Assessing Potential
Changes in the Migration Patterns of
MYANMAR MIGRANTS
and their Impacts on Thailand

Conducted by
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Country Mission in Thailand
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ASSESSING POTENTIAL CHANGES IN THE MIGRATION PATTERNS OF MYANMAR MIGRANTS AND THEIR IMPACTS ON THAILAND
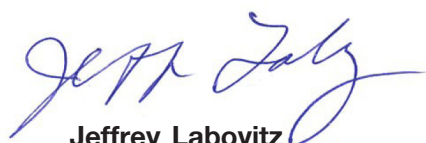
Foreword

Migration is the consequence of a multifaceted decision by an individual to move from one place to another, usually in search of a better life. Factors affecting the decision to move, which exist in places of both origin and destination, could be economic, social, security- and safety-related, environmental or personal in nature. The decision to migrate, to reside temporarily, to integrate permanently into the local society, or to return to the place of origin, changes as the conditions shaping these factors change.

How does the current economic and political transformation in Myanmar impact on the decision of Myanmar nationals to migrate, not to migrate, or to return? The factors affecting their original migration decisions have been changing significantly in Myanmar. After decades of military dictatorship, the country is in the process of instituting a functioning legislative system and has taken some significant steps toward ethnic reconciliation. To date, most of the economic sanctions imposed by other countries have been lifted, and Myanmar has begun to attract attention from businesses worldwide as the "last frontier of Asia". Assuming consistent growth that leads to ample employment opportunities with decent levels of income, good living conditions, a functioning democracy and lasting peace, it is logical to think that the migration patterns of Myanmar nationals would also start to change.

We believe that the economic and political transformations in Myanmar, and the impacts of these transformations on the migration patterns of Myanmar nationals, are of particular relevance to Thailand, owing to the country's reliance on Myanmar migrant workers, who are concentrated in certain specific job sectors. Simply put, Thailand – having experienced years of healthy economic growth and one of the world's lowest unemployment rates and smallest labour shortages, particularly in low-skilled and low-wage employment sectors – needs migrant workers. In the past, the availability of millions of Myanmar workers was taken for granted.

For many years, Myanmar (as well as Cambodian and Laotian) migrant workers have worked and contributed to the steady growth of the Thai economy. Many of them were paid below the minimum wage and worked under harsh conditions. Even after several years of regularization opportunities, many remain undocumented. How easily can they be replaced by migrants from other countries, especially if the current business set-ups are based on the hardworking, non-complaining and low-cost labourers from the other side of the border who can easily make themselves available to the Thai labour market? Or is it likely that Thai businesses will make employment opportunities for Myanmar migrants more attractive than what are available at home so that Thailand remains their preferred destination? This would have cost implications and will surely have an impact on Thailand's price competitiveness in the world market.

We conducted this study to gather evidence on the potential changes in the migration patterns of Myanmar migrants in Thailand, and to identify the likely impact of these changes on Thai economy and society. To prepare for and respond to significant changes, accurate information and ample time to act are key. We hope that the findings of this study will enable a range of stakeholders to better forecast, prepare for, and manage economic and social changes through an improved understanding of the positive and negative aspects of migration trends as they develop.

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Executive Summary

Recent decades have seen Thailand evolve into a regional migration hub in South-East Asia. Thailand has enjoyed healthy economic growth supported by its export-oriented businesses. As a result, Thailand has been experiencing an excess demand for low-skilled workers. Over the years, this gap has gradually been filled by low-skilled migrant workers from neighbouring countries, enabling the labour-intensive sectors to maintain Thailand's economic growth. At present, Thailand plays host to around 3.5 million migrants, roughly 3 million of whom are working. The vast majority of migrant workers in the country consist of low-skilled workers from three neighbouring countries: Myanmar, Cambodia and the Lao People's Democratic Republic, with Myanmar nationals being the largest migrant worker population, numbering estimated 2.3 million. It is projected that Thailand, in the foreseeable future, will depend on migrant labour force to fill the widening gap between the increasing labour demand and decreasing labour supply, which can possiblyincrease to 5.36 million workers by 2025.

On the other hand, unprecedented political and economic changes in Myanmar in the past years hints at the possibilityofa drastic change in the mobility patterns of the Myanmar labour force in the coming decades. With the economic projection that Myanmar's GDP could triple by 2030, creating more than 10 million new non-agricultural jobs, Myanmar workers will have employment options within their own country. If Myanmar's economic development continues at the pace currently projected, Myanmar nationals' migration patterns will inevitably and significantly change.

This assessment was conducted under these economic and social contexts in Thailand and Myanmar. It aims to provide an evidence-based understanding of the evolving migration patterns of Myanmar migrants and the ways the changes will affect them, their employers and other stakeholders, and finally, the two countries involved. It is the first comprehensive assessment in Thailand to produce a broad understanding of the characteristics of Myanmar migrants inthe country,as well as of the whole cycle of migration and the conditions of migrant workers before their decision to migrate, during themigration and, in the case of return, after migration.

The main finding of this assessment supports the assumption of Myanmar migrants' high willingness to return; the majority of the surveyed migrants, regardless of gender, economic and social backgrounds prior to migration, ethnic group, place of origin, reasons for migrating, current job in Thailand or current incomelevel, were willing to eventually return to MyanmarThey consider their stay in Thailand as a temporary phase where they take advantage of available economic opportunities.. The profiles of migrants who are less likely to opt for return included those who have been staying in Thailand for a long time and those who possess legal options to remain in Thailand permanently.

Income levels and working conditions may influence the timing of the actual return. Compared with migrants in lower income groups, migrants who have satisfactory working conditions, including better incomes, are more likely to remain uncertain about return time frame and to have a longer-term plan about when they are actually going back. However, for the majority of them, the intention is not to opt for permanent residency in Thailand.

A finding that became clear from this assessment was that fully documented and decently paid migrants have higher levels of satisfaction working in Thailand and more positive attitudes towards return; however, their planned return time frames were longer. While a future constraint in the supply of migrant workers from Myanmar may prove to be a challenge for Thailand, the recommended strategy is to provide migrants with the opportunity for documentation and to have decent wages and working conditions to make their migration experiences more positive and increase their willingness to be employed in Thailand.

Taking into consideration the expected increases in the labour demand in both Thailand and Myanmar in the coming years, it is predicted that the job sectors to receive the greatest impact from their inability to fill their labour needs are those which currently pay migrants lower wages. Previously, Thai workers in these sectors were replaced by new immigrants. In the future, with an increase in the demand for labour in both countries, these sectors would encounter difficulties in finding workers at the level of income they presently offer. At this point in time, it is difficult to think of any other practical options for these employment sectors than raising the levels of income for migrants so that they can retain a sufficient migrant labour force necessary for operating their businesses. How soon these sectors will be forced to raise wages really depends on the increase in the demand for labour in other parts of Thailand and Myanmar, and how the market wage levels for migrants in Thailand will increase. These are all important factors to consider by individual business owners, industry associations and the Royal Thai Government in facing and managing the changes that are sure to come.

Chapter 1
Background and methodology

1.1 Why this study was conducted (background)

We conducted this study because we believe strongly in the following statements:

1. The migrant workforce plays a crucial role in the economy of Thailand, and migrant workers from Myanmar constitute the majority of this workforce;

2. As a result of unprecedented economic and political change in Myanmar, an evolution of the migration patterns of Myanmar migrants is to be expected;

3. Thailand's economy and society will be impacted by such changes, and it is for the benefit of Thailand to proactively understand, forecast and prepare for these changes.

Migrants are an integral part of Thailand's economy, and the majority are from Myanmar

Thailand's steady, export-oriented economic growth in the past few decades created a strong demand for lower-skilled and low-cost labour in a wide range of labour-intensive sectors. As employers were unable to fill these labour demands with Thai nationals, jobs were filled by migrant workers from three of Thailand's neighbouring countries, namely, Cambodia, Lao People's Democratic Republic and Myanmar. For migrant workers, employment in Thailand was an attractive option due to the higher wages than what they would have received in their own countries.

Presently, an estimated 3.5 million migrants in either regular or irregular status are in Thailand; roughly 3 million of these migrants are in the labour market.[1] According to the Thai Ministry of Labour's statistics on registered migrant workers, 76 per cent of the migrant workforce is from Myanmar.[2] Applying this percentage to the estimated number of registered and unregistered migrant workers, around 2.3 million Myanmar migrants may be working in Thailand today.

The total migrant workforce of 3 million constitutes approximately 7 per cent of the country's total working population. Most studies conclude that this migrant workforce accounts for only about 1 per cent of Thailand's gross domestic product (GDP).[3] However, this big picture does not reveal crucial differences in the levels of dependency on migrant workers among employment sectors. Fisheries, for example, are one of the most migrant-dependent sectors in Thailand, where 75 per cent of the total labour force is composed of migrants. The fisheries sector would be unable to maintain its current level of production without migrant workers.[4] The chairman of the Fishery Association of Samut Sakhon was quoted as saying, "If Myanmar workers are gone, Mahachai's industry will be over."[5] Additionally, any disruption in the fisheries sector will have a number of implications for other industrial sectors, such as seafood processing, storage, transportation and trade. Furthermore, reduced production would impact the communities and businesses where these industries and workers are based, as well as domestic and international consumers of Thai seafood products. Similarly, 80 per cent of the workforce in the construction sector are said to be migrant workers[6] and the changes in their migration patterns could directly affect housing costs, which would subsequently affect other costs. As such, the economic and social implications of changing migration patterns go well beyond GDP.

In a report released last September 2012, the Office of the National Economic and Social Development Board said the labour shortage is expected to worsen in the near future.[7] In 2015, when the Association of Southeast Asian Nations starts economic integration, there will be 39.36 million Thai workers against the 43.26 million required, resulting in a deficit of 3.9 million, the report adds. Ten years later, the gap is expected to grow to 5.36 million because Thais will account for only 41.16 million of the 46.52 million

workers required. These gaps will need to be filled by migrant workers or they will affect the planned economic development targets.

Myanmar is changing and so will the migration patterns of Myanmar nationals

Myanmar is historically the largest exporter of rice and during the immediate post-World War II period was the leader in infrastructure and economic prospects among all south-east Asian countries; however, it has suffered from decades of military dictatorship, economic mismanagement and the longest civil war in the world in the past 60 years. Today, Myanmar is one of the world's least developed countries and has the lowest GDP per capita in ASEAN. Myanmar's population is largely rural, with 70 per cent of the workforce engaged in agriculture.[8] However, with a large and diverse landscape, rich natural resources, strategic location and diligent population, Myanmar is often referred to as "the jewel of South-East Asia".

The country has been undergoing a historic multifacexted transformation over the past three years. Some of the major changes on the political front include the reinstallation of the legislative system, official recognition and parliamentary participation of the National League for Democracy – the opposition party led by Aung San Suu Kyi – the release of political prisoners, ceasefire and peace negotiations with ethnic minority groups, and the end of media censorship and restrictions on the Internet. Since the peaceful transition from military rule to civilian government led by the President Thein Sein in 2011, a number of Heads of State have visited Myanmar, including the Presidents of the United States of America, the European Union (EU) and its member countries, Thailand, Japan and India, as have the Secretary General of the United Nations and heads of other international organizations.

These countries and organizations brought large volumes of financial and technical assistance to Myanmar to support the country's reform process. In 2013, the aid packages have grown even further, with the EU allocating USD 200 million for democratic reform and inclusive development[9] and the United States providing USD 170 million for priority areas, including democratic development, the peace process, health, economic development and food security.[10] The country was also granted major loans for social and economic development by both the World Bank, totalling USD 440 million, and from the Asian Development Bank totalling USD 512 million.[11] In addition, Japan announced its USD 1.76 million debt write-off, as well as USD 395 million in new development aid.

Most of the economic sanctions imposed on Myanmar by the aforementioned countries have been lifted by now, enabling foreign direct investment (FDI) from these countries to flow into Myanmar. The Myanmar Government has also taken measures to facilitate the influx of FDI, including the currency exchange system reform, and the introduction of the new foreign investment law, which includes a five-year tax holiday for certain types of investment. According to the Ministry of National Planning and Economic Development, the country has already approved FDI projects worth more than USD 2.1 billion between January and September 2013,[12] while the McKinsey Global Institute has identified the potential for Myanmar to attract USD 100 billion in FDI by 2030.[13] In addition, Myanmar could "seize the moment" by participating in the establishment of the ASEAN Economic Community by 2015.[14]

Despite facing a number of challenges, the outlook for Myanmar's economic development is quite positive for all the reasons explained above. The International Monetary Fund and McKinsey have estimated that Myanmar's GDP could grow at around 8 per cent per annum, quadrupling the economy to over USD 200 billion, and that the per capita GDP at purchasing power parity will grow from the current level of USD 1,400 to USD 4,400 by 2030 if investments are directed properly. They also forecast that more than 10 million non-agricultural jobs will have been created by then, with 6 million of those in manufacturing.[15] These forecasts suggest that in the future, Myanmar workers will have growing options to seek employment

within their own country. There are a number of countries were able to transform from net labour-sending to net labour-receiving countries through economic development, including Thailand and the Republic of Korea. If Myanmar's economic development continues at the pace currently projected, Myanmar nationals' migration patterns will inevitably and significantly change.

1.2 What this study wanted to find out (objectives)

Taking into account the growing possibility of migrants returning to Myanmar in large numbers in the coming years, we thought that it was important to conduct an evidence-based assessment and analysis of the potential changes in the migration patterns of Myanmar migrants in Thailand before large-scale return starts to take place. As much as we wanted to understand the scenario at the macro-level, we also wanted to understand better how the timing of and the reasons for the return may vary among the migrant population, which could affect different parts of the employment sectors of Thailand in different ways.

The main questions regarding which we wanted to obtain representational understanding were the following:

(a)   Are the migrants really planning to return to Myanmar for good?

(b)   To what extent have their decisions been influenced by the series of political and economic changes in Myanmar?

(c)   What are the tipping points at which various migrant groups will start to return to Myanmar in large numbers?

(d)   Which geographical locations and industries will be most affected by changes in migration patterns, in terms of the speed and the scale of such impacts?

(e)   How can the Thai Government, businesses and society better prepare for mass returns?

In order to understand the issues listed above, we asked for a variety of information so that the specific tendencies of migrants, which were attributable to certain characteristics, could be understood. Some of the information we asked for included:

(a)   Demographic characteristics;

(b)   Which parts of Myanmar they came from;

(c)   Their main reasons for migration to Thailand;

(d)   How they entered Thailand and their current legal status in Thailand;

(e)   The number of years they have been staying in Thailand ;

(f)   Their living and working conditions (disaggregated by geographical area and employment sector in Thailand);

(g)   The skills they gained while living and working in Thailand;

(h)   Reasons for wanting or not wanting to go back to Myanmar;

(i)   Which part of Myanmar they wanted to go back to;

(j)   What kinds of jobs they wanted to take up upon return;

1.3 How the study was carried out (methodology)
1.3.1 Data collection and analysis

This study involved both quantitative and qualitative surveys of Myanmar migrants and the local population in seven border and non-border provinces of Thailand that host large numbers of migrants. The assessment framework, methodology and questionnaires were jointly developed by ARCM and IOM, pre-tested prior to the implementation of the surveys, and translated into Burmese and Thai. The quantitative and qualitative data were collected by staff members of six partner non-governmental organizations (NGOs) who have the capability to reach the migrant communities in the target provinces.[16] ARCM provided survey training to the data collection staff; as well as on-site monitoring and quality control. Completed questionnaires were sent back to ARCM, where the data entry was done. The data were analysed using the SPSS programme, with cross-tabulation of the variables.

1.3.2 Population and sample size

While data regarding documented migrant workers are collected and managed by the Thai Government, accurate data on the geographic distribution and number of undocumented migrants in Thailand do not exist. The target provinces (see Map 1) were identified based on the number of migrants registered with the Ministry of Interior in 2004, when the incentives for documentation were believed to be more consistent across Thailand than they are today. In total, 56 per cent of all registered Myanmar migrants in Thailand were in these provinces. For the population size of over 100,000, the sampling size of 5,027 was determined based on the methodology of Yamane (1973:886), with a margin of error of 1 per cent.[17] The sample size of 5,027 was distributed among the target provinces through representational sampling, based on a ratio calculated from the 2010 – 2011 migrant workers' registration by the Ministry of Labour. The sampled population in each province was further divided among the major employment sectors, based on statistics from the respective provincial employment offices. To understand gender-based differences, the sampling attempted to have a similar number of males and females in each of the target provinces.

The number of respondents in each target province and the top three employment sectors are shown in Table 1.

Map 1: Target provinces and sample size per province
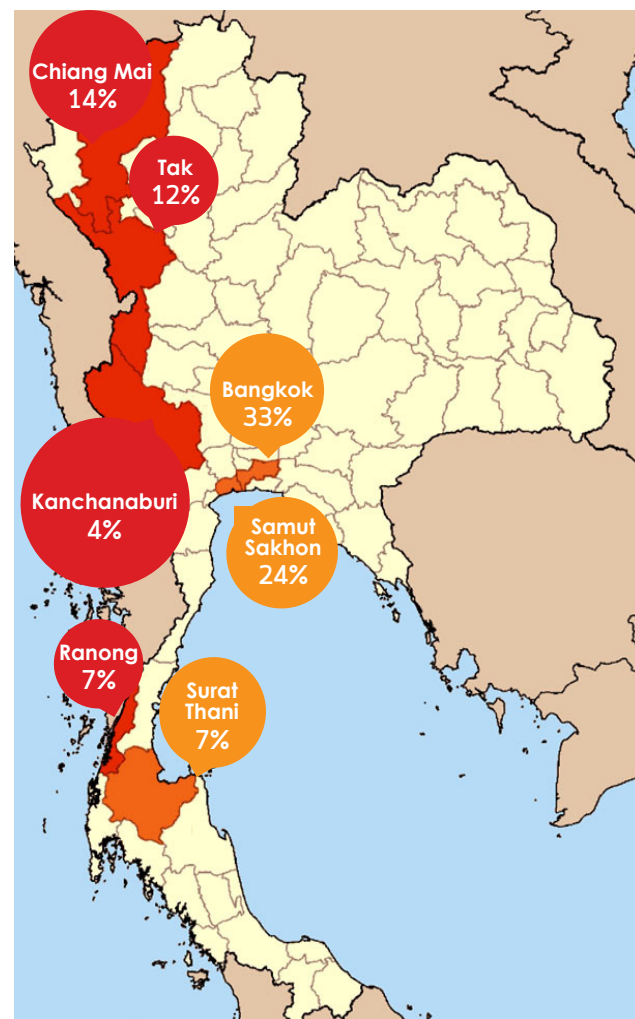
Table 1: Breakdown of the surveyed migrants in target provinces

Province	Number of respondents	Percentage of the total sample	Top three employment sectors of the surveyed migrants (% within each province)
1. Bangkok	1,635	33%	1. Garment production and sales (23.0%) 2. Other manufacturing (20.6%) 3. Domestic work (17.0%)
2. Samut Sakhon	1,192	24%	1. Fishery related (29.3%) 2. Other manufacturing (15.5%) 3. Fishery (15.2%)
3. Chiang Mai	710	14%	1. Construction (52.2%) 2. Other services (11.1%) 3. Food & beverages sales (10.0%)
4. Tak	580	12%	1. Agriculture and animal husbandry (30.5%) 2. Construction (22.2%) 3. Other services (10.3%)
5. Ranong	372	7%	1. Fishery related (28.5%) 2. Construction (18.8%) 3. Fishery (16.7%)
6. Surat Thani	350	7%	1. Agriculture and animal husbandry (32.3%) 2. Agriculture and animal husbandry related (26.6%) 3. Food and beverage sales (6.3%)
7. Kanchanaburi	180	4%	1. Other labour work (43.9%) 2. Agriculture and animal husbandry (32.2%) 3. Construction (6.7%)
Total	5,027	100%	

1.3.3 Limitations of the study

This study revealed that the ratio of documented and undocumented migrants differed greatly from one province to another. As the representational sampling relied on the official government statistics on documented migrants, the sampling was skewed towards provinces where there were higher percentages of documented migrants. Furthermore, gaining access to and obtaining the consent of undocumented migrants was generally more difficult than doing the same with documented migrants; as a result, the voices of undocumented migrants are less represented in this assessment.

Though sampling in each province was based on the Relative sizes of employment sectors as indicated in Ministry of Labour statistics, it was not possible to strictly implement the desired sample distribution due to accessibility issues and the challenge of maintaining a balanced gender ratio when assessing gendered employment sectors.

Another study limitation arose from the fact that, owing to the large sample size and the number of target provinces, separate survey teams had to be formed in each target province. As a result, the data collection processes were not as consistent, which is ideal, as if one survey team had conducted the survey in all provinces. The project team tried to overcome this limitation by gathering all interviewers in Bangkok for survey training, and by making field visits and conducting quality control.

Footnotes

[1] J.H. Huguet and A. Chamratrithirong (eds.), *Thailand Migration Report 2011*, (Bangkok, IOM, 2011).

[2] Thai Department of Employment, Ministry of Labour IOM Migrant Information Note (MIN), Issue #21 (September 2013)

[3] Huguet, J.W. and A. Chamratrithirong, 2011.

[4] B. Chokesanguan, "Impact of fisheries management in improving safety at sea measures: A case study in Thailand," paper presented at the ASEAN–SEAFDEC Conference on Sustainable Fisheries for Food Security Towards 2020, Bangkok 2011.

[5] The Asahi Shimbun, "Thailand faces labor shortage as neighboring economies grow," 29 August 2013. Available from   http://ajw.asahi.com/article/asia/south_east_asia/AJ201308290007.

[6] Ibid.

[7] Thai National Economic and Social Development Board, "Labour Factor Risk: Impacts from ASEAN Economic Community," research presentation, Bangkok, September 2012.

[8] Central Intelligence Agency, *The CIA World Factbook 2012* (Washington, D.C., 2011).

[9] European Commission, "Development and Cooperation - EuropeAid: Myanmar/Burma," webpage. Available from http://ec.europa.eu/europeaid/where/asia/country-cooperation/myanmar/myanmar_en.htm.

[10] U.S. Department of State, "U.S. Relations with Burma," webpage. Available from www.state.gov/r/pa/ei/bgn/35910.htm.

[11] BBC News, "Burma gets Asian Development Bank and World Bank loans," 28 January 2013. Available from www.bbc.co.uk/news/business-21226344.

[12] Myanmar Ministry of National Planning and Economic Development, "Foreign Investment of Permitted Enterprises by Sector," data table. Available from www.mnped.gov.mm/html_file/foreign_trade/s30MA0201.htm.

[13] McKinsey Global Institute, "Myanmar's moment: Unique opportunities, major challenges," June 2013. Available from http://www.mckinsey.com/insights/asia-pacific/myanmars_moment.

[14] S. Umezaki, "Building the ASEAN Economic Community: Challenges and opportunities for Myanmar. "In *Economic Reforms in Myanmar: Pathways and Prospects* (Hank Lim and Yasuhiro Yamada, eds.), BRC Research Report No. 10, (Bangkok Research Center and IDE-JETRO, 2012.)

[15] McKinsey Global Institute, 2013.

[16] These include the American Refugee Committee, Foundation for Rural Youth, Human Rights and Development Foundation, National Catholic Commission on Migration, Thai Allied Committee with Desegregated Burma Foundation, World Vision Foundation and students of M.A. International Development Studies, Chulalongkorn University. Please see the Acknowledgements section accompanying the geographical coverage of each survey partner.

[17] T. Yamane, *Statistics: An introductory Analysis*, 6th printing (New York, Harper and Row, 1973).

Chapter 2
Characteristics of the surveyed migrants

2.1 Demographics and backgrounds of the surveyed migrants

This section first presents the major findings concerning the characteristics of the surveyed migrants, in order to allow an understanding of the migrants' return prospects in the broader context of the factors affecting their decision to migrate, stay or return.

Main findings

▶ There were more female than male migrants in the young age category of 15-24 years.

▶ Some 76.5 per cent of migrants came from the states and regions of Myanmar bordering Thailand.

▶ The largest ethnic group was the Bamar (43.5%), followed by the Shan (18.3%), the Mon (15.1%), the Kayin (12.5%) and others (10.6%).

▶ Prior to migrating to Thailand; 40.2 per cent were self-employed, 38.8 per centwere wage labourers in various employment sectors and 21.0 per centwere unemployed.

▶ Some 59.8 per cent of respondents said their living conditions in Myanmar were adequate, while 23.9 per cent reported austere living conditions prior to migrating.

▶ More than half of the migrants were married, and over 90 per cent of those were living with spouses in Thailand. Among married migrants, 68.6 per cent had children. Migrants living in non-border provinces of Thailand were more likely to leave their children behind in Myanmar than the migrants in border provinces.

▶ Female migrants were more represented than malesatthe lower educational levels (no education and primary education), as well as the higher educational levels (university and vocational training).

2.1.1 Age groups

Among the 5,027 migrants surveyed, just under half (48.2%) were female and 51.6 per cent were male (0.2% no answer). Nearly all of the migrants (98.0%) were in the 18–60-year old age group. Figure 1 shows that in the youngest age group, 15–24 years, there were more female than male migrants.

Figure 1: Age categories of surveyed migrants by gender
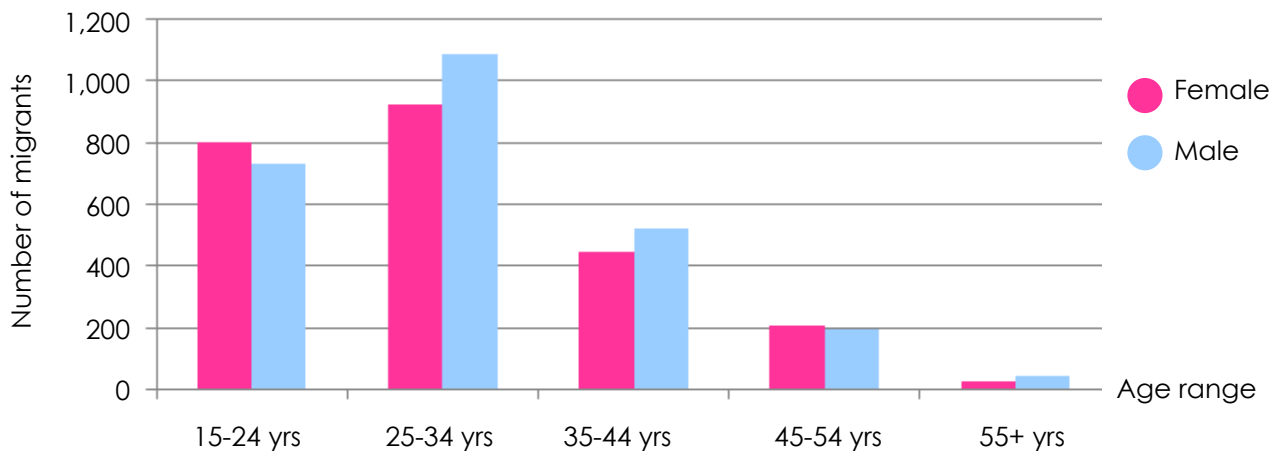
2.1.2 Ethnicities and places of origin

As Map 1 shows, surveyed migrants came from all states and regions of Myanmar. However, the majority (76.4%) of them came from one of five states and regions bordering Thailand – namely, Mon State, Shan State, Thanintharyi Region, Kayin State and Kayah State. Some 20.2 per cent came from other regions, and 2.5 per cent from other states that do not share a border with Thailand (0.9% no answer).[1]

The Bamar were the largest ethnic group among the surveyed migrants, representing 43.5 per cent of the total number, followed by the Shan (18.3%), the Mon (15.1%), the Kayin (12.5%) and other groups (10.6%), which include theKayar, the Rakhine, the Kachin, and the Chin. Figure 2 shows the ethnic composition of the surveyed migrants by state/ region of origin.

Map 1: Surveyed migrants' region and states of origin in Myanmar
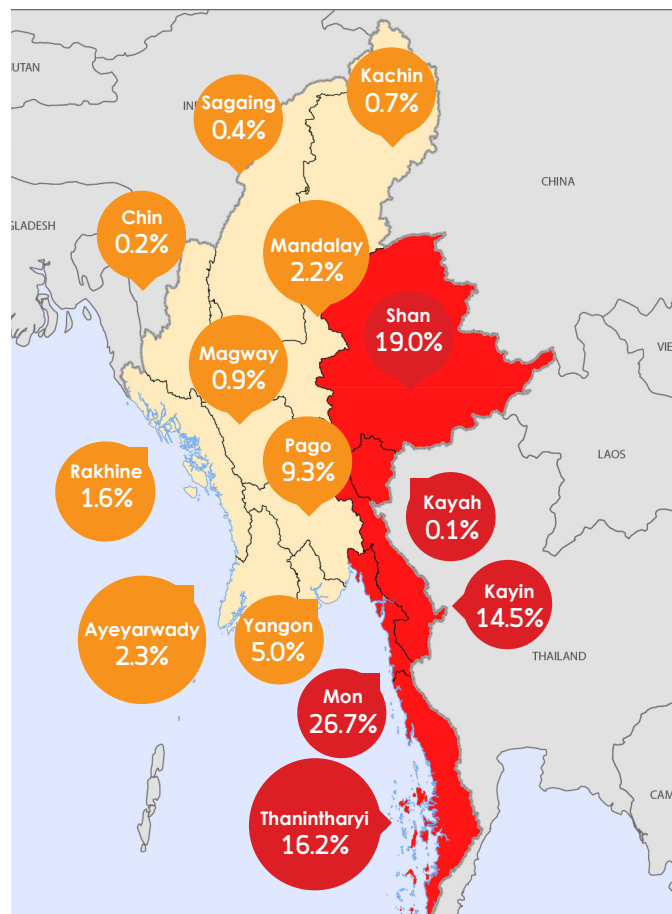
Figure 2: Ethnicities of the surveyed migrants by state/region of origin in Myanmar
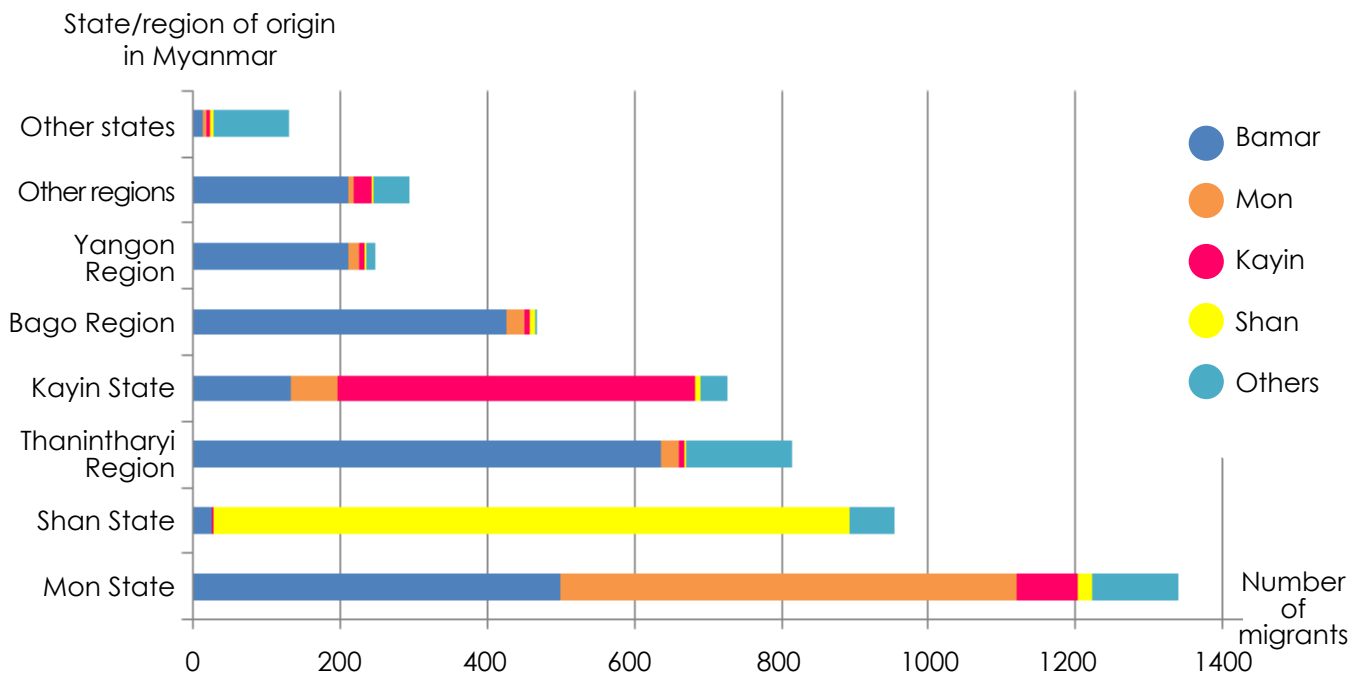
2.1.3 Living conditions before migrating to Thailand

Prior to migrating to Thailand, one fifth (21.0%) of the sample were unemployed, while 38.8 per cent were wage labourers in sectors such as agriculture (10.9%), services (6.7 %), educational and social work (3.5%) and others (6.2%). The remaining 40.2 per cent of the sample were self-employed, including 32.4 per cent who had their own farms and 7.8 per cent who were merchants.

One third (35.7%) came from urban areas, while 64.3 per cent came from rural areas. Among the respondents, 59.8 per cent said their living conditions in Myanmar were "adequate", while 15.7 per cent said their conditions were "good" or "quite good" and 23.9 per cent reported their conditions to be "bad" or "very bad". No significant differences in living conditions were reported between genders or among states/regions of origin; however, migrants who belonged to the Kayar, the Kachin, the Chin and the Muslim ethnic groups reported more difficult living conditions prior to migration than other ethnic groups.

2.1.4 Family statuses

Of the surveyed migrants, 38 per cent were single; 57.6 per cent were married;, and 4.4 per cent were divorced or widowed. Among married migrants, 90.2 per cent were living with their spouses in Thailand, and 68.6 per cent had at least one child under the age of 15 years. Among migrants with children, 56.8 per cent said that all of their children were in Thailand; 30.9 per cent said all of their children were all in Myanmar; and 10.6 per cent reported that some children were in Thailand and some were in Myanmar.

Figure 3 shows that in non-border provinces, migrants with children were more likely to leave them behind in Myanmar (Samut Sakhon, 51.5%; Surat Thani, 47.6%; and Bangkok, 44.4 %), whereas those in border provinces were less likely to do so (Ranong, 23.8 %;Tak, 9.7 %; Chiang Mai, 7.9%; and Kanchanaburi 3.2%).

Figure 3: Locations of surveyed migrants' children under 15 years of age, by surveyed migrants' current province of residence in Thailand
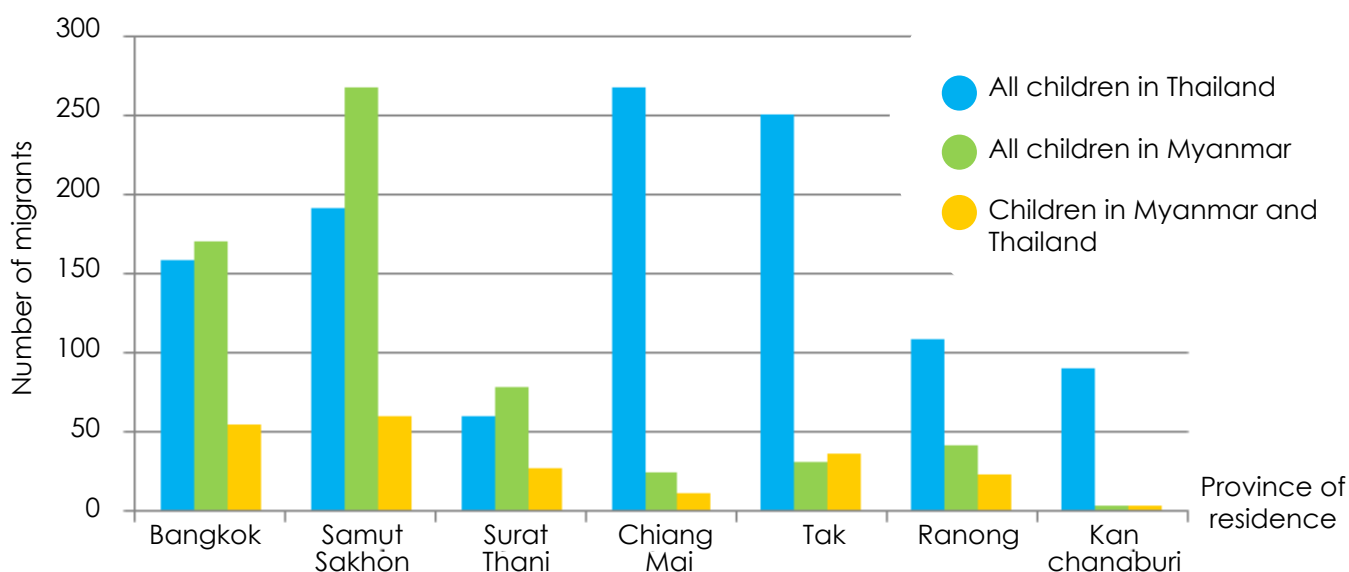
There were more female than male respondents at the lower levels of educational attainment (no education and primary education), as well as at the higher ones (university and vocational education). There were thrice as many male as female migrants who had received informal education, from places such as monasteries (Figure 4).

Figure 4: Levels of educational attainment of surveyed migrants by gender
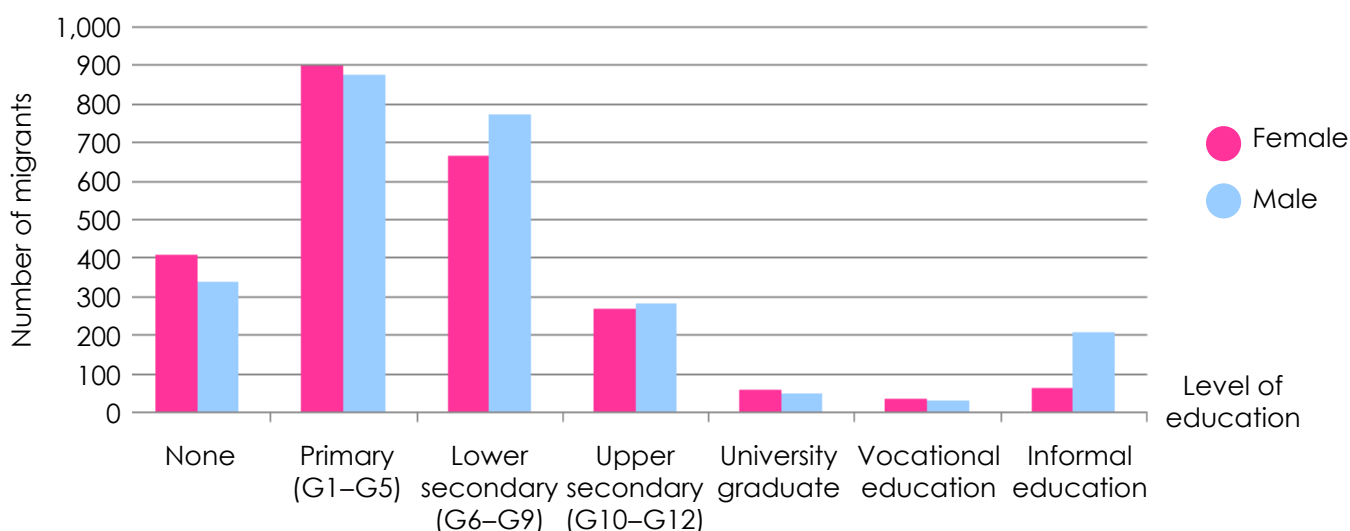
2.2 Migration history of the surveyed migrants

Main findings

▶ The primary reasons for migrating to Thailand included economic (74.9%), personal (13.4%) and security/safety-related (7.0%). The percentage of migrants citing security/safety reasons was particularly high among the Shan ethnic group (22.5%).

▶ Some 43.3 per cent of respondents migrated to Thailand with the help of family and friends, while 37.7 per cent were assisted by brokers, and 18.5 per cent went on their own. Other than those from Shan State, migrants from border states/regions of Myanmar were more likely to use brokers than those from non-border states/regions.

▶ Migrants currently living in non-border provinces in Thailand were more likely to have come to Thailand through brokers than migrants living in border provinces.

▶ The majority of the migrants were fully documented (64.6%), followed by temporarily documented (18.3%) and undocumented (12.7%), while another (4.4%) had coloured cards issued by the Thai Government (0.2% provided no answer).[3] The proportion of documented migrants was particularly low in Tak and Kanchanaburi Provinces.

▶ The number of documented migrants was lower in some employment sectors, for example, agriculture and animal husbandry, other labour work, fisheries and construction.

▶ A majority of the migrants had been living in Thailand for less than 10 years (73.2%).

2.2.1 Primary reasons for migrating to Thailand

Around 74.9 per cent of surveyed migrants cited economic reasons, such as, earning a higher income or better employment opportunities, as the primary reason for migrating to Thailand. Another 13.4 per cent had personal reasons, such as the desire to "follow" family and friends, persuasionby family/friends to migrate, or the desire for personal experience and exposure; 7.0 per cent cited security/safety issues; and 4.6 per cent cited better living conditions and services as the primary reason for coming to Thailand. Disaggregating the data by ethnic group, the Shan (22.6%) had the highest percentage of those citing security/safety issues as the primary reason for migrating, followed by the Kayin (7.2 %) (Figure 5).

Figure 5: Primary reason for migrating to Thailand, by ethnic group
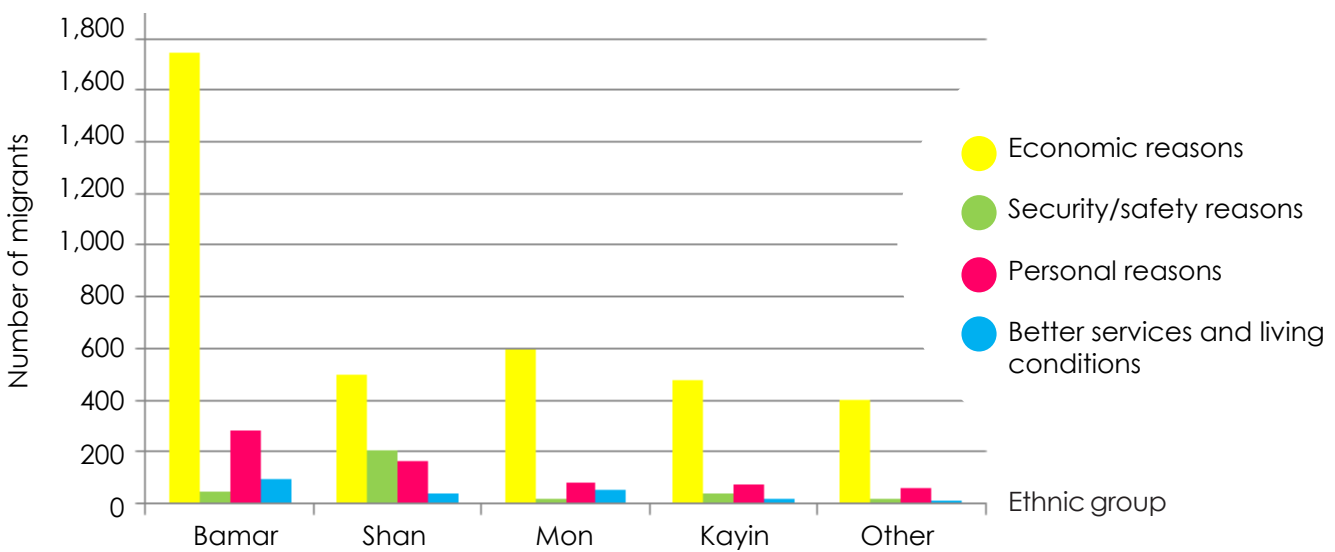
2.2.2 Who assisted the migrants in their move to Thailand

Overall, 43.3 per cent of migrants came to Thailand through arrangements made by family and friends, 37.7 Some 43.3 per cent of the migrants came to Thailand through arrangements made by family and friends, 37.7 per cent through brokers and 18.5 per cent on their own. Only 0.5 per cent of the respondents came to Thailand through the formal recruitment process stipulated in a Memorandum of Understanding (MOU) between Myanmar and Thailand on cooperation in the employment of migrant workers.

Among states/regions of origin, Shan Statehad the highest percentage of migrants (86.3%) who migrated to Thailand either with the help of family and friends or by themselves. Interestingly, higher percentages of migrants from other border states and regions of Myanmar came to Thailand with the help of brokers than of the migrants from non-border regions and who lived further away from Thailand; nevertheless, the percentage of migrants depending on brokers was also high in non-border states (Figure 6).

Figure 6: Assistance received in migrating to Thailand, by migrants' state/region of origin in Myanmar
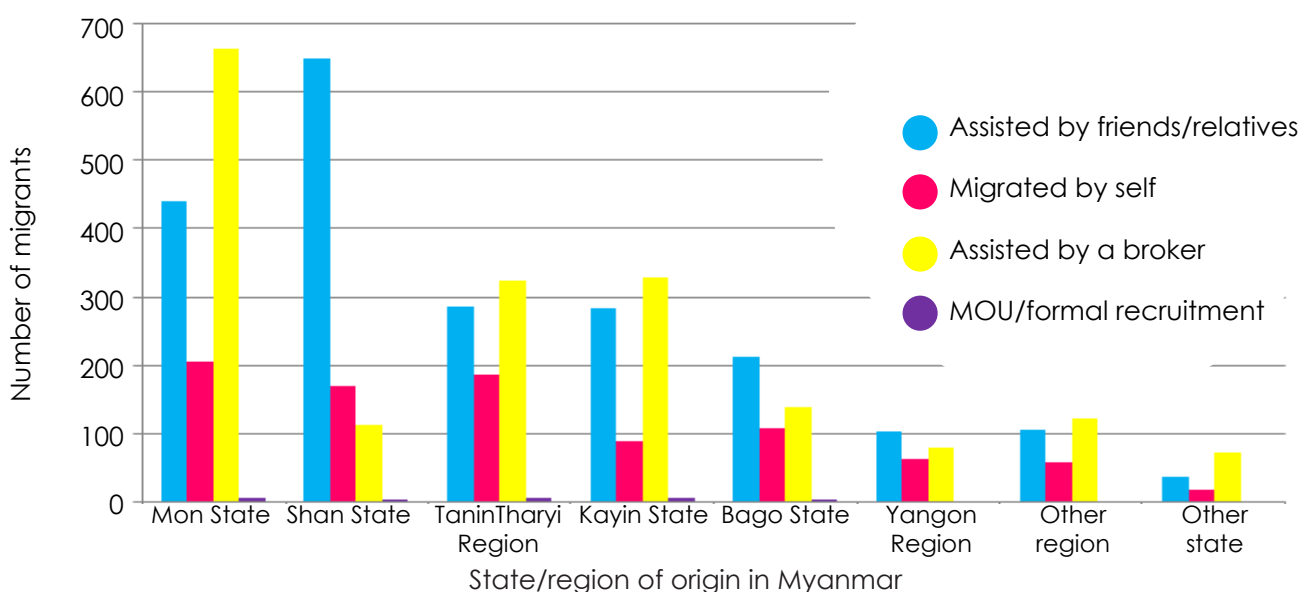
Among the provinces of current residence in Thailand, the non-border provinces of Samut Sakhon (77.5%), Bangkok (47.4%) and Surat Thani (33.8%) have much higher percentages of respondents who migrated to Thailand with brokers than the border provinces. In the latter, the percentages of migrants who came to Thailand throughbrokers were only between 3.3 and 5.4 per cent.

Figure 7: Assistance received in migrating to Thailand, by migrants' province of current residence in Thailand
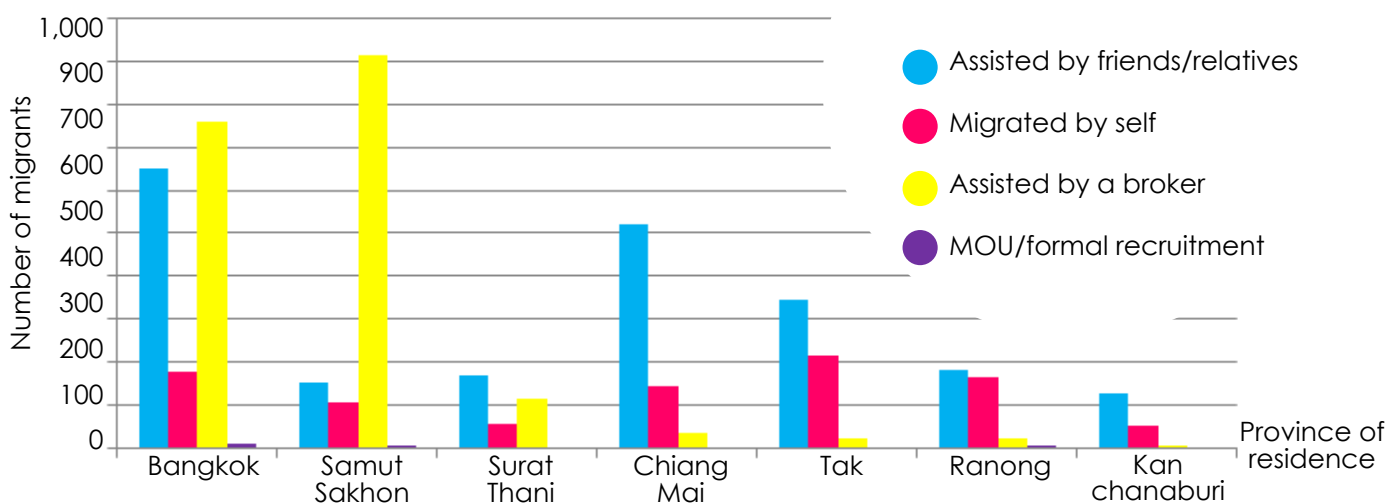
2.2.3 Documentation statuses

Around 64.6 per cent of all the migrants in the sample indicated having full documentation; 18.3 per cent reported having temporary documentation; 12.7 per cent were undocumented; 4.4 per cent had coloured cards[2]; and 0.2 per cent did not respond. Migrants with full documentation were the largest group in many provinces, for example, totalling between 67.8 per cent in Samut Sakhon and 88.5 per cent in Chiang Mai (Figure 8). However, in Tak Province, the majority of respondents were without any documents (63.1%) and in Kanchanaburi coloured cardholders were the largest group (56.1%).

Figure 8: Documentation statuses of the surveyed migrants, by province of current residence in Thailand
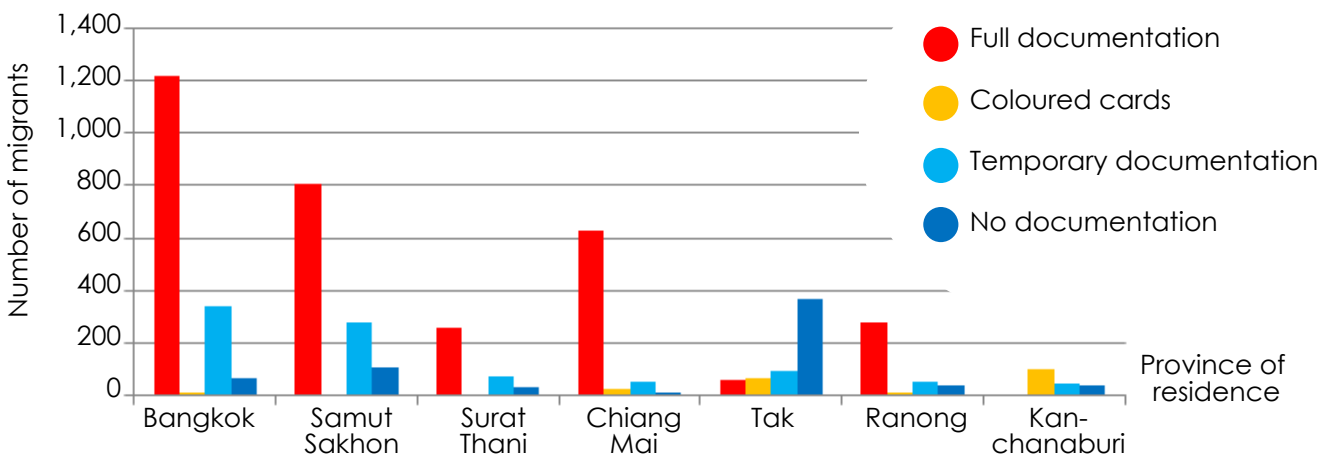
Analysing data by employment sector, agriculture, other labour work, fisheries and construction are found to have lower percentages of documented migrants (Figure 9). On the other hand, higher percentages of documented migrants are in employment sectors where the workers are concentrated in fixed locations such as factories (fishery-related, industrial production and sales, and other manufacturing).

Figure 9: Documentation statuses of the surveyed migrants in percentages, by employment sector
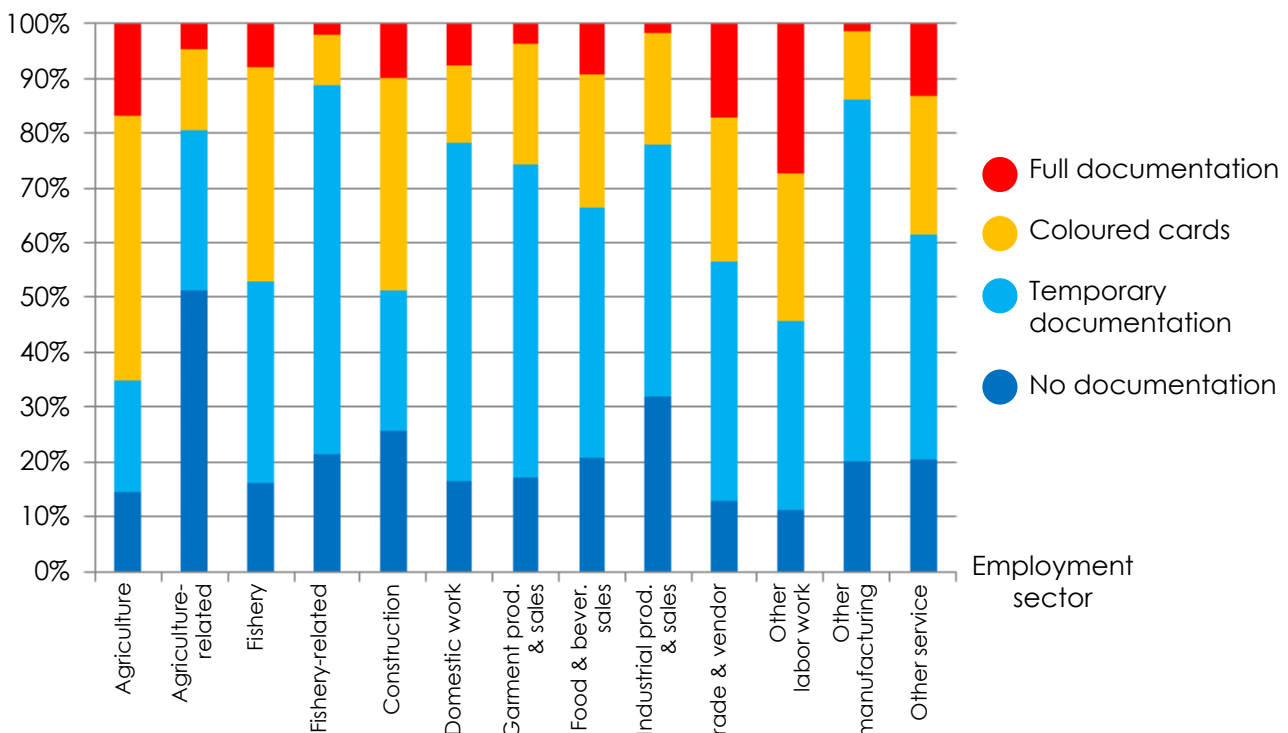
2.2.4 Lengths of stay in Thailand

Concerning duration of stay in Thailand, 41.3 per cent of respondents indicated that they have been in Thailand for 0–4 years and 31.9 per cent for 5–9 years. The number of migrants staying in Thailand decreases as the period of stay increases.

Figure 10: Surveyed migrants' lenghts of stay in Thailand
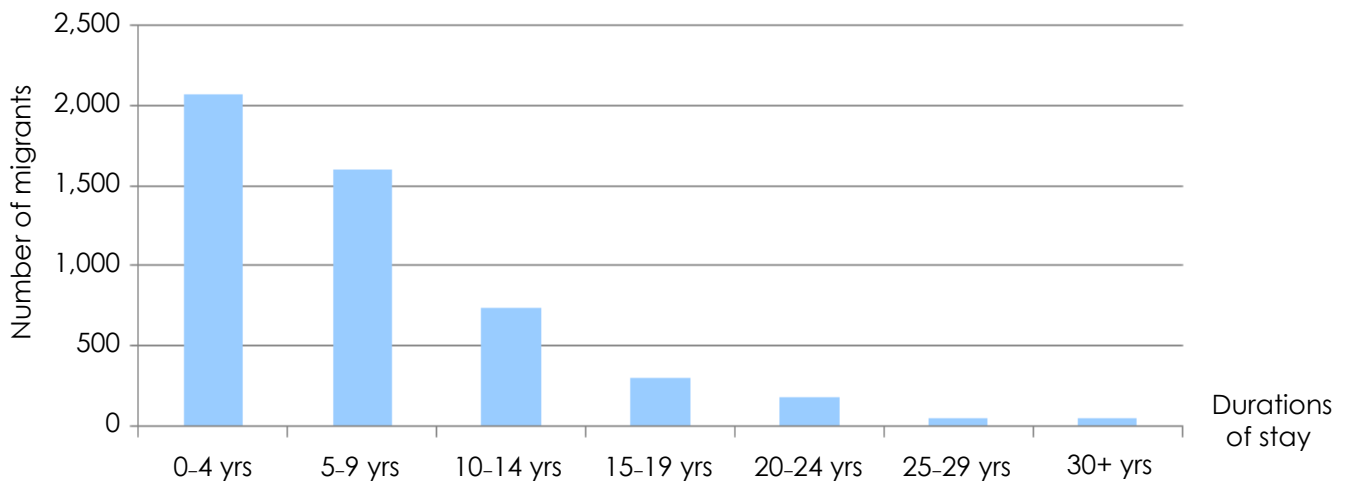
2.3 Employment conditions in Thailand

Main findings

▶ Female migrants reported lower levels of income than male migrants. Among the lowest income group, there were nearly twice as many females as males.

▶ There were clear differences in the incomelevel and working conditions between border provinces and non-border provinces. In Tak, 91.5 per cent reported receiving less than the minimum wage. Among them,47.7 per cent received less than half of the minimum wage.

▶ In some provinces there were wage variations among employment sectors. Such variations are unique to each province and generalization was not possible.

▶ Undocumented migrants reported lower levels of income and worse working conditionsthan documented migrants.

▶ Some 59.8% of migrants rated their working conditions as average,35.8 per cent as either good or very good,4.3 per cent as either bad or very bad.

▶ Better Thai language skills and higher income had a positive effect on migrants' rating of their working conditions.

2.3.1 Levels of income

The migrants were split almost equally among those who received less than the minimum wage of THB 300 per day, those who received the minimum wage, and those who received more than the minimum wage. A little more than half of the surveyed migrants were daily income earners, and the rest were mostly monthly wage earners. Monthly wage earners had higher levels of income than the daily wage earners – whereas 38.2 per cent of daily wage earners earned less than the minimum wage, 25.2 per cent of monthly wage earners received less than the minimum wage.

There were more female than male migrants receiving less than the minimum wage, while a higher number of male migrants received the minimum wage or more (Figure 11).

Figure 11: Surveyed migrants' income levels in Thailand by gender
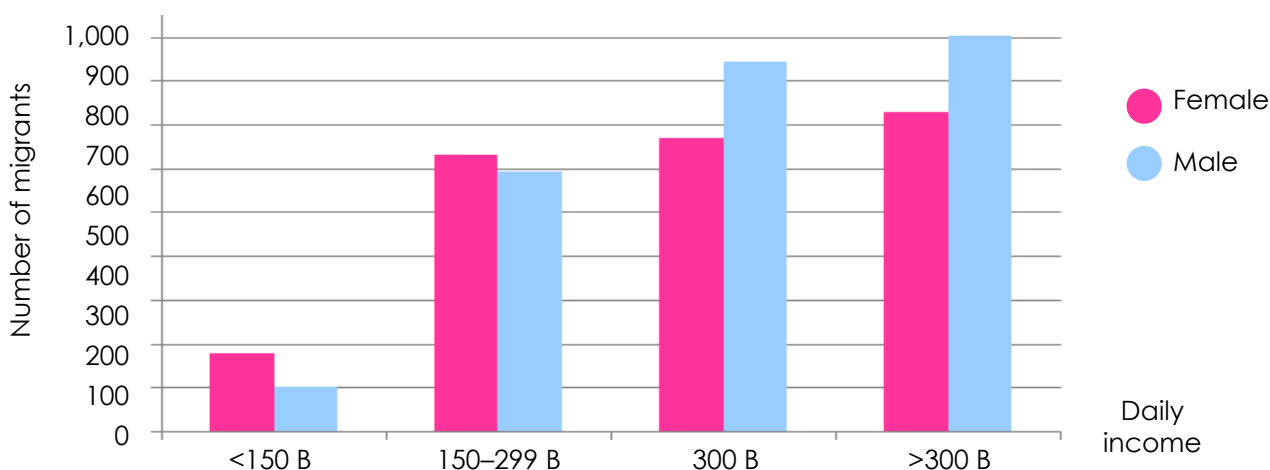
The income levels of surveyed migrants differed greatly by province of current residence. In three non-border provinces, Bangkok, Samut Sakhon and Surat Thani, 90.1, 84.3 and 93.1 per cent, respectively, of migrantsreceived at least the minimum wage. On the other hand, the level of income was generally lower in border provinces, especially in Tak, where 91.5 per cent of migrants received less than the minimum wage and half received less than half the minimum wage.

Looking at the main employment sectors of each province more closely, significant differences in the income level within the same employment sector across different provinces are observed. For instance, agriculture and animal husbandry was shown to be a highly underpaid employment sector in Tak, where 98.3 per cent of migrant workers in the sector were paid below the minimum wage and, among them, 73.8 per cent received less than half the minimum wage. In contrast, only 9.1 per cent of migrant workers in the same sector in Surat Thani received below the minimum wage, while 80.0 per cent of them received more than the minimum wage. The fishery sector was the lowest paid among the top three employment sectors in Samut Sakhon, but it was the best paid sector in Ranong. Figure 12 illustrates that income levels generally correspond more to geographical location than to the nature of employment.

Figure 12: Surveyed migrants' income levels in the three main employment sectors of each province
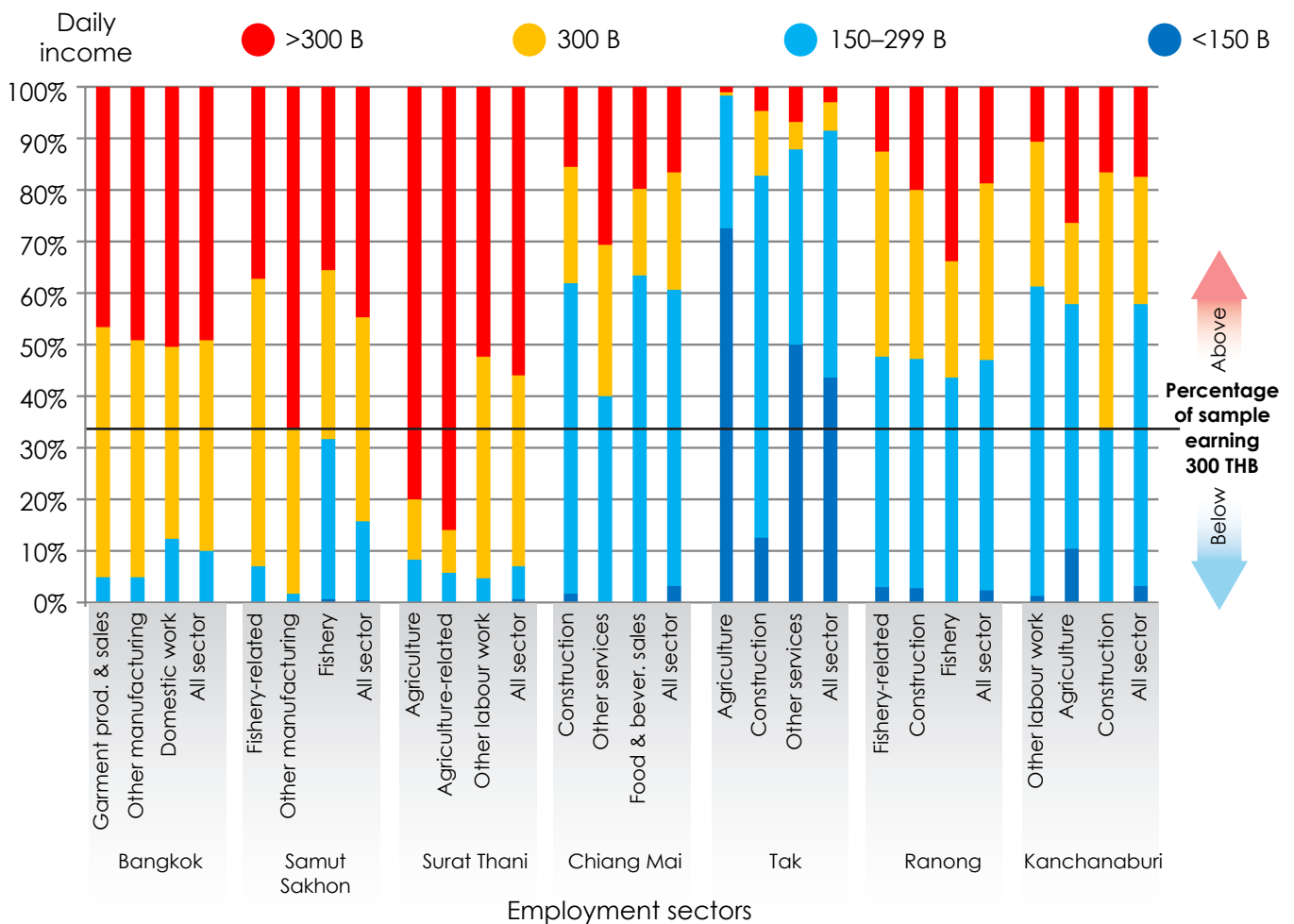
Figure 13 shows that, in general, migrants with full or temporary documentation earned higher incomes. Sixty-five per cent of migrants who earned less than half of the minimum wage were without documentation. Furthermore, migrants with coloured cards comprised higher percentages of those receiving lower salaries.

Figure 13: Surveyed migrants' income levels by documentation status
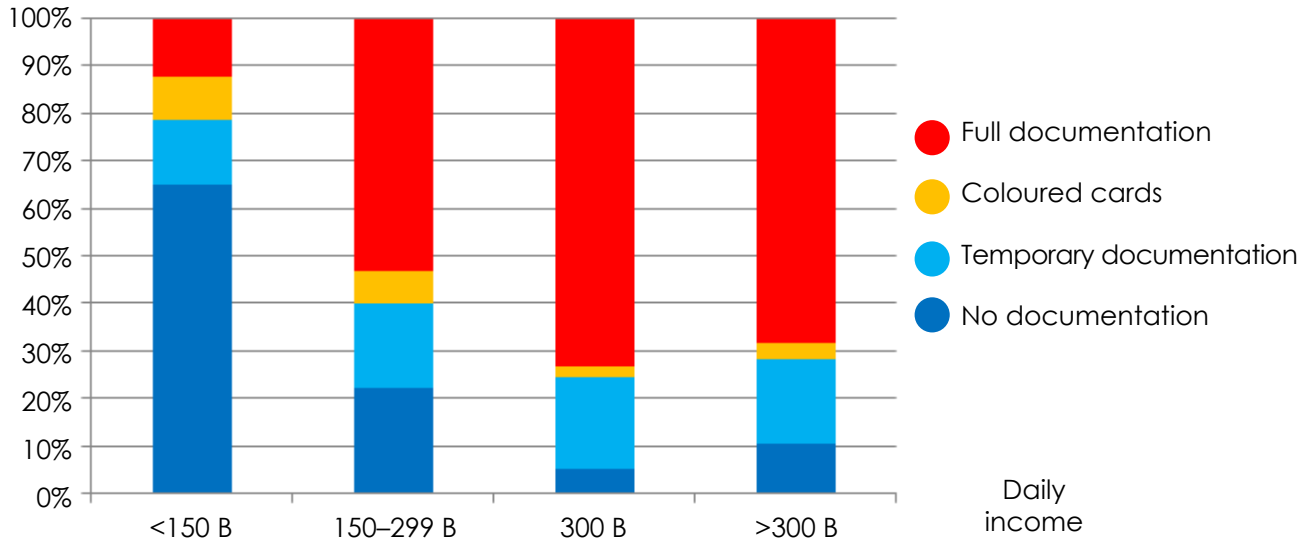
2.3.2 Work conditions

The clear majority of migrants rated their working conditions as "adequate" (59.8%) or "good" (32.8%), while only a small minority reported "very good" (3%), "bad" (4.1%) or "very bad" (0.2%) conditions. There was no significant difference in the level of work conditions between genders.

Thai language skills had a positive relation to the migrants' work conditions and their satisfaction with their income levels. Migrants who had a greater ability to speak and write Thai fluently comprised a higher percentage of those who reported having good or very good work conditions than of those who reported adequate or bad work conditions.

The majority of migrants in all provinces rated their working conditions as at least adequate (Figure 14). Migrants in Bangkok, Surat Thani and Kanchanaburi reported better work conditions compared with other provinces; in Chiang Mai, Tak and Ranong, on the other hand, fewer migrants had good or very good working conditions. The fishing and fisheries industries had more unsatisfied migrants across the various provinces, as did the construction sector in Chiang Mai and Ranong. In provinces where migrants reported lower levels of work conditions, migrants were also more likely to report that their salaries were insufficient to cover necessary expenses.

Figure 14: Work conditions among surveyed migrants in the three main employment sectors and overall, by province of current residence in Thailand
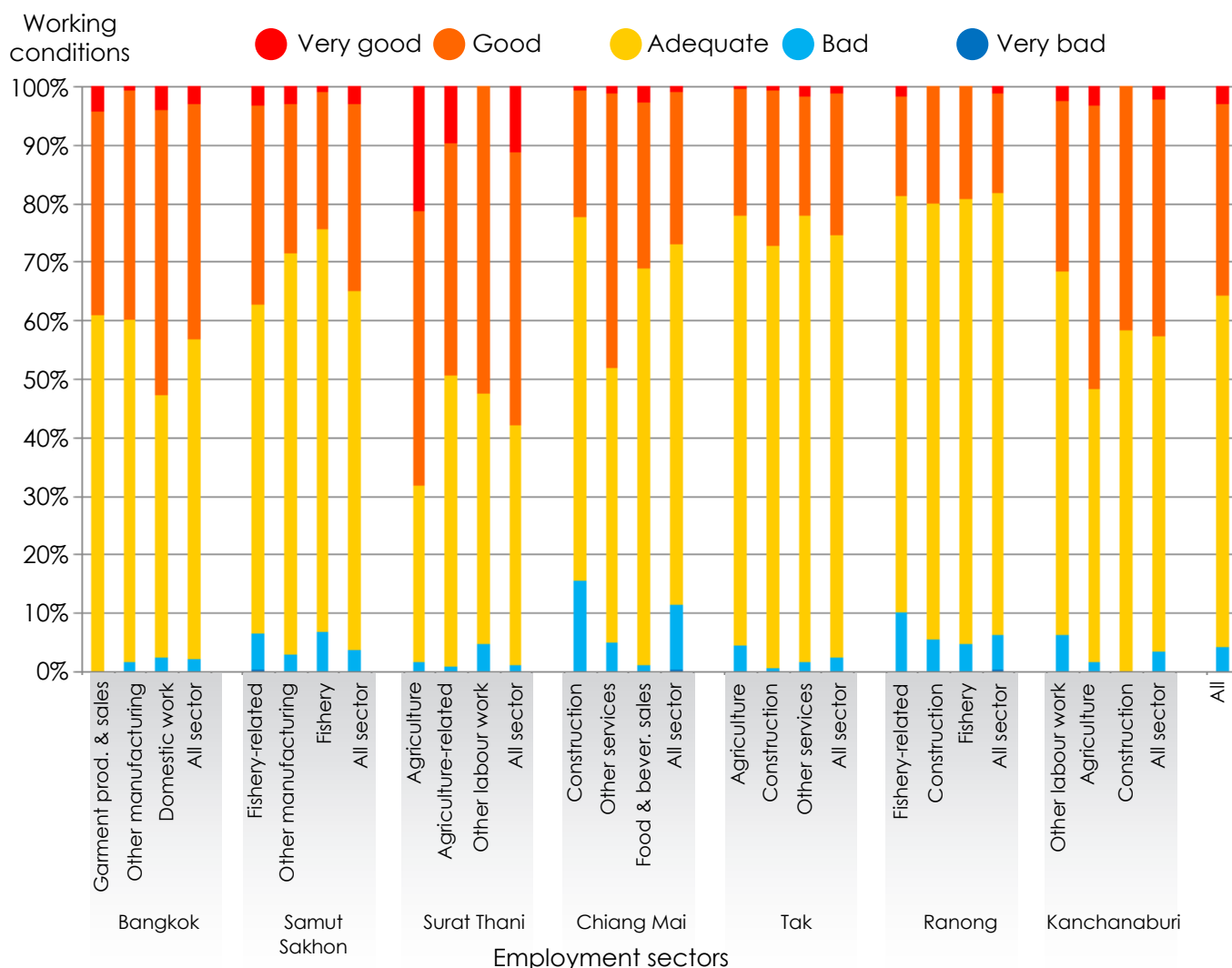
Although the majority of migrants across all income levels rated their working conditions as adequate, income level was a significant determinant of such rating (Figure 15). A larger percentage of migrants in the highest income level rated their working conditions as good or very good (44.8%) and, among those, over 60 per cent reported that their income level was sufficient for necessary expenses. Only one in four migrants earning less than the minimum wage gave a good or very good rating of their working conditions, and less than 30 per cent reported that their income was sufficient to cover necessary expenses.

Figure 15: Work conditions among surveyed migrants by level of income
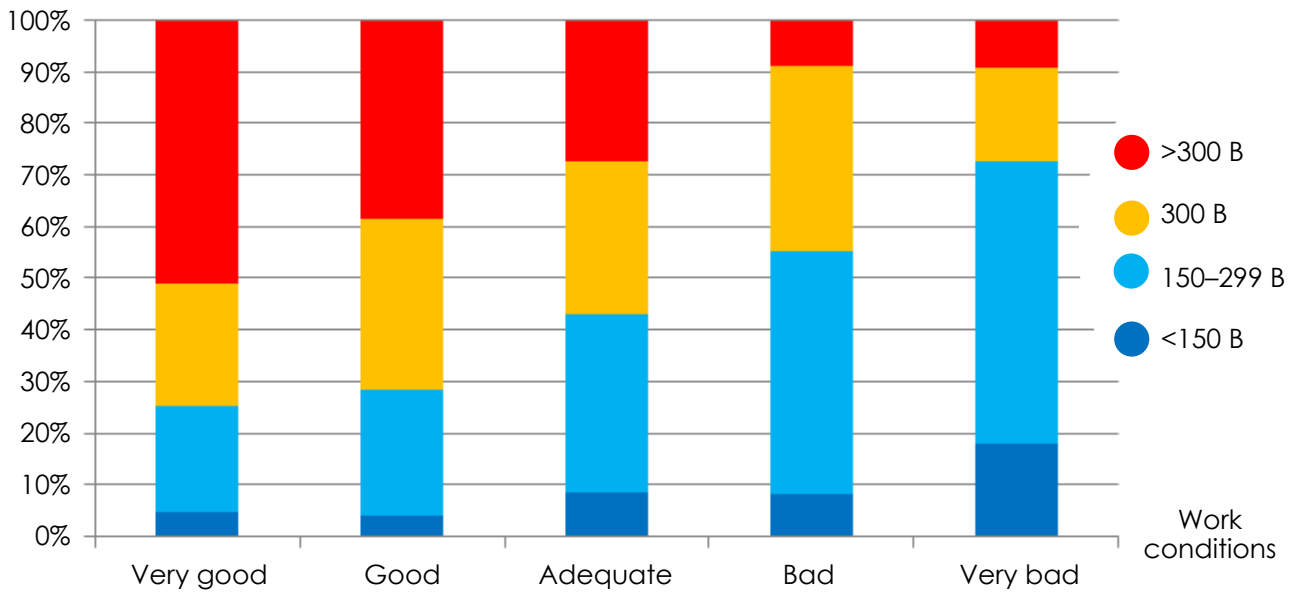
Footnote

[1] There are seven regions, seven states and one union territory in Myanmar. The regions can be described as ethnically predominantly Bamar, while the states predominantly consist of other ethnic groups.

[2] "Colour cards" are identity cards of different colours with identification numbers given to members of ethnic minorities more than 12 years of age by the Ministry of Interior's Department of Provincial Administration, which has implemented this classification system for various groups of ethnic minorities in Thailand since 1992.

Chapter 3
Likelihood of return migration

3.1 Return prospects of the surveyed migrants

Main findings

▶ 79.9 per cent of the surveyed migrants expressed their willingness to go back to Myanmar in the future, and 20.1 per cent said they wanted to stay in Thailand forever or had no intention to return to Myanmar at this point in time. Little gender difference was observed.

▶ The length of stay in Thailandis the major variable that determines whether a migrant will want to return to Myanmar or not. The longer a migrant has stayed in Thailand, the less he or she would be willing to go back (only 55.6 % of those who have lived in Thailand for more than 20 years want to return).

▶ Having a legal option to settle down in Thailand was another major variable influencing migrants' willingness to return; only 43.0 per cent of migrants who have coloured cards wish to return. Otherwise, the better documented a migrant is, the more willing he or she will be to return (82.5 % among those fully documented, 81.1 % among those temporarily documented, and 77.3 % among those who were undocumented).

▶ A much lower percentage of surveyed migrants living in Kanchanaburi want to return (27.8 %) compared with those in other provinces.

▶ A slightly lower percentage of migrants who have all children below 15 years old living in Thailand (72.8 %) want to return.

▶ A slightly lower percentage of migrants who came to Thailand because of security/safety reasons (74.9 %) want to return

▶ No significant correlation was observed between s migrant's employment sector (across provinces) and his or her willingness to return.

▶ A higher percentage of migrants belonging to the higher income group expressed their wish to return (83.7 %).

3.1.1 Migrants' willingness to return

Some 79.9 per cent of the surveyed migrants expressed their willingness to go back to Myanmar in the future, and 20.1 per cent said they wanted to stay in Thailand forever or had no intention to go back to Myanmar at the time of the survey. The percentage of female (79.1 %) migrants who expressed their willingness to return was almost same as that of males (80.5 %).

Among those who indicated their willingness to return, 82.0 per cent indicated that their decisions have been influenced by the recent political and economic changes in Myanmar. As figure 16 shows, male migrants were more likely to be influenced by the changes in Myanmar than females (84.2 % compared with 79.7 %).

Figure 16: Economic and political changes in Myanmar as a factor in migrants' willingness to return to Myanmar, by gender
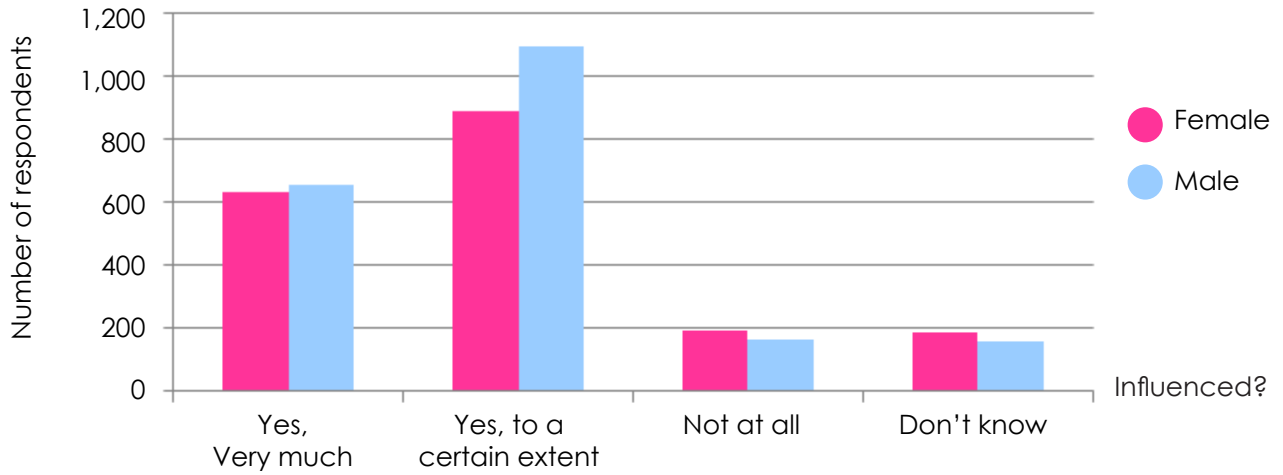
3.1.2 By length of stay in Thailand

One of the strongest determinants of whether or not a migrant will want to return to Myanmar is the length of his or her stay in Thailand. As Figure 17 shows, the longer a migrant have stayed in Thailand, the less he or she would be willing to go back. Among migrants who have stayed in Thailand for more than 30 years, only 44.1 per cent indicated that they wanted to return to Myanmar.

Figure 17: Percentage of surveyed migrants who are willing to return, by length of stay in Thailand
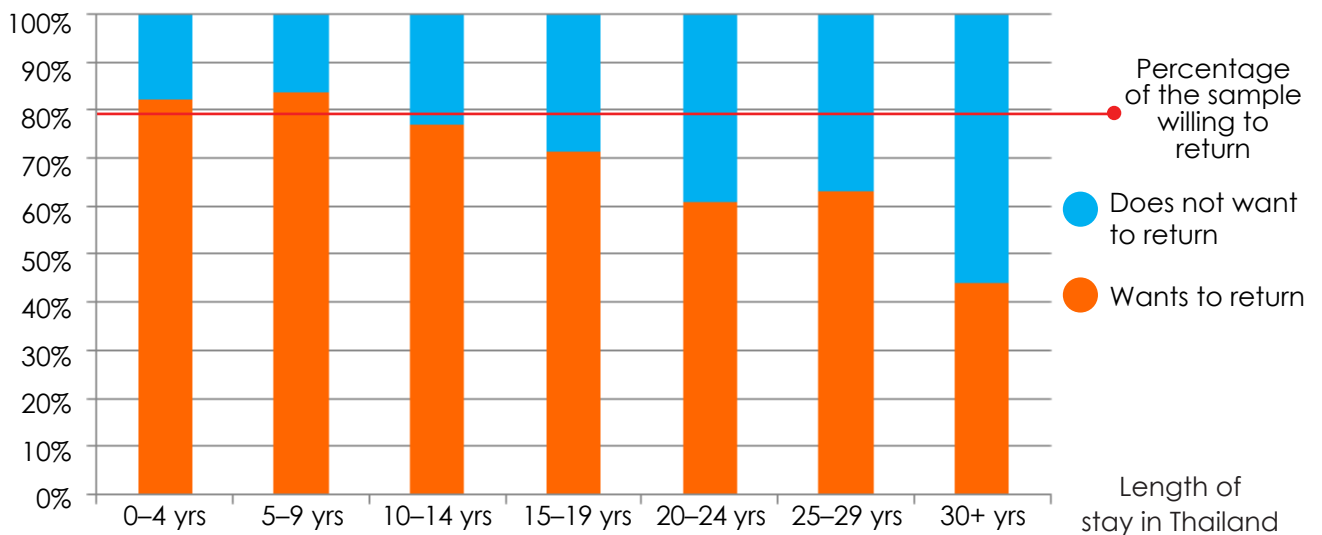
3.1.3 By documentation status

A much lower proportion (43.0 %) of migrants who held coloured cards wanted to return, compared with migrants with other documentation statuses (Figure 18). Coloured cards give migrants a formal opportunity of permanent residence, and this option has provided a great incentive for migrants to choose to settle down and integrate in Thailand.

Among migrants who do not have the option of permanent residence, those who were better documented were slightly more willing to return. The proportions of migrants wanting to return were 82.5 per cent among those fully documented, 81.1 per cent among those temporarily documented and 77.3 per cent among the undocumented. This tendency may be explained by the differences in the income level among the different documentation statuses.

Figure 18: Surveyed migrants' willingness to return, by documentation status in Thailand
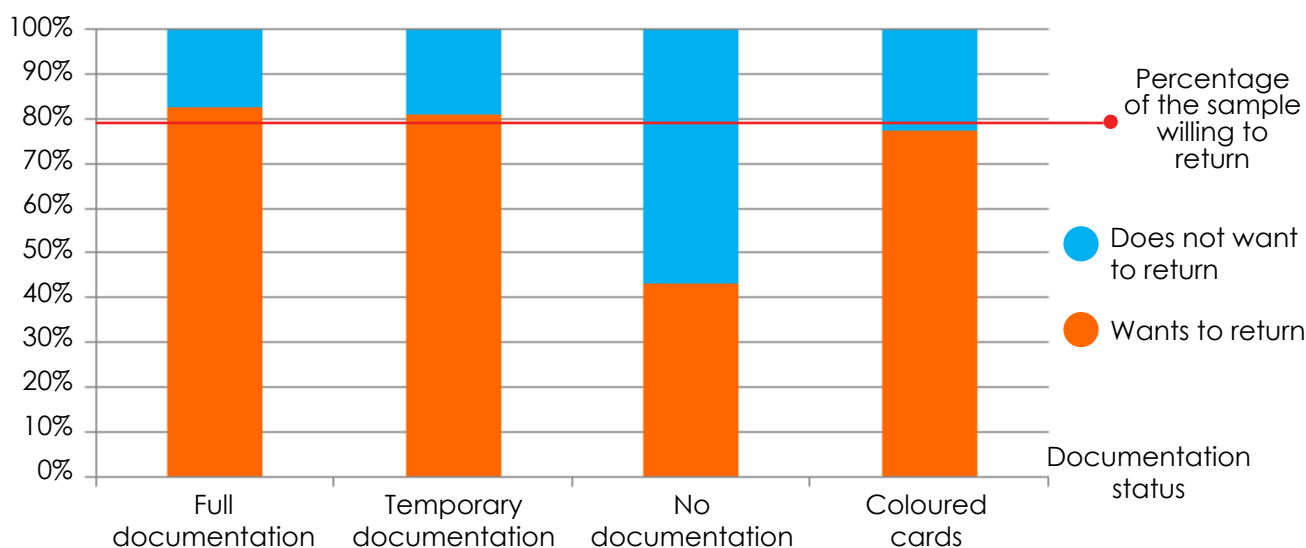
3.1.4 By children's location

A majority of migrants, with or without children, indicated that they wanted to return to Myanmar. However, a higher percentage of migrants with all of their children in Myanmar (90.7 %) expressed a willingness to return, compared with only 72.8 per cent of migrants with all of their children living in Thailand (Figure 19).

Figure 19: Percentage of surveyed migrants willing to return, by children's location
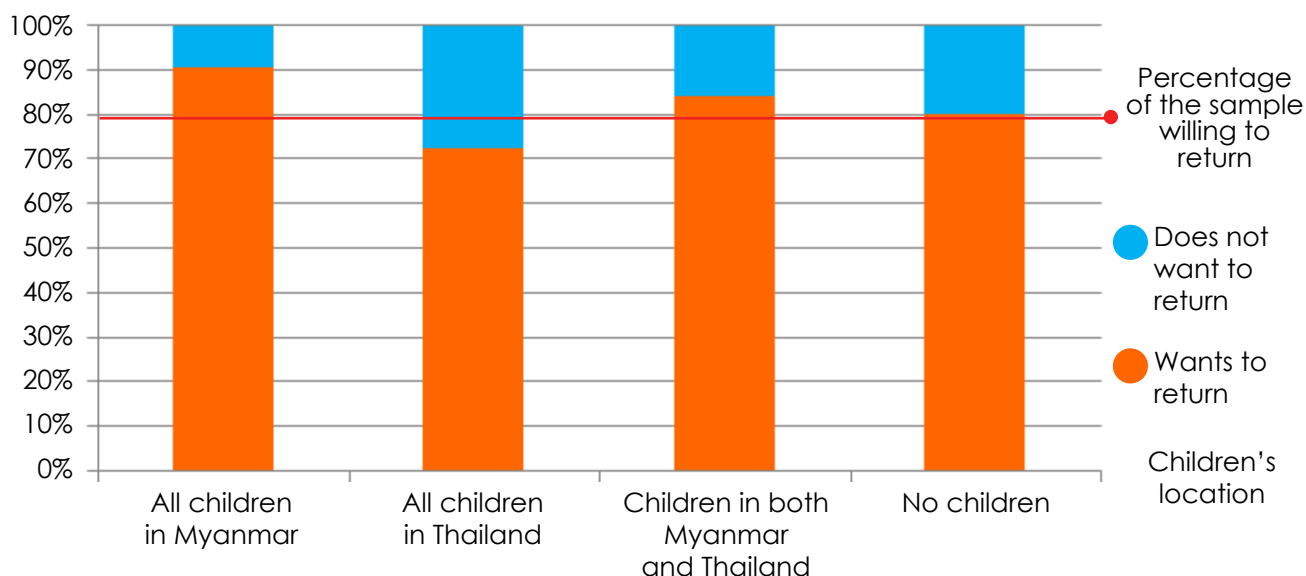
According to interviews with children of migrants currently staying in Thailand, most of their parents would prefer to take their children back to Myanmar with them when returning. However, some parents would choose to let their children continue their studies and/or employment in Thailand when they return to Myanmar.[1]

3.1.5 By reasons for migrating to Thailand

There was some variation in the willingness to return based on the given reason for migrating to Thailand: a higher proportion of those who migrated for economic reasons (81.0 %) than those who cited security/safety reasons (74.9 %) indicated a willingness to return to Myanmar (Figure 20).

Figure 20: Percentage of surveyed migrants willing to return, by primary reason for migrating to Thailand
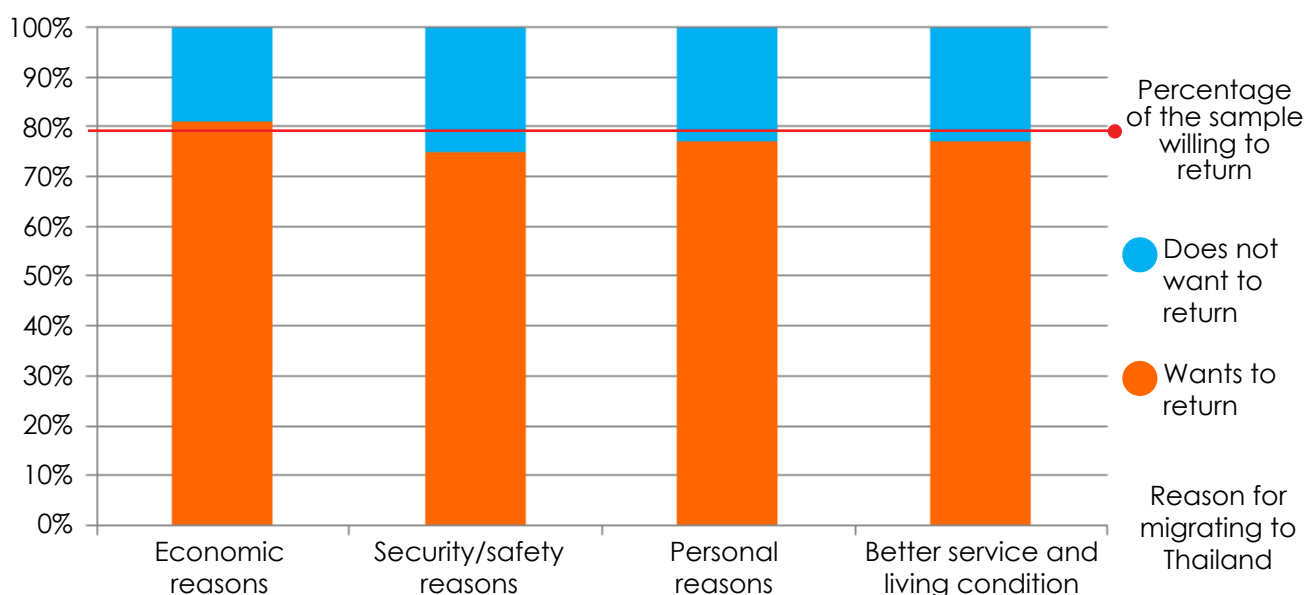
It is also worth noting that the willingness to return among migrants who came to Thailand due safety and security reasons is much higher than among displaced persons living in temporary shelters along the Myanmar–Thailand border.[2]

Some of the reasons that could explain the difference in the willingness to return between migrant workers and displaced persons living in camps include:

(a) Out-of-camp populations do not receive as many services and support as displaced persons in temporary shelters.

(b) Out-of-camp populations are more mobile and are less likely to form a strong community to which they feel a strong sense of belonging.

(c) Out-of-camp populations have better control over when and how they want to go back; hence, they feel more positive and think more proactively about the return.

(d) Out-of camp populations have had an opportunity to work as migrant workers, and thus to save money and have funds to reestablish their lives upon return.

(e) For out-of-camp populations, the options are either to stay in Thailand or go back to Myanmar, whereas for the displaced persons in the temporary shelters, resettlement to a third country is considered another option.

3.1.6 By income level in Thailand

Figure 21 shows a weak positive relationship between level of income and willingness to return to Myanmar, although the relationship is not statistically significant.

Figure 21: Surveyed migrants'willingness to return, by income level
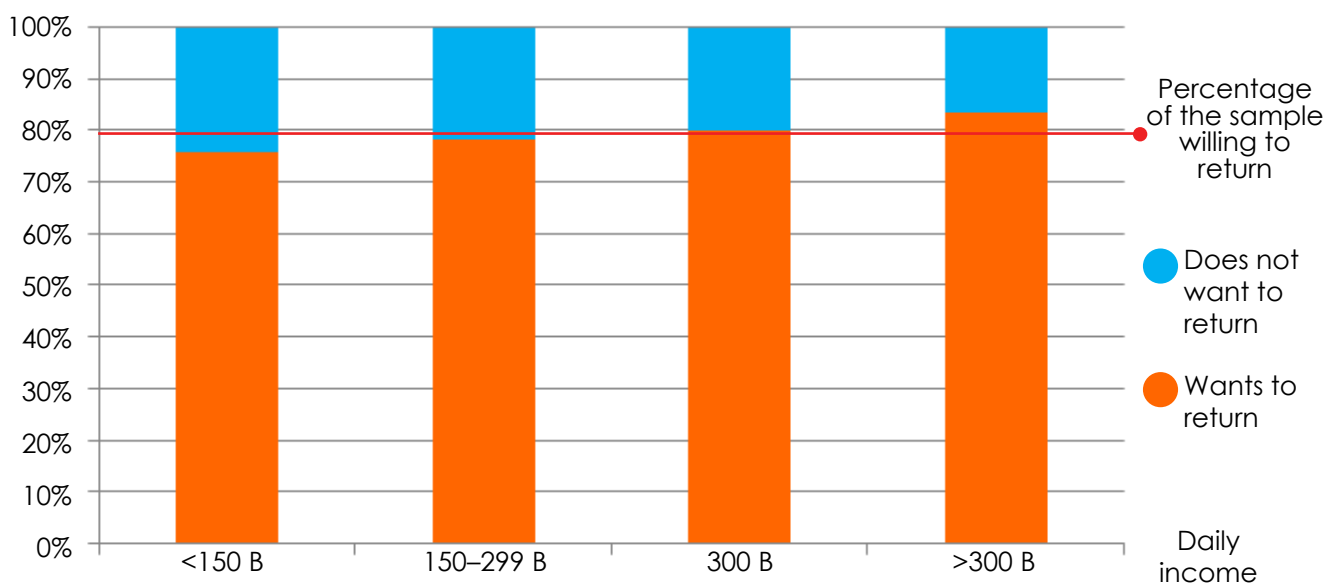
3.1.7 By employment sector in surveyed provinces

No particular tendency was observed in the provinces covered by the survey concerning the link between a migrant worker's employment sector and the willingness to return. This is despite the fact that there were significant variations across employment sectors and provinces in income levels.

The only exception was Kanchanaburi Province, where fewer than 30 per cent of respondents across all employment sectors expressed their willingness to return, which was much lower than for other provinces. The surveyed migrants in Kanchanaburi Province were different from migrants in other provinces in that they tended to have been staying in Thailand longer and a higher proportion of them held coloured cards. These factors might have contributed to the lower percentage of migrants in Kanchanaburi wanting to go back to Myanmar, especially as the migrants' willingness to return was not correlated with level of income.

3.2 Reasons for wanting to go back to Myanmar

Main findings

▶ The most common primary reasons for wanting to go back to Myanmar were personal (77.9%). However, changes pertaining to Myanmar itself were the most cited secondary reasons among the migrants surveyed(43.3%).

▶ While gender differences concerning the reasons for wanting to go back were small, the largest gender difference was observed among migrants who cited business and employment opportunities in Myanmar as the primary reason: twice as many male migrants as female migrants cited this reason.

▶ Although only 10.6 per cent said their primary reason for wanting to go back was related to conditions in Thailand, 25.8 per cent of respondents gave it as the secondary reason. The conditions in Thailand were more frequently cited among migrants in the lower income groups.

The most common reasons for wanting to go back to Myanmar cited by migrants were personal (77.9%). These include the desire to goback to families and friends, having stayed long enough in Thailand, and having saved enough money. 11.5 per cent indicated that their main reason for wanting to return was related to changes in Myanmar, including greater security and safety, greater business and employment opportunities, and better infrastructure and services. Lastly, 10.6 per cent of migrants indicated that their main reason for wanting to return was related to conditions in Thailand, such as feelings of being exploited or discriminated against, not having been able to save money, not liking the life in Thailand, and having troubles with their legal status.

3.2.1 Primary and secondary reasons for returning

Female migrants (81.1%) were more likely than male migrants (75.0%) to cite personal reasons as the primary reason (Figure 22). In turn, more male migrants (13.6%) than female migrants (9.2%) cited the changes in Myanmar as the main reason for wanting to return. Among them, twice as many male as female migrants indicated business and employment opportunities in Myanmar as their main reason.

Changes in Myanmar were the most cited secondary reason for wanting to return, reported by 43.3 per cent of surveyed migrants. Gender differences among the secondary reasons were smaller than among primary reasons.

Figure 22: Reasons for going back to Myanmar reported by migrants who expressed their willingness to return, by gender and primary and secondary reasons
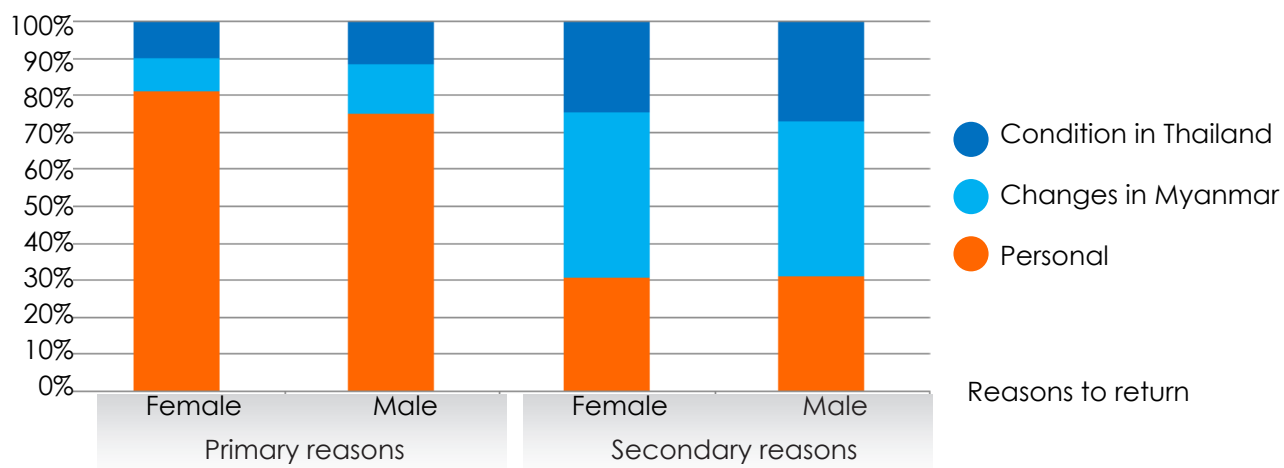
Similarly, more migrants (25.8%) reported conditions in Thailand as their secondary reason for returning than as the primary reason. Thus, for one in every four migrants, unfavourable conditions in Thailand have influenced their consideration to return to Myanmar. Among those who cited conditions in Thailand as their primary reason for wanting to return, 50 per cent earned less than the minimum wage (Figure 23).

Figure 23: Primary reasons for going back to Myanmar reported by migrants who expressed their willingness to return, by income level
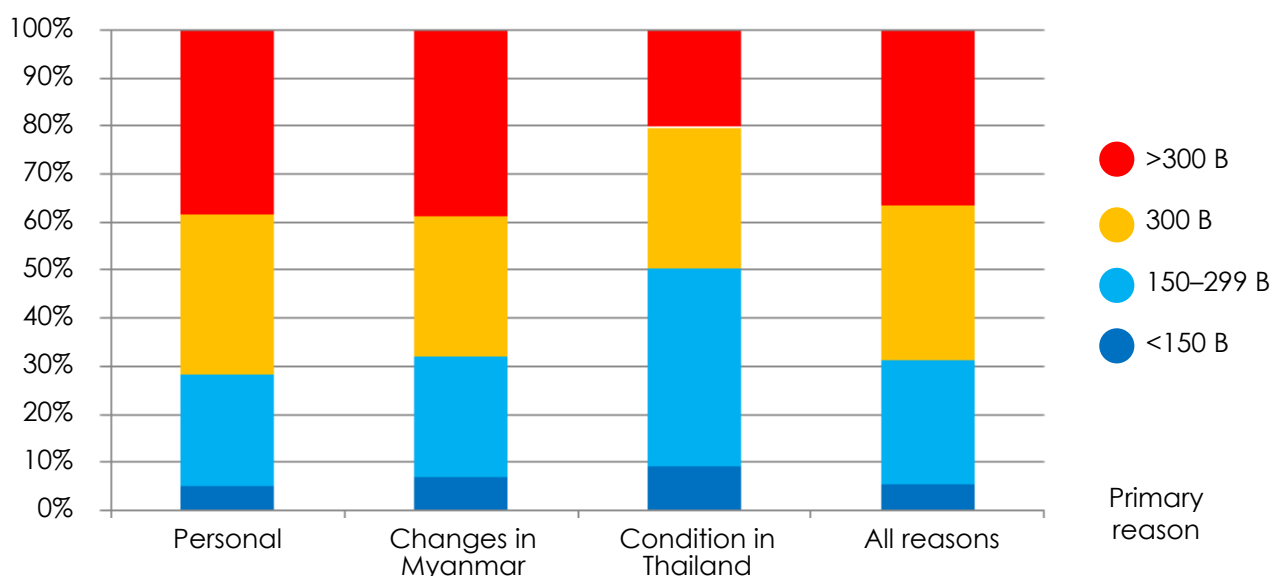
Furthermore, a higher percentage of migrants in the lower income levels (67.2%) feel discriminated against compared with those in higher income levels (32.8%). Migrants with lower incomes also struggled to accrue savings, representing only 34.4 per cent of the migrants who expressed they have enough savings.

3.2.2 By employment sector in surveyed provinces

Across all major employment sectors, personal reasons are the primary motivation for migrants' willingness to return to Myanmar with migrants in non-border provinces tending to cite this slightly more frequently than those in non-border provinces. This may be explained by the fact that a greater number of migrants in non-border provinces have left their children behind in Myanmar and are thus hoping to go back to them. In contrast, slightly higher percentages of migrants in border provinces cited as their primary reasons changes in Myanmar or conditions in Thailand (figure 24).

Figure 24: Primary reasons for going back to Myanmar reported by migrants who expressed their willingness to return, for the three major employment sectors in each province
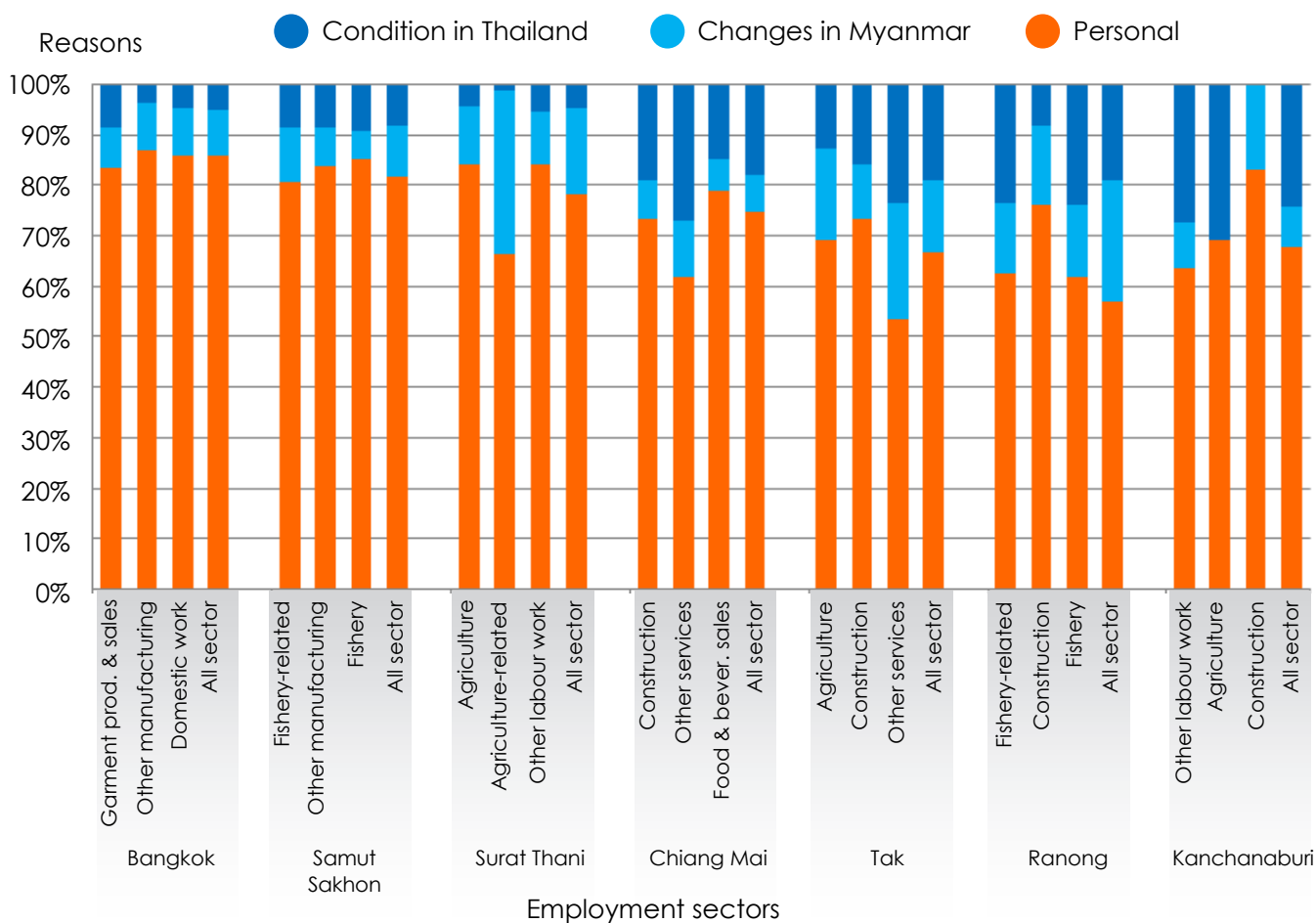
Future education opportunities in Myanmar pose a concern for children of migrants, especially those who are currently studying in Thailand. These children already have access to education in Thailand and expressed their concern about the overall lack of access to education, the possibility of pursuing their studies to higher education and the quality of education in Myanmar.[3]

3.3 Planned time frame for return

Main findings

▶ Some 54.5 per cent of the surveyed migrants who expressed their willingness to return had a time frame for their return to Myanmar, with 30.4 per cent reporting that they planned to return within three years. In contrast, 45.5 per cent said they had no time frame in mind.

▶ Male migrants tended to have a shorter time frame for return than females.

▶ Migrants with less secure documentation (temporary documentation or no documentation) were more likely to have a shorter time frame for return than migrants with more secure documentation.

▶ Migrants in Samut Sakhon and Tak, as well as migrants working in the fishery sector, had clearer time frames for return than migrants in other sectors and provinces.

Of those surveyed migrants who expressed their willingness to return, 54.5 per cent had a clear time frame for their return to Myanmar (Figure 25). Around 30.4 per cent reported that they planned to return within three years, and 24.0 per cent said they would return after three or more years. On the other hand, 45.5 per cent said they would want to go back someday, had not yet thought about the time frame.

Figure 25: The time frame for return among surveyed migrants who expressed their willingness to return
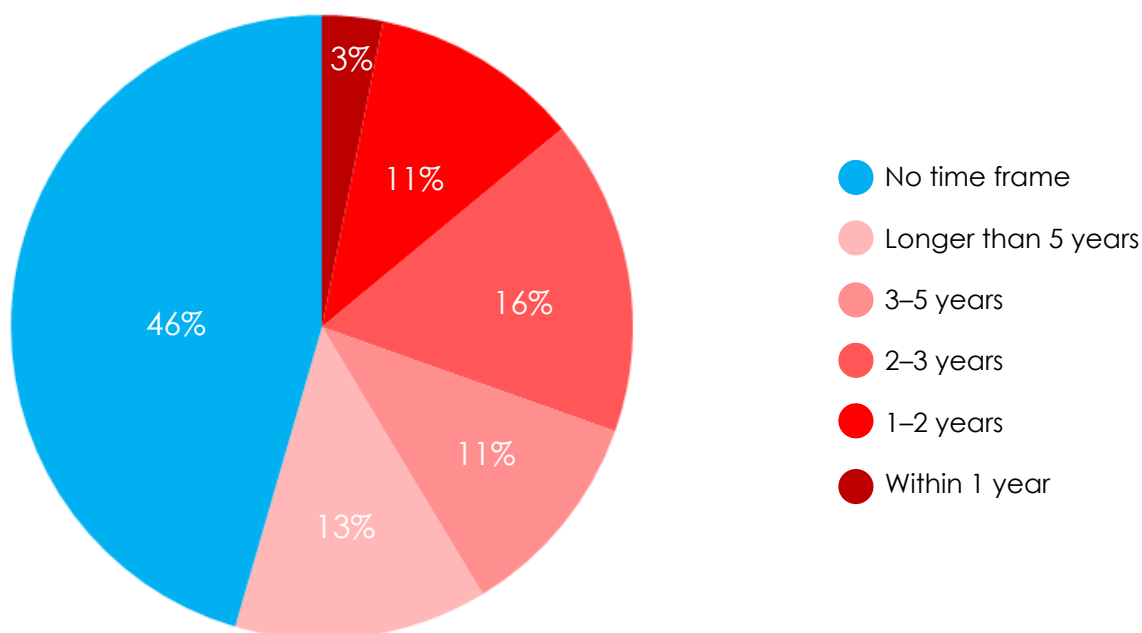
3.3.1 Gender differences

As Figure 26 shows, male migrants had a slightly shorter time frame for return than female migrants.

Figure 26: The time frame for return among surveyed migrants who expressed their willingness to return, by gender
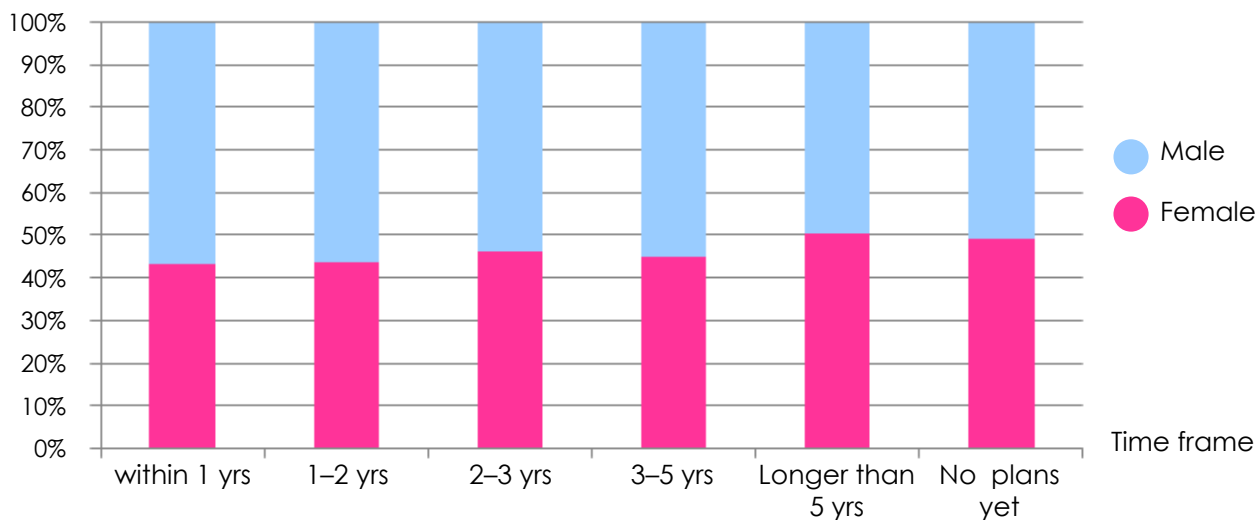
3.3.2 By documentation status

Figure 27 reveals that migrants with temporary documentation or no documentation have a shorter time frame for return than those with full documentation or coloured cards. 39.3 per cent of migrants without documentation and 33.1 per cent of those with temporary documentation were planning to return within three years, compared with 28.5 per cent of migrants with full documentation and 17.9 per cent of migrants with coloured cards.

Figure 27: The time frame for return among surveyed migrants who expressed their willingness to return, by documentation status
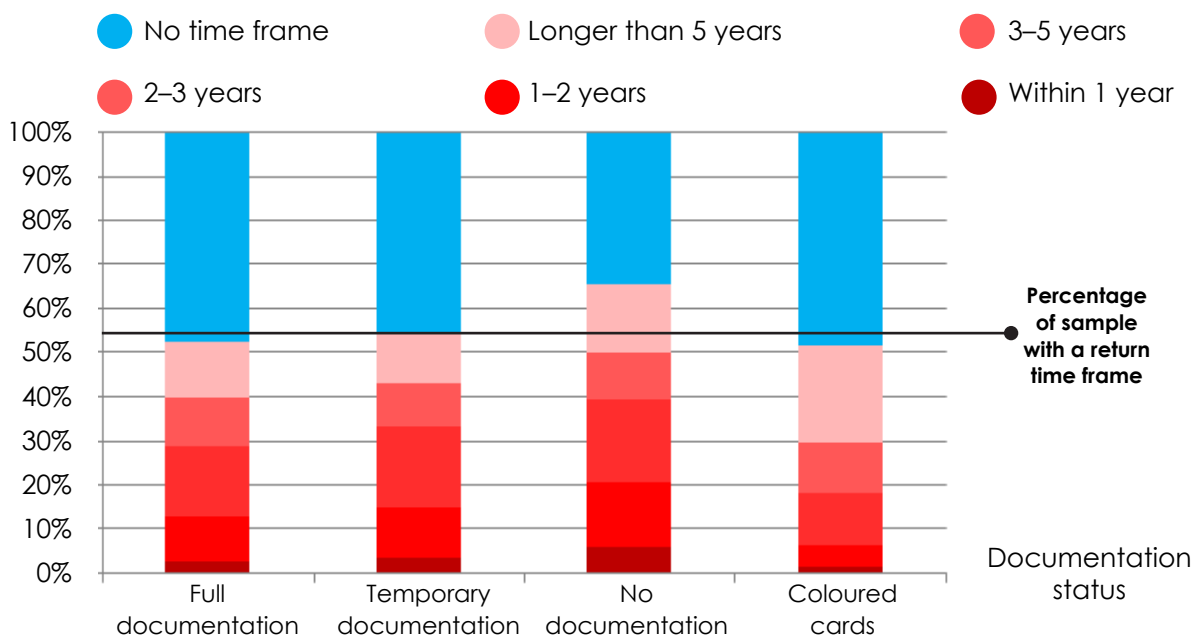
3.3.3 By employment sector in the surveyed provinces

Migrants in Samut Sakhon and Tak Provinces seemed to have a clearer time frame for return than migrants in other provinces. 68.2 per cent of migrants in Samut Sakhon and 70.1 per cent of those in Tak were able to indicate a definite time frame for return, compared with only 54.5 per cent of the entire sample (Figure 28).

Figure 28: The time frame for return among surveyed migrants who expressed their willingness to return, by documentation status, by job sector and province
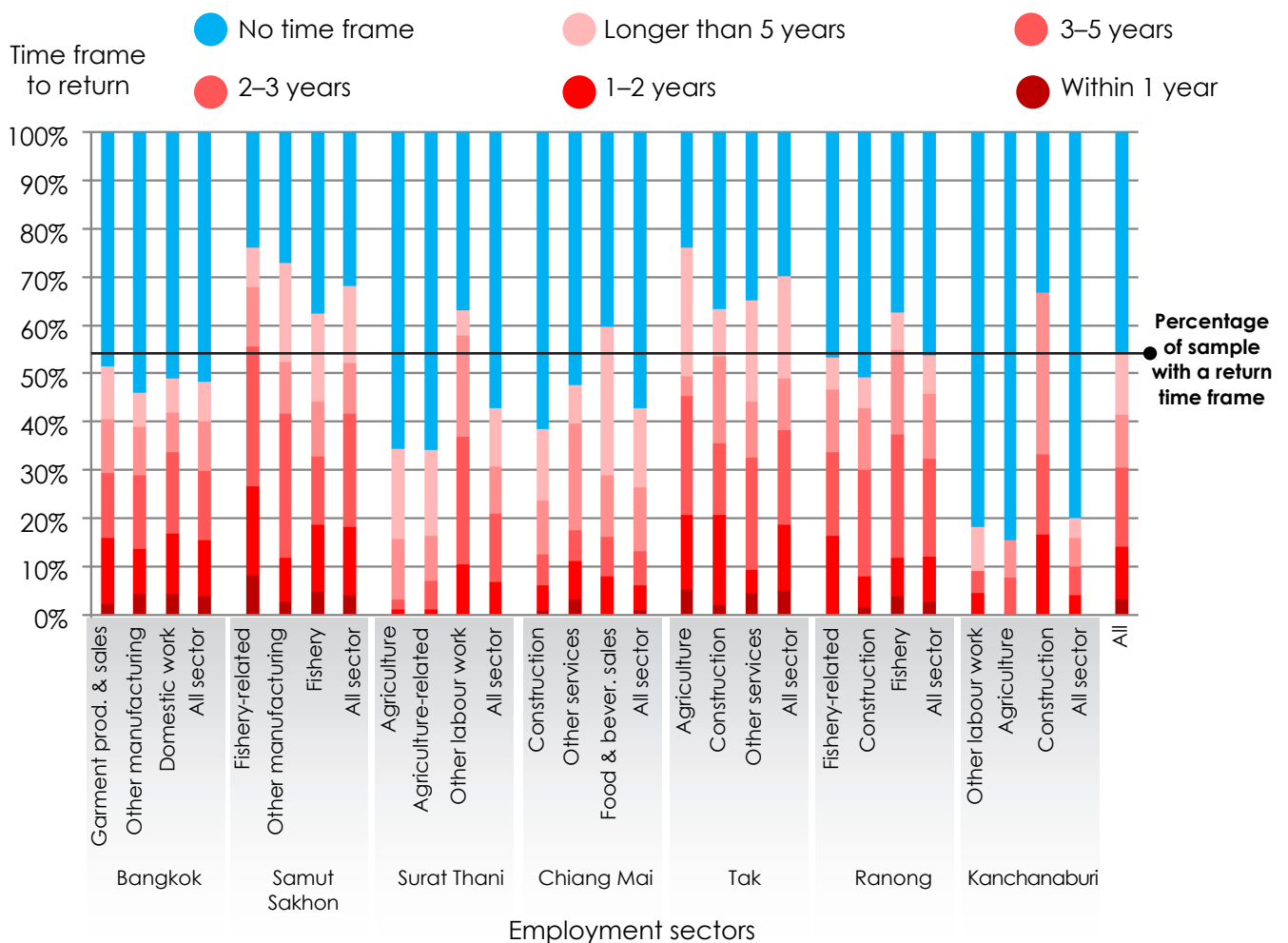
41.5 per cent of the migrants in Samut Sakhon and 38.3 per cent of those in Tak indicated that they would return within three years, compared with 30.3 per cent of the entire sample. Migrant workers in the fishery and fishery-related sectors in Samut Sakhon, the agriculture and animal husbandry sector in Tak, and the fishery sector in Ranong also had shorter time frames for return to Myanmar.

3.3.4 By income level

Migrants with the lowest income level are not only more willing than others to return within three years (40.8%), but are also more likely (67.0%) to have decided on a time frame for return (Figure 29).

Figure 29: Time frame for return by income level
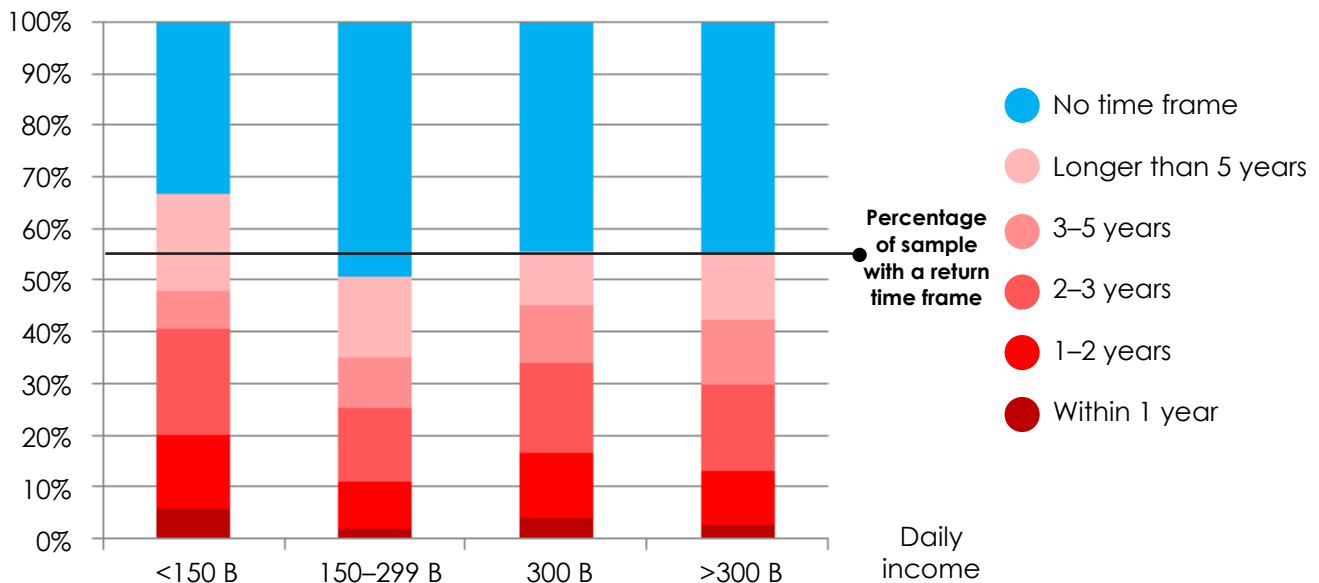
3.3.5 By length of stay in Thailand

Migrants who have been staying in Thailand for shorter periods of time are more likely to return to Myanmar sooner (Figure 30). While 54.5 per cent of the total sample had a time frame for return, among migrants who had stayed in Thailand for less than five years, 59.5 per cent had decided on a time frame and 33.9 per cent were ready to return within three years.

Figure 30: Time frame for return by length of stay in Thailand
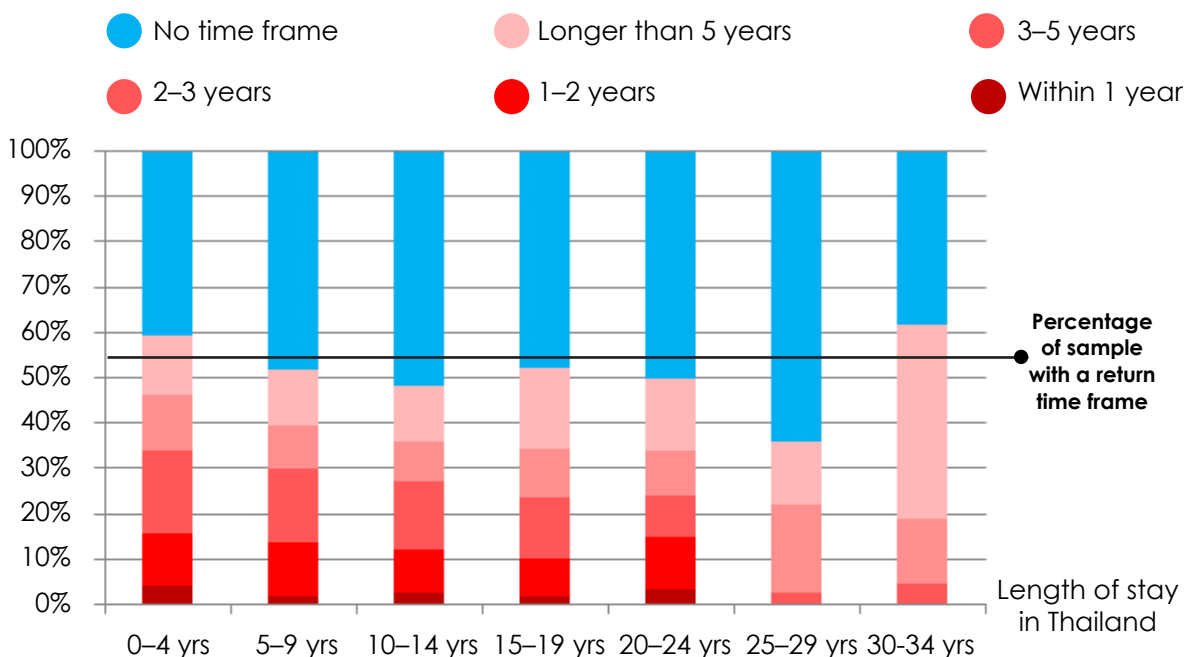
3.4 Minimum acceptable income level upon return

Main findings

▶ For 49.7 per cent of the migrants surveyed, the minimum level of income that would be acceptable to them once they are back in Myanmar would be the same as their current income in Thailand. A total of 63.8 per cent of respondents require the same as their income in Thailand or more.

▶ More migrants would consider lower income (35.8%) than demand a higher one (14.1%) except for migrants in the lowest income group.

▶ Current income, job sector and province of residence in Thailand were clear determinants of minimum acceptable salary when back in Myanmar.

▶ Migrants in Bangkok, Surat Thani and Samut Sakhon had the highest minimum acceptable income for their return to Myanmar, and those in Tak had the lowest.

Approximately half of the surveyed migrants (49.7%) indicated that the acceptable minimum income in Myanmar would be what they are receiving presently. However, more migrants (35.8%) would be content with a lower income than present, even if just "enough to survive", than migrants who would only accept a higher income than they are receiving currently (14.1%). There was no significant difference between genders, other than that more female migrants (19.0%) than male migrants (15.2%) would settle for income "enough to survive".

In addition, there was no significant difference in minimum acceptable income level between migrants of different ethnicities or migrants from different places of origin in Myanmar. However, a slightly higher proportion of migrants who had very bad living conditions before migrating to Thailand would accept a lower income (50.0%) versus 35.8 percent of all respondents.

3.4.1 By level of income

Figure 31: Acceptable minimum wage in Myanmar, by level of income in Thailand
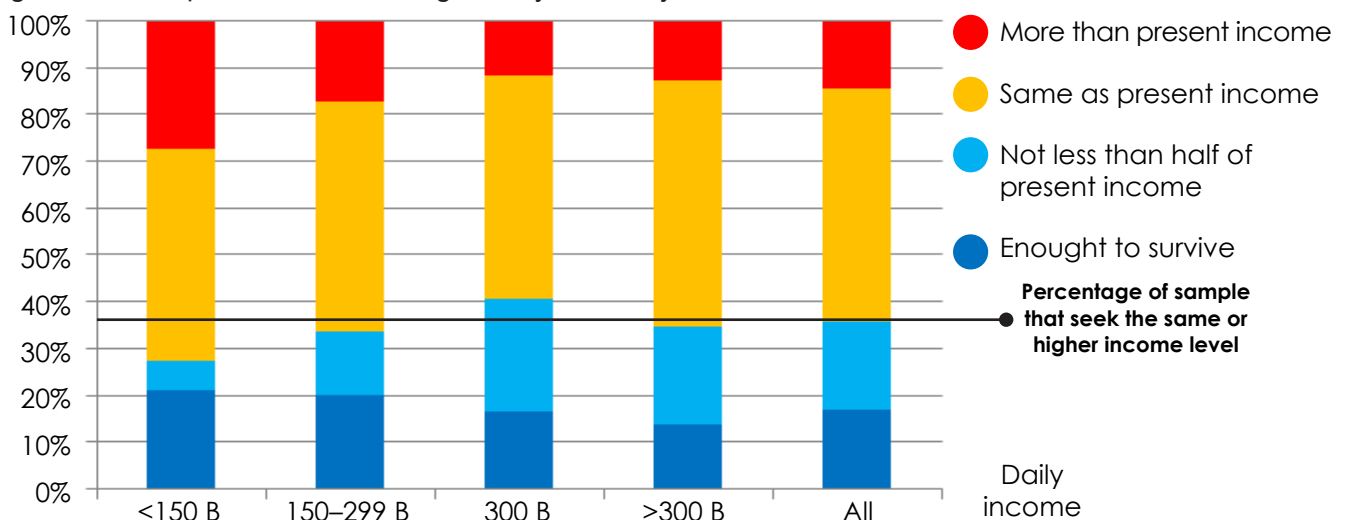
A larger percentage (27.1%) of migrants in the lowest income group, earning less than one half of the minimum wage in Thailand, would require a higher income than what they are receiving in Thailand. Similar results were found with undocumented migrants. The proportion of migrants willing to accept the same income or more decreased slightly among migrants in the higher income group (Figure 31).

3.4.2 By employment sectors and provinces

Although for each province majority of the respondents would accept the same income as they are receiving at present, there still are notable differences between provinces and job sectors. Chiang Mai has a clearly larger portion of migrants who would settle for income which is "enough to survive" in Myanmar, especially in the construction sector. In all provinces apart from Tak, a larger portion of migrants would accept an income lower than what they presently earn rather than demand for a higher income when back in Myanmar.

There is no clear trend for minimum acceptable salary as far as job sector is concerned (i.e. comparing the same job sector across the different provinces). The results show, for example, that nearly half of the migrants in the construction sector in Chiang Mai would incomes lower than what they presently earn, while in Ranong a clear majority would only accept the same or a higher income. Furthermore, there are no clear similarities between border and non-border provinces as to current level of income (see Figure 12 and 32).

Figure 32: Acceptable minimum wage in Myanmar for the three major employment sectors in each province
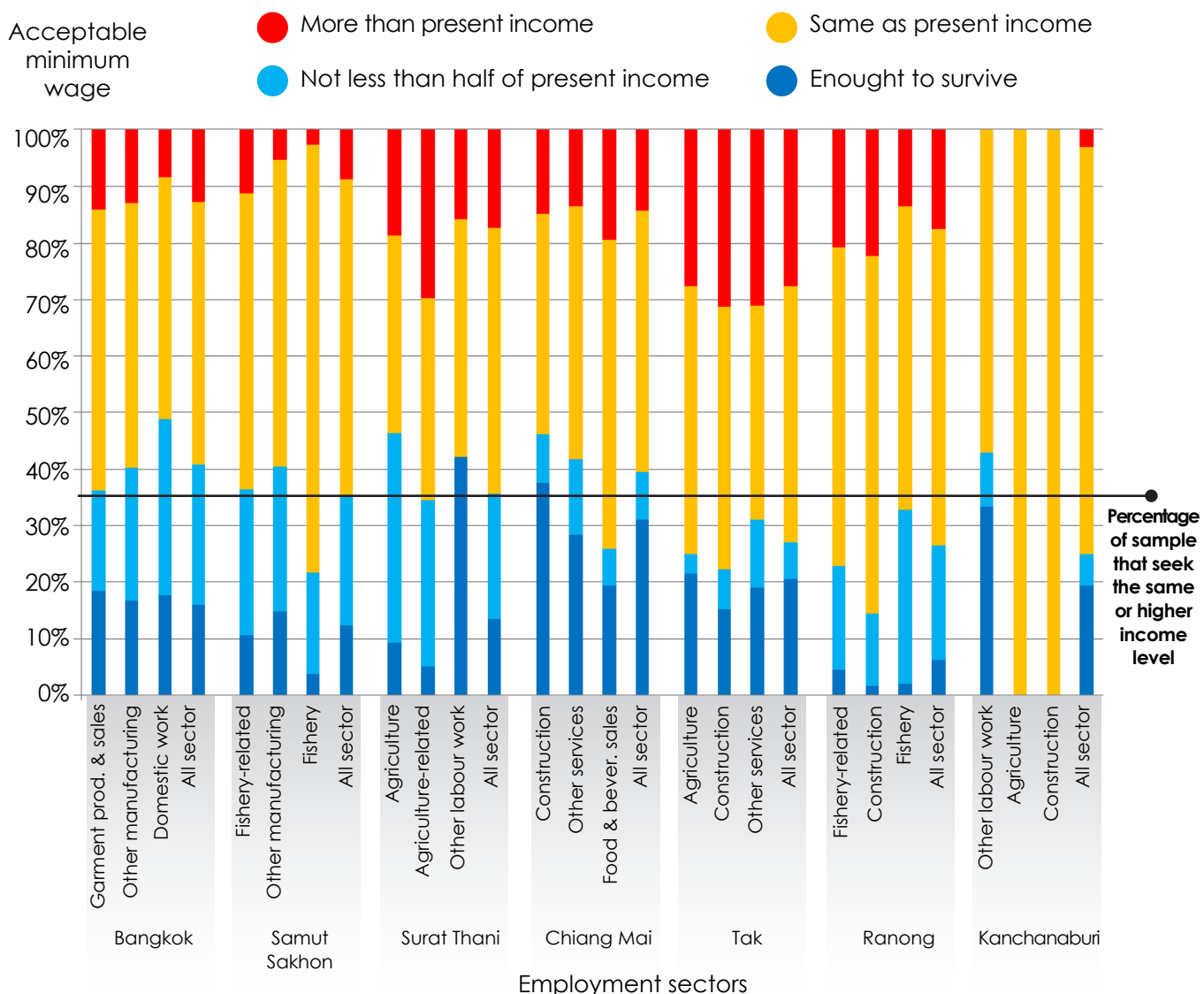
3.5 Destination and employment upon return

Main findings

▶ The majority of migrants want to go back to their hometowns or villages (77.6%) and to their families and friends (13.3%), and almost no gender difference was observed. Few were willing to move to where the jobs are, regardless of their preferred job sector.

▶ A slightly higher percentage of the Bamar, the Shan and the Kayin than of the other ethnic groups are willing to move to where the jobs are.

▶ Most migrants prefer to engage in farming own land (32.7%), opening a small business (20.9%), selling food and beverages (19.3%) and trade and retail (14.3%) when they return to Myanmar; these preferences correspond to migrants' preferred return destinations.

▶ Two thirds of the migrants who prefer to farm their own land when they return to Myanmar come from a landowner background, and 75.0 per cent of them are originally from rural areas in Myanmar.

▶ The preferred job after returningto Myanmar correlates more strongly with the type of job held prior to migrating than with the job currently held in Thailand.

Despite forecasted economic development and job creation in Myanmar, only a small minority of both female and male migrants (2.7 %) planned to move specifically to where there are jobs or to the big cities (Figure 33). A clear majority of migrants (91.2%) wanted to return to their hometowns or to reconnect with their family and friends.

Figure 33: Surveyed migrants' preferred return destination by gender
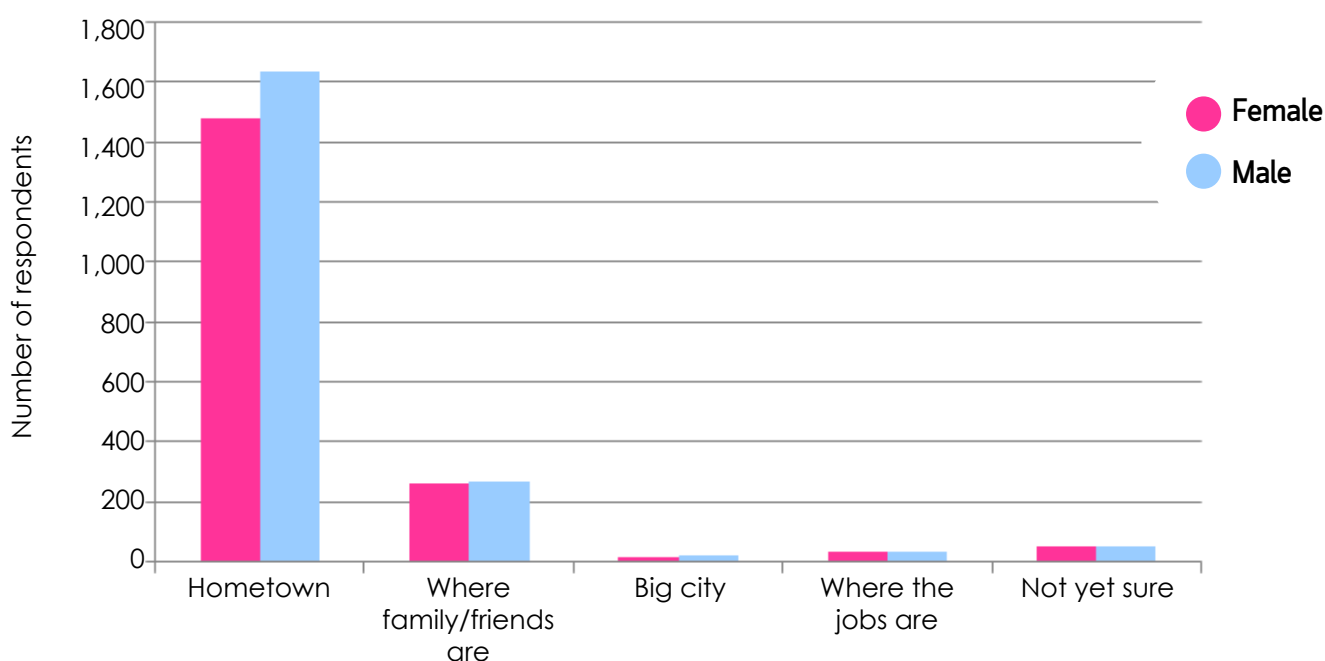
3.5.1 By ethnic group

Migrants from most ethnic groups, especially the Mon and the Shan, mirrored the overall preference of respondents to engage in farming their own land upon return to Myanmar (Figure 34). The Kayin were the only group who preferred starting their own business to farming, and a slightly larger percentage of the Kayin than of other ethnic groups were willing to move to where the jobs are.

Figure 34: Preferred type of employment in Myanmar, by ethnic group
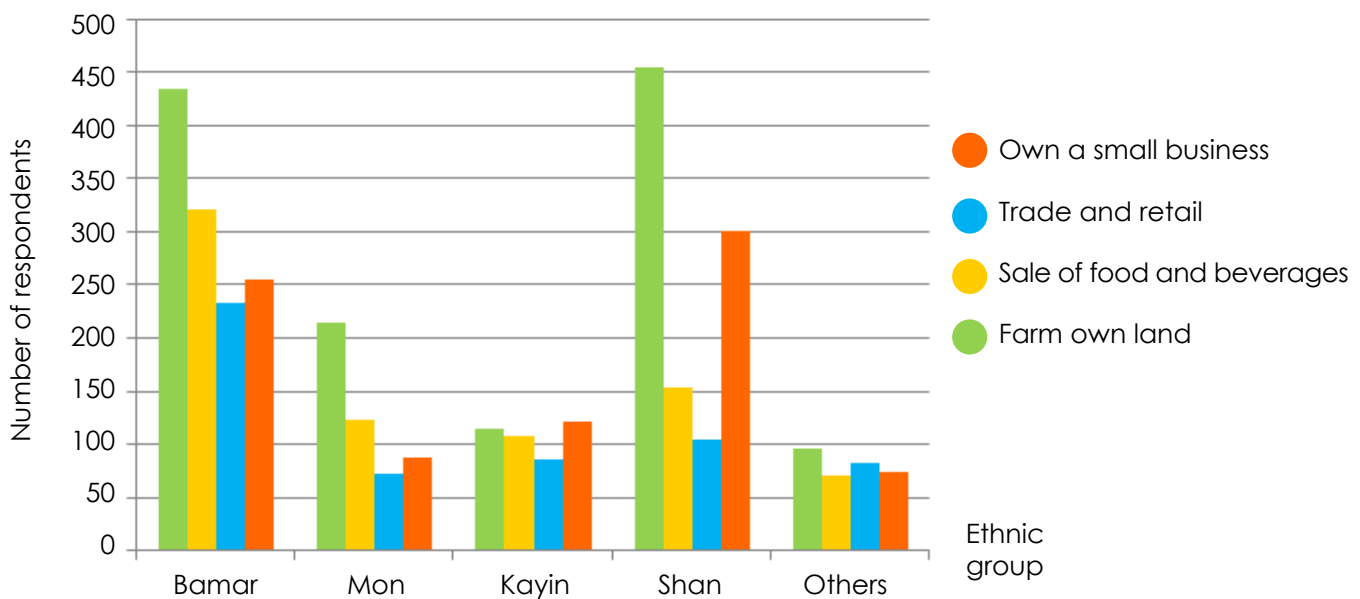
3.5.2 By skill and employment sector in Thailand

Although over half of the migrants felt they have gained useful skills while working in Thailand, it had very little effect on their willingness to return to where the jobs are or stay in their current job sector when they return to Myanmar. However, a high proportion of migrants who had been farmers in rural areas prior to migrating to Thailand preferred to work again as farmers when they return to Myanmar.

A majority of migrants preferred to engage in four main types of job upon returning to Myanmar: farming their own land (32.7%), opening a business (20.9%), selling food and beverages (19.3%) and engaging in trade and retail (14.3%). Although a high proportion of all migrants (77.6%) wanted to return to their hometowns and villages, those who preferred to farm their own land are also most often from rural areas (75.0%) and are most likely to return to their hometowns/villages (85.1%) (Figure 35).

Figure 35: Number of migrants by preferred type of job upon return and proportions of migrants in each job category who plan to return to their hometown and those who came from rural area
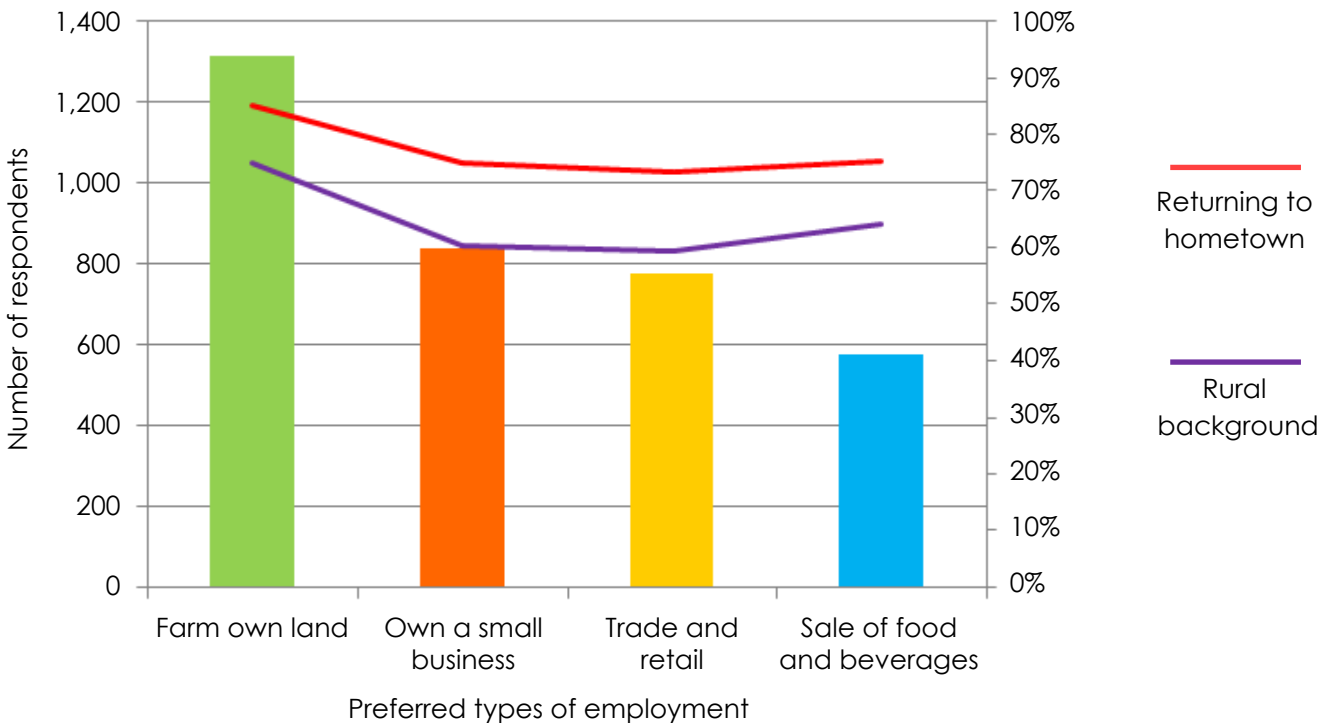
A majority of migrants who preferred to engage in farming when they return to Myanmar had a landowner background prior to migrating (66.7%) and were originally from rural areas (75.0%). In Thailand a majority of them held jobs in various industries (35.3%) and the construction sector (24.3%). Generally, in Thailand migrants hold a wide variety of jobs in Thailand that do not match their future employment preferences in Myanmar.

Footnote

[1] Focus group interviews with 22 children in Surat Thani, Samut Sakhon and Bangkok in July 2013.

[2] According to the Karen Refugees Committee (June 2013), 27 per cent of surveyed refugees (displaced persons) in Tham Hin camp indicated wanting to return if peace was guaranteed; according to UNHCR (September 2013), fewer than 10 per cent of surveyed refugees in Mae La camp preferred to return home to Myanmar one day. The remaining surveyed refugees wanted to stay either in Thailand or to be resettled in a third country.

[3] Focus group interviewswith , 13 children of migrants in Samut Sakhon and Bangkok, July 2013.

Chapter 4
Conclusion

This assessment has produced a broad understanding of the characteristics of Myanmar migrants in Thailand and their opinions concerning a possible return to Myanmar during an era of political and economic transformation in that country.

4.1 Summary of findings

Salient findings of the assessment include those discussed below.

▶ Some 79.9 per cent of the migrants in the survey are willing to return to Myanmar someday, and only 20.1 per cent of them are either planning for permanent settlement in Thailand or have no prospects for return at this point in time.

▶ Two major factors affecting the decisions of migrants concerning their return include the length of their stay in Thailand and the option for permanent residency in the country. This is particularly the case with migrants who have lived in Thailand for more than 20 years and/ or with those who have coloured cards. To a lesser extent, migrants with all of their children living in Thailand were less likely to have plans to go back to Myanmar. These three factors are all interrelated and indicate that legal and social integration in Thailand strengthens amigrant's prospects of remaining in the country rather than returning to Myanmar.

▶ Slightly higher levels of interests in return were observed among migrants with full documentation status and those receiving higher incomes. Migrants in thelatter category are typically in the process of achieving the objective of migrating to Thailand, as they have saved enough money and are better able to plan their next step, i.e., return. However, when it comes to the time frame for return, the better documented and higher-income migrants have a longer or less fixed time frame in mind than those with less secure documentation or lower incomes.

▶ Migrants who have a less secure documentation status and those with lower incomes, on the other hand, are slightly less interested in going back to Myanmar; this probably has to do with the fact that they are not yet at the stage of being able to think about return. However, among the migrants with lower incomes or less secure documentation who expressed their willingness to go back, a greater percentage have clearer and shorter time frames for return than respondents with higher incomes or full documentation.

▶ Such other factors as gender, ethnic group, place of origin, reason for migrating to Thailand, and employment sector seem to have little impact on the willingness of migrants to return or on their time frame for return.

▶ Personal reasons, especially the desire to be back in their hometowns/villages and to be reunited with families and friends, dominate migrants' primary reasons for wanting to return. However, better business and employment opportunities, as well as greater security, safety and services in Myanmar were reported as the second most important reason for nearly half of those who want to return. Unfavourable working or living conditions in Thailand constituted only a minor part of the migrants' motivation for return. However, migrants in the lower income groups or those who reported bad working conditions are more influenced by these unfavourable conditions in Thailand than migrants in the higher income groups.

▶ There is little connection between the jobs the surveyed migrants have in Thailand and the ones they prefer to go back to in Myanmar. Instead, more migrants planning to return prefer to go back to the same jobs they had in Myanmar before they migrated to Thailand. This reflects the realities of the available jobs in their preferred destinations, which, for most respondents, are their hometowns or villages. The fact that a large percentage of migrants indicated that they wanted to return to their home towns or villages and that few migrants are willing to move to where the jobs are indicates that the respondents do not want to become migrants again – this time as internal migrants – but would rather settle down where they feel at home and would rather take the jobs that they can find in these locations.

▶ Majority of the surveyed migrants would consider at least their current level of income in Thailand as minimum acceptable salary when they return to Myanmar; however, such expectations arecurrently not in line with the prevailing wagesin Myanmar. Current income level, which largely depends on job sector and location (i.e. province), is causing variation in the actual amount that migrants would accept once they have returned. Migrants in provinces with higher income levels, and thus where more migrants have already managed to make savings, are less inclined to demand their current salary level when they return to Myanmar while migrants in lower income groups would only accept higher incomes than they are currently receiving.

4.2 Future considerations

What do these results tell us? The data show that presently there are still a lot of uncertainties in terms of how soon and at what speed the changes in the migration patterns of Myanmar migrants will take place and how they will impact Thailand's economy. Nonetheless, there are a number of important issues that have come up for further consideration.

First, the majority of migrants came to Thailand with the objective of earning a satisfactory income, and they regard their stay as a temporary period of economic opportunities, after which they can return home. Income level and working conditions may influence the timing of the actual return; compared to migrants in lower income groups, those who have satisfactory working conditions and better incomes are more likely to remain uncertain about return and to have a longer-term plan about when they are actually going back to Myanmar. For the majority of these migrants, however, the intention is not to opt for permanent residency in Thailand.

A finding that became clear from this assessment is that fully documented and decently paid migrants have better levels of satisfaction working in Thailand and more positive attitudes towards return, although their planned return time frames are longer. While a future constraint in the supply of migrant workers

from Myanmar may prove to be a challenge for Thailand, the recommended strategy would be to provide migrants with the opportunity to be documented and to have decent wages and workconditions, to increase their positive migration experiences and their willingness to be employed in Thailand.

Taking into consideration the expected increases in the labour demand in both Thailand and Myanmar in the coming years, it is predicted that the job sectors which will be most impacted from their inability to fill their labour needs are be those which currently pay migrants inadequate wages. These include various job sectors in Tak, especially agriculture; various job sectors in other border provinces, and fisheries in Samut Sakhon. Previously, Thai workers in these sectors were replaced by new immigrants. In the future, with an increase in the demand for labour in both countries, these sectors would encounter difficulties in finding workers at the level of income they presently offer.

The Thai Government is well aware of the potential decrease in the migrant labour supply from Myanmar, and is looking at formalizing labour importation arrangements with other countries, such as Viet Nam and Bangladesh. However, considering that the industries which will likely be most affected by changes in the migration patterns among Myanmar migrants currently operate under the model of low-wage employment, it is unrealistic to expect that other foreign migrant workers would be willing to come to Thailand through a formal labour migration scheme and accept such wages. Furthermore, with rising production and labour costs in Thailand, the labour-intensive, low-technology manufacturing sector has, in general, lost the comparative advantage it previously held. However, importing workers from other countries may work for some job sectors in mainly non-border provinces, where the level of income is mostly above the minimum wage.

If the Government plans to accept migrant workers from other countries, the system would need to be worked out thoroughly, as this, in essence, suggests that Thailand is actually entering a new phase of labourimportation. In order to attract a constant stream of migrants with a low turnover, both the employers in Thailand and the Thai Government should be tasked to maintain the minimum standards that are promised to migrant workers, as these standards are already quite low, even for labour-receiving markets. Besides, historically Thailand has never achieved formally importedworkers in the millions – what is currently dominating the migrant workers management system is an effort to recognize who came to Thailand through unregulated channels, and the recruitment of regular workers through the official channel remains limited.[1] The regular recruitment system will thus be revisited and enhanced as Thailand moves away from its dependency on Myanmar migrant workers.

Another option is to follow the route of countries such as Japan and the Republic of Korea which have managed to re-strategize by investing in automation and technology. This option would require a thorough structural change towards higher value-added production by investing in research and development, educational reform and skills development. In theory, with an inclusive growth plan, both Thai and foreign workers would be able to develop the skills required by industries, thus reducing the current skills mismatch in Thailand. However, the question remains as to how feasible these moves will be for the job sectors that currently underpay migrants, both in terms of the relevance of technology and also froma cost–performance perspective.

For these reasons, it would be difficult to think of any other practical options for these employment sectors than raising the levels of income for their migrant workers so that they can retain a sufficient migrant labour force necessary for operating their businesses. How quickly they will be forced to raise the level of wages will really depend on the increase in the demand for labour in other parts of Thailand and Myanmar, and how the market wage levels for migrants will increase. These are all important factors that individual business owners, industry associations and the Royal Thai Government must consider in facing and managing the changes that are sure to come.

Footnote

[1]   Thai Department of Employment, Ministry of Labour, in: IOM Migrant Information Note (MIN), Issue #21 (September 2013).

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