "Women's job under threat from AI", *The ASEAN Post*, 4 November 2019. Available at <https://theaseanpost.com/article/womens-jobs-under-threat-ai>.

¹¹⁰ BBF Digital, "Towards a self-employed economy: understanding the gig economy of Bangladesh", 1 June 2021. Available at <https://bbf.digital/towards-a-self-employed-economy-understanding-the-gig-economy-of-bangladesh>.

¹¹¹ India, National Institution for Transforming India (NITI) Aayog, "India's booming gig and platform economy", policy brief (New Delhi, 2022). Available at www.niti.gov.in/sites/default/files/2022-06/Policy_Brief_India%27s_Booming_Gig_and_Platform_Economy_27062022.pdf.

¹¹² OECD Southeast Asia Regional Programme, "Adapting to changing skill needs in Southeast Asia", discussion note presented at the OECD Southeast Asia Regional Forum (virtual meeting), 20 May 2021. Available at www.oecd.org/southeast-asia/events/regional-forum/OECD_SEA_RegionalForum_2021_Discussion_Note.pdf.

Historically, growth of the developed East Asian economies (the Republic of Korea; Singapore; Hong Kong SAR, China; and Taiwan Province of the People's Republic of China) was propelled by labour-intensive manufacturing and exports, especially in the 1970s and 1980s.¹¹³ For example, in the 1960s, Singapore moved from having high unemployment to acute labour shortages within a decade, owing to rapid industrialization and infrastructure development. As a result, not only were wages driven up, but also lower-skilled migrant workers were being admitted to fill the labour shortages.¹¹⁴

Currently, not all Asian countries are at the same stage of economic transformation. Whereas China, Malaysia and Thailand have been implementing ambitious plans towards higher-value productive activity and digitalization, emerging economies, such as Cambodia, Indonesia, Viet Nam and the Philippines, have been competing in the market for lower-value goods and services. To keep up with future needs, infrastructure development, including in transport, digital and health services, has been a central priority in most Asian countries' budgets. The outlook for lower-skilled migration in the context of ongoing economic transformation and infrastructure development is explored in the following case studies.

Case study: Economic transformation in Thailand and migration

Thailand's economic transformation landscape. Although Thailand's economy has successfully transitioned from being agriculture-dependent to one dependent on export-oriented manufacturing, it has found itself in a middle-income trap. In the decade between 2010 and 2019, real GDP growth in Thailand averaged 3.6 per cent, as against peers like

Indonesia (5.4%) and Viet Nam (6.9%).¹¹⁵ Its transition to higher-income status has been impeded by flagging industrial competitiveness, high concentrations of economic activity in lower-skill, lower-productivity jobs and inadequate skilled human capital. To address these roadblocks and move up the value chain, the Government of Thailand launched Thailand 4.0, an economic model based on new technologies, innovation and creativity. By scaling up the development of new sectors, including robotics, digital services and biofuels, the Thailand 4.0 plan aims to make transformative shifts in productive activity – for example, from traditional to higher-value services, from traditional to smart farming, and from importing sophisticated technology to producing it. A key growth engine in this economic plan has been the ongoing development of the Eastern Special Development Zone,¹¹⁶ an area-based development initiative that comprises building large-scale physical and digital infrastructure projects and creating dedicated zones for the targeted new sectors.

Thailand's economic transformation and the outlook for migration. Thailand relies heavily on migrants across its agriculture, construction, manufacturing, domestic work, fishing, seafood processing and services sector. In key exporting industries such as food and rubber production, migrant workers constituted up to half of the total workforce. In 2019, migrant workers contributed 4.3–6.6 per cent of Thailand's GDP and accounted for over 10 per cent of the workforce.¹¹⁷ As of 2021, Thailand hosted 2.1 million lower-skilled migrant workers from Cambodia, the Lao People's Democratic Republic and Myanmar.¹¹⁸ Migrant workers from Myanmar made up about 80 per cent of all migrants employed in Thailand's agricultural, fishing and manufacturing sectors.¹¹⁹

Given the high dependence of Thailand's export-led economy on lower-skilled migrant workers, a key question arose: What role would they play under the country's new economic transformation plan? The answer would directly impact Thailand's migration outlook over the next decade and beyond. A key challenge in realizing Thailand's economic vision is the dearth of skilled human capital – that includes both local and migrant workers. Not only has the enrolment of locals in tertiary education declined in recent years owing to population ageing,¹²⁰ but the quality of education offered by tertiary institutions has also suffered due to financing issues, among



As of 2021, Thailand hosted 2.1 million lower-skilled migrant workers from Cambodia, the Lao People's Democratic Republic and Myanmar.

¹¹³ Michael Sarel, *Growth in East Asia: What We Can and What We Cannot Infer* (New York, International Monetary Fund, 1996). Available at www.imf.org/external/pubs/ft/issues1/.

¹¹⁴ Chew Soon-Beng and Rosalind Chew, "Immigration and foreign labour in Singapore", *ASEAN Economic Bulletin*, 12(2):191–200 (1995). Available at www.jstor.org/stable/25770595.

¹¹⁵ Economist Intelligence, real GDP (% change pa) (2023). Available at <https://viewpoint.eiu.com/data> (accessed 25 October 2022).

¹¹⁶ Government of Thailand, Eastern Special Development Zone Act B.E. 2561, issued on 10 May 2018. Available at www.eeco.or.th/en/filedownload/1148/file_English%20version.

¹¹⁷ Tual Sawan Khai, "Migrant workers get a raw deal", *Bangkok Post*, 7 February 2022. Available at www.bangkokpost.com/opinion/opinion/2259927/migrant-workers-get-a-raw-deal.

¹¹⁸ Sai Sai, "We stand up for our labour rights", ILO Voices article, 8 February 2022. Available at <https://voices.ilo.org/stories/we-stand-up-for-our-labour-rights>.

¹¹⁹ Kiana Duncan, "In Thailand, Myanmar migrants' illicit unions fight to be heard", *Al Jazeera*, 30 May 2022. Available at www.aljazeera.com/economy/2022/5/30/in-thailand-burmese-migrant-workers-fight-to-organise.

¹²⁰ UNESCO Institute for Statistics, World Bank, School enrollment, tertiary (% gross) – Thailand (2021). Available at <http://data.uis.unesco.org/> (accessed 25 October 2022).

other factors.¹²¹ This directly impacts the availability of local workers primed for the future of work under Thailand 4.0.

Against this background, evidence suggests that governments and businesses will need to undertake upskilling initiatives to prepare local workers for new types of job roles and skills. Examples of new roles may include sales representatives selling customized robots, skilled technicians, programmers and production/quality control administrators; examples of new skill types may include data analysis, logical thinking, problem solving and service-mindedness.¹²² However, Thailand's demographic challenge of a rapidly ageing population is expected to shrink the workforce by 11 per cent by 2040.¹²³ Hence, even with the upskilling of local workers, the declining workforce suggests that Thailand may not be able to significantly reduce its reliance on migrant workers over the next decade.^{124, 125}

Recent policy actions are indicative: In July 2022, the Government approved a labour management plan to extend the stay of migrant workers, including irregular migrant workers, from four countries until February 2025,¹²⁶ as long as employers regularized their status.¹²⁷ The current study's survey results suggest that migrant workers would be a part of upskilling initiatives organized by businesses: All surveyed Thai business executives report having plans to provide training/upskilling to migrant workers employed with them to prepare them for future tasks at work. However, there is broad consensus among executives that while it may be easier to future-proof workers with low to medium skill levels, unskilled workers may be left out.¹²⁸ By implication, migrant workers concentrated in agriculture and fisheries may need to make a choice between learning new skills and returning to their origin countries.

Case study: Infrastructure development in Malaysia and migration

Malaysia's infrastructure landscape. Malaysia's 2023 infrastructure budget is ambitious: It has allocated USD 20.43 billion for 7,615 development projects, representing more than a 25-per-cent increase over the previous year's budget.¹²⁹ Transport infrastructure projects, including the completion of the 2,000-km Pan-Borneo Highway (65% complete as of September 2022), new international transport links with neighbouring countries, existing road maintenance and upgrade works, and rural connectivity represents a large chunk of these development works.¹³⁰ The direct and indirect impacts of decarbonization and net-zero transition goals are also expected to result in new job growth in the coming years, with 75 per cent of the surveyed executives say that the trend applies to their sector.

Malaysia's infrastructure plans and the outlook for migration. Migrant workers constitute about 20 per cent of the Malaysian labour force, with a little over 2 million workers employed across Malaysia's manufacturing, construction, plantations and services sectors in 2020.¹³¹ 2021 data from Malaysia's Immigration Department shows that the construction sector alone employs 429,552 migrant workers, with Indonesians representing the highest share (59%).¹³² Over the next 10 years, the country is estimated to need over 1 million construction workers each year to support the government's infrastructure plans.¹³³ As demonstrated by the survey results, over 70 per cent of migrant workers in Malaysia report awareness about an increase in the number of new infrastructure projects in the country. Over 85 per cent express a willingness to take up new jobs created due to these infrastructure projects.

¹²¹ Richard Yarrow, "Thai economy stuck in an aging middle-income trap", *Asia Times*, 24 October 2022. Available at <https://asiatimes.com/2022/10/thai-economy-stuck-in-an-aging-middle-income-trap/>.

¹²² Sirikorn Rochanasak, Rattana Klinjuy, Samanit and Vasant Nilamai, "Essential skills for Thailand 4.0: The importance of education corresponded to employment scenarios, and building self-competent immunity pertaining to technological disruptions", *Veridian E-Journal, Silpakorn University (Humanities, Social Sciences and Arts)*, 12(3):68–85 (May–June 2019). Available at <https://he02.tci-thaijo.org/index.php/Veridian-E-Journal/article/view/180012>.

¹²³ Dana Ladek, "Op-ed: Migrants – a catalyst for Thailand 4.0", IOM website news article, 20 December 2017. Available at <https://thailand.iom.int/news/op-ed-migrants-catalyst-thailand-40>.

¹²⁴ World Bank, "Age dependency ratio, old (% of working-age population) – Thailand", data set (2019). Available at <https://data.worldbank.org/indicator/SP.POP.DPND.OL?locations=TH>.

¹²⁵ United Nations Country Team in Thailand, Thailand Migration Network Working Group terms of reference (2020). Available at https://migrationnetwork.un.org/sites/g/files/tmzbd416/files/docs/un_migration_network_working_group_-_tor_-_feb2020.pdf.

¹²⁶ The four countries are Cambodia, Lao People's Democratic Republic, Myanmar, and Viet Nam. ILO, "TRIANGLE in ASEAN quarterly briefing note: ASEAN", April–June 2022. Available at www.ilo.org/asia/publications/WCMS_614378/lang--en/index.htm.

¹²⁷ ILO, "TRIANGLE in ASEAN quarterly briefing note: Thailand", April–June 2022. Available at www.ilo.org/asia/publications/WCMS_614378/lang--en/index.htm.

¹²⁸ Baxter, "Thailand 4.0 and the future of work in the Kingdom" (see footnote 107).

¹²⁹ M.J. Woof, "Malaysia 2023 infrastructure budget set", *World Highways*, 24 October 2022. Available at www.worldhighways.com/wh8/news/malaysia-2023-infrastructure-budget-set.

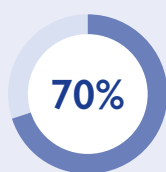
¹³⁰ "EPU: Development allocation of RM95 billion in budget 2023 to support objectives of 12MP", *Business Today*, 9 October 2022. Available at www.businesstoday.com.my/2022/10/09/epu-development-allocation-of-rm95-billion-in-budget-2023-to-support-objectives-of-12mp/.

¹³¹ ILO, "TRIANGLE in ASEAN quarterly briefing note: Malaysia", January–June 2022. Available at www.ilo.org/asia/publications/WCMS_614378/lang--en/index.htm.

¹³² S. Laxmi, "Migrant workers: The dilemma facing the construction industry", *Focus Malaysia*, 18 April 2021. Available at <https://focusmalaysia.my/migrant-workers-the-dilemma-facing-the-construction-industry/>.

¹³³ Noorasiah Sulaiman, Rahmah Ismail, Nasir Saukani and Bawani Lechumanan, "Skilled labour demand in the Malaysian construction sector", *Journal of Sustainability Science and Management*, 16(4):236–252 (June 2021). Available at <https://jssm.unt.edu.my/wp-content/uploads/sites/51/2021/07/18-16.4.pdf>.

The construction and manufacturing sectors of Malaysia – both crucial for infrastructure development, accounted for around 70 per cent of business applications for the recruitment of new migrant workers after the reopening of applications post-COVID-19 pandemic.



Despite extensive reliance of the economy on migrant workers, the Government of Malaysia has introduced policies from time to time aimed at reducing the country's dependence on these workers, in favour of local employment.¹³⁴ Most recently, the Twelfth Malaysia Plan (2021–2025) stipulates that the total share of migrant workers should be restricted to 15 per cent of the total labour force.¹³⁵ These policies are incongruous with the labour shortages plaguing the plantations, construction and manufacturing sectors, among others. When business applications for the recruitment of new migrant workers were reopened by the Government of Malaysia, as many as 475,678 applications were received, although just 2,605 were approved by the end of the first two months.¹³⁶ The construction and manufacturing sectors – both crucial for infrastructure development, accounted for around 70 per cent of the applications. Delays in approval, in turn, interrupted progress of Malaysia's key infrastructure projects.

Businesses have been unable to supplant their migrant worker employees with local workers, owing to their unwillingness to work in those sectors.¹³⁷ Due to low wages and the 3D (dirty, dangerous and demeaning) nature of certain kinds of work, local workers instead prefer to migrate to destinations with higher wages, especially Singapore. Over 63 per cent of the surveyed migrant workers in Malaysia report that local workers are not interested in the types of jobs they do. In a bid to expand the skills base of the local population, the

Government of Malaysia has not only outlined measures to improve the national education system, but has also introduced plans to address the skills mismatch in the labour market and create a labour force prepared for high-skilled jobs.^{138,139} These efforts have not yielded results so far, as seen from the persistently high demand for migrant workers: Data from October 2022 shows that the total demand for migrant workers (1.8 million workers), including existing workers, plus newly approved workers, had almost been met.¹⁴⁰ The survey results also demonstrate a continued preference of businesses to hire migrant workers: Just 6 per cent of the surveyed business executives based in Malaysia plan to replace migrant workers with higher-skilled local workers in the face of increasing automation. Higher costs of both automation and hiring local workers fuel this preference.

Outlook for lower-skilled migration due to economic transformation and infrastructure development

The case studies of Thailand and Malaysia are indicative of the vital role migrant workers are likely to continue playing in the transformations of these countries into higher-income, higher-value economies. The demographic and skilling challenges in these countries, together with the unwillingness of local workers to take up jobs migrants are traditionally employed in, will continue to fuel the demand for migrant workers over the next decade. Government-to-government agreements for the protection of migrant workers' rights, such as the recent MoU between Malaysia and Indonesia (April 2022), will play a critical role in encouraging migration.¹⁴¹

Emerging economies, including Bangladesh, Cambodia, India and Indonesia, that send high shares of their migrants to such countries undergoing shifts towards becoming higher-value economies, are projected to have strong manufacturing and services growth in the future. At any rate, they are likely to continue to be sources of lower-skilled migrant workers: Income, employment and demographic differences between these countries will be key drivers of this migration.

¹³⁴ Ibid.

¹³⁵ Malaysia, Prime Minister's Department – Economic Planning Unit, Twelfth Malaysia Plan, 2021–2025. Available at <https://rmke12.epu.gov.my/en>.

¹³⁶ Dhesegaan Bala Krishnan, "Speed up foreign worker approval", *New Straits Times*, 7 April 2022. Available at www.nst.com.my/news/nation/2022/04/786629/speed-foreign-worker-approval.

¹³⁷ Malaysia, Department of Statistics, *Labour Market Review (Second Quarter 2022)* (Putrajaya, Malaysia, 2022). Available at www.dosm.gov.my/v1/uploads/files/1_Articles_By_Themes/Labour%20Market%20Review/10.%20LMR%20Q2%202022/Labour%20Market%20Review%20Q2%202022.pdf.

¹³⁸ Malaysia, Economic Planning Unit, Twelfth Malaysia Plan, 2021–2025 (see footnote 135).

¹³⁹ Harizah Kamel, "Govt allocates RM400b in 12MP for sustainable economic growth", *The Malaysian Reserve*, 28 September 2021. Available at <https://themalaysianreserve.com/2021/09/28/govt-allocates-rm400b-in-12mp-for-sustainable-economic-growth/>.

¹⁴⁰ "Govt has approved quota of 541,315 foreign workers as of Sept 26", *The Edge Markets*, 1 October 2022. Available at www.klsescreener.com/v2/news/view/1050501 (republished).

¹⁴¹ "Indonesia, Malaysia to start work on travel corridor", *The Jakarta Post*, 18 October 2021. Available at www.thejakartapost.com/world/2021/10/18/indonesia-malaysia-to-start-work-on-travel-corridor.html.

SECTION III: CONCLUSION AND RECOMMENDATIONS

The regional outlook for the next decade concludes that lower-skilled labour migration in Asia will persist. As the report, *Spotlight on Labour Migration in Asia*, pointed out, migration dynamics are shifting due to various factors. While automation may alter the nature of supply and demand for certain skills, it will not significantly reduce migration. Moreover, longer-term income convergence between countries will not shift current migration patterns over the next decade, as income differentials will remain and destination countries experiencing the ageing trend will continue to depend on origin countries to meet their working population requirements. Climate change will likely contribute to an increase in migration, with due consideration to geographic proximity, social networks and cultural ties, and migration costs.

These trends may not necessarily occur in isolation. A migrant worker deciding to migrate from their country of origin due to climate change-induced job losses may access a job under an infrastructure project in an ageing destination country that pays higher wages than they could earn in their origin country. However, the worker may need to undergo training to work with a new technology on the job. This situation illustrates the interplay of the key migration drivers identified in this report.

Although these migration drivers have been providing gradual impetus to labour mobility since after the COVID-19 pandemic, existing gaps in migration governance and business responsibility for the realization of safe, orderly and regular migration persist and need to be addressed urgently. While migration flows will continue to persist, the benefits will be contingent on a number of factors. A conducive policy environment, simplified and cost-effective processes, provisions for safety and psychosocial support, and initiatives to match demand with supply, particularly those addressing migrant workers' skill gaps likely to emerge over the next decade as technological changes get entrenched in workplaces, will determine the benefits, among other factors. To this end, key focus areas for policymakers and the private sector are described in this section.

1. Provisions for skill-recognition of migrant workers.

Migrant workers often face a mismatch between the skills criteria upon which they are evaluated and provided with work permits, and the jobs they work in – resulting in a form of “underemployment” – working below their skill levels and/or qualifications (as highlighted, for example, in the ageing trend subsection). Origin and destination countries should align their skills recognition tools and systems. ILO Human Resources Development Recommendation, 2004 (No. 195) recommends special provisions to ensure the recognition and certification of skills and qualifications of migrant workers. Signing mutual recognition agreements covering the relevant job categories is a way to enable this. An example of this for higher-skilled job categories is the mutual recognition agreements (MRAs) signed by ASEAN member States starting from 2005.¹⁴² The agreements indicate the skills or experience that professionals need to have certified in order to register and work in another country of the region. The identification of the requirements is carried out by committees established for each profession. MRAs exist for eight professional categories, including nurses.¹⁴³

2. Mainstreaming migration and climate vulnerability considerations as an adaptation strategy in relevant policy frameworks for climate change.

Climate change-induced migration is expected to rise, as evident from the case studies and survey results. Over 50 per cent of migrant workers report that people from their country of origin are planning to migrate to another country due to serious losses experienced from events like droughts, floods and land erosion. To address potential forced and irregular migration due to climate change, governments in countries prone to climate change should incorporate migration as an adaptation strategy in policy frameworks for disaster management or post-disaster recovery efforts. The Government of Vanuatu, for example, has integrated human mobility considerations in its national climate change adaptation and disaster risk reduction planning.¹⁴⁴ The case study of Bangladesh highlights the additional vulnerability of women-headed households in the form of the unequal burden that they bear as part of climate adaptation, further emphasizing the need for governments to prioritize such households as a part of their disaster risk reduction initiatives.

¹⁴² ILO, *How to Facilitate the Recognition of Skills of Migrant Workers: Guide for Employment Services Providers* (second edition, Geneva, 2020). Available at www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_748721.pdf.

¹⁴³ Ibid.

¹⁴⁴ IOM, “Climate change and migration in vulnerable countries: A snapshot of least developed countries, landlocked developing countries and small island developing States”, report (Geneva, 2017). Available at https://publications.iom.int/system/files/pdf/climate_change_and_migration_in_vulnerable_countries.pdf.

3. Preparing migrant workers for the future of work.

The outlook for the technology and automation trend suggests that most destination countries, to varying degrees, are embracing technological shifts in their operations. The survey findings support this trend, with 55 per cent of the surveyed executives planning to hire more migrant workers with higher skill levels to help operate new technologies in the future. Meanwhile, 33 per cent plan to replace currently lower-skilled migrant workers with those who have higher skill levels. Similarly, the ageing trend points to a prominent role for migrant workers in the care economy in ageing countries, including in health-care services, eldercare and childcare: 84 per cent of the surveyed migrant workers report awareness about an increase in jobs involving home eldercare.

To address changing skill requirements and enable the transition to non-routine jobs involving cognitive, social and ICT skills, such as planning, design thinking and managing processes and human resources (as highlighted in the technology and automation trend subsection),¹⁴⁵ destination and origin countries need to coordinate efforts, including through the sharing of labour market information and forecasts, to match the demand and supply of skills for migrants to be productively employed. As technological shifts will have gendered impacts,¹⁴⁶ gender-focused reskilling and upskilling efforts will be needed to enable a shift to high-demand sectors such as care work. In parallel, governments of origin and destination countries should revisit existing policies and regulations on highly feminized sectors, such as health care and domestic work, to ensure better protection and benefits for women migrant workers, especially those employed in domestic work – the lowest paying category of care work.

Developing bilateral agreements whereby destination countries periodically announce their labour needs by sector and skill level is a potentially effective arrangement. Governments in origin countries can equip their workers with the requisite skills pre-migration. This type of migration can streamline migrant workers' supply and minimize inefficiencies. Japan's SSW Programme, as highlighted in the ageing trend subsection, is an illustration of this approach.

4. Rebalancing the cost burden of migration away from migrant workers to employers.

The Employer Pays principle, endorsed by the Leadership Group for Responsible Recruitment,¹⁴⁷ states that recruitment costs should not be borne by workers, but by employers. In practice, however, migrant workers face high upfront costs during the migration process, including, but not limited to, visa and documentation fees, agency/broker fees and travel costs. These factors often lead to debt and exacerbate migrants' financial burden over the longer term. The case study of Bangladesh, in discussing income differentials as a migration driver, highlights this financial burden. Around half of the surveyed migrants report not being able to repay their migration-related loans within one year, while 24 per cent took more than two years to do so. *ASEAN Migration Outlook* highlights high upfront costs as one of the key factors suppressing regular migration.¹⁴⁸ Governments, in both origin and destination countries, would need to review and implement policies and laws to make it a norm for employers to cover recruitment fees and related costs. Introducing ethical recruitment as a part of migration policy, as done by the Philippines, is an example.¹⁴⁹

5. Future preparedness and mitigation by integrating migrant workers in crisis preparedness and response.

As language has often been a barrier, disseminating information about crises through multiple languages would ensure effective response and adequate cooperation from migrant workers.¹⁵⁰ Governments can also leverage support from the private sector to distribute information materials to reach all populations. Contingency plans should factor in the personal security and health-related needs of women. Furthermore, emergency staff across all relevant response functions should be trained in cultural diversity, equipping them to implement migrant-centred and -friendly response in times of crisis. The Republic of Korea, for example, made access to free COVID-19 testing and treatment available to informal migrant workers, with

¹⁴⁵ ADB, *Asian Development Outlook 2018* (see footnote 106).

¹⁴⁶ Hasnan, "Women's jobs under threat from AI" (see footnote 109). Available at <https://theaseanpost.com/article/womens-jobs-under-threat-ai>.

¹⁴⁷ ILO, "General principles and operational guidelines for fair recruitment and definition of recruitment fees and related costs", Fair Recruitment Initiative brochure, 22 May 2019. Available at www.ilo.org/global/topics/fair-recruitment/WCMS_536755.

¹⁴⁸ ASEAN, *ASEAN Migration Outlook* (see footnote 13).

¹⁴⁹ Rio N. Araja, "Cayetano: Migrant Workers Act to ensure 'ethical recruitment'", *Manila Standard*, 9 January 2022. Available at <https://manilastandard.net/news/314031861/cayetano-migrant-workers-act-to-ensure-ethical-recruitment.html>.

¹⁵⁰ Bertrand Pauver, John Twigg and Silvio Sagramola, "Migrants, refugees, asylum seekers: Inclusion in disaster preparedness and response", analysis (Lisbon, Council of Europe, 2016). Available at <https://reliefweb.int/report/world/migrants-refugees-asylum-seekers-inclusion-disaster-preparedness-and-response>.

partial income support during treatment. Hospitals had no mandate to ask about a migrant's (legal) status or report their details to immigration and labour authorities.¹⁵¹

6. Strengthening inclusion in social security, physical health and psychosocial support services. Existing social security systems in destination countries cover regular migrant workers to varying degrees, as summarized in *ASEAN Migration Outlook*.¹⁵² However, destination countries need to make concerted efforts to enable migrants to avail protections and services when needed. Key gaps include migrants' lack of awareness of the availability of benefits and social security support, excessive working hours (in the case of some domestic workers, even mobility restrictions), lack of inclusion of informal sectors in social security schemes (e.g. domestic work), and difficulties while accessing services (e.g. language and cultural barriers) that prevent them from prioritizing their health. The case study of Japan, in discussing the ageing trend, highlights the challenges faced by caregivers in long-term settings.

COVID-19 has put a spotlight on the physical health and social challenges faced by migrant care workers.¹⁵³ In a post-pandemic environment, baseless allegations about migrant workers being disease carriers have also fuelled xenophobia, leading to increased harassment. In fact, lack of access to decent living conditions and the inability to isolate were key factors in increasing migrants' vulnerability

to COVID-19 (only 37.3 per cent of the surveyed migrant workers received any type of housing support from their employers upon migrating). Providing migrants with health coverage and access to better living conditions would contribute to overall health and social integration. Employers can play a facilitative role in providing such support.

Importantly, destination countries must incorporate the unique needs of women (e.g. provisions for maternity leave) in their migration policies and regulations.

Considering how the key trends might affect migration patterns in the future, addressing urgent gaps, such as the high migration-related costs and debt burden borne by migrant workers; the inadequate flexibility of destination countries' migration systems; and migrant workers' poor access to social security and public services in destination countries, compromised living conditions and lack of occupational safety would contribute to a resilient migration ecosystem in Asia. In addition, a forward-looking area of focus for governments of both origin and destination countries and businesses in destination countries is preparing to address migrant workers' skill gaps likely to emerge in the future as technological changes get entrenched in workplaces. Finally, a key priority for governments of both origin and destination countries is the comprehensive integration of migrant workers in their crisis response strategies.

¹⁵¹ World Bank, "Potential responses to the COVID-19 outbreak in support of migrant workers", note – "Living Paper" version 10, 19 June (Washington, D.C., 2020). Available at <https://documents1.worldbank.org/curated/en/428451587390154689/pdf/Potential-Responses-to-the-COVID-19-Outbreak-in-Support-of-Migrant-Workers-June-19-2020.pdf>.

¹⁵² ASEAN, "Comparative study on laws and policies in the management of migrant workers in ASEAN", Enhanced Regional EU–ASEAN Dialogue Instrument (E-READI) report (Jakarta, ASEAN, 2021). Available at https://asean.org/wp-content/uploads/2021/08/Comparative_Study_Migrant_workers1.pdf.

¹⁵³ Amelita King-Dejardin, *The Social Construction of Migrant Care Work: At the Intersection of Care, Migration and Gender* (Geneva, ILO, 2019). Available at www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_674622.pdf.

APPENDICES

APPENDIX A: SURVEY SAMPLE DESIGN AND METHODOLOGY FOR THE SURVEYS ON THE FUTURE OF LABOUR MIGRATION IN ASIA

Two Asia-based online surveys of 100 business executives and 150 migrant workers were conducted by Economist Impact to complement findings from desk research on the future of migration through the lens of the fundamental migration drivers. The surveys were aimed at understanding the reality on the ground and filling information gaps where data were scarce.

Sample design

The business executives were selected from six key destinations: Japan, Malaysia, Republic of Korea, Singapore, Thailand and Hong Kong SAR, China. They represented organizations across six sectors: agriculture and food, care work, construction, hospitality, manufacturing, and retail. The executives included a mix of C-suite members, managing directors (or equivalent), directors (or equivalent) and senior human resource managers (or equivalent), with 40 per cent of surveyed executives being C-suite members.

The migrant workers participating in the survey were selected from Bangladesh, Cambodia, India, Indonesia, Nepal, the Philippines and Viet Nam. These workers belonged to the same six sectors to which the business executives belonged and worked across the same set of destinations from where the business executives were selected.

Sampling methodology

Both surveys were sampled using an online approach where respondents were drawn among individuals who had voluntarily opted into joining a panel for research purposes. Only respondents who passed screening questions based on the targeted respondent profiles were allowed to participate. The survey questionnaires were translated into native languages as needed.

1. Sampling criteria – Business executives' survey

The business executives were selected based on the following criteria:

- Located in a country or area in Asia which was the same as where their organization employed migrant labour
- Working as a director or equivalent, or above, and knowledgeable in issues relating to the employment of migrant labour in their organization
- Working in a sector known for employing low-wage migrants
- Based in a range of small, medium and large organizations (Respondents from microenterprises (less than 10 employees) were not included.)

2. Sampling criteria – Migrant workers' survey

The migrant workers were selected based on the following criteria:

- Originating from a country or area in Asia
- Working in an Asian country or area that is not their country or area of origin
- Not educated above a college/university/technical degree
- Working in a sector that is known for employing low-wage migrants

APPENDIX B: QUESTIONNAIRE – BUSINESS EXECUTIVES' SURVEY

Screening and profiling questions

D1. In which country or area is your business/organization based?

[Only Asian countries or areas qualify.]

D2. Which of the following best describes your title? Please select one.

- A. Chief Human Resource Officer (CHRO) or equivalent
- B. Senior Human Resource Manager or equivalent
- C. Chief Executive Officer (CEO) or equivalent
- D. Chief Operations Officer (COO) or equivalent
- E. Organization's Diversity, Equity and Inclusion (DEI) Committee member or equivalent
- F. Other C-level executive – *Please specify.*
- G. Managing Director/Executive Vice-President/Senior Vice-President
- H. Director/Vice-President or equivalent
- I. Manager – *Exit.*
- J. Other – *Exit.*

D3. What is your organization's primary sector? Please select one.

- A. Agriculture and food
- B. Construction
- C. Hospitality
- D. Manufacturing
- E. Retail
- F. Care (e.g. health care, eldercare, nursing homes)
- G. Other – *Exit.*

D4. To the best of your knowledge, how many people does your organization employ? Please select one.

- A. Less than 10 – *Exit.*
- B. 11–50
- C. 51–250
- D. 251–1,000
- E. Greater than 1,000
- F. I do not – *Exit.*

D5. How familiar are you with issues relating to the employment of migrant workers at your organization?

Please select one.

- A. Very familiar
- B. Somewhat familiar
- C. Not at all familiar – *Exit.*
- D. My organization does not employ migrant workers. – *Exit.*

Content questions

C1. Which of the following countries provide the largest share of migrant workers in your organization's workforce? Please select up to three.

- A. Bangladesh
- B. Cambodia
- C. China
- D. India
- E. Indonesia
- F. Lao People's Democratic Republic
- G. Malaysia
- H. Mongolia
- I. Myanmar
- J. Nepal
- K. Pakistan
- L. The Philippines
- M. Sri Lanka
- N. Thailand
- O. Viet Nam
- P. Other – Please specify.

C2. Can you provide an estimate of the share of migrant workers in your organization (aggregating all job functions)?

- A. Less than 20%
- B. 20%–40%
- C. 41%–60%
- D. 61%–80%
- E. 81%–100%

C3. What are the key reasons for your organization for recruiting migrant workers? Please select up to two.

- A. It is more cost-effective compared to hiring local workers.
- B. It is more cost-effective compared to adopting automation.
- C. Migrant workers tend to be more productive as compared to local workers.
- D. Local workers are not interested in these types of jobs.
- E. We want to be seen as a diverse and inclusive organization.
- F. Other – Please specify.

C4. Which of the following applies to your organization?

- A. I expect to see a decline in the number of migrant workers coming from lower-income countries in the future.
- B. I expect the number of migrant workers coming from lower-income countries to remain the same in the future.
- C. I expect to see a rise in the number of migrant workers from lower-income countries in the future.
- D. Not sure/Cannot say.

C5. In the coming years, do you foresee an increase in income/wages for workers in your industry?

- A. Yes, for both local and migrant workers.
- B. Yes, but for local workers only.
- C. Yes, but for migrant workers only.
- D. No.
- E. Not sure/Cannot say.

C6. Do migrant workers ask for salary advances (or loans) from your organization?

- A. Yes, frequently.
- B. Yes, but rarely.
- C. No.
- D. We do not have such provisions.

C7. If you selected either option A or B in the previous question, please answer: What are the common reasons that migrant workers ask for salary advances (or loans)?

- A. Repayment of loans to migrate
- B. Use for settling in the destination country or area
- C. Others
- D. Not sure/aware

C8. In your view, which of the following statements concerning automation and the use of new technologies are applicable to your industry?

- A. Many companies in my industry are accelerating their adoption of automation and new technologies.
- B. Some companies in my industry are accelerating their adoption of automation and new technologies.
- C. The adoption of automation and new technologies in my industry is slow-paced.
- D. Automation does not have a strong use in my industry.
- E. Automation and new technologies are not relevant to my industry.
- F. Not sure/Cannot say.

C9A. In the face of technology and automation, how does your organization plan to approach the hiring of migrant labour in the coming years?

- A. We plan to continue hiring migrant workers with the same skill levels.
- B. We plan to hire more migrant workers with higher skill levels to help operate new technologies, but will also continue to employ the current migrant workers.
- C. We plan to replace current-skill-level migrant workers with higher-skill-level migrant workers.
- D. We plan to replace current-skill-level migrant workers with higher-skill-level local workers.
- E. None of the above statements is applicable to my organization.
- F. Do not know/Not sure.

C9B. If you selected either A or B in the previous question, please answer: Does your organization plan to provide training/upskilling to lower-skilled migrant workers to operate new technologies or to do new types of tasks that may emerge as a result of automation?

- A. Yes, we are already training them.
- B. Yes, we plan to provide the required training when the need arises.
- C. No, we will change our hiring requirements to recruit only those migrant workers with the necessary skills.
- D. Do not know/Not sure

C10. Which of the following trends is applicable to your industry? Please select all that apply.

- A. New types of service jobs requiring lower- or semi-skilled migrant workers are increasing in my industry (e.g. due to ‘servicification’ in manufacturing).
- B. My industry will see new job growth in the coming years through either direct or indirect impacts of decarbonization and net-zero transition goals in the wider economy (e.g. through the manufacture of renewable energy products).
- C. My industry will see new job growth in the coming years through either direct or indirect impacts of infrastructure development in the wider economy (e.g. through construction, manufacturing and logistics-related needs).
- D. My industry is witnessing a shift in resources (including labour) from lower- to higher-productivity activities, and this may decrease the demand for lower-skilled migrant workers in favour of higher-skilled workers.
- E. Organizations in my industry are increasingly emphasizing on strengthening their local and regional supply chains, which will create new local jobs in my industry and the Asian region.
- F. None of the above.
- G. Not sure/Cannot say.

C11A. Is your industry encountering local labour shortages due to an ageing workforce?

- A. Yes, and the shortages of local labour are acute.
- B. Yes, there is some shortage, but it is not acute.
- C. There is no shortage of local labour.
- D. Not sure/Cannot say.

C11B. If you selected either option A or B in the previous question, please answer: To the best of your knowledge, how is your industry responding to the local labour shortage and which responses have been the most effective in filling labour gaps? Please tick all responses that apply and rate their effectiveness.

Industry responses to labour shortages created by an ageing workforce	Response applicable? (Yes/No)	Effectiveness		
		Not effective	Somewhat effective	Very effective
A. My industry is increasingly allowing senior employees to retire later than the stipulated age.				
B. My industry is targeting higher recruitment of new senior workers.				
C. My industry is targeting higher recruitment of women.				
D. My industry is investing more in automation to reduce the need for labour.				
E. My industry is planning to rely more on migrant workers to fill the labour shortages.				
F. Not sure/Cannot say.				

C12. The impacts of climate change (e.g. floods, land erosion and droughts) are increasingly pushing many workers in vulnerable countries [or areas] to migrate overseas. Is your organization considering recruiting migrant workers who have to migrate due to such situations?

- A. Yes, we are factoring this into future recruitment plans.
- B. No, we are not factoring this into future recruitment plans.
- C. Not sure/Cannot say.

C13. How do you anticipate your government's migration policy will change in the coming years for the recruitment and employment of lower-skilled migrant workers?

- A. The government's migration policy will become more welcoming towards the recruitment and employment of migrant workers.
- B. The government's migration policy will become more stringent and less welcoming towards the recruitment and employment of migrant workers.
- C. I do not expect any shift in the government's migration policy.
- D. Not sure/Cannot say.

C14. To the best of your knowledge, which of the following stakeholders play an active and important role in your country or area in regard to migration governance? Select all that apply.

- A. Government (by setting migration policy and establishing governance frameworks and coordination mechanisms)
- B. Private sector (by cooperating with the government on required assistance regarding migration governance)
- C. Multilateral agencies (by working on various aspects of migrant worker welfare and assisting governments in addressing gaps)
- D. Civil society (by contributing to migrant worker welfare and integration)
- E. Workers' organizations and trade unions (by advocating for the rights and entitlements of workers, including migrant workers)
- F. None of the above
- G. Not sure/Cannot say

C15. What forms of protection and benefits did your organization provide to migrant workers during COVID-19?

Please select all that apply.

- A. Physical and mental health-related support (e.g. providing PPE materials and/or health information, facilitating access to medical care if needed, referring workers to counsellors)
- B. Social security access (e.g. taking steps towards regularizing workers, facilitating worker access to health and unemployment insurance, and COVID-19-specific benefits)
- C. Workplace reorganization, to ensure the health and safety of migrant workers in the workplace
- D. Housing reorganization, to ensure that migrant workers live in safe conditions, with access to essential amenities
- E. Assistance for migrant workers to return to their home countries [or areas]
- F. None of the above
- G. Other – *Please specify.*
- H. Prefer not to say

C16. In your view, what policy areas need to be strengthened to improve the recruitment and employment of migrant workers in your industry? *Please select up to three options if not selecting J or K.*

- A. Migrant workers' access to social security schemes and public services
- B. Salaries and wages provided to migrant workers
- C. Grievance redressal for migrant workers
- D. Occupational health and safety of migrant workers
- E. Living conditions of migrant workers
- F. Recruitment process of migrant workers
- G. Visas and work permits for migrant workers
- H. Migrant workers' transit to destination countries [or areas]
- I. Working conditions of migrant workers
- J. Other – *Please specify.*
- K. None of the above areas need to be strengthened.
- L. Not sure

C17. Do you anticipate contractions/expansions in the volume of incoming migrant workers in your industry in the coming years?

- A. Contraction – mostly due to improving economic situations in migrant workers' home countries [or areas]
- B. Contraction – mostly due to a decline in demand for migrant workers in my industry
- C. Contraction – mostly due to rising costs in other parts of the business in my industry
- D. Contraction – mostly due to tightening government policies favouring local workers
- E. Contraction – mostly due to stricter policies and higher requirements for the recruitment and employment of migrant workers imposed on companies operating in my industry
- F. Expansion – mostly due to an increase in demand for migrant worker jobs in my industry
- G. Expansion – mostly due to the reluctance of local workers to fill jobs typically occupied by migrant workers
- H. Not sure/Cannot say

APPENDIX C: QUESTIONNAIRE – MIGRANT WORKERS’ SURVEY

Screening and profiling questions

D1. Do you work in a location outside the country or area where you were born? *Please select one.*

- A. Yes
- B. No – *Exit.*

D2A. What is your nationality?

[Only Asian countries or areas qualify.]

D2B. Which country or area do you live and work in currently? *Please select one.*

[List was aligned with the destination countries or areas included in the business executives’ survey.]

D3. What is the highest level of education you have completed? *Please select one.*

- A. Less than high school/secondary school or equivalent
- B. High school/secondary school or equivalent
- C. Some college/university or technical school; no degree
- D. College/university or technical degree
- E. Master’s degree – *Exit.*
- F. Doctoral degree – *Exit.*
- G. Professional degree (e.g. Juris Doctor (J.D.), doctor of medicine (M.D.)) – *Exit.*
- H. Prefer not to disclose – *Exit.*

D4. What is your age? *Please input.*

D5. Which best represents your gender? *Please select one.*

- A. Male
- B. Female
- C. Another designation
- D. Prefer not to disclose

D6. Which, if any, of the following apply to you? *Please select all that apply.*

- A. Married (without children) [exclusive to B, C, D and E]
- B. Single (never married) [exclusive to A, C, D and E]
- C. Divorced/separated [exclusive to A]
- D. Parent of child(ren) age 5 or under
- E. Parent of child(ren) over age 5
- F. Caregiver to parents or other adults
- G. Other – *Please specify.*
- H. Prefer not to disclose

D7. What sector do you work in? Please select one.

- A. Agriculture and food
- B. Construction
- C. Hospitality
- D. Manufacturing
- E. Retail
- F. Care (e.g. health care, eldercare, nursing homes)
- G. Other – Please specify.

Content questions

C1. If given the choice, which are the top three countries or areas in Asia you would like to work in? You may also select your current location.

- A. Japan
- B. South Korea
- C. China
- D. Hong Kong SAR, China
- E. India
- F. Singapore
- G. Malaysia
- H. Thailand
- I. Philippines
- J. Other – Please specify.

C2. Why did you decide to migrate? Please select up to two of the main reasons.

- A. Better income opportunities in the destination country or area
- B. Better quality of life in the destination country or area (e.g. availability of education, health care and infrastructure)
- C. Lack of jobs in my origin country or area
- D. Repeated discrimination on account of my gender in my origin country or area
- E. Repeated weather events in my origin country or area (e.g. flooding, drought, land erosion)
- F. Social, political and/or religious unrest in my origin country or area
- G. Termination from my job because of downsizing
- H. Termination from my job because the business replaced labour with new technology
- I. Other – Please specify.
- J. Prefer not to say

C3. Which of the following situations currently applies to you?

- A. My earnings in my destination country or area are enough to cover my living costs, send money home and have savings.
- B. My earnings in my destination country or area are enough to cover my living costs, but not to save or send money home.
- C. My earnings in my destination country or area are not enough to cover my living costs, save or send money home.
- D. I prefer not to say.

C4A. In the coming years, if your origin country or area would be able to offer you the same income as you earn in the destination country or area, would you go back?

- A. Yes, I would go back.
- B. No, I would not go back.
- C. Not sure/Cannot say.

C4B. If you selected “No, I would not go back” in the previous question, please answer: In the coming years, if your origin country or area would be able to offer a higher income than your destination country or area, would you go back?

- A. Yes, I would go back.
- B. No, I would not go back.
- C. Not sure/Cannot say.

C5A. Did you have to take out a loan to cover the costs of your migration?

- A. Yes
- B. No

C5B. If you selected A in the previous question, please answer: In how many months do you think you can pay off the loan?

- A. Less than three months
- B. Three to six months
- C. Within 12 months
- D. Within 24 months
- E. More than 24 months
- F. I have already paid off my loan.

C6A. Do you think men are paid more than women for the same job as yours in your origin country or area?

- A. Yes, men are paid more than women.
- B. No, men and women are paid equally.
- C. No, women are paid more than men.
- D. Not sure/Cannot say.

C6B. Do you think men are paid more than women for the same job as yours in your destination country or area?

- A. Yes, men are paid more than women.
- B. No, men and women are paid equally.
- C. No, women are paid more than men.
- D. Not sure/Cannot say.

C7. To the best of your knowledge, do your co-workers who are nationals of your destination country or area and who do the same work as you earn the same salary as you?

- A. Yes, they earn the same.
- B. No, they earn more.
- C. No, they earn less.
- D. Not sure/Cannot say.

C8. Do you think more workers who are nationals of your destination country or area will take up the type of job you do in the coming years?

- A. Yes, they are increasingly taking up the type of job I do.
- B. No, they are not interested in taking up the type of job I do.
- C. Not sure/Cannot say.

C9. Do you think the skills and experiences you have gained in your current job will help you secure a better-paying job in your origin country or area if you choose to move back?

- A. Yes
- B. No
- C. Not sure/Cannot say

C10A. Do you see new and advanced technologies being adopted in your workplace?

- A. Yes, on a large scale.
- B. Yes, but only to a small extent.
- C. No.
- D. Not sure/Cannot say.

C10B. If you selected “Yes, on a large scale” in the previous question, please answer: Was there an acceleration in technology adoption as a result of COVID-19?

- A. Yes, adoption increased after the COVID-19 pandemic.
- B. No, adoption was high even before the COVID-19 pandemic.
- C. Not sure/Cannot say.

C11A. If you selected either option A or B in C10A, please answer: Are you currently being trained to operate a new technology in your workplace?

- A. No
- B. Yes

C11B. If you selected “No” in the previous question, please answer: Have you been told by your employer that you may receive training to operate new and advanced technologies?

- A. No
- B. Yes

C12. Have you witnessed other workers been brought in to operate new technology in your industry?

- A. Yes, local workers in my destination country [or area]
- B. Yes, new migrant workers from other countries [or area]
- C. Yes, new migrant workers from my country or areas with higher skills
- D. No
- E. Not aware

C13. Do you fear being replaced at work by new technology in the future?

- A. Yes
- B. No
- C. Not sure/Cannot say

C14A. Have you witnessed an increase in the number of new infrastructure projects in your destination country or area?

- A. Yes
- B. No
- C. Not aware

C14B. If you selected “Yes” in the previous question, please answer: If these new projects create job opportunities that are relevant to you, would you consider working in them?

- A. Yes
- B. No
- C. Not sure/Cannot say

C15A. Have you heard of an increase in the number of new infrastructure projects in your origin country [or area]?

- A. Yes
- B. No
- C. Not aware

C15B. If you selected “Yes” in the previous question, please answer: If these new projects create job opportunities that are relevant to you, would you consider returning to your origin country [or area]?

- A. Yes
- B. No
- C. Not sure/Cannot say

C16A. Are you seeing more job opportunities that involve taking care of the elderly?

- A. Yes
- B. No
- C. Not aware

C16B. Would you be willing to work in a job that involves taking care of the elderly in their homes?

- A. Yes
- B. No
- C. I am currently doing this type of job
- D. Not sure/Cannot say

C17A. Are you seeing more job opportunities in health facilities (e.g. hospitals, clinics, nursing homes, medical labs)?

- A. Yes
- B. No
- C. Not aware

C17B. Would you be willing to do a job in a health facility, assuming you gain the relevant skills for it? (e.g. hospitals, clinics, nursing homes, medical labs)

- A. Yes
- B. No
- C. I am doing this type of job currently.
- D. Not sure/Cannot say

C18. How frequently has your home town/village/city experienced adverse weather changes in the past three years? (e.g. floods, drought, land erosion)

- A. Very frequently
- B. Not so frequently
- C. Not at all
- D. Not aware

C19A. In your community/network back home, are people experiencing losses (e.g. crops, houses, businesses) from events like floods, droughts and land erosion?

- A. Yes, they are experiencing losses more frequently.
- B. Yes, but these losses happen rarely.
- C. No, they are not experiencing any losses.
- D. Not aware.

C19B. If you selected option A in the previous question, please answer: Are these people planning to migrate because of such losses?

- A. Yes, they are planning to migrate to another country or area.
- B. Yes, but they are planning to migrate within the country or area.
- C. No, they are not planning to migrate.
- D. Not aware.

C20. Have you changed your occupation because of the impact of weather events like floods, droughts and land erosion?

- A. (If applicable) I worked in agriculture (or related occupations) in my origin country or area, but now work in another sector after migrating.
- B. (If applicable) No, I continue to work in agriculture (or related occupations) in my destination country or area.
- C. No, I work in the same industry in my destination country or area as I did in my origin country or area.
- D. This does not apply to me.

C21A. What type of assistance, if any, did the government of your destination country or area offer you? *Please select all that apply.*

- A. Help with finding a job
- B. Financial assistance to help me settle in my destination country or area
- C. Housing support
- D. Subsidized or free transportation
- E. Access to social security scheme/support
- F. Access to health care
- G. Access to education and health care for my children
- H. Legal/regulatory support
- I. Language training
- J. Skills training
- K. Culture training
- L. Pandemic support (health care/travelling back to origin country or area/quarantine support)
- M. Other – *Please specify.*
- N. I was not offered any assistance by the government of my destination country or area.

C21B. What type, if any, of assistance did your company/employer in your destination country or area offer you? *Please select all that apply.*

- A. Financial assistance to help me settle into the destination country or area
- B. Housing support
- C. Subsidized or free transportation
- D. Access to social security scheme/support
- E. Access to health care
- F. Access to my children's education and health care
- G. Legal/regulatory support
- H. Language training
- I. Skills training
- J. Culture training
- K. Pandemic support (health care/travelling back to origin country or area/quarantine support)
- L. Other – *Please specify.*
- M. I was not offered any assistance by my company/employer in my destination country or area.

C22. What are your future plans?

- A. I plan to continue living in the country or area I migrated to.
- B. I plan to return to my origin country or area if I find better economic opportunities there.
- C. I wish to migrate to another country or area.
- D. Other plans – *Please specify.*
- E. Not sure.
- F. I prefer not to say.

C23. How has the COVID-19 pandemic affected your migration preferences within the region in the future?

- A. I would prefer to migrate within Asia.
- B. I would prefer to migrate outside Asia.
- C. I am open to migrating to either within or outside Asia.
- D. The pandemic did not make a difference on my preferences.
- E. Not sure/Cannot say.



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