A study on migrant workers of Singapore, Mar-Sep 2021

JOB LONGEVITY
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Executive Summary

This study looks at the work history of work permit (WP) holders from Bangladesh and India (NOTE: almost all of the Indian respondents are from Tamil Nadu). Respondents serve in the construction, marine and process sectors. We chose to focus on these sectors and nationalities as these are the workers that TWC2 typically works with. The study was based on an online survey distributed through various channels, in three languages: English, Bengali and Tamil.

The main findings of the study are as follows:

• Most of the respondents in the survey have been working in Singapore between 6 to 15 years. Compared to the previous survey (2016), respondents in this survey have been working in Singapore for longer than those surveyed in 2016.

• Less than one-third of the respondents are currently working in their first job. This suggests that most respondents have opportunities to switch companies. In contrast, the 2016 survey found that two-third of respondents were in their first job since they first came to Singapore.

• Overall, more than 40% of respondents have worked for three or more companies, and about two-thirds have worked for two or more companies. In general, Bangladeshi respondents have worked at more companies than Indian respondents, i.e. they changed companies more frequently. The mean average tenure for all respondents was 4.2 years per company.

• Bangladeshi respondents reported a lower mean starting basic salary when compared to Indian respondents. This may be the reason why Bangladeshi workers tended to change jobs more frequently – they hope to get a pay raise with a new employer. Bangladeshi respondents also reported a lower mean current basic salary compared to their peers from India.

• The starting basic salary of respondents adjusted for CPI has decreased gradually from the cohort who arrived in 2000 to the most recent cohort. In contrast, the construction sector GDP and productivity have increased in the same time period.
Executive Summary

• The mean basic salary increment for Bangladeshi and Indian respondents in the 2021 survey is slightly higher than in the 2016 survey. We calculated the basic salary increment as the difference between the salary when they first arrived in Singapore and the current basic salary. There is no significant difference between Bangladeshi and Indian respondents in their mean basic salary increment.

• In general, respondents who have worked in Singapore longer reported a higher current basic salary, which should be expected, and respondents who have worked for more companies reported a higher basic salary increment.

• In terms of recruitment fees, Bangladeshi respondents reported higher median recruitment fees at $6000 compared to Indian respondents, who paid a median recruitment fee of $2000. Recruitment fees paid have been rising over the years.

• We defined a worker’s “recovery period” as the recruitment fees that a worker has paid divided by his starting basic monthly salary. With increasing recruitment fees and decreasing starting basic salaries for successive cohorts of workers, the average recovery period has risen from about 6.5 times their monthly basic salary for the 2000-2005 cohort to the current 11 times for the 2016-2020 cohort. The recovery period for Bangladeshi workers is significantly longer than their counterparts from India.

The ensuing sections discuss the motivations for the study, explain the methodology, provide more details on the profile of the respondents, and elaborate on the findings.
Introduction
Introduction

This study aims to provide insights into the work history of foreign workers in Singapore. The focus is on male Indian and Bangladeshi work permit holders (WPHs) in the construction, marine and process (CMP) sectors. These are the workers that TWC2 often works with and this study would enable the organisation to better understand their situation and contextualise the issues that they face. From TWC2’s experiences and interactions with the workers, the CMP sectors are understood to share similarities in salary scales and recruitment fees.

This study will cover primarily the following areas, which are interlinked and have to be studied together:

• The workers’ employment tenure in Singapore and the extent of turnover
• Evolution of their salary during the period of employment in Singapore
• Recruitment fees paid by the workers to come to Singapore

The length of time that the workers are employed in Singapore and their company is an important area to investigate as this is tied to productivity and the workers’ safety and welfare. A high churn rate where workers stay in Singapore only for a short period of time and are quickly replaced by new workers would not be beneficial to the worker, to the company or to Singapore. It takes time for the worker to acclimatise himself to the work environment, to be trained and to learn on the job.

A more experienced worker who has worked in Singapore for some time would be, all things remaining equal, more productive than a newly arrived worker. Crucially, he is also likely to be less prone to injury. Many of the injury cases handled by TWC2 are from workers who are in their first year of employment in Singapore, perhaps because these workers have not adapted to their workplaces and are less familiar with safety protocols.

1 http://twc2.org.sg/2019/02/16/are-foreign-workers-abusing-wic-claims/
Introduction

Companies also incur administrative costs in bringing in new workers. To the worker, the length of time he can work in Singapore is important as he needs to recoup the often significant recruitment fees paid to agents in their home country. He would also want to save sufficient money for a better life and/or to start a business when they return home.

On the subject of salary, the wages of the worker and how it changes over the tenure of his employment has an impact on how quickly the money paid to agents can be recouped. Many of these workers are in debt when they arrive in Singapore, and experience some financial stress. The salary level and how it changes over time also has an impact on the worker’s decision on how long to stay with a company and whether to seek a transfer to another company promising higher pay. One thing to note is that many employers see transfers as something that benefits their business competitors, so many workers end up being repatriated by their current employers when they seek transfers to another company.

There is also the ethics of what constitutes a reasonable wage for these workers and whether their wages rise in tandem with experience, and with inflation.

The discussion of foreign workers’ employment in Singapore is not complete without consideration of recruitment fees. These fees, together with work permit conditions that restrict their ability to change jobs, put WPHs in a weak and even vulnerable position relative to their employers. WPHs are often wary of losing their jobs because of the debts they incurred to agents in their home country for securing a job in Singapore. It is therefore important to know how much these workers pay, and how long it takes for them to recover the fees from their salary.
TIMELINE OF IMPORTANT POLICY CHANGES and EVENTS

1987; Levy is 200 SGD with max WPH of 50% in construction sector (Bal, 2013)

1988; Levy increased to 100 - 430 SGD with max WPH of 80% in construction sector (Bal, 2013). Introduction of man-year entitlements (MOM)

1988; Levy increased to 160 - 470 SGD with max WPH of 87.5% in construction sector (Bal, 2013)

2006; start of the construction of MBS and RWS

2008; financial crisis (great recession)

2009; gradual dip in foreign workforce numbers

2009; levy differential for workers with 4 - 6 years experience and CoreTrade or SEC(K)

2010; Levy increased to 200 - 450 SGD with max WPH of 87.5% in construction sector.

2011; Levy increased to 200 - 450 SGD with max WPH of 87.5% in construction sector.

2012; Levy increased to 200 - 450 SGD with max WPH of 87.5% in construction sector.

2013; Levy increased to 300 - 950 SGD with max WPH of 87.5% in construction sector (Bal, 2013, MOF Budget)

2013; Levy increased to 300 - 950 SGD with max WPH of 87.5% in construction sector.

2015; some flexibility given to construction and process WPH to change employers

2015; some flexibility given to construction and process WPH to change employers

2016; Levy increased to 10% of R1

2017; Levy increased to 10% of R1

2017; Levy increased to 10% of R1

2017; Levy increased to 10% of R1

2018; Maximum employment period of 10 (R1) and 18 (R2) years increased to 14 and 26 respectively.

2018; Maximum employment period of 10 (R1) and 18 (R2) years increased to 14 and 26 respectively.
Methodology
Methodology

The data analysed in this study was collected through a Google Forms survey shared with foreign workers via TWC2’s Tamil and Bengali Facebook pages as well as personal contacts. The survey was made available in three languages: English, Tamil and Bengali. It was disseminated from the last week of April 2021 and was closed by the end of the first week of May 2021.

There were 15 questions in the survey and the entire survey could be completed in 10 minutes. Please refer to Appendix for the questionnaire. The number of questions was deliberately kept small to encourage participation in the survey. It was also hoped that a shorter and concise survey would result in more accurate responses. For the same reason, all the questions were close-ended, i.e. they were all multiple choice questions. This, however, meant that some precision had to be traded off. For example, respondents had to select one of the salary ranges provided instead of giving their exact salary.

To incentivise participation and as a gesture of appreciation, the respondents were entered into a lucky draw where 400 of them were selected for a $10 phone top-up.

The first five questions of the survey sought to understand the personal profile of the respondents and the subsequent 10 questions sought to understand their employment experiences. We received a total of 589 responses to the survey. We found that some of the responses shared the same phone numbers. Some of these entries were identical, while some were different. We do not know why the latter happened and to ensure integrity of the answers, we removed these responses as well as any duplicates. This left us with a total of 568 responses. Out of 568 responses, we removed 59 respondents who were either: female, not from Bangladesh or India, non-WPHs, or WPHs not in the CMP sectors. 509 responses remained, all of which were male Indian or Bangladeshi WPHs working in the CMP sectors.
Profile of the Respondents
As stated above, the focus of the study is on WPHs from Bangladesh and India in the CMP sectors. The distribution of the 509 work permit holders by country and sector is tabulated below.

The respondents are predominantly from the construction sector. In order to know whether the sectoral distribution of respondents in our survey reflects the actual percentages in Singapore, we would need to know the actual numbers of Bangladeshi and Indian WPHs in the individual CMP sectors. However, the latest annual statistics on foreign workforce published by MOM shows a combined figure for CMP of 311,000 as at end December 2020. The most recent available figure for the number of construction WPHs reported by MOM was 280,500 as at end 2018. This represented 79% of the combined figure for CMP of 355,700 as at end 2018. Assuming that the sectoral distribution has not changed much between 2018 and 2020, it would appear that the predominance of our respondents in the construction sector squares with the reality on the ground.

There was a similar survey conducted by TWC2 in 2016. The graph below compares the sectoral distribution of our survey with the previous survey.

<table>
<thead>
<tr>
<th>Construction</th>
<th>Marine</th>
<th>Process</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangladesh</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>248 (85%)</td>
<td>34 (12%)</td>
<td>8 (3%)</td>
<td>290 (57%)</td>
</tr>
<tr>
<td>India</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>185 (85%)</td>
<td>29 (13%)</td>
<td>5 (2%)</td>
<td>219 (43%)</td>
</tr>
<tr>
<td></td>
<td>433 (85%)</td>
<td>63 (12%)</td>
<td>13 (3%)</td>
</tr>
</tbody>
</table>


3 http://twc2.org.sg/2019/05/02/foreign-construction-workers-continue-to-reduce-no-improvement-in-productivity/
Profile of the Respondents

Fig. 1. Distribution of respondents by sector

<table>
<thead>
<tr>
<th>Year</th>
<th>Sector</th>
<th>Bangladeshi</th>
<th>Indian</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>Construction</td>
<td>356</td>
<td>44</td>
</tr>
<tr>
<td></td>
<td>Marine</td>
<td>200</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Process</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>Construction</td>
<td>248</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>Marine</td>
<td>185</td>
<td>29</td>
</tr>
<tr>
<td></td>
<td>Process</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
Profile of the Respondents

The graph here shows the nationality distribution for the 2021 and 2016 surveys. The 2021 survey had a more even split between Bangladeshi and Indian respondents in 2021. We do not know whether it reflects the national percentages because MOM does not publish such information. However, empirical observations through TWC2’s communications with other NGOs and some dormitory operators suggest that Bangladeshis and Indians are present in approximately equal numbers. If this is true, then the 2021 results would be a better representation of the migrant worker population.

Of the 219 respondents in 2021 who are Indian nationals, at least 207 are from Tamil Nadu (they responded to the Tamil-language survey). While we have referred to this group of 219 respondents as Indians, the reader should note that our observations and interpretations are most strongly applicable to migrant workers from the state of Tamil Nadu in India.
Profile of the Respondents

We grouped survey respondents into cohorts of five years based on their year of arrival in Singapore. Most of the respondents arrived between 2006 and 2015. In fact, there is a large increase in respondents from the 2006-2010 cohort, compared to the 2001-2005 cohort. One possible explanation is that a lot more workers were brought in for the construction of the integrated resorts which started in 2006.

Seen from another angle, most of the respondents have been working in Singapore for between 6 to 15 years. In comparison, most of the respondents in the 2016 survey had been working in Singapore for between 0 and 10 years. This is a good development in that the workers appear to be working longer in Singapore now. In other words, it appears that there is less “churn” compared to a few years ago. The progressive increase in maximum employment period of WPHs by MOM in recent years could have contributed to the workers working longer in Singapore.

For example, the maximum employment period of R2 workers was increased from 6 to 10 years in 2012, and in 2018, the maximum employment period of R2 workers was increased further to 14 years, and of R1 workers from 18 to 26 years⁴.

The low number of respondents from the 2016-2020 cohort can be attributed to tightened arrivals during the Covid-19 pandemic, as well as the reduction in CMP WPHs from 423,300 as at end-December 2015 to 370,100 as at end-December 2019.

The graphs below show the distribution of respondents by cohort, as well as by their length of employment in Singapore, for the 2021 and 2016 surveys.

⁴ R2 workers are considered basic-skilled while R1 workers are higher skilled.
Profile of the Respondents

Fig. 3. Distribution of respondents by cohort

Max employment period of R1 worker = 10 years

Max employment period of R1 worker = 14 years
Profile of the Respondents

Fig. 4. Distribution of respondents by years in Singapore

- Max employment period of R1 worker = 10 years
- Max employment period of R1 worker = 14 years
Profile of the Respondents

This graph shows the age groups of our respondents, with the majority belonging to the 25-30 and 31-35 age groups. This is similar to the 2016 survey. However, compared to the 2016 survey, we had significantly fewer respondents from the 18-24 age group. In the five years between the 2016 and 2021 surveys, the migrant workers in the 18-24 age group would have aged into the 25-30 age group. In the same period, the reduction in CMP WPH meant that potential migrants aged 18-24 had fewer chances to come to Singapore. The existing workers who already had experience here held a competitive advantage, and inexperienced Bangladeshis and Indians would have found fewer opportunities for a first job here.
Employment Tenure
Employment Tenure

In quantifying the job mobility of the workers, we asked for the total number of companies that the workers have worked at since their first arrival in Singapore. We wish to explain that job mobility in this context straddle both voluntary and involuntary changes in job. While some workers may have voluntarily switched jobs, others may have been forced to look for another employer, for example, when projects are no longer available in their company, which is common in the project-based construction sector. Our data also do not differentiate between those who changed employers in Singapore, and those who managed to find another job and returned to Singapore after being repatriated.

Overall, more than 40% of respondents have worked for three or more companies, and a two-thirds majority have worked for two or more companies (Fig. 6).\(^5\)

\(^5\) Some respondents did not indicate how many companies they have worked for, so the total number of respondents in the graph do not add up to 509. This may also be a feature of other graphs.
Employment Tenure

The earlier the cohort, the more the number of companies that they have worked for. This suggests that workers who have been in Singapore for a longer period of time are likely to have had more opportunities to transfer to other companies over the years (Fig. 7).
Employment Tenure

We also observed that for cohorts 2011-2015 and 2016-2021, a larger proportion of Bangladeshi respondents have worked at 2-4 companies compared to Indian respondents. This may be because Bangladeshi respondents have a lower mean starting salary compared to their Indian peers (Fig. 15), and so could have changed jobs more frequently to get salary increments.

Fig. 8. Distribution of no. of companies worked for – segmented by country and cohort
Employment Tenure

From data collected on the number of companies the respondents have worked for, we calculated the proportion of respondents who are currently working in their first job since they first came to Singapore. Our study has found that less than one-third of the respondents are currently working in their first job, suggesting that most respondents have opportunities to switch to other companies. In contrast, a similar study done by TWC2 in 2016 found that two-thirds of respondents were in their first job since they first came to Singapore (Fig. 9). This difference is not merely a result of the pandemic because only about 25% of respondents not working in their first job changed their job in the past year (Fig 10).

A possible explanation can be found in a policy change in 2015, where WPHs in the construction sector were allowed to change employers at the end of their work permit term, if they were not able to come to mutual agreement with their employer on the renewal of their work permit. In 2017, the same flexibility was given to WPHs in the process sector. The implications of this policy can be seen from how in the second half of 2020, 20% of workers with expiring work permits were transferred to new employers\(^6\). The introduction of this policy can hence possibly account for the difference between the findings in 2016 and 2021.

\(^6\) http://twc2.org.sg/2021/04/06/nearly-8000-foreign-construction-workers-had-permits-cancelled-close-to-expiry-date/
Employment Tenure

Fig. 9. Distribution of respondents in first job, segmented by country

2016

2021

Frequency

FALSE | TRUE
Respondent in first job

Bangladeshi | Indian

2016

Bangladeshi | Indian

2021

Bangladeshi | Indian
Employment Tenure

Fig. 10. Current tenure of people NOT in first job

Only about 25% of respondents not in their first jobs have been in their current jobs for less than a year. This suggests that job change in the pandemic was not the sole reason for the distribution of respondents in their first job (Fig. 9).
Employment Tenure

When analysed by cohort, the same trend (i.e. that more have changed jobs than those who have not) is observed except for Indian respondents in the most recent cohort (Fig. 11). Since they arrived most recently, it is reasonable that many have remained in their first job since they are more unlikely to have been presented with opportunities to switch companies compared to those who have been here for a longer time. This also corresponds with the earlier observation that fewer Indian respondents than Bangladeshi respondents have switched companies.

Fig. 11. Distribution of respondents in first job, segmented by country and cohort
Employment Tenure

Based on the year that a worker first arrived in Singapore, we calculated the average employment tenure for each respondent by dividing a worker’s total employment tenure in Singapore by the number of companies he has worked at. Across all respondents, the mean average tenure was 4.2 years per company a worker has worked at. The mean average tenure is shortest for the most recent cohorts and longest for the earliest cohorts. A point to note is the distribution of respondents in the 2001-2005 cohort – there is a rather large disparity between the two nationalities which could be because there were only 5 Bangladeshi respondents in that cohort.

Fig. 12. Distribution of average tenure, segmented by country and cohort
In a crossplot of the number of companies a worker has worked for against the total number of years he has spent in Singapore, the mean average tenure can be plotted as a straight line. Please see the graphs below. Since most data points lie below this line, the mean average tenure is mostly an underestimate, i.e. most people work at a job for longer than 4.2 years. This mean average tenure is shorter than most respondents’ average tenure due to a group of Bangladeshi respondents who worked in many companies during their short stay in Singapore, represented in the crossplot by the data points lying above the mean average tenure line. This corresponds to our earlier observation that more Bangladeshi respondents have worked at 3 or 4 different jobs compared to Indian respondents.

**Fig. 13. Comparison of mean average tenure to actual data, segmented by country and cohort**
Employment Tenure

Of the respondents still in their first job, there is a fairly even split between those who have either worked for longer (56%) or shorter (44%) than the mean average tenure (Fig. 14). This would suggest, in addition to most respondents having some degree of job mobility, that those who are in their first job have some job stability comparable to other respondents. In other words, foreign workers who are in their first job in Singapore are not being held in the job for an excessive period of time, nor are they leaving their first job after only a very short period of time. The main assumption is that reduced migrant inflows during the pandemic have not significantly affected this distribution. It is possible that if migrant inflows were normal, we may find a very large proportion below the mean average tenure.

Fig. 14. Tenure of the respondents in first job, comparison to mean average tenure of 4.2 years
Salary
Salary

The economic opportunities in Singapore constitute one of the motivating factors for many foreign workers arriving here. By extension, foreign workers’ wages and wage growth constitute an important area of investigation. The results of our survey show that Bangladeshi respondents reported a lower mean starting basic salary when compared to Indian respondents (Fig. 15). Bangladeshi respondents also reported a lower mean current basic salary compared to Indian respondents (Fig. 16).

![Fig. 15. Distribution of starting salary, segmented by country](image1)

![Fig. 16. Distribution of current salary, segmented by country](image2)
The starting basic salary of each cohort adjusted for CPI has decreased gradually from 2000 to the present. In contrast, the construction sector GDP and productivity have increased in the same time period (Fig. 17). This is a worrying trend, because it essentially suggests that the workers’ salaries do not increase in accordance with their productivity.

**Fig. 17. Evolution of starting basic salary against GDP and productivity in construction sector**

Salary

We defined the basic salary increment as the difference between the starting and the current basic salary. The mean basic salary increment for Bangladeshi and Indian respondents in the 2021 survey is slightly higher than in the 2016 survey. This can be attributed to pay increments earned by a migrant worker population that has more work experience in general, keeping in mind that new migrant workers are having fewer opportunities to find a first job in Singapore. The difference between the mean basic salary increment of the different nationalities is not statistically significant i.e. below 95% confidence level.

**Fig. 18. Mean basic salary increments, segmented by country, in 2016 and 2021**
Respondents who have worked for more companies reported higher mean basic salary increments. In the previous section, we observed that Bangladeshi respondents changed jobs more frequently than the Indian respondents. Connecting it with the wage data, this suggests that Bangladeshi respondents tend to change jobs more frequently in order to win salary increments from their lower base salary. In contrast, we observed that Indian respondents start at a higher mean basic salary, change jobs less frequently on average, stay working in Singapore for longer on average, and have a higher mean current salary.
Salary

Current basic salary increases with the amount of time spent in Singapore (Fig. 20).

An additional observation from Fig. 20 and Fig. 21 show that there are some workers who report surprisingly low wages and no increments even after working for 20 years in Singapore.
Salary

Basic salary increments are also directly proportionate to the length of time spent in Singapore (Fig. 21). Respondents’ salary increments increased the fastest for those who have worked in Singapore between 0 - 15 years. In contrast, those who have worked beyond 15 years have slower increases in salary increments.

Fig. 21. Distribution of basic salary increment, segmented by cohort
Salary

Respondents’ average tenure is positively correlated with their reported basic salary increment. However, based on the dispersion of the data, this relationship is not particularly strong. The positive gradient of the trendline, however, reveals that the total tenure is a more important factor than the number of companies worked for.

Fig. 22. Distribution of basic salary increment, plotted against average tenure (in years)
Higher starting basic salaries are correlated with lower basic salary increments. However, this is not a principal factor that explains wage growth, because it only explains for a $100 - 200 difference in basic salary increment, and not the wider distribution of increments up to $650.

To sum up, work experience in Singapore has the highest correlation with higher wages. Changing employers is a supporting factor to wage growth. More recent cohorts are being paid less in real wages than the cohorts who arrived in Singapore earlier.
Recruitment Fees
Recruitment Fees

Comparing the median recruitment fees paid by the respondents by nationality, Bangladeshi respondents reported a higher median recruitment fees of $6000 compared to Indian respondents, who paid a median recruitment fee of $2000 (Fig. 24).

Fig. 24. Distribution of recruitment fees, segmented by country
Recruitment Fees

To compare recruitment fees paid by the workers over time, we analysed the data collected from this survey alongside the results collected in 2012 from a TWC2 study in 2012\(^8\) and those collected from another TWC2 study in 2016\(^9\). Each survey found that recruitment fees have been rising gradually across time from 2000 to 2020 (Fig. 25).

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Recruitment Fees

We also sought to calculate the duration that the workers would need to recover the amount spent on their recruitment fees. A worker’s “recovery period” is hence defined as the recruitment fee that a worker has paid divided by his starting basic monthly salary. Based on the recruitment fees and starting basic salaries reported, Bangladeshi respondents have a higher median recovery period compared to Indian respondents (Fig. 26). The earlier section on salary found that Bangladeshi respondents earned relatively less. Yet, they paid higher recruitment fees than Indian workers. All these paint a picture of a financial journey that is increasingly difficult for the workers, especially for the more recent cohorts of Bangladeshi workers.

Fig. 26. Distribution of recovery period, segmented by country
Recruitment Fees

Incidentally, Bangladeshi respondents were twice as likely as Indian respondents to encounter salary or injury issues (Fig. 27). While we do not know the specifics of these cases, this would certainly add another element of financial stress.

Fig. 27. Distribution of respondents reporting salary or injury issues, segmented by country

![Bar chart showing frequency of salary or injury issues by country]

- **Bangladeshi**: 33
- **Indian**: 16
Recruitment Fees

Lastly, we calculated the average recovery periods for different cohorts of workers arriving through the years. With increasing recruitment fees and decreasing starting basic salaries over time, the average recovery period for successive cohorts has steadily risen from about 6.5x their monthly basic salary for the 2000-2005 cohort to the current 11x of their monthly basic salary for the 2016-2020 cohort.

Fig. 28. Evolution of recovery period over time
Conclusion
Conclusion

This study has uncovered a couple of positive developments but also several negative ones concerning the employment of Bangladeshi and Indian WPH in the CMP sectors. One positive development is that the workers appear to experience higher job mobility now than several years ago, as seen from the significant increase in the proportion of respondents who are not in their current job, compared to the proportion from a similar study conducted in 2016. We have interpreted this as a positive development but it would be useful to investigate the various circumstances under which the workers have changed jobs, for example, whether the change in employment was voluntary, whether it was borne out of necessity because no more work was available at their current company, and so on.

Another positive development is that the workers are staying longer in Singapore, which is good for the individual as well as CMP sectors.

There have been policy changes made by MOM in recent years to provide a little more flexibility for workers to change employers and increase the maximum period that WPHs can work in Singapore. These policy changes may have contributed to these developments. When thinking about future policy it is also important to consider the implications associated with an aging migrant population especially the need for comprehensive healthcare plans.

On negative developments, one is that the starting basic salary of successive cohorts of the workers adjusted for CPI has been decreasing, despite the increase in construction sector GDP and productivity over the same period. Increases in levy rates could have had a negative impact on the wages of the workers but more research would need to be done. We may also need to look at the total wages of the workers, which may tell a different story.
Conclusion

On a related point, the starting monthly salary of Bangladeshi workers was found to be generally lower than that of Indian workers. This is likely the reason why the Bangladeshi respondents tended to change jobs more frequently. It may be useful to investigate the disparity between the starting salaries of Bangladeshi and Indian workers.

Another negative development is the increase in recruitment fees paid by successive cohorts of the workers. This finding corroborated the TWC2 studies done in 2012 and 2016, and showed that the worrying trend appears to be continuing. The recovery period - which we define as the recruitment fees divided by the basic starting monthly salary - has thus been increasing for workers who arrived more recently. Bangladeshi workers faced a double whammy - their mean starting monthly salary is lower than their peers from India, and they paid significantly higher recruitment fees to come to Singapore.

One likely reason why recruitment fees are much higher now is that there are fewer jobs in Singapore, and existing workers in Singapore are preferred by employers to new workers. So Bangladeshi and Indian migrants wishing to find new work in Singapore are being charged higher recruitment fees. One thing that should be worth exploring, is whether there is profiteering involved - exploitation of the situation by employment agents - or perhaps the extent of it.

The higher recruitment fees will inevitably affect the well-being of the workers. Arriving in Singapore heavily indebted, they will invariably face higher financial stress and become more vulnerable to the demands of the employers. A key theme that is presented is that when compared to Indian workers, Bangladeshi workers are the most vulnerable in terms of their conditions and the possibility of problems they may face.
Appendix 1: English Questionnaire

Questionnaire description:
We would like to know more about your job experience in Singapore. The survey won’t capture your name or contact address, so your information is safe with us. There are 15 questions and it will take about 5 minutes to fill. All questions are mandatory. Please answer all and click submit.

Section 1: About you

1. What is your gender
   - Male
   - Female
   - Prefer not to say

2. How old are you?
   - 24 or younger
   - 25-30
   - 31-35
   - 36-40
   - 41 or older

3. Where are you from?
   - Bangladesh
   - Cambodia
   - China
   - India
   - Indonesia
   - Malaysia
   - Myanmar
   - Nepal
   - Philippines
   - Sri Lanka
   - Thailand
   - Vietnam
   - Other

4. Which pass are you holding?
   - Work Permit
   - S Pass
   - Special Pass
   - EP
   - Other

5. What sector are you working in?
   - Cleaning
   - Construction
   - Landscaping
Appendix 1: English Questionnaire

O Manufacturing  O Marine  O Process
O Services  O Others

Section 2: About your employment experiences

6. When did you come to Singapore?

7. How much did you pay your first agent to come to Singapore?

O I did not pay any agent  O Less than $1000
O Between $1000 to $2999  O Between $3000 to $4999
O Between $5000 to $6999  O Between $7000 to $9999
O $10000 or above

8. What was your monthly basic salary (in Singapore currency) for your first job in Singapore? (Basic salary excludes overtime pay and bonuses)

O Less than $500  O $500 to $599  O $600 to $699
O $700 to $799  O $800 to $899  O $900 to $999
O $1000 to $1199  O $1200 to $1499  O $1500 to $1999
O $2000 to $2999  O $3000 or above

9. Since coming to Singapore, how many companies have you worked for?

O 1  O 2  O 3  O 4
O 5  O 6 or more
Appendix 1: English Questionnaire

10. How much time have you spent at home, on leave, or between jobs?
   - Less than 6 months
   - 6-11 months
   - 1 year to 23 months
   - 2 years to 35 months
   - 3 years or more

11. How long have you been in your current company? (select the closest answer)
   - 6 months
   - 1 year
   - 1 year and 6 months
   - 2 years
   - 2 years and 6 months
   - 3 years
   - 3 years and 6 months
   - 4 years
   - 4 years and 6 months

12. What is your monthly basic salary (in Singapore currency) now - in your current company? (Basic salary excludes overtime pay and bonuses)
   - Less than $500
   - $500 to $599
   - $600 to $699
   - $700 to $799
   - $800 to $899
   - $900 to $999
   - $1000 to $1199
   - $1200 to $1499
   - $1500 to $1999
   - $2000 to $2999
   - $3000 or above

13. Have you gotten a pay raise in your current company?
   - Yes
   - No

14. Are you consistently paid by your current employer?
   - Yes
   - No

15. Have you ever filed a salary or injury claim in the past?
   - Yes
   - No
Appendix 2: Tamil Questionnaire

Questionnaire description:

கின்றதற்கு இல்லாத ஒருவர் மற்றும் மக்கள் உங்கள் வாழ்க்கையில் அதிகம் விளையாடிக்கொள்ளது. இதற்கான கணிக்கைகள் உள்ளன. இவை வேறுபாடுகளுடன் பரிசெல்லும் போக்கில் விளையாடிக்கொள்ளது. உங்கள் வாழ்க்கையில் பதிலையும் போது வடிவத்தை விளக்கும் விளக்கில் பார்க்கும். உங்கள் தகவல்கள் பாதுகாப்பாக நம் கணிக்கைகளை பெருக்குவது வேளாண்மை. உங்கள் வாழ்க்கையை விளக்கும், அதற்கான 15 திசைகள் உள்ளன. அந்த திசைகள் விளக்கும் காரணம் 5 திசைகள் பெருக்கும். அதன் நூற்றுக்கும் விளக்கில் பாதுகாப்பாக உள்ளன. உங்கள் வாழ்க்கையை விளக்கும், மற்றும் விளக்கும் தகவல்கள் பலவற்றுடன் "என்று பிரித்துக்கொள்ளும்" கூறும்வாக திசைகள் பகுதிகளும்.

* விளக்கமளித்த திசைகள்

Section 1: About you

1. உங்கள் பாதுகாப்பாக
   0 அல்லது 0 பாதுகாப்பாக
   0 பாதுகாப்பு விளையாடுவதற்கான

2. உங்கள் வயது
   0 24 அல்லது அதற்கு குறைவு
   0 25-30
   0 31-35
   0 36-40
   0 41 அல்லது அதற்கு குறைவு

3. உங்கள் எந்த நாட்டுப் பெண்கள் என்னவோ? 0 பெண்பெண்களோ 0 தமிழ்பெண்களோ
### Appendix 2: Tamil Questionnaire

#### Section 1: About your personal information

| 0 இல்லை | 0 ஐத்தியாயம் | 0 ஐத்தியாயம் நிர்ணயம் |
| 0 மேல்விளக்கம் | 0 மேல்விளக்கம் | 0 மேல்விளக்கம் |
| 0 பிரிவுப் போர்டைக்கம் | 0 பிரிவுப் போர்டைக்கம் | 0 பிரிவுப் போர்டைக்கம் |
| 0 கையாண்டுகள் | 0 கையாண்டுகள் | 0 கையாண்டுகள் |
| 0 Other | 0 Other | 0 Other |

4. என்று மீம்பான பண்டை அடையாள அடையாள அறுங்கள்? |

| 0 வளைந்த பருப்பில் | 0 வளைந்த பருப்பில் | 0 வளைந்த பருப்பில் |
| 0 ஐ. பி (EP) | 0 Other | 0 Other |

5. என்று சாதியின் அடையாள பண்டை பிரிவில் சாதியின் அடையாள பிரிவுகள்? |

| 0 கட்டப்பட்டுகள் | 0 கட்டப்பட்டுகள் | 0 கட்டப்பட்டுகள் |

#### Section 2: About your employment experiences

6. என்று வடிவாக்க மூக்கக விசார்பாளர் வடிவாக்க மூக்கக? |

| 0 வடிவாக்கம் | 0 வடிவாக்கம் | 0 வடிவாக்கம் |
| 0 கையாண்டுகள் | 0 கையாண்டுகள் | 0 கையாண்டுகள் |
| 0 ஒன்றர் கையாண்டுகள் | 0 ஒன்றர் கையாண்டுகள் | 0 ஒன்றர் கையாண்டுகள் |

7. விசார்பாளர் வடிவாக்க மூக்கக விசார்பாளர் வடிவாக்க மூக்கக விசார்பாளர் வடிவாக்க மூக்கக? |

| 0 வடிவாக்க வடிவாக்கம் | 0 வடிவாக்க வடிவாக்கம் | 0 வடிவாக்க வடிவாக்கம் |
| 0 கையாண்டுகள் | 0 கையாண்டுகள் | 0 கையாண்டுகள் |
| 0 1000 வடிவாக்ககள் | 0 1000 வடிவாக்ககள் | 0 1000 வடிவாக்ககள் |
Appendix 2: Tamil Questionnaire

8. கீழ்கட்டளையில் எழ்கை மதி தமிழ்ப்பில் அமையச்செய்யப்பட்டவை, தொகுதி எண்கள் எத்தைன்? (தொடர்புகள் மற்றும் தமிழில் வேட்டுதல்)

9. சிற்றுயர் வழிகாட்டியானது தொகுதி எண்கள் எத்தைனோ? (தமிழில் வேட்டுதல்)

10. விளக்கம் அவ்வ்வாறையாகவும் பல்லோ தமிழ்ப்பில் எழுத்துகள் எத்தைனோ? (தமிழில் வேட்டுதல்)
## Appendix 2: Tamil Questionnaire

<table>
<thead>
<tr>
<th>No.</th>
<th>Option 1</th>
<th>Option 2</th>
<th>Option 3</th>
<th>Option 4</th>
<th>Option 5</th>
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<tr>
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<td>தேர்ச்சியார்</td>
<td>அனைந்து போக்கள்</td>
<td>அவையில் சீனல் மாதங்களும்</td>
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<td>2.</td>
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<td>3.</td>
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<td>8.</td>
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<td>வடங்களும்</td>
<td>வடங்களும்</td>
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<td>9.</td>
<td>வடங்களும்</td>
<td>வடங்களும்</td>
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<td>10.</td>
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<td>11.</td>
<td>வடங்களும்</td>
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<td>12.</td>
<td>வடங்களும்</td>
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<td>வடங்களும்</td>
<td></td>
</tr>
</tbody>
</table>

### 12. இப்பட்டுமன்றம் தேர்ச்சியார் அழுத்தார் வரையும் மாதங்கள் கூடமையும்? (உதாரணம் தெய்க்குறிக்கல்)

<table>
<thead>
<tr>
<th>மாதங்கள்</th>
<th>மாதங்கள்</th>
</tr>
</thead>
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<td>0600 கோடி</td>
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<tr>
<td>0700 கோடி</td>
<td>0800 கோடி</td>
</tr>
<tr>
<td>0900 கோடி</td>
<td>1000 கோடி</td>
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<tr>
<td>1200 கோடி</td>
<td>1499 கோடி</td>
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<tr>
<td>1500 கோடி</td>
<td>1999 கோடி</td>
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<tr>
<td>2000 கோடி</td>
<td>2999 கோடி</td>
</tr>
<tr>
<td>3000 கோடி</td>
<td>அன்னைதேறு ஓரியாள்</td>
</tr>
</tbody>
</table>
Appendix 2: Tamil Questionnaire

13. இப்பட்டார்பால் என்னைச் செய்துவில் இந்துமுறைத்தியல் போற்றுக்கொள்லது தெய்வத்தில் குருவுக்கு வசதி விளக்குக்காணகின்றா?  
0 ஆமாம் 0 இல்லாமை

14. தருமானத்தை மீண்டும் ம் கந்திருக்கினும் நூற்றற்றிட் தூங்கமும் கதவுக்கு வளிக்கு கூர்கின்றா?  
0 ஆமாம் 0 இல்லாமை

15. கார்த்திகை பெயர் பெயர்ப்பை கூர்கின்ற குருவுக்கு வணங்கமும் வல்லதுபோல் கார்த்திகை கூர்கின்ற குருவுக்கு வணங்குகின்றகா?  
0 ஆமாம் 0 இல்லாமை
Appendix 3: Bengali Questionnaire

Questionnaire description:

সিঙ্গাপুরে আপনার কাজের অভিজ্ঞতার সম্প্রসারণ আমরা আরো জানতে চাই
এই সার্বিক করলে আপনার নাম বা যোগাযোগের ঠিকানা
প্রকাশ পাবে না, তাই আপনার সব খবর আমাদের কাছে
সুরক্ষিত।

*প্রয়োজন

প্রথম প্রশ্নটি আপনি এড়িয়ে যেতে পারেন
যে কোন একটি বেছে নিন

Section 1: About you

1. আপনার লিঙ্গ কি?
0 পুরুষ (Male) 0 স্ত্রীলিঙ্গ (Female)

0 জানা চান না (Prefer Not to Say)

2. আপনার বয়স কত? যে কোন একটি বেছে নিন।
0 ২৪ বছর বা তার চেয়ে কম
0 ২৫-৩০ 0 ৩১-৩৫ 0 ৩৬-৪০
0 ৪১ বছর বা তার বেশি

3. আপনার দেশ কোথায়? যে কোন একটি বেছে নিন
0 বাংলাদেশ 0 কাম্বোডিয়া 0 চীন 0 ভারত
0 ইন্দোনেশিয়া 0 মালয়শিয়া 0 মিয়ানমার
0 নেপাল 0 ফিলিপাইন 0 শ্রীলঙ্কা
0 থাইল্যান্ড 0 ভিয়েতনাম 0 অন্যান্য
Appendix 3: Bengali Questionnaire

4. আপনি কোন পাসের ধারক, যে কোন একটি বেছে নিন
   0 ওয়াকেকার পারমিট 0 এস পাস 0 স্পেশাল পাস
   0 ইপি 0 অন্যান্য

5. আপনি কোন বিভাগে কাজ করেন? যে কোন একটি বেছে নিন
   0 ক্লিনিং (Cleaning) 0 কনস্ট্রাকশন (Construction)
   0 ল্যান্ডস্কেপিং (Lanscaping)
   0 ম্যানুফ্যাকচারিং (Manufacturing)
   0 মেরিন (Marine) 0 সার্ভিস (Service)
   0 প্রেসেপ (Process) 0 অন্যান্য

Section 2: About your employment experiences

6. আপনি কবে প্রথম এসেছেন সিঙ্গাপুরে? যে কোন একটি বেছে নিন

7. সিঙ্গাপুরে আসার জন্যে আপনি আপনার প্রথম এজেন্টকে কত টাকা দিয়েছিলেন যে কোন একটা বেছে নিন
   0 আমি কোন টাকা দিইনি এজেন্টকে
   0 ১০০০$ এর কম 0 ১০০০-২৯৯৯$
   0 ৩০০০-৪৯৯৯$ 0 ৫০০০-৬৯৯৯$
   0 ৭০০০-৯৯৯৯$ 0 ১০,০০০$ এর বেশি
Appendix 3: Bengali Questionnaire

8. সিঙ্গাপুরে প্রথম কাজ আপনার বেসিক মাসিক বেতন (সিঙ্গাপুরের টাকার অংকে) কত ছিল? (ওভারটাইম আর বোনাস বাদ দিয়ে বেসিক বেতন) যে কোন একটা বেছে নিন

0 ৫০০ থেকে ৫৯৯ 0 ৬০০-৬৯৯
0 ৭০০-৭৯৯ 0 ৮০০-৮৯৯ 0 ৯০০-৯৯৯
0 ১০০০-১১৯৯ 0 ১২০০-১৪৯৯ 0 ১৫০০-১৯৯৯
0 ২০০০-২৯৯৯ 0 ৩০০০ এর বেশি

9. সিঙ্গাপুরে আসার পর থেকে আপনি কয়টি কোম্পানীতে কাজ করেছেন? যে কোন একটি বেছে নিন

0 ১ 0 ২ 0 ৩ 0 ৪
0 ৫ 0 ৬ এর বেশি

10. আপনি বাড়ীতে ছুটিতে অথবা দুইটি কাজের মাঝে কত সময় কাটিয়েছেন? যে কোন একটি বেছে নিন

0 ৬ মাসের কম 0 ৬-১১ মাস
0 ১বছর-২৩ মাস 0 ২বছর-৩৫ মাস
0 ৩বছরের বেশি

11. আপনি আপনার বর্তমান কোম্পানীতে কতদিন কাজ করেছেন? (নিকটতম উন্নীতি বেছে নিন)

0 ৬ মাস 0 ১ বছর 0 ১ বছর ৬ মাস
0 ২ বছর 0 ২ বছর ৬ মাস 0 ৩ বছর
0 ৩ বছর ৬ মাস 0 ৪ বছর 0 ৪ বছর ৬ মাস
0 ৫ বছর 0 অন্যান্য
12. বর্তমান কোম্পানীতে আপনার বেসিক মাসিক বেতন (সিঙ্গাপুরের টাকার অংক) কত? (বেসিক বেতন মানে ওভার

0 ৫০০$ এর কম 0 ৫০০-৫৯৯$
0 ৬০০-৬৯৯$
0 ৭০০-৭৯৯$
0 ৮০০-৮৯৯$
0 ৯০০-৯৯৯$
0 ১০০০-১১৯৯$
0 ১২০০-১৪৯৯$
0 ১৫০০-১৯৯৯$
0 ২০০০-২৯৯৯$
0 ৩০০০$ এর বেশি

13. বর্তমান কোম্পানীতে কি কখনো আপনার বেতন বেড়েছে? যে কোন একটি বেছে নিন

0 হ্যাঁ 0 না

14. আপনার বর্তমান নিয়োগকর্তা আপনাকে নিয়মিত বেতন দেন? যে কোন একটি বেছে নিন

0 হ্যাঁ 0 না

15. অতীতে কখনো কি আপনি বেতন বা কোন আঘাতের দায়িত্ব (injury claim) করেছেন? যে কোন একটি বেছে নিন

0 হ্যাঁ 0 না