



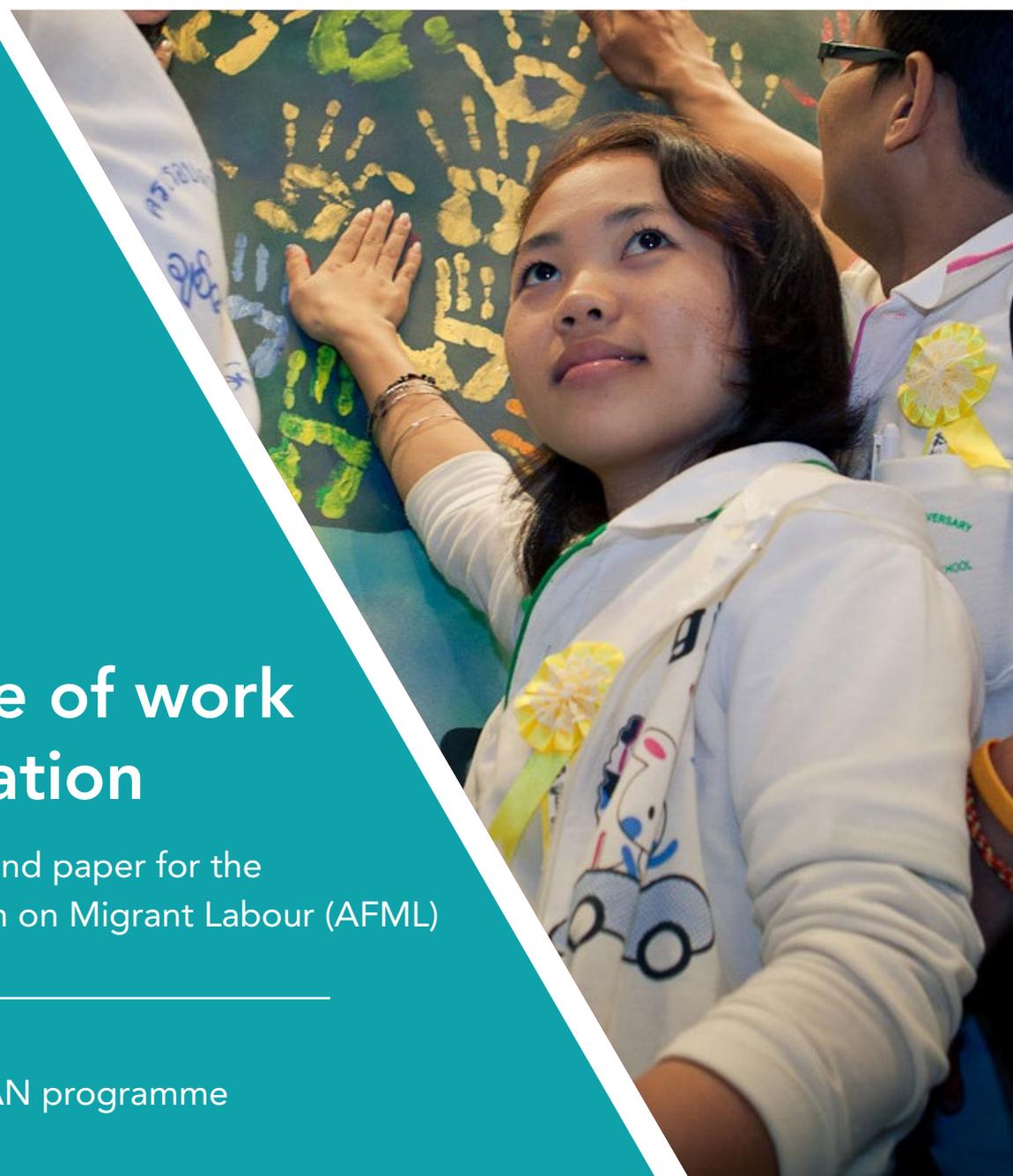
International
Labour
Organization



The future of work and migration

Thematic background paper for the
12th ASEAN Forum on Migrant Labour (AFML)

TRIANGLE in ASEAN programme
supported by





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Foreword

As the ILO celebrates its 100th anniversary and looks back at its legacy to date, we also pause to reflect on the future of work and what it might have in store for us. With a transforming world, we must be ready to deal with changes, challenges and opportunities.

Among the new challenges and opportunities that we face are technological changes, climate-induced changes, greening of economies, globalization and demographic changes. The transformations taking place around us are rapid and have great impacts on various aspects of the labour market, including on the composition of skills needed, production technologies, how work is organized, employment relationships, social security, governance of work and tripartism. These transformative changes present new opportunities to improve the quality of working conditions and create economic security. However, decisive actions are called for to seize these opportunities.

In the ASEAN region, specifically, the future of work will likely be characterized by increasing global integration and mobility. Against this backdrop, the ILO was delighted that the Government of Thailand, current chair of the ASEAN, chose “Future of Work and Migration” as the theme for the 12th ASEAN Forum on Migrant Labour (AFML), held in Bangkok on 25-26 September 2019.

The unique nature of the ASEAN Forum on Migrant Labour (AFML) as a regional platform for tripartite-plus policy dialogue on labour migration issues is recognized globally as a good practice. It is fitting that an important topic like the “Future of Work and Migration” is discussed on this holistic platform involving representatives of governments, employers’ organizations, workers’ organizations and civil society from all ten ASEAN Member States. We thank all delegates for sharing their experiences and exchanging ideas on how to take on the challenges and opportunities that the future of work could bring to migration and migrant workers.

This report was prepared by the ILO TRIANGLE in ASEAN programme as a thematic background paper to inform discussions at the 12th AFML. It builds on the work of the ILO’s Global Commission on the Future of Work, important regional events such as the Special Session of the ASEAN Labour Ministers on the Future of Work, held in Singapore on 29-30 April 2019, and the contributions of tripartite-plus participants at the preparatory meetings in the run up to the 12th AFML.

Once again, we congratulate Thailand for choosing this important and relevant theme for the 12th AFML and we look forward to continuing the dialogue with ASEAN in the future.



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This paper was developed through the contributions of participants to the national preparatory meetings organized in Cambodia, Indonesia, the Lao People’s Democratic Republic, Malaysia, Myanmar, the Philippines, Thailand, and Viet Nam in the lead up to the 12th AFML. Contextual and technical input from representatives of governments, employers’ and workers’ organizations, civil society, and international organizations during these meetings greatly benefitted the development of this paper. The authors are also grateful for comments provided by ASEAN Member States, through the ASEAN Committee on the Implementation of the Declaration on the Protection and Promotion of the Rights of Migrant Workers, both during and after the 12th AFML. Thanks are also due to Professor Philip L. Martin, University of California, Davis, and ILO colleagues Nilim Baruah, Senior Migration Specialist, and Sara Elder, Senior Economist, Head of Regional Economic and Social Analysis (RESA), ILO Regional Office in Asia and the Pacific, for their inputs.

The 12th AFML was co-organized by the Ministry of Labour, Thailand, together with the ASEAN Secretariat, ILO’s TRIANGLE in ASEAN programme, the International Organization for Migration, UN Women, and the Task Force on ASEAN Migrant Workers. TRIANGLE in ASEAN is a partnership between the Australian Department of Foreign Affairs and Trade (DFAT), the Global Affairs Canada (GAC), and the ILO.

Abbreviations and acronyms

AFML	ASEAN Forum on Migrant Labour
ASEAN	Association of Southeast Asian Nations
Cebu Declaration	ASEAN Declaration on the Protection and Promotion of the Rights of Migrant Workers, 2007
GCM	Global Compact for Safe, Orderly and Regular Migration
GDP	gross domestic product
ILO	International Labour Organization
IOM	International Organization for Migration
MOU	memorandum of understanding
MRA	mutual recognition agreement
MRS	mutual recognition system
OECD	Organisation for Economic Co-operation and Development
RPL	recognition of prior learning
SDGs	Sustainable Development Goals
STEM	science, technology, engineering and mathematics
TFR	total fertility rate
TVET	technical and vocational education and training





1. Introduction and background

This paper was prepared to inform and guide the discussions at the 12th ASEAN Forum on Migrant Labour (AFML) held from 25 to 26 September 2019 in Bangkok, Thailand. The AFML is a tripartite meeting that brings together governments, employers' organization, and workers' organizations, alongside civil society organizations, to discuss migration governance issues across the Association of Southeast Asian Nations (ASEAN) region, and aims to promote and protect migrant workers' rights. The AFML is supported by the International Labour Organization (ILO) through its TRIANGLE in ASEAN programme,¹ the International Organization for Migration (IOM), and UN Women. The 12th AFML theme was "Future of Work and Migration".

While the AFML is themed each year, it aims to build regional solutions and harmony on the protection of migrant workers, as committed under the ASEAN Declaration on the Protection and Promotion of the Rights of Migrant Workers, 2007 (the "Cebu Declaration"), and more recently, the ASEAN Consensus on the Protection and Promotion of the Rights of Migrant Workers, 2017. Together, these documents establish a collaborative and cooperative framework for the protection of migrant workers in the region and contribute to the ASEAN Community building process.

¹ The TRIANGLE in ASEAN programme is a partnership between the Australian Department of Foreign Affairs and Trade (DFAT), the Global Affairs Canada (GAC), and the ILO.

1.1 The 12th ASEAN Forum on Migrant Labour

The 12th AFML was held on 25–26 September 2019 in Bangkok, Thailand. It was hosted by the Royal Government of Thailand as the current chair of ASEAN and the ASEAN Committee on the Implementation of the ASEAN Declaration on the Protection and Promotion of the Rights of Migrant Workers.

Thailand, as host of the 12th AFML, realized that the future of work and migration are intertwined and equally important. Therefore, the 12th AFML was a platform for tripartite-plus stakeholders from ASEAN Member States to discuss, share experiences and ideas, and exchange information on responding to changes in future labour markets and protection of migrant workers. The 12th AFML aimed to:

1. Take stock of stakeholders' progress in implementing the recommendations of previous AFMLs;
2. Discuss the 12th AFML theme and sub-themes as well as prepare recommendations on the future of work and migration in ASEAN as duly endorsed by tripartite partners;
3. Develop a report, recommendations, or set of positions that ASEAN Member States can use to advance the promotion of migrant workers' rights in the future.

The theme of the 12th AFML was the "Future of Work and Migration". The two sub-themes were:

1. **Sub-theme 1 – Challenges on Sustainable, Fair and Equal Protection:** This sub-theme will look into the projected challenges/impacts of the transforming future of work on migrant worker well-being and working conditions and what should be the appropriate responses by ASEAN and individual ASEAN Member States, especially on the social security scheme, the employment relationship, tripartism and the role of employers' organizations, trade unions and civil society on representation of migrants' voice, social dialogue, and collective bargaining, with the inclusion of a gender dimension in each aspect.
2. **Sub-theme 2: Challenges on Migrant Worker Employability:** This sub-theme will cover projected challenges/impacts on migrant workers' employability in the transforming future of work and what should be the appropriate responses by ASEAN and individual ASEAN Member States, particularly on skills requirements, education and training, lifelong learning concepts, and the role of national government, employers' organizations, trade unions, and civil society, also while taking into account the gender dimension of each aspect.

Leading up to the 12th AFML, the ILO's TRIANGLE in ASEAN programme supported the conduct of national preparatory workshops in eight ASEAN Member States, with the aim of taking stock of the progress of stakeholders in implementing the previous AFML recommendations and to discuss the themes of the 12th AFML. The preparatory meetings aimed to prepare the delegates for the discussions at the main meeting, through (among others) the adoption of sets of national AFML recommendations. Importantly, the discussions at the national preparatory meetings greatly informed the preparation of this paper. The ILO also facilitated regional workers' and employers' preparatory meetings.

This background paper was prepared to encourage consideration of migration governance in the context of the future of work transition, and proposes recommendations on addressing some of the specific migration challenges within the future of work.

1.2 The future of work: Global and regional initiatives

In 2019, the ILO marks its centenary with the dual aim of celebrating the organization's achievements over the last 100 years while also looking ahead to take its mandate of social justice into the next century. The high-level **Global Commission of the Future of Work** was appointed in late 2017 to consult existing data and research and national dialogues on the future of work to draft a report for the International Labour Conference in 2019. The culmination of a 15-month examination by the 27-member commission, made up of leading figures from business and labour, think tanks, academia, government, and non-governmental organizations is the report *Work for a brighter future – Global Commission on the Future of Work*, launched in February 2019. The report puts forward a **“human-centred agenda for the future of work”** with ten recommendations (see box 1), and calls for urgent attention to their implementation. Social dialogue is considered to be best suited to guide institutions and societies to solutions that address challenges at work. Taking forth the human-centred agenda for the future of work is also a core element of the ILO Centenary Declaration, adopted by ILO Member States in June 2019.

Important work has also been done at the ASEAN regional level to prepare for the future of work. The Government of Singapore, in collaboration with social partners and in partnership with the ILO, hosted in April 2019 the “Regional Conference on the Future of Work in Asia: Embracing Technology; Inclusive Growth” to discuss the recommendations of the report of the Global Commission on the Future of Work. The meeting resulted in adoption of the **ASEAN Labour Ministers’ Statement on the Future of Work: Embracing Technology for Inclusive and Sustainable Growth**, which recognizes the need to increase investments in the institutions of work as important foundations of propelling a “brighter” future of work (ILO, 2019b).

Another important regional initiative led by the ILO is the recent publication of the report **Preparing for the future of work: National policy responses in ASEAN +6** in September 2019. This report maps national planning and policy documents in the ten ASEAN countries and their six main trading partners to assess how they are shifting their policy landscapes in reaction to three “mega trends” shaping the future of work – technological change, demographic shifts, and climate change (see chapter 3). It also views the national responses in the context of the human-centred agenda for the future of work proposed in the Global Commission on the Future of Work report.

These global and regional initiatives have built the knowledge base on the changing nature of the world of work as it unfolds in the region, with particular attention to the necessary policy responses. However, they have not been explicit on the direct impact of future of work issues on labour migration in the ASEAN region, nor have they put forth specific policy responses needed to ensure that migrant workers can contribute and benefit from a just transition to a future of work in the region. This paper pulls together information from a variety of ILO research and resources to help fill this knowledge gap. Linkages can also be made to broader migration and development frameworks promoting a human- and migrant-centred approach (see box 2).

Box 1

A human-centred agenda

The Global Commission on the Future of Work proposed a human-centred agenda for the future of work that strengthens the social contract by placing people and the work they do at the centre of economic and social policy and business practice. This agenda consists of three pillars of action, which in combination would drive growth, equity, and sustainability for present and future generations:

Increasing investment in people's capabilities:

1. Recognize a universal entitlement to lifelong learning and establish an effective lifelong learning system that enables people to acquire skills, upskill, and reskill throughout their life course.
2. Step up investments in the institutions, policies, and strategies that will support people through future of work transitions, building pathways for youth into labour markets, expanding choices for older workers to remain economically active, and proactively preparing workers for labour market transitions.
3. Implement a transformative and measurable agenda for gender equality by making care an equal responsibility of men and women, ensuring accountability for progress, strengthening the collective representation of women, eliminating gender-based discrimination, and ending violence and harassment at work.
4. Strengthen social protection systems to guarantee universal coverage of social protection from birth to old age to workers in all forms of work, including self-employment, based on sustainable financing and the principles of solidarity and risk sharing.

Increasing investment in the institutions of work:

5. Establish a Universal Labour Guarantee that provides a labour protection floor for all workers, which includes fundamental workers' rights, an "adequate living wage", limits on hours of work, and safe and healthy workplaces.
6. Expand time sovereignty by crafting working-time arrangements that give workers greater choice over scheduling and working hours so that they can balance work and private life, subject to the company's needs for greater flexibility, as well as guaranteed minimum hours.
7. Actively promote collective representation of workers and employers and social dialogue through public policies.
8. Harness and manage technology in support of decent work and adopt a "human-in-command" approach to technology.

Increasing investment in decent and sustainable work:

9. Create incentives to promote investments in key areas for decent and sustainable work.
10. Reshape business incentive structures to encourage long-term investments in the real economy and develop supplementary indicators of progress towards well-being, environmental sustainability, and equality.

Source: ILO, 2019f.

Box 2

Ensuring the future is human- and migrant-centred

In 2019, we have seen the confluence of numerous migration and development initiatives, reports, and dialogues on how to ensure that migration governance is improved and the fundamental rights of all migrant workers, as well as the interests of business and government, are better protected.

Recognizing the importance of the future of work and migration, various national and international organizations are looking at the impacts and challenges of the changing world of work and the interrelated role of migration. The ILO Global Commission on the Future of Work, the Global Compact for Safe, Orderly and Regular Migration (GCM), the G20's efforts and agenda on the future of work, and the Special Session of the ASEAN Labour Ministers on the Future of Work are all examples of organizations and meetings looking to address these challenges.

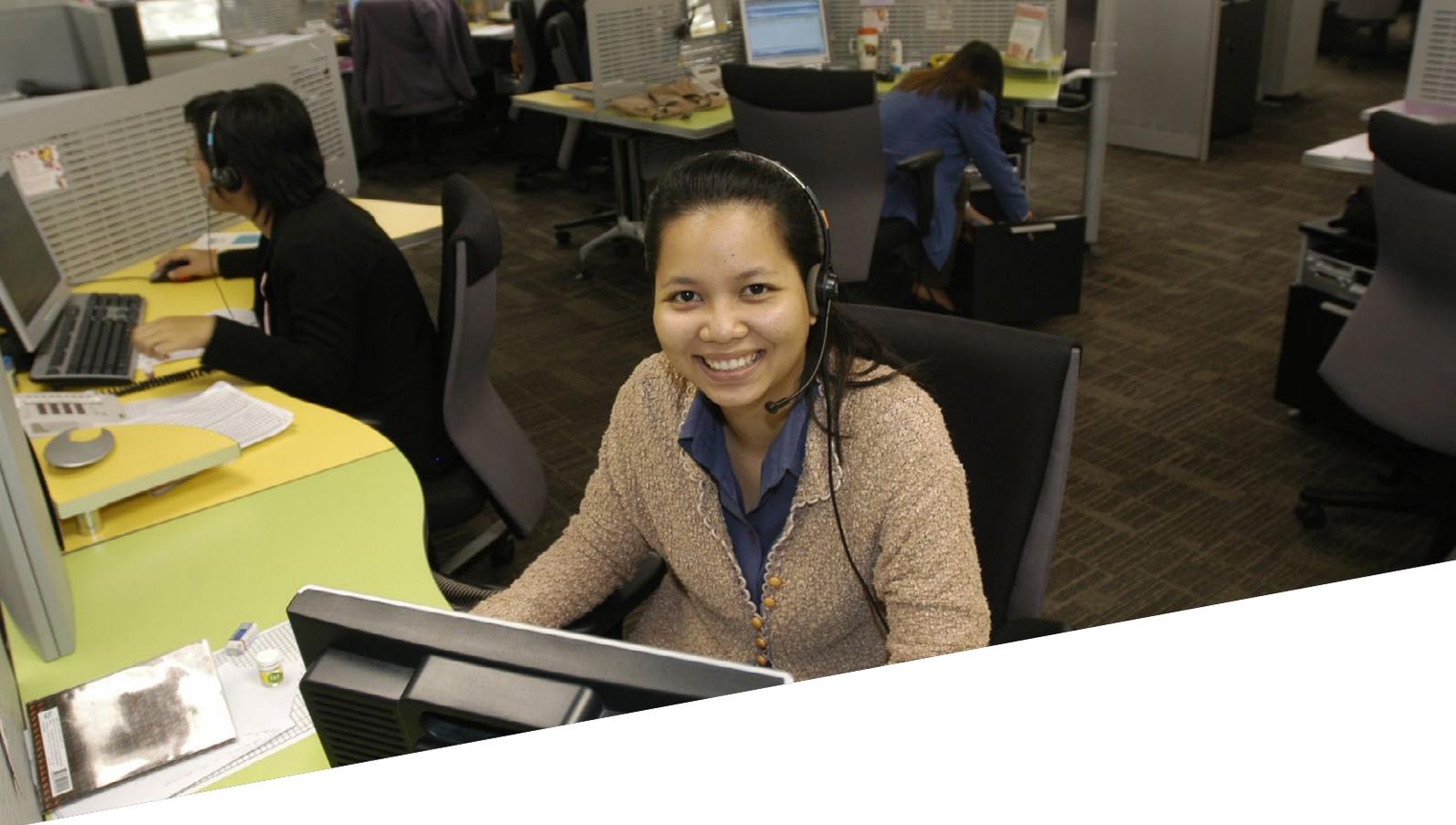
A major driver of human-centred development is the Sustainable Development Goals (SDGs). The SDGs enshrined in 2015 the goal to "leave no one behind" in forging forward to ensure all people are living in peace and prosperity by 2030.

Beginning in 2017, the Organisation for Economic Co-operation and Development (OECD), under the G20 German Presidency, began considering the impact of technology on labour market issues and prepared a report on job quality and the future of work and skills. In 2018, under the G20 Argentinian Presidency, the future of work was set as a cross-cutting theme, spanning the Employment and Education Working Groups, and the Finance track.

The GCM was adopted in December 2018 and recognizes the global challenge of effective migration management, including for migrant workers. The GCM is the first agreement of its kind that comprehensively covers all dimensions and forms of migration. Steered by the Report of the Secretary-General Making migration work for all, the GCM has "people-centred" as a cross-cutting guiding principle to addressing migration. It "promotes the well-being of migrants" and "places individuals at its core".

Echoing these priorities at a regional level, the path for ASEAN Community-building is charted in the "ASEAN 2025: Forging Ahead Together", which was endorsed by the leaders at the 27th ASEAN Summit in 2015. As declared at that Summit, ASEAN is working towards a "politically cohesive, economically integrated, and socially responsible" region. Member States agreed to further efforts towards a people-oriented and people-centred ASEAN Community "where all people, stakeholders and sectors of society can contribute to and enjoy the benefits from a more integrated and connected Community encompassing enhanced cooperation in the political-security, economic and socio-cultural pillars for sustainable, equitable and inclusive development".

Driving from this regional foundation, this AFML is an opportunity to consider in more detail how realization of goals and aspirations across the three pillars of ASEAN will transform labour markets and migration. The AFML also attempts to highlight the human-centred approach within the future of work considerations at the regional level, and ensure centrality of the migrant worker experience in regional planning and processes.



2. Why is labour migration important for future of work in ASEAN?

Labour migration is an established feature of the labour markets in the ASEAN region. Current labour market trends show that an increasing number of ASEAN workers migrate between countries within the region and outside in search for work. UNDESA (2016) estimates that there are currently 20.2 million migrants (48 per cent women) originating from ASEAN countries. The total number of international migrants in the ASEAN region is above 9.7 million, whereof nearly 6.9 million are intra-ASEAN migrants. The number of intra-ASEAN migrants has risen dramatically, increasing from 3.2 million in 1990 (UNDESA, 2016).

Migrant workers constitute a sizeable share of the labour force in the key countries of destination in the ASEAN region. Data from 2017 Labour Force Surveys shows that the share of migrant workers in the total labour force was 24 per cent in Brunei Darussalam, 15 per cent in Malaysia, and 37 per cent in Singapore (see table 1). In Thailand, a 2017 OECD and ILO paper estimates that the economic contribution of immigrant workers ranged from 4.3 per cent to 6.6 per cent of Thailand's gross domestic product (GDP) in 2010, while they represented 4.7 per cent of the employed population (ILO, 2017). Likewise, in countries of origin, if harnessed effectively, migrant workers' remittances and skills upon return have important development impacts for their families, communities, and nations alike through their positive impact on consumption, savings, or investment. According to the World Bank (2015), remittances are making up 10 per cent of GDP in the Philippines, 7 per cent in Viet Nam, 5 per cent in Myanmar, and 3 per cent in Cambodia (World Bank, 2017). Thus, the future of work in the ASEAN region cannot be discussed without taking into account the role, contribution, and protection needs of migrant workers.

Table 1

Share of non-migrant and migrant workers in workforces of Brunei Darussalam, Malaysia, and Singapore, 2017

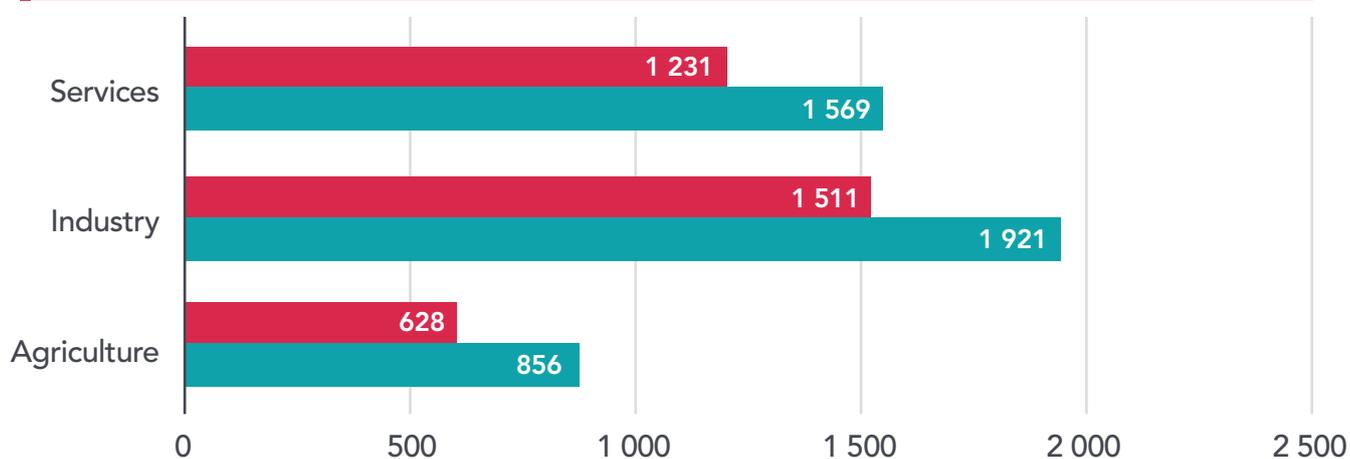
Labour force	Brunei Darussalam	Malaysia	Singapore
All	206 000	14 952 000	3 669 400
Non-migrants	158 000 (76%)	12 678 000 (84%)	2 301 400 (63%)
Migrants	49 000 (24%)	2 274 000 (15%)	1 368 000 (37%)

Source: ILO, 2018a.

Most migrant workers in the ASEAN region are employed in low-skilled, labour-intensive jobs in agriculture, fisheries, domestic work, manufacturing, construction, hospitality, and food services. Official data from Brunei Darussalam, Malaysia, and Thailand show that in 2017 migrant workers were employed in industry (44 per cent), services (36 per cent), and agriculture (20 per cent), with a heavy concentration in elementary-level occupations (66 per cent) (see figures 1 and 2). As the future of work transition is expected to impact the availability of jobs, organization of work, and skills requirements in industry, service, and agriculture alike, it is important for both countries of origin and destination in the ASEAN region to ensure that their migration policies and programmes are ready to respond to these shifts.

Figure 1

Stock of migrant workers in Brunei Darussalam, Malaysia, and Thailand by sector of employment (in thousands), 2013/17

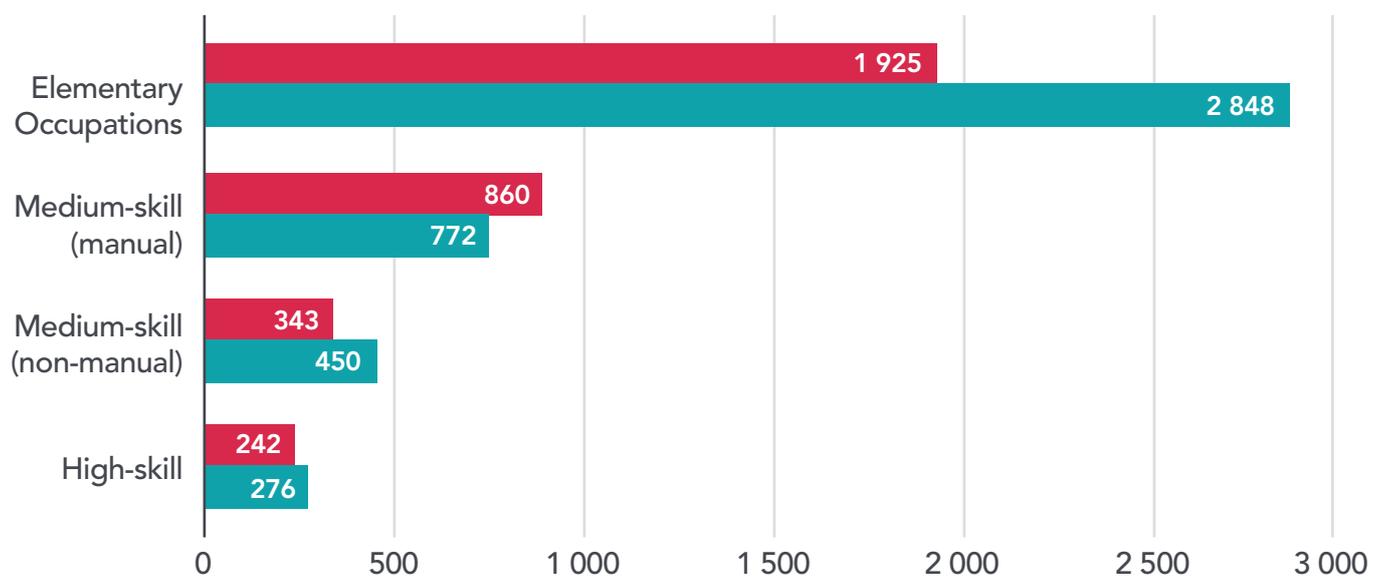


Source: ILO, 2018a.

	Agriculture	Industry	Services
2013	628	1 511	1 231
2017	856	1 921	1 569

Figure 2

Stock of migrant workers in Brunei Darussalam, Malaysia, and Thailand by level of job-skills (in thousands), 2013/17



Source: ILO, 2018a.

	High-skill	Medium-skill (non-manual)	Medium-skill (manual)	Elementary occupations
■ 2013	242	343	860	1 925
■ 2017	276	450	772	2 848



3. A focus on labour migration in future of work trends and national policy responses in ASEAN

New forces are transforming the world of work and the transitions involved call for decisive action. Among these are rapid **technological changes, demographic shifts, and climate change**. This chapter assesses how these three drivers of change impact labour markets in ASEAN and how ASEAN Member States are currently responding through policy responses, with a particular focus on how labour migration fits within the future of work storylines.

3.1 Technological changes

New advances in technology, including artificial intelligence, robotics, blockchains, internet clouds, and 3-D printing will influence the world of work in a variety of ways. Some jobs will be replaced or affected by automation, while many new jobs will be created in the new digital economy. The nature of work – how people work, where they work, and what jobs exist – is also actively being reshaped by new technologies and by the policies that shape their application (ILO, 2019b).

Most ASEAN countries have embraced the vision of technology as a driver of their future economic growth. A recent policy review carried out by the ILO (2019b) found that certain ASEAN countries like Indonesia, Malaysia, the Philippines, Thailand, and Viet Nam have adopted distinct policies on the application of new technologies, in particular “smart” technologies, in the industrial sector (so called Industry 4.0 policies), while other ASEAN countries address adaptation to new technologies through other broader strategies or policies (see appendix I). References to labour migration in these documents seem limited, but relevant strategies in Indonesia, the Philippines, and Viet Nam mention the need to attract foreign talent to further research and development and human resource training, particularly in science, technology, engineering, and mathematics (STEM) fields. Outside ASEAN, interesting examples on inclusion of labour migration in technology strategies can be found, for example in Australia and New Zealand (see box 3).

Box 3

Labour migration and technology strategies in Australia and New Zealand

The digital economy strategy of the Australian Government, entitled **Australia’s Tech Future: Delivering a strong, safe and inclusive digital economy** (2018), mentions skilled migration as an “important way of attracting highly-skilled people who can help grow new opportunities and address short-term gaps”. It recognizes that Australia’s visa system needs to be supportive to compete for skilled workers globally in fields where suitably skilled Australians are not available. In addition, skilled labour migrants are seen as a source to transfer skills to Australian nationals.

In New Zealand, some of the initiatives and action plans pertaining to digital transformation are summarized in the report **Building a digital nation**, launched in March 2017. The report’s strategy aims to use migration policies to bring digital skills into the country. Specifically, it looks at exploring the use of a skills-based approach for the “Long Term Skill Shortage List” and the “Skilled Migrant Category for ICT” occupations, and revises the admission procedure to the above two migration schemes to permit replacing the requirement to provide evidence of the formal qualification with a demonstration of the skills and ability to do the job. The report also reviews the process to become an Accredited Employer, which is the status an employer is required to have to recruit migrants.

Source: ILO, 2019c.

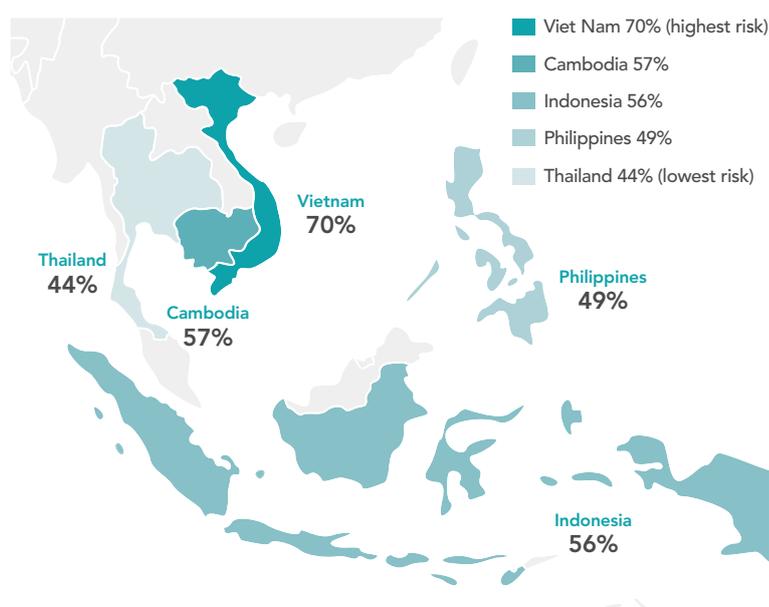
Some key ways in which technological advances are currently impacting the world of work include automation and the emergence of digital labour platforms, both of which impact jobs in migrant-dominated industries. Thus, the questions remain: How will these technological advances impact the availability of jobs for migrant workers and their protection needs in the ASEAN region? What kind of shifts should be anticipated in the formulation of policies and action on the future of work and migration?

3.1.1 Automation

A report published by the ILO in 2016 estimated that total 56 per cent of jobs in the garment sector, computers and electronics, motor vehicles, other manufacturing, and food and beverages in Cambodia, Indonesia, the Philippines, Thailand, and Viet Nam may be impacted by automation over the next 20 years. The jobs most likely to be impacted are those involving repetitive tasks, such as factory workers, retailers, drivers, and office administrators (Chang and Huynh, 2016) (see figure 3). While there is concern that automation can cause job losses, the overall job prospects in ASEAN remain positive (AfDB et al., 2018). Technological change and rising incomes are expected to lead to the creation of new occupations and industries, offsetting labour displacement due to automation. Further, automation is more likely to impact jobs in capital-intensive manufacturing, which currently accounts for only a small share of employment in the region (AfDB et al., 2018). For now, ASEAN countries still favour cheap labour, which remains accessible and is further possible with labour migrants (ILO, 2019b). Nonetheless, new technologies will alter the composition of skills needed by the workforce, including migrant workers.

Figure 3

Percentage of wage workers with high potential for automation by country



How automation will impact migrant workers depends on the kind of jobs they are doing and the tasks that make up the job. A recent study done in the European Union found that as many as 50 per cent of migrants are performing tasks that are not only relatively easy to automate, but also commercially worthwhile to automate. The study also found that migrants are less likely to receive training than national workers, and that this can hamper migrants' opportunities to transition to other jobs should they lose their jobs due to the digital transformation (Gaskell, 2018). Similarly, in ASEAN, it is important to ensure migrant workers' access to skills training, including upskilling and reskilling, to ensure they can contribute to and benefit from the future of work.

3.1.2 Digital labour platforms

With the rise of technology, some occupations may become obsolete, but technology may also create new demand and forms of work, including remote work and in the gig economy. The gig economy refers to service provision where computer software connects service providers with consumers for one-time transactions. Among the most well-known gig economy services are Uber and Grab, both of which connect users to transportation services through a digital platform. In Cambodia, the PASS app allows users to connect with tuk-tuk drivers, and in Indonesia the Go-Jek app allows users to access transportation, pay bills or send money digitally, order food or groceries, and order services to their home like home cleaning, massages, or salon services. Businesses such as these take a fee, but they match service provision and consumption more efficiently; while service providers take a fee for each separate "gig" or request they perform. Digital platforms are expected to expand to connect providers and consumers in the modern service sector, such as with financial services, hospital services, and administrative work.

The digital economy has a great potential to create new jobs, but workers face risks in relation to their status of employment, payments, working time, social protection, and possibilities for recourse, and these risks need to be regulated to ensure adequate protection of workers (Berg et al., 2018). In some countries, digital labour platforms employ large numbers of migrant workers, which has raised concerns about their labour protection due to precariousness of the work, lack of job security, and weak ties to social welfare systems (Bandeira, 2019). While the extent to which migrant workers are employed in the platform economy in ASEAN is unknown, it is recommended that governance systems established for digital labour platforms (and their clients) should be sensitive to protection needs of all workers, and also recognize the specific protection needs of migrant workers.

Box 4

Migrant workers in Colombia's gig economy

Colombia, like many countries, has seen a rise in the use of digital platforms that rely on workers in the gig economy to provide services to users. One example is Rappi, a widely used delivery app that allows digital purchase and delivery from supermarkets, restaurants, pharmacies, and beauty and personal care products, as well as the ability to send and receive money or personal items between customers, and hire help with errands or household tasks. The app is also used in Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, Peru, and Uruguay. Across these countries, 30 per cent of Rappi's employees are migrants. In Colombia, however, Rappi is significantly employed by migrant workers fleeing Venezuela's economic crisis. Access to formal jobs is difficult for Venezuelan migrants; however, many Venezuelan migrants have found work quickly through Rappi. Venezuelan migrants are also thought to have aided the financial success of Rappi. While there is mutual benefit, Rappi, like many gig economy employers, does not offer social protection or consistent financial security to its workers. Furthermore, there is speculation that Venezuelans are hired as a cheaper labour force than local Colombian workers, thus driving down and suppressing wages.

Source: Bandeira, 2019; Rueda, 2019.

In addition, digital tools are increasingly used in labour migration management and in service provision to migrant workers. The benefits and challenges related to digitalization to promote decent work for migrant workers were discussed in the 11th AFML in 2018 (ILO, 2019a).

3.2 Demographic transitions

Demographic shifts and ageing contribute to another "mega trend" in driving the future of work transition in ASEAN. While overall the ASEAN population is growing, the rate of growth is slowing down, approaching 1 per cent a year. The labour force has been getting older in all ASEAN countries, with a steady increase in the median age of workers (ILO, 2019b). ASEAN has some of the fastest ageing populations in the world. In 2000, the total population of ASEAN aged 65 and above was 5.3 per cent. By 2017, it was 6.7 per cent. This figure is set to double to 15.5 per cent by 2035. The total fertility rate in ASEAN has dropped from 5.5 in 1970 to 2.11 in 2017 (Hasnan, 2019). Singapore's resident total fertility rate was 1.14 in 2018 (Department of Statistics, Singapore, 2019).

The pace of population ageing is not even across the region. Within ASEAN, Singapore is considered an “aged” country, meaning its share of population² aged 65+ is between 14 per cent and 20 per cent. Malaysia, Thailand, and Viet Nam all fall within the category of “soon aged”, with the share of population aged 65+ between 7 and 14 per cent. Other ASEAN countries, including Brunei Darussalam, Cambodia, the Lao People’s Democratic Republic, Indonesia, Myanmar, and the Philippines still have large youth populations, but are on the path to becoming ageing within a few decades (see appendix II) (ILO, 2019b).

Population ageing opens up significant opportunities for labour migration to fill the gap in underfilled occupations in countries of destination. As the population ages and fewer nationals participate in the labour force, labour shortages will result in various sectors and occupations, creating opportunities and **pull factors for migration** in sectors with labour shortages. In addition, sectors such as the care economy will require more workers, as domestic workers are often relied upon in the region for elderly care (see box 6). It is important for countries of destination to assess and forecast labour and skills shortages in their labour markets and adjust their migration policies to match the changing demand.

In ASEAN countries with a younger population, the inverse may occur – an oversupply of workers and unemployment. The Philippines and Indonesia have large young populations, noted as a “population bulge”. Cambodia, the Lao People’s Democratic Republic, and Myanmar are projected to have population bulges. Countries with a youth bulge will have a rapidly growing labour force in the short-term, resulting in youth unemployment and potentially a **push factor for labour migration** unless employment opportunities are created locally.

Further, population ageing will put pressure on the pension systems in both countries of origin and destination. For many ASEAN Member States, pension systems (as well as other elements of comprehensive social security systems) require greater expansion and refinement. This is further complicated by the presence of migrant workers, who may or may not be able to properly pay into a pension system or receive coverage if abroad. The informal economy is also a challenge with pension systems (ILO, 2019b).

All ASEAN countries have programmes and policies that relate to promoting a healthy and secure environment for the aged population (see appendix II). All ten ASEAN countries adopted the Kuala Lumpur Declaration on Ageing in 2015, and in so doing pledged to foster concrete action to support the empowerment of older persons. Currently, it seems that strategies on ageing adopted in ASEAN countries do not explicitly propose labour migration as a means to care for older persons or to meet labour shortages in affected industries. An interesting example on labour migration to offset labour shortages can be found in Japan (see box 5). As regards provision of elderly care, national strategies in ASEAN countries combine home care, community care, and institutional care, and note the need for human resource management and training for elderly care personnel (ILO, 2019b; ILO 2019d). It is important to include training of migrant elderly care personnel in these national strategies.

² Based on Singapore’s resident population.

Box 5

Labour migration in Japan's policy framework on ageing

In Japan, the national policy framework on ageing includes measures to promote labour migration to offset labour shortages. Labour immigration reforms with revised visa policies took effect from April 2019. The revised policy allows foreign workers to gain employment in Japan as blue-collar workers for the first time. A two-tiered system is used whereby persons with certain professional skills required to meet the labour needs in 14 industrial sectors can obtain a residency card for up to five years, and workers in high-skilled professions can stay indefinitely (upon renewal of the visa) and settle in Japan with their families. Among the sectors requiring workers are the health-care sector, construction, agriculture, and research and development. The Government is expecting to open up to approximately 345,000 foreign workers, and has allotted the necessary budget to establish 100 consultation centres and Japanese language programmes for foreigners. Foreign workers will be given incentives to spread to rural areas and will be encouraged to enrol in the national health-care system.

Source: ILO, 2019d.

Box 6

The growing demand for migrant workers in the care economy

The Global Commission on the Future of Work report notes that the care economy could generate over 475 million jobs around the world by 2030. Investment in care meets a pressing social need to address rapid population ageing in many countries and opens the way for progress toward gender equality. Transforming the care economy depends on: public investments in quality care services; decent work policies for care workers; support of unpaid care workers wishing to return to paid employment; and the revaluing and formalization of paid care work. New technologies could improve working conditions as well as the reach and delivery of services.

In ASEAN, much of home-based care of the young, the old, and the disabled is provided by domestic workers, many of whom are migrant workers. For example, in Singapore, 49% of resident households in public housing with elderly members aged 65 and above employ foreign domestic workers. In Thailand and Malaysia, the demand for household services, child care, and elder care has increased over the past four decades. Both countries rely heavily on migrant workers.

A study done at Chulalongkorn University, Thailand, estimates that, depending on the level of institutionalization of elder care and adoption of technology, Thailand will need 2.0–3.4 million primary care workers and caregivers by 2030, and 2.4–4.7 million by 2050. The study calls for skills training, skills recognition, and improved conditions of work for domestic workers providing home-based elder care. It concludes that investment in migrant home-based care workers can benefit both countries of origin and Thailand as a country of destination.

Source: Anderson, 2016; Bhula-or, 2019; ILO, 2019f; Ostbye et al., 2013.

3.3 Climate change and the green economy

Climate change and the greening of economies are a third “mega trend” driving the future of work transition. Globally, the progressive greening of economies will create millions of jobs as they adopt sustainable practices and clean technologies, but other jobs will disappear as countries scale back their carbon- and resource-intensive industries. Overall, in Asia and the Pacific, job losses in some sectors are expected to be more than offset by job gains in other sectors by 2030 (ILO, 2019b). Labour migrants from countries experiencing unemployment may be drawn to these new sectors of work and new opportunities. Negative impacts of environmental changes include the collapse of fisheries, soil degradation, atmospheric and water pollution, and the loss of biodiversity. Further, the world is experiencing changes in climate patterns, and more extreme weather conditions, erratic rainfall patterns, and increased vulnerability to disaster events, among others. In response, the changes in environment and climate will result in new sectors and jobs, while other sectors will experience job destruction (ILO, 2019b). Either way, climate and environmental changes will be a driver in labour migration, including, in some cases, forced migration.

The Asia region already experiences the highest percentage of population affected by natural disasters. Thailand and Viet Nam are among the top ten countries most affected by climate change in 2017 alone, and Myanmar, the Philippines, and Viet Nam are among the top ten countries affected during the 1998–2017 period (ILO 2019b). In South-East Asia, coastal flooding poses the greatest climate change-induced risk, with about a third of the population living in at risk areas in Indonesia, Myanmar, Philippines, Thailand, and Viet Nam. Cyclones are another risk that especially affects Indonesia, Myanmar, the Philippines, Thailand, and Viet Nam. Continual degradation of the environment and the livelihoods dependent on it could trigger widespread internal and international migration along established social networks. In this context, existing migration corridors across the region will be extremely sensitive to additional migration arising from climate change (ADB, 2009).

On the positive side, climate change and the green economy can result in job creation, for instance in the area of renewable energy. However, the current share of renewable energy jobs remains very low in ASEAN, comprising, for instance, only 0.7 per cent of employment in Malaysia, only 0.4 per cent in Cambodia, and even less in the remaining ASEAN Member States. Nonetheless, ASEAN leaders recognize the green economy as an area for growth, and have approved a plan that targets a 23 per cent share of renewables in the regional energy by 2025. In addition, total employment in the renewable energy sector grew at an average annual rate of 7.2 per cent between 2012 and 2018. According to ILO estimates, the renewable energy sectors likely to exhibit the highest net employment gains under a scenario of climate change mitigation worldwide would be solar thermal energy, geothermal energy, and wind power. If expanded to employment in environmental processes (waste management, for example), the future potential of decent job creation could be significantly higher. Overall, estimates indicate the possibility for net job creation in Asia and the Pacific (ILO, 2019b).

ASEAN countries adopted the ASEAN Declaration on Promoting Green Jobs for Equity and Inclusive Growth of ASEAN Community in November 2018. At the country level, all ASEAN Member States have a specific strategy related to the greening of economies, whether in regard to climate change mitigation, adaptation, environmental protection, or green growth. A key area is the development of new competencies and skills in new and existing sectors that will be impacted in the greening of economies (see appendix III). The Philippines has an emergency employment programme to support workers internally displaced as a result of calamities and emergency situations, which may be linked to climate change (see box 7). However, none of the ASEAN national strategies meaningfully incorporate labour migration (ILO, 2019e).

Environmental sustainability strategies are not neutral to the labour market, as they create jobs in some sectors or parts of the economy while likely to destroy jobs in others. Indeed, even if the greening of economies will result in net job gains, the impact will vary across sectors and countries and with regard to specific groups of workers, such as migrant workers (ILO 2019b). It is important to recognize and incorporate into strategies the incidents or measures that may result in labour migration, as well as the specific risks and needs that may impact migrant workers.

Box 7

Emergency employment for displaced workers in the Philippines

The Philippines is one country that is severely affected by natural disasters every year. Typhoons contribute to the maximum destruction of infrastructure, property and livelihoods. In the wake of such distress, some of the most vulnerable people are left without savings and income, and in need of a cash inflow in their hands to feel secure. The Government of the Philippines in 2013 offered immediate employment for people in areas hit by typhoon Haiyan, and this benefitted about 79,655 affected workers. The program is through the Department of Labour and Employment Integrated Livelihood and Emergency Employment Program (DILEEP), initiated in 2009 in response to the Global Economic Crisis in cooperation with the ILO. The program does not only put cash in the hands of the affected, but also allows them to acquire new skills while rebuilding light infrastructure in their area. The program offers a minimum wage, social protection, health insurance, and guidance, and such protections can help build the resilience of people facing natural disasters risks.

The funds allocated to the Emergency Employment Program in the Philippines are consistently increasing every year. The allocation for the year 2019 is 106 per cent more than what was allocated in 2018. DILEEP offers decent work in an event of a natural calamity and loss of livelihood. This is one success model that could be put to use in other countries that face similar disasters, considering that climate change can cause more severe disasters and corresponding loss of livelihoods in the near future.

Sources: ILO, 2015; Department of Budget and Management, 2019.



4. Ensuring a just future of work transition for migrant workers

The previous chapter has looked at three “mega trends” driving future of work transition and the current policy responses put in place in ASEAN countries to facilitate the transition. This chapter explores how labour migration policy can be adjusted to ensure that migrant workers are better protected as ASEAN harnesses the development potential of labour migration within the region’s future of work transition. The discussion focuses on some key points from the human-centred agenda for the future of work (see box 1 above) that are particularly relevant in the context of labour migration, structured under the two sub-themes of the 12th AFML theme “Future of Work and Migration”.

4.1 Sub-theme 1 – Sustainable, fair, and equal protection of migrant workers

Migrant workers are among the most disadvantaged in access to labour and social protection, support services, and representation among the ASEAN workforce. To ensure a just transition, efforts need to be stepped up to ensure sustainable, fair, and equal protection for this group of workers.

4.1.1 Ensuring labour protection of migrant workers, including in the new economies and forms of employment

The human-centred agenda for the future of work highlights, among other things, that all workers should enjoy fundamental workers' rights, an adequate living wage, maximum limits on working hours, and protection of safety and health at work (Universal Labour Guarantee). All workers, regardless of their employment status, or migrant status, must equally enjoy adequate labour protection to ensure humane working conditions for everyone. (ILO, 2019f.)

As the organization of work changes, new ways need to be found to protect all workers, whether they are in full-time employment, executing micro-tasks online, engaged in home-based production, or working on a temporary contract. Efforts are also needed to ensure that jobs in the "new economies" – the green economy, the digital economy, and the care economy – are decent and sustainable (ILO, 2019f).

While substantive progress has been made in the ASEAN region, realization of equal labour protection for migrant workers compared to national workers remains a challenge. Most migrant workers in the region are employed in low-skilled, labour-intensive jobs in agriculture, fisheries, domestic work, manufacturing, construction, hospitality, and food services, where conditions of work are tough and enforcement of labour and social security laws is weak. Some of these occupations, including domestic work, agriculture, and fishing, are often classified as informal in national legislation and thus excluded from labour protections awarded to workers in the formal economy. More efforts are needed by governments and social partners in the region to ensure labour protection throughout the migration cycle. Particular efforts are needed to ensure equal opportunities and treatment of women migrant workers, including equal pay for work of equal value, and their protection against discrimination, harassment, and violence.

Noting the anticipated growth of the care economy in ASEAN (see section 3.2), ensuring labour protection of migrant workers in the care sector should be considered a priority in the region. As care for the old, the young, and those with disabilities is in many ASEAN countries largely provided by domestic workers, including increasingly by migrant domestic workers, ensuring effective protection and fair treatment of domestic workers in the workplace, particularly migrant domestic workers, needs to be part of care sector strategies in the region. As the demand for skilled home-based care workers increases, there should also be consideration for systems in place for skills recognition and mobility of skilled domestic care workers (see box 6).

The digital economy, especially digital labour platforms (the "platform economy") like Grab, Uber, and Foodpanda, has a great potential to create new jobs for migrant workers in services, such as driving, running errands, or cleaning houses (see section 3.1.2). While the extent to which migrant workers are employed in the platform economy in ASEAN is unknown, it is recommended that governance systems established for digital labour platforms (and their clients) are sensitive to the protection needs of all workers, including migrant workers.

4.1.2 Fair recruitment

An essential component in the protection of migrant workers' rights is ensuring their protection during the recruitment and placement process. In an increasingly integrated ASEAN, where millions of workers migrate internally in search of decent work, public and private employment agencies, when appropriately regulated, play an important role in the efficient and equitable functioning of labour markets by matching available jobs with suitably qualified workers. However, at the same time, recruitment in ASEAN is to

some degree characterized by dishonest employment agencies, informal labour intermediaries, and other operators acting outside the legal framework. Despite the existence of national laws and international labour standards relating to recruitment, enforcement often falls short of protecting the rights of migrant workers.

Low-skilled workers are particularly vulnerable to falling prey to unscrupulous actors in the recruitment process. Research shows that recruitment-related abuses include: deception about the nature and conditions of work; retention of passports; illegal wage deductions; debt bondage linked to repayment of recruitment fees; and, very commonly, charging of exorbitant recruitment-related costs and fees.

At the global level, there is a consensus that promoting fair recruitment, including eliminating worker-paid recruitment costs and fees, is an important priority within labour migration governance. This is manifested for example by the adoption of Indicator 10.7.1 – “Recruitment cost borne by employee as a proportion of yearly income earned in country of destination” – within the monitoring framework of the Sustainable Development Goals.

Moving forward, it is clear that a just transition to the future of work for migrant workers in ASEAN requires clear and transparent regulation of recruitment agencies, with a view towards prohibition of the charging of recruitment fees or related costs to workers, and strict enforcement of such policies.

4.1.3 Advancing portability of social protection

ASEAN Member States have made significant progress in expanding social security coverage of migrant workers in the last 10–20 years. In Thailand, for example, through intensified regularization efforts, the number of migrant workers enrolled under the national Social Security Office almost tripled from 462,217 to 1,201,867 individuals from 2017 to 2018. However, effective access to social protection remains a challenge for a large majority in ASEAN, and migrant workers remain among the least protected in the region (Olivier, 2018). A study surveying 1,808 migrant workers in Cambodia, the Lao People’s Democratic Republic, Myanmar, and Viet Nam upon their return from Malaysia and Thailand, found that just 28 per cent enrolled in a public or private benefit scheme, such as social security, worker’s compensation, or health insurance (Harkins, Lindgren, and Suravoranon, 2017).

The human-centred agenda for the future of work calls for providing universal social protection from birth to old age (ILO, 2019f). Realization of over-the-life-cycle social protection for mobile populations, such as migrant workers in ASEAN, requires the establishment of bilateral (or multilateral) social security agreements, as appropriate, based on principles of totalization of insurance periods and maintenance of benefits. Due to a current absence of arrangements for portability of social security in ASEAN, migrant workers are often unable to meet the eligibility criteria for long-term benefits such as old-age pensions, which may require ten or 20 years of contributions. Other challenges impeding migrant workers’ access to social security include: unequal benefits provided through specific schemes for the social protection of migrant workers; bureaucratic and administrative barriers; and inadequate time to claim and finalize social security benefit payments upon termination of employment. Migrant workers also often work in economic sectors that are not covered by social security or where compliance is poorly enforced (e.g., domestic work) or in small businesses that are excluded from social protection (ILO, 2018b).

In addition to enabling portability, social protection needs to adjust to shifts in the organization of work. Social protection systems will need to evolve to deliver continued protection for workers who move between wage employment and self-employment, or between different enterprises, sectors, or countries, ensuring that rights and benefits are accessible and portable, including for those working on digital platforms (ILO, 2019f).

4.1.4 Ensuring migrant workers' voice and representation

The human-centred agenda for the future of work calls for ensuring collective representation of workers and employers through social dialogue. Organizing migrant workers in trade unions and ensuring their representation in social dialogue and collective bargaining remains a challenge in ASEAN. One obstacle to union membership among migrant workers is that they often work in informal sectors that do not have a significant history of organizing, such as agricultural work, domestic work, and fishing. In some countries of destination, migrants are also prohibited from forming their own unions or serving in leadership roles in existing unions, which may limit their ability to voice their specific concerns. Operating environments for trade unions remain challenging as migrants often cannot remain in-country long enough to benefit from collective bargaining agreements and/or are reluctant to actively engage with trade unions due to fear of retaliatory dismissal and deportation (Harkins, Lindgren, and Suravoranon, 2017; Harkins, 2016).

4.2 Sub-theme 2 – Migrant workers' employability

There is consensus that the future of work requires a workforce that is agile, with adaptable skills and the ability to perform well. To harness the development potential of labour migration for the region's successful future of work transition, there is a need to make migration policies less cumbersome, more flexible, and cheaper, and to ensure that they respond to real and projected labour and skills shortages in countries of destination. There is also a need to expand mobility options for women migrant workers. While the future of work is not only high-skilled, efforts should be stepped up to upskill and reskill migrant workers, and to facilitate intra-ASEAN mobility for workers at all skills levels.

4.2.1 Reduction of irregular migration by coherent and efficient migration policies and processes

The human-centred agenda for the future of work calls for stepping up investment in the institutions, policies, and strategies that will support people through future of work transitions (ILO, 2019f). In relation to labour migration, this requires adopting coherent and stable labour migration policies and improving the effectiveness of migration processes to make regular migration channels faster, cheaper, and more accessible, all with the aim of reducing irregular migration in the region. Coherent policies and effective processes will be beneficial both for migrant workers and their employers, and help reduce undocumented labour migration as these policies and processes become easier to understand and comply with.

A 2017 study by the ILO and IOM compared the effectiveness of migration channels from Cambodia, the Lao People's Democratic Republic, Myanmar, and Viet Nam to Thailand and Malaysia in terms of the time taken to migrate, average cost of migrating, and the extent to which migrant workers experienced problems during the migration process. The study found that the process for migrating regularly took more than three times longer (104 vs. 33 days) and was three times the cost (US\$881 vs. US\$265) of irregular channels, but that migrant workers using irregular channels were also nearly twice as likely to encounter problems during the migration process (51 vs. 26 per cent) (Harkins, Lindgren, and Suravoranon, 2017). These findings clearly highlight that efforts to reduce irregular migration in the region need to focus on making regular migration channels faster, cheaper, and more accessible.

Additionally, policies in ASEAN countries of destination provide very limited opportunities for migrant workers to change employers. This not only hinders the protection of migrant workers' rights, but also results in inefficient labour markets and contributes to high recruitment costs. Recent policy changes in Singapore have made the hiring of existing foreign workers in the construction, process and marine sectors easier. Similar changes are needed in other countries and economic sectors to save both the worker and the employer time and money (Kouba and Baruah, 2019).

Improved policies should also repeal all gender-based restrictions on labour migration. Many countries in the ASEAN region control women's labour migration with measures ranging from outright migration bans to restrictions relating to age and marital status (typically prohibiting women from migrating for domestic work). Though intended to protect women from harm, research by the ILO and UN Women shows that they in fact leave women with less protection, as the absence of formal channels for migration prompts more women to choose to migrate through more risky irregular channels (Napier-Moore, 2017).

4.2.2 Assessing labour and skills shortages to inform migration policies

Labour migration policies also need to better respond to the labour and skills shortages in migrant-reliant industries, including the new care, green, and digital economies. To match supply and demand, it is essential for ASEAN countries of destination to improve systematic assessments of current and future skills and labour shortages to inform their policies on admission of migrant workers. Information on skills and labour shortages should be shared with countries of origin, as appropriate, to inform their technical and vocational education and training (TVET) systems and their preparation of outgoing migrant workers.

Currently, in the ASEAN region, Malaysia and Singapore make some systematic assessments (to a lesser or greater extent) of skills and labour shortages to support the functioning of their labour markets and to inform migrant labour recruitment (ILO, forthcoming). Singapore has adopted a differentiated work pass framework where privileges and controls are calibrated along the skills continuum. Broadly, there are three types of work passes for foreign workers in Singapore, as follows:

1. Employment Pass for foreign professionals, managers and executives (PMEs);
2. S Pass for mid-level skilled workers; and
3. Work Permits for semi-skilled workers.

Employment Pass and S Pass holders need to meet the salary threshold and possess the relevant qualifications, while firm-level quotas and levies are imposed on S Pass and Work Permit Holders, to encourage businesses to be more productive and manpower-lean. Quotas and levies will vary depending on the skills level of the foreign workers and the sector to which they will be deployed (Ministry of Manpower, Singapore, 2019).

Malaysia has a twin-track labour migration policy with different admission criteria for admission of "foreign workers" (workers in elementary occupations) and "expatriates" (high-skilled workers in managerial, professional, or technical positions). Admission systems for "foreign workers" apply enterprise-level quotas linked to the number of locals employed (called a dependency ratio) and charge a levy on employers as a disincentive for hiring migrant workers and to encourage domestic hiring. A recent ILO review found no information about systematic assessments of skills and labour shortages to inform migrant worker recruitment in Thailand, which happens through memoranda of understanding (MOUs) between Thailand and countries of origin (ILO, forthcoming).

Box 8

How to carry out systematic assessment of labour and skills shortages?

Main data sources and methods:

- Information about unfilled vacancies: Administrative sources at public employment services.
- Employer surveys: Insights on current trends and elements for projecting data into the future.
- Labour force surveys and censuses: Labour supply-side and demographic information to assess trends in skills and occupations profiles.
- Model-based projections: Sophisticated and data-demanding method for labour market needs assessment, e.g., in Australia, Canada, and the United States.
- Specific sectoral studies: Assess the drivers of the future evolution of the sector, e.g., in the European Union.

Source: ILO, forthcoming.

4.2.3 Skills development and skills recognition

More effort needs to be made to upskill and reskill migrant workers, and to facilitate intra-ASEAN mobility of workers at all skills levels. The human-centred agenda for the future of work calls for lifelong learning for all. This will be key for people to be able to benefit from new technologies and the new work tasks that will follow (ILO, 2019f).

Currently, intra-ASEAN labour migration is heavily concentrated in low-skilled migration for elementary occupations. This, however, does not always mean that migrant workers have no skills, but highlights that their skills are not utilized or recognized in the migration process. An ILO and IOM survey of 1,808 Cambodia, Lao People's Democratic Republic, Myanmar, and Viet Nam migrant workers upon their return from Thailand or Malaysia found that upon recruitment only 12 per cent of migrant workers were matched in jobs that were relevant for their skills, while 26 per cent said some of their skills were relevant for the job. About 62 per cent of the surveyed migrant workers were matched with jobs for which they had no relevant skills. On the other hand, 69 per cent of the respondents said they had developed one or more skills during their time in destination countries, but only 16 per cent were able to apply their new skills upon returning home (Harkins, Lindgren, and Suravoranon, 2017). The findings highlight that there is a need to improve skills recognition and utilization both at the recruitment stage and upon return home. Measures taken need to take into account different skills profiles of migrant workers in different intra-ASEAN migration corridors (see box 10).

The ILO and IOM study found that about 50 per cent of the surveyed migrant workers received training in their destination country. On-the-job training was by far the most common form of training (40 per cent). A sizeable portion also stated that training was not available for them (35 per cent), while many said they did not see any benefit of training (28 per cent) or did not think they had enough time (19 per cent). Some

were also concerned that they would lose their job or be penalized as a result of taking time off for training (Harkins, Lindgren, and Suravoranon, 2017). It is necessary for governments and employers to ensure migrant workers' access to training to reskill and upskill themselves.

Box 9

Enabling mobility for care workers at all skills levels

Care workers include a wide range of workers who differ in terms of education, skills, sector, and pay – from university professors, doctors, and dentists at one end of the spectrum, to childcare workers and personal care workers at the other. As providers of personal and household services in private homes, domestic workers are an essential part of the care workforce. Skills recognition and certification present major obstacles for migrant care workers.

As the demand for migrant care workers is expected to increase (see box 6), it is essential to enable mobility of care workers at all skills levels within ASEAN. While the ASEAN mutual recognition agreements (MRAs) on medical practitioners, nursing, and dental practitioners may facilitate mobility of care workers belonging to these groups, more efforts are needed on skills recognition for qualified home-based care workers.

Responding to the growing demand for skilled home-based migrant care workers, in 2018 the Philippine Overseas Employment Administration classified caregivers under the middle-skilled major group “Services and Sales Workers” as per the International Standard Classification of Occupations (ISCO-2008), thereby noting that such a position is not classified as a domestic worker. Further, to facilitate mobility of home-based caregivers, the Philippines Department of Labor and Employment concluded a bilateral agreement with Israel to establish a government-to-government arrangement on employment of Filipino home-based caregivers with necessary qualifications and skills in Israel. Such mobility systems for skilled home-based care workers could also be promoted within ASEAN.

Systems for skills recognition and mobility for skilled home-based care workers need to guarantee salaries equivalent to the workers' skills level. No recruitment fees or related costs should be charged to workers at any skills level.

Source: ILO, 2018c; POEA, 2018; DOLE, 2018.

The ASEAN region is currently lacking systems for medium-skilled labour mobility and mutual recognition of skills for medium-skilled (technical and vocational) occupations, as the eight mutual recognition agreements (MRAs) implemented in ASEAN cater mainly to high-skilled workers, who currently make up a small minority of intra-ASEAN migration flows. Some ASEAN countries have mobility policies for medium-skilled workers migrating to countries outside ASEAN, which could inform similar frameworks for medium-skilled mobility within ASEAN (see box 9). The ILO is currently supporting ASEAN Member States in piloting mutual recognition systems (MRS) for formally adopted qualifications in several occupations and recognition of prior learning (RPL) for informally obtained skills. These approaches, when fully rolled out, have a great potential to improve skills matching and skills utilization for a large population of middle-skilled workers in the ASEAN region.

Box 10

Skills and migration in Malaysia and Thailand

Thailand's official government statistics show that the majority of migrant workers entering the country have only a basic level of education, with the share increasing from 72 per cent in 2007 to 81 per cent in 2016. Correspondingly, about 90 per cent of migrant workers (1.88 million) worked in elementary occupations in Thailand in 2017. This highlights the importance of technical and vocational education and training (TVET) in Thailand and in countries of origin (Cambodia, the Lao People's Democratic Republic, and Myanmar) to meeting future skills demands in Thailand's changing labour market. More attention needs to also be paid to implementing skills recognition systems, and to opening up middle-skilled migration channels between these countries.

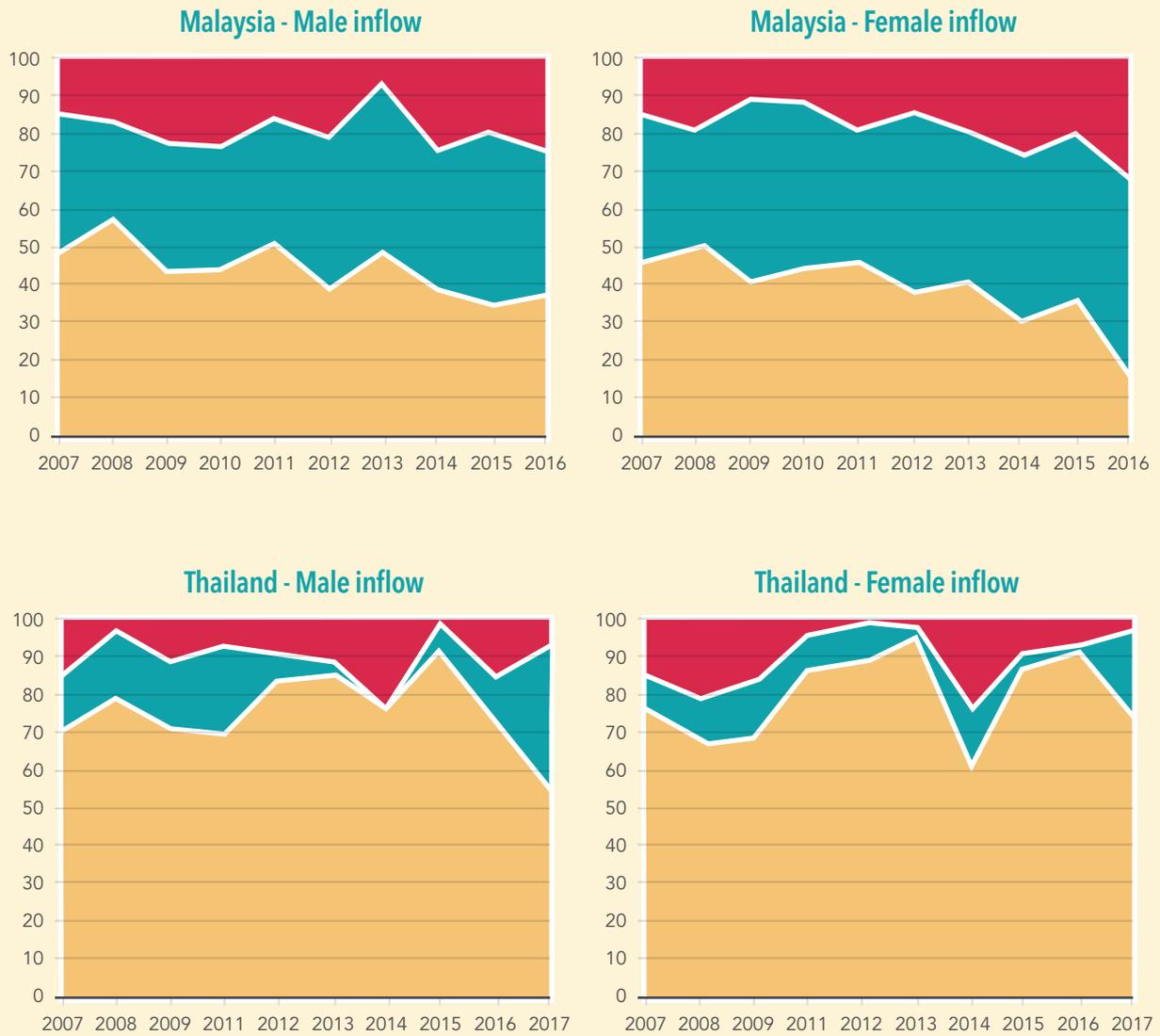
In Malaysia, the inflow of migrant workers with an intermediate or advanced level of education has increased from 53 per cent in 2007 to 72 per cent in 2016. The increase was particularly sharp for women, with the share of women migrant workers with intermediate or advanced levels of education increasing from 55 per cent in 2012 to 85 per cent in 2016. Among men migrant workers, 62 and 65 per cent had intermediate or advanced education in 2012 and 2016, respectively (see figure 4). Notwithstanding this, 42 per cent of migrant workers were employed in elementary occupations in 2017. This points to underutilization of migrant workers skills in high-skills jobs and medium-skills jobs in Malaysia, and calls for improved skills recognition and opening up middle-skilled migration channels to maximize productivity of Malaysia's economy.

It should, however, be remembered that the future of work is not only high-skilled. Investing in skills development is a worthy policy goal, but it is important to note that there will never be a sufficient quantity of high-skilled jobs to absorb all workers in the country. Nor should there be, since lower-skilled work also remains in high demand. Low-skilled work has immense value for the functioning of societies, and its value has the potential to increase further as supplies shrink. The hope is that wages will rise and conditions of work will improve for low-skilled workers as their market value increases (ILO, 2019b).

Figure 4

Share of migrant workers in Malaysia and Thailand by gender and level of education, 2007–2016(%)

Basic Intermediate Advanced



Source: ILO, 2018a.



5. Recommendations

Labour migration is an established feature in the ASEAN region, and the future of work in the region will likely also be characterized by increasing internationalization and mobility. Migrant workers contribute to the development of societies and economies of countries of origin and destination alike. It is critical to ensure the protection of migrant workers' labour rights as the region harnesses the development potential of labour migration within its future of work transition. For this reason, further efforts are needed to ensure a just future of work transition for migrant workers in ASEAN.

In light of this background review, the ILO suggests the following key recommendations for consideration by ASEAN Member States.

Sub-theme 1 – Sustainable, fair, and equal protection of migrant workers

1. Improve **labour protection** of migrant workers in all sectors and occupations, including the care, green, and digital economies and in informal and non-standard forms of employment. Where practical, the protection should be gender-responsive and equal to protection of national workers, and should cover issues such as fundamental workers' rights, an adequate wage, limits on hours of work, and safe and healthy workplaces.

2. Ensure **fair recruitment** of migrant workers through clear and transparent regulation of recruitment agencies and by working towards the eventual prohibition of charging of recruitment fees or related costs to workers.
3. Enable **portability of social protection** through negotiation of bilateral or multilateral social security agreements, as necessary, to realize social protection for women and men migrant workers from birth to old age. Social protection should be extended to also cover migrant workers in non-standard forms of employment.
4. Promote **organizing of migrant workers** in trade unions and associations, and ensure the voice and representation of migrant workers, irrespective of gender, in collective bargaining and social dialogue on shifts that affect their employment.

Sub-theme 2 – Migrant workers' employability

5. Reduce irregular migration by adopting **coherent and stable labour migration policies and improve effectiveness of migration processes** to make migration through regular channels migration faster, cheaper, and more accessible. Measures should include the removal of gender-based migration bans to expand mobility options for women, and allowing migrant workers to change employers.
6. Improve systems for **assessing demand for migrant workers** in relevant sectors, occupations, and at all skills levels to inform admission policies in countries of destination, and **share this information**, as appropriate, with countries of origin to inform their training programmes and preparation of outgoing migrant workers.
7. Improve **migrant workers' access to technical and soft skills training, reskilling, and upskilling**, and improve **systems for recognition of formal qualifications and informally gained skills** at different stages of the migration cycle. The measures should include promoting women's access to training in non-traditional sectors and occupations.

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Appendix I. National industry 4.0 strategic plans in ASEAN

Country	I4.0 strategy	Other recent strategies and policies addressing adaptation to new technologies
Brunei Darussalam	No distinct plan	<ul style="list-style-type: none"> • Brunei Vision 2035 (Wawasan 2035)
Cambodia	No distinct plan	<ul style="list-style-type: none"> • Rectangular Strategy for Growth, Employment, Equity and Efficiency, Phase IV (September 2018); • National Science and Technology Master Plan 2014–2020; • ICT Masterplan 2020
Indonesia	Making Indonesia 4.0 (MI4.0)	<ul style="list-style-type: none"> • National Long Term Development Plan 2005–2025; • National Medium Term Development Plan 2015–2019; • Master Plan of National Industry Development 2015–2035
Lao People's Democratic Republic	No distinct plan	<ul style="list-style-type: none"> • Ten-year Socio-economic Development Strategy 2016–2025; • 8th Five-year National Social and Economic Development Plan 2016–2020
Malaysia	National Policy on Industry 4.0 (Industry4WRD)	<ul style="list-style-type: none"> • Eleventh Malaysia Plan 2016–2020
Myanmar	No distinct plan	<ul style="list-style-type: none"> • Myanmar Sustainable Development Plan 2018–2030; • Industrial Policy (2016)
Philippines	Inclusive Innovation Industrial Strategy (i3S)	<ul style="list-style-type: none"> • Philippine Development Plan 2017–2022
Singapore	No distinct plan	<ul style="list-style-type: none"> • Industry Transformation Maps; • Smart Nation; • Future of Manufacturing Initiative; • Digital Economy Framework for Action
Thailand	Thailand 4.0	<ul style="list-style-type: none"> • Twelfth National Economic and Social Development Plan 2017–2021; • Twenty-year National Strategy 2018–2037
Viet Nam	National Industrial Development Policy until 2030 with a vision toward 2045	<ul style="list-style-type: none"> • Directive No. 16 (Ct-Ttg) on Strengthening Viet Nam's capacity to leverage the 4th Industrial Revolution (2017); • Socio-economic Development Plan 2016–2020; • Strategy for Science and Technology Development 2011–2020; • Plan on economic restructuring in association with conversion of the growth model towards improving quality, efficiency and competitiveness 2016–2020

Source: ILO, 2019b.

Appendix II. Recent strategies and policies linked to population ageing in ASEAN

Country	Ageing status	Strategies or plans addressing demographic changes (ageing)	Action areas linked to labour markets
Brunei Darussalam	Not yet ageing	Not found National Ageing Policy 2017–2030	<ul style="list-style-type: none"> • Extended retirement age to 60; • Universal old-age pension
Cambodia	Not yet ageing	National Population Policy 2016–2030 Law No. 13/1998 on the Welfare of Older Persons	<ul style="list-style-type: none"> • Skills development; • Social assistance; • Access to finance for the elderly; • Human resource management and training for elderly care personnel; • Evaluating old-age pension; • Preventing age discrimination; • Promoting community-based elderly associations
Indonesia	Not yet ageing	Regulation No. 43/2004 on Older Persons Welfare Improvement Efforts National Policy for the Elderly 2004	<ul style="list-style-type: none"> • Social assistance; • Extending social protection; • Expanding health centres; • Senior-friendly transport; • Skills development; • Human resource management and training for elderly care personnel; • Home care programme
Lao People's Democratic Republic	Not yet ageing	Second National Policy for Older Persons and Plan of Action for Older Persons 2010–2015	<ul style="list-style-type: none"> • Social assistance; • Skills development; • Home care programme; • Promoting community care
Malaysia	Not yet ageing	The Plan of Action for Older Persons 1999	<ul style="list-style-type: none"> • Extended retirement age to 60; • Social assistance; • Skills development; • Extending social protection; • Expanding health centres; • Preventing age discrimination; • Human resource management and training for elderly care personnel; • Home care programme; • Promoting community care • Access to finance for the

Myanmar	Not yet ageing	National Plan on Ageing 2014 Elderly People Law	elderly; <ul style="list-style-type: none"> • Skills development; • Subsidies to encourage employment of the elderly;
Philippines	Not yet ageing	Expanded Senior Citizens' Act 2010 National Action Plan for Senior Citizens 2011–2016	<ul style="list-style-type: none"> • Promoting community-based elderly associations • Promoting community care; • Skills development; • Job placement programmes; • Subsidies to encourage employment of the elderly; • Social assistance; • Regional health centres and home care; • Extending social protection
Singapore	Aged Ageing Ageing	Action Plan for Successful Ageing	<ul style="list-style-type: none"> • Retirement age will be increased from 62 to 65 by 2030, re-employment age will correspondingly be increased from 67 to 70. • Subsidies to encourage employment of the elderly; • Flexible work options for the elderly; • Skills development; • Human resource management and training for elderly care personnel; • Extending social protection; • Social assistance;
Thailand		Older Persons' Act 2003	<ul style="list-style-type: none"> • Gradual extension of retirement age to 63 by 2024 (public sector only); • Job placement programmes; Preferential loans for business start-ups; • Human resource management and training for elderly care personnel; • Subsidies to encourage employment of the elderly; • Support for home care;
Viet Nam		Second National Plan on the Elderly 2002– 2021 Law on the Elderly 39/2009 National action plan on elderly people for 2012–2020 (2012) Strategy on population and reproductive health for 2011–2020	<ul style="list-style-type: none"> • Extending social protection; • Social assistance; • Skills development • Extending social protection; • Social assistance; • Regional health centres and home care; • Preferential loans for business start-ups; • Skills development

Source: ILO, 2019b.

Appendix III. Recent strategies and policies linked to environmental and climate change in ASEAN

Country	Year of adoption	Strategies, plans and policie
Brunei Darussalam	2013	Energy White Paper
Cambodia	2013 2013 2013	– Cambodia Climate Change Strategic Plan 2014–2023 – National Policy on Green Growth – National Strategic Plan on Green Growth 2013–2030
Indonesia	2015 2014	– Delivering Green Growth for a Prosperous Indonesia: A roadmap for policy, planning, and investment – Green Planning and Budgeting Strategy for Indonesia’s Sustainable Development 2015–2020
Lao People’s Democratic Republic	2010 2009	– Strategy on Climate Change of the Lao People’s Democratic Republic – National Adaptation Programme of Action to Climate Change
Malaysia	2010	– National Policy on Climate Change
Myanmar	2019 2019 2018	– National Environmental Policy, 2030 Strategy and Master Plan – Myanmar Climate Change Strategy and Action Plan 2018–2030 – Green Economy Policy Framework
Philippines	2016	– Green Jobs Act
Singapore	2019 2017 2016 2015	– Zero Waste Masterplan – Environmental Services Industry Transformation Map – Climate Action Plan – Sustainable Singapore Blueprint 2015-
Thailand	2015	– Master Plan on Climate Change 2015–2050
Viet Nam	2012 2012 2012 2011	– National Strategy on Environment Protection to 2020, with Visions to 2030 – National Action Plan to Respond to Climate Change – National Green Growth Strategy – National Strategy on Climate Change

Source: ILO, 2019b.



The future of work and migration: 12th ASEAN Forum on Migrant Labour (AFML) thematic background paper

This paper was prepared to inform and guide the discussions on “Future of Work and Migration” at the 12th ASEAN Forum on Migrant Labour (AFML) held from 25 to 26 September 2019 in Bangkok, Thailand. The AFML is a tripartite meeting that brings together governments, employers’ organizations, and workers’ organizations, alongside civil society organizations, to discuss migration governance issues across the Association of Southeast Asian Nations (ASEAN) region, and aims to promote and protect migrant workers’ rights. The AFML is supported by the International Labour Organization (ILO) through its TRIANGLE in ASEAN programme, the International Organization for Migration (IOM), and UN Women.

This background paper was prepared to encourage consideration of migration governance in the context of the future of work transition, and proposes recommendations on addressing some of the specific migration challenges within the future of work.

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