API 2020 Briefing Paper No. 04

Intra-ASEAN migration: Risks and opportunities

Executive Summary

- Intra-ASEAN Migration has been increasing with economic determinants such as wage differentials being the main factors.

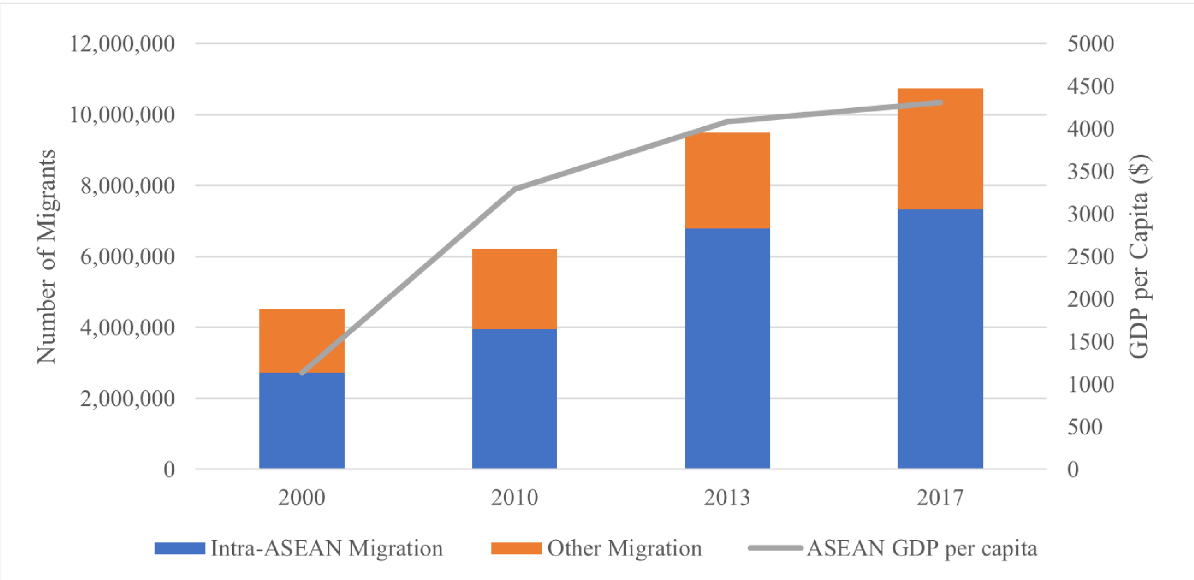
- This migration creates economic opportunities and supports regional integration, but also presents challenges given the divergent levels of economic development of Member States.

- At the regional level, ASEAN policy has focussed on facilitating high-waged labour mobility rather than improving governance of low-waged labour, which represents the vast majority of labour flows.

- The pandemic has put a strain on migration flows, highlighting these challenges. Moving forward ASEAN Member States should pursue a human capital approach to regional integration, through ensuring basic labour protections and strengthening regional governance of migration.

Intra ASEAN Migration

Figure 1 Composition of ASEAN Migration vs GDP per capita



Source: Raymer, J, Guan, Q and Ha, J.T. 2019. 'Overcoming Data Limitations to Obtain Migration Flows for ASEAN countries', Asian Pacific Migration 28(4), 385-414.; ASEANStats. 2020. Gross domestic product (GDP) per capita in ASEAN, at current prices (nominal), in US dollars (annually).

Intra-ASEAN migration has been growing exponentially since the 1990s. Although total migration has been similarly growing in ASEAN, which includes migration from outside of ASEAN, the proportion of those travelling within the region has been steadily increasing along with economic growth (Figure 1).

Geographical proximity added with economic considerations are the two most important factors in the decision to migrate. Geographical proximity significantly lowers the cost of migration and allows a certain security to migrants, as moving from their country of origin to their destination and vice versa is made easier. For example, the highest amounts of migration from Cambodia, Laos, Myanmar and Vietnam (CLMV) are to Thailand because of their proximity and because Thailand is economically more advanced than the CLMV countries.

The Indonesia to Malaysia corridor has witnessed one of the largest and most consistent flows of migrants. In the late 2000s for example, around 20-30% of Malaysia's workforce consisted of Indonesian migrants in construction, manufacturing, services and domestic work.[1] Similarly, although Malaysia is generally considered a More Economically Developed Country (MEDC) in ASEAN, a large outflow of migrants still go to Singapore because of its relatively higher income than Malaysia. Table 1 gives a glimpse of the size of migration through employed migrants.

Table 1 Employed Migrants by Country of Origin in 2017

Migrant Origin / Destination	Malaysia	Indonesia	Thailand	Vietnam	Cambodia	Myanmar	Philippine	Laos
Malaysia	-	720,464	16,177	53,473*	35,286*	114,507	55,184	51*
Indonesia	24,417	-	166	148	0	283	1,433	0
Thailand	3,002	1,339	-	1,004	355,933	1,347,718	15,195	154,711
Cambodia (2008)	295	102	16,593	33,459	-	90	423	407
Brunei (2014)	8,404	19,398	834	71	0	80	12,386	0
Laos	-	-	4,889	2,259	-	-	-	-

Note (1): Other years than 2017 are used if data is unavailable
*(2): *denotes data from 2011*
Source: ILO. 2018. 'International Labour Migration Statistics Database in ASEAN'.

The most obvious motivation for migrating has been differences in income levels between member states. Wage differentials and remittances are the primary factor driving large cross-border and intra-ASEAN labour migration. This is driven by uneven levels of economic development across the region. The average monthly wage in Thailand for example, is three times both Cambodia and the Lao PDR with a similar picture being drawn between Malaysia and Indonesia. Singapore is the exception in the region as its GDP per capita as well as average wages far exceed the regional average and thus attracts all types of migrants even extra-regionally.[2]

[1] ILO. 2016. *'Review of Labour Migration Policy in Malaysia'.*
[2] ADB. 2018, *'Skilled Labor Mobility and Migration'.*

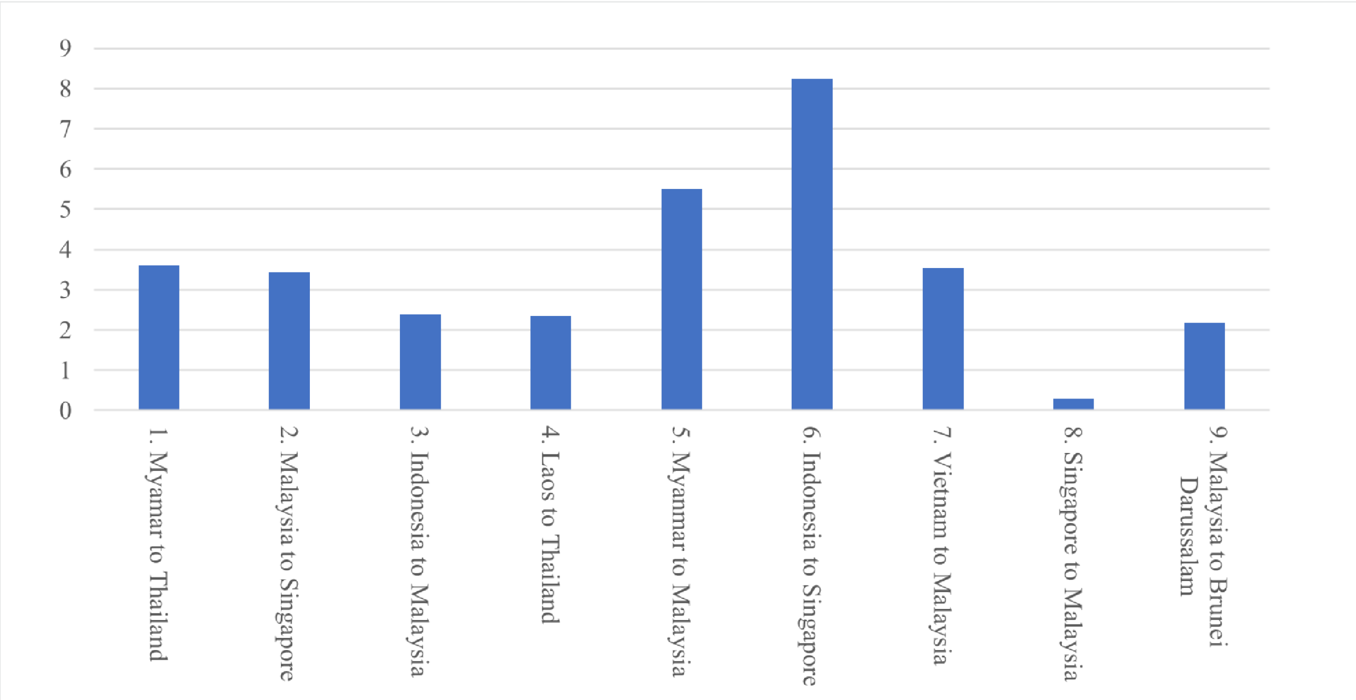
Intra-regional migrant remittances in ASEAN was estimated to be USD7.8 billion in 2016. The share of intra-regional remittances are high in Cambodia, Lao PDR, Myanmar, and Malaysia, ranging from 56.7% to 68% of GDP but as a whole, Less Economically Developed Countries (LEDC) tend to rely more on remittances with the exception of Indonesia as seen in Table 2.[3] Besides that, Figure 2 shows that nine out of the top ten intra-ASEAN migration corridors have all been to a country with at least double the GDP per capita of the migrant's origin country.

Table 2 Remittances as a share of GDP in 2019

Country	Remittances as a share of GDP in 2019 (%)
Laos	29.20
Philippines	9.90
Viet Nam	6.50
Cambodia	5.90
Thailand	1.30
Indonesia	1.00
Malaysia	0.50

Source: The World Bank. 2020. 'Annual Remittances Data'.

Figure 2 Ratio of destination- to origin-country GDP per capita in ASEAN's 10 largest migration corridors, 2020



Source: World Economic Outlook Database, IMF, 2020; Modified from World Bank. 2017. 'Migrating to Opportunity: Overcoming Barriers to Labour Mobility in Southeast Asia'.

3. Ibid.

An added factor in the economic considerations is the development level of the ASEAN member states. MEDCs in ASEAN tend to have a larger net migration inflow from LEDCs as evident from Table 1. The reverse is also true where LEDCs tend to have larger net migration outflows. Thus, it is clear that, in general terms, the level of economic development is strongly related to the nature of migration (Table 3).

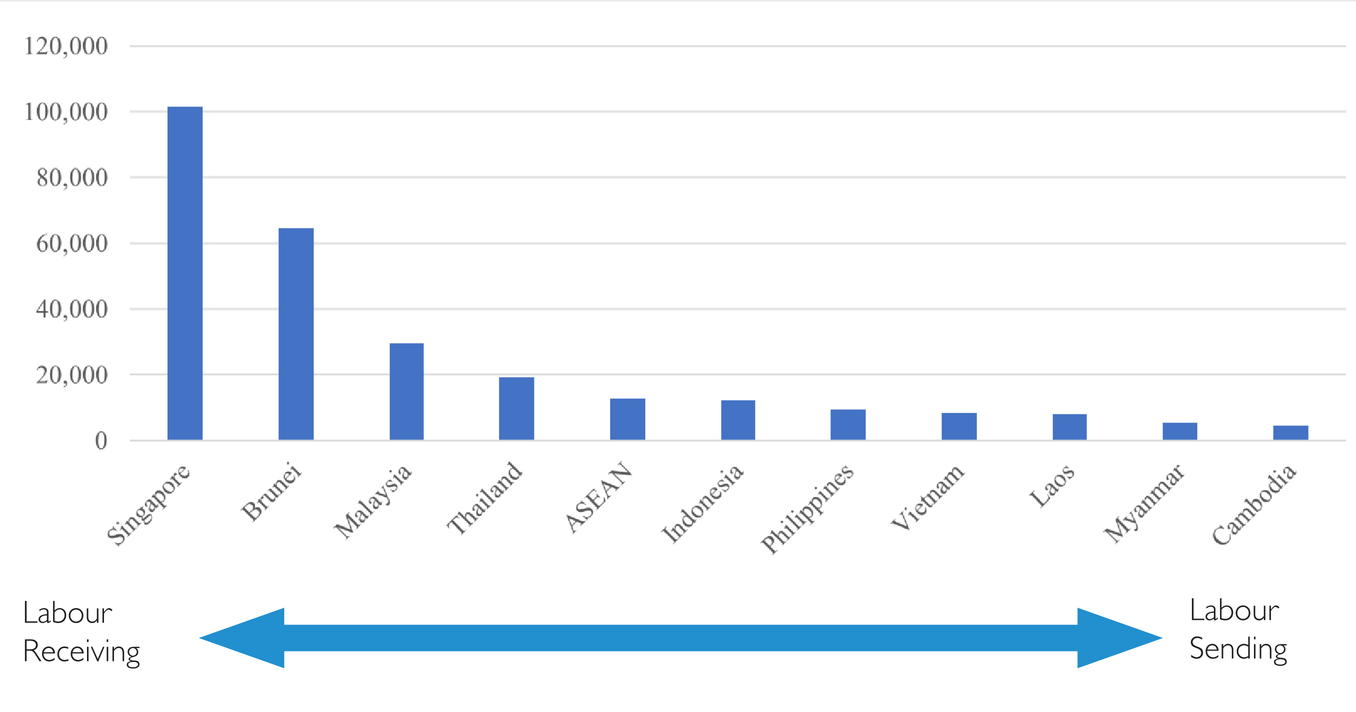
Table 3 Categorisation of ASEAN member states

Category	Labour-sending (LEDC)	Labour Receiving (MEDC)
Countries	Cambodia, Indonesia, Laos, Myanmar, the Philippines, Viet Nam	Brunei Darussalam, Singapore, Malaysia, Thailand
Economic Characteris-tics	•High population growth rates •Low proportion of aged population (60 years) •Low rates of urbanization •Low per capita GDP •Fertility rates higher than other countries in the region	•Very low or negative population growth •High proportion of aged population (60 years) •High rates of urbanization •High per capita GDP •Fertility rates below replacement rates
Migration Characteris-tics	Managing Outflows •Protection of nationals abroad •Remittances	Managing Inflows •High levels of irregular inflows •Enforcement of migration laws

Source: Modified from Allison-Reumann. L. 2017. 'Integrating ASEAN in Labor Migration Policy: From Disjointed to Complementary'. Asian Politics & Policy 9(3). 427-441

The threshold between a labour receiving country and a labour sending country can conveniently be measured by its GDP per capita as seen in Figure 3. A higher than the ASEAN average GDP per capita will place a country in the labour receiving category while a lower than ASEAN average GDP per capita often means that it is a labour-sending country.

Figure 3 ASEAN GDP (PPP) per Capita ($) and Labour Categorisation Spectrum



Source: IMF. 2020. 'World Economic Outlook Database'.

This data however still does not capture the full picture of intra-regional migration especially considering irregular migration make up an estimated 40% of total intra-ASEAN migration.[4] This is especially the case with countries that share a border such as Malaysia and Indonesia or Thailand and Myanmar, as local companies benefit from cheap, unregulated labour.[5] The increasing relevance of regional migration has led to many bilateral agreements in the form of Memorandums of Understanding (MoU) that are non-legally binding documents that acknowledge and govern migration. MoUs have been common practice in ASEAN as seen in Table 4.

4. *International Labour Organisation. 2018. 'Social protection for migrant workers in ASEAN: Developments, challenges, and prospects'*

5. *Raymer, J, Guan, Q and Ha, J.T. 2019. 'Overcoming Data Limitations to Obtain Migration Flows for ASEAN countries', Asian Pacific Migration 28(4), 385-414.*

Table 4 Memorandums of Understanding Between ASEAN Member States

Country of Origin	Destination Country
Cambodia	Thailand (2003, 2015); Vietnam (on trafficking [2005]); Malaysia (2015) Thailand, and Vietnam
Greater Mekong Subregion	MoU on cooperation against trafficking (2004), with Cambodia, China, Laos, Myanmar
Indonesia	Malaysia (2006, amended 2011)
Laos	Thailand (2002); Vietnam (on trafficking [2010])
Myanmar	Thailand (2003, 2009 on trafficking)
Philippines	Indonesia (2003); Laos (2005)

Source: Modified from Allison-Reumann. L. 2017. 'Integrating ASEAN in Labor Migration Policy: From Disjointed to Complementary'. Asian Politics & Policy 9(3). 427-441

There also a number of ASEAN-level instruments designed to facilitate the movement of people between ASEAN Member States (AMS). These include Mutual Recognition Agreements (MRAs) for professional qualifications, to allow certified professionals to practice across ASEAN.

Challenges with ASEAN migration

The growth in intra-ASEAN migration is, on one level, a driver of integration. However, it also raises a number of challenges which may undermine efforts to achieve sustainable development across all AMS through regional integration.

Firstly, despite growth in intra-ASEAN migration many of ASEAN's higher-waged migrants choose to leave the region. Despite the exponential growth in ASEAN migration, about 60-70% of migration tend to be extra regional. 5.5 million migrants, which is about 40% live in other ASEAN countries while another 5 million are living in North America and about 13% of total migrants are in Europe. Between the years 2000 to 2010, the outflow of high-waged migrants in OECD countries increased by 66% with Thailand more than doubling the amount of outflows suggesting a continuing brain drain from ASEAN.[6]

To promote the migration of high-waged workers within ASEAN, a number of policy instruments have been introduced. However, despite the policy focus on developing high-waged migration, the impact of ASEAN-wide policies to date has been limited. Agreements such as the Movement of Natural Persons (MNP), ASEAN Comprehensive Investment Agreement (ACIA) and Mutual Recognition Agreements (MRA) are targeted at intra-regional professional migrants but are oftentimes too restrictive or secondary to individual policies in the AMS.[7]

Whilst policy to promote high-waged migration is progressing slowly, low-waged migration is subject to relatively low policy attention at the regional level. Low-waged labour makes up an estimated 87% of total intra-regional migration but ASEAN policy so far primarily focuses on facilitating high-waged labour through various regional agreements rather than enhancing the governance of low-waged labour.[8]

The absence of regional governance and the nature of low-waged migration generates risks of exploitation and abuse of migrant workers. Recruitment agencies are controversial in the labour sending countries for shifting the cost of migration to the migrants themselves who often take loans to pay the fees. In Indonesia, the National Board on the Placement and Protection of Indonesian Overseas Workers (BNP2TKI) has been widely criticised for being unable to regulate the officially recognised recruitment agencies. [9]

Abuse within the migration "industry" is often met with backlash from individual national governments as well as the wider public. Figure 4 shows the effect of this as despite signing an MoU in 2006, Indonesian migration to Malaysia had decreased following mass movements against the abuse cases of Indonesian domestic workers culminating in a ban in 2009. In 2011, the ban was lifted, and the MoU between Malaysia and Indonesia was amended to mitigate the widespread problem of migrant abuse but besides a temporary increase in 2013, Indonesian migration to Malaysia continued its decline.

6. *ADB. 2018, 'Skilled Labor Mobility and Migration'.*

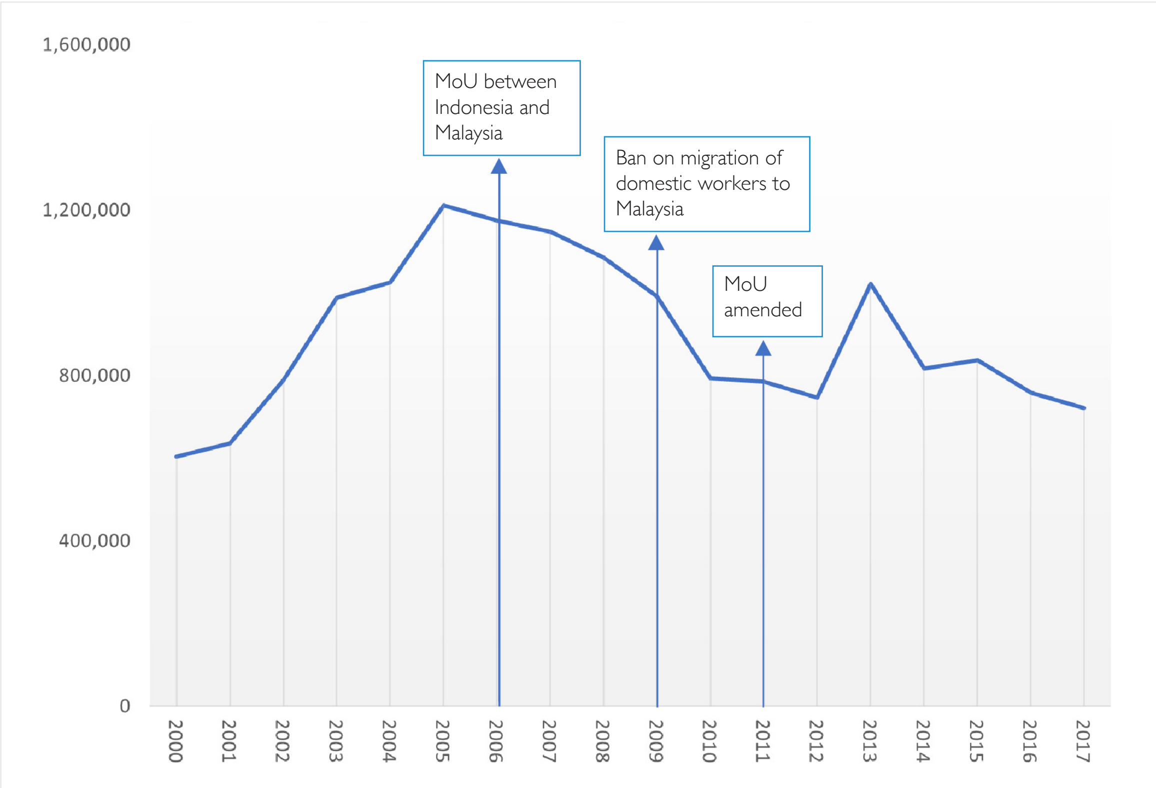
7. *Sugiyarto, G and Agunias, D.R. 2014. 'A "Freer" Flow of Skilled Labour within ASEAN: Aspirations, Opportunities and Challenges in 2015 and Beyond', Issue in Brief 11.*

8. *Ibid*

9. *Elias, J. 2018. 'Governing Domestic Worker Migration in Southeast Asia: Public-Private Partnerships, Regulatory Grey Zones and the Household'. Journal of Contemporary Asia 48(2). 278-300.*

Malaysia faced a similar situation when Malaysian employers attempted to use Cambodian domestic workers as substitutes during the Indonesian ban which led to a Cambodian ban of migration to Malaysia not only because of the abuse cases in the migrant industry in Malaysia but also the recruitment agencies in Cambodia themselves. Recruitment agencies themselves in the Philippines had banned immigration to Singapore because of the common practice of working off the payment levy debt, a practice banned by the Philippines government.[10]

Figure 4 Employed Indonesian Migrants In Malaysia



Source: International Labour Migration Statistics Database in ASEAN, International Labour Organisation, 2018

Beyond the risks to individual migrants of abuse and exploitation, the current dynamics of intra-ASEAN migration may in fact have some negative implications for economic development.

MEDCs have benefited significantly from access to low-cost labour from LEDCs. The ASEAN economy is comprised overwhelmingly of SMEs with up to 98% of businesses in ASEAN being SMEs. SMEs are reliant, not only on the cheap forms of labour from migration but the temporary nature of migration. Therefore, it is not surprising that most of the intra-ASEAN migrants tend to work in SMEs in the informal economy such as construction, agriculture and fisheries. Additionally, many are employed in households and services, such as Foreign Domestic

10. *Ibid*

Workers (FDW) which are often completely excluded from labour and social protection. FDWs have been essential in allowing woman in developed economies to leave the domestic sphere and contribute to the economy through high-wagedlabour which effectively creates double income families in many MEDCs.

Policy choices have served to keep the cost of low-waged foreign labour down, including through exclusion from social and labour protection, such as the minimum wage. In many cases enforcement activities have focussed on migrants themselves, rather than employers. In Thailand, policies have often been characterised as 'pro-employers' as SMEs are rarely sanctioned for recruiting irregular immigrants or exploiting labour.[11]

However, there is a risk that this high use of low-cost foreign labour undermines economic development in MEDCs. For example, Malaysia's productivity growth has slowed in recent years, as manufacturing activities have continued to rely on low cost foreign labour rather than capital upgrading, leading to increasing efforts by successive governments in Malaysia to reduce reliance on foreign labour.[12]

The challenge for MEDCs will become more acute as investors increase their focus on sustainability – including for labour. More than half of private equity in ASEAN have engaged in sustainable investment deals to generate social benefits through the Environmental, Social and corporate governance (ESG) guidelines. In the first half of 2019, 56% of all private equity deals in Southeast Asia met Bain & Company's sustainability criteria showing an increase interest in sustainable investments. In addition, 41% of private equity assets in 2018 were in sustainability assets compared to 1% in 2010. The consequences of the excesses of the migration industry have recently been subject to scrutiny from a sustainability perspective. Forced and child labour as well as other labour concerns in the palm oil industry, has led to sanctions to firms engaging in these practices.[13] Thus the shift to a more sustainable future threatens the model of low-cost labour driven production, if it does not adopt sustainable growth policies.

From the LEDC perspective, intra-ASEAN migration of low-waged labour also presents a double edged sword. On the one hand, the availability of economic opportunities overseas provides an important route out of poverty when there are limited domestic opportunities. Remittances also provide a vital source of income for those left behind. However, besides the risk of abuse for the migrants themselves the reliance of intra-ASEAN migration may have some negative impacts on economic development for the LEDCs. Excessive emigration has been found to increase unemployment rates of the origin country causing further mismatches to supply and demand.[14] Furthermore, remittances though an important driver of economic growth, is unreliable as a long-term development plan.[15]

This highlights a further divergence in the perception towards emigration in LEDCs. LEDC national policy portrays exportation of labour as a net positive to their countries. The policy in the Philippines of labour exportation, was seen as a matter of 'national interest' as a solution to rampant unemployment and balance of payment deficit.[16] However, as

11. Charanpal S. Bal and Kelly Gerard, 'ASEAN's Governance of Migrant Worker Rights', Third World Quarterly 39(4), 2017, 799-819.

12. ILO. 2016. 'Review of Labour Migration Policy in Malaysia'.

13. The Star. 2020. 'US bans imports from Malaysian palm oil company FGV'. Available at: https://www.thestar.com.my/business/business-news/2020/10/01/us-bans-imports-from-malaysian-palm-oil-company-fgv

14. Skuflic, L and Vuckovic, V. 2018. 'The Effect of Emigration on Unemployment Rates: The Case of EU Emigrant Countries. Economic Research-Ekonomska Istraživanja 31(1).

15. Amuedo-Dorantes, C. 2014. 'The Good and Bad in Remittance Flows'. IZA: World of Labor.

16. Cheah, Pheng. 2007. Biopower and the New International Division of Reproductive Labour, Boundary 2 34(1), 79-113.

remittances rose, the contribution it had to the Philippine economy became indispensable despite initially being a temporary measure. This is in contrast to the benefits of migration to the migrants themselves. Widespread abuse is now institutional in the migration industry of ASEAN and the backlash from the migrants and the citizens from LEDCs has been substantial. The aforementioned national responses from LEDC states have often been a result of public backlash which have put substantial pressure on governments to protect the rights of migrants.[17] In addition to Indonesia, Philippines and Cambodia, significant efforts have been pushed by Vietnam to expose the poor conditions migrants face. Vietnam's state media has adopted a more pro-labour stance by highlighting the shady practices of local recruitment agencies and the migration industry as a whole.[18]

The impact of Covid-19

The Covid-19 pandemic has placed a significant strain on intra-ASEAN migration, and exposed many of the challenges. Globally the Covid-19 pandemic has resulted in more restrictive borders which have put a virtual halt on migration flows. This is especially true for the ASEAN member states who have generally taken drastic measures to prevent the spread of the pandemic with nearly all states closing borders entirely.

The flattening of the pandemic curve in most ASEAN countries has led to a gradual reversal of those policies. However, complications, arise from the heterogeneity of the development of the pandemic. Two of the largest labour sending countries, Indonesia and Philippineshas had the most trouble in containing the pandemic which has led to a slower easing of travel and in some cases outright bans as is the case of Cambodia. Thailand as well has increased border security in light of an outbreak in the Rakhine state which have led to tighter border controls to Myanmar.

The pandemic has exposed the important role that many low-waged workers play within the more developed states. In Singapore, migrant work has still been seen as essential to the economy and efforts have been taken to put migrants in labour-intensive industries back to work. Thailand announced in July that it would allow migrant workers from CLMV to come back and work. More than 3,000 foreign teachers have been cleared for entry in Thailand, highlighting its increasing reliance on foreign workers. However, it has also exposed the health and social risks facing many migrants: low quality living conditions and inadequate access to health services have increased the risk of infection among the migrant population and exclusion from social protection has intensified economic hardship for those falling out of work.

The pandemic has also highlighted the vulnerability of the high dependence on foreign labour, as border restrictions reduce the available labour supply and social distance requirements limit the scope of labour-intensive production processes. As a result, the pandemic intensified efforts among some ASEAN governments – such as in Malaysia – to encourage firms to invest in digitalisation and reduce dependence.

17. *Elias, J. 2018. 'Governing Domestic Worker Migration in Southeast Asia: Public-Private Partnerships, Regulatory Grey Zones and the Household'. Journal of Contemporary Asia 48(2). 278-300.*

18. *Lian, K.F, Rahman, M.M and Alas, Yabit. 2016. International Migration in Southeast Asia: Continuities and Discontinuities.*

Recommendation: Towards a human capital approach

1. Intra-ASEAN migration can be a driver of economic development and regional integration. But weaknesses in the current system – highlighted by the Covid-19 pandemic – demonstrate the need for reform. ASEAN Member States collectively and individually should work towards a human capital approach that promotes sustainable labour mobility.

2. At the national level, AMS should strengthen the institutional governance of low-waged labour migration. Ratification of international conventions meant to protect workers and migrants such as the ILO conventions is an important step in fostering human capital. AMS should also extend equal social and labour market protections to migrants, particularly during the acute crises such as the Covid-19 pandemic.

3. AMS should also take steps to reduce the abuses of the migration "industry" by strengthening the agency of individual migrants and improving legal accountability of recruitment agencies. This could include allowing for visa applications on arrival, to reduce the power of recruitment agencies. Documentation regarding immigration should be made personal to the migrants in contrast to the current practices of it being held by the recruitment agencies or employers which essentially restricts their choices.[19] Lastly, sanctions and punitive measures should be redirected from migrants to the recruitment agencies and employers to discourage exploitative and abusive practices. At the regional level, ASEAN should continue to promote the movement of high-waged labour, but also support co-ordination of policies for low-waged migration.

[19] *These recommendations are modified from UN Women. 2013. 'Managing Labour Migration in ASEAN: Concerns for Women Migrant Labour'.*

Box 1: International Labour Organisation Conventions

The International Labour Organisation conventions aim to protect labour rights and promote decent work. Ratification of some of the conventions may prove useful in providing a standard to the region that will be a catalyst to regional integration on the organisation of labour and migrants. This is especially relevant as state policies in ASEAN that clash on labour and migrants issues continue to prove to be a major impediment to ASEAN integration. Some of the conventions relevant to this paper are:

ILO Con. 29 Forced Labour Convention, 1930
ILO Con. 87 Freedom of Association and Protection of Right to Organise Convention
ILO Con. 97 Convention on migration for employment convention
ILO Con. 98 Right to Organise and Collective Bargaining Convention, 1949
ILO Con. 143 Convention on migrant workers (supplementary provisions) convention, 1975
ILO Con. 157 Convention on maintenance of social security rights convention, 1982
ILO Con. 181 Convention on private employment agencies convention, 1997
ILO Con. 189 Convention on domestic workers convention, 2011

	C029	C087	C097	C098	C100	C105	C111	C138	C143	C157	C181	C182	C189
Brunei								2011				2008	
Cambodia	1999	1999	1999	1969	1999	1999	1999	1999				2006	
Indonesia	1950	1998		1957	1958	1999	1999	1999				2000	
Laos	1964				2008		2008	2005				2005	
Malaysia	1957		Sabah, 1964	1961	1997	1958; den (1990)	-	1997				2000	
Myanmar	1955	1955						2021				2013	
Singapore	1965			1965	2002	1965; den (1979)		2005				2001	
Thailand	1969				1999	1969	2017	2004				2001	
The Philippines			2009						2006	1994			2012
Vietnam	2007			2019	1997	2020	1997	2003				2000	

Note (1): den denotes that it was later denounced
Source: ILO. 2020. 'Conventions and Recommendations'

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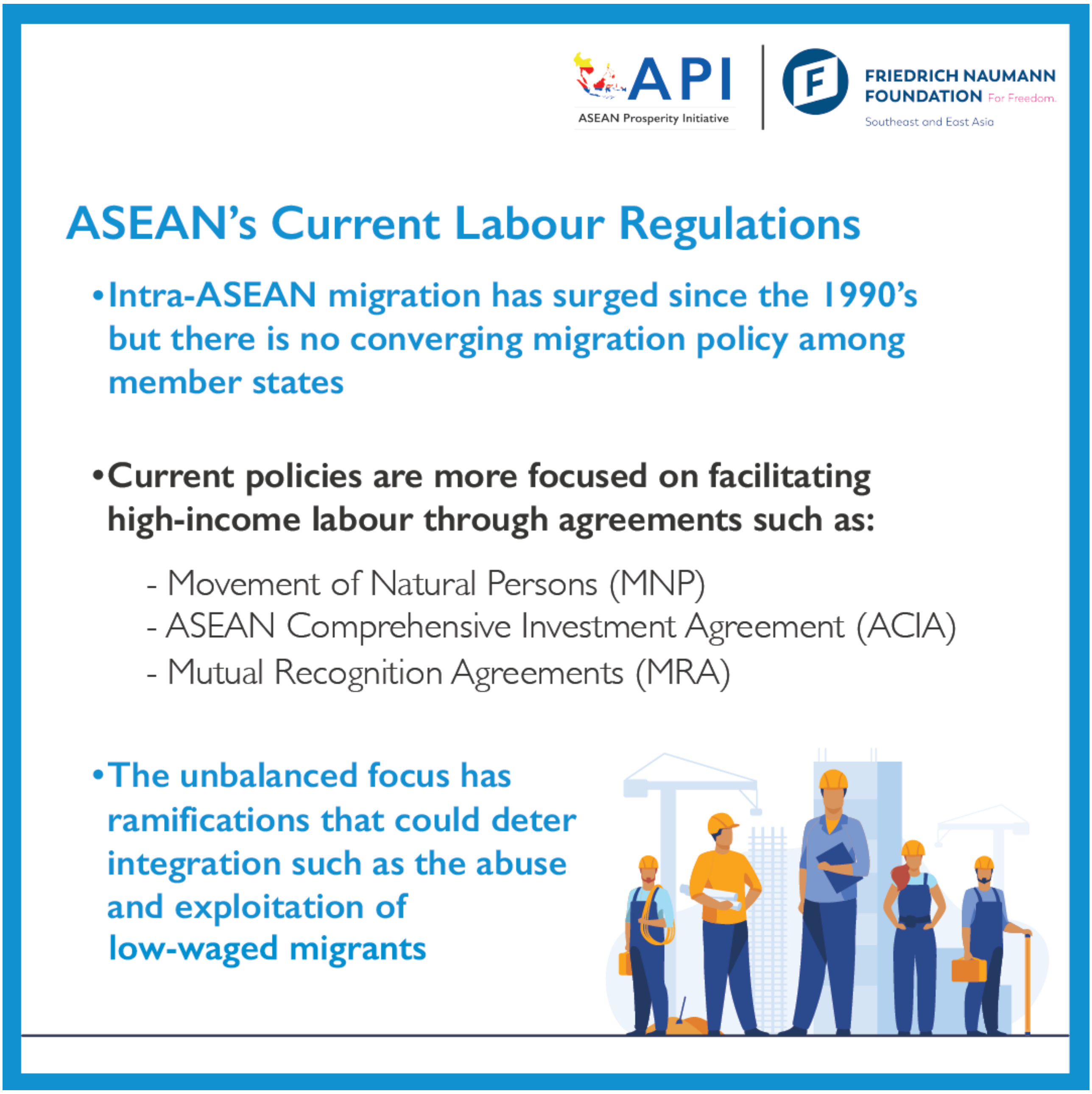
** The views expressed in this report are the authors own.*

Infographics



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Lessons Learnt from COVID-19

- The pandemic has highlighted the **precarious status and poor living conditions of low-waged migrants** around ASEAN
- The **lack of labour organisations and precarious legal conditions** of low-waged migrants made it difficult to understand the issues from their perspective
- As the curve flattens in some countries, ASEAN member states (AMS) have slowly **open up borders to mainly the ASEAN+3 group**
- This accentuates the interdependence between AMS and shows strong support for efforts to improve ASEAN labour regulations

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Key Recommendations

- AMS should also take steps to reduce the abuses of the migration "industry" by strengthening the agency of individual migrants and improving legal accountability of recruitment agencies.
- Encourage regional efforts to invest in institutions that foster industrial relations to cultivate human capital development in ASEAN
- More collaborations between ASEAN business associations to create a coherent labour plan for greater regional economic integration

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ACIA	ASEAN Comprehensive Investment Agreement
ASEAN	Association of Southeast Asia Nations
GDP	Gross Domestic Product
IDEAS	Institute for Democracy and Economic Affairs
ILO	International Labour Organisation
IMF	International Monetary Fund
LEDC	Less Economically Developed
MEDC	More Economically Developed
MNP	Movement of Natural Persons
MoU	Memorandum of Understanding
MRA	Mutual Recognition Agreement
SCMP	South China Morning Post

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