

Report on scientific-research work by government order:

**"Triennial Monitoring (2015-2017) of the
External Migration Situation in the RA
through Sampling Study"
Contract No. 10-2/TB**



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List of Acronyms

RA	Republic of Armenia
RF	Russian Federation
EEU	Eurasian Economic Union
EU	European Union
USA	United States of America
UN	United Nations Organisation
UNFPA	United Nations Fund for Population Activities
ICMPD	International Centre for Migration Policy Development
IOM	International Organization for Migration
USSR	Union Of Soviet Socialist Republics
NSS of the RA	National Statistical Service of the Republic of Armenia
HH	Household
BMIS	Border Management Information System
NMH	Non-Migrant Household
MH	Migrant Household
RM	Returned Migrant
MSO	Migrant Staying Overseas

Executive summary of study

Basic characteristics and features identified due to the study of current migration situation in the Republic of Armenia (RA) are as follows:

General information

1. Involvement of households of the RA in migration processes – with either an Migrants Staying Overseas (MSO), an Returned Migrant (RM) or both- has decreased: from 33,8% in 2015 to 31,6%. The share of the MSO households (from 15,9% to 14,1%), as well as both the RM households (HH) and the MSO households (from 1,7% to 1,2%) with the remainder made up of RM HH. **Yerevan City - 23,7% vs. 22,9% in 2015, other towns - 36,1% vs. 37,9% in 2015, rural areas - 36,4% vs. 42,3% in 2015.**

2. In 2013-2016 336.6 thousand people or approximately 11% of the RA population have engaged in migration processes. This circumstance (when compared to 2015 this indicator has decreased by 8.3%) testifies that **the involvement of population in migration processes has decreased as well.**

3. Based on the survey results and data received from the Border Management Information System (BMIS) an expert deduction was made that, in 2013-2015, a total of 55,100 people emigrated permanently. This number likely consists of entire families leaving the country for a longer or shorter period.

4. Throughout 2013-2016, the total value of the negative balance of the RA external migration turnover makes 150 thousand people and the structure thereof is as follows:

- (temporary or permanent) labour migration balance: -60 thousand people or 40%¹;
- permanent migration balance: -80 thousand people or 53% (versus 50% in 2015)
- the balance of other types of migration flows: -10 thousand people or approximately 7%.

This means that even though slower, **but nevertheless migration outflow volumes keep on growing** (annual average amounts 37.5 thousand people versus 35 thousand people in 2012-2015), and **this happens solely for the account of the growth of the number of migrants emigrated with the objective of establishing permanent residence.**

5. Majority of migration departures and arrivals to the Russian Federation (RF) keeps on falling, - 93.9% and 92.8% correspondingly. It is noteworthy that in the value of the negative balance of migration the RF share is even bigger - 97.8%.

6. The following peculiarities are characteristic to the change in the material status of MHs. Firstly, poverty rates keep on growing among MH (from 41.5% in 2015 to 42.6%). Secondly, the mentioned growth is accompanied by the poverty acuteness reduction (from 42,4% to 39,5%). **The reduction in the role of a migration as a factor for the improvement of the population's material status is not only a current phenomenon, but also is prone to intensification.** This is evident from the fact that **migrant rural households started to exceed non-migrant rural households in terms of poverty level and acuteness.** This phenomenon, due to radical decrease of earnings of seasonal migrant workers, constituting the majority of rural migrants, indicates that **migration in most cases appears as impoverishment factor.**

¹ Those are mainly migrant workers and the members of their households, accumulated overseas, who departed for longer than one year period.

7. The share of households receiving funds from abroad has decreased. If in 2015 only 23% of households have had such proceeds, including that for 13.6% of them these were the main source of income, and for 9.4% an additional source of income, then similar indicators for the current year are 22.1%, 11.6% and 10.5% correspondingly.

8. The share of those having incomes from abroad makes 52.6% among migrant households and 7.9% among non-migrant households.

9. The tendency for the decrease of the total value of the RA households' proceeds from abroad as a result of the survey still remains: the indicator decreased from USD 244.8 mln. in 2015 to USD 201.1 mln. Considering the likelihood of underreporting, the real figure may be higher.

10. Proceeds from abroad constituted an even smaller part of the incomes of households: only 52.8%, Non-Migrant Household (NMH) - 40.6%, Migrant Household (MH) - 57.6% versus 59%, 45.2% and 63.8% respectively in 2015. **The acuteness of this change gives grounds for speaking of a certain reduction in the households' dependence on the proceeds from abroad.**

11. Proceeds from abroad are mainly spent for immediate consumptive needs. They are primarily used for the satisfaction of overriding needs and the fulfilment of mandatory obligations, and only after that, upon availability of a positive balance, for meeting other needs. This is supported by the fact that both NMHs and MHs have spent 4/5 of their proceeds from abroad for "food/clothing", "utility and heating charges", "healthcare needs", "repayment of debts/credits."

12. Due to the reduction in remittances, HH save on "utility and heating charges", "food/clothing", "healthcare needs", "non-durable items/goods" and "ceremonies/events". Most HHs keep on using the proceeds from abroad to cover "food/clothing" item expenses. In general, only 17% of the households didn't incur expenses out of proceeds for the said items, 17% of MHs and 22% of NMHs. In order of importance, the "utility and heating charges" item comes in the second place. 36.4% of households didn't incur expenses out of proceeds for this item, of which 32.3% of NMHs and 46.9% of MHs.

13. An Aarea of concern is the decrease of shares of households that satisfied the needs for education and healthcare out of proceeds from abroad. Also, few HH were able to spend from remittances on "improvement of housing/living conditions", "leisure/recreation" and "business investments", which are of non-binding nature, although important from the viewpoint of life-sustaining activity of household members. Far less has become the share of the households which managed to make savings out of proceeds from abroad (1.9% versus 3.6% in 2015).

14. The share of emigrants among all the groups of population has decreased. Foremost, the shares of migrant workers - mainly seasonal migrant workers (from 10.1% to 8.8%) and rural migrant workers (from 6.5% to 5.5%) have decreased. This brings us to the conclusion that the main cause of the phenomenon is the economic situation in the RF.

15. At least it is primarily **the RF factor that can explain also the decrease of those, planning to emigrate in the coming year.** The share of "rather yes" respondents, who are mostly inclined to emigrate, decreased from 3.1% to 2.2%, and the share of those, who have already taken decision to emigrate ("yes" answer) - from 4.1% to 2.8%. Employing the approach in accordance to which the scenario of implementation by 50-60% for the first ones and 80-90% for the second ones is more likely, it turns out that in all likelihood the number of emigrants shall amount no less than 110 thousand people or approximately 3.7% of the population. These values have decreased when compared with the ones in 2015: by 40 thousand people and 1.3 percentage points successively.

16. Using the same evaluation method for the female line-up, it turns out that while amounting only 17.3% of those being out in emigration, their share among 110 thousand potential emigrants makes 39-40%. This disproportion triggers concern in as much as it is set forth below the share of temporarily departure among women emigrants is smaller and vice versa - the share of those emigrating for the purpose of establishment of permanent residence is bigger.

17. The situation with rural residents is exactly the opposite: the share of potential emigrants at 3.3% is smaller than the one of those out in emigration - 5.5%.

18. Shares of those out in emigration reduced either in almost all age groups. Their emigration potential has reduced as well. The age group of 25-54 is the one with the highest emigration potential.

19. Shares of those out in emigration and having intentions to emigrate reduced in almost all educational (student) groups. **The fact that people with higher education have the highest emigration potential continues to raise concern.**

20. Share of emigrants and potential emigrants are the lowest among "self-employed in agriculture" and "wage-worker: public" groups, which is to say that such kind of employment reduces the likelihood of emigration.

21. **"Wage-worker: non-public (private sector)" and "employer" groups continue to be the prevalent part of emigrants** - approximately their 1/5 and 1/4 correspondingly were employed abroad at the time of the survey.

22. Emigration potential continues to be high in the "service sector worker" group. Taking into consideration the fact that 8.3% of them are already out in emigration, the realization thereof is bound to have negative impact over the programme for the development of the RA tourism sphere.

23. **It was reconfirmed that the majority of those having high income are in emigration.** At that, if the share of emigrants among those receiving net monthly income in the amount of 200-300 thousand AMD has increased - from 42.8% in 2015 to 61.5%, then among those receiving 300 thousand AMD and more it has decreased - from 55.7% to 52.7%.

24. **The share of those emigrating for the "Employment" purpose has increased from 49.9% to 59.5%.** This was mainly done for the account of decrease in the share of those planning to depart for family purposes and resulted in the increase in the share of those, showing high probability of return, among planned departures - from 60% to 66%. Thus, the calculation shows that approximately 38 thousand people out of 110 thousand afore-mentioned potential emigrants can be considered permanently emigrating.

25. Emigration for educational purpose makes only 1.3% out of the whole, while the majority of them are women.

26. **Main reasons for migration intention continue to be the same: "failure to find employment/unemployed" (46.7%) and "earning money for household" (33.3%).**

27. **Approximately every second person of those who planned the departure has already received and/or is expecting to receive assistance in at least one issue of emigration.** The shares of those who have received/are expecting to receive assistance in the issues of "employment" and "dwelling" are bigger. It is characteristic that the share of those who have received/are expecting to receive financial assistance is big among Yerevan residents and is small among rural residents.

28. The RF is the main direction of departures of 85.3% of those who plan to emigrate (in 2015 this indicator was 80.5%). Besides the RF, another 17 countries were indicated as potential destinations.

29. According to the collective opinion of the potential emigrants the monthly income in the amount of 305.4 thousand AMD could be sufficient reason to refrain from departure, which exceeds the nominal (approximately 185.3 thousand AMD²) and net (129.8 thousand AMD) values of average monthly salary for the first 9 months of 2016 in Armenia by 1.6 and almost 2.4 times correspondingly.

Households with returning migrants

30. The main feature of professional structure of RMs has grown more acute: the majority consists of unskilled workmen - 50.8% (the same rate for 2015 was 45.5%). Hence, it follows that firstly, the majority of the RMs continues to be outbound unskilled returned migrants - mainly those who returned from seasonal employment; secondly, the state of affairs in the RF has a great impact over the unskilled labourers who are engaged in general labour due to the lack of profession.

31. Prior to departure from the RA the share of RMs who were employed made 40.7%, and of those who are employed after return - 56.7%, then while staying overseas, their employment rate was 76.6%. While abroad 90% of migrants were self-employed.

32. Out of 40 months preceding the survey, an average RM stayed in the RA for 27.4 months and in emigration for 12.6 months.

33. In Armenia and abroad, the majority of employment of the returned migrant wage-workers (51.1% and 58.5% respectively) was not arranged through formal employment contracts. Especially in the case of outbound labour, this situation makes the wage-worker legally and financially vulnerable and creates fertile soil for the abusers. On the other hand, as compared to 2015, the non-formal employment is smaller by 14.6%, which can be explained by the fact that, according to the requirements of the procedure for the employment in the other European Economic Union (EEU) country, introduced in 2015 for the citizens of the EEU countries, the necessary and sufficient condition thereof is the written labour contract with the employer.

34. Construction continues to remain the main area of outbound labour for RMs, where approximately 2/3 of all RMs were engaged in that industry.

35. The works performed by the RMs in the RA and overseas in fact do not vary in the context of conformance to the specialization and qualification. 26-33% of the RMs are/were engaged in the works not conforming to their specialization. 24-34% of them are/were engaged in the works not conforming to their qualification.

36. Average duration of the working week of the RMs engaged in outbound labour was 59.6 hours, which exceeded the average duration of their working week (50.4 hours) in the RA by approximately 9.2 hours or 15.4%. In the Republic of Armenia the situation, relating to mandatory days-off provided for by the relevant legislation, was even worse. **In the RA 28.9% of**

² <http://www.armstat.am/am/?nid=126&id=08001>

them have had no days-off, and 17.2% of them have had no days-off when employed abroad.

37. The average amount of RMs earnings made abroad before taxes has decreased from 597.3 thousand AMD in 2015 to 264 thousand AMD or approximately 2.3 times. This could be explained with the fall in the exchange rate of the Russian Rouble. In contrast to the aforementioned, the average value of their earnings after the return has increased by 16% - 89.8 thousand AMD and 103.8 thousand AMD correspondingly. As a result **the variance between their earnings in the Republic of Armenia and overseas has decreased from 6.6 times in 2015 to 2.5 times.**

38. The RMs has searched for/found employment in the following way: with the help of "foreign foreman/employer" (58.3%) and "other foreign resident" (through foreign social networks - 24.2%), in the RA - through local social networks (35.3%) and with the assistance of the RA entrepreneurs (23.7%). It is worrying that the specialized employment agencies - both public and private, both in the RA and overseas - play a small part in the settlement of the RM employment problem.

39. Approximately 1/4 of the RMs employment trips have been taken without preliminary agreement on the employment. And in 70% of the mentioned cases only verbal promise has been given. Only 2.6% of them departed based on verbal contract. This gives grounds for speaking that the situation has not changed in this context - **the RA labour migration continues to be a spontaneous phenomenon.**

40. 85.8% of the RMs have reported no problems with their last outbound employment. Nevertheless, this fact shall be negatively evaluated, because the share of the RMs, who have had no outbound employment problems in 2015, was bigger - 91.8%. Some of the increase in reported problems can be attributed to more instances of forced labour.

41. 41.7% of the RMs, who faced problems, became indebted, 15.5% were subject to movement restriction, 2% were subject to the seizure of their documents and more than half of them were subject to other types of coercion.

42. Thus, there are grounds to assume that in the current year there was an increase in the number of RMs, who, involuntarily and having fine/penalty records in their outbound employment, fell victim to forced labour.

43. The overwhelming majority of the RMs' migration trips (93.2%) are still departures-arrivals to and from Russian Federation. The main reasons for the recent departures are "earning money for supporting the household" and "unemployment/failure to find employment" (approximately every second surveyed RM indicated both the first and the second reasons). The third reason in order of importance continues to be "highly paid employment".

44. Prior to departure, approximately 4/5 of RMs had social networks in the country of destination, while just like in 2015 their share is the biggest among Yerevan residents - 86.7%, and lowest among rural residents - 76.8%. Only 30% of the RMs didn't receive assistance from the destination country's social networks in the matter of departure versus 25.5% in 2015.

45. If in 2015 40.3% of RMs managed to accomplish their last departure at their own expense, and other 19.8% - by means of donated funds, then the similar values for the current year are just 37.5% and 12.2% correspondingly. Thus, **the share of departures taken through borrowings, which are risk factors, has sharply increased - every 3-rd RM, whereas in 2015 this value only amounted to every 5-th.**

46. Just like in 2015, when staying in the country of last destination, the majority of the RMs - approximately 80%, has violated the procedure for state registration of migration trips by not getting registered with the RA consular agency. There are two major reasons for this: unawareness (44.5%) and giving no importance to the issue (29.8%). Therefore, the below conclusion-suggestion of 2013 study remains in full force and effect: **"It is necessary to develop, launch and consistently implement awareness raising campaigns with the involvement of the mass media, targeting the broad population, on the significance and importance of migration active record-keeping, on the ways of implementation and the methods thereof, on the implementing structures, and on the commitments of migrants."**

47. The share (20.8%) of the RMs who resided in the customized non-residential premises during their last migration trip is twice more than in 2015. This can be evaluated as a negative change. It is to be supposed that the above-mentioned is conditioned on the one hand by dwindling of their financial resources - seeking to save on the reduction of expenditures for housing, and on the other hand by constituting a bigger share of seasonal migrant workers among them.

48. Just like in 2015, the overwhelming majority of the RMs had no health insurance, which gives grounds for stating that healthcare is one of the key problems of the RA migration.

49. The incomes of RMs in the country of last destination have afforded slightly more opportunities for making savings than in 2015, which, in view of the reduction of their incomes, has presumably become possible due to application of a strict economising strategy.

50. 94% of the RMs (in 2015 - 92.6%) had no problems of non-labour nature with any entity, group, or person during their last migration trip. Just like in the previous year, the greater part of existing problems were related to the migration service. A significant part of the problems - over 47%, has never been solved, 20.8% of the problems were solved by way of giving bribes/presents, and 7.5% with the help of friends/relatives and employers.

51. Only slightly more than 15% of all RMs have more or less improved their material status, while for 34% of them it has become worse.

52. As compared to 2015, the number of the RMs (75.3%) who didn't mention having had reintegration problems has increased to 82.3%. At the same time, finding employment continues to be a significant challenge (specified by almost 2/3 of the RMs who faced the mentioned problem, for rural residents it amounts to over 85%).

53. Despite the significant decrease (33.2% versus 41.2% in 2015), the emigration potential of the RMs not only continues to be high, but also remarkably prevails over the same value of the overall population (6.5 times versus 5.7 times in 2015). A decrease in the emigration potential of Yerevan residents and women is more emphasized (25% and 27% respectively versus 36% for rural residents).

54. Whereas the emigration potential of highly educated RMs practically remained at the same level (39%, and in 2015 it made 39.2%), they constitute the group with the highest emigration potential.

55. Unsurprisingly, and just like in 2015, unemployed RMs have the highest emigration potential among the groups - every 2-nd of them plan a new departure.

56. Small deviations of the average values of net monthly income (definitely planning new departure - 90.3 thousand AMD, excluding departure - 106.4 thousand AMD) of RM groups, varying in emigration plans, brings us to the conclusion that **holding a job in the RA is more important in limiting the emigration potential than the amount of income.**

57. As compared to 2015, the destination of an even greater part (93.4%) of the migration trips planned by the RMs is the Russian Federation. Totally 2.7% of them plan to emigrate to European countries, and 1.7% to the USA or Canada.

58. In response to the question - "if earning money is the main reason for emigration, then what is the net amount of monthly income (in thousands AMD) that will be enough for you to refrain from departure" - the aggregate opinion (answer) of respondent RMs planning to emigrate in the current year was slightly more modest compared to the one for the previous period (315.5 thousand AMD versus 336 thousand AMD in 2015). Taking into account that the RA economy can hardly ensure such level of incomes for the population in the near future, there is no escaping the fact that a certain part of the surveyed population has probably specified the desired rather than the lowest value of sufficient income that would enable them to refrain from emigration, which is to say that the value of the given average is exaggerated to various extents. In addition to this, as it has been shown above - the availability of employment even if not paid sufficiently though consistently enough, is a factor for the limitation of the emigration potential, and it can be assumed that **working positions with the assigned salaries in the amount of 200-250 thousand AMD can be effective in terms of reduction of the volumes of population emigration.**

59. 96% of the RMs have had no indicated need for assistance by any of the RA entities in the issues of arrangement and fulfilment of their departure.

60. About 70% of the RA population of 15 years of age and above are not aware of the procedure for stay, residence, and employment of citizens of other member states of the EEU in the territory of a member state of the EEU (awareness among non-migrants is 24.5%, among RMs - 63.7% and among MSOs - 81.6%). **Both this fact and the high dynamics of the migration processes (involvement of new flows) suggest that the issue of awareness of migration legislation, including familiarization with the provisions of this new procedure, requires an immediate solution.**

61. The mentioned provisions have been violated only with respect to 0.1% of the respondents aware of the provisions for staying in the EEU countries. This seems to testify that eventually gone are the days when our migrants have been continuously exposed to violations and corruption risks due to intricate and vague migration legislation of the RF.

62. **91.3% of all RMs did not contact any of the Armenian Diaspora organisations during their last migration trip.** This can be explained on the one hand by the fact that they are mainly seasonal migrant workers, whose tight working schedule limits not only the chances for off-hour contacts, but also the willingness to do so, and on the other hand by the fact that, as a general rule, the entities of the diaspora take no responsibility for the fellow-countrymen, who are in temporary employment in their territory. Therefore, it is fair to assume that the majority of the RMs who intercommunicated with the entities of diaspora were those trying to establish permanent residence and/or the long-term migrants. Only 38.2% of those RMs who have had contacts with the Diaspora have made any contribution to the activity of the said entities (majority have had contribution in the form of knowledge/skills - 17.1%, financial contribution - 9.2%, other type of contribution - 11.8%).

Households having migrants abroad

63. **The peculiarity of the educational composition of the MSOs for the current year consists in the greater share of highly educated persons - 22% versus 17.6% in 2015.** This is predetermined by the reduction of rural residents (12%) and the growth of Yerevan residents (36.3%) among them, and in the corresponding differences in education levels.

64. Approximately 3/4 of the MSOs were in employment at the time of observation, while another slightly over 13% part of them being unemployed.

65. The professional composition of the MSOs remained almost unchanged as compared to 2015 and practically it does not vary from the one of the RMs. Just like in case of the latter, the essential part of them - 48.8%, lacking occupational qualifications, can only get engaged in the unskilled labour.

66. "Failure to find employment/unemployment" has been indicated as the only or at least 2nd reason for emigration for 3/5 of the MSOs of 15-years of age or over and for approximately 2/3 of men and rural residents. For Yerevan residents (48.1%), and particularly female (21.4%) MSOs, it was less significant. "Earning money for supporting the household" has been indicated for 49.4% of the MSOs, at that - with almost the same differentiation. "Highly paid employment", which comes third in the order of importance, has been indicated for 1/4 of the MSOs. The total frequency of employment and economic reasons amounted to 134.7%, which means that 2 such reasons have been indicated for the majority of the MSOs. Yerevan residents and female respondents indicated in 30%, respectively 68%, other reasons for their departure.

67. Only 1/4 of the MSOs don't have any social network in the country of destination. 31.8% of the MSOs who own social capital haven't received any assistance on the issues of emigration. Their bigger part (47.3%) - in case of the rural residents even bigger (59.6%) - received assistance in the matter of employment. 1/3 of the MSOs received assistance in the matter of housing. The share of those who received financial assistance is considerably smaller (9% versus 15.7% in 2015), which **either** speaks of the reduction of material resources of social networks of the foreign country or...?.

68. A majority of MSOs – approximately 3/4 report unresolved health issues.

69. Almost 3/4 of the MSOs render financial assistance to their families (39% - "regularly"). Another 9.6% of them, who are willing and have relevant opportunity, are lacking any option to do so. Only 12% of the MSOs have no opportunity to provide assistance to their households.

70. Only of 47.1% of the MSOs said that they would definitely return to Armenia. The share of permanent emigrants among them amounts to 14.1%. The probability of return of Yerevan residents and particularly female MSOs is dramatically lower and, to the contrary, the share of male and rural residents MSOs is higher.

71. In more than 2/3 of the cases, the cause of the MSOs' return shall be "achievement of the goal". The second cause (if not the principal one) for the return of 2/5 of them shall be "reunification with family/relatives".

72. 9 out of 10 MSOs, including even 97% of the male MSOs, far in advance have already had intentions to get employed in the receiving country. In this context, only women were differentiated - the trip of every 2nd person was without a clear perspective of employment, at least initially. **70.8% of the MSOs who departed with a view of employment have had some sort of preliminary agreement, mainly "assurances" (65.1%).**

73. The RA and foreign state employment agencies have facilitated only 1 MSO each in the matter of employment, and private employment agencies of the RA - 2 MSOs. It is against this background that the participation of foreign private agencies can be evaluated as satisfactory—as they have facilitated 23 MSOs. This leads to the conclusion that most of the employment abroad was arranged through informal channels.

74. Only 47.2% of the MSOs were in employment in the RA prior to departure, while when abroad - 80.1%. Just like in case with RMs this is indicative of disproportion of supply and

demand in the RA on one hand, and non-competitiveness of the local job demand as compared to abroad on the other hand.

75. The averaged data of the MSOs' time balance over the period since the beginning of 2013 to 1 June 2016, while testifying that the MSOs were staying overseas during 19 months or 47.5% out of the said 40 (i.e. averagely for 6 month longer period than the RMs).

76. Prior to the departure and after the emigration, positive changes took place in terms of the legality of employment arrangements of the MSO migrant wage-workers. If in 2015, 56.4% of their employment in the RA was taken on a non-contractual basis, i.e. hidden employment, and overseas it made amounted to 64.3%, while according to the data for the current year they were 50.8% and 49.2% successively.

77. Construction continues to be the main area of the MSOs employment overseas - over 63%.

78. The average duration of the non-domestic working week of the MSOs is 61 hours which is 12.4 hours or ^{1/4}-th more than the average duration of the RA (domestic) working week.

79. A more than twofold reduction in the average amount of the outbound earned income of the MSOs for 2015 (from 600 thousand AMD to 261.7 thousand AMD) was not followed by a growth. Instead, another 3% decrease took place (254.2 thousand AMD). Being followed by the slight growth of the MSOs earned income in the RA (from 85 thousand AMD in 2015 to 87.5 thousand AMD), it has reduced even further the value of variance of the average value of the earned income in the RA and of the outbound earned income (by 2.9 times versus 3.1 times in 2015). **Thus, the reduction in added (financial) value of labour migration still proceeds.**

Migration and Development

80. 58.1% of the households that had proceeds from abroad and 47.9% of the RMs due to insufficiency of incomes do not even think of making business investments. In addition, a considerable part of the households and the RMs (37.2% and 17.1% successively) is unwilling to make business investments.

81. Thus, only about 35% (56.7 thousand persons) of the RMs line-up, amounting approximately 162 thousand people, both had/have the possibility and the willingness to make business investments in the homeland. Only 1 of 10 or 3.6% of them have in fact made such attempts, mainly in agriculture, construction, trade and repair/maintenance. In 1 case out of 5, the results were considered unsatisfactory by the RMS and in 3 cases out of 10 – as a complete failure.

82. All the aforesaid give grounds for concluding that there is a rather limited potential for business investment from migrants.

83. Only 9.1% of the RMs evaluated the RA investment environment as "completely favourable", "favourable" and "rather favourable", 29.4% - "rather unfavourable" and 49.4% - "completely unfavourable".

84. The viewpoints of the households and the RMs having proceeds from abroad on the impediments for business investments somewhat vary. Thus, if on the most considerable impediment, i.e. "tax burden", they hold the same views (specified by more than 1/4 of the

RMs and 1/5 of the households), then on the issue of the second one in order of importance there is a certain divergence of opinion. If in the collective opinion of the households **the "insolvency of population" (15.3%)** tops the list, which ranks third (15.7%) in case of the RMs, then in the collective opinion of the RMs **the "monopolized market" (18.9%)** comes third, which in order of importance ranks fourth (10.4%) in case with the households. **The "lack of trust/riskiness" was evaluated as a serious impediment. Corruption was mentioned to a lesser extent** (households - 9.4%, the RMs - 7.5%).

85. Only 4.2% of households (7.3 thousand households) have the capacity and willingness to make investments in community development programmes. The fact that among rural residents their share is twice as much - 8.2%, is due to their community spirit being more evolved. The majority of the households that have opportunities and the willingness to make investments set forth the involvement of community's municipality and other households as a condition for participation.

86. Only 1% of RMs keep their savings in Armenian banks. Taking into consideration that the main reason for this is that 88.5% of them are lacking savings there is no denying that if it weren't for other impediments including a lack of trust in the banks, the said share, while being 10 times as much, would be crucial for the development of the banking system.

87. From the viewpoint of the increase in the volume of remittances from abroad and the encouragement of migrant-made business investments in the Republic of Armenia, the RMs have rated highly possible opportunities for the reduction of rates for remittance, the introduction of conditions for encouraging migrants to keep their savings in the RA banks, and the application of practices when repeated remittances are taken for a credit guarantee.

88. According to **the estimation of 57.7 % of RMs, their knowledge and skills were enhanced as a result of their migration trips** - (15.5% of them responded that the said enhancement was "considerable"). The low number of migrant students among them and prevalence of the share of working migrants give grounds for assuming that this enhancement occurred during employment.

89. The fact that the share (41%) of RMs who have enhanced their competitiveness in the Armenian labour market due to migration is smaller than the share of those who in their own assessment enhanced their knowledge and skills as a result of migration trip, indicates that new knowledge and skills didn't necessarily increase their chances in the Armenian labour market.

Triennial Monitoring (2015-2017) of the External Migration Situation in the RA through Sampling Study

This paper is an executive summary of the “Triennial Monitoring (2015-2017) of the External Migration Situation in the RA through Sampling Study”, conducted by the Armenian-Russian (Slavonic) University, with support from the EU-funded project 'Support to Migration and Border Management in Armenia' (MIBMA). With the support from the latter, the conduct of 1,495 supplementary surveys became possible. In turn, this enabled the authors to obtain representative data not only at the level of the population of the Republic of Armenia in general, but also at the level of the population of Yerevan City and other urban and rural populated areas.

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