EMPLOYMENT SITUATION IN MANUFACTURING INDUSTRY IN ASEAN* : A FEW ISSUES

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ABSTRACT

For an increasing number of developing countries, employment is emerging as a more serious problem than the much more widely discussed question of inadequacy of food supplies. Except in a very few countries, the expansion of manufacturing employment has had only a marginal impact on total employment. Though growth in ASEAN countries has been buoyant, unemployment and underemployment remain severe problems. This paper attempts to discuss the employment situation in the manufacturing industry as it exists in the ASEAN. Two sets of conclusions appear to emerge: the set of incentives provided to the industrial sector has favoured the adoption of capital intensive technology; and, movements away from the narrow path of import substitution industrialisation and towards the export sector have led to development of more labour intensive industries with a favourable impact on employment generation.

INTRODUCTION

Till recently, but especially during the fifties and early sixties, the process of industrialisation was identified by most developing countries as a prerequisite for their economic development and growth, and as an essential process in the restructuring of their economies – more often than not, heavily dependent on agricultural activities and on imports of manufactured goods. Although the strategy of import substitution initially adopted by most of these countries was successful in achieving rapid industrial growth, with a marked bias in favour of capital intensive large scale industries, there was little expansion in the demand for labour, and the strategy was unable to solve the pressing problem of unemployment and underemployment.

*Due to the fact that Brunei has recently entered in the ASEAN, only 5 ASEAN countries: Indonesia, Malaysia, Philippines, Singapore and Thailand are referred to in this paper.

Until the end of 1960s, growth of output was seen as the principal objective of economic development, with the benefits assumed to be automatically trickling down to the poor. Employment problem, on the other hand, was interpreted in terms of transferring population from the labour surplus rural sector to the urban areas where they were hoped to be absorbed in the industrial sector. However, mainly because of its lack of impact on reducing poverty levels, there has since been a fundamental change in emphasis. Employment generation is now given enhanced priority in the scale of economic objectives, and unemployment is treated as one of the basic symptoms of a country's failure to achieve "development". It, therefore, follows that with employment generation as one of the major goals of economic development, the industrial strategy has started giving considerable weight to the criteria of employment.

BASIC FEATURES OF MANUFACTURING EMPLOYMENT IN ASEAN

The economic record of industrialisation of the ASEAN countries brings about the important differences in their performance. There have been wide variations not only in the rate of growth of output in the manufacturing sector but also in the growth rate of employment in this sector. Despite the impressive performance of most countries in achieving high rate of growth of manufacturing output, the share of manufacturing sector in total employment with the exception of Singapore still remains low. Also, wide variations exist between the growth of output and the corresponding growth rate of employment in manufacturing industry across boundaries as well as in the same country over different periods of time.

TABLE 1
GROWTH RATE OF MANUFACTURING SECTOR IN
ASEAN COUNTRIES(%)

Country	1960-65	1965-70	1960-70	1970-78
Philippines	3.9	6.1	5.5	6.4
Indonesia	3.4	6.9	5.1	13.2
Singapore	-	-	13.0	9.0
Thailand	11.0	10.7	10.9	11.3
Malaysia	-	-	13.8	12.9

Source : Amjad, R. The Development of Labour-Intensive Industry in ASEAN Countries - An Overview, ILO (1981)

At the outset, 3 amongst the 5 ASEAN countries, i.e. Singapore, Thailand and Malaysia were able to achieve greater than 10% rate of growth of output in the manufacturing sector, both during the period of 1960s and 1970s. Though Indonesia's growth rate was significantly lower in the 1960s, in 1970s it had the highest growth rate among all the 5 countries. As compared to the others, Philippines stands out as a relatively "poor" performer.

TABLE 2
ASEAN EMPLOYMENT IN MANUFACTURING AND AGRICULTURE AS
PERCENTAGE OF TOTAL LABOUR FORCE (1983)

	ASEAN	Indo- nesia	Malay- sia	Philip- pines	Singa- pore	Thai- land
Labour Force						
Total (m)	117	62.3	5.6	20.5	1	26.5
% Manufacturing	13	9	16	10	30	8
% Agriculture and fishing	36	55	37	50	1	72

Source : Based on key indicators of developing member countries of ADB : Asian Development Bank, (1985)

Despite the high growth rate of output achieved in the manufacturing sector, the performance of this sector in total employment was still extremely low. Not only was there a wide divergence in the growth rate of output across countries, but also difference in subperiods for the same country. Employment elasticity (defined as ratio of % of change in employment and the % of change in value added for the same period) also points to this.

TABLE 3
EMPLOYMENT ELASTICITY IN MANUFACTURE IN ASEAN

Country	1960-70		
Philippines	0.45	0.32	(1970-80)
Indonesia	0.68	0.44	(1970-78)
Singapore	0.36	0.69	(1970-79)
Thailand	0.27	0.97	(1970-79)
Malaysia	0.30	0.65	(1970-75)

Some of the factors responsible for this low labour absorption in the manufacture sector have been government subsidised use of capital, machinery, raw materials etc. Since the set of incentives provided to the industrial sector has favoured the adoption of capital intensive technology, these have significantly contributed to the unemployment problem especially in the higher population economies of Thailand, Indonesia and Philippines. Later, however, the shift away from the narrow path of import substitution industrialisation towards export sector has led to the development of more labour-intensive industries with favourable impact on employment generation.

EMPLOYMENT EFFECTS OF FOREIGN DIRECT INVESTMENT - THE MULTINATIONAL ENTERPRISES (MNEs)

Beginning in the 1960s, the multinational firms in western industrial countries and Japan had begun relocating their subsidiaries in developing countries for the purpose of manufacturing finished products for sale by the parent company to the home country consumer and to provide components and sub assemblies to parent plants. The major motivating force for this international division of labour was to be found in the cheap labour available in many developing countries.

Throughout all phases of industrialisation, foreign investment has played a vital role in the ASEAN as well. However, to make foreign investment contribute more effectively to their economic development, their initial "open door" policy has recently been turned into a more selective policy. With Singapore as an exception, manufacturing industry in the majority of the ASEAN has accounted for less than 20% of employment - a share which will expand only slowly. The manufacturing sector, especially large scale manufacturing, and also the MNEs can play only a limited role in solving the vast employment problem. However, some of the highly capital intensive branches in which MNEs concentrate, have generated indirect employment effect through backward as well as forward linkage with other points of the local economy. These indirect effects of MNE employment are, however, more complex to conceptualise and more difficult to quantify.

One of the more recent phenomena for the developing countries are the free trade zones (FTZs), which were developed apart from the prospect of export earnings, also as an exceptional potential for employment creation for labour-intensive industries. MNE activities in FTZs are mostly represented by new employment in the developing host countries - takeovers of existing local enterprises being rare. Growing usually from a quantitatively small employment volume in the initial year, the scale effect of the rapid rate of growth of the FTZ activities may be somewhat misleading in judging their importance in the employment generation in the context of the host country as a whole. As a matter of fact, for reasons of market saturation and the number of goods which can be assembled at low unit costs, there are fairly definite limits to a continued expansion of

production and employment at the high initial rates. While the positive impact of labour-intensive export-oriented industries on the reduction of employment cannot be denied, the costs incurred are not inconsiderable either. Apart from substantial losses of revenue due to tax relief, outflow of capital due to repatriation of profit, etc., there exists the possibility not only of relocation of the industries to countries which can offer even cheaper labour, but also of close down altogether due to economic depression in advanced capitalist countries. Abundance of a cheap labour policy has also required a strict disciplinary attitude on labour by the state. FTZ and similar site activities being of small proportion in the total economic context, except in the city state of Singapore, the rapid rate of employment growth in the MNE-based activities found in FTZs has only significantly reduced the high natural unemployment levels of the ASEAN. Also, their activities have provided employment mainly to new categories of workers, i.e. mainly young females. As in all trade-related employment, FTZ employment is much affected by the fluctuation of global economic activities, and thus even in Singapore, such employment in the assembly of radios, televisions, semiconductors have dropped considerably in the last decade.

TABLE 4
POPULATION AND LABOUR FORCE GROWTH RATES

Country	Average Annual Growth of Population (%)			Average Annual Growth of Labour (%)		
	1960-70	1970-80	1980-2000	1960-70	1970-80	1980-2000
Indonesia	2.0	2.3	2.0	1.7	2.1	1.8
Malaysia	2.8	2.4	2.0	2.8	3.0	2.8
Philippines	3.0	2.7	2.3	2.2	2.4	2.7
Singapore	2.4	1.5	1.3	2.8	2.7	1.4
Thailand	3.0	2.5	1.9	2.0	2.9	2.3

Source : Seminar on employment policies and labour market information for workers organisation, ILO, Geneva (1983)

IMPACT OF RECESSION ON EMPLOYMENT IN MANUFACTURING INDUSTRY IN ASEAN

The worldwide recession has affected the total employment position in the ASEAN including that in the manufacturing industry sector. Though Singapore has had less drastic effect, in Malaysia during 1981-83 there has been an absolute decline in employment and output growth has been negative in several subsectors such as textiles, garments, food, beverages, tobacco, industrial chemical and

rubber products. In Philippines employment in the organised manufacturing sector fell by 3.9% in 1980 compared to 5% increase in 1979. In Singapore the growth in manufacturing employment declined sharply in 1981 and 1982 and the continued decline in unemployment in the country has been mainly a reflection of the significant number of foreign workers who were repatriated when demand for labour fell. However, it needs to be emphasised that unemployment figures understate the impact of recession on employment.

PARTICIPATION OF WOMEN IN MANUFACTURING INDUSTRY

As a result of the massive influx of women into the workforce in 1970s, female participation in the workforce has increased considerably all over Asia, ASEAN being no exception. The highest increases have occurred in countries such as Malaysia, Philippines and Singapore, which have experienced rapid industrial growth, with slower increases in Indonesia and Thailand, where the rate of manufacturing growth has been relatively modest. However, women in the manufacturing sector normally work on repetitive jobs or those which require special dexterity. There are 80% to 90% of women-labour force in electronics industry in Malaysia and Singapore. Most of them are single and between 19-25 years of age. Pervasive discrimination has, however, blocked female entry into a wide range of factory jobs outside textile and electronics industries.

ROLE OF SMALL AND MEDIUM SCALE MANUFACTURING ESTABLISHMENTS IN ASEAN

In the ASEAN small and medium scale enterprises play an important role in the manufacturing industry sector. Cottage and household industries have been important in terms of their employment potential, especially in Indonesia and Philippines, though these have been less important in Malaysia and Singapore. The availability of cheap labour may have had some relevance in the development of the traditional small and medium scale industries in the ASEAN. Though the large scale manufacturing industries have had decisive influence in the post World War II industrialization policy of the ASEAN, the policy makers in the ASEAN have now been interested in the development of the small and medium scale industries due to their large employment potential.

COUNTRYWIDE STUDY OF MANUFACTURING EMPLOYMENT

TABLE 5
INTERCOUNTRY COMPARISON OF SELECTED INDICATORS (1983)

	Indo- nesia	Malay- sia	Philip- pines	Singa- pore	Thai- land
Industry as % of GDP	39	35	36	37	27
Manufacturing as % of GDP	13	19	25	24	19
Services of % of GDP	35	44	42	62	50
Share of manufactured exports in total exports (1982)	3.6	22.8	22.9	48.2	25.9

Source : Industrial Development Review Series : Malaysia, UNIDO (1985)

Indonesia

Indonesia, a lower middle income developing country expanded her economy rapidly, greatly from increased revenue from the oil and gas sector. Manufacturing grew significantly during the 1970s, yet its contribution to GDP is still comparatively small. Though building of an industrial infrastructure was started in the 1st, 2nd and 3rd REPLITA (the main form of state intervention in the economy), it was the 4th REPLITA launched in April 1984 that emphasised industrial growth along with the pervasive agricultural sector and the oil and gas industry. Along with labour-intensive industries, research and technology is also given a big push – lest Indonesia is left further and further behind in the industrial world. Thus, Indonesia is the only country in the region to have a “native” aircraft industry. But the industrial sector's contribution to GDP for Indonesia is still amongst the lowest in ASEAN. However, the 4th REPLITA plans to increase the industrial contribution to the national GDP by 1989, and projection for job creation has been revised upwards from earlier estimates and calls for 1.4 million jobs to be created in industry in the duration of the REPLITA almost a million being in the small scale manufacture.

The structure of the manufacturing sector in Indonesia is heavily oriented towards production of consumer goods for the domestic market and many of the fast growing industries are relatively capital intensive assembly industries. Though some of the traditional and more important industrial branches grew less rapidly, it is these which are overwhelmingly more important in terms of employment. This sector has thus been suggested as an important aspect of industrial development policy. Though undoubtedly substantial indirect employment opportunities have been created by the manufacturing sector in Indonesia through indirect employment

opportunities, the manufacturing sector has not yet had significant direct effect on Indonesia's employment problem. The largest chunk of employment increase has taken place in industries such as textiles, food production industries, wood product industries, etc. A UNIDO (1985) projection of employment concerning manufacture and construction sectors of Indonesia indicates an increase from 6.6 million in 1980 to 8.4 million in 1985 and to 10.6 million in 1990.

The "Indonesianization" programme which is under way in Petrimina (the vehicle of Indonesian Government's oil and gas effort) will attempt to increase the number of trained indigenous workers at all levels of the oil industry. Self-sufficiency which appears in the energy sector will be used in other industrial areas. This will be continued with import substitution and encouragement of "NOE" (non oil exports). The five-year plan has an eight point agenda which not only emphasises development of energy industry, but also of small scale and labour-intensive industries. However, as the 4th REPLITA states, the agricultural sector will grow substantially and will remain the main source of employment creation for years to come.

Malaysia

By the time Malaysia achieved her independence in 1957, manufacturing output constituted only a miniscule 5% of GDP. Realising the importance of industrial expansion for the absorption of urban unemployment, and as a means of reducing Malaysia's over reliance on rubber and tin, the country started to expand manufacturing activity. The "Pioneer Industrial Ordinance" of 1958 was promulgated for attracting both local and, more importantly, foreign capital, and although appearing slightly later on the scene, Malaysia was also selected as one of the venues for the location of such industry, the most spectacular of which is the electronics industry which employs mainly women. By 1968 a considerable number of foreign owned "pioneer firms" were set up which were engaged in import substitution activities. Along with a rapid growth of manufacturing output, employment in this sector also rose in this period.

However, given the high capital intensity of the import substituting industries, the labour absorption capacity of this sector was found to be relatively low and could not be relied upon for solving the unemployment problem in the urban areas. Thus, new industrial strategy capable of generating employment opportunities at a rapid pace was sought through the export promotion type of industries. The export promotion phase has been more successful in reducing the rate of unemployment. Between 1970-80, the manufacturing sector recorded an average annual rate of growth in employment of 7.6%, which was the highest among all sectors. However, not only the export-oriented type of industrial development gave the Malaysian industries a "foot-loose" nature, but with rapidly

rising real wage Malaysia is now losing some of its comparative advantage in labour-intensive production.

The National Economic Policy of 1970 aimed at increasing the role of bumiputras (Malays and other indigenous people), and though the 3rd Malaysian Plan (1975-80) continued emphasis on rapid industrial growth and the development of labour-intensive export-oriented industries, the launching of the 4th Malaysian Plan (1981-85) signalled major policy shifts. The 1984 mid-term review of the 4th national plan foreshadowed shifts of policy emphasis from heavy industries towards downstream industries based on rubber, palm oil and timber. This also included revitalization of the agricultural sector, and envisaged a much greater role for private enterprises.

TABLE 6
SHARE OF MANUFACTURE IN EMPLOYMENT AND GDP
IN MALAYSIA (1960-84) (%)

Year	Share in GDP	Share in Employment
1970	15.7	8.7
1975	17.5	10.1
1980	18.6	15.5
1983	18.0	15.7

Source : Industrial Development Review Series : Malaysia, UNIDO (1985)

Though there is a high growth rate in the total labour force of the country due to an increase in the working age population and in the participation rate of the labour force, particularly women, Malaysia's employment problems are less serious than those of some of her ASEAN partners, especially Indonesia and Philippines. In fact, because there is little endemic rural and urban under-employment, indeed Malaysia's agriculture has been suffering from intermittent labour shortage. The manufacturing sector is expected to be a major source of employment growth with small scale industries playing an important role in job creation particularly in the more developed regions. But with an annual growth rate of labour force projected at 3% through the 1980s, the burden of job creation on manufacturing – one of the leading growth sectors – should be considerable.

Philippines

Industrial development in Philippines since independence has passed through 3 phases : the phase of import substitution of consumer goods in 1950 and 1960s, export-oriented development of labour-intensive industries (electronics

and garments mainly) of 1970s, and heavy industry programmes centered on 11 projects launched in 1979, but curtailed later due to financial constraints.

Like most developing countries, Philippines' manufacturing industry is dualistic in character – besides the modern sector comprising large and medium scale enterprises, there is a large informal sector comprising the small sector. However, unique among developing countries, Philippines has virtually no public enterprises in its manufacturing sector; but similar to all other ASEAN manufacturing, foreign investment plays a major role.

During the period of 1960–74 though the value added in manufacturing grew at an annual average rate of 7% the rate of growth of employment averaged only 3%, barely above that of the labour force. The relatively capital intensive character of much of manufacturing development led employment in this sector to merely keep up with growth in productivity.

Generating productive employment in the Philippines' rapidly growing labour force being one of the country's more serious problems, the export-oriented industrial development policy of the 1970s was directed at this objective, though the strategy was not totally successful. While employment in manufacturing grew faster than total employment and accelerated in the latter half of the 1970s, it lagged behind other industry and service sectors and kept only a little ahead of growth of the labour force. According to a UNIDO report (1985) on Philippines' manufacturing industry, share of employment in manufacturing in total employment remained more or less constant over the period of 1960–83. In fact while manufacturing grew at a rate of 5% per annum, employment grew at a rate of 4% per annum.

In the recent past, due to a variety of external and internal reasons, the Philippine industrial sector has been severely affected, leading to a dramatic decline in output and employment. Except electronics and garment industries all others manufacturing industries are affected, the worst being the motor car assembly industry. In 1978, the National Economic and Development Authority (NEDA) framed a long term development plan for Philippines for the year 2000, and in August 1984 a new updated Philippine Plan for 1984–87. The industrial sector in this plan focuses on the establishment of world competitive industry with special emphasis on agro-based and labour-intensive industries.

Singapore

The rapid rate of industrial growth in Singapore was initially based on the increasing absorption of the labour force into the industrial sector. But by the mid of 1970s, it was becoming obvious that, due to the changing internal conditions and because of the growing threat of increased competition from labour

surplus developing countries, overseas markets for unskilled labour-intensive industries of Singapore were limited. Thus, Singapore put a greater emphasis on skilled labour and technology intensive manufacture, and chose to pursue a policy of wage rise to force manufacturing towards high-value-added products.

Since Singapore lacks natural resources, her manufacturing industries use labour resources to process imported inputs generally using imported capital equipment. By the 1970s, Singapore had a record of full employment, and by 1980, structural transformation occurred in employment composition. Encouraged by emphasis on manufacturing as an export base, some of the workforce shifted to the manufacturing sector. However, due to labour shortage and technologically developed alternatives, labour-intensive manufacturing is no more the rule of the export game in Singapore. From 1980 onwards, in support of policies such as introduction of labour-saving devices and employing labour with better skills, there has been a significant decline in manufacturing employment. By 1983, manufacturing workforce declined by 6%, though productivity rose by 9%. Recession also had its effects on the manufacturing sector. Through progressive manpower planning combined with sound wage and inflation policies, the country hopes to help the economy to adjust to capital intensive production technology, which is increasingly favoured by the MNEs investing in Singapore.

Thailand

Thailand - like all other developing countries at a similar stage of industrial development, embarked in the early 1970s on an outward looking policy for promoting exports of labour-intensive manufacture. By 1980, the structure of Thailand's manufacturing sector had changed and in relation to the importance of processing industry, labour-intensive export had risen in four chief branches - textiles, clothing, electronics assembly and precious stones.

In the past 30 years, with contribution of manufacturing to GDP, Thailand has been transformed from a predominantly agri-economy into a semi-industrial economy. From an initial small manufacturing sector, the country's industrial development has passed through several phases. The latest phase incorporated in the just completed 5th five-year plan 1981-82 to 1986-87 was to achieve a more labour-intensive industrialization strategy without jeopardizing the efforts to improve productivity of both import substitution and export-oriented industries. While Thailand still enjoys a comparative advantage in labour-intensive manufacturing, a range of capital intensive industries have been allowed to develop.

TABLE 7
GROWTH RATE OF EMPLOYMENT IN THAILAND(1970-80)

Sector	% per annum
Agriculture	2.52
Industry	6.42
Manufacture	6.75
Total	3.30

Source : Industrial Development Review Series, UNIDO (1985)

According to a recent World Bank report (1986), all the major sectors of Thai economy – agriculture, industry and services – have performed less well than earlier hoped, and in 1985, for the first time in Thai history, the value of manufacturing output exceeded agricultural output. The Thai government has given a high priority to employment issues in the preparation of their 6th five-year plan, and though, like all developing countries, sectoral distribution of employment has changed significantly over the last 25 years, Thailand still remains an overwhelmingly agricultural society. While the share of manufacturing in total employment has tripled since 1960, and now stands almost at 10%, over two-thirds of employment are still found in agriculture. According to World Bank estimate, contributions to employment growth in Thailand during 1977-83 have been agriculture (44.2%) and manufacture (12.2%). Because the shift out of agriculture has been much less dramatic in Thailand than in any other successful middle income country, the World Bank report implies that the Thai industrial sectoral growth may turn out to be too small to adjust new entrants to the labour force.

TABLE 8
SECTORAL DISTRIBUTION OF EMPLOYMENT LABOUR FORCE (%)

Sector	1960	1970	1983
Agriculture	82.0	78.3	68.8
Manufacture	3.4	4.1	7.4

Source : World Bank Report, Thailand (1986)

Thus, even though manufacturing industry continues to play an increasingly important role in absorbing labour, it is likely to remain a relatively minor contributor for the rest of the decade of 1980 providing only 12% additional employment.

CONCLUDING REMARKS

As a consequence of reasons such as population explosion, for an increasing number of developing countries, employment is emerging as a more serious problem than the much more widely discussed question of the inadequacy of food supplies. Faced with an increase in the demand for work, the growth of jobs in the "modern" sector - especially the core sectors of manufacturing and public utility infrastructure - is turning out to be insufficient to match prospective requirements. Except in a very few countries, the expansion of manufacturing employment has had only a marginal impact on total employment. Worldwide recession has also left impact on employment issues. Though growth in ASEAN countries has been buoyant, unemployment and underemployment remain severe problems. Decline in output and slowdown in activity, particularly in the organised sectors like manufacturing, mining, trade and transport have led to a slow growth in employment or an increase in unemployment.

Though there are considerable problems in trying to generalise from cross country experiences, two sets of conclusions appear to emerge from a study of the employment issues in the manufacturing sector of the ASEAN. The first is that the set of incentives provided to the industrial sector has favoured the adoption of capital intensive technology; the second is that movements away from the narrow path of import substitution industrialisation and towards the export sector have led to the development of more labour-intensive industries with a favourable impact on employment generation.

In the ASEAN countries, especially Thailand, Indonesia and Philippines, the industrial sector, because of its limited capacity of employment creation, fell short of absorbing disguised unemployment in the traditional sector and thus failed to reduce the employment share of the traditional and informal sectors characterized by low productivity and income. The disparity in productivity between the modern and the traditional sector continued to widen, and the sizable presence of disguised trend in income distribution showed no appreciable improvement in these countries. In the present environment employers in ASEAN are using the threat of "foreign competition" to justify job and wage cuts. However, if all employers cut back, the already inadequate purchasing power of working people may be further reduced, in turn diminishing market demand.

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