Sandya Institute Research Paper

Unlocking the Economic Potentials of Indonesia's Refugee Community:

A Survey on Labour Characteristics

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Photo: Reuters

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Abstract: *As of September 2019, Indonesia has been the unintentional home to approximately 13,657 refugees. Most of these individuals from Afghanistan and Somalia left their home countries in search of safety and to escape life-threatening circumstances with the intention of seeking asylum in elsewhere. However, geo-political circumstances have led to refugee communities forming in other unintended destinations. The population of refugees currently residing in Indonesia proves to be one of the smallest groups of refugees on a regional level. With a limited policy framework in place, the looming threat of a decline in international assistance, and the small population of refugees, now is the ideal time to form and enact policies that allow for temporary but sustaining livelihood opportunities for the refugee community in Indonesia as they wait, often for years, for resettlement. In order to create policy concerning temporary livelihood activities, substantive and data-driven research is required to inform recommendations concerning potential employment, entrepreneurial, and educational opportunities best suited for the refugee community without disrupting Indonesian economic and education systems. By conducting literature reviews and collecting survey information on the labour and educational characteristics of refugees, a framework of action has been proposed. The proposed framework, which focus on actions Indonesian policymakers can take to advance the development of temporary livelihood opportunities demonstrates that refugees can obtain an independent and humane living while supporting Indonesian institutions and economic growth.*

Keywords**:** Refugee**,** Indonesia, Human Rights, Labour Market

Unlocking the Potentials of Indonesia's Refugee Population for the Advancement of a Sustained and Independent Livelihood: A Survey on Labour Characteristics

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Published by:
Sandya Institute
Rajawali Center, Jl. Rajawali Blok B 1 No.5
Pasar Minggu, Jakarta Selatan 12520
Indonesia

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Sandya Institute Research Project FY2018 No. 1
Published November 2019

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Preface

Sandya Institute began conducting this project in September 2018 in order to improve the ability of humanitarian efforts to serve the refugee population in Indonesia. By surveying the refugee population over the age of eighteen in regards to its employment histories and skills, Sandya Institute has been able to further the conversation concerning access to temporary livelihood opportunities for refugees as they wait for resettlement.

During the creation of this research paper, Sandya Institute has had the assistance of over 65 members of the DKI Jakarta, Medan, and Makassar refugee communities who have taken on roles as community leaders and refugee representatives. Their assistance has been vital to the successful outreach of this project by ensuring community control and input in the initiative. These 65 members were trained and provided certified recognition for their training on how to conduct and disperse surveys in their respective cities. For over one month, each member worked to collect physical responses and to assist others in gaining access to the survey electronically.

This research, titled *Unlocking the Economic Potentials of Indonesia's Refugee Community: A Survey on Labour Characteristics*, was created with the input and consideration of members of the refugee communities. The formulation of questions, translations, focus group discussions, analysis, and policy proposals were driven by input from the individuals and communities affected by this work.

The results of this survey broadly reflect the political and economic situation of refugees in Indonesia. Utilizing this information, Sandya Institute has created a policy proposal and framework to address the existing shortfalls and complexities in the treatment of refugees in Indonesia. Sandya Institute will continue to monitor the progress of the status of refugees and seek to update these proposals as the policy environment changes.

Embarking on this project required the further cooperation and support from our fellow civil society and humanitarian organizations. The Sandya Institute team would like to express their gratitude and acknowledge the following groups as institutions supporting and endorsing this research:

Location	Representative Name	Organization Name
Jakarta	Mohammad Baqir Bayani	Health, Education and Learning Program- HELP- for Refugees
Jakarta	Ahmad Basir Zaffari	Refugee Learning Nest
Jakarta	Febi Yonesta	SUAKA: Indonesian Civil Society Association For Refugee Rights Protection
Jakarta	Mohammad Hussain Sultani	Hope Learning Center (HLC)
Jakarta	Ms. Ann Maymann	United Nations High Commissioner for Refugees (UNHCR)

Foreword of Sandya

Currently, we are faced with wars, violence and persecution that have made more than 68.5 million people being forcibly displaced worldwide, we are in the midst of the most challenging global refugee crisis in the history of humanity. Although Indonesia has yet to ratify the 1951 Convention Relating to the Status of Refugee and 1967 Protocol Relating to the Status of Refugee, the country has a long tradition of hosting refugees and people in need of international protection. As of September 2019, Indonesia accommodates around 13,657 refugees from 42 different countries.

Among the 13,657 refugees and asylum seekers, only few are successfully resettled to the third country. In most cases, they live with limited rights to obtain education, livelihood, accommodation and health services. We listened and discussed with the refugees and asylum-seekers community and after the discussion, we learnt that the community is full of potential, hence we believe that their lives would be better off if they are able to attain access to livelihood. Hence, we work together with the United Nations High Commissioner for Refugees (UNHCR) and refugee colleagues to conduct this research. Sandya Institute would like to express our gratitude to all of our partners for this productive collaboration, as an institution that works to promote and protect the rights of minorities and refugees in Indonesia, we are committed to further the development of this research and to assist stakeholders to find comprehensive solutions for asylum seekers and refugees in Indonesia as our means to implement the value that is enshrined in the Universal Declaration of Human Rights.

SANDYA INSTITUTE
CENTER FOR PEACE & HUMAN RIGHTS

Diovio Alfath
Executive Director of Sandya Institute

UNHCR
United Nations High Commissioner for Refugees
Haut Commissariat des Nations Unies pour les réfugiés

Foreword by UNHCR Representative in Indonesia, Ann Maymann

"Unlocking the Economic Potentials of Indonesia's Refugee Community:
A Survey on Labour Characteristics"

It is an honour to offer a foreword to this important research paper "Unlocking the Economic Potentials of Indonesia's Refugee Community: A Survey on Labour Characteristics". The evidence-based findings and policy recommendations in this report serve as an essential advocacy tool and at the same time it articulates a constructive way forward towards the beginning of a more sustainable solution for refugees in Indonesia, at a time when innovative solutions are needed more than ever.

We are unquestionably at an important moment in history. The number of forcibly displaced globally has reached more than 70 million, while at the same time very few refugees are able to return home safely, and third country resettlement opportunities are also severely reduced – it's clear that new innovative and complementary approaches are needed to effectively address the fact that millions of human beings continue to be without effective protection and access to minimum services and opportunities to fulfil their potentials. This is the tragedy, both for the individuals and for human kind on our planet. Following the landmark adoption of the New York Declaration in 2016 when the national States of the world reaffirmed their commitment to protect refugees, and the historic adoption of the Global Compact on Refugees in 2018 by the world leaders in the UN General Assembly, and as we draw near to the Global Refugee Forum, national States as part of the international community now has an opportunity to demonstrate new approaches through strengthened cooperation and solidarity with refugees and host countries worldwide.

Indonesia has shown important humanitarian leadership in this regard, and continued commitment to the protection of refugees. This is demonstrated in the Presidential Regulation No. 125/2016 on the Handling of Refugees, as well as an increasing recognition of the need for refugee empowerment as a means for refugees to become self-reliant, contribute to their generous host communities, fulfil their human and intellectual potential to the benefit of Indonesia and increase their opportunities for the future. At this challenging time of changes in the assistance landscape and limited third country opportunities, UNHCR stands ready to enhance and amplify its support to the Government of Indonesia in protecting refugees and developing new and innovative solutions.

I take this opportunity to express my profound and heartfelt thanks to Sandya Institute for its unwavering commitment to promoting an understanding of the importance of ensuring refugees' rights in Indonesia, exemplified in the high quality of research and important practical and constructive recommendations contained in this report. UNHCR is grateful and pleased to continue the strong collaboration with Sandya in support of refugees in Indonesia.

11 December 2019

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Special Thank You

To all of the volunteers that made this research possible and for having hope for a better tomorrow.

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List of Terminology and Definitions[2]

Asylum-seekers – are individuals who have sought international protection and whose claims for refugee status have not yet been determined, irrespective of when they may have been lodged.

Department of Immigration and Border Protection of Australia (DIBP) – As of December 2017, DIBP was subsumed into the Department of Home Affairs. DIBP is responsible for immigration/customs border policy, as well as national security and foreign policy related affairs.

Internally displaced persons (IDPs) – are people or groups of individuals who have been forced to leave their homes or places of habitual residence, in particular as a result of, or in order to avoid the effects of armed conflict, situations of generalized violence, violations of human rights, or natural or man-made disasters, and who have not crossed an international border. For the purposes of UNHCR's statistics, this population only includes conflict-generated IDPs to whom the Office extends protection and/or assistance.

International Organization for Migration (IOM) – Established in 1951, the International Organization for Migration (IOM) - UN Migration - is the leading inter-governmental organization dedicated to promoting humane and orderly migration for the benefit of all. It does so by advancing the understanding of migration issues, assisting governments in meeting the challenges of migration, encouraging social and economic development through migration, and upholding the dignity and well-being of migrants, their families and their communities.

Others of concern –individuals who do not fall into any of the other groups, but whom UNHCR extends its protection and/or assistance services, based on humanitarian or other special grounds.

Refugees – include individuals recognized under the 1951 Convention relating to the Status of Refugees; its 1967 Protocol; the 1969 OAU Convention Governing the Specific Aspects of Refugee Problems in Africa; those recognized in accordance with the UNHCR Statute; individuals granted complementary forms of protection; or those enjoying temporary protection. Since 2007, the refugee population also includes people in a refugee-like situation.

Returned IDPs – refer to those IDPs who were beneficiaries of UNHCR's protection and assistance activities and who returned to their areas of origin or habitual residence during the year.

Returned refugees – are former refugees who have returned to their country of origin spontaneously or in an organized fashion but are yet to be fully integrated. Such return would normally only take place in conditions of safety and dignity.

Stateless persons – under international law as persons who are not considered as nationals by any State under the operation of its law. In other words, they do not possess the nationality of any State.

United Nations High Commissioner for Refugees (UNHCR) – the UN Refugee Agency, is a global organization dedicated to saving lives, protecting rights and building a better future for refugees, forcibly displaced communities and stateless people.

[2] Note: Terms/definitions are from the UNHCR, IOM, and Department of Home Affairs websites.

1. *INTRODUCTION AND BACKGROUND*

In June 2019, the United Nations High Commissioner for Refugees (UNHCR) estimated that there are more than 70.8 million forcibly displaced people worldwide. This figure represents a remarkably high degree of displacement – in fact, the highest level of displacement since World War Two (UNHCR, 2018). Out of the estimated 70.8 million people, 41.3 million are internally displaced, 25.9 million are refugees, and 3.5 million are asylum-seekers. Additionally, out of the 25.9 million refugees, over half are reported to be under the age of 18 years (United Nations, 2019). While a large portion of the refugee and asylum seeker population is concentrated within the Middle East and Africa, a significant but often forgotten share resides in Southeast Asia.

As of 2018, the United Nations (UN) estimated that there were 3.26 million people of concern in Southeast Asia, an increase of 15.4% compared to 2017. From this number, approximately 1.2 million were classified as either refugees, in refugee-like situations, or asylum-seekers (UNHCR SE Asia, 2019). Despite the significant number of people of concern, just three countries in the region (Cambodia, Philippines, and East Timor) are signatories to the 1951 Convention relating to the Status of Refugees; most others have agreed only to respect the principle of non-refoulment. While there is a general understanding not to force refugees and asylum-seekers back to their origin countries, the majority of these countries lack the proper infrastructures, procedures, resources, and policy frameworks to assist these individuals.

One of the countries that is not a signatory to the 1951 Convention relating to the Status of Refugees or its 1967 Protocol is Indonesia. As a result, UNHCR processes claims and oversees many of the protection efforts for refugees in Indonesia on behalf of the government. Indonesia has allowed certified refugees and asylum-seekers to remain within its borders as they await resettlement in a third country or UN refugee status review. Those that arrive in Indonesia are allowed to stay temporarily as they seek a final settlement decision.

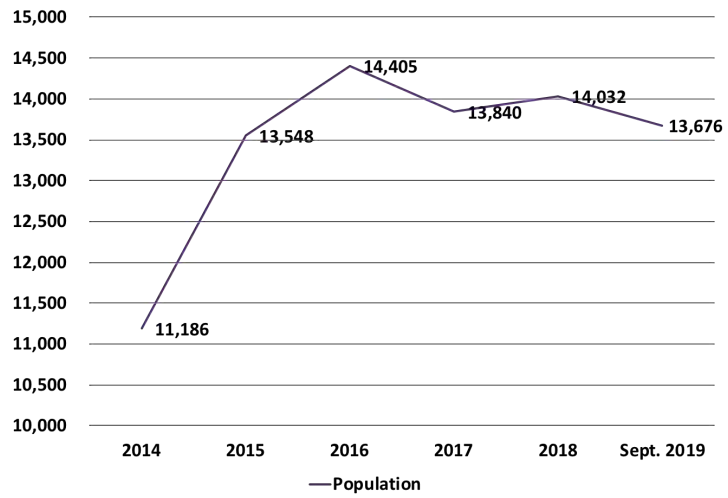
Looking beyond its borders, Indonesia is surrounded by countries hosting large numbers of asylum-seekers and refugees. Recent figures have shown that Thailand (The UN Refugee Agency Thailand, 2019) is home to approximately 93,000 refugees and asylum-seekers while Malaysia (United Nations Malaysia, n.d.) hosts 178,000. As for Indonesia's population of displaced people, the number of arrivals began to increase in 2009. In 2016, the population reached 14,405 and has remained relatively stable since then with a slight decline.

In September 2019 (UNHCR Indonesia, 2019), UNHCR reported that the total population of those registered with UNHCR declined to 13,657 individuals (Figure 1). This figure includes 10,374 refugees and 3,302 asylum-seekers from 42 different countries, all defined as refugees under Indonesian law. A majority of these individuals come from three countries in particular: Afghanistan, Myanmar, and Somalia (UNHCR Indonesia, n.d.).

The process of seeking asylum in a third settlement country is often gruelingly long and unlikely to result in any action that will make the resettlement occurs. In 2019 (through September), 537 individuals departed Indonesia for resettlement and 190 voluntarily returned to their home country. During the same time span, the country saw 368 new cases (759 individuals) registered with UNHCR. Considering the size of the existing population and the small but continuous flow of refugee arrivals that maintains the stability of the overall population, resettlements are not occurring at a rate that allows for the expediate departure of refugees from Indonesia (UNHCR Indonesia, 2019). While this large proportion of the population waits for resettlement, refugees are unable to seek legal employment and face significant barriers to other livelihood opportunities such as education.

International organizations are currently the main source of livelihood reliance for those waiting upon resettlement from Indonesia. However, the current policy framework does not provide means for self-sustaining opportunities in instances where funding is unavailable or global dynamics lead to reductions in international funding. Assistance is not provided universally to all members of the refugee community due to funding restrictions and limitations. Furthermore, the promise of funding from international organizations for the foreseeable future is not guaranteed (UNHCR Indonesia, Meeting, 2019). In the 2018 UNHCR planning figures (UNHCR Indonesia, Global Focus, 2019), it was estimated that 300 family households are eligible for cash grants and approximately 8,000 individuals are receiving some degree of assistance from the International Organization for Migration (IOM) (International Organization for Migration, 2019).

Figure 1: Refugees and Asylum Seekers Registered in Indonesia



Source: Authors and UNHCR, September 2019

Individuals can be left waiting for years during the resettlement process without any certainty of what may lie ahead. With the restrictions on resettlement in Australia for refugees who registered with the UNHCR in Indonesia after July 2014 (Farrell, 2014) and the continuing cuts to US refugee intake (Shear & Kanno-Youngs, 2019), the prospect of resettlement looks grim. Recent reforms in 2016 made by the Indonesian President Joko Widodo have provided some improvement to the condition of refugees living in Indonesia, creating a very preliminary framework for defining and addressing the issue of the present population of refugees. However, significant reforms are still required in order to ensure that Indonesia is prepared to enable a community of self-sustaining refugees and asylum-seekers that will benefit the Indonesian economy and limit costs to the Indonesian taxpayer.

The inability to access formal and non-formal occupations, educational opportunities, and financial tools has imposed not only severe fiscal constraints but also mental and emotional burdens on the lives of these individuals (IOM, 2019). Considering the long waiting period, and the inability to return to their home countries, it would be a very reasonable accommodation to develop a means to allow refugees and asylum-seekers to engage with the Indonesian labour market in a manner that ensures a balance of interests for all stakeholders. Such an initiative has often faced resistance over concerns of an over-saturated labour market in which an influx of new workers might only worsen economic conditions for all. However, there is reason to believe that introducing this new labour force into the Indonesian market in a planned and measured process will support economic growth with

minimal harm. It is certainly possible that Indonesians and refugees/asylum-seekers can simultaneously reap economic benefits. Furthermore, providing a path to a self-sustaining livelihood will ensure that the Indonesian government is not forced into a fiscally difficult situation if international support declines or ceases to exist.

In order to determine if Indonesia has the potential to bring about economic benefits from the introduction of this new labour force, Sandya Institute has set out to conduct a survey of the population of refugee and asylum-seekers living in Indonesia. Our team visited three key cities; Jakarta (and the surrounding areas), Medan, and Makassar, in Indonesia to gather information on the labour and economic conditions of this population. Upon collecting the data, the team conducted an initial qualitative analysis to compare and highlight the potential impact refugees and asylum-seekers may have on Indonesia's labour market. This process was conducted to produce a policy framework proposal for a long-term pathway to assured temporary livelihood opportunities for refugees during the resettlement waiting period. Through this analysis, Sandya Institute has been able to identify which sectors refugees may be able to contribute to within the Indonesian labour market.

In the following sections, the authors will provide a literature review supporting the case for the benefits of temporary livelihood opportunities in Indonesia. Next, an explanation on the survey methodology will be detailed. Finally, this paper will conclude with the presentation of survey outcomes and an analysis of these results in the context of the Indonesian policy environment.

2. *LITERATURE REVIEW – REFUGEE ECONOMIC IMPACTS IN CONTEXT*

Considering the long global history of forced and involuntary migration, our study began with a review of global case studies concerning the introduction of new populations into different cities, states, and countries across the globe. Previous studies have focused on the economic impact of refugees and migrants on their host countries under a variety of conditions in Europe, Africa, Asia, and the Middle East. A large share of these studies highlights the economic growth driven by the refugee populations in these regions once they are provided with the opportunity to engage in temporary livelihood activities.

In his 2018 study, Mortiz Marbach (Marbach, Hainmueller, & Hangartner, 2018) discussed how long-term employment bans in Germany affected the ability of refugees to develop self-sustaining economic opportunities at the end of the prohibition period. In his case study, the costs borne to

taxpayers for maintaining the livelihood of the community during this period accumulated to approximately IDR 620 billion (40 million Euros) per year in welfare and forgone tax revenues. Another study focusing on the effects of refugees in Germany found that failure to integrate the 800,000 migrants (equivalent to 1% of initial German population) could reduce per capita output and consumption by 0.43% and 0.48%, respectively. However, if integration measures were successful, per capita output and consumption gains of 0.34% and 0.38% could be obtained, respectively. Additionally, it was found that by establishing an integration framework that aligned the needs and goals of the migrant and native populations, there were no significant long-term effects on GDP and consumption. Overall, the model suggested that the macroeconomic impact of refugee migration was small (Stahler, 2017).

Further east in Turkey, there is a work program available for the population of approximately three million Syrian refugees. Studies of this policy found that the larger inflows of refugees have induced a positive shock on firms' intensive and extensive margins of production, concentrated in the informal economy. These effects have been larger for smaller firms and those operating in construction, hotels, and restaurants (Altindag, Bakis, & Rozo, 2018). It was also found that the inflow of aid provided by the Turkish government, international governments, and non-governmental organizations was eventually channeled from refugee camps towards the bottom lines of local firms (Erdogan & Unver, 2015). The International Rescue Committee emphasized in its own research that investments in the Syrian refugee communities have contributed to job creation and consumer spending on food, rents and services, bolstering the local economy (International Rescue Committee, 2016). Other studies have shown losses in Turkey's informal economy but these losses were accompanied by reported decline in the cost of informal goods (Tumen, 2016). Despite there being losses reported in some instances, it was also evident that there was no crowding-out in formal labour markets (Akgündüz, van den Berg, & Hassink, 2015).

Looking towards other international case studies, Africa has also proved to be an area of heavy research interest. Reports have revealed refugee driven economic benefits across Africa, in particular emphasizing the fiscal stimulation to local businesses upon the arrival of refugee aid and an international presence to manage the crisis (Miller, 2018). In Rwanda, Congolese refugees who received cash aid contributed to increased annual real incomes in the local economy by $205 to $253, significantly more than the $120–$126 in aid each refugee received (Taylor, Filipski, Alloush, Gupta, Valdes, & Gonzalez-Estrada, 2016). Such findings lead to the assumption, in conjunction with other literature, that self-sustaining refugees will be a value-add to their local economies.

When compared to the situation of refugees in Indonesia, the primary difference is that only international organizations and non-profits provide aid and support. This scenario means that there are very limited local government costs in the short-run and long-run. However, the reliance on external support puts Indonesia in a vulnerable position should there be a withdrawal of this support.

International aid in Indonesia is largely provided by UNHCR and The Department of Immigration and Border Protection of Australia (DIBP) via the IOM. 2016 figures showed that Australia funded US$40 million of the IOM's US$49 million of aid across the country. However, in an attempt to stem the flow of new migrants to Indonesia, DIBP decided on 15 March 2018 to cease giving the previously automatic funding to any new migrants who were not part of the organization's caseload effective that date (Lamb & Doherty, 2018). Such actions illustrate how the potential withdrawal of international funding is a realistic and pressing threat.

Applying these lessons from abroad to the case of Indonesia, it is possible to conclude that a one-time influx of migrants may scale up the economy proportionately to the increase in the labour force numbers associated with migration. The adjustment to the new equilibrium will occur faster in an open economy which can import capital to accompany the larger labour force and where the expansion of labour-intensive export industries can expand to absorb the additional labour (Dadush, & Niebuhr, 2016). Such a vision corresponds with the Masterplan for Acceleration and Expansion of Indonesia Economic Development (MP3EI) plan since there is a strong emphasis on increasing Indonesian economic growth on a macroeconomic level and to grow Indonesian exports (Indonesian Coordinating Ministry for Economic Affairs, 2011). The vision for 2025 will be achieved by focusing on three main goals:

1. To increase value-adding and expanding the value chain for industrial production processes and to increase the efficiency of the distribution network. In addition, to increase the capability of the industry to access and utilize both natural and human resources.
2. To encourage efficiency in production and improve marketing efforts to further integrate domestic markets, strengthening the national economy and increasing global competitiveness.
3. To push for strengthening of the national innovation system in the areas of production process and marketing, with a focus on the overall strengthening of sustainable global competitiveness through a research-&-development-driven economy.

Progress toward each of these goals would undoubtedly be made if Indonesia took advantage of the manageable population of international labour that is available in the refugee communities, one that can help grow wholesale as well as export-oriented industries. The international perspectives of

refugees can also help to facilitate Indonesian-led innovation that will leave a lasting impact beyond the stays of individual refugees. Overall, the benefits of refugee labour can contribute to significant growths in productivity while the downsides are close to zero due to the insignificant size of the refugee population in Indonesia (less than 0.01%). Looking at a case-study based in the United States, it was demonstrated that refugees can increase international trade, shifting preferences towards the goods of their country of origin and by reducing bilateral transaction costs, both of which would increase imports and exports under proper conditions (Steingress, 2018). These improvements would align well with the growth goals of the current administration.

Finally, looking across Southeast Asia, neighbors Malaysia and Thailand (Human Rights Watch, 2017) have also had to manage their large populations of refugees and asylum-seekers. Similar to Indonesia, both countries do not permit refugees to seek formal employment opportunities or acknowledge their ability to engage in grey-markets. In a recent 2019 report, the Malaysian Institute for Democracy and Economic Affairs (Institute for Democracy and Economic Affairs, 2019) estimated that providing refugees the legal right to work would result in a RM3 billion (over 10 trillion IDR) increase to Gross Domestic Product (GDP) by 2024 through higher spending along with secondary effects. They also reported that allowing refugees to work could lead to tax contributions totalling in RM50 million (170 billion IDR) each year by 2024. Their final finding highlighted that refugee related stimulation can produce 4,000 new jobs for Malaysians as well (Todd, Amirullah, & Shin, 2019).

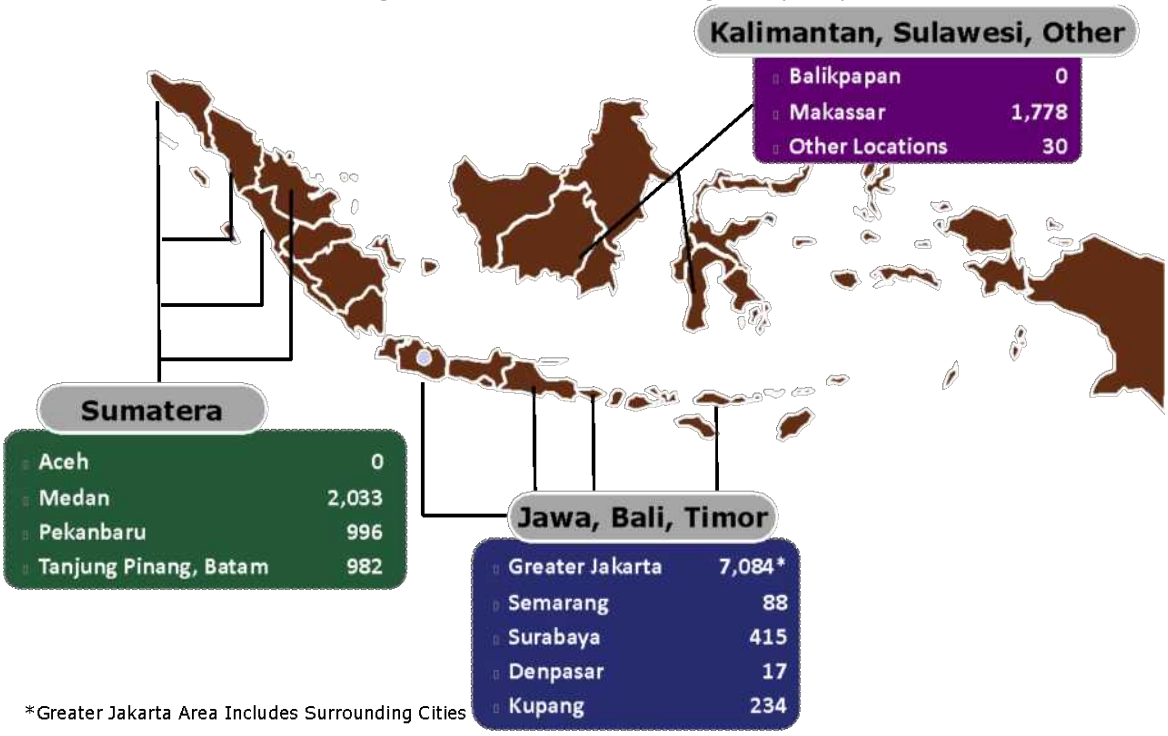
Concerns may persist that introducing low-skilled workers into the Indonesian economy may displace the existing workforce of low-skilled Indonesians. However, based on studying the experiences of countries that have opened their labour market to refugees and migrant workers, Sandya Institute has demonstrated that the long-run impacts are overwhelmingly positive, especially if the workers remain in the labour market without discrimination. Granting labour market access to refugees may even be the answer to raise Indonesia's level of productivity and solve skill-mismatch in the labour market if appropriate policies are crafted.

Placing all of these case-studies into context requires consideration of each nations' economic standing and unique identity. However, the research team confidently believes that there is a means for the improvement of refugee livelihoods by expanding and solidifying policy frameworks concerning temporary stay opportunities. These improvements, in turn, will increase Indonesia's economic standing and enrich its unique cultural identity.

3. *RESEARCH METHODOLOGY*

In order to explore the labour characteristics of the refugee community in Indonesia, Sandya Institute conducted extensive field research in Jakarta (Greater Jakarta or DKI Jakarta), Medan, and Makassar in September 2019. These three cities were identified for survey collection due to their relatively higher concentration of refugees (Figure 2). Our methodology utilized an inclusive, decentralized, and digital process to maintain the integrity of the data collected and the ownership of the research narrative by the refugee community.

Figure 2: Population of Refugees by City



Source: Authors and UNHCR, September 2019

Throughout 2018, Sandya Institute worked to develop a 31-question survey divided into three parts. Part One focused on demographic characteristics (such as age, country of origin, city of residence, and time living in Indonesia). Part Two on economic and employment characteristics, and Part Three was a free response question allowing survey participants to share narrative and qualitative information about their lives in Indonesia. The three sections were developed in close consultation

with members of the refugee community as well as experts in the field of labour economics. Furthermore, the finalized survey was translated by the members of the refugee community into four other languages (Somali, Arabic, Farsi/Persian, and Tamil), besides English.

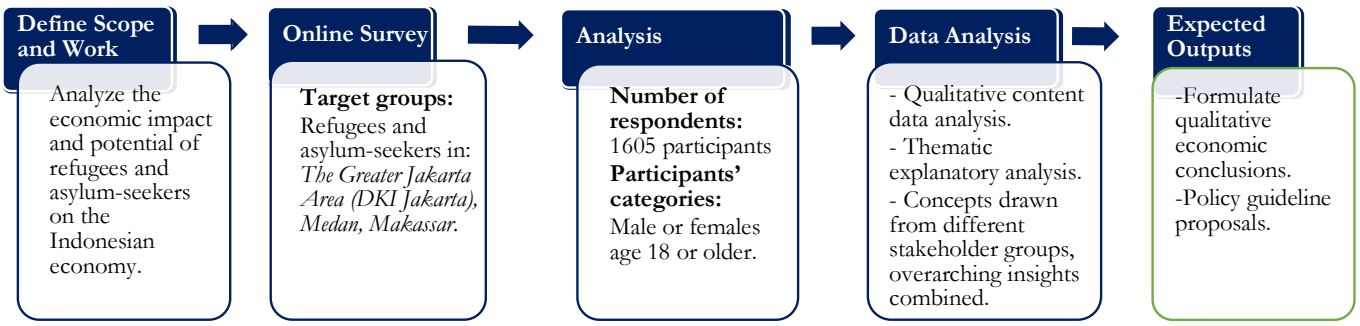
The survey consisted of three general styles of questions across the three sections. The styles of questions were categorized as:

1. Matrix Multiple choice (one answer)
2. Multiple choice (many answers)
3. Open-ended question: *Previous employment/income/expenditures/comments*

Each question style was designed to capture various elements of importance and preference for participants on a range of issues and solutions within their respective categories.

The five surveys were then made available on an online survey platform[3] for approximately four weeks in each city of interest. To start the survey's dissemination, Sandya Institute enlisted the assistance of 65 refugee community members and leaders (ages 18 to 59) to conduct and collect a maximum of 30 surveys per-member within their respective communities, targeting individuals age 18 to 59. Volunteers were selected based on availability, relationship with Sandya Institute, and connections within their own communities. Prior to starting their individual collections, all volunteers were required to attend a two-hour certification training run by Sandya Institute on conducting and collecting surveys. The research team targeted individuals over the age of 18, which was determined to be the starting point for working age. The overall project flow has been outlined in Figure 3 to demonstrate the purpose, outputs, and reasoning behind each step.

Figure 3: Labour Survey Flow



Source: Authors, September 2019

[3] Note: The online platform used was Zoho Survey Pro Package

In total, Sandya Institute received 2,820 surveys, of which 1,605 were complete and 1,215 were incomplete. A survey was considered complete if the final four questions, corresponding to the final page of the survey, were answered. The 1,605 completed responses were then scanned using the statistical processing software R to confirm that there were no duplicates. The data was subsequently aggregated into one comma-separated values (CSV) file for further processing and analysis using R and another software language, Python.

Before the results were analyzed, data cleaning occurred. First, all responses were translated to English using Python-encoded translating via the Google Cloud Translator. Using Python as well as manual inspection, the research team resolved technical inconsistencies across responses. For instance, most participants reported their former income in their origin country in the currency of that country, as opposed to Indonesian Rupiah (IDR). The solution to these inconsistencies, for the sake of comparison, was to convert all of the monetary amounts to IDR. It is important to note that technical data cleaning of this type was carried out only when necessary for one-to-one assessment; Sandya Institute did not alter the content of any of the original responses. Additional statistical processing strategies such as one-hot encoding was used to prepare the data for analysis.

Once the data was thoroughly cleaned, analysis was conducted to draw conclusions about the 1,605 respondents as a whole, as well as about respondents from each of the three cities (DKI Jakarta, Medan, and Makassar). These conclusions will be detailed in the following sections of this paper. All tables of results shown were produced using R, specifically the software's ggplot2 package.

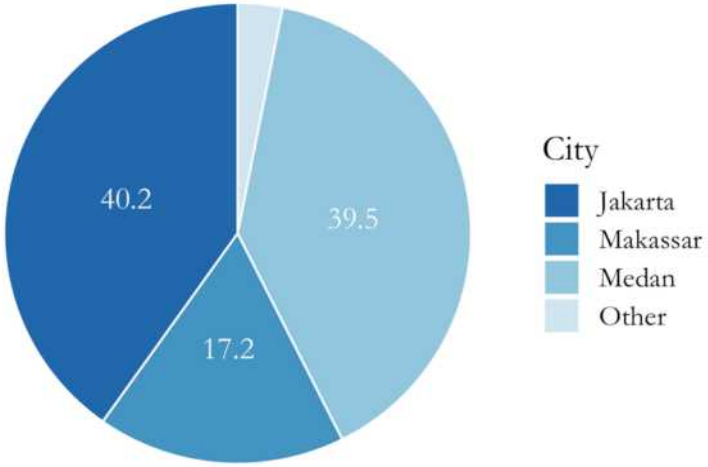
4. *SURVEY RESULTS*

Upon the initial distribution of this survey, the online platform reported 2,820 engagements across all five language options. The survey remained open for a total of 4 weeks in each focus city with a total of 1,605 eligible responses upon review of completeness and usability. By utilizing the collected answers, this section elaborates the respondents' profile and further identifying the economic profiles for refugees within the Indonesian market. Details of the survey results have been summarised in Appendix A.

4.1. Geographic Distribution of Responses

With an estimate of 4,853 refugees over the age of 18 in DKI Jakarta, 1,310 in Medan, and 1,380 in Makassar (UNHCR Indonesia, Internal Population Data, 2019), the team was able to successfully collect approximately 97% of all responses from these three cities (some responses were completed outside of the target area due to the survey being digitally distributed). In an evaluation of the coverage of this population, the survey received responses from 13% of working aged refugees in Jakarta, 20% of working aged refugees in Makassar, and 48% of working aged refugees in Medan. Figure 4 shows the share of surveys collected based on the three cities of focus.

Figure 4: Share of Surveys Collected by City

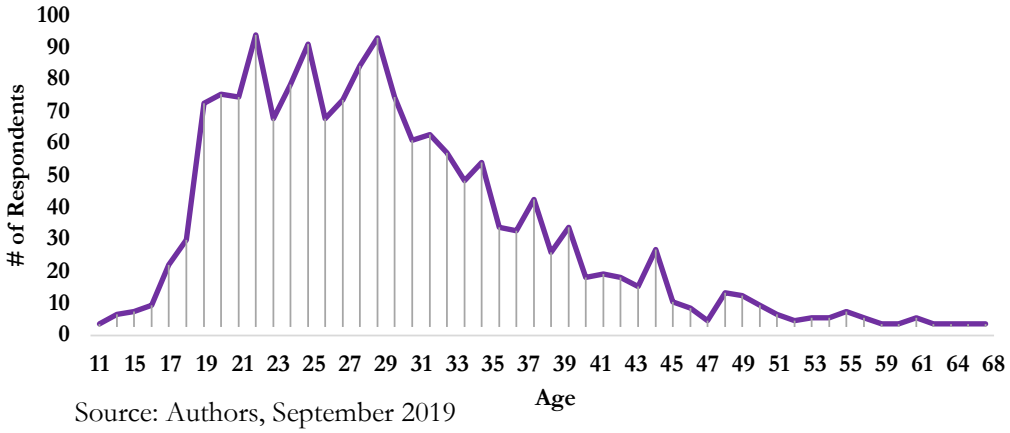


Source: Authors, September 2019

4.2. Participant Profiling

In this study, Sandya Institute collected 1,605 responses, which corresponds to 11.75% of the entire refugee population in Indonesia. The survey found that the average age of those sampled was 29 years old and the median age was 28 years old (Figure 5). Of the total population of refugees over the age of 18 and younger than 59, the survey came into contact with approximately 16.3% of individuals in the population. These results can serve as a source indicator representing the overall population.

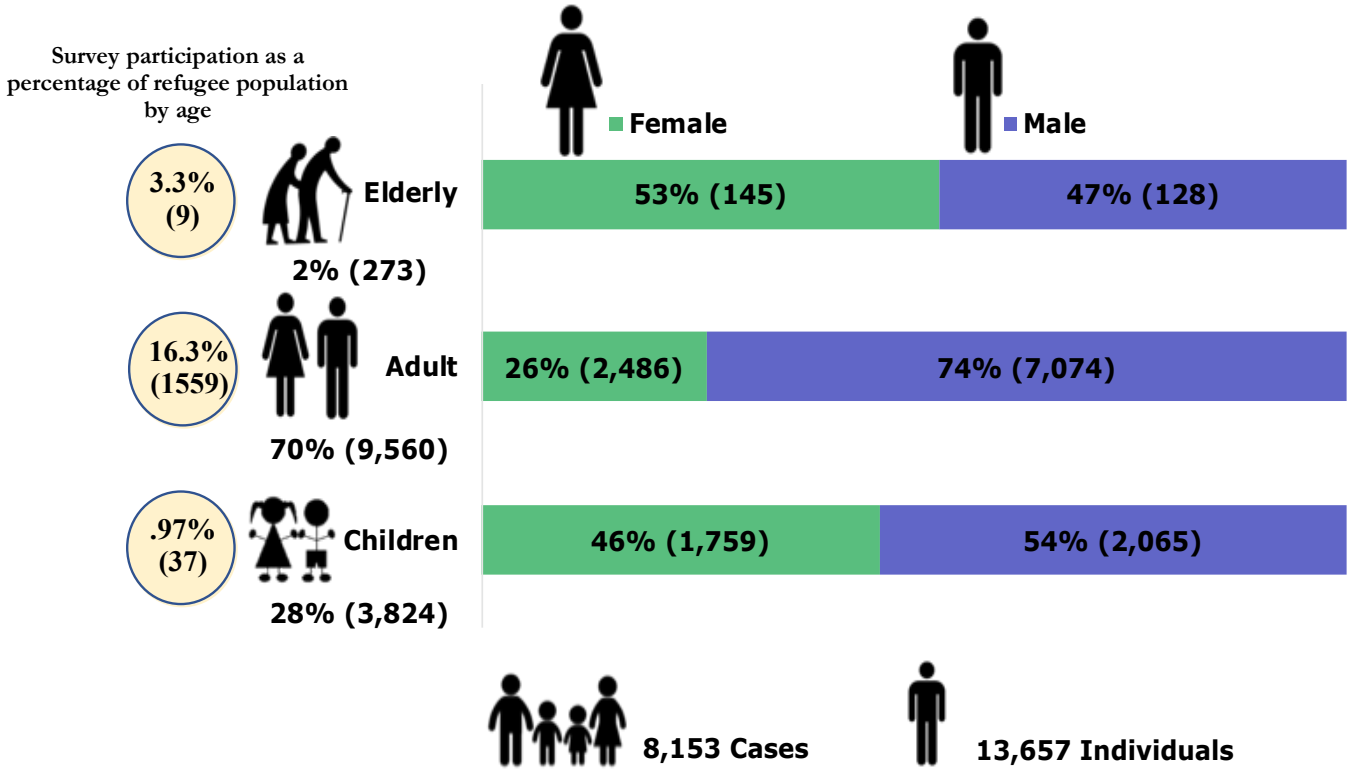
Figure 5: Number of Respondents per Reported Age



Source: Authors, September 2019

Approximate representation of the overall refugee population was also taken into consideration before the data was analyzed. The current population of refugees in Indonesia is 32% female and 68% male. Though not an exact match, the gender breakdown of survey participants is roughly similar with 28% female and 72% male respondents. 97% of the respondents fall into the age range for an adult, which aligns well with the targeted population of this survey. The largest discrepancy exists in alignments concerning country of origin. The Afghan refugee community is currently the largest group living in Indonesia, making up 56% of all registered refugees, but only accounted for 27% of survey respondents. The Somali community, on the other hand, is overrepresented at 33.3% compared to its registered share of 10%. These demographic data points have been outlined in Figure 6, Figure 7 and Table 1.

Figure 6: UNHCR Data on Refugee Population in the Context of Survey



Note: Elderly – Above the age of 59/Children – Below the age of 18

Source: Authors and UNHCR, September 2019

After careful consideration of the discrepancies mentioned above, we decided for this analysis to review the collected data through a national level lens, without consideration to gender or country of origin. This decision has been made considering the corresponding policy recommendations will apply to all groups and demographics in the same manner. The following outputs also include the small amount of cases of individuals reported under the age of 18 as well as those over the age of 59 as the statistical effect of the group under 18 is extremely limited and the potential economic contributions of those over the age of 59 should be considered under the assumption that these individuals would also have the desire to work.

Figure 7: Percentage of Surveys Collected by Country of Origin

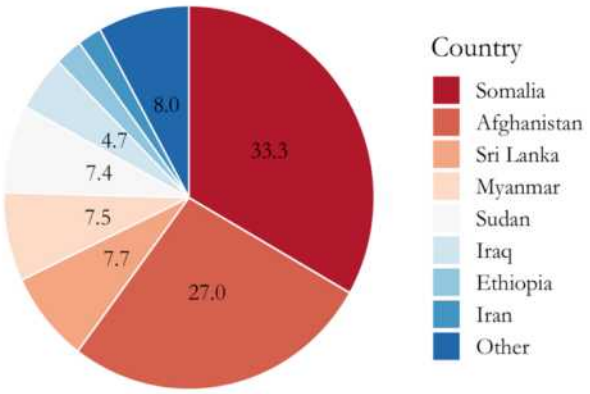


Table 1: Comparison of Country of Origin Data

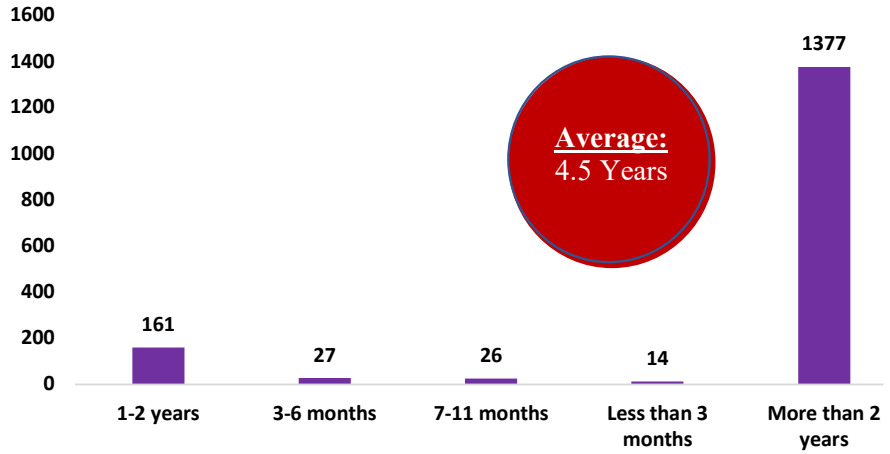
Country	% of Refugee Population	% of Survey Response
Afghanistan	56%	27.0%
Somalia	10%	33.3%
Iraq	6%	4.7%
Myanmar	5%	7.5%
Sudan	4%	7.4%
Sri Lanka	3%	7.7%

Source: Authors and UNHCR Data, September 2019

4.3. Income and Expenses in Indonesia

Several of the primary findings of the survey focused on estimates of the average income and expenditures of the refugee population. An aggregation of this data provides important insights into the quality of life of refugees in Indonesia and the means by which refugees are being supported during the stay in the country. Considering an overwhelming majority of those surveyed reported having lived in Indonesia for over two years, with the average being 4.5 years, policymakers must gain a quantitatively driven context to how refugees are currently being impacted by and impacting their local economies (Figure 8). The livelihood that the refugees currently maintained can be compared to the incomes they received prior to arrival in Indonesia as a show of changes in livelihood quality and ability to contribute to local economic growth. Note that the income and expense figures were placed into context based on reported household size. By dividing each person's reported income and expense by their household size, the research is able to achieve a comparison that better considers the dependents that each reported income supports.

Figure 8: Current Length of Stay in Indonesia



Source: Authors, September 2019

Furthermore, other indirect factors were reviewed, such as the respondent's living situation and source of income. Though a portion of the population receives some international organizational assistance or other assistance, a large number of refugees do not receive this direct cash support. In terms of living conditions, a majority of refugees (between 8,000 and 8,800 individuals) live in some form of government or international organization provided housing and therefore do not need to consider housing as an expense. This same group typically receives some amount of stipend but often at a lower than the average amount (International Organization for Migration Indonesia, n.d.). While nearly all survey respondents in Medan and Makassar lived in IOM housing, DKI Jakarta saw only a third of its respondents living in IOM housing with over 100 stating that they were homeless. In terms of comparison to the nationally observed proportion, the 71% of survey respondents who reported living in IOM housing is slightly higher than the 62% of refugees who actually live in IOM housing.[4]

Since an overwhelming majority of refugees have reported living in IOM housing and this is relatively in-line with the actuality of the current situation of refugees, it is safe to assume that the housing situation is accurately represented in the other various scenarios and that this variable will not skew our data in one direction or the other (Figure 9 and 10).

[4] Note: Refugees live in accommodation not governed by the Indonesian government. Mention of public assistance means funding from international organizations and non-profits.

Figure 9: Type of Current Housing

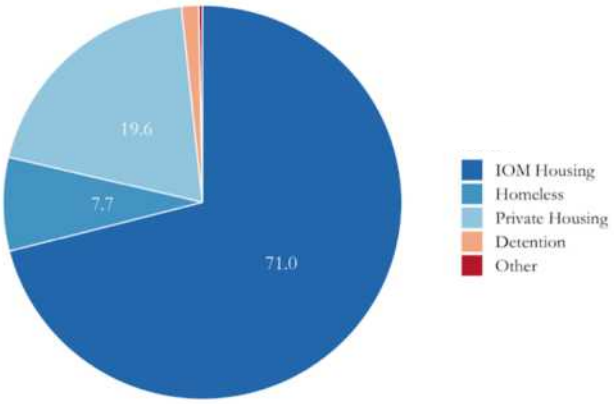
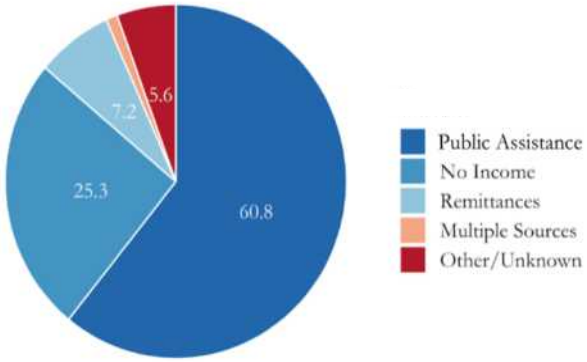


Figure 10: Primary Income Type



Source: Authors, September 2019

Because the income and expense comparisons are crucial for a thorough understanding of the refugee condition in Indonesia, a more granular breakdown of this comparison was necessary. Ultimately, the following three scenarios were set side-by-side to study how income and expense numbers varied by income source and housing type:

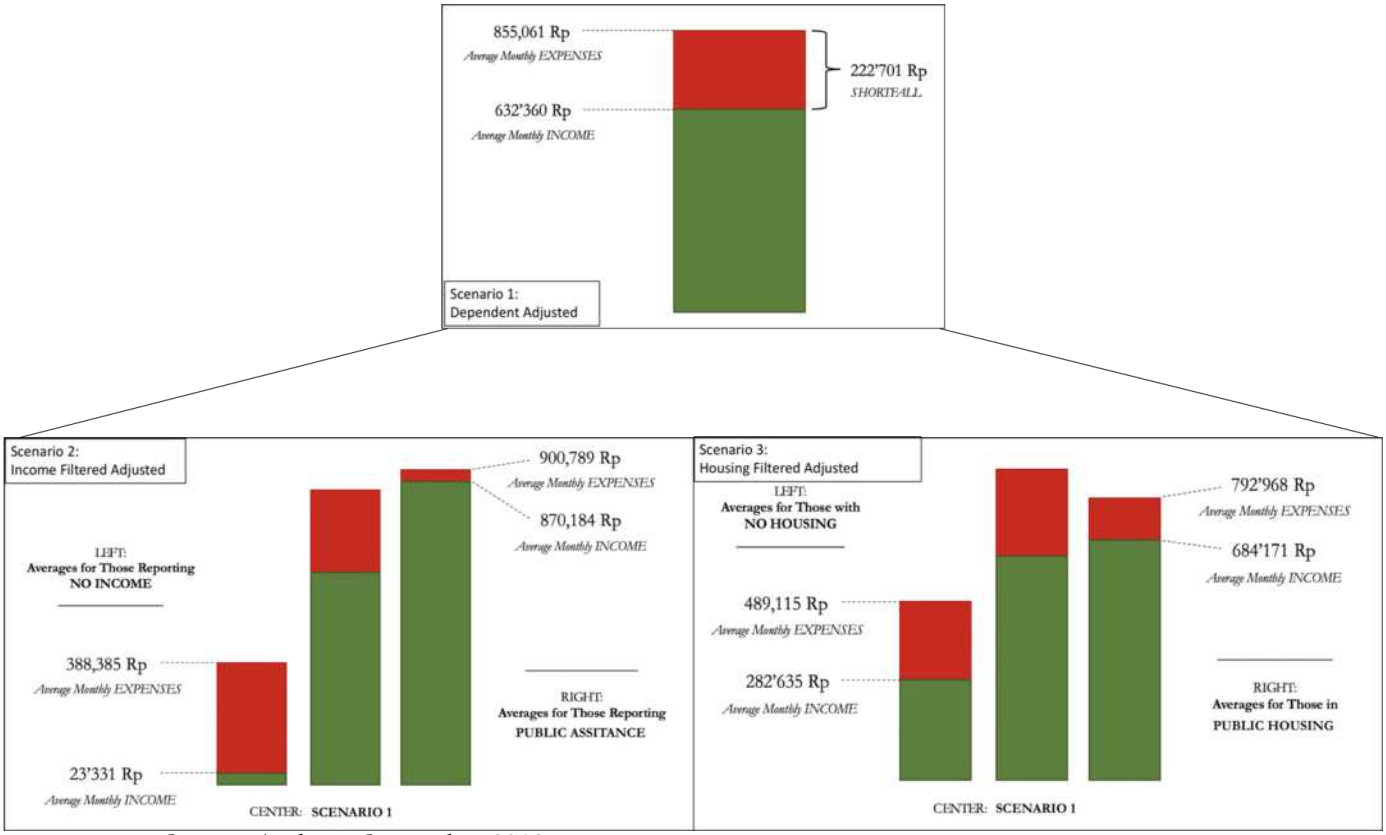
1. Individual reported incomes adjusted for dependents[5]
2. Individual reported incomes adjusted for dependents and filtered by income source
3. Individual reported incomes adjusted for dependents and filtered by housing type

The resulting analysis shows that the average refugee runs a deficit in his or her monthly budget of IDR 222,701. Those who receive financial assistance have a much smaller share of deficit spending, while those who receive no financial assistance have a debt burden that is IDR 165,684 greater (Figure 11). According to the 2018 national poverty line for Jakarta, those receiving aid fall slightly above the listed IDR 578,000 (Fitriani, 2018) per month cut off. However, this figure has been called into question by many, who believe it is too low (Renaldi, 2018). A better comparison would be to the minimum wages set for DKI Jakarta, Medan, and Makassar. In DKI Jakarta, the minimum wage is IDR 4,276,349 per month followed by IDR 2,303,403 and IDR

[5] Note: Dependent is equivalent to household size. This was determined to be the individual plus the reported number of children and if there was a reported spouse. The average household is 2.5 people with 859 single households reported and 726 dependent households.

2,860,382 per month in North Sumatra and South Sulawesi, respectively (Gideon, 2019). Using the provincial minimum wages as a means of comparison and assuming that a majority of those receiving minimum wage payments also have limited or shared housing costs, it is clear that current incomes are not enough for a refugee to maintain an adequate standard of living. Even with the provided aid, refugees still stand well below the average household standard of living in Indonesia (OECD, 2017). Note that this does not suggest that payments at the minimum wage are required to maintain adequate standards, as it has also been reported that many Indonesian workers are employed on short-term contracts, which place them below the minimum wage, but above the poverty line (Allen, 2016).

Figure 11: Income and Expense Scenarios



Source: Authors, September 2019

At the same time, these figures demonstrate that under current conditions, refugees are already contributing to the growth of the Indonesian economy. The aid that refugees receive from international organizations — aid that reaches a majority of the refugee population in varying

degrees (International Organization for Migration Indonesia, n.d.) — is entirely reallocated to the consumption economy of Indonesia through their living expenses. However, the sustainability of refugee economic contributions based on the foundation of international organization contributions is inherently unsustainable. International organization funding is constantly at risk and is held at the whims of other nations' monetary contributions to the global system of international support. To safeguard against the volatility of this external support, the Indonesian government could help take on the cost burden currently carried by international organizations for housing and living costs. Such a policy would ensure not only the continuity of direct economic contributions from the refugee community but also a path toward self-sustaining temporary employment and livelihood opportunities for refugees. Formulating this policy should, therefore, be a top priority.

4.4. Occupation Held and Educational Obtainment Prior to Arrival

To inform policy recommendations for potential paths to educational attainment and workforce integration, data was also collected about refugees' educational levels and occupational roles prior to their arrival to Indonesia. Respondents were asked from several listed choices to state their sector of work, and also to describe their previous occupational title and income. These choices were crafted using the International Labour Organization's guidelines for labour markets and employment.

The responses, listed in Table 2, highlight the largest sectoral occupation, which was Student, accounted for approximately 25% of those surveyed. With such a large share of individuals indicating that they were students, the need for continued educational resources is evident. The second and third largest sectors reported were Community, Social, and Personal Services, with a 15.6% share, and Retail and Wholesale trade, Restaurants, and Hotels, with an 11.4% share. The Construction and Agricultural sectors each contributed an 11.0% share while the remaining sectors (Transportation, Storage, Communication; Mining and Quarrying; Manufacturing; Finance, Insurance, and Real Estate; Electricity, Gas, and Water) represented a further 12.2%, with the Transportation, Storage, Communication sector being the largest. The two remaining groups were

those that reported being unemployed previously and those that did not clearly report a sector of work. These two groups combined represent 13.5% of those surveyed.

On average, as outlined in Table 2, all sectors report higher earnings in their home countries than those who currently received funding from any form of assistance. The overall average earning for the entire survey population was IDR 4,925,668 per month. Assuming the cost of living between Indonesia and the respective countries of origin is nearly the same, it is evident that these refugees were able to obtain a substantially higher standard of living in their home countries (World Bank, 2019). This data also shows that the refugees in Indonesia possess the ability to positively contribute to the local economy as they did in their home countries by creating jobs for the general population. Refugees, as mentioned earlier, can provide significant utility in expanding the export of Indonesian goods which is demonstrated by a significant share of individuals who have experience in wholesale trade. Others can engage in their respective entrepreneurial enterprises such as accounting, food vending, tailoring, and shop-keeping. Professions such as these, outlined in Table 3, can be incorporated into the official markets and collected upon for tax revenue.

Table 2: Respondents per Sector and Average Monthly Income (IDR) in Home Country

Former Employment Statistics of Those Surveyed		
Sector of Work	# of Workers	Average Income
Agriculture, Forestry, Hunting and Fishery	176	2,762,615
Community, Social and Personal Services	240	1,960,762
Construction	174	3,779,897
Electricity, Gas and Water	24	5,234,550
Financing, Insurance, Real Estate	26	9,302,389
Manufacturing Industry	37	5,568,616
Mining and Quarrying	8	3,599,814
Retail & Wholesale Trade, Restaurants, and Hotels	202	3,179,502
Student	393	907,467
Transportation, Storage and Communication	109	3,804,323
Unemployed	202	566,066
Unknown	14	1,396,836

Source: Authors, September 2019

It is important to note here that the refugee population holds a vast array of occupational skills and titles. The largest concentration of a single occupation does not exceed 100 reported responses, meaning that when scaled to the size of the entire population, no more than approximately 600 individuals would share any one field. This low number further emphasizes the point that allowing these refugees to join the workforce would cause little to no labour market disruption.

Table 3: Further Breakdown of Employment Statistics

Occupation	Workers	Avg Income
Farmer	98	3,546,918
Fisherman	22	615,872
Accountant	13	3,238,013
Real Estate Rep.	3	3,093,235
Retail Shop Owner	64	3,991,724
Trader	17	7,870,201
Entrepreneur	16	2,228,897
Retail Employee	8	2,666,613
Chef	8	2,490,426
Restaurant Employee	8	827,480

Sector of Work	Workers	Avg Income
Agriculture, Forestry, Hunting & Fishery	176	2,762,615
Community, Social & Personal Services	240	1,960,762
Construction	174	3,779,897
Electricity, Gas and Water	24	5,234,550
Financing, Insurance, Real Estate	26	9,302,389
Manufacturing Industry	37	5,568,616
Mining and Quarrying	8	3,599,814
Retail & Wholesale Trade, Restaurants & Hotels	202	3,179,502
Student	393	907,467
Transportation, Storage & Communication	109	3,804,323
Unemployed	202	566,066
Unknown	14	1,396,836

Occupation	Workers	Avg Income
Teacher	58	1,786,599
Domestic Helper	18	383,219
Tailor/Seamstress	18	1,630,193
Healthcare Worker	12	3,460,594
Social Worker	9	1,456,627
Hairdresser/Stylist	7	331,777
Photo/Videographer	6	1,027,158
Driver	65	2,336,652
Journalist	6	26,705,666
Computer Engineer	5	1,078,504
IT Technician	5	9,625,548

Source: Authors, September 2019

The second indicator in this section collected information about the educational attainment of refugees. Compared to the Indonesian population, there are also significant opportunities for refugees to engage in portions of the job market without creating competition through common skills or knowledge (Table 4). These educational obtainment levels are relatively consistent for the general population of survey respondents as well as those that indicated wanting to seek educational opportunities or having listed prior occupation as a student (Figure 12).

Table 4: Completed Educational Obtainment as Percentage of Respective Samples[6]

Indonesian Market (25 and older)	**Survey Reported Data**
Upper secondary: 34.601%.	Junior High: 41.5%
	Junior College: 8.3%
Bachelor's Degree: 9.374%	Bachelor's Degree: 7.3%
Masters: .614% and PhD: .05%	Further Education: 4.6%

Source: Authors, September 2019 & World Bank, Education, 2019

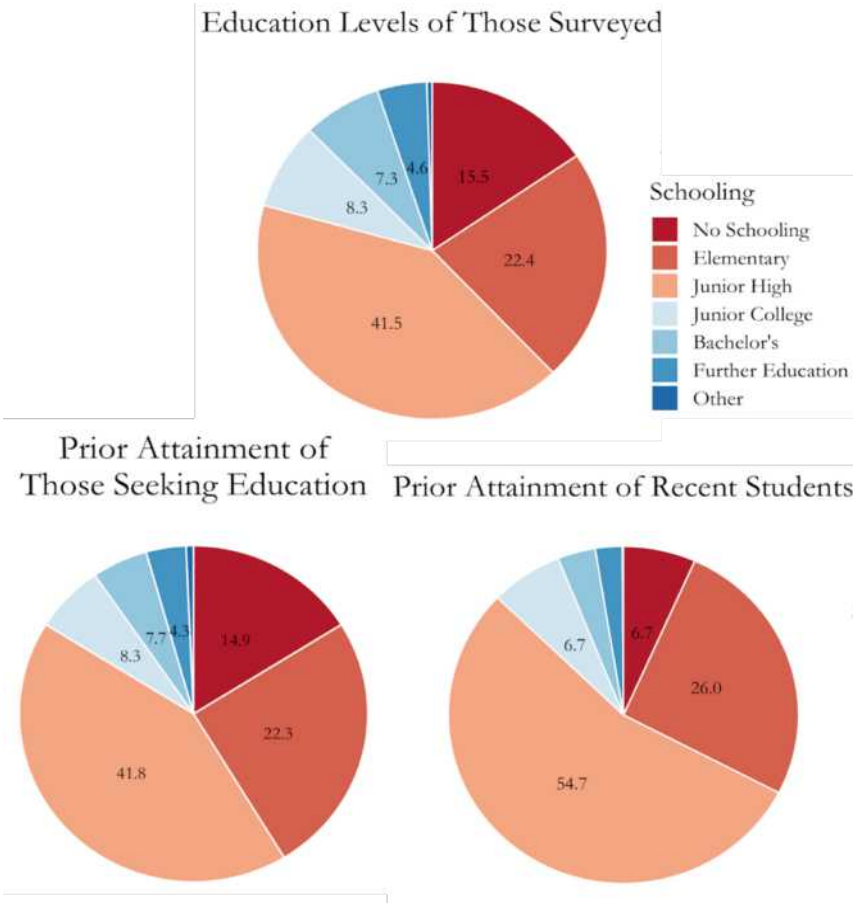
While 35% of the Indonesian population has completed a lower secondary education, 41% of the refugee population has obtained this educational milestone. However, at the university level, a larger share of the Indonesian population has completed a Bachelor's degree compared to the refugee population. At the highest level of educational obtainment, the refugee population significantly has a larger share of those who have received a Masters, PhD or some other form of further education.

This educational make-up should pose little to no issues when temporarily allowing the refugee population access to the labour market (Adiputera, & Prabandari, 2019). According to the World Bank Surveys, the highest rate of unemployment in Indonesia is among tertiary graduates and senior secondary graduates, while non-educated labourers are relatively well-absorbed into low-skilled jobs (World Bank, 2014). The entry of refugees into the low-skilled job market when there is competition will also be limited by the language advantage of locals over that of the refugee and asylum seeker population (Dadush, 2017).

[6] Note: Junior High – Completed middle school but not high school (both technical/educational)
Junior College – Completed high school up to an associate's degree (both technical/educational)
Further education – Any degree awarded beyond a bachelor's degree (i.e. Master's, PhD)

Any evaluation that considers both the occupational and educational characteristics of the refugee community will be able to conclude that there is opportunity for the refugee population to positively impact the local labour environment. The added improvement to the livelihood of refugees would be extremely large and the reduction of the cost burden to the Indonesian government would be substantially reduced. Conversely, refugees left in limbo for protracted periods would result in higher fiscal costs and their contribution to the local economy would be smaller (Dadush, 2017).

Figure 12: Education Levels of Respondents Based on Various Scenarios



Source: Authors, September 2019

Interestingly, The Asian Development Bank has reported that the Indonesian labour market is characterized by a slow growth in the job market and a high level of incompatibility with the

demands of the labour market. The Indonesian economy has seen a decline in the informal economy and the growth of individuals seeking formal opportunities (Allen, 2016). Unemployment in Indonesia has declined and steadied around 5% from 2005 (ILO Office for Indonesia and Timor-Leste, 2017) levels with a continued slight declining trend. Underemployment remains a consistent problem with the largest share of unemployment occurring for those with Bachelor's degrees (Moody's Analytics, 2019). Economic growth has been solid at around 5% per year since 2013, macroeconomic policies are finely balancing growth and stability, and GDP growth is projected to remain healthy. Educational attainment has increased, but a scarcity of skills is holding back growth and incomes (OECD, 2018).

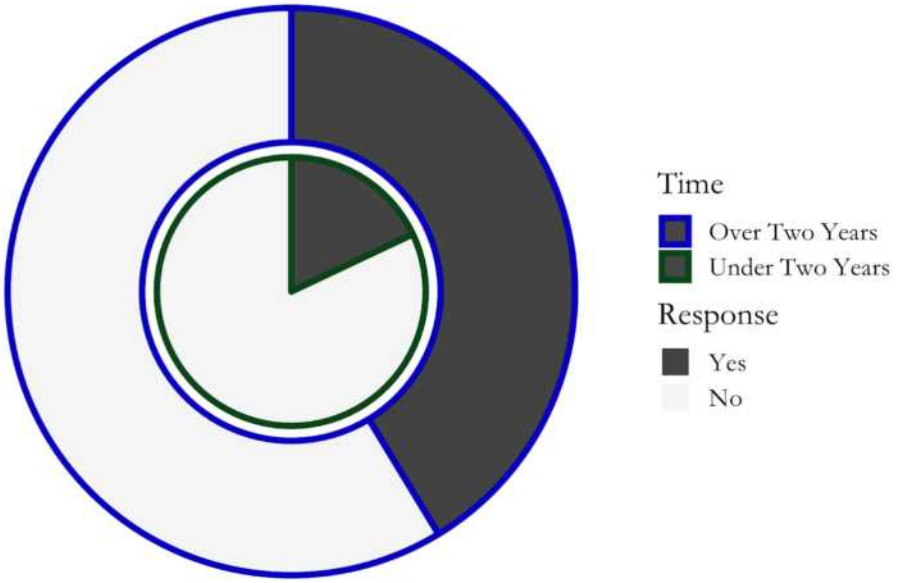
A significant share of refugees, based on the findings of this survey, is likely to be entrepreneurs or small business owners. Based on an Australian Bureau of Statistics study of migrants settled in Australia between 2009-2010, the businesses that migrants established in Australia have been reported to grow to the extent that their incomes are greater than or equal to that of expatriates (Australian Bureau of Statistics, 2017). These formal businesses would not compete with the desires of those with Bachelor's degrees seeking employment opportunities. Likewise, someone holding a Master's or PhD degree would be seeking a different type of occupation that would not overlap. On the other hand, the large share of individuals in the refugee community who do not hold a high school degree would also fare well by being able to seek business opportunities within the informal job market without the fear of arrest (Kusmayadi, 2016). for doing so, similar to many Indonesians. Since the informal economy is shrinking, there is room for growth and opportunity for refugees to support the foundation of this shrinking part of the economy (Adiputera, & Prabandari, 2019).

4.5. Reported Languages and Technical Skills

As noted above, the local population has and will always maintain an advantage over the refugee population in its language capabilities. However, this dynamic does not equate to the refugee population not knowing *Bahasa Indonesia* at all. When surveyed about the number of languages spoken, an overwhelming majority of 81.7% reported speaking at least two languages, 50.3% reported speaking three languages, and 23.7% reported speaking four languages. Of the total population, 70% reported one of these languages being English, and 38% reported one of these languages being *Bahasa Indonesia*.

Evaluated over time, the data demonstrates that the refugees who have been in the country for over two years have demonstrated a substantial capacity for learning *Bahasa Indonesia*. Of those who have arrived in Indonesia in the past two years, approximately 15% reported knowing *Bahasa Indonesia*. However, amongst those who have lived in Indonesia for over two years, approximately 45% reported knowledge of the language (Figure 13). The higher level of reported proficiency shows that refugees are trying to learn the language. Additionally, the high degree of English proficiency also offers many refuges to work in international settings and industries that could potentially contribute to the building of international business networks that Indonesia will need to further increase exports and international commerce opportunities.

Figure 13: Improvement of Bahasa Indonesia Based on Time Spent in Indonesia



Source: Authors, September 2019

Beyond the usefulness of *English* and *Bahasa Indonesia*, there exists a high degree of opportunity for refugees to teach others their native languages. With a large share of the refugees speaking Arabic, Farsi, Tamil, and Somali, there is the opportunity for an Indonesian person wanting to learn these languages to do so with a native speaker. Table 5 below highlights the reported degrees of proficiency in *Bahasa Indonesia, English*, and *Arabic* on a numerical scale of 1 – beginner, 2 – intermediate, 3 – advanced, 4 – fluent, and 5 – native speaker. The results reveal a medium degree

of proficiency in *Bahasa Indonesia* and *English*, two languages required for work and socialization – refugees have the language skills required to begin working, and need opportunities to continue building these skills. Meanwhile, the relatively high degree of proficiency in *Arabic* indicates the language skills required to facilitate new foreign trade and to help teach others *Arabic* or facilitate lessons for those learning *Bahasa Indonesia* and *English* .

Table 5: Selected Language Proficiency of Respondents

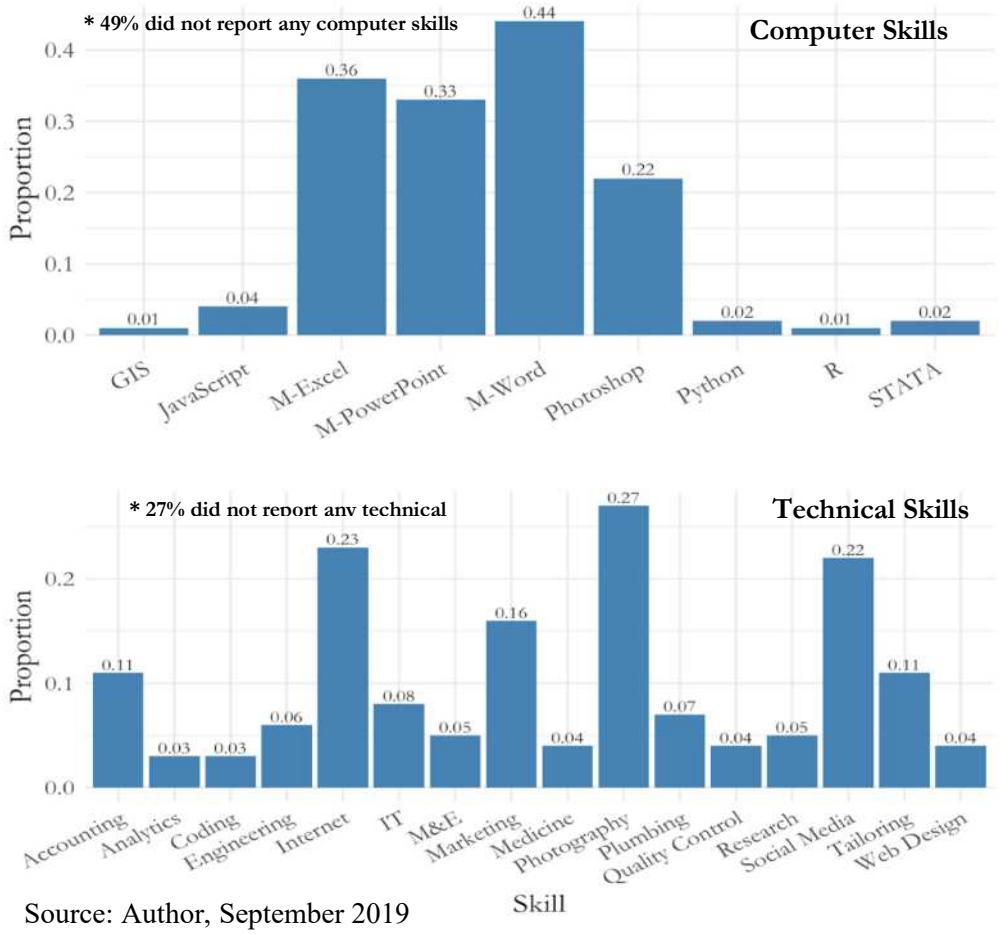
	Speaking	Listening	Reading	Writing
Bahasa Indonesia	2.23	2.30	2.15	2.10
English	2.69	2.74	2.77	2.67
Arabic	4.03	4.05	3.96	3.94

(Scale from 1-5, where 1 is Beginner and 5 is Native Speaker)

Source: Authors, 2019

Beyond language skills, there is a significant share of individuals with various computer skills, technical skills, and trade skills that demonstrate the ability of refugees to operate their respective businesses or to be valuable contributors to others.

Figure 14: Respondent Computer and Technical Skills



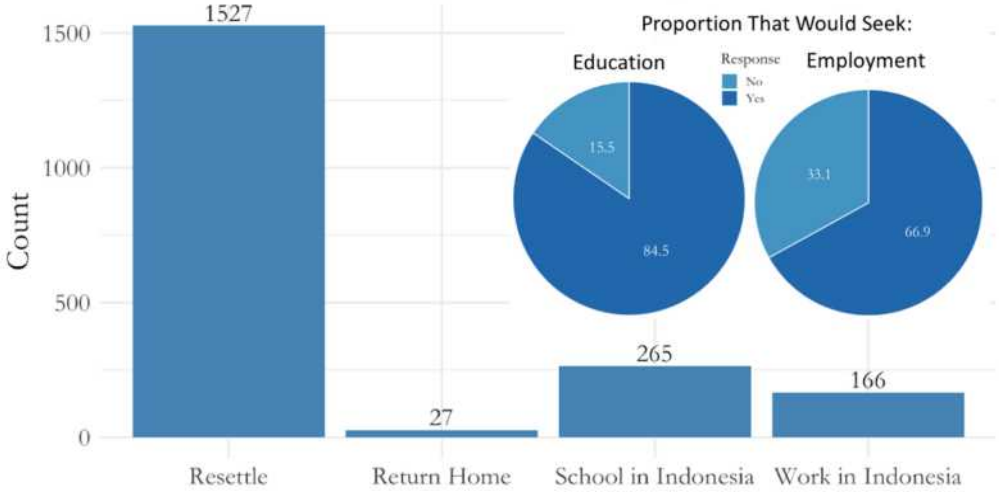
Source: Author, September 2019

44% of respondents indicated proficiency in Microsoft Word, with 36% and 33% indicating proficiency in Microsoft Excel and PowerPoint, respectively. In the realm of more creative opportunities, 27% of respondents know photography, 23% know how to use the Internet, 22% indicate knowledge of social media, and 22% of respondents indicate the ability to use Photoshop. The low percentage indicated for commonly used resources such as the Internet may be attributed to the perception that basic internet usage is not a reportable skill. However, it is important to emphasis to individuals that this is a sought-after trait in the field of employment. Outside of the creative industry skillset, 11% of respondents indicate having technical skills in accounting while 11% also indicate having technical skills in tailoring (Figure 14).

4.6. Future Plans

Respondents in the final portion of the survey were asked three questions pertaining to their future intentions and priorities. Two questions were 'Yes or No' questions and the third question provided respondents the ability to select multiple options to observe preferences of options once proposed side-by-side. Upon review, 84.5% of respondents indicated their desire to seek a higher education, while 66.9% indicated the desire to seek employment opportunities (Figure 15). However, when respondents were given the option of resettlement alongside educational and employment opportunities, with the ability to select multiple options, the opportunity for resettlement was overwhelming selected by almost every survey participant.

Figure 15: Respondent Future Plans and Goals



Source: Author, September 2019

Based upon these results, it is clear that the refugee community seeks *temporary* employment and educational opportunities. Therefore, the solutions that are proposed to manage the refugee population must take into consideration previous employment, degree of education, and learned skills within the context that the stay of the refugee population is temporary until confirmed resettlement.

5. *POLICY RECOMMENDATIONS*

Simply put, allowing access to work can lower the vulnerability of refugees and improve their overall quality of life. This inability to work has resulted in both mental and physical health problems that are compounded by the overall experience of forced displacement (IOM, 2019). As reported in one of Sandya Institutes' focus group discussions, the current life of a refugee is that of "an animal; all we do is wake up, eat, and go to sleep. We are not allowed to be productive and it is not good for our minds to be forced to do nothing (Sandya Institute, 2019)."

Being able to secure work and educational opportunities without discrimination, without the fear of arrest, and without the consequences of exploitation are vital to creating an existence that is ethically justified for populations of concern. Failure to develop a framework to quell these issues will prevent refugees from being to improve their standard of living and put the Indonesian government at the constant risk of being left with the costs of managing the refugee population if international organizations stop their current operations.

However, there is a viable means for allowing refugees to seek educational and employment opportunities without disrupting the growing Indonesian economy. The negligible size of the refugee population, in comparison to the overall size of the Indonesian labour force, makes the likelihood of any negative impact very low. However, a thing of concern is that refugees who enter the informal sector are prone to labour exploitation because, unlike locals, they do not have recourse to authorities such as the police when violations happen. As highlighted in this research, the skillsets of the surveyed population do not directly compete with the unemployed population in Indonesia. Furthermore, the skillsets of refugees can coexist and contribute positively to the economy of Indonesia and the overall vision for future economic growth. With this in mind, and taking into consideration the current policy environment, Sandya Institute has proposed several areas of focus for a framework supporting temporary refugee livelihood opportunities.

1. **Temporary Employment Framework**
    a. **Apprenticeship opportunities (Government-led action)**
    b. **Individually-run business opportunities (Government-led action)**
    c. **Training and vocational improvement programs (NGO-led action)**
2. **Temporary Education Framework**
    a. **Non-governmental and International Organizations:**

i. **Learning centre standardization and cooperation**
ii. **Language and General Education Development (GED) training**

b. **Government-Led Action:**
i. **Integration of refugees into institutions of higher-learning**

Though they primarily focus on government-led actions, NGOs will take an important role in implementing and ensuring the success of government-enacted policies.

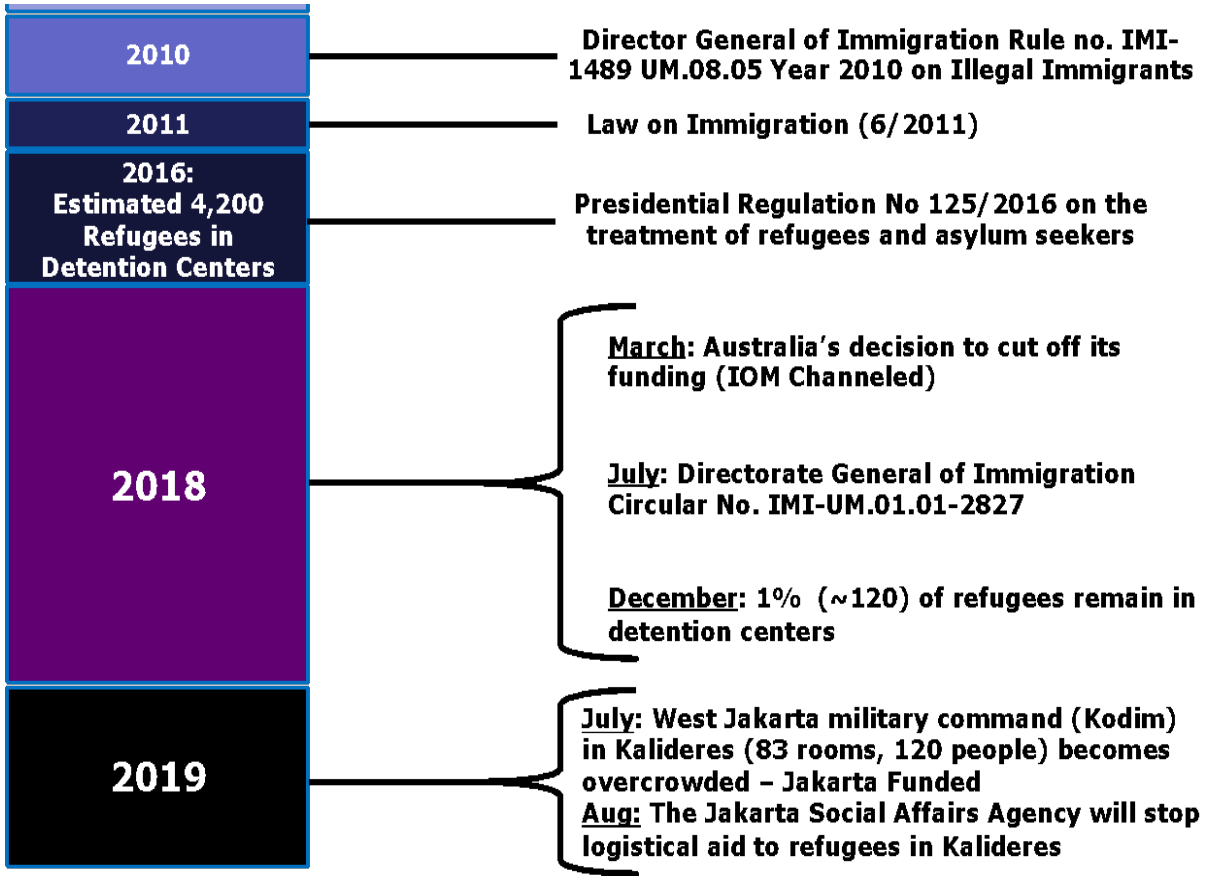
5.1. Current Policy Environment

Due to the low amount of exposure and attention from the Indonesian public to the issues of refugees and UNHCR's limited capacity in a volatile geopolitical world, refugee status determination and resettlement is a long and arduous process. Indonesia's policy of not accepting permanent settlement of refugees is also hindering efforts of integration or return. The current framework for refugees is very limited, as a lack of law governing the protection of refugees has increased confusion as to how the crisis should be addressed. Current policy frameworks such as those developed under the Law on Immigration (6/2011) (The House of Representatives of Indonesia, et al., 2011) conflate refugees and other immigrants. Executive rules such as Director General of Immigration Rule no. IMI-1489 UM.08.05 Year 2010 on Illegal Immigrants (SUAKA, 2019) develops protections for refugees from immigration violations that apply to illegal immigrants. While the Presidential Decree 125/2016 (Tobing, 2019) created an initial outline for a refugee management mechanism. Under this Decree, refugees and asylum seekers fall under the same definition (UNHCR Indonesia, 2019), "as foreigner[s] who reside within the territory of the Republic of Indonesia due to a well-founded fear of persecution." This definition serves as a first step in creating a system for refugees that provide preliminary protections and reduces the likelihood of arbitrary refoulement. Furthermore, the definition and decree encourage for the division of responsibilities, which is vital to creating efficient policy mechanisms (Tobing, 2018). However, this does not discuss policies pertaining to adult education, trainings, or other livelihood activities. Refugees remain dependent on monthly stipends from UNHCR or IOM, which have no guarantee of long-term continuation and are far from providing what is necessary to meet basic needs.

With no other nation in ASEAN (besides the Philippines) allowing refugees to seek opportunities in the labour market on a non-trial basis, Indonesia can continue to serve as a leader

in the region by adopting a comprehensive temporary labour integration framework. Not only will this serve the purposes of Indonesia's leadership within ASEAN, it will take into consideration that refugees will be in Indonesia for an extended stay due to the unpredictable circumstances surrounding resettlement processes and decisions (Topsfield, 2017).

Figure 16: Timeline of Major Refugee Policy Actions



Source: Authors, September 2019

5.2. Temporary Employment Framework

The ideal framework would take into consideration three types of opportunities for refugees. These opportunities will provide the possibility for refugees to actively participate in Indonesian

society during their temporary stay and allow them to prepare for their ultimate transition to resettlement countries.

1. Apprenticeship opportunities
2. Individually-run business opportunities
3. Training and vocational improvement programs

Of these three focus areas, number one and two will be further discussed as they require direct government action and directives on the ministerial level to accomplish. Proposal three initiatives should be condoned by any government authority and have been pursued (with government approval, when required) through learning opportunities lead by the non-governmental and international organization actors. Since non-governmental and international organization actors are the leading forces in proposal three initiatives, these programs are of limited concern to any proposed government action. Therefore, this report encourages the expansion and formalization of these programs but does not list any policy proposals.

In order to allow refugees to engage in apprenticeship opportunities, government directives must state that such opportunities can be pursued and facilitated by outside organizations. The definition of an apprenticeship opportunity would be a paid temporary training position within an existing corporation, university, or other place of employment. Currently, such opportunities have not been formally allowed. In such a scenario, it would be reasonable to have government-set parameters on potential pay in the position. The parameters are essential to ensure that payment is not only overly excessive and drawing from the potential opportunity of an Indonesian counterpart but also at a standard that ensures access to an independent and fulfilling livelihood. The type of employment opportunities may be limited by Indonesian policy-makers based on the need to protect what are seen as vulnerable Indonesian industries. In making this consideration, it is strongly advised that none of the following sectors are restricted: community, social, and personal services; electricity, gas, and water; finance, insurance, and real estate; retail and wholesale trade; and transportation, storage, and communication. These sectors should be paid special attention to because they allow refugees the opportunity to seek temporary employment without directly competing with Indonesians, either because of skill-match conditions or the small number of refugees in these sectors.

The second area of focus, which is individually-run business opportunities, needs to be considered in two parts. The first involves formally-run businesses and the second involves those that operate in an informal market. In order to open opportunities for refugees to operate a

business within the formal market, foreign investment requirements and in some instances foreign ownership requirements should be removed from businesses that would be temporarily based in Indonesia and are refugee owned and operated. A possible waiver of requirements would only apply to those holding a UNHCR issued identity card under the consideration that the business operations and stay in Indonesia is temporary on the condition of resettlement. The benefit of creating a pathway for formal business ownership is the ability to collect tax revenue from these businesses and for a larger positive economic impact on the local economies. Considering that many refugees worked in wholesale and trade industries in their original countries, the advantages can be numerous for expanding exports from Indonesia while developing new global trade connections. Concerning the allowance of informal business operations in the grey market, the only directive that would need to be considered is one that allows for such business to exist without fear of arrest or detainment by local authorities. Explicitly stating that business can operate in the grey market will also benefit local economies and bring a large share, if not a majority, of refugees into a position to seek self-sustaining opportunities.

Considering the framework of the Indonesian legal system, directives concerning these actions would have to stem from the Ministry of Manpower and the Ministry of Human Rights in cooperation with the currently operating cross-ministerial Refugee Task Force to identify which current law or policy this directive would best fall under. Cross-ministry cooperation is vital to ensure policy consistency and avoid overlap. It is also equally important for policy makers to communicate any federal actions through the breadth of provincial and local institutions.

5.3. Temporary Education Framework

With approximately a quarter of all respondents indicating that they were previously a student, we find it necessary to propose potential pathways towards an improved temporary education system. The primary groups of decision-makers in this sphere are non-governmental and international organizations and the Indonesian government. The remaining discussion will be divided by the proposed actions each sector should take moving forward as follows:

1. Non-governmental and International Organizations:
    a. Learning centre standardization and cooperation
    b. Language and General Education Development (GED) training
2. Government Led-Action:
    a. Integration of refugees into institutions of higher learning

Non-governmental sectors' actions in this instance are comprised of local learning centres and charitable organizations that work in cooperation with international organizations such as UNHCR. These institutions serve as the core operators in providing informal unaccredited educational opportunities for the refugee community. One of the primary shortfalls in the current system of informal education opportunities for refugees is the lack of standardization within individual institutions and across institutions in the creation of a curriculum. Institutions seeking to operate in the space of educational opportunities in Indonesia require more external communication to ensure a standardization of the quality of education amongst the refugee population. Though this research focus on educational opportunities for working-age individuals, further coordination amongst educational actors can also benefit those of younger ages. Creating a standardized curriculum across educational institutions as a point of aspiration can also ensure progressive learning instead of individuals being subjected to re-learning the same material due to changes in staff or institutional structure. The funding of these opportunities would rely on the actors opting into this space as well as international organization funding. Furthermore, a continued emphasis on language training opportunities and GED test preparation would be beneficial for a majority of individuals seeking to further education, given the current reported levels of education obtainment. These programs can create a vital pathway to greater livelihood opportunities for refugees.

The responsibilities of the Indonesian government in ensuring educational accessibility focus more on providing formal educational opportunities. Focusing on the working-age population, educational directives should help to establish a path to pursuing coursework at Indonesian institutions of higher learning. Due to the lack of credible recognition based upon their status as refugees, accredited Indonesian institutions of higher learning are currently unable to accept refugees for credited programs and opportunities. The standards that apply for international students are also currently applied to refugees; however, refugees do not have the same ability to provide the documentation that international students have to register for credited classes and training opportunities. Reviewing these requirements and outlining circumstances for refugees to register alongside Indonesians classmates would be a significant advancement in allowing refugees to engage in productive opportunities that prepare them for their resettlement and allow for positive contributions to Indonesian society. These policy changes would also require ministerial-level actions in the form of a directive to develop the standards and process for higher-level education opportunities for refugees.

6. *POLICY CONCERNS*

Concerns regarding policies focusing on livelihood improvements may cause concern for policymakers; however, these concerns should not dissuade policymakers from taking decisive and progressive actions to support this vulnerable population. Not allowing refugees to work or seek educational opportunities due to the perception that they are a national burden and competition in the workforce will only cause this population and the Indonesian government further harm. Some individual points to be made about the perception of the burden of refugees can be dispelled in the following points, bringing further emphasis to benefits stemming from the community:

1. Taxes: The government can collect taxes borne out of potential refugee wages/business.
2. Real cost burden: The cost of providing mental health care and additional supportive services would serve as a significant and real cost burden to Indonesia. If allowed to seek livelihood opportunities, this cost can be avoided.
3. Economic growth: Indonesia will miss out on new labour potentials and market expansion.
4. Sustained livelihood: Disbarring them from creating new businesses will also reduce chances for local society to receive work (Adiputera, & Prabandari, 2019).
5. Security concerns: The concern that refugees pose a threat to Indonesia's security is extremely unlikely as there are practically no cases of refugees posing a serious threat to national security.

Furthermore, concerns about creating a system that increases the "pull-factor" of refugees to Indonesia are unfounded. As seen in this survey, almost all refugees want to be resettled to a third country. It is also important to recognize that the average income of the surveyed populations demonstrates that refugees had higher salaries at similar or cheaper costs of living in their home countries. Including this fact into our evaluation, the research team can conclude that refugees in Indonesia did not come here seeking to stay in Indonesia for economic purposes. The refugees in Indonesia left their home countries due to genuine threats to their safety. All of the factors are further proven by the decreasing population of refugees in Indonesia; it is clear that more individuals are being resettled and returning to their countries than are arriving in Indonesia.

7. *GAP ANALYSIS AND FUTURE WORKS*

Future research opportunities concerning the refugee population exist within the framework of this current research survey, especially if the Indonesian government can make progress on the recommendations above. Additional questions concerning characteristics that measure livelihood

quality can be included as well as efforts to capture a larger share of the population of refugees. A greater focus on desire for socialization and including data that captures the sentiments of the Indonesian population concerning refugees can help to inform policymakers further as they seek to address this population and determine how they can coexist in Indonesian communities during their temporary stay. Additionally, future research can focus on the economic contributions of refugees that were resettled from Indonesia to a third country to estimate their economic impact under different conditions.

In regards to future research, opportunities to build upon this report and the survey that supported its creation can focus on quantitative regression analysis based on currently available data of the Indonesian labour market. Economic research at this scale can provide more evidence as to what the quantitative effect refugees in Indonesia would pose on the national economy.

Sandya Institute considers this report as the first step in a long-term effort to work in cooperation with government, private, non-profit, and community stakeholders to create nuanced and effective policy solutions. This report serves as a foundation for continued policy advocacy and coalition building to address the fundamental issues that refugees face living in Indonesia. Sandya Institute will continue to work with stakeholders and actors in this space to seek livelihood improvements.

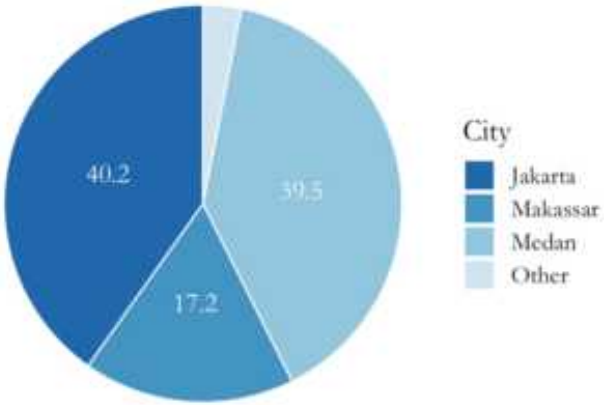
8. *CONCLUSION*

Left in waiting, the livelihood of refugees in Indonesia is one that forces individuals to live an unproductive life despite the desire to contribute to society. The problems that refugees face in Indonesia have been constant and long-lasting without significant change or improvement. As global conditions slow the process of resettlement, the time refugees must spend in Indonesia can last as long as a decade. While strides have been made to reduce the use of detention centres and to create a framework that recognizes the status of refugees, there is more that must be done to protect this population's human rights adequately.

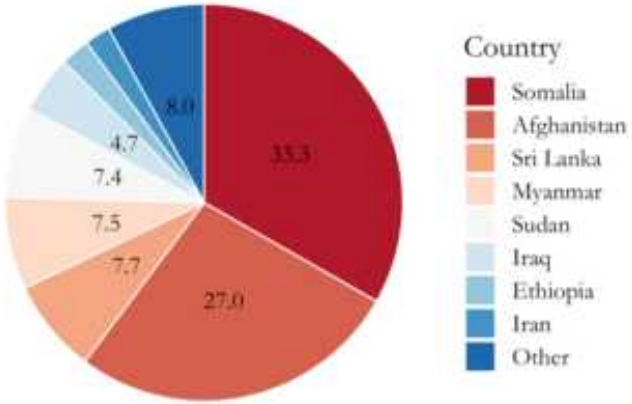
Based on the results of the survey conducted by Sandya Institute on refugee labour characteristics and this report, we can be confident that there is a viable path forward to opening livelihood activities in employment and education for refugees as they await resettlement. Opening access to these opportunities will require continued cooperation amongst refugees, non-profits, and the Indonesian government and community. These efforts are fundamental to helping a population that is already vulnerable to maintain a quality of life all human beings should have the ability to maintain.

Appendix A: Summary of Survey Outcomes for All Respondents

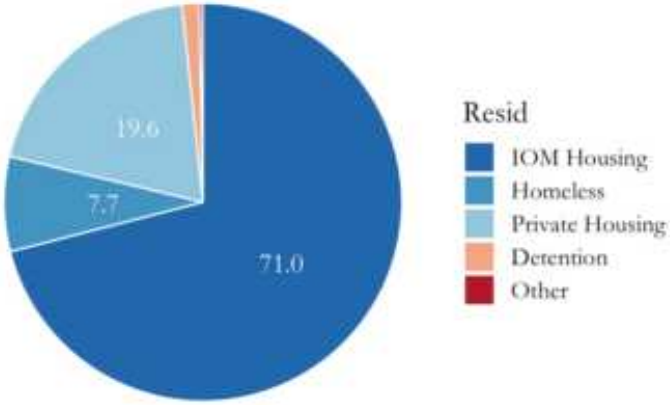
Surveys Collected By City



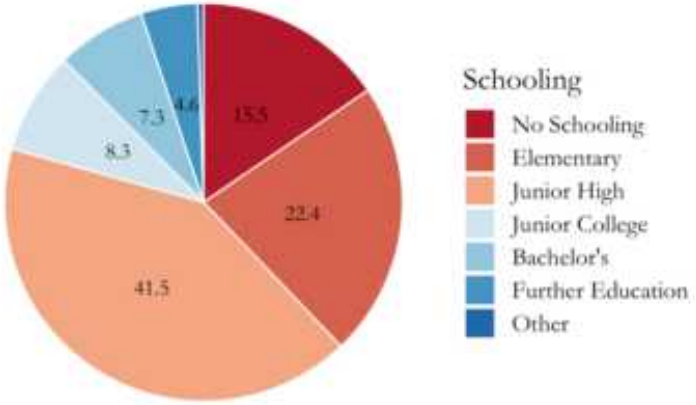
Surveys Collected By Country of Origin



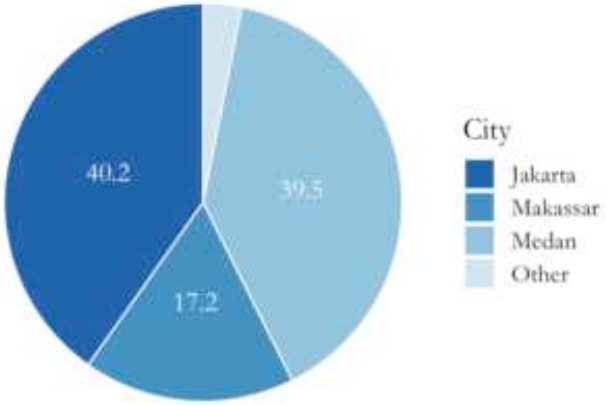
Living Situations of Those Surveyed



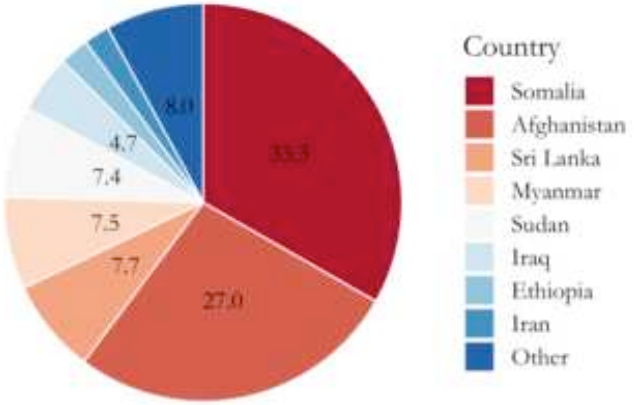
Education Levels of Those Surveyed



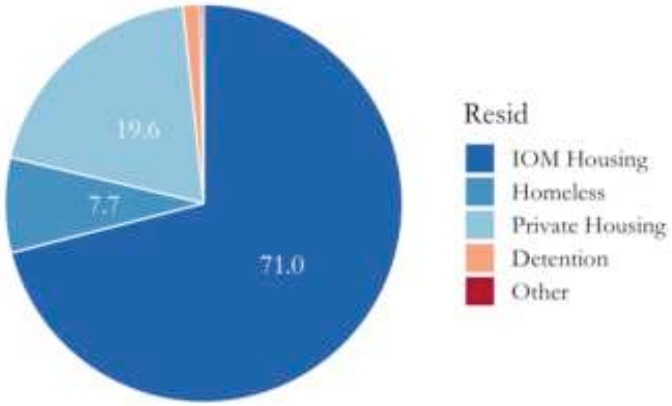
Surveys Collected By City



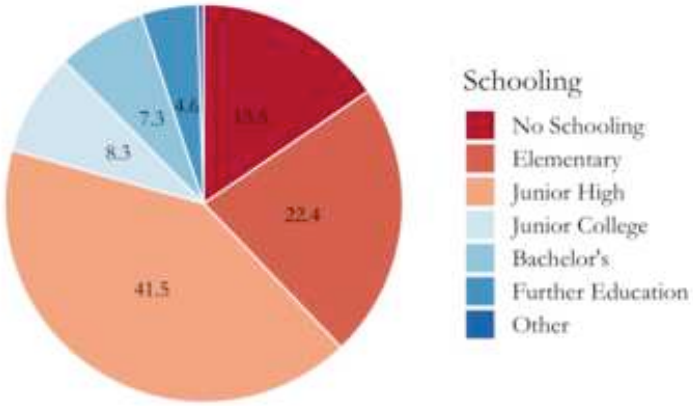
Surveys Collected By Country of Origin

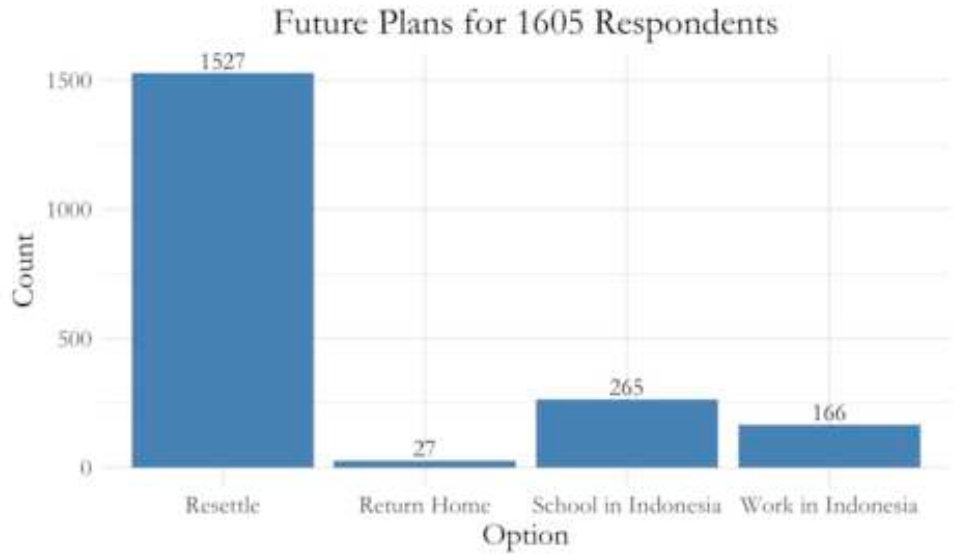


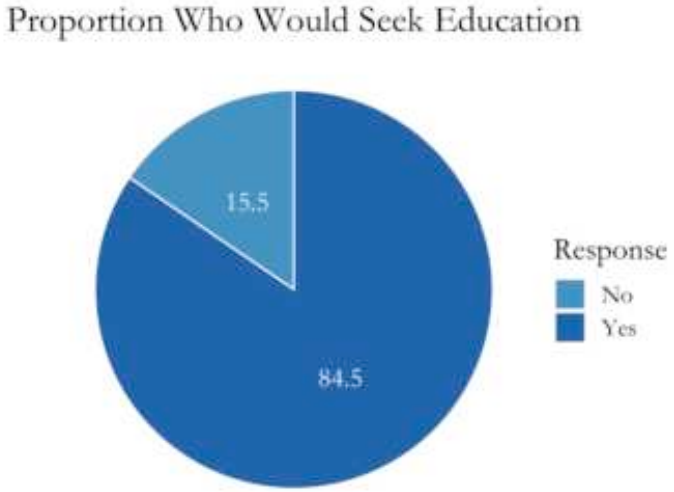
Living Situations of Those Surveyed

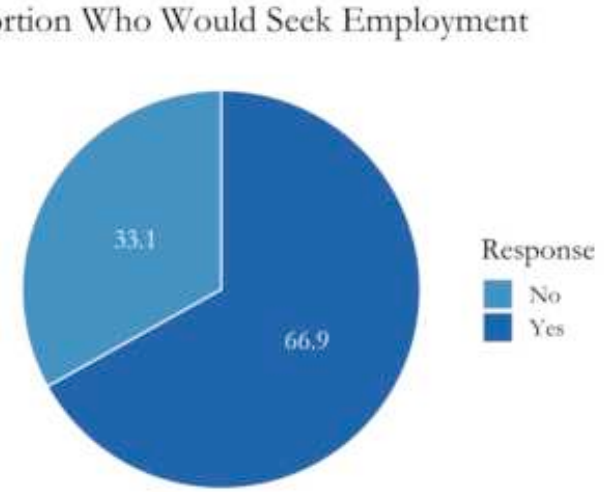


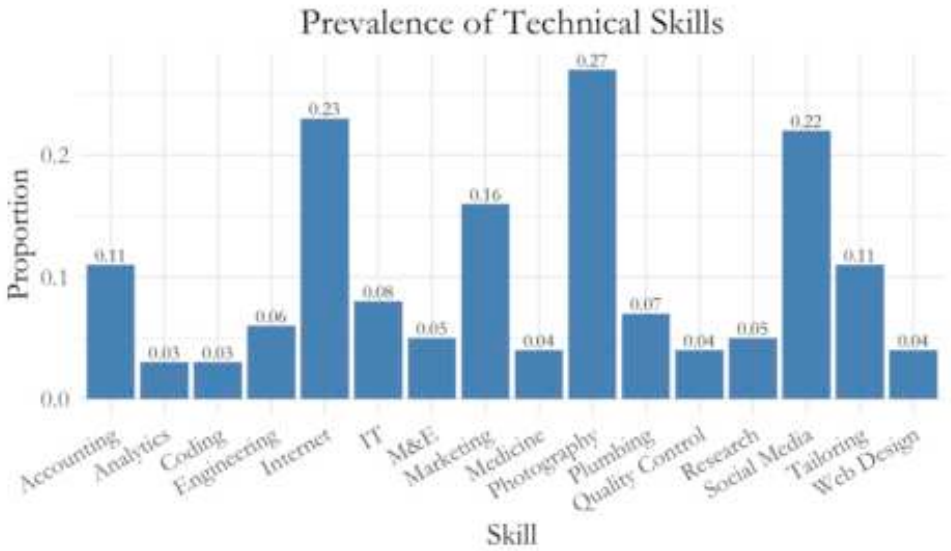
Education Levels of Those Surveyed




Future Plans for 1605 Respondents
1527
1500
1000
500
0
Count
265
166
27
Resettle
Return Home
School in Indonesia
Work in Indonesia
Option

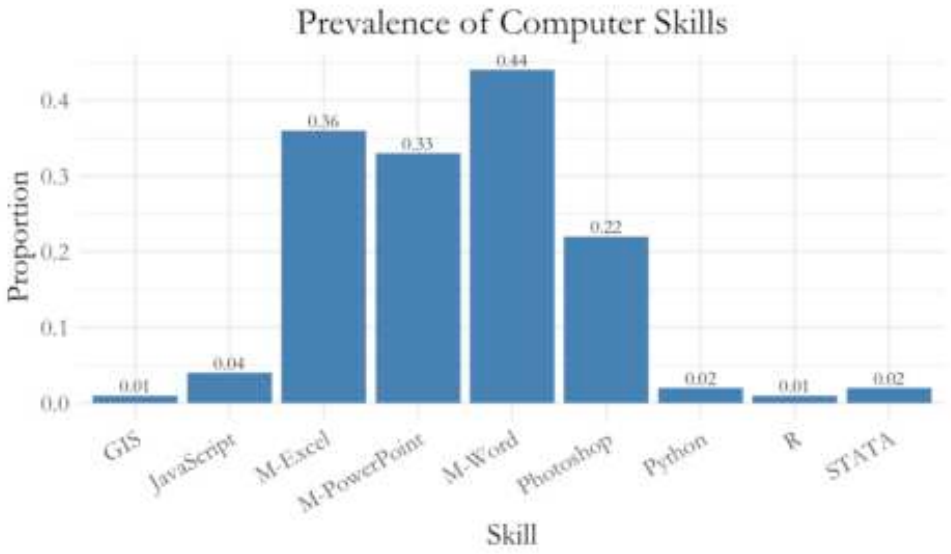

Proportion Who Would Seek Education
15.5
84.5
Response
No
Yes

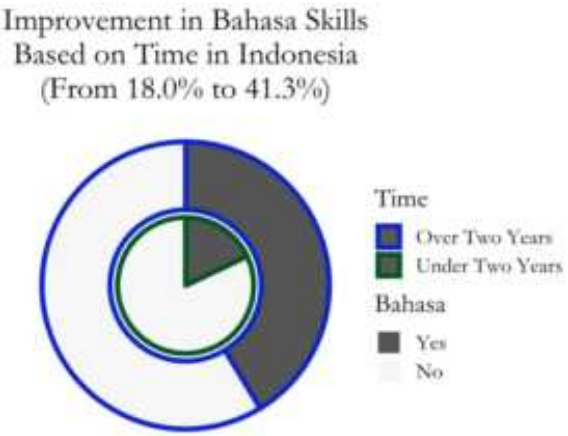

Proportion Who Would Seek Employment
33.1
66.9
Response
No
Yes

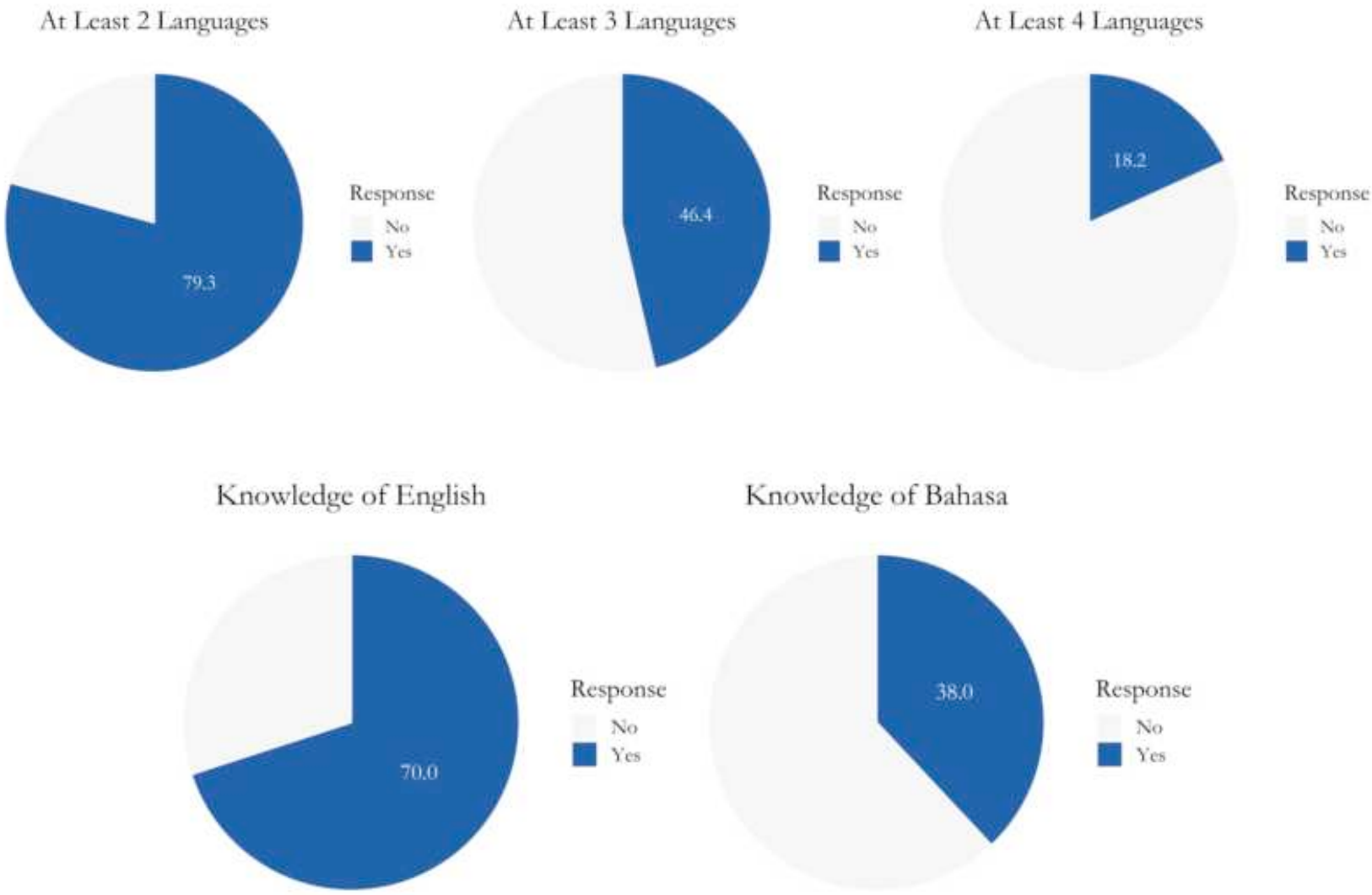


Scaled Language Proficiency of Those Surveyed

	Speaking	Listening	Reading	Writing
Bahasa Indonesian	3.23	2.36	2.15	2.10
English	2.69	2.74	2.77	2.67
Arabic	4.05	4.05	3.96	3.94



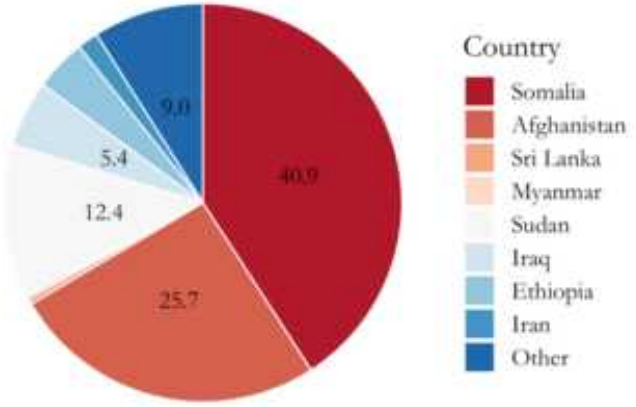




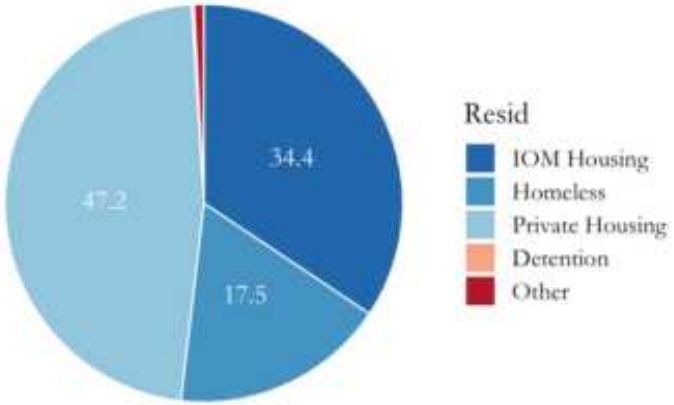
Source: Authors, September 2019

Appendix B: Survey Outcomes for DKI Jakarta Respondents

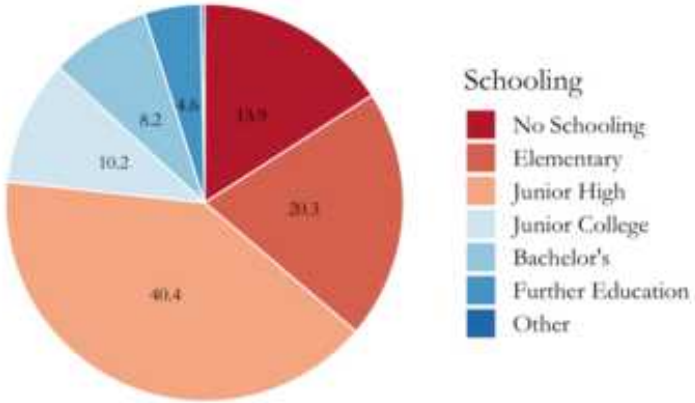
Surveys Collected By Country of Origin

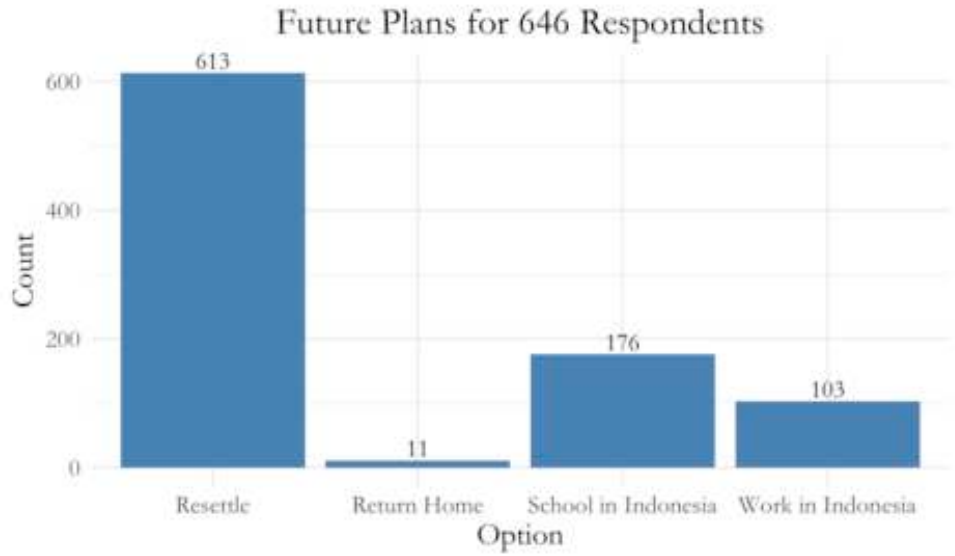


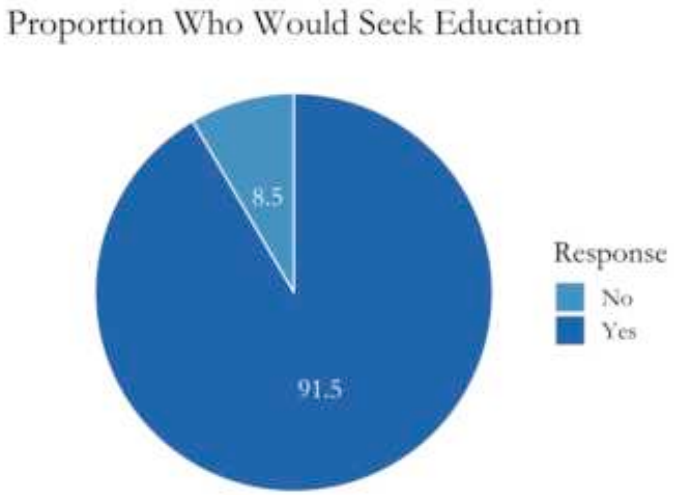
Living Situations of Those Surveyed

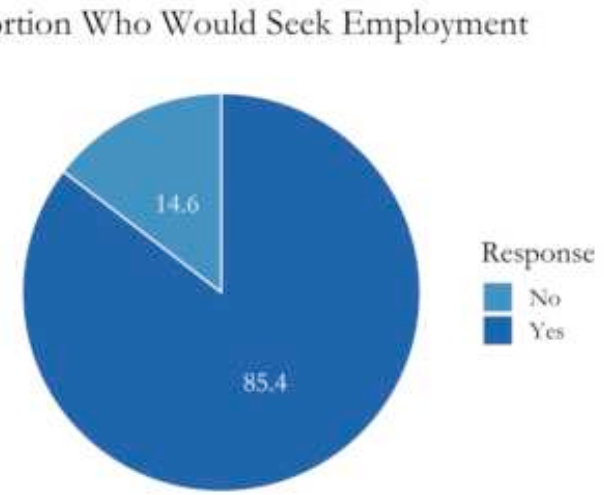


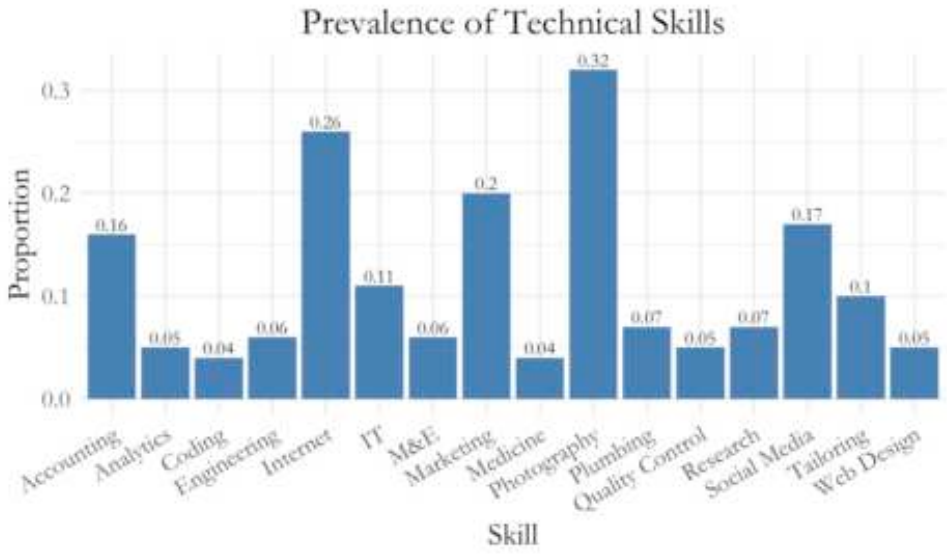
Education Levels of Those Surveyed

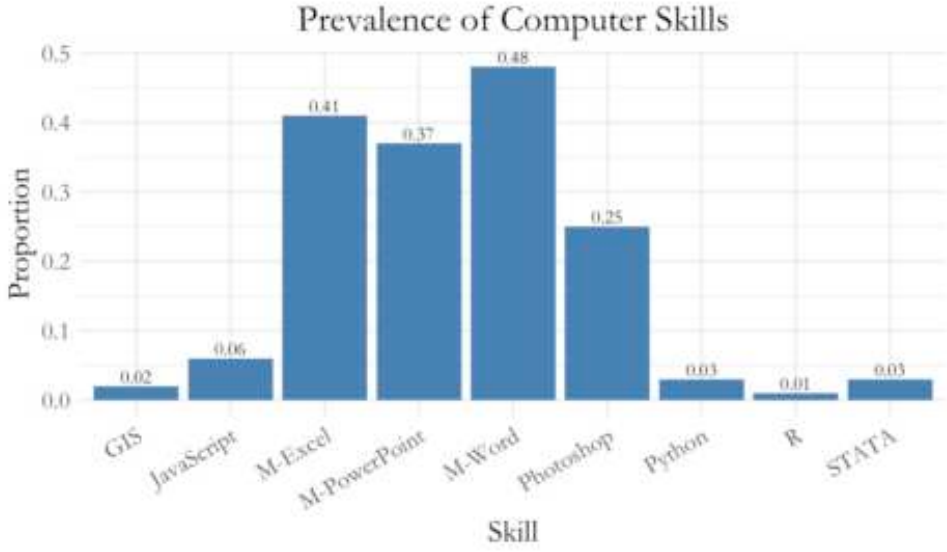


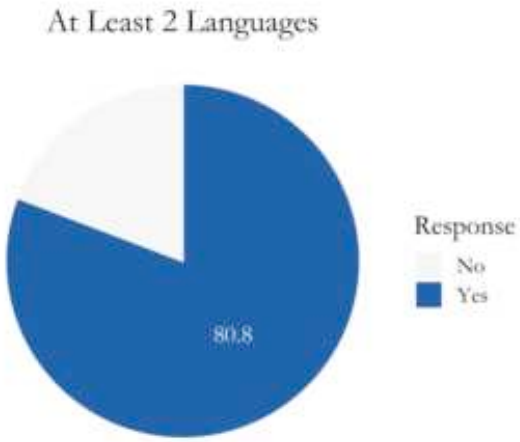

Future Plans for 646 Respondents
613
600
400
200
0
Count
176
103
11
Resettle
Return Home
School in Indonesia
Work in Indonesia
Option

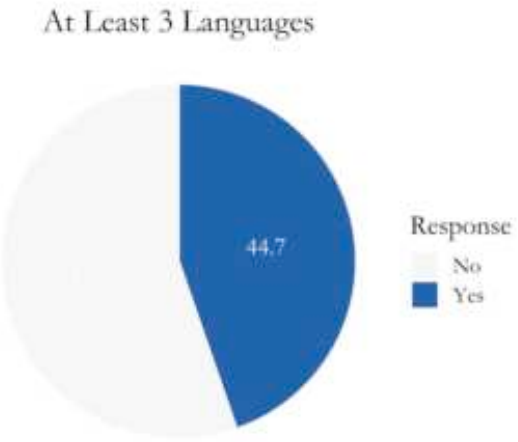

Proportion Who Would Seek Education
8.5
91.5
Response
No
Yes

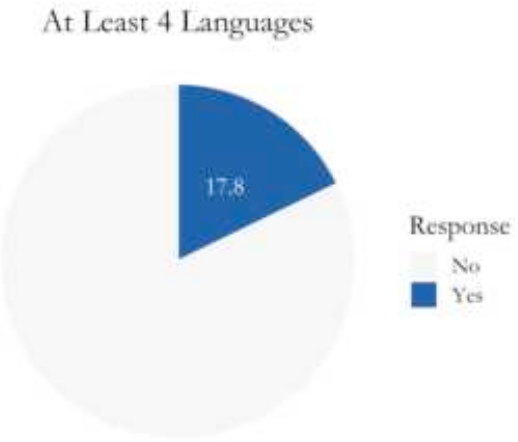

Proportion Who Would Seek Employment
14.6
85.4
Response
No
Yes

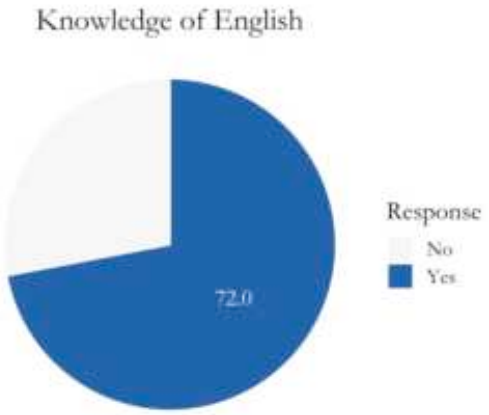

Prevalence of Technical Skills
Proportion
0.0
0.1
0.2
0.3
0.16
0.05
0.04
0.06
0.26
0.11
0.06
0.2
0.04
0.32
0.07
0.05
0.07
0.17
0.1
0.05
Accounting
Analytics
Coding
Engineering
Internet
IT
M&E
Marketing
Medicine
Photography
Plumbing
Quality Control
Research
Social Media
Tailoring
Web Design
Skill

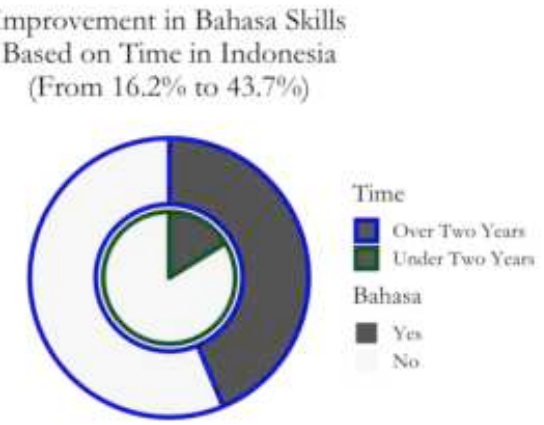

Prevalence of Computer Skills
Proportion
0.0
0.1
0.2
0.3
0.4
0.5
0.02
0.06
0.41
0.37
0.48
0.25
0.03
0.01
0.03
GIS
JavaScript
M-Excel
M-PowerPoint
M-Word
Photoshop
Python
R
STATA
Skill







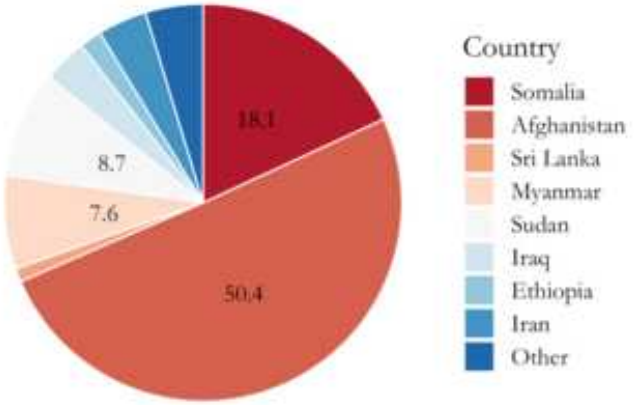




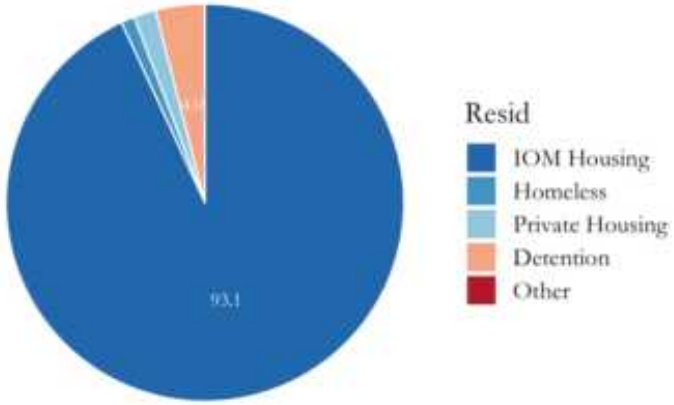
Source: Authors, September 2019

Appendix C: Survey Outcomes for Makassar Respondents

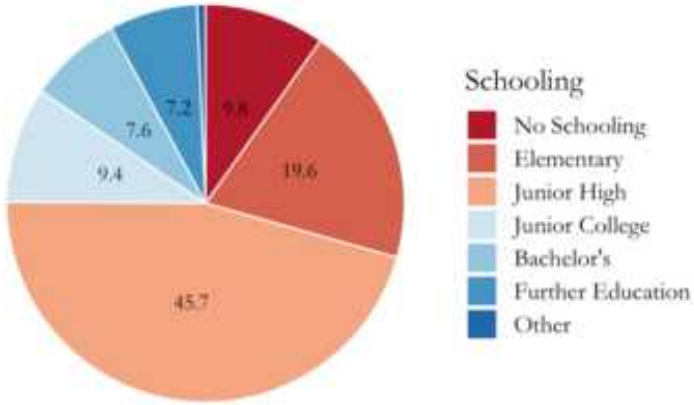
Surveys Collected By Country of Origin

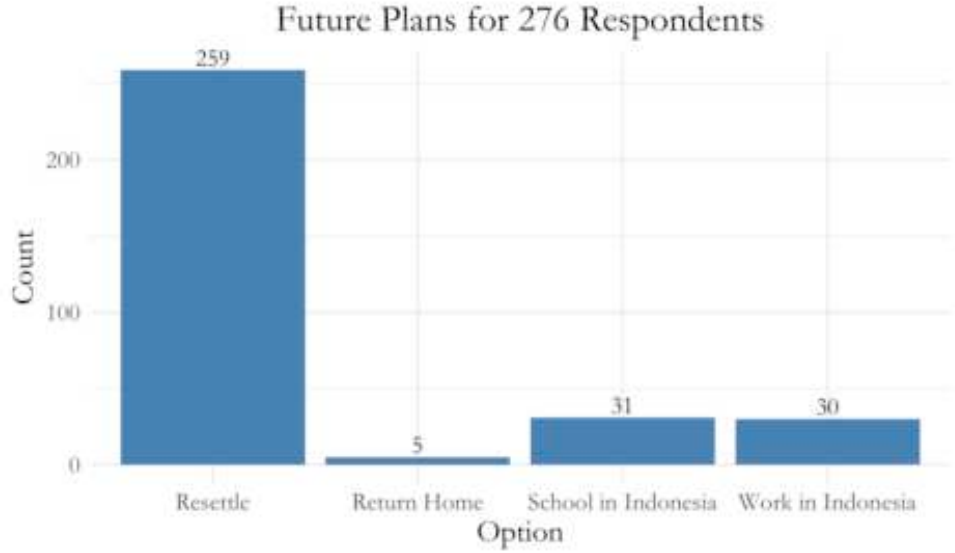


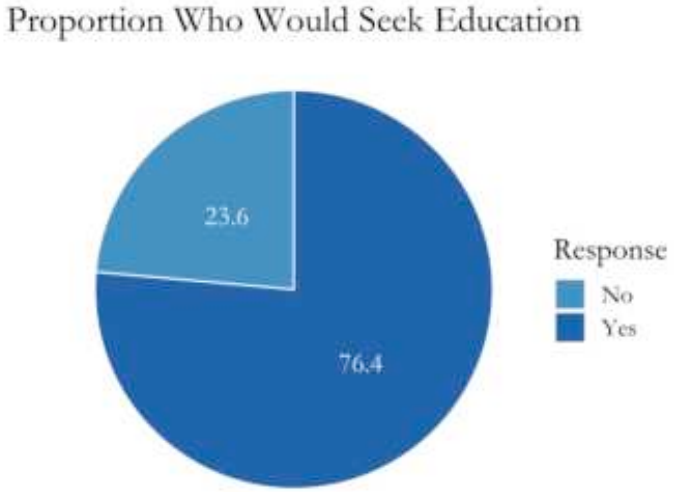
Living Situations of Those Surveyed

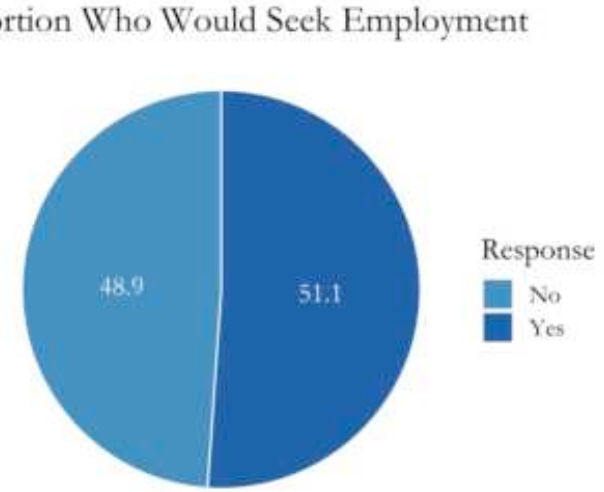


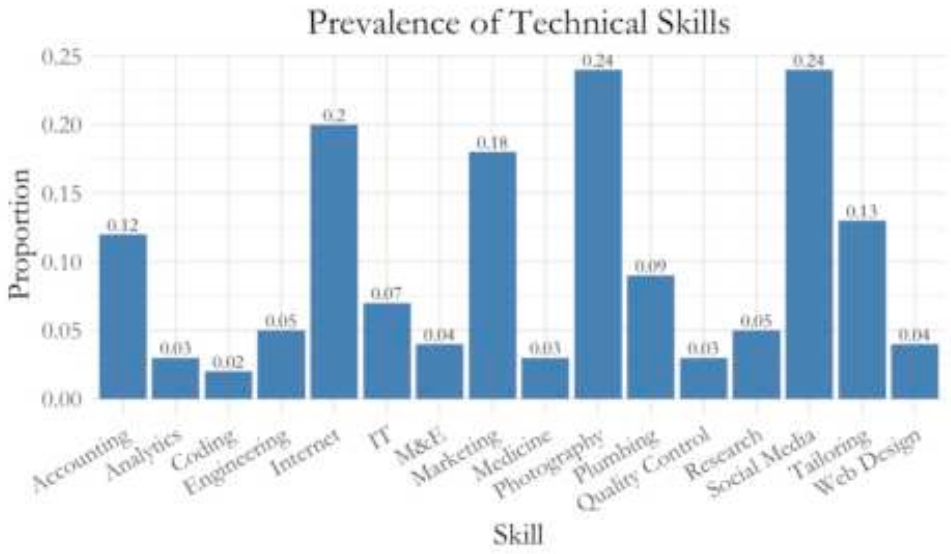
Education Levels of Those Surveyed

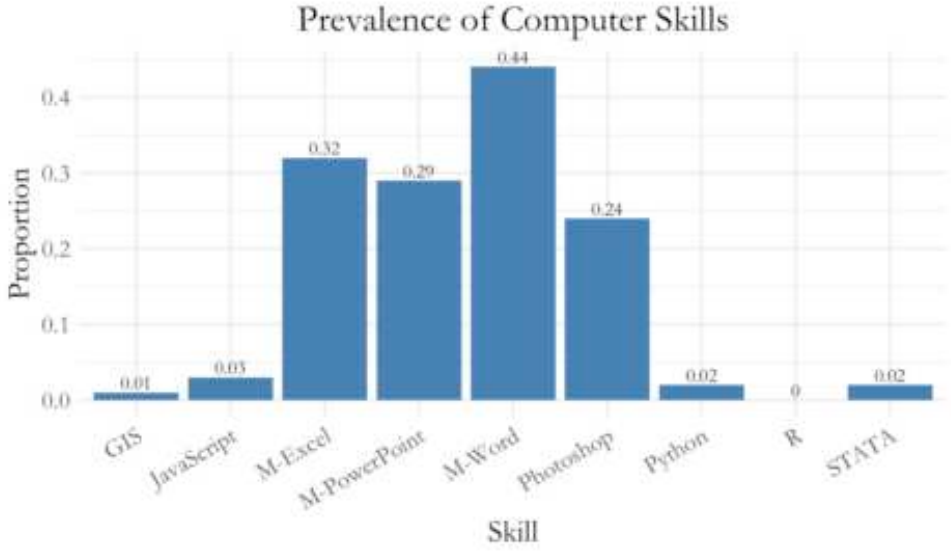


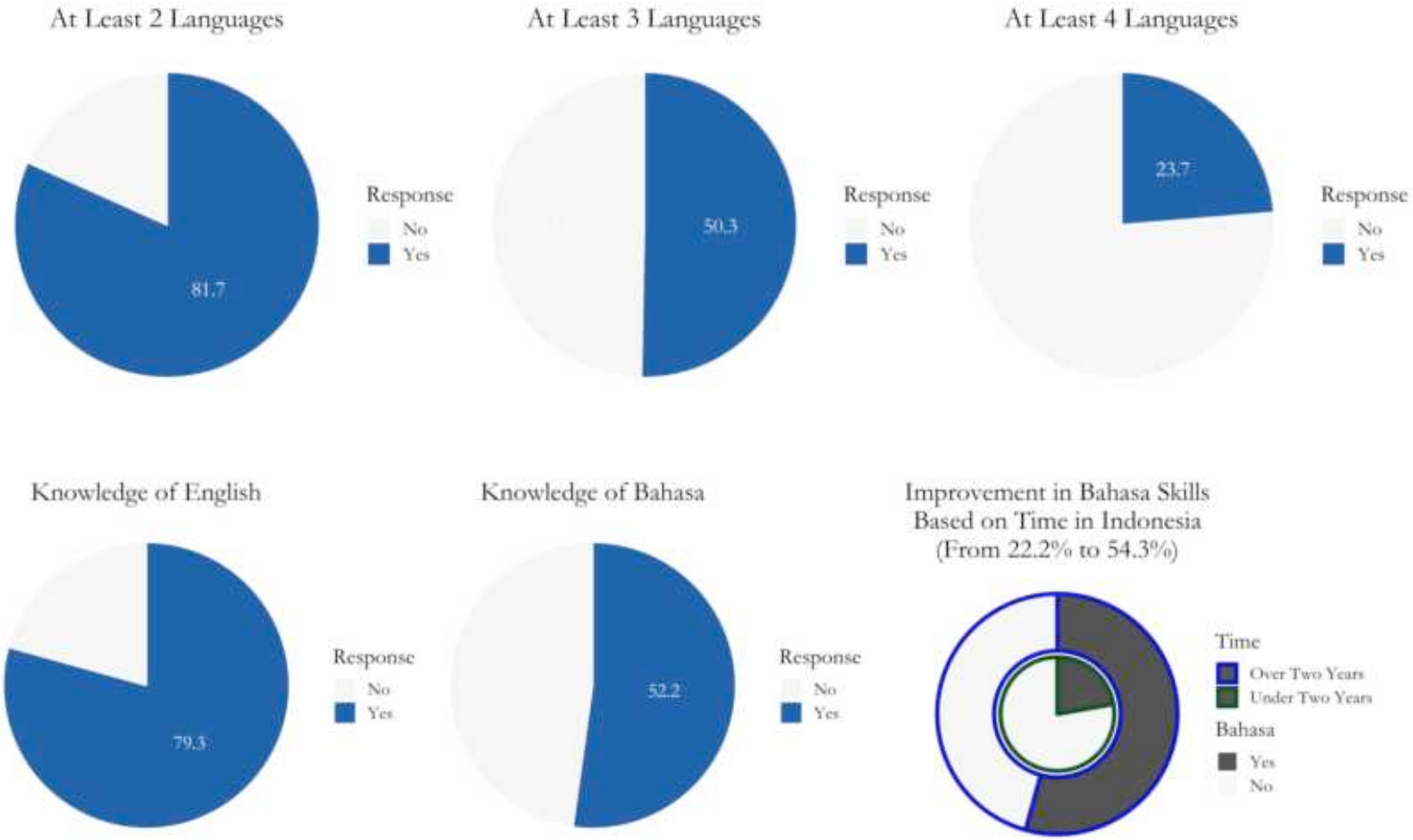

Future Plans for 276 Respondents
259
200
100
0
Count
5
31
30
Resettle
Return Home
School in Indonesia
Work in Indonesia
Option


Proportion Who Would Seek Education
23.6
76.4
Response
No
Yes


Proportion Who Would Seek Employment
48.9
51.1
Response
No
Yes


Prevalence of Technical Skills
Proportion
0.25
0.20
0.15
0.10
0.05
0.00
0.12
0.03
0.02
0.05
0.2
0.07
0.04
0.18
0.03
0.24
0.09
0.03
0.05
0.24
0.13
0.04
Accounting
Analytics
Coding
Engineering
Internet
IT
M&E
Marketing
Medicine
Photography
Plumbing
Quality Control
Research
Social Media
Tailoring
Web Design
Skill

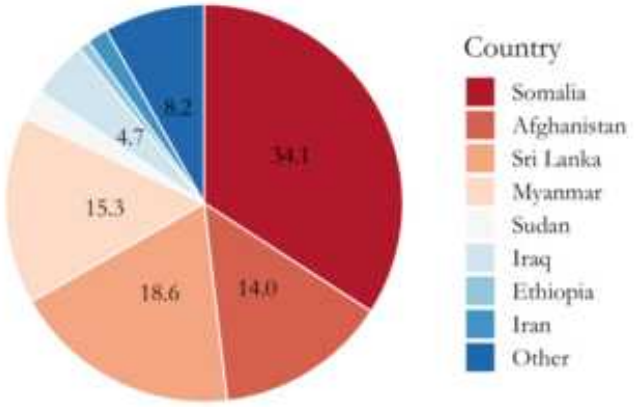

Prevalence of Computer Skills
Proportion
0.4
0.3
0.2
0.1
0.0
0.01
0.03
0.32
0.29
0.44
0.24
0.02
0
0.02
GIS
JavaScript
M-Excel
M-PowerPoint
M-Word
Photoshop
Python
R
STATA
Skill



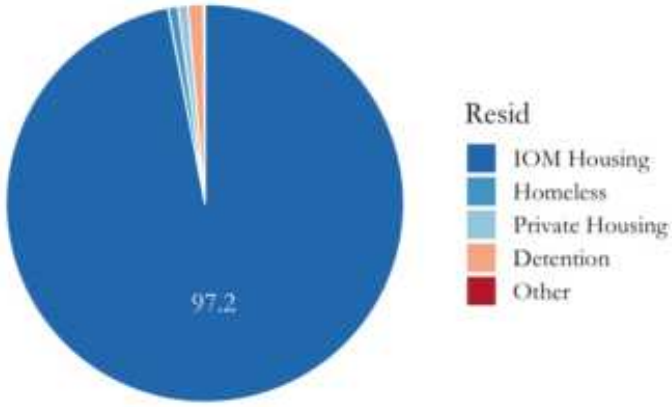
Source: Authors, September 2019

Appendix D: Survey Outcomes for Medan Respondents

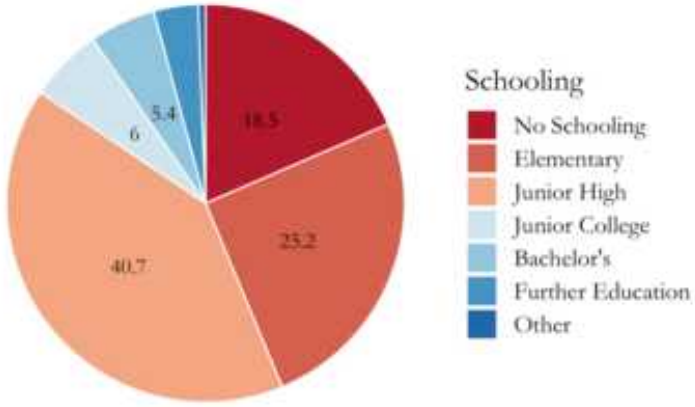
Surveys Collected By Country of Origin

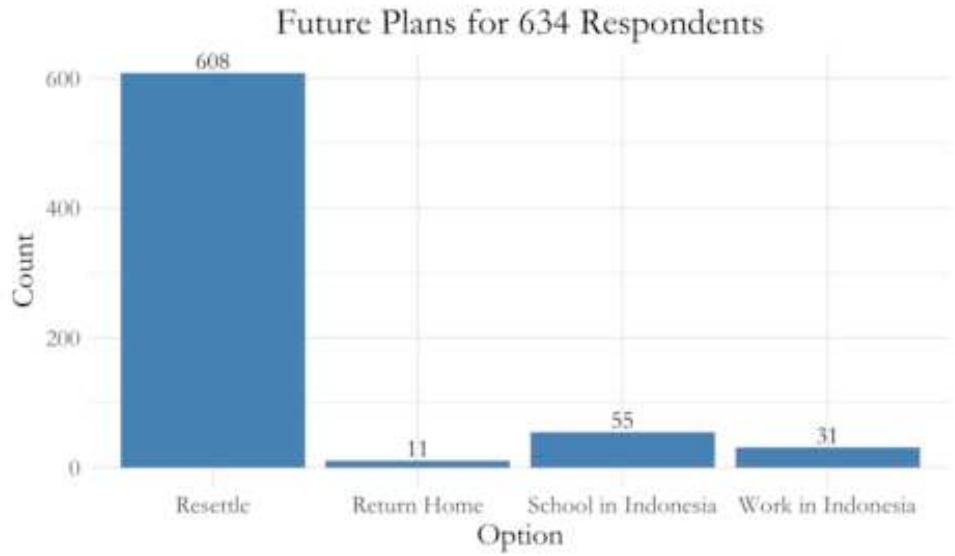


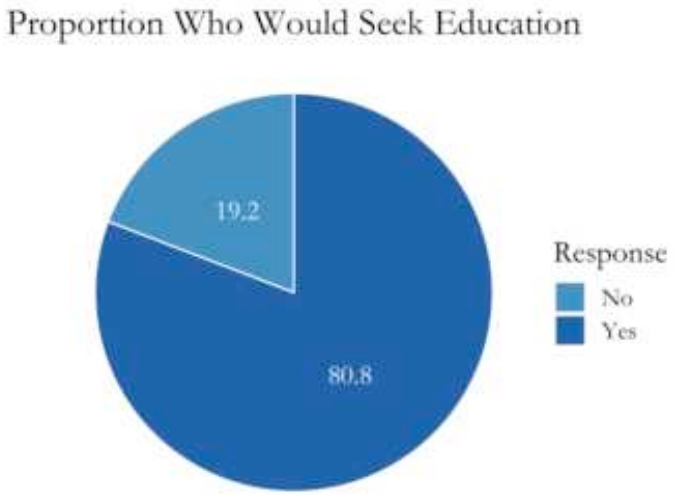
Living Situations of Those Surveyed

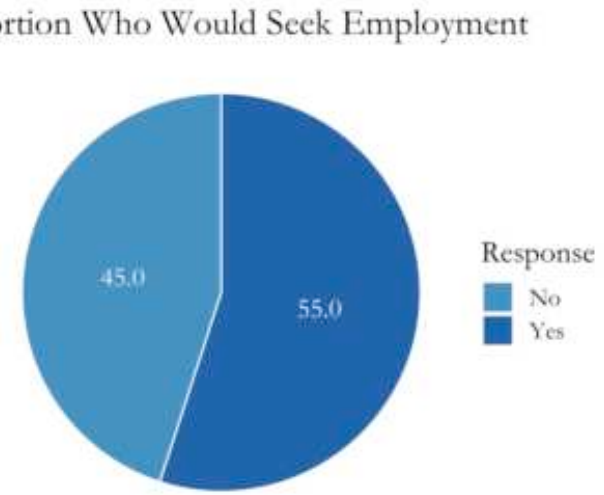


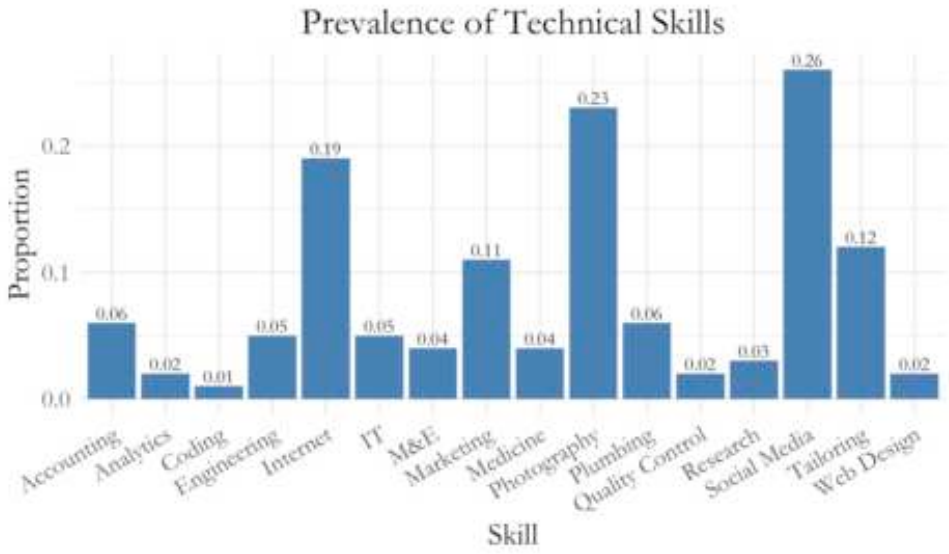
Education Levels of Those Surveyed

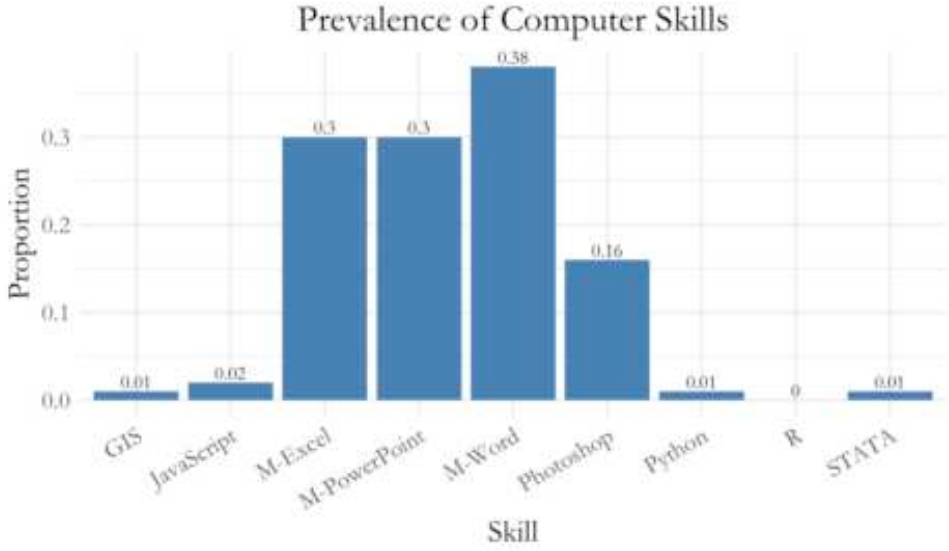


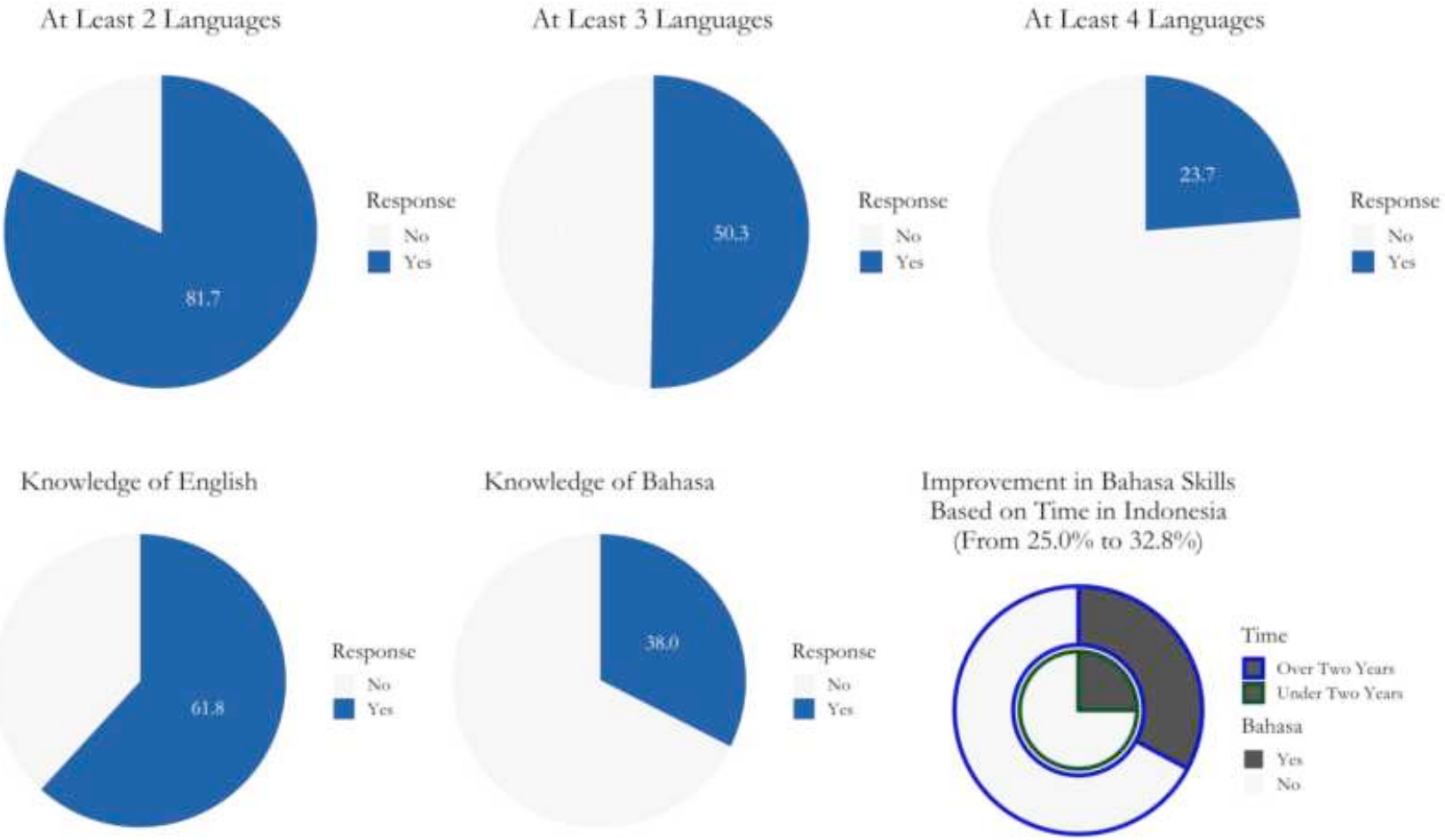

Future Plans for 634 Respondents
608
600
400
200
0
Count
11
55
31
Resettle
Return Home
School in Indonesia
Work in Indonesia
Option


Proportion Who Would Seek Education
19.2
80.8
Response
No
Yes


Proportion Who Would Seek Employment
45.0
55.0
Response
No
Yes


Prevalence of Technical Skills
Proportion
0.0
0.1
0.2
0.06
0.02
0.01
0.05
0.19
0.05
0.04
0.11
0.04
0.23
0.06
0.02
0.03
0.26
0.12
0.02
Accounting
Analytics
Coding
Engineering
Internet
IT
M&E
Marketing
Medicine
Photography
Plumbing
Quality Control
Research
Social Media
Tailoring
Web Design
Skill


Prevalence of Computer Skills
Proportion
0.0
0.1
0.2
0.3
0.01
0.02
0.3
0.3
0.38
0.16
0.01
0
0.01
GIS
JavaScript
M-Excel
M-PowerPoint
M-Word
Photoshop
Python
R
STATA
Skill



Source: Authors, September 2019

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